



**HR Portal User Guide:  
Managing HR Content on the NIH Portal  
A User Guide for Content Managers**



The Human Capital Group (HCG) is committed to using the [NIH Portal](#) as the NIH Intranet and is moving to provide access to Human Resources (HR) systems and HR content of relevance to NIH employees on the NIH Portal. This content will be conveyed through the Human Resources Community on the NIH Portal as well as through the Document Directory. HR content of interest to the general public or job-seekers will also be available on the [NIH Jobs website](#).

This document explains how content managers can navigate the NIH Portal and manage their own content.

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## Portlets

Portlets are the building blocks that make up each user's My Page and every Community on the NIH Portal. Portlets, also called Gadgets, provide access to different HR systems and databases. A Portlet may merely link to databases or systems, but ideally it should provide access to a piece of the functionality of the system.

Portlets are developed by software developers versed in HTML and other programming languages. HR Content Managers aren't expected to develop Portlets, but they can assist in recommending HR systems and databases to be "portalized."

Current Human Resources portlets include:

- Benefits Quick Links
- Capital HR
- eOPF
- Federal Retirement Benefits Calculator
- FEGLI Calculator
- HHS Careers (QuickHire)
- HHS Employee Search
- Human Resources News and Events
- Latest HR Documents
- myPay
- New HR SOP's posted on the portal
- Update Your Information
- Who is My HR Contact?
- WiTS Launch Pad



## Document Directory

While Portlets are the building blocks of My Pages and Communities, the Document Directory, also called the taxonomy, is the bread-and-butter of the NIH Portal. The Document Directory contains all of the documents, websites, and information that are not in a database or system. All of this content is logically organized by subject into a hierarchy of folders and subfolders. Users can browse to the folder or subfolder that contains the information they are looking for, or they can search the full-text of documents using the **Search** box in the portal header.



The Document Directory contains documents from NIH, OPM, HHS, and other sources of news and human resources information. All of these documents and websites are organized by subject in the Document Directory. The human resources content falls under the Administration branch of the taxonomy.

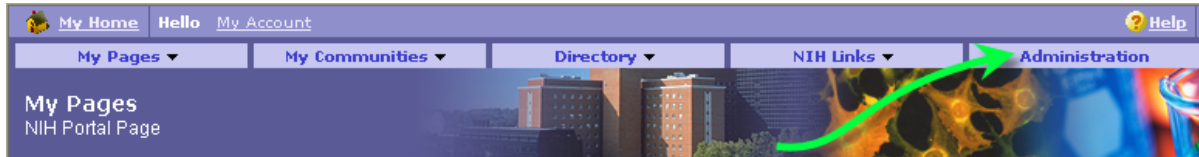


Each folder and subfolder has been assigned security so that the designated Content Manager for that subject area can approve content for that folder. The Content Manager can also delete content, change the name, or move content to another folder.

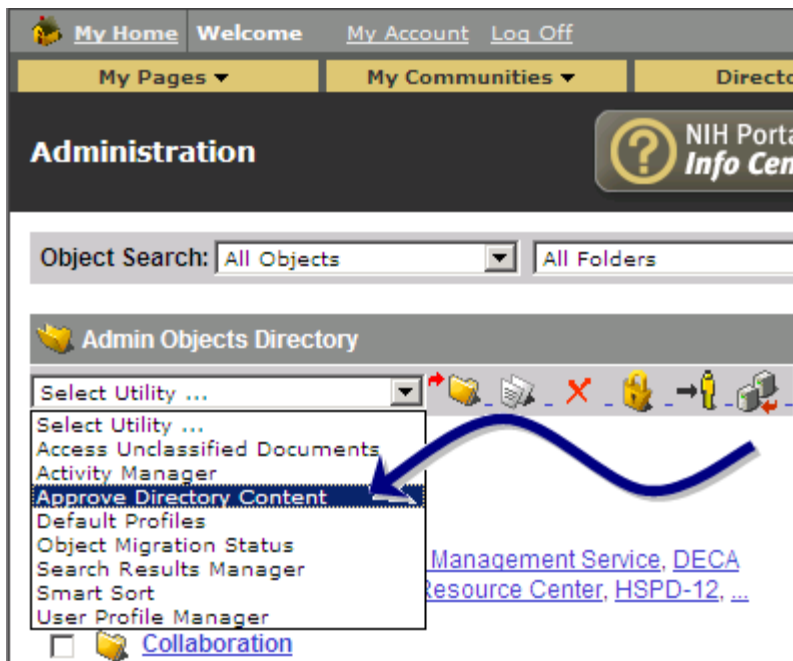
## Approval Queue

Before documents reach the Document Directory, they must be crawled into the portal. When documents are crawled into the portal, they are stored in the Approval Queue. From the Approval Queue new document cards can be reviewed and sorted into the appropriate folders and sub-folders.

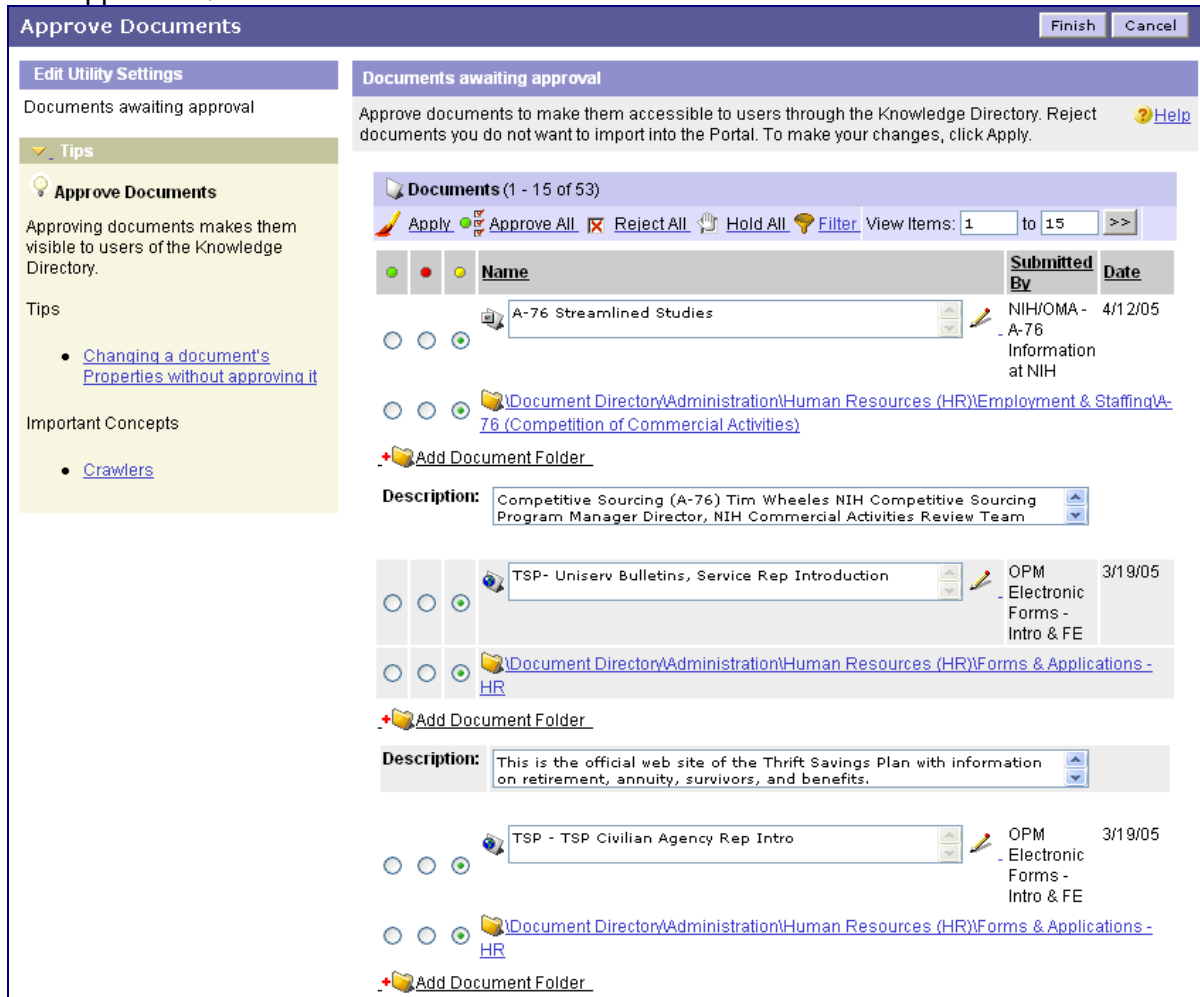
The Approval Queue is under the Administration link located at the top of the Portal Title bar.



Once you click on **Administration**, you're taken to the Portal Administration Menu. The Approval Queue is accessed by selecting **Approve Directory Content** on the drop-down menu.

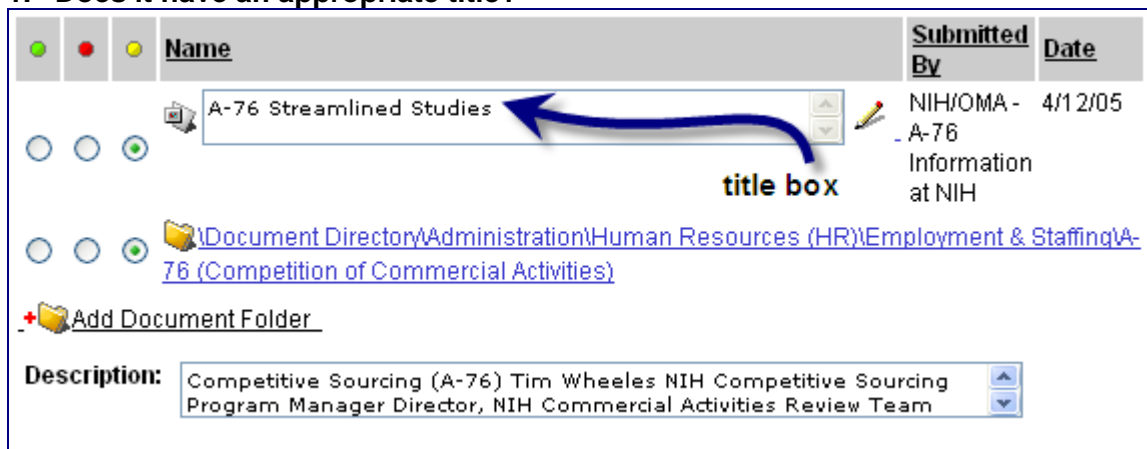


The Approval Queue looks like this:



When assessing documents for approval, there are 3 very important factors to consider: the document title, the document description, and the destination folder.

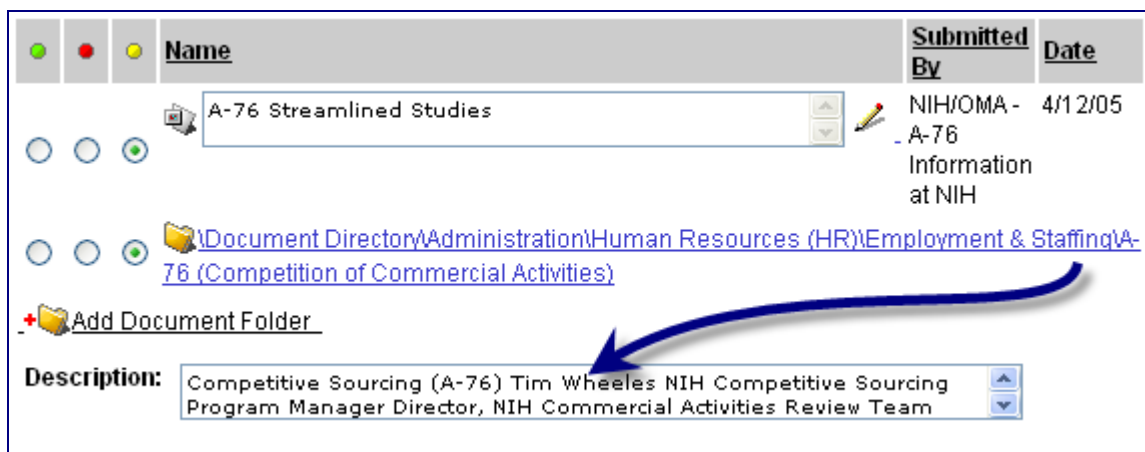
### 1. Does it have an appropriate title?



To Rename the Document simply click inside the title box and retype the title.

## 2. Does it have an appropriate description?

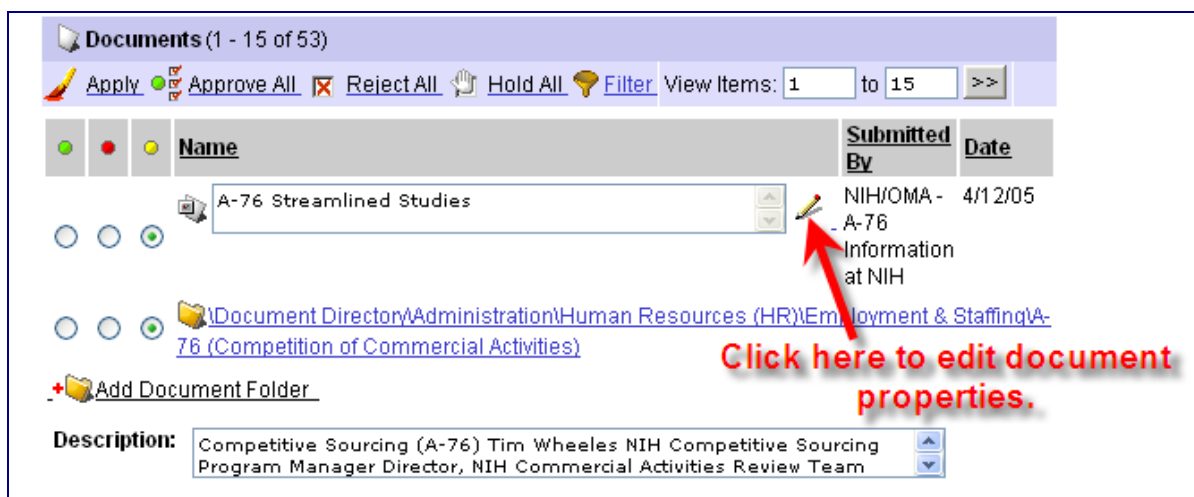
To edit a document card's description, click inside the **Description** box and start typing.



Each card should have an appropriate description and title so that it can be easily identified.

You may also want to add some keywords to your document. Having appropriate and detailed descriptions and keywords makes the document more searchable from the Document Search function.

To add keywords you must open the **Edit Document Properties** window by selecting the **Edit** icon.



This will take you to the **Edit Document Properties** window for your card.

The screenshot shows the 'Edit Document Properties' window with the following sections:

- Main Settings:** Edit the Property values for this document, change the language associated with this document, or add/delete Properties for this document.
- General Document Properties:**

Property	Value
Name	A-76 Streamlined Studies
Description	Competitive Sourcing (A-76) Tim Wheeles NIH Competitive Sourcing Prog
Crawler Tag	
Card Created	Apr 12, 2005 11:00:39 PM
Card Last Modified	Apr 12, 2005 11:00:45 PM
Open Document URL	<a href="http://a-76.nih.gov/All_Hands_Meeting_4-6-05.ppt">http://a-76.nih.gov/All_Hands_Meeting_4-6-05.ppt</a>
Plumtree Document Type ID	102
- Document Content Language:** Content Language: English
- Customized Document Properties:**
  - Buttons: Add Property, Create Property, X
  - Property Value Table:

Property	Value
Author/Originator	kfinn
Date Created	Apr 12, 2005 11:00:00 PM
URL	<a href="http://a-76.nih.gov/All_Hands_Meeting_4-6-05.ppt">http://a-76.nih.gov/All_Hands_Meeting_4-6-05.ppt</a>
- Document Information:**

Property	Value
Last Accessed Through the Portal	Apr 12, 2005 11:00:45 PM
More documents like this	
Number of times accessed	0
Popularity Count	0

If the Keywords field is not listed under the Customized Document Properties section, click on **Add New Property**.

The screenshot shows a close-up of the 'Customized Document Properties' section. The 'Add Property' button is circled in red. A dropdown menu is open, showing a list of property options. A blue arrow points to the 'Keywords' option in the list.

- Buttons: Add Property, Create Property, X
- Property Value Table:

Property	Value
Author/Originator	kfinn
Date Created	Apr 12, 2005 11:00:00 PM
URL	<a href="http://a-76.nih.gov/All_Hands_Meeting_4-6-05.ppt">http://a-76.nih.gov/All_Hands_Meeting_4-6-05.ppt</a>
Document Type	
- Dropdown Menu Options:
  - Document Type
  - Document Upload DocID
  - Document Upload Repository Server
  - Full Text Content
  - Keywords** (highlighted)
  - Obtained From
  - Originating Organization
  - Portlet Owner Email
  - Title
  - Unique Identifier

Select **Keywords** from the drop-down list. Click in the field next to the box and type some keywords.

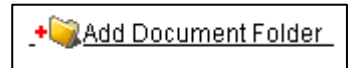
When you are finished editing the documents properties click on **Finish**.



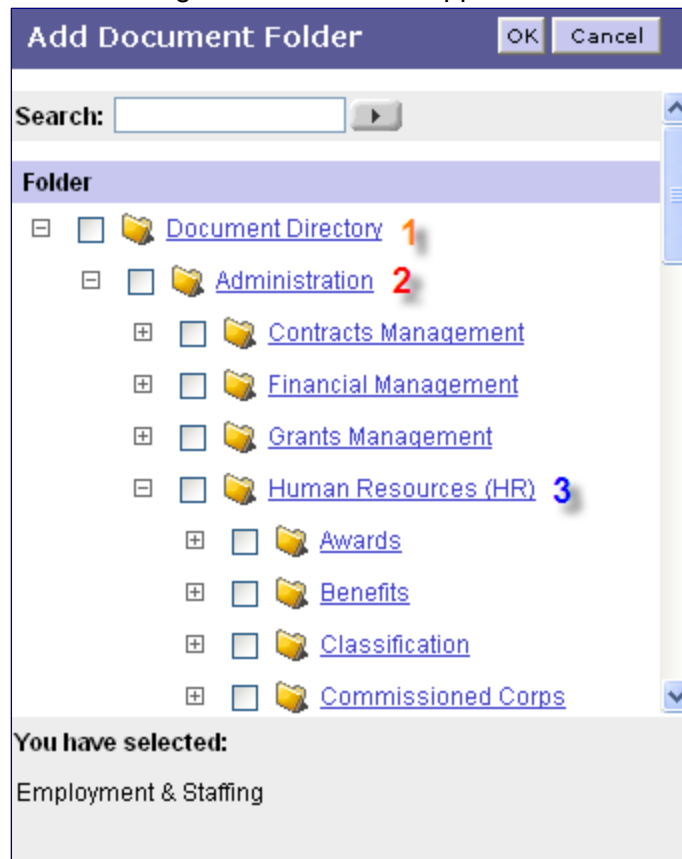
### 3. Is it being sorted into the appropriate folder?

Back in the Approval Queue, check the folder icon under the document title to ensure that the folder path is appropriate to the document content. Pay close attention to section after the last backslash.

To change the document's destination folder click on **Add Document Folder**.



The Selecting a Folder Window appears.

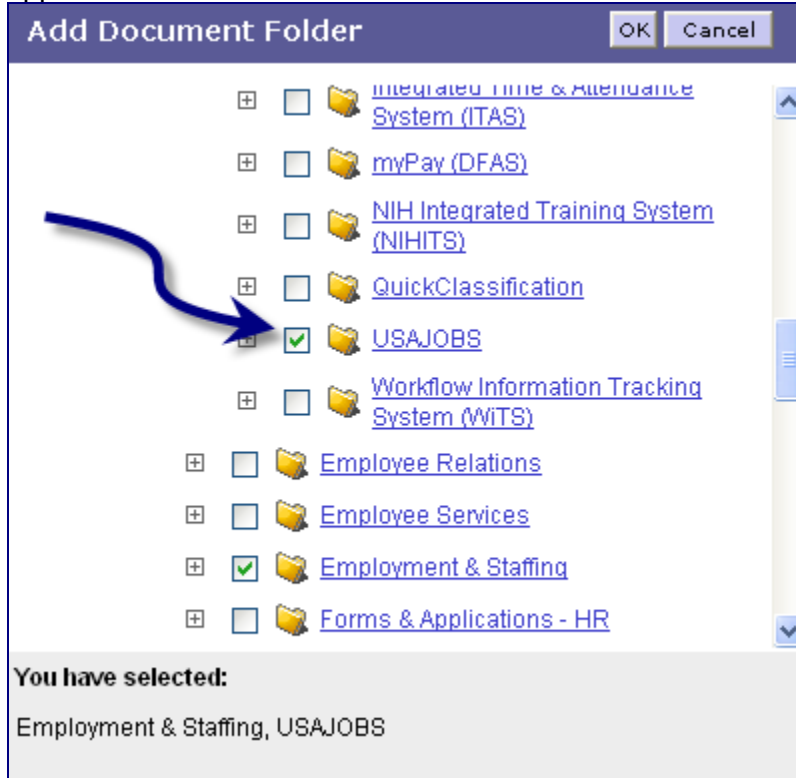


Navigate the "Add Document Folder" by clicking on the folder name or the  box next to the document name.

1. Click first on Document Directory
2. Then on Administration
3. Then on Human Resources to see the first level of HR folders



The folder the document is being directed to is listed at the bottom of the box under **You have selected**. When you click on the checkbox next to the destination folder a check will appear and the name of the folder will be added to the list at the bottom.



You may select multiple destination folders in this window. When you are finished select **OK**.

The new folder path will show up under the document name. If you accidentally add the wrong folder you can deselect later.

## To approve the document

To mark a document for approval select the radio button next to the document title in the leftmost column.



The middle column marks the document for rejection.  
The final column leaves the document in the approval queue.

Alternatively you can click either **Reject All** [Reject All](#), **Approve All** [Approve All](#) or **Hold All** [Hold All](#).

To send the document to some, but not all of the folders listed under its name follow these steps:

1. Click once next to the document in the approve column to move all of the to place checks in all of the boxes



2. Click under the red dot in the row next to the folders where you DO NOT want the document.

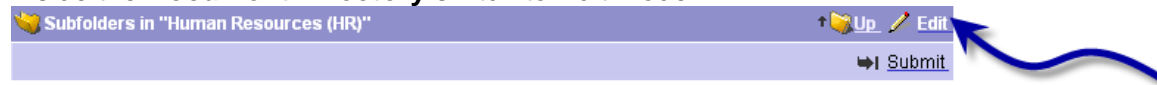


Once you have edited everything, ensured that the document is headed to the correct folder, and marked the files for approval; click on **Finish** to finalize the approval.

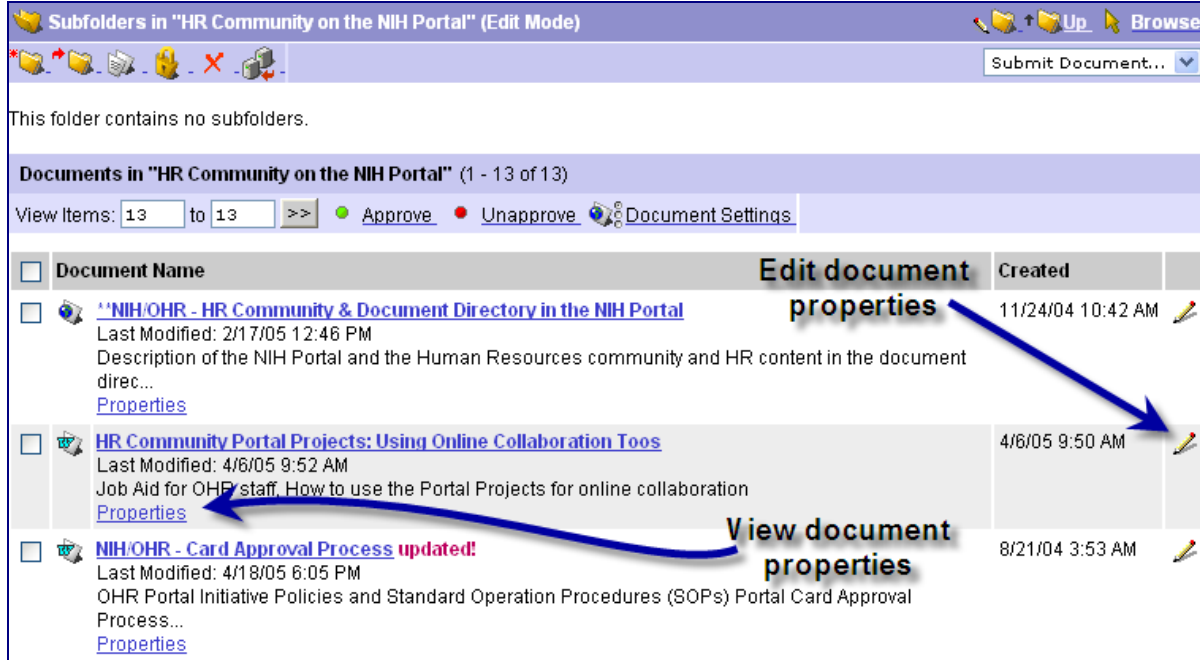
### Editing Content Outside the Approval Queue

After you have approved content for the portal, you can still edit and manage that content from the **Document Directory**.

Inside the **Document Directory** switch to Edit Mode.



The list of documents alters to include boxes next to the titles, a properties link, and an edit icon.



Subfolders in "HR Community on the NIH Portal" (Edit Mode) Up Browse


This folder contains no subfolders.

Documents in "HR Community on the NIH Portal" (1 - 13 of 13)

View Items: 13 to 13 Approve Unapprove Document Settings

<input type="checkbox"/>	Document Name	Edit document properties	Created
<input type="checkbox"/>	<a href="#">'NIH/OHR - HR Community &amp; Document Directory in the NIH Portal</a> Last Modified: 2/17/05 12:46 PM Description of the NIH Portal and the Human Resources community and HR content in the document direc... <a href="#">Properties</a>		11/24/04 10:42 AM
<input type="checkbox"/>	<a href="#">HR Community Portal Projects: Using Online Collaboration Toos</a> Last Modified: 4/6/05 9:52 AM Job Aid for OHR staff. How to use the Portal Projects for online collaboration <a href="#">Properties</a>		4/6/05 9:50 AM
<input type="checkbox"/>	<a href="#">NIH/OHR - Card Approval Process updated!</a> Last Modified: 4/18/05 6:05 PM OHR Portal Initiative Policies and Standard Operation Procedures (SOPs) Portal Card Approval Process... <a href="#">Properties</a>		8/21/04 3:53 AM

The **Properties** link takes you to a summary of the documents properties. You can edit the document's properties by clicking on the **Edit** button at the top of the page.

The edit document icon  takes you directly to the same **Edit Document Properties** window described above.