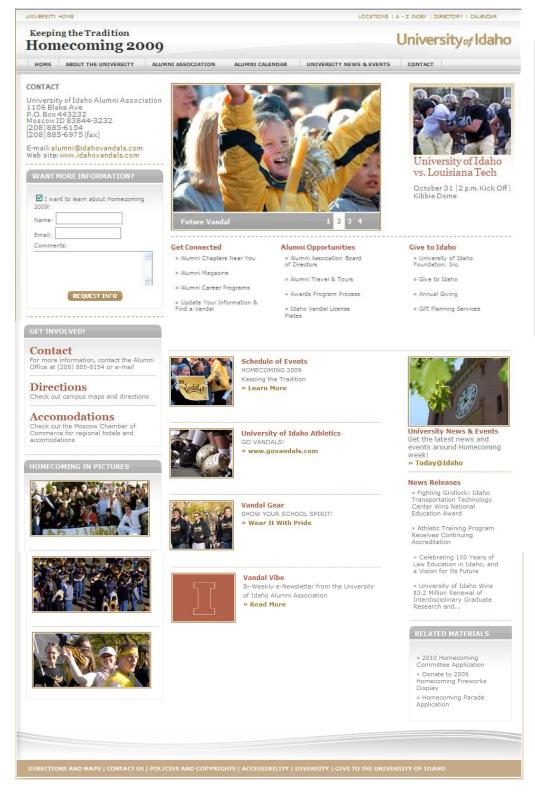
University of Idaho

Web Author Tutorial Building a Portal

Updated Jan. 2010

NOTE 1: If you want to do this tutorial, you will need to ask your Coordinator to add a "Miniportal" to your permission area for you to use as part of the demo exercise (only Coordinators can add miniportals). Portal development requires full architecture and content strategy so you will need to work with your Coordinator before any new sites are built in this template.

NOTE 2: You can see in the portal screenshot/call out hand out that there is a customizable Global Navigation at the top of the page. Global navigation objects are controlled by Coordinators – so you will want to work with your Coordinator to add the Global Navigation.



Task... Build a Portal

Homecoming is a sample of a completed Portal. You can view it at http://www.uidaho.edu/homec oming and use it as a model. The Homecoming Portal uses the Small Flash feature as the banner. Reminder that there are two other options... >602x188 banner (as seen with Vandal Vibe at www.uidaho.edu/idahovandals <u>/vandalvibe</u> and > 313 promo (as seen on the Research Park site at www.uidaho.edu/uirp) These final two options are both static images.

Objects You Will Create

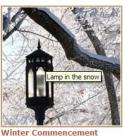
- Small Flash feature with 187 promo
- One 187 promo
- Four 116 promos
- Action Item
- Spotlight Promo List
- Three List of Links
- One Related Links
- Contact Information
- One Rich Text

Step-By-Step Instruction

- 1. Work with your Coordinator to have them set up a Demo Portal in your permissions area.
- 2. Put your cursor on the Demo Portal > Rename > give it a name without symbols or characters or spaces for how you want it to appear in the url > OK
- 3. Put your cursor on your Demo Portal > Display Name > give it the name you want to appear on the site itself > OK

Creating a Small Flash Feature Object + 187 promo...





Moscow campus

Saturday, Dec. 12, 2009

- 1. Put your cursor back on the Demo portal > right click > insert Small Flash Feature slideshow
- 2. Give it a logical name with no characters or symbols > Save
- 3. Put your cursor on the Small Flash Feature you created > right click > insert > Small Flash Feature slide
- 4. Give it a logical name with no characters or symbols > upload a 394x244 image from the media library > insert a Description > select the target item (if outside of Sitecore you will need to create a link under the slide) > Save
- 5. Create 3-5 more Flash Feature slides by repeating steps 3-4
- 6. The slides will appear in the order they show in the tree so if you need to reorder them, use your sorting arrows
- 7. To create the 187 promo... Put your cursor back on Main Small Flash Feature, right click > insert > "Promo 187". When the box comes up, give it a logical name with no symbols or characters > Save
- 8. The promo content box will come up on the right of your screen. Follow these steps...
 - Insert a 187x128 or 187x187 image from the media library
 - b. Select the target item (if outside of Sitecore you will need to create a link under the slide)
 - c. Give it a headline
 - d. Give it a subhead
 - e. Type in a summary statement
 - f. After you have inserted the text into the fields... > Save
- 9. To populate the Flash Feature with the 187 you just created, put your cursor back on the Small Flash Feature > Edit > Edit > Find your 187 promo in the Right Column tree and use the right arrow to move it over > Save

Create another 187 Promo

- 10. Put your cursor back on Demo Portal, right click > insert > "Promo 187". When the box comes up, name it "187Promo" > Save
 - a. Insert a 187x128 or 187x187 image from the media library
 - b. Select the target item (if outside of Sitecore you will need to create a link under the slide)
 - c. Give it a headline
 - d. Give it a subhead
 - e. Type in a summary statement
- 11. After you have inserted the text into the fields... > Save



Create Four 116 Promos

- 12. Put your cursor back on Demo Portal, right click > insert > "Promo 116". When the box comes up, give it a logical name with no symbols or characters > Save
 - a. Insert a 116x89 image from the media library
 - b. Select the target item (if outside of Sitecore you will need to create a link under the slide)
 - c. Give it a headline
 - d. Give it a subhead
 - e. Type in a summary statement
- 13. After you have inserted the text into the fields... > Save
- 14. Create three more 116 promos by repeating Step 13-14



Create an Action Item

- 15. Put your cursor back on the Portal Demo site > right click > insert > "Action Item" when the box comes up, Name it lowercase, no spaces > Display Name > rename it with spaces, caps, etc. > OK > Save. Not that the Display Name is what will appear in the grey box area of the Action Item.
- 16. Put your cursor on the Action Item > right click > insert > Action Item Link. When the box comes up, name it Apply > OK. On the right side of the screen in the content area, in the "subtext" field type in "Subtext". In the "link" field click on "Insert Link" > the Sitecore tree will open > select one of the existing College icons at the bottom of the tree. > Save
- 17. Put your cursor on the Action Item > right click > insert > Action Item Link. When the box comes up, name it Contact Us > OK. On the right side of the screen in the content area, in the "subtext" field type in "Subtext". In the "link" field click on "Insert Link" > the Sitecore tree will open > select one of the existing College icons at the bottom of the tree. > Save
- 18. Put your cursor on the Action Item > right click > insert > Action Item Link. When the box comes up, name it Parking Info > OK. On the right side of the screen in the content area, in the "subtext" field type in "Subtext". In the "link" field click on "Insert Link" > the Sitecore tree will open > select one of the existing College icons at the bottom of the tree. > Save

Create a Spotlight Promo List

- 19. Put your cursor on the top level of your demo Portal > right click > insert > select Spotlight Promo List
- 20. Name it something logical just no symbols or characters > Save
- 21. Put your cursor on the Spotlight Promo List you created > right click > insert > Spotlight Promo
- 22. The name you give the Spotlight Promo is the name that will appear as the link so make sure reads how you want it to. You can use Display Name to add characters or symbols

Bachelor's Degree Specific information for undergraduate students Master's and Specialist Specific information for master's and specialist candidates Doctorate Specific information for doctoral candidates Law Specific information for those earning a Law degree

- 23. If you want to point to a link that is outside of Sitecore, you will need to put your cursor on the Spotlight promo > right click > insert link
- 24. Click on Insert External Link or Media Link or Mail link and create your link > Save
- 25. If it is an internal link you can skip steps 5-6.
- 26. Put your cursor back on the Spotlight promo you created > upload a 221x101 image from the Media Library > insert a short description
- 27. On the Target Item point to your internal link that exists or the one you just created
- 28. When complete > Save
- 29. To create 2-3 more Spotlight Promos, repeat steps 3-10
- 30. Once all of your Spotlight Promos are created, put your cursor back on the top level of the Spotlight Promo List > Edit > Edit
- 31. At the top, give the Spotlight Promo List a name in the Spotlight Section Title field
- 32. In Spotlight Items find the spotlight promos you created (red heart icon) and use the arrow to move the items over to the right. No dotted line separator is needed. Put them in the order you want them to appear > Save



Create Three Lists of Links

Boise Coeur d'Alene College of Law » May 5, 2010 » May 10, 2010 » May 15, 2010 Idaho Falls Moscow Save the Date » May 6, 2010 » Winter Commencement Dec. 12, 2009 » May 15, 2010 » May 15, 2010

- 33. Put your cursor back on Demo Portal, right click > insert > "List of Links". When the box comes up, when the box comes up, Name it lowercase, no spaces > Display Name > rename it with spaces, caps, etc. > OK > Save. Not that the Display Name is what will appear as the title of the List of Links (rose-colored type).
- 34. Put your cursor on the List of Links object you just created > right click > insert > "Link". When the box comes give it a logical name (note that the name will appear as is on the list so do a Display Name if you want it to appear differently). An open field box will come up on the right hand side of your screen. Insert an internal, external, media or mail link > OK > Save
- 35. Create 2-4 more links by repeating Step 34
- 36. Create Two More Lists of Links repeating steps 34-35

Create One Related Links

- 37. Put your cursor back on Demo Portal, right click > insert > "Related Links". When the box comes up, when the box comes up, Name it lowercase, no spaces > Display Name > rename it with spaces, caps, etc. > OK > Save. Not that the Display Name is what will appear as the title of the Related Links in the grey box area
- 38. Put your cursor on the Related Links object you just created > right click > insert > "Link". When the box comes give it a logical name (note that the

Auditing Your Degree Applying to Graduate Academic Honors Disability Needs Receiving a Diploma December 2009 Commencement

name will appear as is on the list so do a Display Name if you want it to appear differently). An open field box will come up on the right hand side of your screen. Insert an internal, external, media or mail link > OK > Save

39. Create 2-4 more links by repeating Step 38

Create a Contact Information Object

- Put your cursor back on Demo Portal, right click > insert > "Contact Information". When the box comes up, give it a logical name with no characters or symbols > Save
- On the right side of your screen, a series of open fields will appear. First step
 is to create an e-mail link so ... put your cursor back on the "Contact" object
 you just created > right click > insert > "link". When the box comes up, give
 it a logical name with no characters or symbols > OK
- 3. You will be in the link dialogue box and see an open field on the right of your screen. Click on "Insert Mail Address Link" and a box will come up with four empty fields. Tab down to the second field "Mailto" and type in an email address > OK > Save
- 4. Put your cursor back on the Contact object you just created and the fields on the right should be visible and editable. Start at the top and begin inserting the copy (use "Tab" key to get to the next field)...
 - a. Heading: Your Name and Title
 - E-mail: Click on the empty field and the Sitecore tree will come up scroll down to your unit's page, the Portal you created (expanding the "plus signs" all the way through), find your Contact Information object and the green circle with a check mark Link icon and select it.
 - c. Address 1: Insert your address
 - d. City: Moscow
 - e. State: Pull down to Idaho (just start typing Idaho and it will come up)
 - f. Zip: Insert your Zip code
 - g. Insert phone, fax, toll free number
- 5. After you have filled in the fields > Save

Create One Rich Text Object

- 6. Put your cursor back on Demo Portal, right click > insert > "Rich Text". When the box comes up, give it a logical name with no characters or symbols > OK
- 7. On the right side of your screen you will see the Editor. Click on "Show Editor" and the Editor dialogue box will come up. Insert some text --play with formatting, bolds, itals. Note that bullets often do not look good in Rich Text objects and you might want to use the line separator as an alternative for breaking up text
- 8. Accept > Save

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Students with Disabilities

Those requiring registration assistance should make their needs known by prior arrangement. Alternate arrangements can also be made regarding inaccessible classrooms and other disability-related access needs. Contact Gloria R. Jensen, Coordinator of Disability Support Services, Idaho Commons, Room 333, (208) 885-7200, or e-mail sds@uidaho.edu.

Adding in a Dotted Line Separator

 Put your cursor back on Demo Portal, right click > insert > Dotted Line Seperator. When the box comes up, give it a logical name with no characters or symbols > OK

Pulling it All Together... Populating your Portal

Refer to the Portal Screenshot/Call Out Handout as a resource

- 10. Put your cursor back on the Demo Portal you created go up to your ribbon and click Edit > Edit
- 11. On your right you will begin to populate the left and right columns. Follow these steps:
 - a. Under <u>Feature Promo</u> click on the drop down menu and find your Small Flash Feature in the tree and select it
 - b. <u>Top Left Column</u>: Go to the box on the left side and expand the University of Idaho tree scroll down to your unit and the Demo Portal you created find one of the "List of Links" you created. Select it. Click on the arrow and you'll see the List of Links object appear in the box on the right
 - c. <u>Top Middle Column</u>: Go to the box on the left side and expand the University of Idaho tree scroll down to your unit and the Demo Portal you created find one of the "List of Links" you created. Select it. Click on the arrow and you'll see the List of Links object appear in the box on the right
 - d. <u>Top Right Column</u>: Go to the box on the left side and expand the University of Idaho tree scroll down to your unit and the Demo Portal you created find one of the "List of Links" you created. Select it. Click on the arrow and you'll see the List of Links object appear in the box on the right
 - e. <u>Bottom Left Column</u>: Go to the box on the left side and expand the University of Idaho tree scroll down to your unit and the Demo Portal you created find the 116 promos you created. Select one at a time. Click on the arrow and you'll see the 116 objects appear in the box on the right. To change the order use the up and down arrows. You may want to put your dotted line separator between each of the 116 promos if you feel the spacing warrants it.
 - f. <u>Bottom Right Column</u>: Go to the box on the left side and expand the University of Idaho tree scroll down to your unit and the Demo Portal you created >
 - i. Find the 187 promo you created. Click on the arrow and you'll see the 187 object appear in the box on the right >
 - ii. Find the Rich Text you created. Click on the arrow and you'll see it come up on the right.
 - iii. Find the Contact Information you created. Click on the arrow and you'll see it come up on the right.
 - iv. You may want to put your dotted line separator between the three if you feel the spacing warrants it.
 - g. <u>Left Column</u>: Go to the box on the left side and expand the University of Idaho tree scroll down to your unit and the Demo Portal you created >
 - i. Find the Action Item you created. Click on the arrow and you'll see it come up on the right.
 - ii. Find the Spotlight Promo List you created. Click on the arrow and you'll see it come up on the right.
 - iii. Find the Related Links you created. Click on the arrow and you'll see it come up on the right.
 - iv. You may want to put your dotted line separator between the three if you feel the spacing warrants it.
 - h. Save > Mark to Publish

Previewing your Portal...

To preview what you created, put your cursor back on the Demo Portal you created. Go up to the ribbon > Publish > Preview and a new window will open and you can view the Portal.

- i. An alternative way to look at your site is to go to http://sitecore.uidaho.edu/[unit][demo]
- j. If you question what the url is look at the Quick Info of the site and "Item Path" after "University of Idaho" that is what you would type after the sitecore.uidaho.edu/