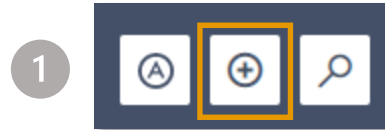


Atlas Tool – Add It – External Insight



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

3

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 External Insight

Atlas Tool – Add It – External Insight

4

Now, choose the type of content:

External Insight

5

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

External Insights

6

Paste the article's URL:

<https://www.bbc.co.uk/news>

Next

Choosing the type of content

4

Choose the type of content:
- This will default to External Insight

5

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

6

Paste the articles URL:
- Copy the URL into the space
- Select Next

Atlas Tool – Add It – External Insight



Home - BBC News

Title *

Home - BBC News

Summary *

Visit BBC News for up-to-the-minute news, breaking news, video, audio and feature stories. BBC News provides

Thumbnail optional

Choose a different thumbnail by entering a URL

<https://m.files.bbc.co.uk/modules/bbc-...>

7

Next

Changing the External Insight Information

If the External Insight information needs amending use this area to do so.

- Title
- Summary
- Thumbnail image

7

- Select Next

Atlas Tool – Add It – External Insight

Tag the content:

8

Title *

Home - BBC News

External Insights Type *

URL *

https://www.bbc.co.uk/news

Summary *

Visit BBC News for up-to-the-minute news, breaking news, video, audio and featur...

Image



Change

Date

Location *

Locations X

How to Tag the content

8

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

i

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

Atlas Tool – Add It – External Insight

9

Department *

Customer Success ×

Entity *

Internal ×

Activity *

Internal ×

Subject *

All Know How ×

Cancel Submit

How to Tag the content

9

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

i

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

10

- Click Submit