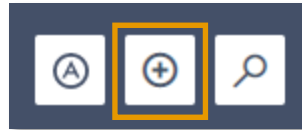


Atlas Tool – Add It

1



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 Page

Atlas Tool – Add It

4

Now, choose the type of content:

News Page

Landing Page

Knowledge Page

Location Page

5

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

Site Pages

6

Choose the visual layout style (template):

Communication Landing Page

Knowledge Landing Page

Knowledge Page

Location Page

News Page

Choosing the type of content

4

Choose the type of content:
- Which type of page for example

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 visual layout style:
- Select which visual layout e.g. Knowledge Page

7

Atlas Tool – Add It

Tag the content:

Title *

Primary Author(s)

Contributing Author(s)

Last Author

Date *

Information Type *

Location *

Department *

How to Tag the content

7

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

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

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 document/article etc

Atlas Tool – Add It

8 Entity *

Demos ×

Activity *

Demos ×

Subject *

All Know How ×

Reference

Reference Date

12 PM 00

Status

9

Cancel Submit

How to Tag the content

8

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 document/article etc

9

- Click Submit