

Creating an Activity

An **Activity** is a type of *Content Item* in the Vignette Content Management Console and includes Events, Campaigns and Webcast Registrations.

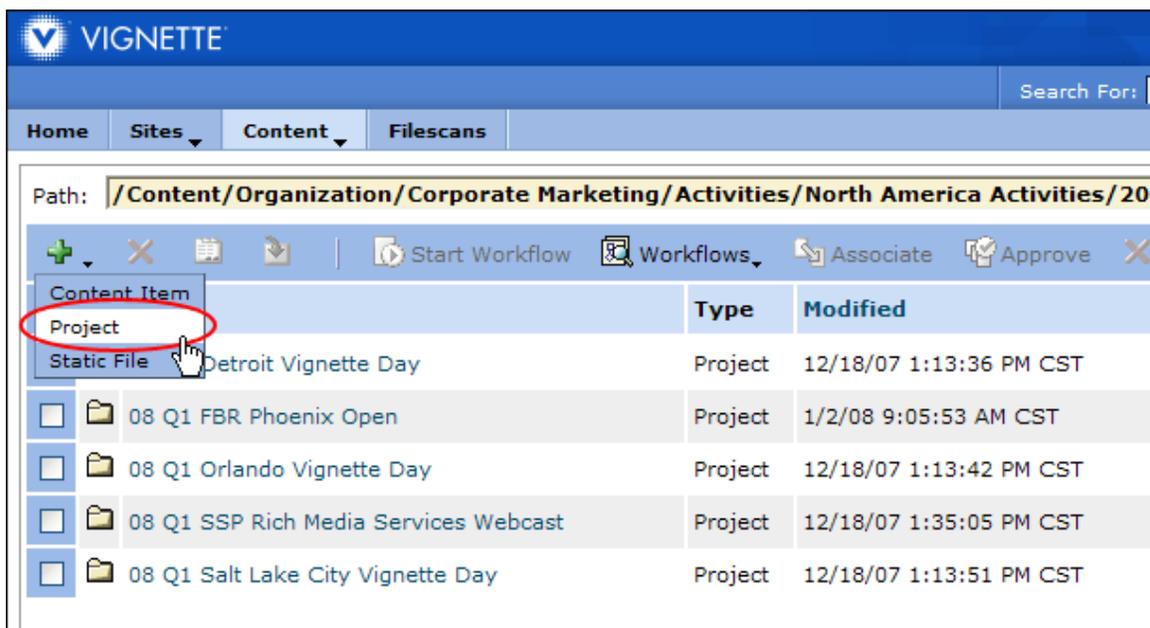
An **Event** is an Activity with Locations, meaning that there is a specific time and/or place (Location) for which a visitor will be registering. Examples include a seminar series with Locations in New York, Boston and San Francisco.

A **Campaign** is an Activity that has no Locations. An example would be registration to access PDFs of special white papers or case studies through a unique Bonus Page.

A **Webcast Registration** can be on demand or with live Q&A on a particular date and time (Location).

1. Create a Project to house your Activity.

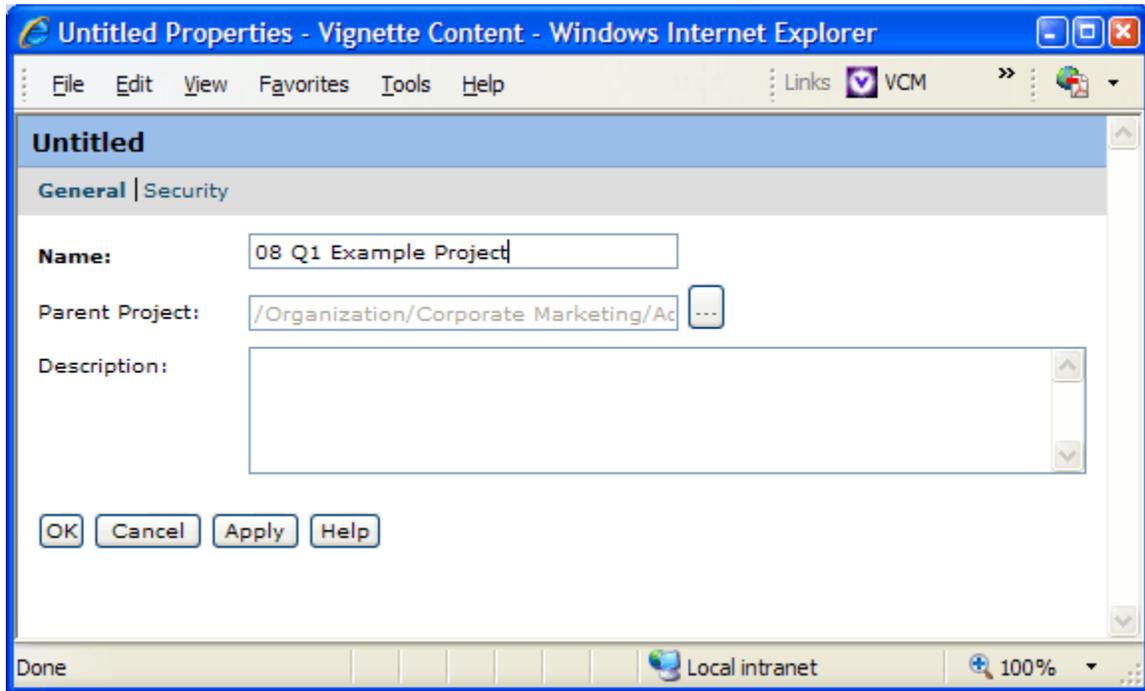
- a. Drilldown through the Project directory to the proper date range for the Activity. In this example, the destination Project will be located in Content → Organization → Corporate Marketing → Activities → North America Activities → 2008 Q1 Activities.
- b. Hover over the **Create** icon, and select “Project” from the dropdown menu. A *new window opens*.



The screenshot shows the Vignette Content Management Console interface. The top navigation bar includes 'Home', 'Sites', 'Content', and 'Filescans'. The breadcrumb path is '/Content/Organization/Corporate Marketing/Activities/North America Activities/2008 Q1 Activities'. A toolbar contains icons for '+', 'X', 'Print', 'Download', 'Start Workflow', 'Workflows', 'Associate', and 'Approve'. A dropdown menu is open under the '+' icon, with 'Project' highlighted and circled in red. Below the menu is a table of existing projects.

	Type	Modified
<input type="checkbox"/> Static File Detroit Vignette Day	Project	12/18/07 1:13:36 PM CST
<input type="checkbox"/> 08 Q1 FBR Phoenix Open	Project	1/2/08 9:05:53 AM CST
<input type="checkbox"/> 08 Q1 Orlando Vignette Day	Project	12/18/07 1:13:42 PM CST
<input type="checkbox"/> 08 Q1 SSP Rich Media Services Webcast	Project	12/18/07 1:35:05 PM CST
<input type="checkbox"/> 08 Q1 Salt Lake City Vignette Day	Project	12/18/07 1:13:51 PM CST

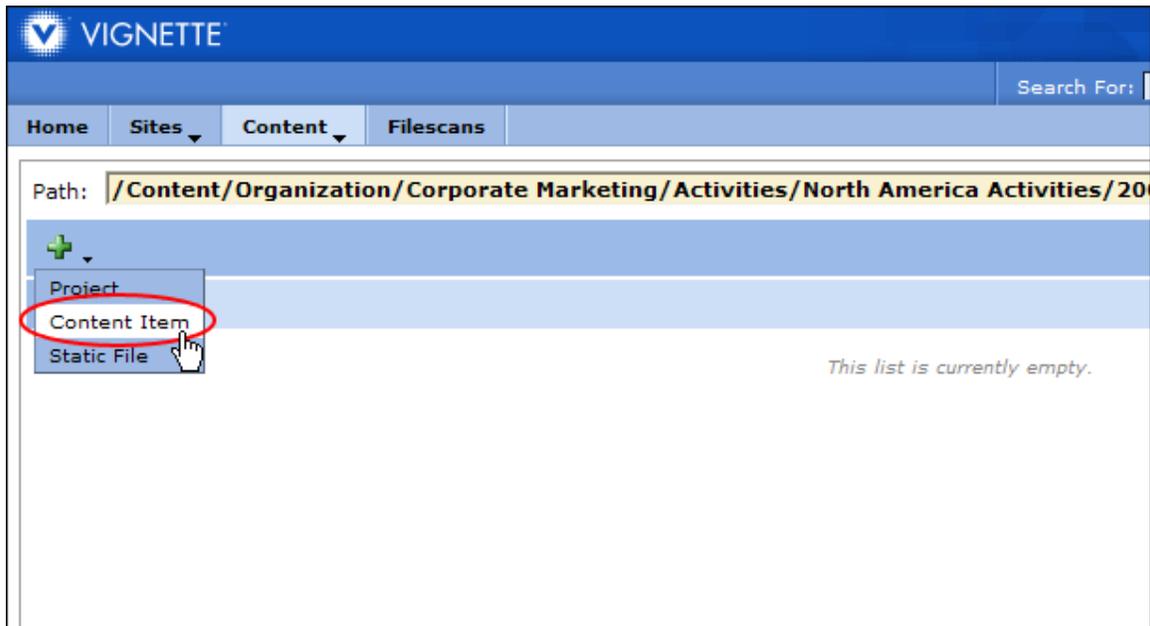
- c. Type an identifiable name for this Activity's folder, beginning with **2-digit year, then quarter (e.g. Q1), then a descriptive name.**



- d. Click the **OK** button to save the Project. *The new window closes.*

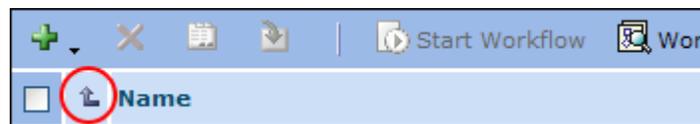
2. Create the Activity.

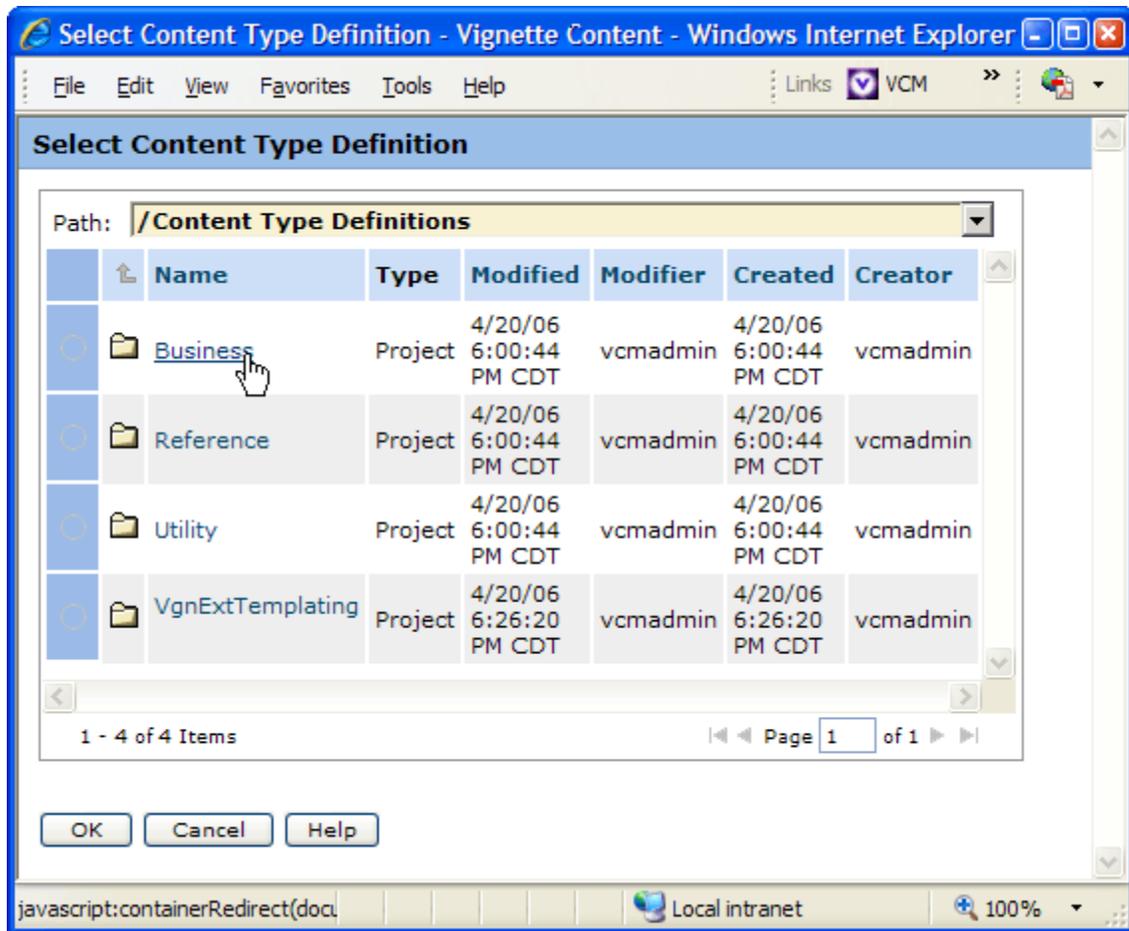
- a. Click on the name of the newly created Project.
- b. Hover over the **Create** icon and select “Content Item” from the dropdown menu. *A new window opens.*

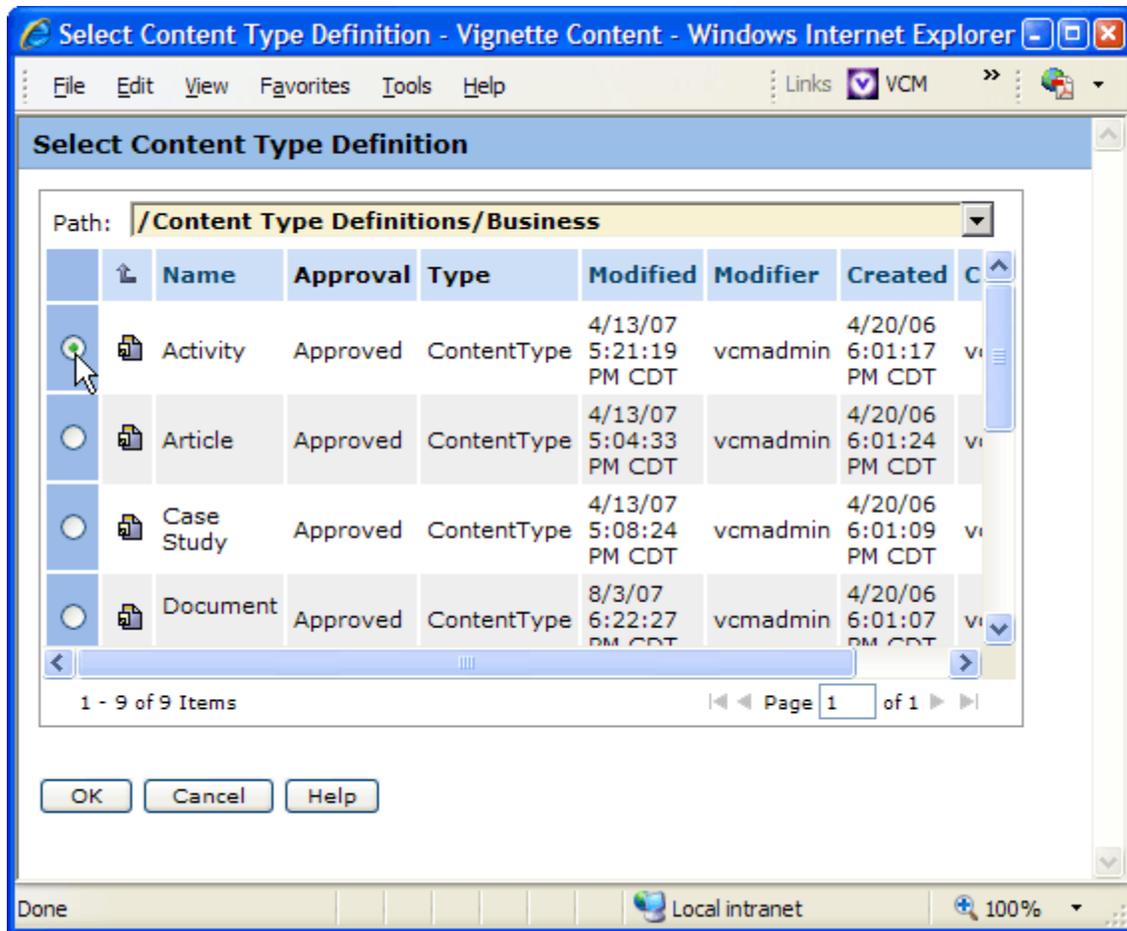


- c. If this is the first time to select a Content Type in *this session*, you will be presented with the top-level Content Type Definition Screen. An Activity is a “Business” Content Type Definition, so drilldown through the **Business** folder and select the **Activity** Content Type Definition. Afterwards, the VCM Console will remember your last location and will open directly in the “Business” Content Type Definition folder the next time you create a Content Item.

NOTE: When drilling down through the VCM Console, you must click *on the name* of the Project or Channel. But, to select a Project or Channel you must click the radio button next to its name. If you drilldown too far, you can click the **Up** icon that resides in the blue title bar next to the “Name” column.







d. Click the **OK** button. *The “New Activity” form opens in a new window.*

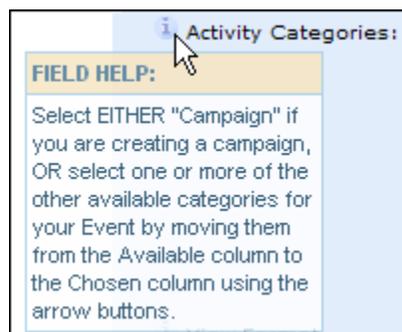
NOTE: It is possible to use the “Create Content Item” or “Create Activity” shortcuts on the VCM Console home screen to create an Activity if the Project containing the Activity has already been created. **See the [Creating Articles](#) documentation in Harmony for more assistance.**

3. Populate the form fields on the General screen.

The **Activity Title** is the event title that will display on the Web page and in events listings.

Note: The links along the left side of the Activity window can be used to navigate to the different screens of the form.

Note: Mouse over the Information icons ⓘ to the left of field names to access **Help Text**. If additional information is available for that field, a **Field Help** box will appear displaying the help text.



- a. If this Activity is an Event and the visitor will be able to register online at www.vignette.com, select the “Yes” radio button. Otherwise, select the “No” radio button.

* = Required

*

rditulli

rditulli

English *

Yes
 No

ons? Yes
 No

Is this Activity Active? Yes
 No

Friendly Id:

Audience: Public *

Is registration available on www.vignette.com? Yes
 No

Shorten the form? Yes
 no

Select One ...

* = Required

Group: activityCategory

Available	Chosen
Campaign	
Customer Events	

Note: Campaigns for document downloads and some Prospecting Events where the visitor will be sent to another Web site to register are examples where “No” should be selected for this field.

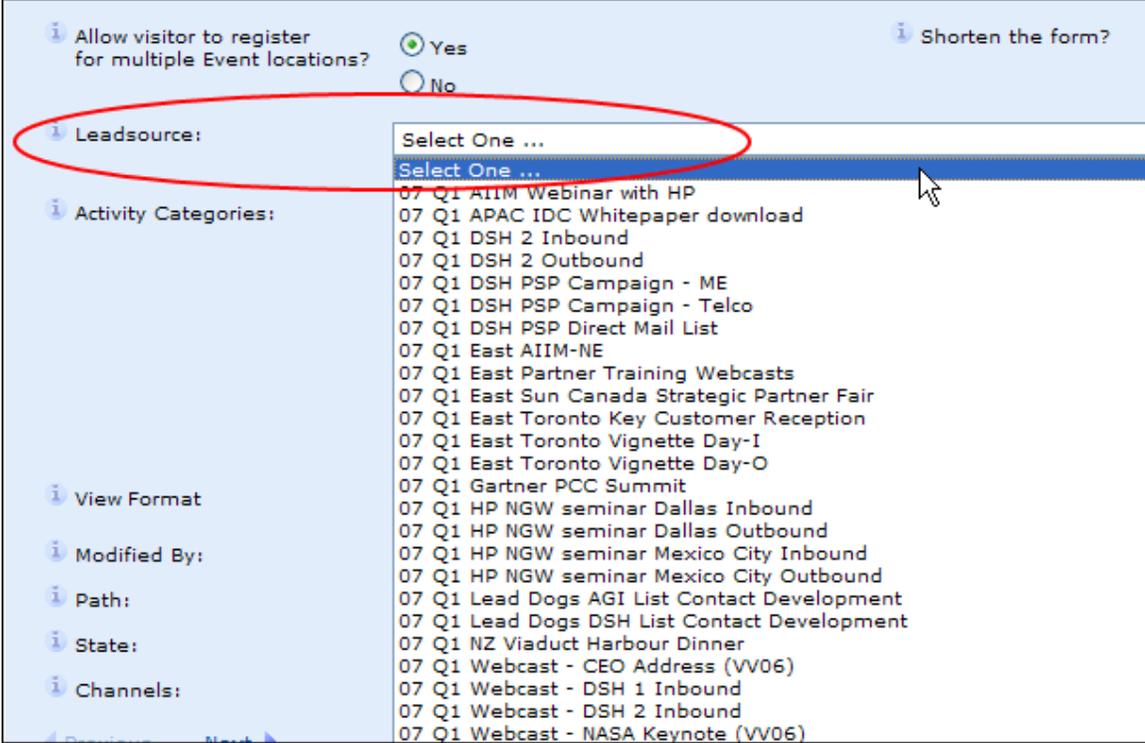
- b. If a site visitor should be able to register for multiple locations of this event, select the “Yes” radio button. Otherwise, select the “No” button.

The image shows a screenshot of a web application interface for creating a new activity. The title is "New Activity" and there are several tabs: "General", "Classifications", "Channels", "Versions", "Security", "Preview", "Status", and "Scheduling". The "General" tab is selected. On the left side, there is a navigation menu with options: "General", "Main", "Customize", "Location & Contacts", "Internal Search", and "External Search". The main content area contains several form fields:

- Activity Title:** An empty text input field.
- Activity Author:** A text input field containing "rditulli" and a "Clear" button.
- Owner:** A text input field containing "rditulli" and a "Clear" button.
- Locale:** A dropdown menu set to "English" with a red asterisk indicating it is required.
- Display in Event List?:** Radio buttons for "Yes" (selected) and "No".
- Allow visitor to register for multiple Event locations?:** Radio buttons for "Yes" (selected) and "No". This entire section is circled in red.
- Leadsources:** A dropdown menu set to "Select One ..." with a red asterisk indicating it is required.

- c. Select the appropriate Leadsources for the Activity. These need to be created in SOMA first to be selectable from the VCM.

Note: For more information about creating Leadsources, please read the [Leadsources "How To" Resource](#). This documentation includes contact information to request the appropriate access role for creating Leadsources in SOMA.



d. Select the appropriate **Activity Category** for the activity being created.

Note: Webcasts need to change from “Webinar” to “Campaign” once they are ready to be available on demand.

The screenshot shows a web form for creating an activity. At the top, there are two questions: "Allow visitor to register for multiple Event locations?" with radio buttons for "Yes" (selected) and "No", and "Shorten the form?". Below this is a "Leadsources:" dropdown menu with "Select One ..." and a red asterisk. The "Activity Categories:" section is highlighted with a red circle and contains a "Group: activityCategory" label and a selection interface. This interface has two columns: "Available" and "Chosen". The "Available" column lists "Campaign", "Customer Events", "Executive Seminar Ser", "Investor Relations", "Prospect Events", and "Public Sector". There are arrow buttons between the columns. Below the "Activity Categories" section is a "View Format" dropdown menu with "Select One ...". At the bottom, there are fields for "Modified By:", "Path:", "State:", and "Channels:", all with "N/A" values. To the right, there are fields for "Last Modified:" and "Status:". At the very bottom, there are "Previous" and "Next" navigation buttons.

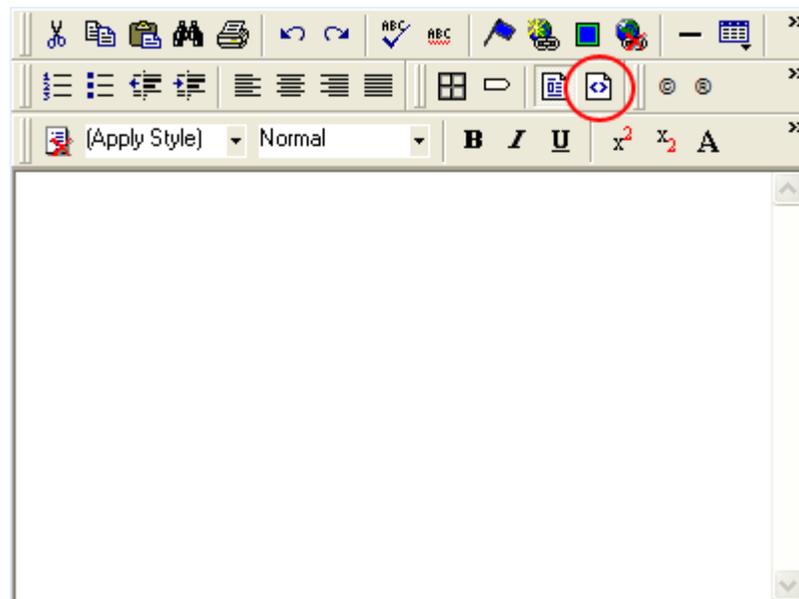
4. From the left-hand navigation, go to the Main screen.

This screen allows input of the copy for the activity.

- a. The Summary, Body, Agenda and Confirmation Email fields make use of a WYSIWYG text editor that has formatting functionality similar to MS Word. These fields can accept a mix of text, HTML, images and inline links to other Managed Objects or External Sites.

Note: The Summary field is used by the internal search engine to index the activity; this is also the text that will display on the search results page.

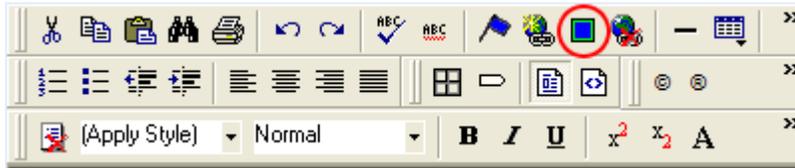
- b. To edit raw HTML, click on the **View Source** icon. The icon to the left of this icon will return the field to the WYSIWYG view.



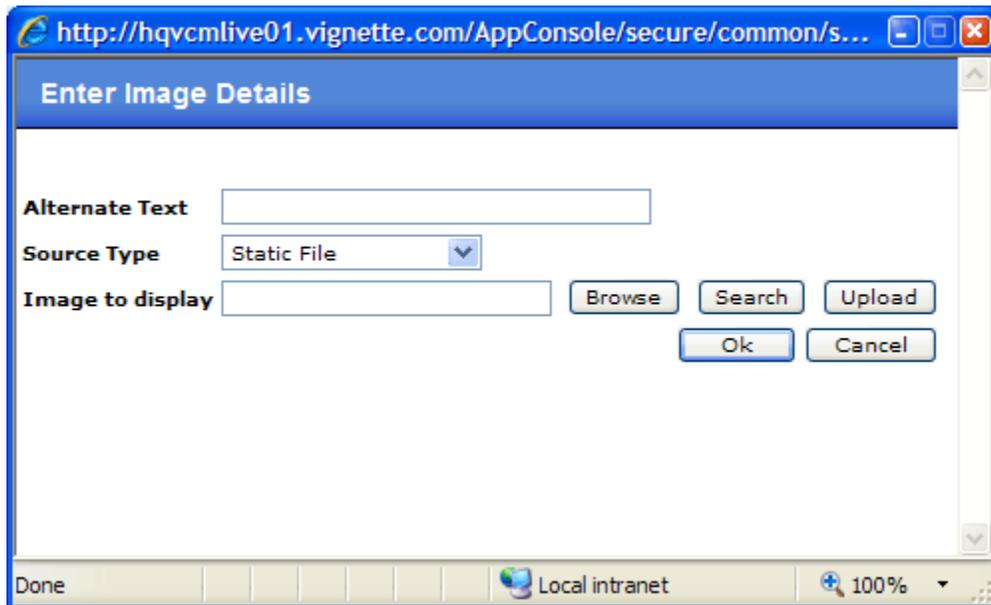
Note: The first time a VCM screen with WYSIWYG capabilities is accessed, you will be prompted to install the e-WebEdit Pro plug-in. This plug-in must be installed in order to be able to use the WYSIWYG functions. *This is only available with Internet Explorer.* If the plug-in is not installed or another browser is used to access the VCM, insert formatted HTML into these fields.

- c. Images can be selected from the VCM and inserted into the WYSIWYG editor.

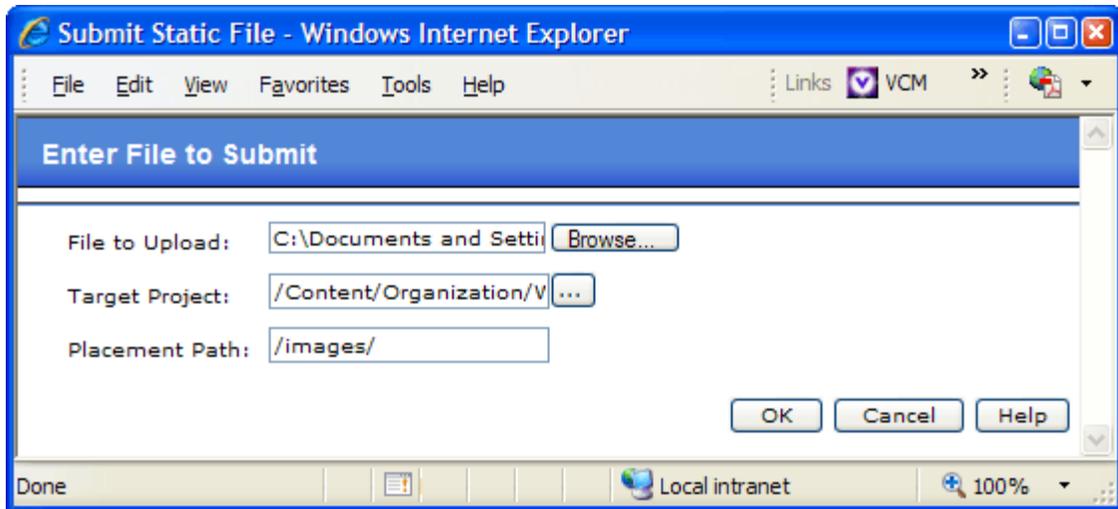
- i. Click the **Insert Image, Image Map or Flash** icon. *A new window opens.*



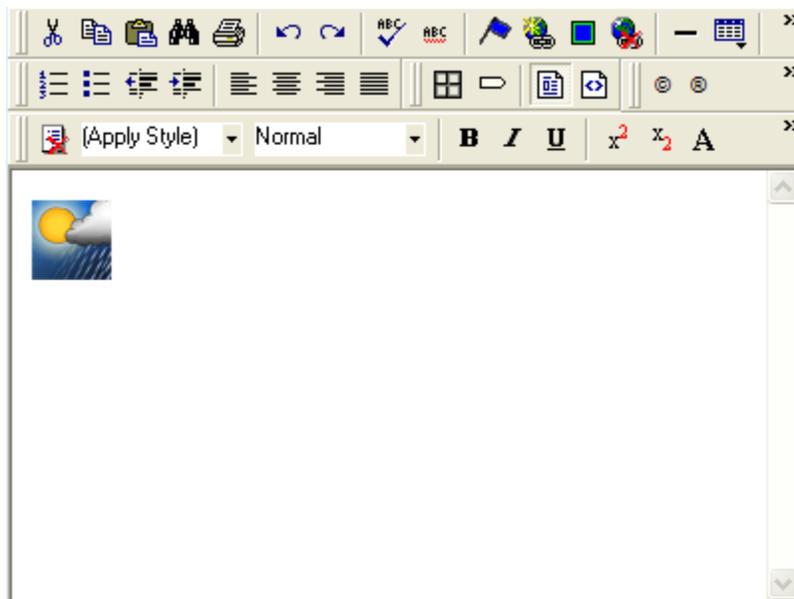
- ii. Fill out the **Alternate Text** and **Source Type of the Image** (Static File or Static File Wrapper) fields.



- iii. If the image already exists in the VCM Repository, it can be located by either browsing or searching. If the image is not in the Repository, it can be uploaded from this screen.
 - a) Click the **Upload** button. *A new window opens.*
 - b) Browse the local machine to find the image to upload.
 - c) Select a Target Project in the VCM that will house the image.
 - d) Type in a placement path to be used for the image.
 - e) Click the **OK** button to upload the file. *The new window closes.*



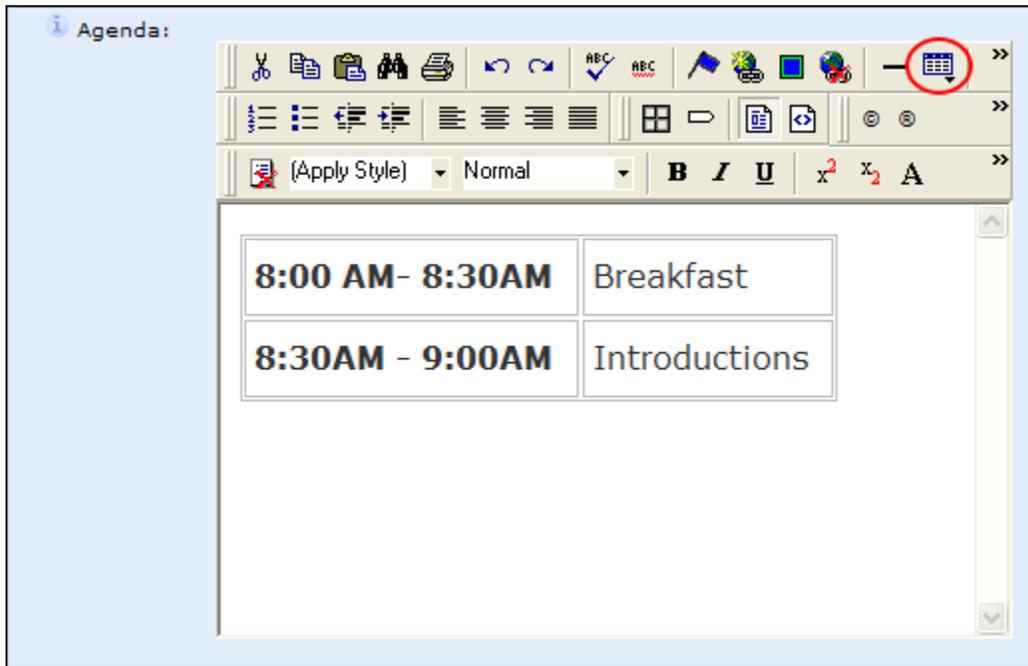
- iv. Click the **OK** button in the “Enter Image Details” window. *The window closes* and the image appears in the WYSIWYG editor for the field on the Activity form window.



- d. Inline links can be created to other Managed Objects or External Sites. See the [Creating Inline Links](#) documentation in Harmony for more assistance.

- e. If the Activity's **Agenda** will have multiple items (e.g., 8:00 AM- 8:30AM Breakfast, 8:30AM – 9:00AM Introductions, etc.), create an HTML table to display these. The WYSIWYG editor provides a tool to insert HTML tables. Click the **Table** icon to bring up configuration dropdown menu.

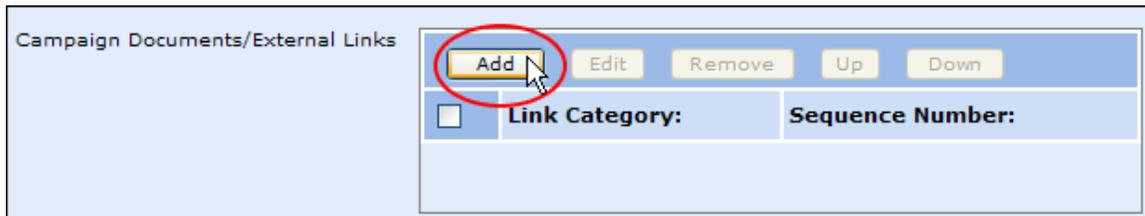
Note: Table properties can always be further configured by viewing the source and editing the HTML directly.



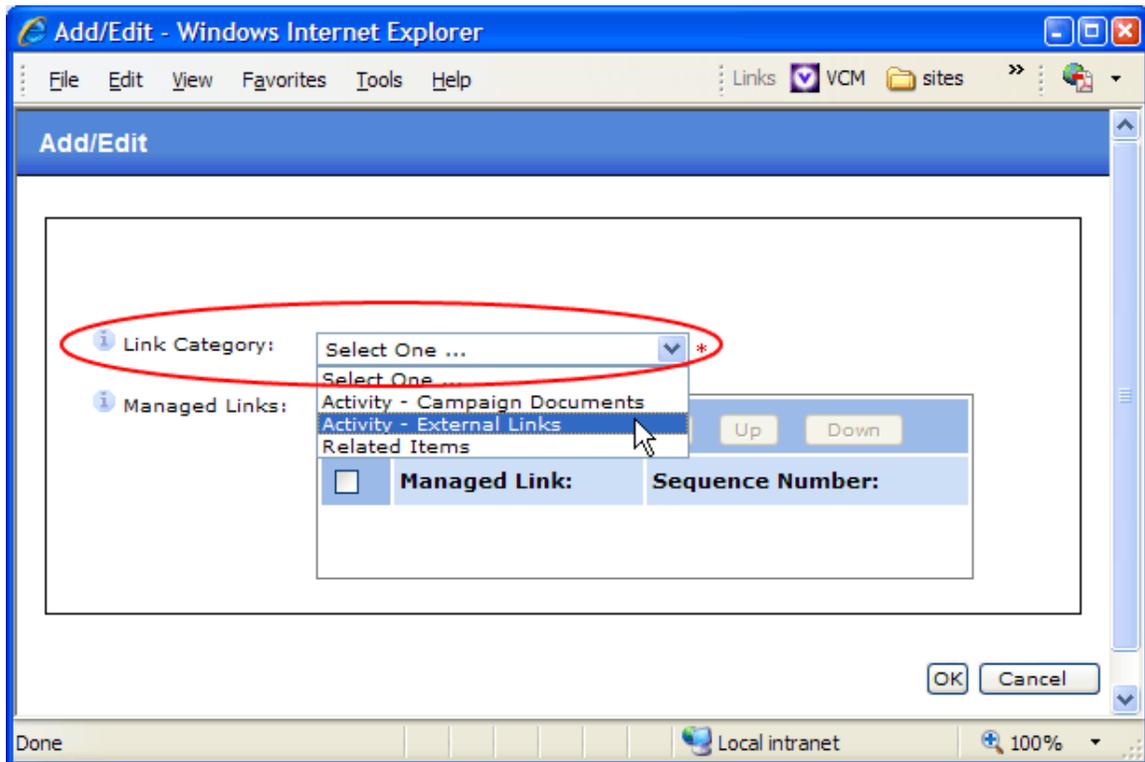
5. From the left-hand navigation, go to the Customize screen.

This screen allows the adding of documents, additional form questions, configuration of the confirmation e-mail and of the bonus page.

- a. **Campaign Documents/External Links:** If desired, one or more **Custom Links** can be added. These are links to Campaign Documents (e.g., handouts, presentation slides, etc.) available for download at the time of registration or External Links that will allow the visitor to register online at an external Web site.
 - i. Click the **Add** button for the Custom Link. *A new window opens.*

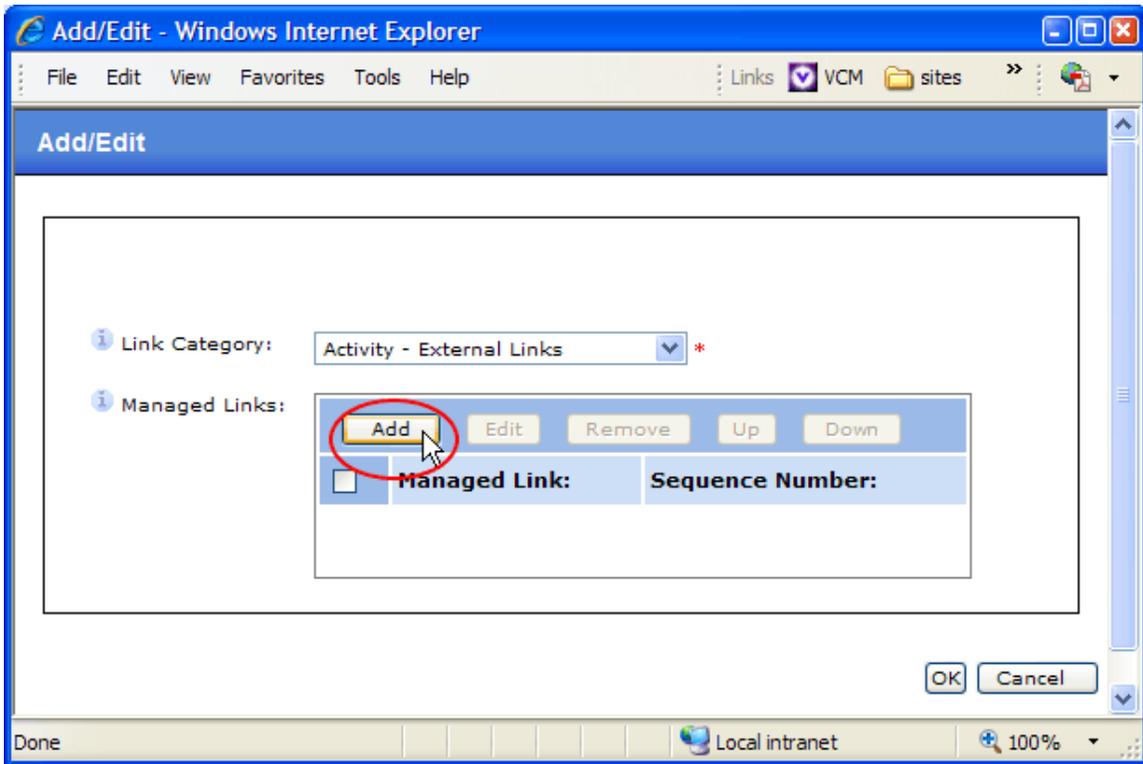


- ii. Select a **Link Category** from the dropdown list. These have been previously defined within the system.

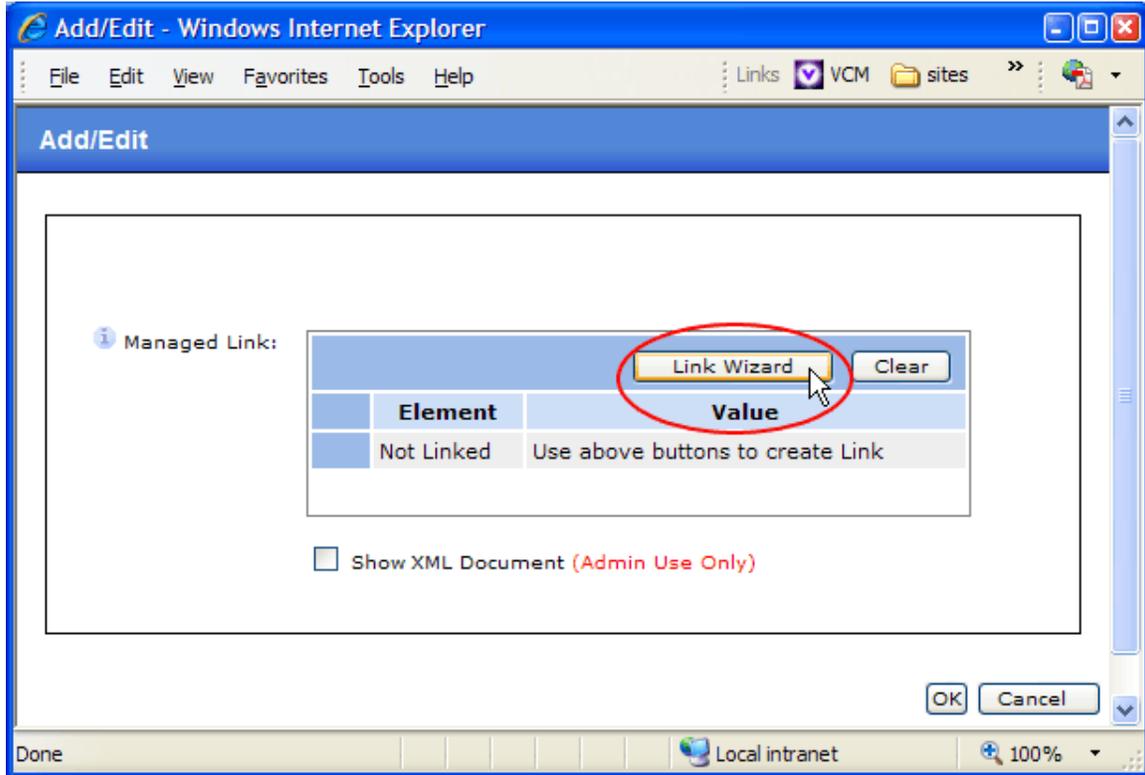


iii. Add one or more **Managed Links** to the Link Category.

a) Click the **Add** button in the “Managed Links” area. In this example, an External Link will be added. *A new window opens.*

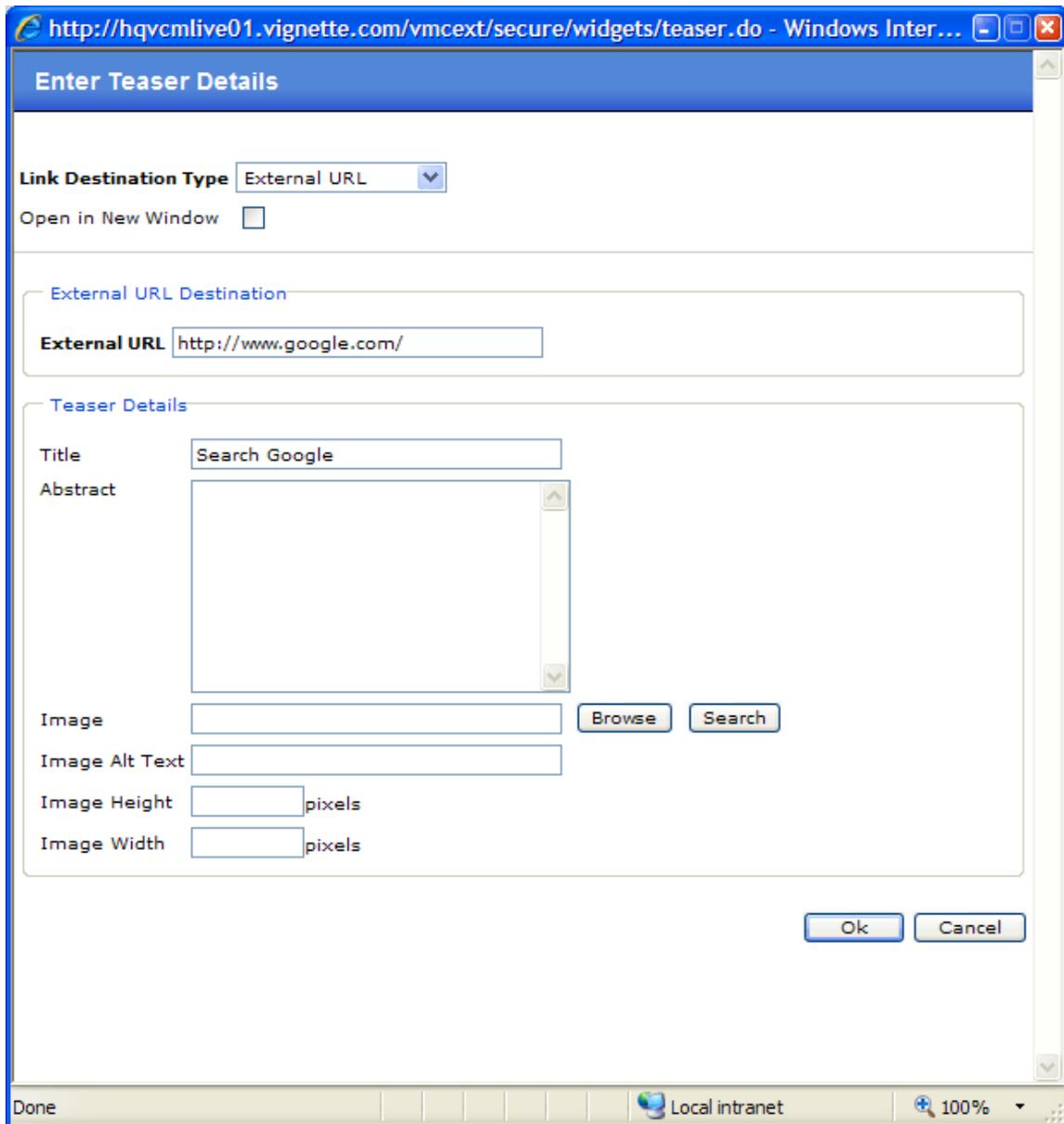


b) Click the **Link Wizard** button. *A new window opens.*



c) Create the Managed Link.

- i. The top portion of the Managed Link screen is similar to the Inline Links screen – in this example, an External URL Managed Link. **See the [Creating Inline Links](#) documentation in Harmony for more assistance.**
- ii. Under the “Teaser Details” area, enter a Title which will function as the link text for the Link.
- iii. *Optional:* Enter an abstract that will appear next to the link text.
- iv. *Optional:* Browse or search for an image that will appear with the Managed Link. Be sure to add the height and width of the image.

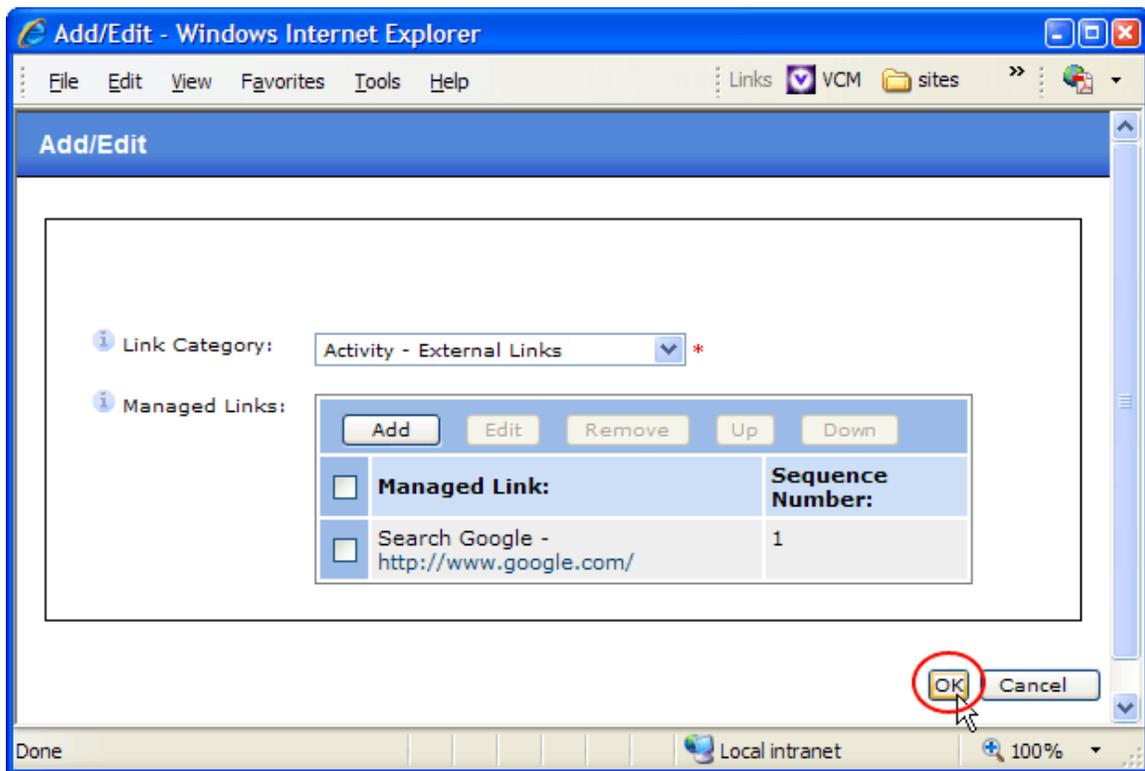


- d) Click the **OK** button on the Managed Link screen. *The window closes.*
- e) A mockup of the Link will appear after the screen refreshes. Click the **OK** button on the Add/Edit screen. *The window closes.*
- f) The original Link Category popup window will refresh, showing the new link.

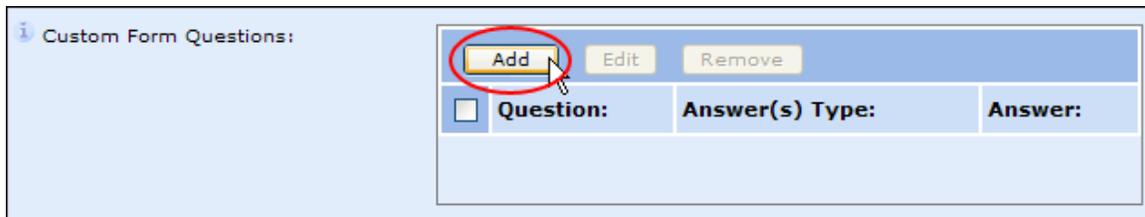
Optional: If more Managed Links are desired, click the **Add** button to add more Links.

Optional: The order of links can be rearranged by clicking an individual link's check box and clicking either the **Up** button or **Down** button to move it.

- g) Click the **OK** button to add the Link Category to the Activity.
The window closes.

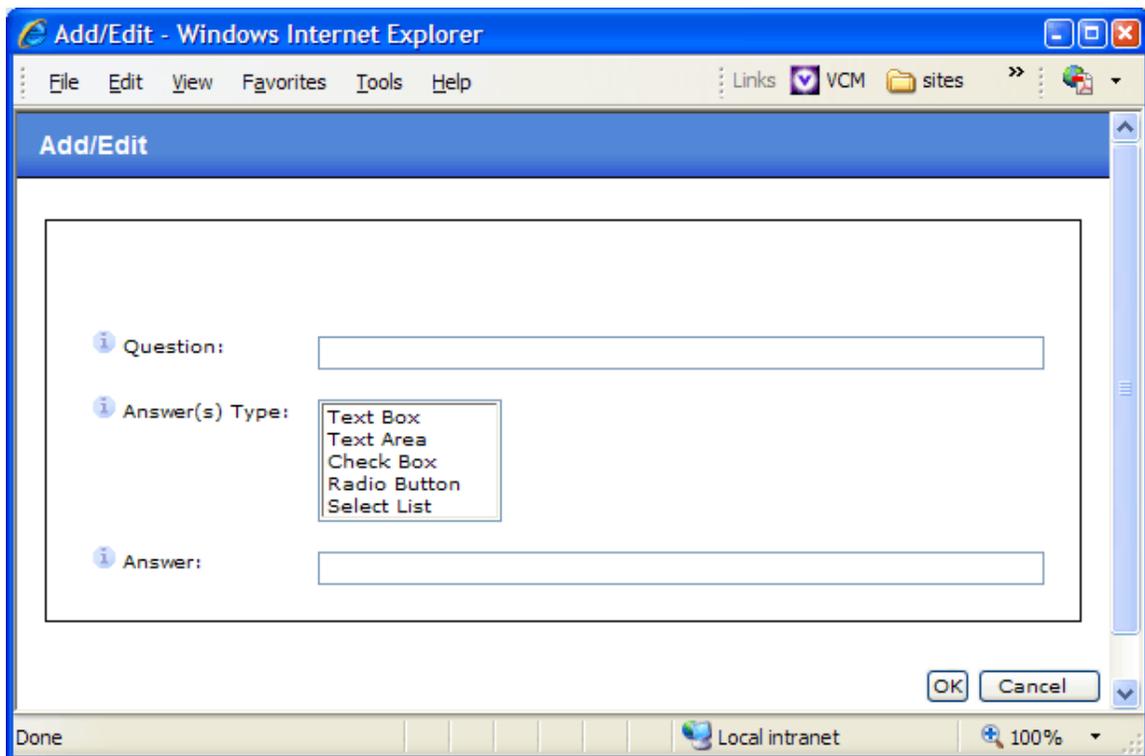


- b. **Custom Form Questions:** If needed, add additional form fields to the standard form.
- Click the **Add** button. *A new window opens.*



- Fill out the form fields, following the instructions on screen.

Note: Mouse over the Information icons **i** to the left of field names to read the **Help Text**.

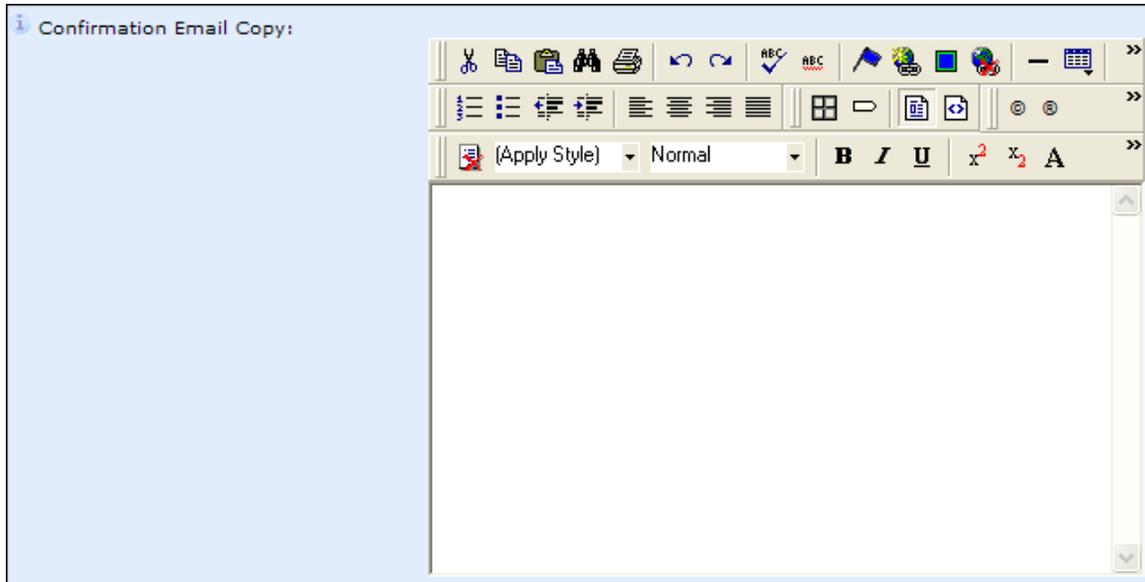


- Click the **OK** button to add the form field to the activity. *The window closes.*

- c. **Confirmation E-mail:** If the standard confirmation e-mail that is sent to visitors after they have registered is not appropriate to this Activity, enter the text for a custom e-mail in the “Confirmation Email Copy” field.

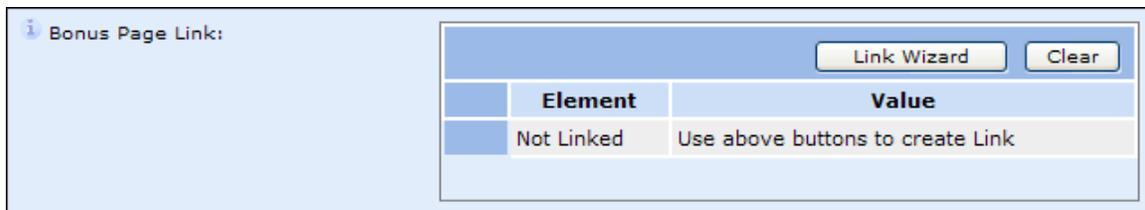
A common example of this usage is sending the visitor a link to a Webcast in the confirmation e-mail.

Note: This field uses the WYSIWIG editor and can accept fully formatted HTML, including links.



- d. **Bonus Page Link:** If the standard confirmation screen that displays to visitors after registration is not appropriate and you wish to create a custom confirmation screen, create a link to a custom confirmation screen via the Bonus Page Link. This will create a link to a custom piece of content (e.g., an Article that has previously been created) that will display the proper confirmation. **For assistance, see instructions for adding links in the Custom Link section, above.**

A common example of this usage is a link to a Document for a PDF in a data for download Activity.



6. From the left-hand navigation, go to the Location & Contacts screen.

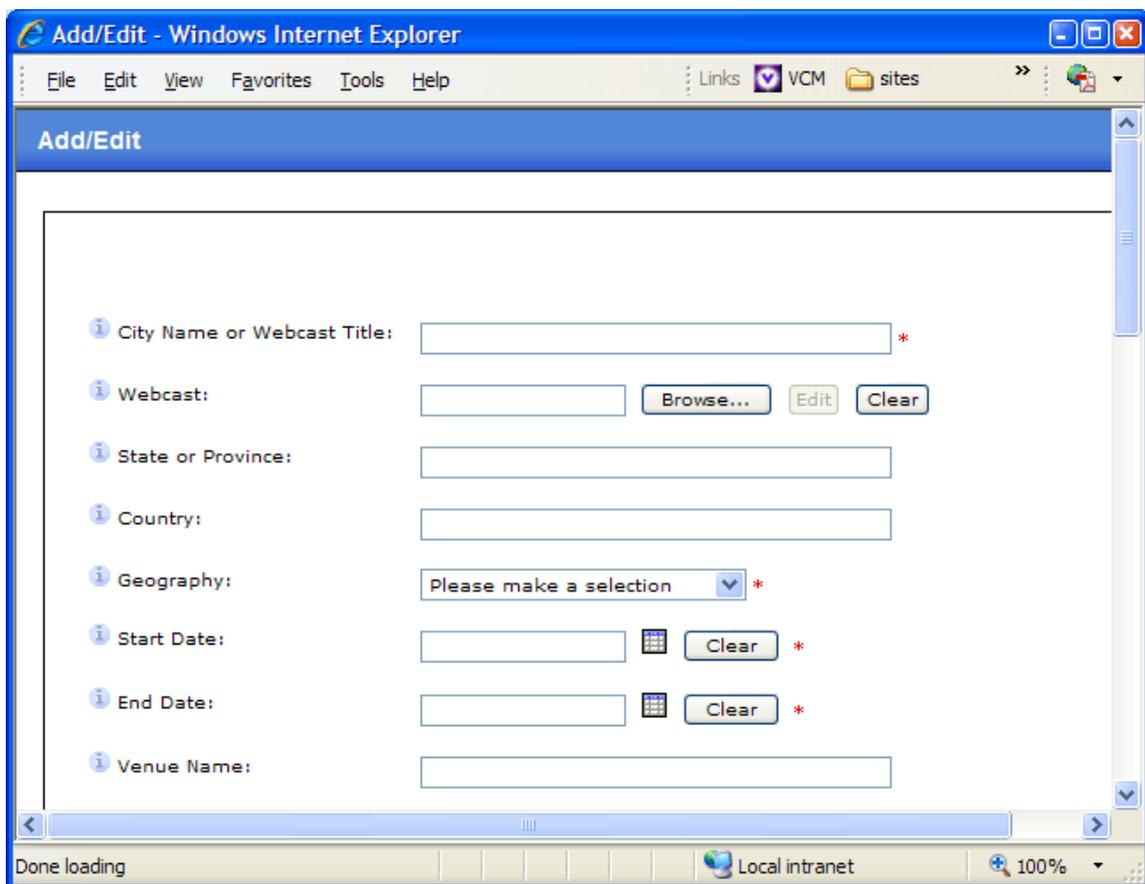
This screen is where the event location(s) and contact(s) are entered. If the Event will have multiple locations, create an Event Location for each.

- a. **Event Locations:** Click the **Add** button to add a new Event Location. A new window opens.



The screenshot shows a web interface for managing event locations. At the top, there is a header with an information icon and the text "Event Locations:". Below this header are three buttons: "Add", "Edit", and "Remove". The "Add" button is circled in red, and a mouse cursor is pointing at it. Below the buttons is a table with three columns: "City Name or Webcast Title:", "State or Province:", and "Country:". The table is currently empty.

- i. Fill out the Event Location details.



The screenshot shows a browser window titled "Add/Edit - Windows Internet Explorer". The browser's address bar shows "Local intranet" and the page is at 100% zoom. The page content is a form for adding or editing an event location. The form has the following fields and controls:

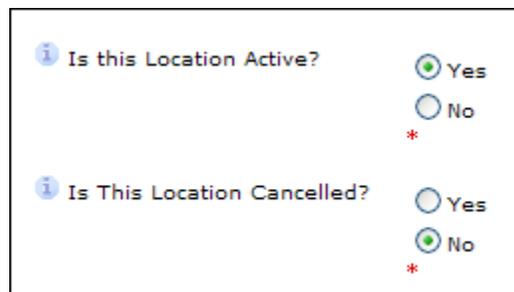
- City Name or Webcast Title:** A text input field with a red asterisk indicating it is required.
- Webcast:** A text input field with "Browse...", "Edit", and "Clear" buttons.
- State or Province:** A text input field.
- Country:** A text input field.
- Geography:** A dropdown menu with "Please make a selection" and a red asterisk.
- Start Date:** A date input field with a calendar icon and a "Clear" button with a red asterisk.
- End Date:** A date input field with a calendar icon and a "Clear" button with a red asterisk.
- Venue Name:** A text input field.

Note: Please disregard the **Webcast** field. If this Location is a Webcast, you will need to create a **Webcast** Content Item.



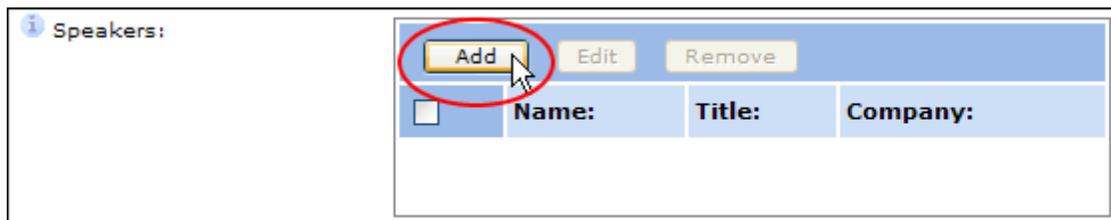
A screenshot of a form field labeled "Webcast:". To the right of the label is an empty text input box. A large red "X" is drawn over the input box. To the right of the input box are three buttons: "Browse...", "Edit", and "Clear".

- ii. If the Location is not Active, click the **No** radio button. By default, the "Yes" option is selected.
- iii. If the Location has been cancelled, select the **Yes** radio button. By default, this is pre-selected with "No." You would only select "Yes" if the Location were later cancelled after the Location was initially added to the Event.



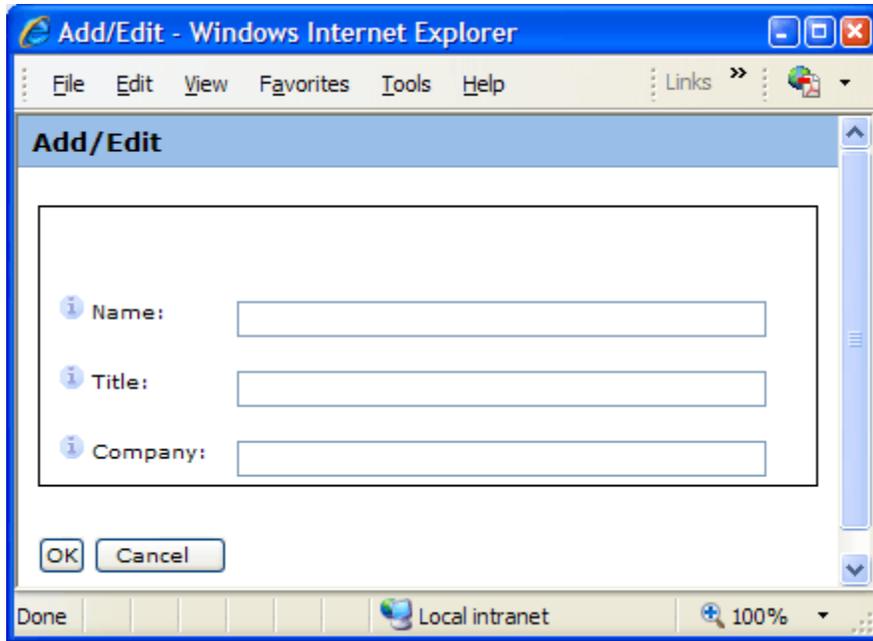
A screenshot of two radio button questions. The first question is "Is this Location Active?" with "Yes" selected (indicated by a green dot) and "No" unselected. A red asterisk is to the right of "No". The second question is "Is This Location Cancelled?" with "Yes" unselected and "No" selected (indicated by a green dot). A red asterisk is to the right of "No".

- iv. If needed, enter a **Speaker**.
 - a) Click the **Add** button. *A new window opens.*



A screenshot of a form section labeled "Speakers:". At the top right of the section are three buttons: "Add", "Edit", and "Remove". The "Add" button is circled in red, and a mouse cursor is pointing at it. Below the buttons is a table with a header row and one empty row. The header row has a checkbox in the first column, and the following columns are labeled "Name:", "Title:", and "Company:".

- b) Enter the Name, Title and Company of the Speaker. Then click the **OK** button to save the speaker to the activity. *The window closes.*

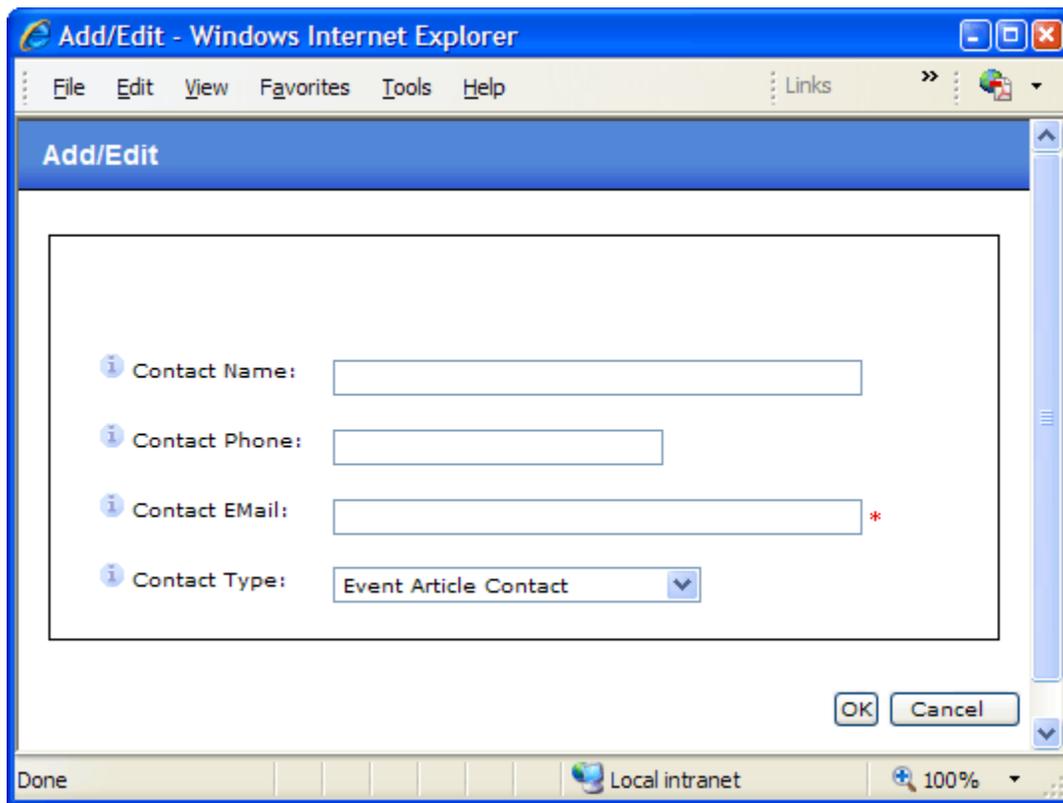


- v. If any location-specific Documents should be added, add them here. The Document will be added using the Link Wizard. For assistance using the Link Wizard, **see the instructions for adding a Custom Link, above.**
- vi. Click the **OK** button to save the Event Location to the Activity.
The window closes.

- b. **Event Contacts:** Click the **Add** button to add a new Vignette Event Contact. *A new window opens.*



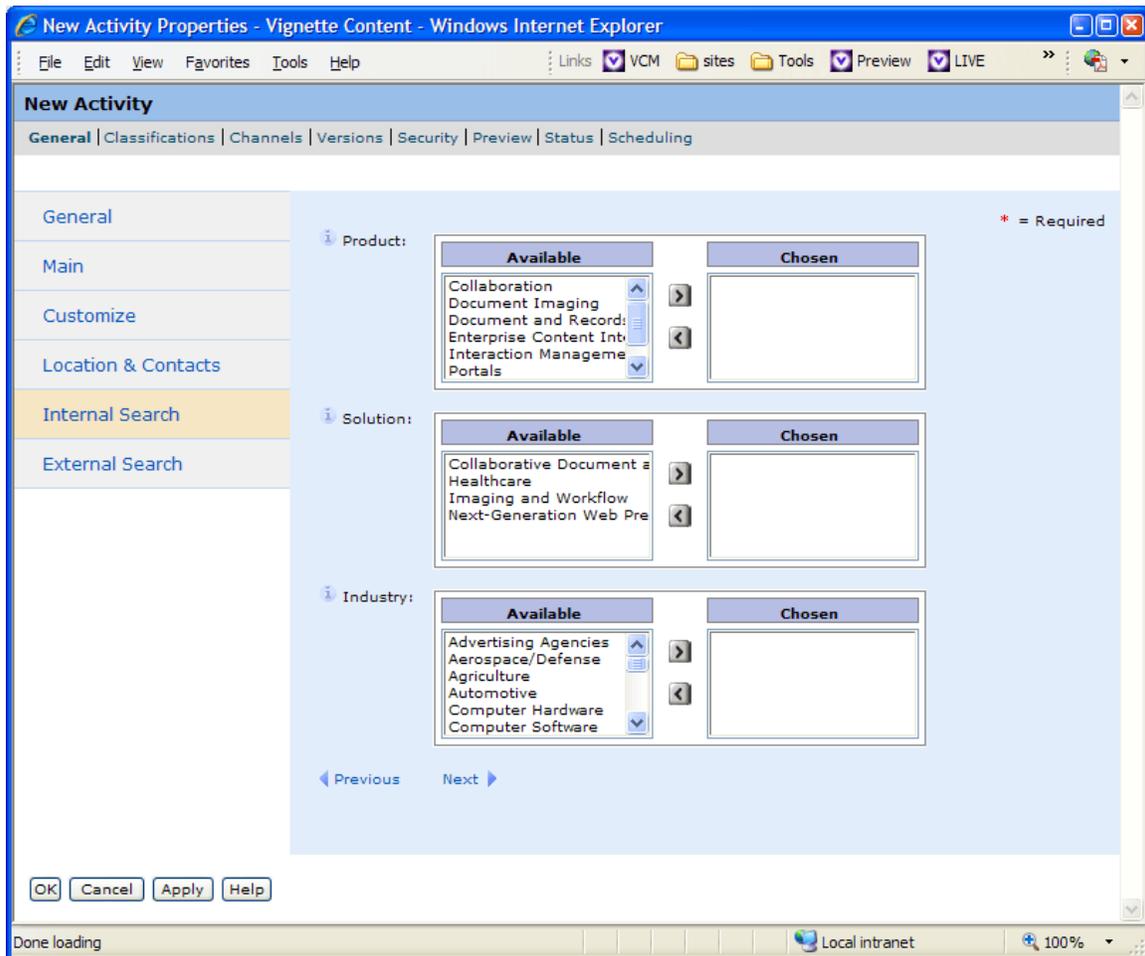
- i. In the text fields, enter the Vignette Contact Name, Phone Number and E-mail address.
- ii. In the Contact Type dropdown menu, designate if this person should be an Article Contact (appearing in the main Activity body) or Confirmation Email contact (appearing in the confirmation e-mail).



- iii. Click the **OK** button to save the Contact to the Activity. *The window closes.*

7. From the left-hand navigation, go to the Internal Search screen.

Be sure to select Product, Solution and Industry categorization on the **Internal Search** screen. These are used by the internal search engine on vignette.com sites to locate relevant content within the site.

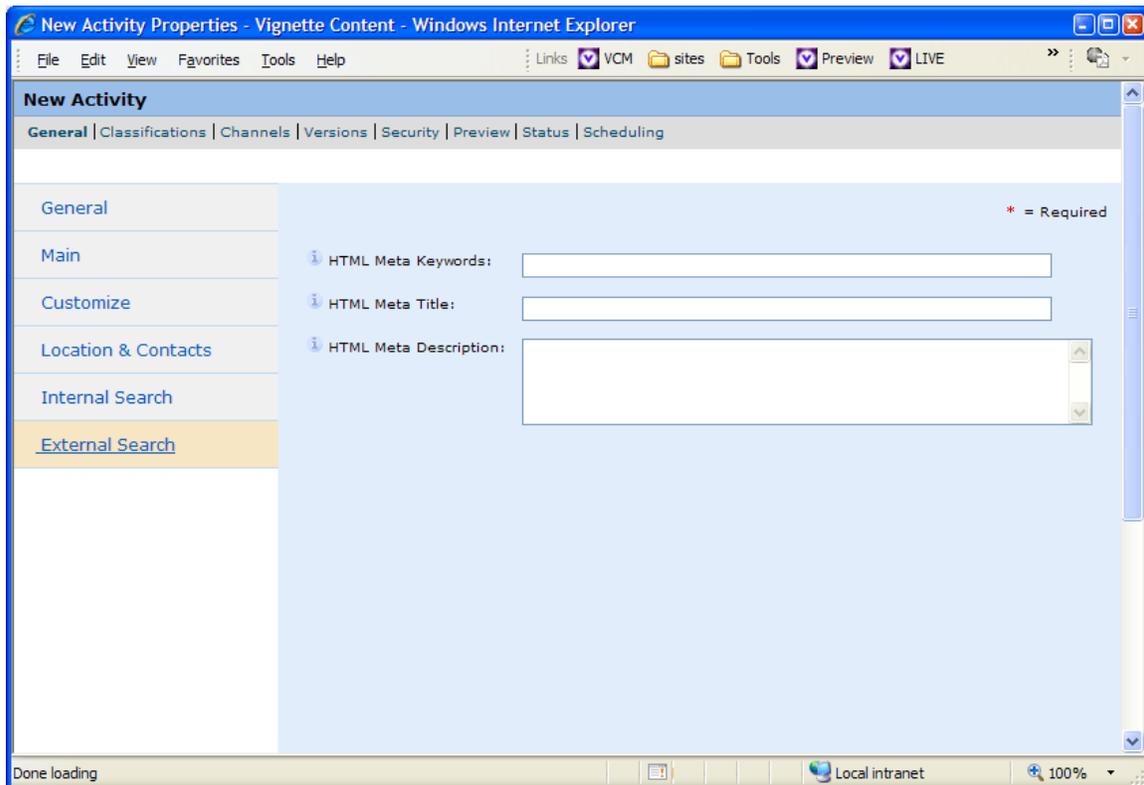


8. From the left-hand navigation, go to the External Search screen.

Add Meta Information that is used by external search engines (such as Google and Yahoo!) to locate content within the Vignette site.

An example Meta Title would be the title of the Activity.

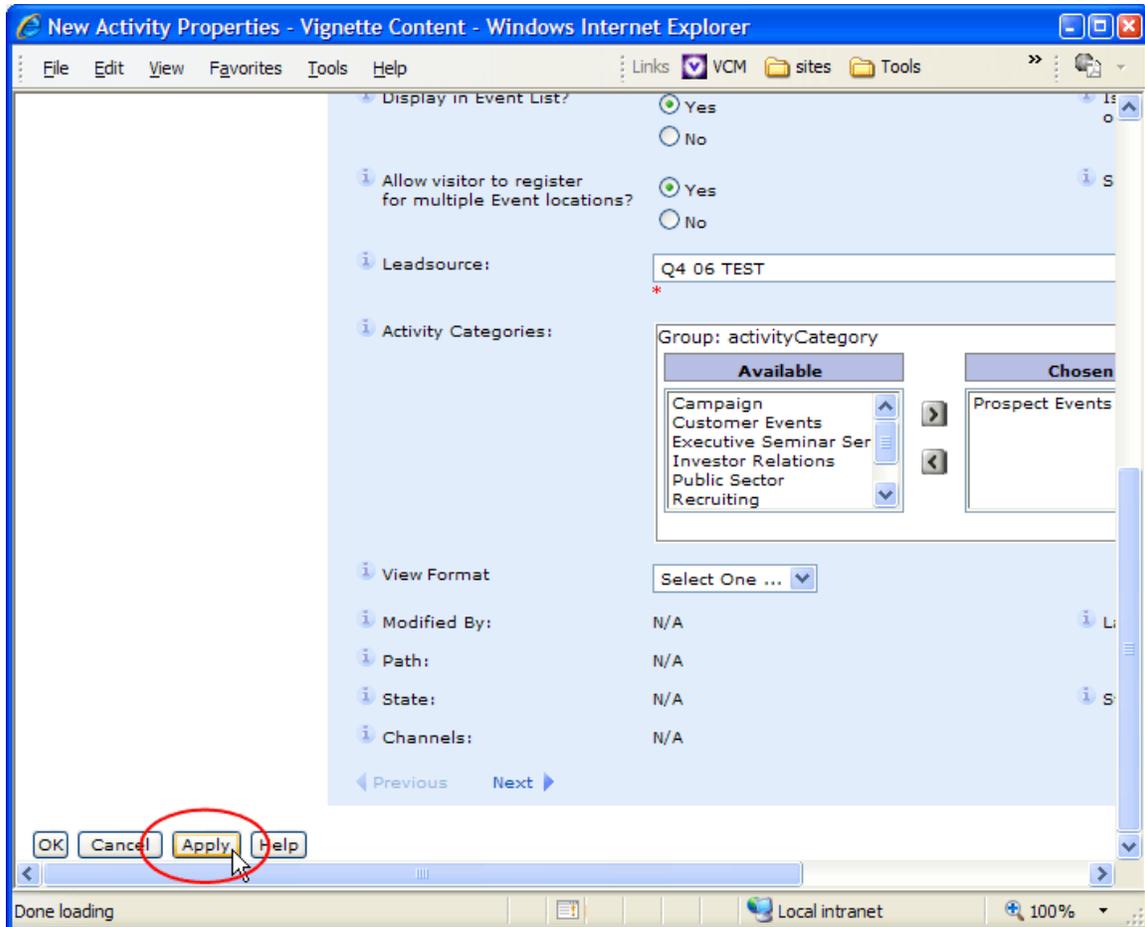
An example Meta Description would be a short summary of the Activity's content. This could also double as the Activity's Summary, which is displayed by the internal site search engine.



9. Save the new Activity.

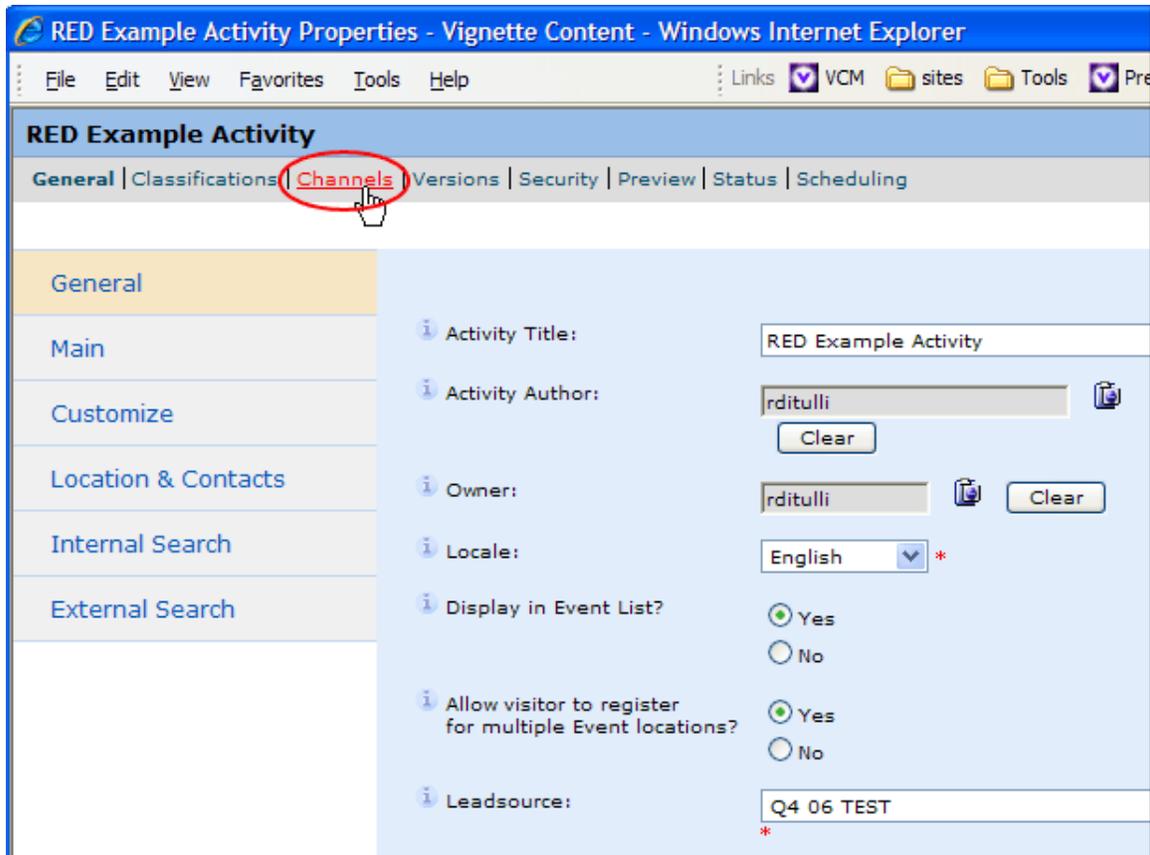
After all of the data is entered, click the **Apply** button on the General screen to save your changes.

NOTE: Both “Apply” and “OK” will save your changes. However, clicking the **OK** button will close the Activity window while clicking the **Apply** button will leave the window open on your screen.



10. After the Activity is saved, associate it to a Channel.

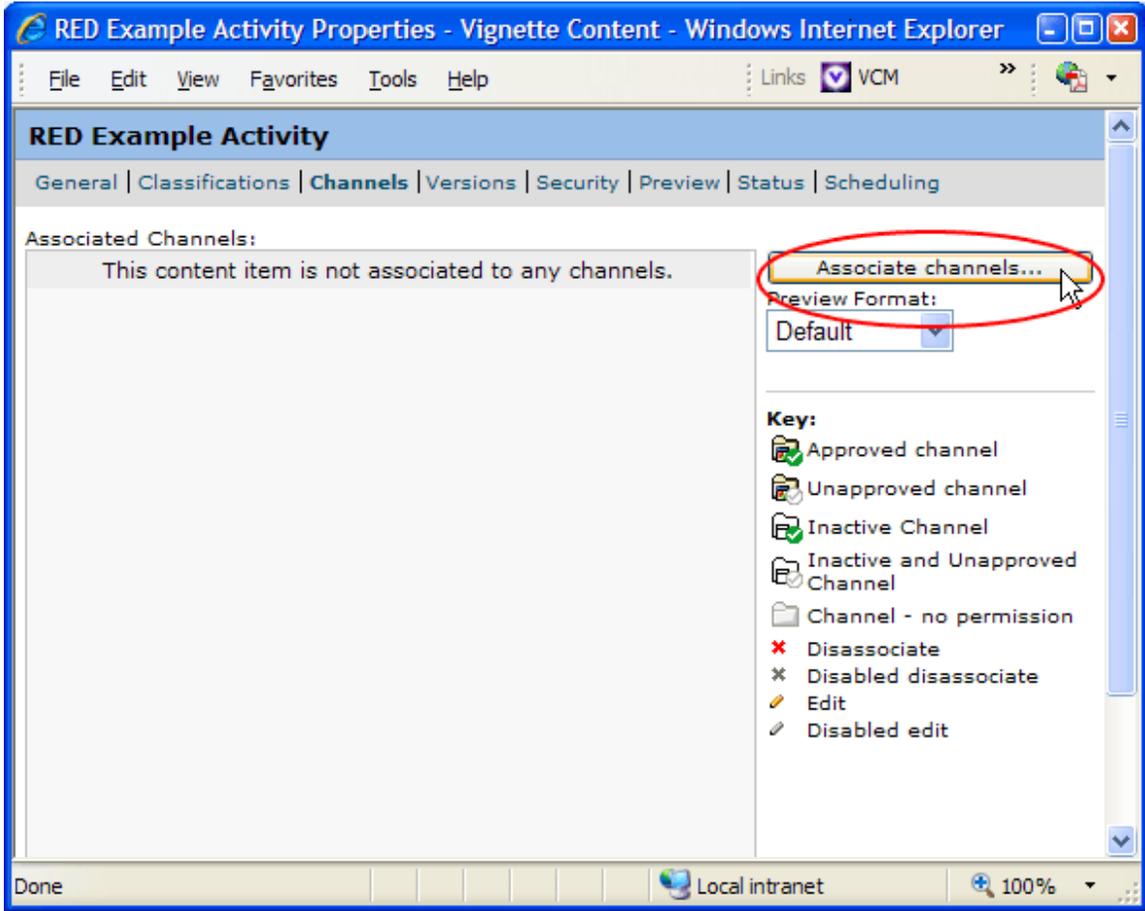
- a. Click the **Channels** link at the top of the Activity window. *The screen refreshes.*



The screenshot shows a web browser window titled "RED Example Activity Properties - Vignette Content - Windows Internet Explorer". The browser's address bar and menu bar are visible. The main content area is titled "RED Example Activity" and has a navigation bar with tabs: "General", "Classifications", "Channels", "Versions", "Security", "Preview", "Status", and "Scheduling". The "Channels" tab is highlighted with a red circle and a mouse cursor pointing to it. Below the navigation bar is a sidebar with a list of tabs: "General", "Main", "Customize", "Location & Contacts", "Internal Search", and "External Search". The "General" tab is selected. The main content area displays several form fields for activity configuration:

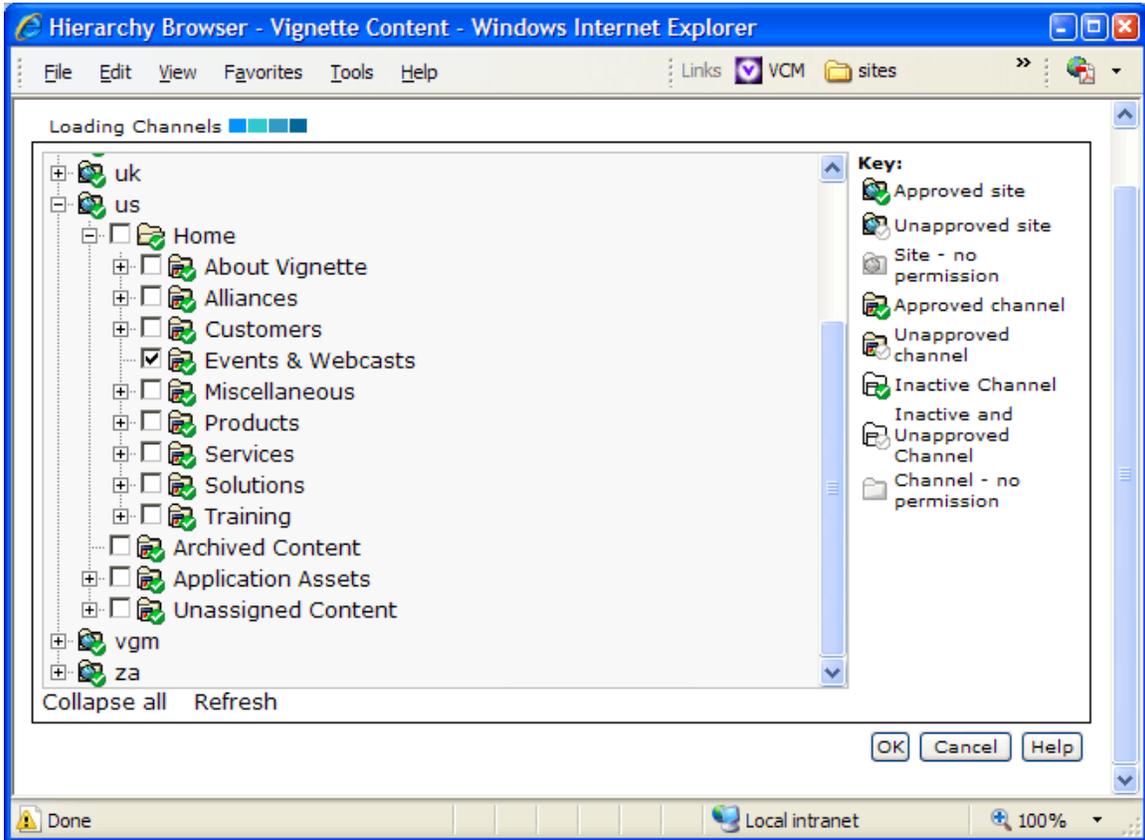
- Activity Title: RED Example Activity
- Activity Author: rditulli (with a "Clear" button)
- Owner: rditulli (with a "Clear" button)
- Locale: English (dropdown menu with a red asterisk)
- Display in Event List?: Yes, No
- Allow visitor to register for multiple Event locations?: Yes, No
- Leadsources: Q4 06 TEST (with a red asterisk)

b. Click the **Associate channels...** button. *A new window opens.*



- c. Drilldown to find the correct channel and select it. In this example, the Activity will be associated to the **Events & Webcasts** channel on the US site.

Note: You may drilldown to and select multiple channels. This method is useful when needing to associate the Activity to more than one channel.

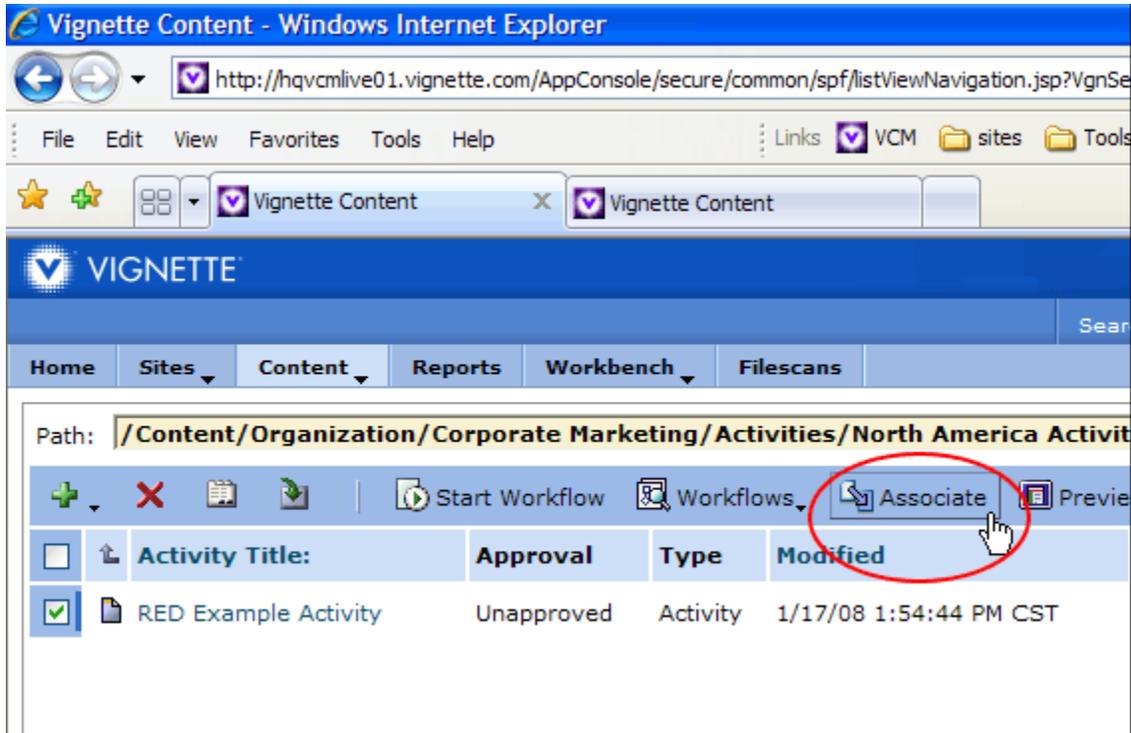


- d. Click the **OK** button to associate the Activity to the selected channel. *The screen refreshes.*
- e. Optionally, associate the Activity to more channels.

Note: Event and Webcast Activities should always be associated with the us > Home > Events & Webcasts channel as well as the vgm > Home > News & Events > Corporate Events channel.

- f. Click the **OK** button on the Activity window. *The window closes.*

- g. The Activity can be associated to Channels from the VCM Console, if it is not open.
 - i. From within the VCM Console, select the checkbox next to the Activity name and click the **Associate** icon. *A new window opens.*

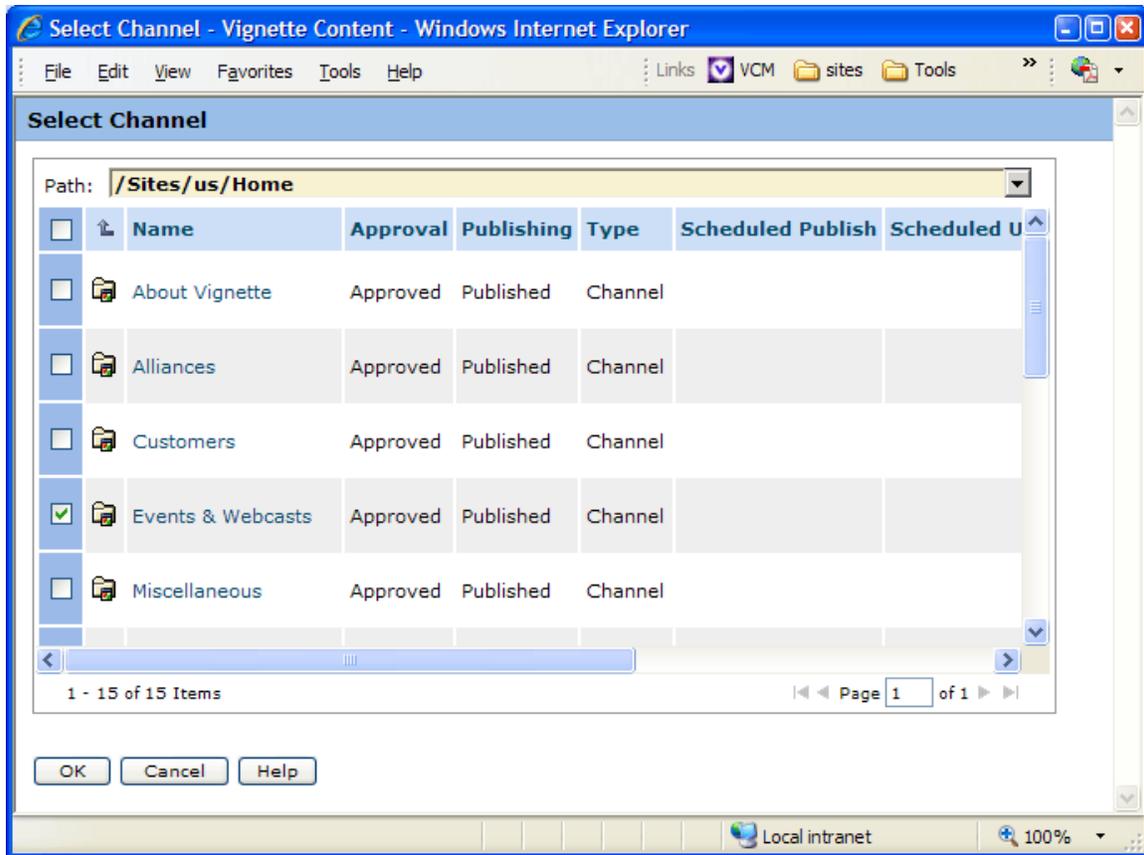


- ii. Drilldown to find the desired channel. In this example, the Activity will be associated to **Events & Webcasts** channel on the US site.

Note: Only one channel at a time can be associated in this manner.

- iii. Click the checkbox next to the desired channel.

Note: This method is useful when needing to associate multiple Content Items to one Channel.



- iv. Click the **OK** button to associate the Activity to the selected channel. *The new window closes and the VCM console screen refreshes.*

Note: All Event and Webcast Activities should be assigned a Scheduled Unpublish date and time. This date should correspond with the **End Date** assigned in the Activity’s Event Location. This ensures that the Activity is removed from the site when the event or Webcast is no longer valid. Only once the Activity is unpublish will it no longer be accessible.

See the [Schedule Unpublish](#) documentation in **Harmony** for more assistance.