

How do I publish a document and add metadata to make it searchable?

This training document has been developed to support publishing authors with adding documents and metadata (ex. tag words, dates, health topics) to ePOPS.

For resources on editing the website: [Web Editor Hub](#)

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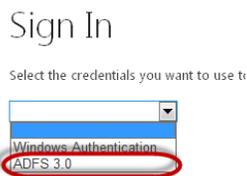
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The Resource Gallery

The "Resource Gallery" is the backend library where documents are stored on ePOPS. Access to the Resource Gallery is determined by the Policy Office.

1. Save the link as a favourite in your web browser:
<https://editpolicyandorders.phsa.ca/resource-gallery/Documents/Forms/AllItems.aspx>

2. Sign In to the website by selecting the **ADFS 3.0** credentials in the dropdown menu. This is connected to your network account so you will not need to enter a username or password.



Folders in the Resource Gallery

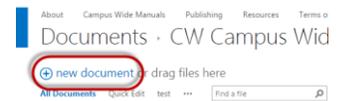
As a publishing author, you will be assigned **one** folder in the resource gallery to file your documents. To start publishing documents, select the folder that you have been assigned to by the Policy Office.



Adding One Document (the long way)

There are two ways to add a document to ePOPS: the long way and the short way. The long way is ideal for adding one document or replacing an old document. After opening your folder in the Resource Gallery:

1. Select new document

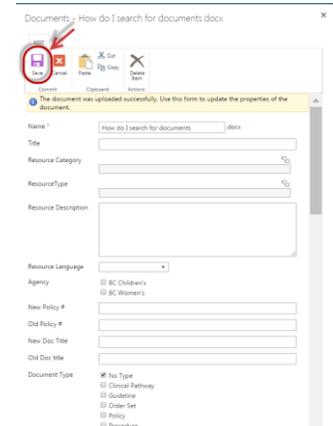


2. Choose a file you want to upload from the file location on your PC and select OK



Note: You do not need to identify a destination folder or add comments.

3. Enter the supporting metadata fields in the eform. You do not need to fill out every field, however at a minimum fill out the following:



- Title
- Agency
- Document Type
- Health Topic
- Campus Wide Manuals (if applicable)
- Tag Words
- Effective Date
- Document Owner
- Document Status

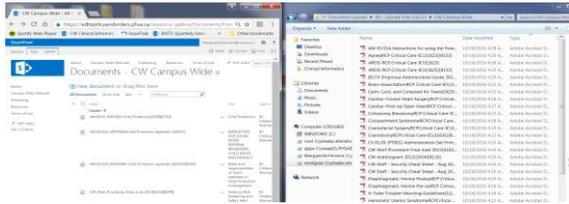
Note: for more details and definitions on these fields, refer to the Style Guide

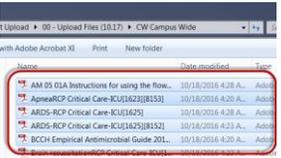
Select Save when complete at the top of the eform

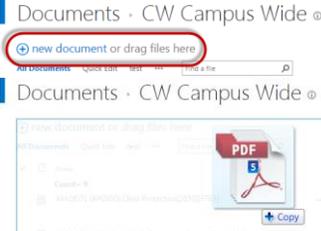
Adding Multiple Documents (the short way)

When you have multiple documents to add to the Resource Gallery, you can use short way of uploading documents.

1. Open your folder in resource gallery AND Open the file location on your PC where the documents you want to upload are located

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- Select the documents you want to upload in the file location


- Drag the selected files with your mouse to the area of the Resource Gallery that says "new document or drag files here"

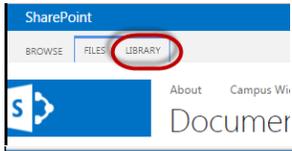


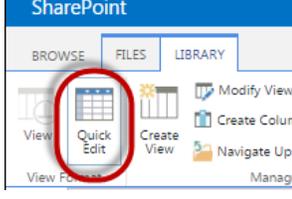
Note: The short way does not have an option to add metadata fields. Metadata must be completed after the documents have been uploaded.

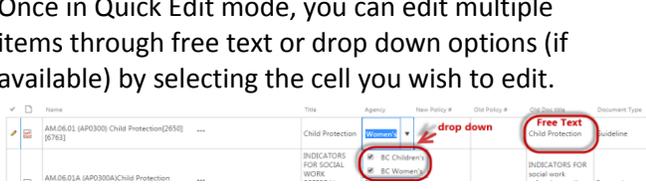
Adding Metadata (Quick Edit)

Metadata can be added or modified through a Quick Edit option. The Quick Edit option is ideal for adding or modifying metadata fields for multiple documents. Start by opening the folder that you have been assigned to (if not already open from adding documents).

- In the top left hand of the Resource Gallery, **select the Library tab**. This will open the banner bar.

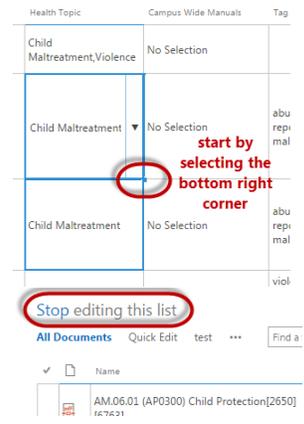

- Once the editing banner bar is open, **select Quick Edit**. Quick Edit allows you to manage the documents as items in a spreadsheet format (similar to excel).


- Once in Quick Edit mode, you can edit multiple items through free text or drop down options (if available) by selecting the cell you wish to edit.



4. To make bulk edits, you can select a cell and drag and drop it to corresponding cells so that the items have the same metadata

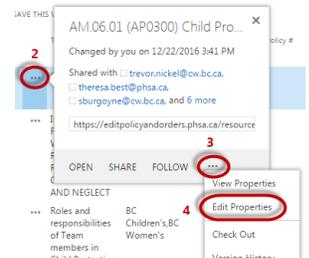
5. When you are done making edits in the Quick Edit mode, scroll to the top of the list and **select Stop**. This will automatically save your changes



Adding/Editing Metadata for One Document

In addition to Quick Edit, metadata can also be added to a document through the eform format, similar to the long way of adding a document.

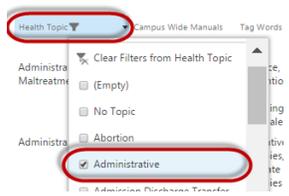
- Find the document you wish to add/edit
- Select the ellipses beside the Title
- Select the ellipses again in the Property Box
- Select Edit Properties



Using Filters

There are no sub-folders in the Resource Gallery. Documents can still be sub-categorized through filters.

- To filter documents by a column category, simply hover over the column title and select what option you wish to see


- To sort documents alphabetically, hover over the column and select "A on Top" or "Z on Top"



Note: Filters can also be used in Quick Edit mode.