

Atlas Tool – Add It – Adding a Document



THIS WEBPART ALLOWS THE USER TO ADD INFORMATION FROM JUST A SINGLE SOURCE.

Which workspace do you want contribute to?

2

Search workspace by name

- Communications
- Document Templates
- Eccles Wealth Management Bank Atlas Implementation
- Eccles Wealth Management M365 Adoption Program
- Eccles Wealth Management M365 Security Assessment
- Eccles Wealth Management MSA
- Eccles Wealth Management SO for ACM Engagement

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Page Document Event Item External Insight

How to add content within a workspace?

1

Click on the Add It Button
- This will open the Add It webpart

2

- Select a workspace
(based on the site structure setup)
- Or use the search to narrow down results

3

What do you want to add?
- Select the type of content you wish to add
(based on the site structure setup)
- Choose Document

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4

Now, choose the type of content:

File Item

5

Great, nearly there. If there is more than one option, select your preferred list here:

Documents

6

Upload the document:

Browse

Cancel

Submit

Choosing the type of content

4

Choose the type of content:
- This will default to File Item

5

Preferred List:
- Site Pages is the default
- If you have created multiple libraries in your workspace, you'll be able to choose the specific library

6

Choose the document:
- Select browse to locate the document you wish to add

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Upload the document:

Browse 3.X_QRG_Atlas_ConneX_Card.pdf ×

What folder would you like to add your document to?

- Documents
- General

Where to add the document

7 Choose the file location you would like the document to be saved in

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8

Tag the content:

Title *

3.X QRG Atlas ConneX Card

Primary Author(s)

Contributing Author(s)

Last Author

Information Type *

Guide ×



Location *

London ×



Department *

Customer Success ×



How to Tag the content

8

Tag the content:

- All fields marked with a * asterisk are mandatory

Mandatory fields are:
Title; News Type; Date;
Location; Department

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This step is very important it allows you to specifically tag your content in a variety of ways. Making it easier to locate your document/article etc

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9

Entity *

Activity *

Subject *

Reference

Reference Date

Status

10 Would you like to publish the document after uploading?

How to Tag the content & Submit

9

Tag the content with Metadata:
 - All fields marked with a * asterisk are mandatory

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This step is very important it allows you to specifically tag your content in a variety of ways. Making it easier to locate your document/article etc

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Would you like to publish after uploading?
 - Select Yes or No
 - Select Submit