Content Explorer User Guide

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Overview

This document contains the following information:
- New features available in Content Explorer
- Notable differences in functionality when managing folder structure and content
- System requirements
- Frequently asked questions (FAQs)

New Functionality Overview

- You no longer need to go to the Content tab in the Environment section. All of your content management tool needs are now available in Content Explorer in the content tree.
- You can now drag content items to where you would like them to display. Larger targets make the dragging easy as well as enable the dragging and deleting of multiple items.
- In addition to dragging functionality, the buttons at the top of the screen allow you to click and select, thus providing a way to move content items while eliminating track-pad issues on laptops.
- Larger fonts and a more open design increase readability, especially when projected for a group.
- A more responsive folder system streamlines organizational tasks.
- Explanatory tooltips on buttons and links that appear upon hover provide easy reminders of functionality.
- You can easily move items into and out of the Deleted Content folder.
- The search function has been improved and added to Content Explorer, so now you can use the new Content Explorer functionality in search.
- You can now print a quick list of all the content in any folder.
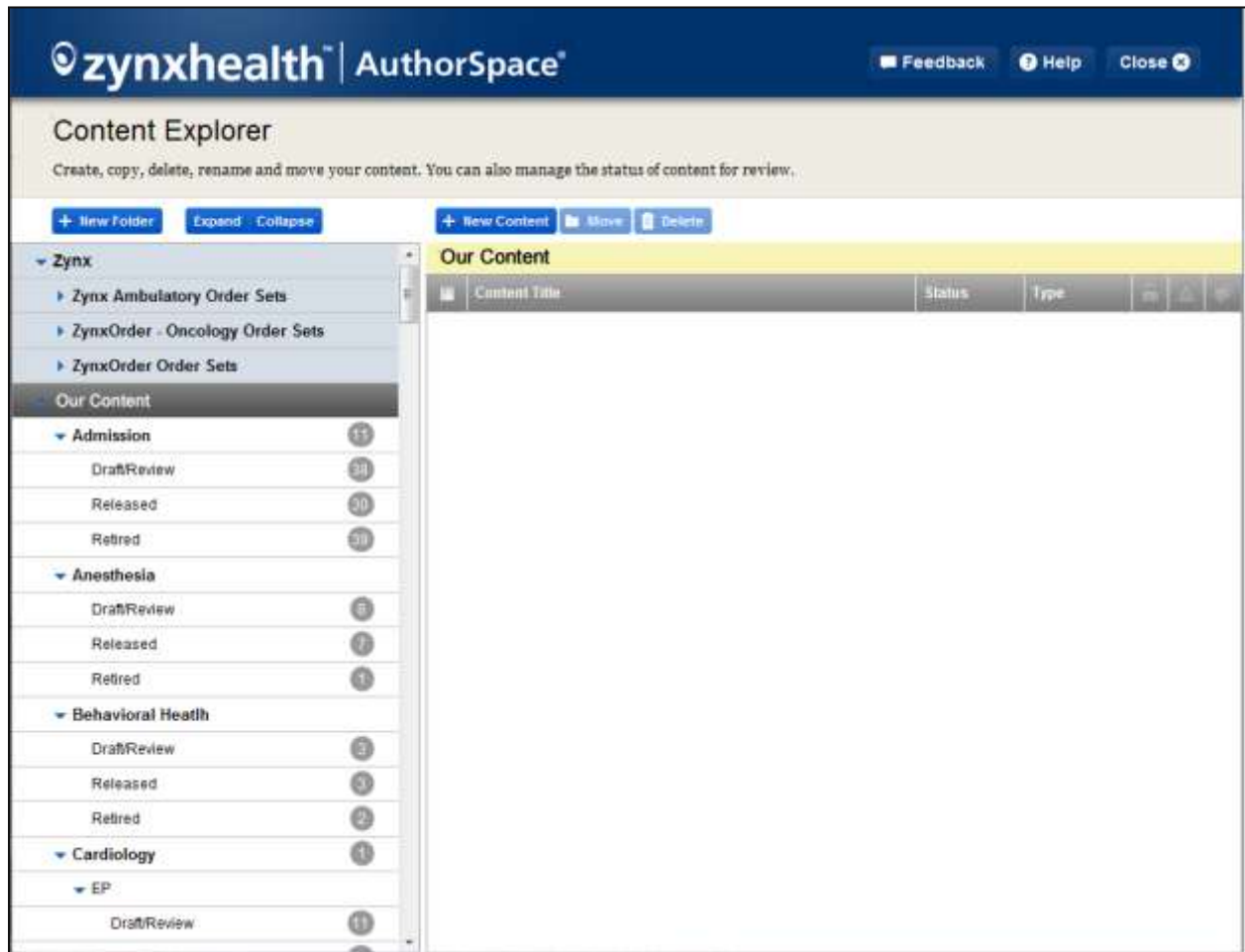
Using Content Folders

Order Set and Plan of Care content is contained in folders on the left side of the page, as shown below. Zynx content cannot be moved, edited, or deleted, but it can be duplicated into your own custom content folder. The folder is named "Our Content" by default, but it can be renamed. Zynx folders have a light blue background to indicate they cannot be moved or changed, while your custom content has a white background and anything within the "Our Content" folder can be edited, moved, or even deleted, based on permission level.
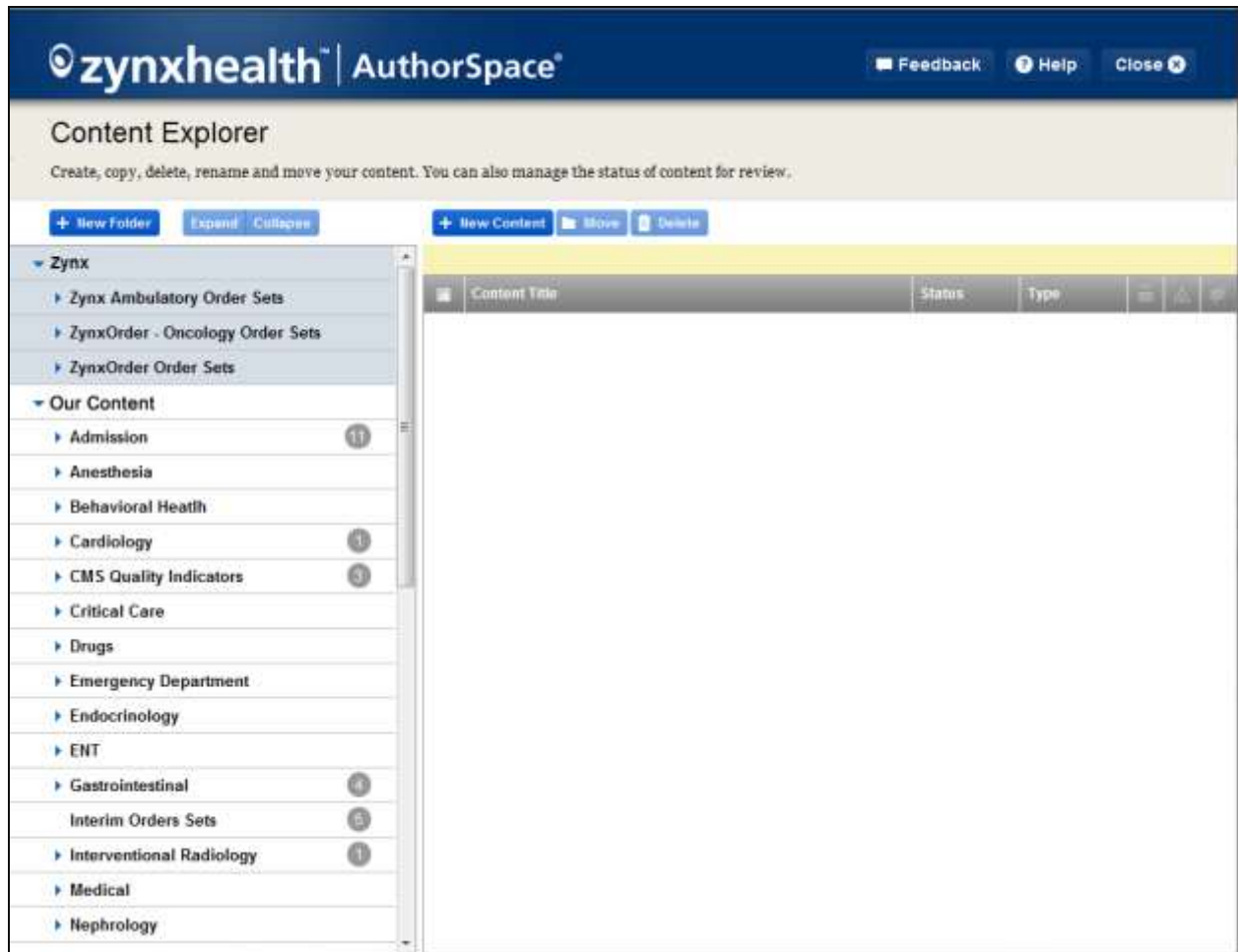
To open a folder in the content tree, simply click anywhere in the folder area. Each folder has a number in a gray circle that indicates the number of content items inside that folder. Note that any content contained in subfolders within that folder are not included in the number of items, the number represents only the content items in the immediate level of the folder.

To add a new folder, select the folder within which you would like to place that folder. Click the "New Folder" button above the folder list. A new folder is created with the default name "New Folder" and is highlighted for you to provide a name. Hit "Enter" or click away from the folder to complete the action. Folders cannot be added to the "Deleted Content" or "Zynx" folders.

You can re-organize folders by moving them into or out of other folders. Simply drag a folder to the place where you would like it to be. If you drag a folder over a collapsed folder and hold it for a moment, the destination folder will expand, allowing you to drop the dragged folder into a subfolder. Note that each folder on the same level within a folder must have a different name. Selecting any folder with subfolders and then clicking "Expand" will open all the subfolders only under that folder. The Collapse button also works only for a selected folder. See expanded view below.


Deleting Content and Renaming Folders

To delete any folder, click on the trash icon on the right side of the folder area. This icon only appears when you hover above it (see screenshot below). Note that you cannot delete folders that contain content; you will be prompted to move or delete the content before you will be able to delete the folder.

Remember that neither folders nor content can be deleted or moved from the Zynx folder or from the Community or Related folders, if you have them in your environment. If you do not have permissions set to delete content, these options will be disabled. All content management permissions remain the same as in the old content management functions; if an action is unavailable to a user, it will appear disabled (ie, the buttons appear faded and links appear gray).

To rename a folder, double-click on it. The name will be highlighted and editable, as shown below. When you are done renaming, hit enter or move away from the box to save the new name.
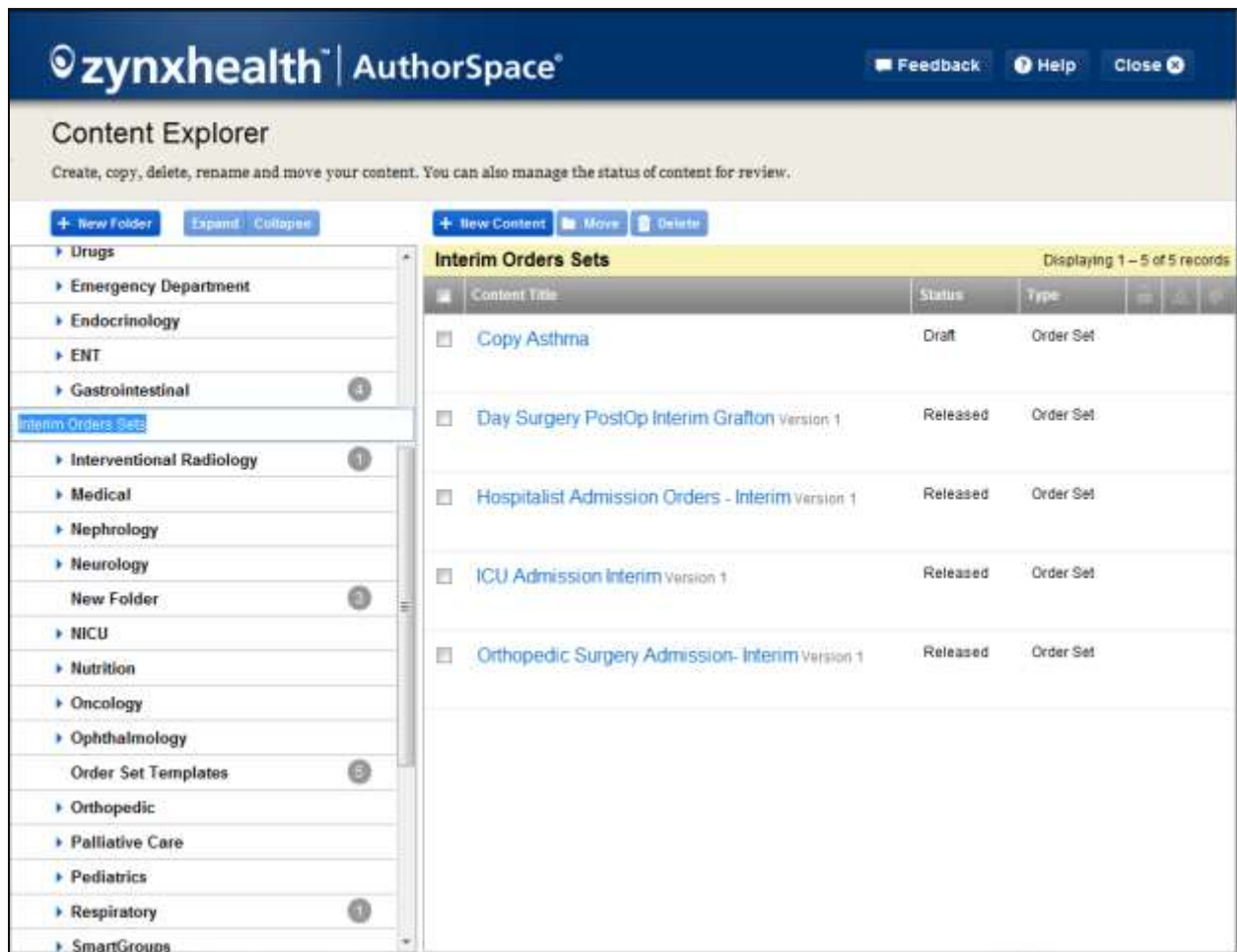
Working in the Content Grid

Content within a folder selected on the left is displayed in the grid on the right side of the page. A button to create new content and buttons for bulk operations appear above the grid. The grid header displays the name of the selected folder.

Up to 50 content items within any folder will be displayed without pagination; folders with more than 50 items will display a simple pagination navigation at the bottom of the grid (see screenshot below).

To see the actions available for any item, hover over the row and the actions will appear under the title (see screenshot below). To view the content, click on the title. If you have the appropriate permissions, you can also change the title in the grid by double-clicking on the content title.
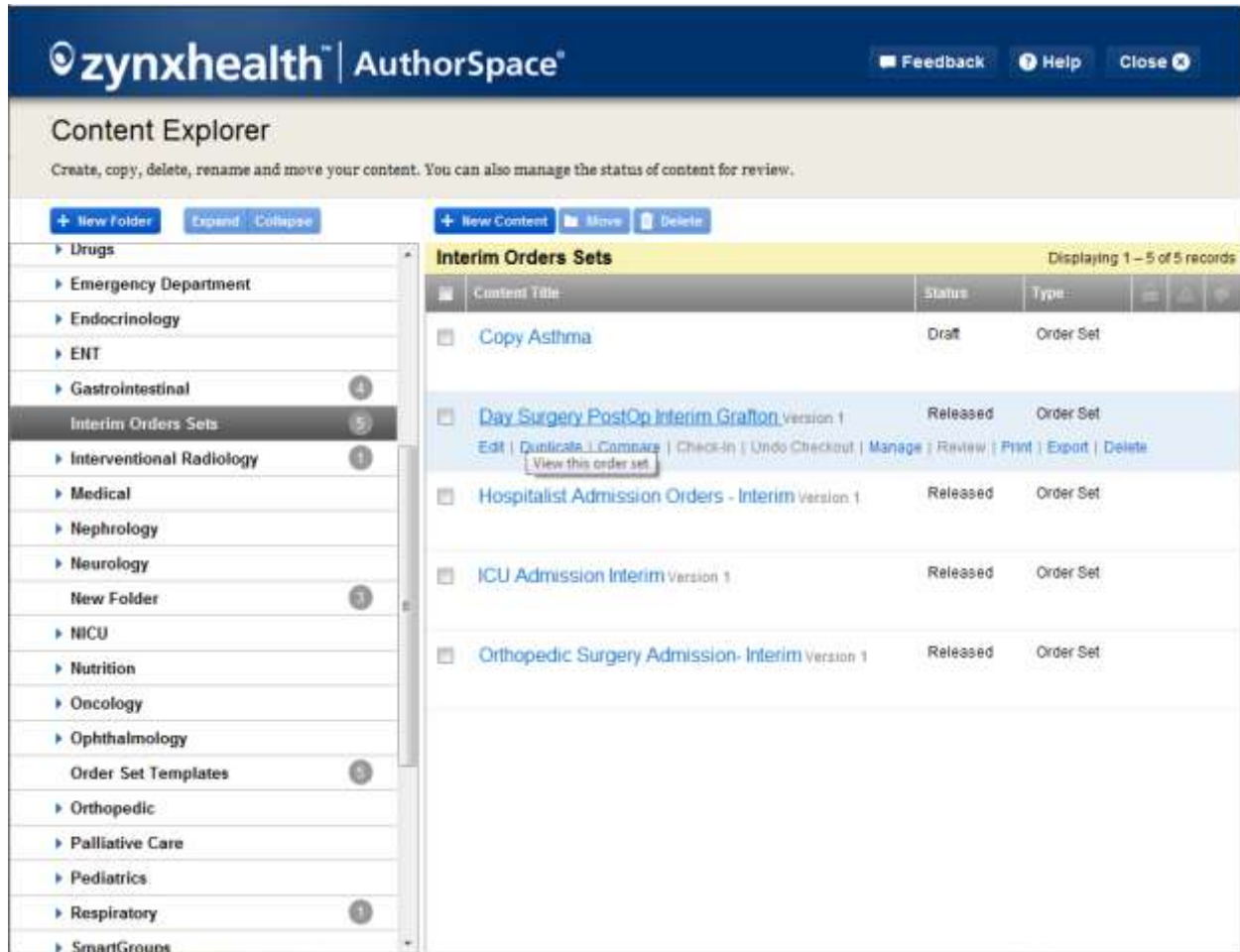
Grid Actions

If there are a large number of items in a folder and you are looking for specific content, or you would like to view the content in a folder differently, you can easily sort and filter items.

By default, content is sorted alphabetically. Clicking on the header will reverse the order. When you hover over a header, an arrow appears. Clicking on that arrow will bring up ascending and descending sort options as well as a filter option, allowing you to sort by a word or partial word string for the title column, or by status or type. When a filter is applied to a column, the header on that column turns blue, as shown below.
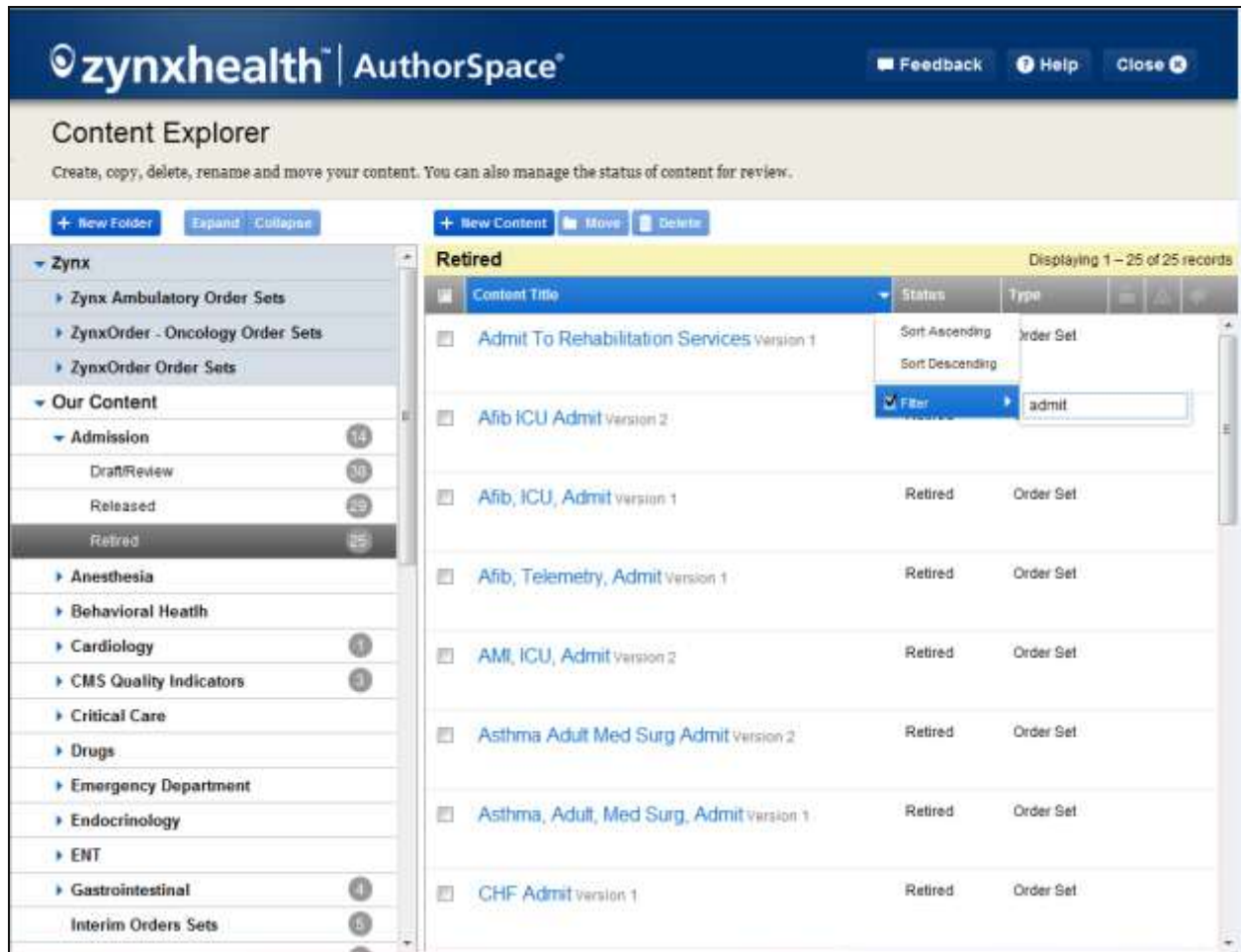
On the right side of each row is space for three icons: a lock to indicate that an item is checked out and cannot be edited; a red alert sign to indicate a content issue that must be resolved; and a quote balloon icon to indicate that a content item has been published to ViewSpace.

Explanatory tooltips are provided for buttons and action links throughout the application. If you need a reminder of what a particular action does, hover your mouse over the button or link.

Moving and Deleting Single and Multiple Content Items

You can organize content from the grid by deleting or moving it.

To move a single item, drag it into any custom content folder. To move more than one item at a time, select the desired content items by checking the box at the top left of each row and drag all the selected

content items at one time into any folder. While dragging, a green check icon appears when you are hovering over an acceptable folder and a red icon appears when you are hovering over a folder to which you cannot move content (see screenshot below). Note that all of the content in a folder can be selected at once by checking the box in the first header.
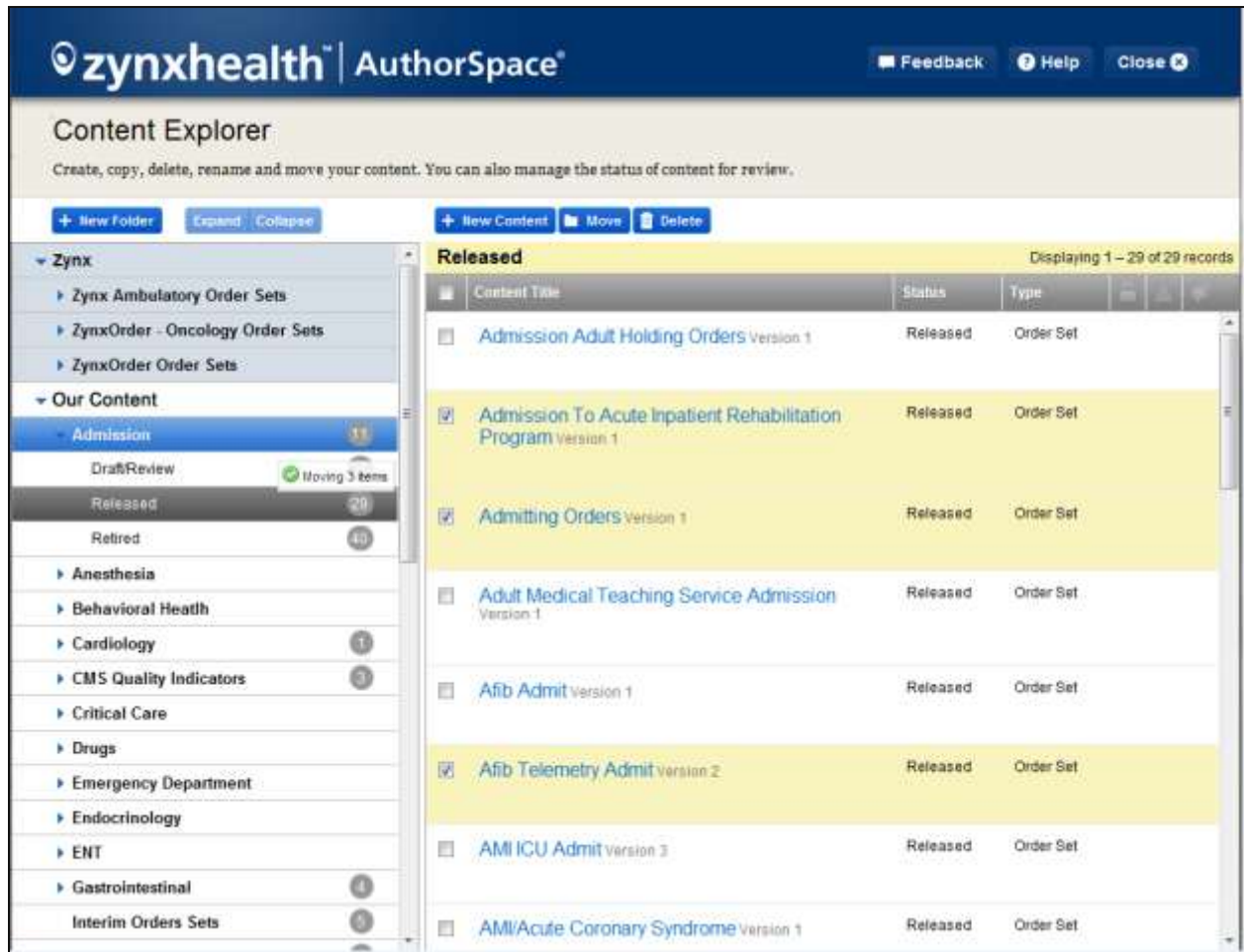
You can also move items without dragging. Check the box next to one or more items, select the destination folder, and then click the "Move" button above the grid. Complete the move by clicking the "Move" button in the drawer that opens.

Similarly, you can delete one or more items by either dragging them into the "Deleted Content" folder (always the last folder in "Our Content" with a dark background) or selecting the items and then clicking the "Delete" button above the grid. When deleting an item, you will always be asked to confirm the deletion. To undo a deletion, drag the item or items out of the "Deleted Content" folder into a custom content folder. Items in the "Deleted Content" folder remain there indefinitely and can be restored at any time.

When moving and deleting single or multiple items, the folder list on the right will not change; you will remain in the current folder until you choose another.

Duplicating and Creating Content

To duplicate a content item, select "Duplicate" from the actions in the item row. The title field will be filled out by default with the name of the order set (if it is custom content, the title will be prepopulated with "Copy of [title]"). Select a module, if desired, and a destination folder if it is different from the current folder. The grid refreshes to the folder where you placed your new item, showing your new item as selected (see screenshot below).
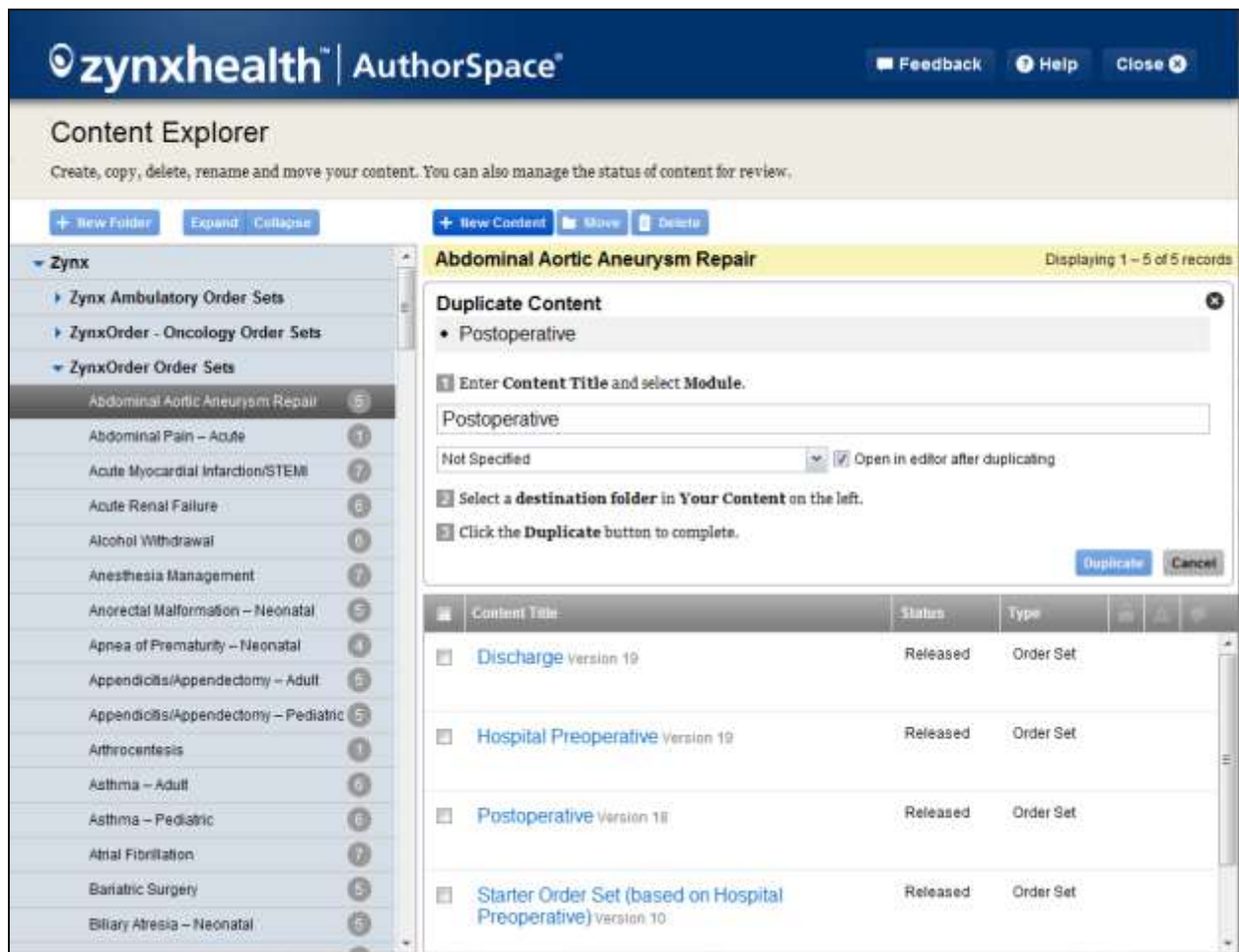
Similarly, to create a new content item, a window will appear in the same way it does for duplicating content as above, and you can click on the "New Content" button above the grid. Enter the content title, and select the type of content (defaults to order set), and then select a Module if desired. Select the

destination folder from the left and click "Create". The grid refreshes to the folder where you placed your new item, showing your new item as selected.

The Edit, Compare, Manage, Review, Print, and Export links are available under the content title, when you click on the links it opens a separate window with the functionality which enables you to complete the action.

☐	Content Title	Status	Type	🔒	⚠	💬
☐	BH_AL Base Activity Diet Vital Sign etc Orders	Draft	Order Set			
	Edit | Duplicate | Compare | Check-In | Undo Checkout | Manage | Review | Print | Export | Delete					

Searching Content

You can now search for content directly from Content Explorer. This includes Zynx content, custom content, and deleted content. If you have related or community content, those folders also can be searched.

The new search box is located at the top right of the grid. Note that this box will allow you to search within a folder you have *currently* selected. For example, to search all your custom content, select your custom content folder. Begin entering your search term and you will notice that results appear live in the grid after you have entered at least 2 characters.

The search results will stay in the grid until you clear the search box. You can move, delete, rename, and perform all functions from a folder view on the search results, according to your user permissions, as detailed elsewhere in this guide. If you select another folder while your term is still in the search box, search results for that folder will be displayed. To clear the search box, select your term and hit delete, backspace from the last character, or click the gray X in the box.

The wildcard search using the characters "%%" remains available. You could use this to display the content of all folders within your environment (excluding deleted, related, and community content).

Advanced Search

You can use the Advanced Search feature to search within Zynx content. You can use this with a string or simply select a venue and/or event with no search term and click the button to see all content that matches your criteria. The Advanced Search link will change to white on a blue background to indicate that you are in advanced search mode; click it again to return to standard search or to browse by folder.
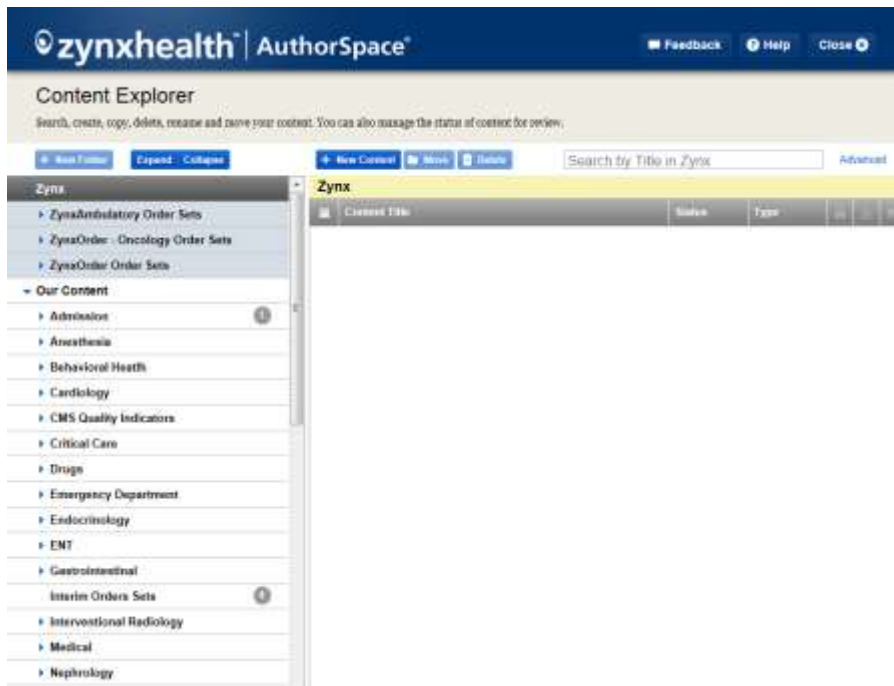
Printing Folder Contents

You can obtain a quick printout of all the content from any folder. Click on the print icon located at the top right of the content grid. A print-formatted version of all the content from the *currently* selected folder (ie, not subfolder content) will pop up. Then print this list from the browser.
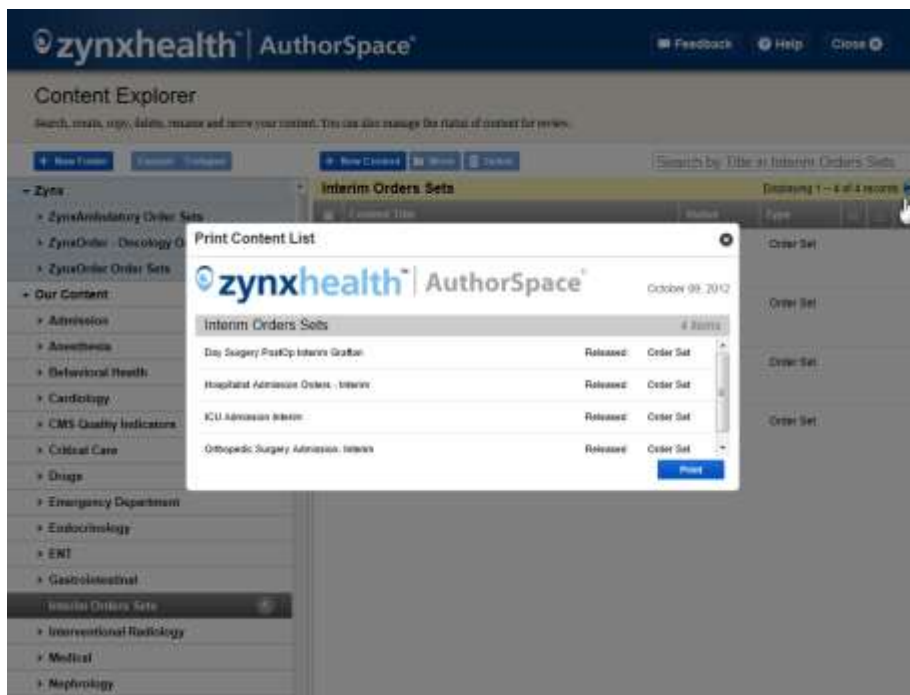
Notable Differences When Managing Folder Structure and Content

Content Explorer improves the ease of use and reduces or in some cases eliminates several difficult tasks in AuthorSpace. Content Explorer provides a one-stop shop for content management, making it easier for you to maintain and manage your content. With the new functionality, you can now drag and drop content, perform the same action on many pieces of content simultaneously, and more easily create and manage content.

- ➢ **Moving content in bulk via drag and drop**
  It is now possible to move one or more pieces of content from one folder to another in a single step. Content Explorer also supports selecting multiple pieces of content and dragging (or selecting the move button) them into a new folder.

- ➢ **Creating new folders and content in the same place**
  Previously, creating a folder required accessing the Control Panel. Now, new folders can be created in any location inside your custom content folder with a single click. Folders can be dragged and dropped into other folders as well. It is possible to create a new folder and create new content in that folder from the same screen.

- ➢ **Renaming a folder on the same screen**
  Instead of using the Control Panel, you can now simply double-click on the folder, enter the new name, and hit "Enter".

- ➢ **Deleting/restoring content in bulk**
  It is now possible delete/restore one or more pieces of content. You can drag multiple pieces of content to the Deleted Content folder to delete them, and drag multiple pieces of content out of the Deleted Content folder to restore them.

System Requirements

- Content Explorer is not supported in Internet Explorer 6. Internet Explorer 9 is recommended.
- A new "Feedback" button is provided at the top of Content Explorer for users to provide feedback, make suggestions or report defects. Please leverage this feedback button we want to hear your thoughts!

FAQs

Q: Which new features and functionality are now available in Content Explorer that were not available in the legacy system?

A: Drag and drop functionality; bulk action buttons; tool tips throughout the application; access to the 'Deleted Content' folder from the content tree.

Q: What legacy functionality has changed?

A: The 'Content' tab has been removed, the functionality is now available within the content tree and other areas of the application; the 'Show Complete Activity' description for the Plan of Care check box has been moved to the 'Catalog' tab.

Q: Has functionality changed based on user permissions?

A: No. Permissions were implemented in Content Explorer exactly as in the legacy system including user level access (User, Environment manager and Zynx Admin) and team permissions.

Q: Can I delete an entire folder?

A: Yes. If you have the appropriate permissions you can delete an entire folder, but need to make sure the folder is empty or you will get the below error.
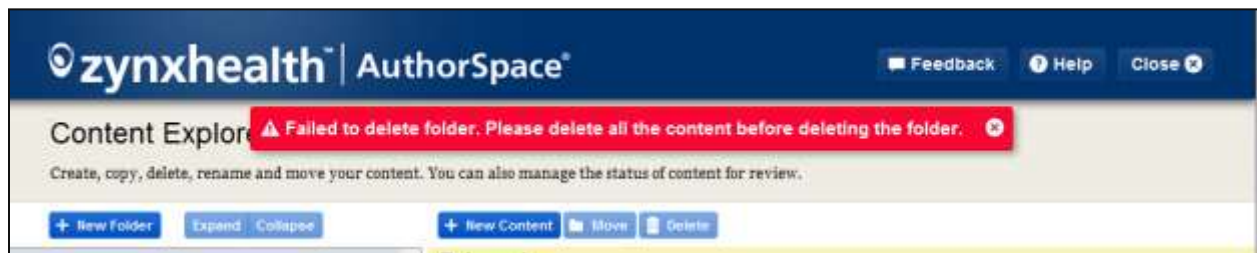
Q: Can I search for a specific item within my order sets or plans of care?

A: No, this feature only searches on the title of the content in your environment. To search for specific items within your content, use the Find-and-Replace feature found on the main AuthorSpace menu.

Q: Why isn't the Zynx content that includes my search string displaying? I know it exists.

A: Double-check to ensure that an advanced filter is not activated. You can determine if the advanced filter is being applied because Advanced will appear as a solid button instead of a link. To clear the filter, simply click the X at the right of the button.

Q: Will deleted content be included in the results of our search?

A: No. To minimize the amount of noise in the search results, we have excluded the Deleted Content folder from searches on your custom content. To search the Deleted Content folder specifically, select that folder and then enter your query in the search box:

Q: From the search results page, can anyone move order sets or plans of care from one folder to another?

A: Only those people who normally have privileges to move content will be able to move an order set or plan of care to a different folder from the search results page.

Q: Can I export the list of folder content to Excel?

A: No, but here's a tip: Click the print icon at the top right of the grid; then select and copy the list from the pop-up menu; now paste this into Excel.

Contact Us

For more information on the new features, please contact your support manager, e-mail support@zynx.com or call 1.888.333.ZYNX.