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Content Management at OSIsoft

1. Purpose

This procedure documents how we maintain current, accurate content in Qvidian Proposal Automation (QPA).

It is important to keep this document current and accurate. If you have write access to this document and to QPA, you share the responsibility to document procedures improvements as they happen.

2. Summary

3. Roles and Permissions

QPA requires that the user have permission to do anything. Permission can be assigned individually. Permissions can be grouped into user roles. A **user role** is a grouping of users who are granted identical QPA permissions. Roles determine who can do what. A user may belong to multiple groups.

There are three categories of permissions:

- Application Permissions
- Document Type Permissions
- Template Permissions

The roles that apply to content are the Application Permissions. The QPA permissions that we use at OSIsoft are documented in [Roles Matrix.xlsx](#).

1. Content Owner

New Folder

This Permission provides the User or Role the ability to create new folders within the specified Library Folder. New Folder Permission details:

- The User or Role creates a new folder and is automatically designated as the owner of the new folder which implicitly gives that user the Manage Permission on the new folder.
- On the Properties screen, the User or Role has “read-only” access to folder properties and has no access to folder security or default content security.
- It does not provide the user/role with access to any content within the specified folder.

New Content

This Permission provides the User or Role the ability to create new content within the specified Library Folder using the Upload Content or Bulk Load Content folder operations. This permission also gives the ability to select the specified folder when submitting content from other functional areas of QPA (e.g., Office integrations, Projects, Architecting, etc.). New Content Permission details:

- User or Role that uploads or bulk loads new content is automatically designated as the owner of the new content, which implicitly gives that user the Manage permission for the new content.
- User or Role submitting content is not automatically designated as the owner of the new content. [Permissions Reference 39](#)
- On the **Folder Properties** screen, the User or Role has read-only access to folder properties and has no access to folder security or default content security.
- This permission does not provide the User or Role with access to any existing content within the specified folder.

Noteworthy points/reminders:

- Owner implicitly has the Manage permission.

Effects on Content Copies and Moves

- If copying just content, user doing the copy is set as the owner of the new content, new folder's default role and user permissions are applied to new content.
- If moving content, no permissions are changed; existing user/roles permissions remain.
- If copy folder, user doing copy is set as an owner of the new folder; new folder inherits the source folder's role/user permissions and its default

user/role permissions. If copy content is also indicated, content within folder(s) follows the first bullet in this section.

- If moving folder and same-named folder does not exist in target parent folder, no permissions are changed; existing user/roles permissions remain. Explicit content permissions within folder(s) are unchanged.
- If moving folder and same-named folder does exist in target parent folder, source folder's user/role and default user/role permissions are merged with existing target folder's. Explicit content permissions within folder(s) are unchanged.

Content Manager

A Content Administrator/Manager is someone who is responsible for managing the content that is stored in the QPA library. This may include loading, organizing, reviewing, and updating the content.

1. Purpose

Maintain clear, accurate, locatable, up-to-date content in QPA.

2. Accountability

- Review all Submitted content
- Enable content
- Retire clutter content (unused, obsolete, redundant, or poorly written)
- Coordinate content update
- Mine all proposals for reusable content; avoid dumping entire contents of the proposal into QPA, rather, use proposal content to update existing QAs
- Be the resource for performing challenging content search (know where the bodies are buried); refine search words or placement of content to make it easier to find
- Set and monitor review cycle for content

3. Tips

- Review content older than 18 months with zero uses as retirement candidates (retirement procedure pending)
- Spike a MS Word capability that is very useful for bulk updating exported content
- From LinkedIn Qvidian Community:

[Rick Griggs, AM,APMP](#)

We've struggled with "best practice" on this for a while. We're a very small proposal shop; there is no SME content review process in place, so it falls to my team to perform this analysis. For proposals, my current process is:

*1. My **QPA DBA** populates the initial proposal draft with applicable content from the DB*

CHALLENGE: honing responses from the DB at that point to avoid just having a "dump" of whatever content may be applicable and sorting it out in the next step

*2. My **senior proposal specialist** refines the first draft from the DBA, crafting responses which address the question/requirement, identifying questions for which we don't have current/solid responses, and noting potential new content before sending out to SMEs*

3. After incorporating **SME** edits and finalizing the proposal, **I will compare** the final document with the original sent to SMEs, creating a file which I label **_DIFF**, which identifies potential changes to DB content. I add my notes to the file for what I became aware of during the proposal process.

4. My QPA DBA compares this **_DIFF** file to the DB and updates accordingly

For updates to content that occur outside of a proposal (e.g., changes to the business), when I become aware of events that affect current content, or need to be captured for possible future content we can use, **I email it to my QPA DBA and have a folder set up in my Lotus Notes email where I collect such emails for future reference.**

4. Process

This suggestion from a LinkedIn post is a reasonable starting point. We will tweak it as we gain experience and feedback.

Updating QPA Metadata

1. Purpose

This procedure documents the metadata to update when you change existing content or upload new content.

You might update content to:

- Correct an error such as spelling or grammar
- Replace obsolete content
- Add reusable content from a response

This procedure is specific to OSIsoft and in addition to the upload content and edit content procedures of the current QPA release.

The documentation for the QPA procedures is in the **Qvidian Community > Learning Center > Content Manager**. There are tutorials, webinars, and Quick Reference Guides.

2. Before You Start

You must have **Manage Custom Metadata** permission to see or work with custom metadata. The **Proposals** role includes **Manage Custom Metadata** permission.

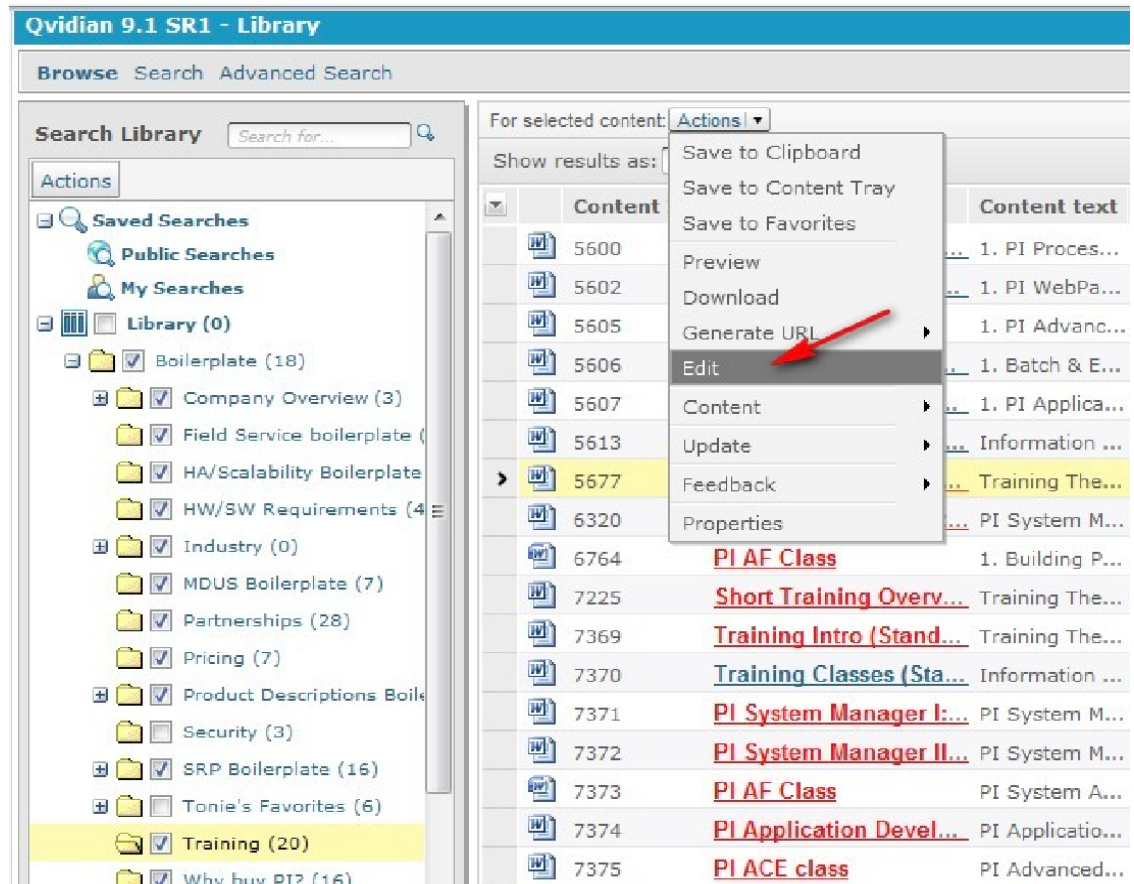
Proposals > Procedures > Qvidian Documentation as of 3-13-2014 folder contains the following quick reference guides, which have instructions and screen shots for working with metadata:

- Custom Metadata
- Maintaining Content in QPA

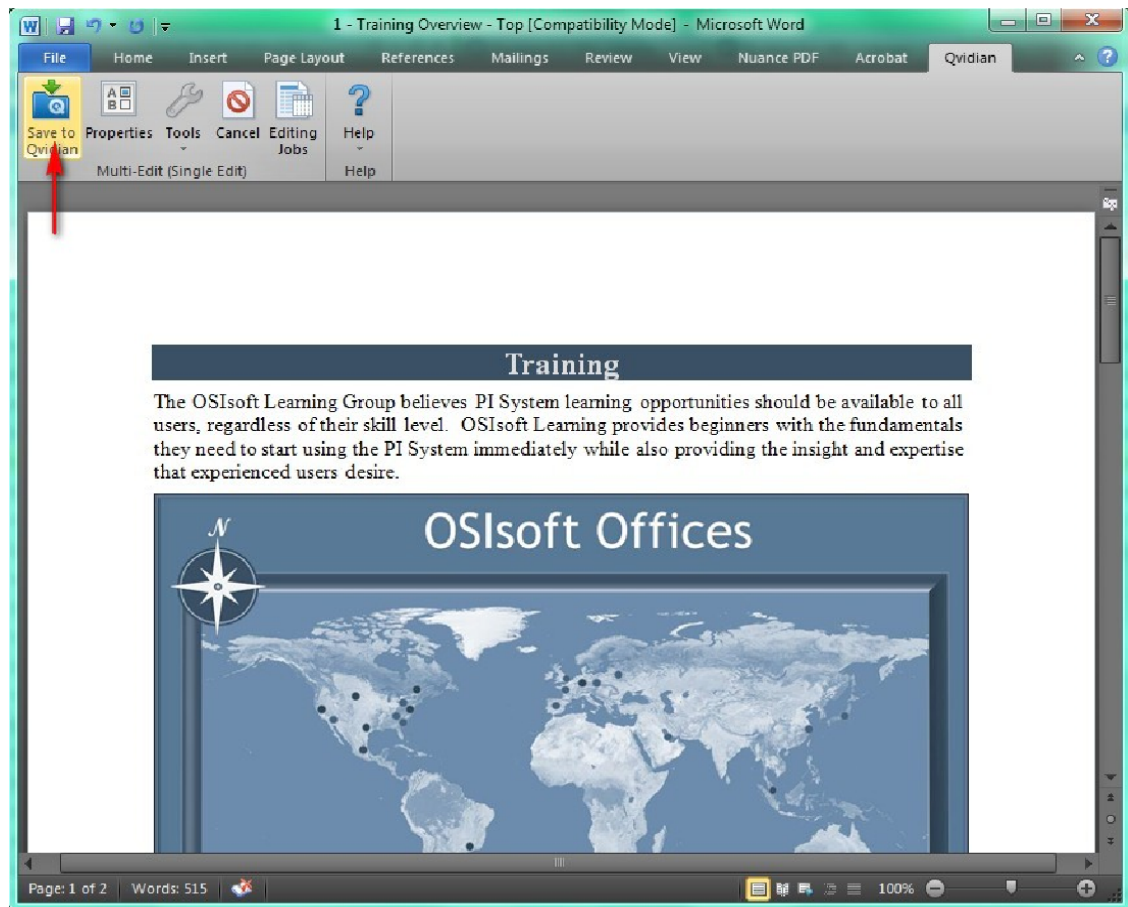
3. Summary

To update content:

3.1. Check out for edit



3.2. Make content changes and save



3.3. Complete metadata fields

The screenshot displays the Qvidian 9.1 SR1 - Library interface. On the left, a sidebar shows a tree view of the library structure, including folders like 'Boilerplate (18)', 'Company Overview (3)', 'Field Service boilerplate', 'HA/Scalability Boilerplate', 'HW/SW Requirements (4)', 'Industry (0)', 'MDUS Boilerplate (7)', 'Partnerships (28)', 'Pricing (7)', 'Product Descriptions Boile', 'Security (3)', 'SRP Boilerplate (16)', 'Tonie's Favorites (6)', 'Training (20)', and 'Why buy PT? (16)'. The 'Training (20)' folder is selected.

The main area shows a list of content items. A context menu is open for content 5677, with the 'Properties' option highlighted by a red arrow. The menu options include: Save to Clipboard, Save to Content Tray, Save to Favorites, Preview, Download, Generate URL, Edit, Content, Update, Feedback, and Properties.

The 'Content Properties' dialog box is open, showing details for Content ID 5677 Revision 8. The fields are as follows:

- Title: Training Intro (Standard Edit)
- Content text: Training
The OSIsoft Learning Group believes PI System learning opportunities should be available to all users, regardless of their skill level. OSIsoft Learning provides beginners with the fundamentals they need to start using the PI System
- Comments: 2/22/11 - reviewed & updated by Buck 2/5/10 updated & recolored to match new look and feel updated office locations graphic 8/18/10
- Contact info: Buck (David) Bard
- Restrictions: No Restrictions Password
- Expires on: 2/22/2012 3:00 AM
- Keywords: CBTs; training; learning; youtube; youtube...
- Alert text: Enter alert text...
- Review Cycle*: [empty field]
- Reviewed By: SME or other person who reviewed this content
- Last Review Date: [empty field]
- Source: Add: Proposal #, Name and date from a Miscellaneous folder, SME, OSIsoft, other source, such as Wikipedia

The 'Owner(s)' field is highlighted with a red box and contains the text 'Lindsey Doe; Tonie Flores'. The 'Alert enabled' checkbox is unchecked.

There are standard QPA metadata fields and custom OSIsoft-only metadata fields.

Metadata facilitates searches and makes it easier to maintain accurate up-to-date content. The extra minute it takes to enter the metadata will pay back exponentially.

The requirement for metadata is procedural, not technological. QPA lets you upload or update content without completing metadata fields. Some metadata fields default. The default may or may not comply with our requirements. A Content Manager will monitor updates for compliance with our metadata requirements.

Required fields are **Bolded**. Other fields are highly recommended. Use your judgment.

Standard Metadata

Field	Usage Description	Example
Enabled	Enables for search Restricted to users with Content Manager permission	
Submitted	Submits for approval Select this for content that is pending review.	
Title	Title that displays for the record Defaults to document title when you update new content Use your judgment on whether to change the default For QAs, repeat the question in the content	Company Overview or How old is OSIsoft? How old is OSIsoft? OSIsoft was founded in 1980.
Content Type		Accept default
Content text	View-only field	Requires no action

Field	Usage Description	Example
Comments	<p>Multiple uses:</p> <ul style="list-style-type: none"> • “Overview” “Description” or “General Content” if appropriate and not part of the title • Why an update is necessary <p>Always date and initial a comment</p>	Corrected a typo 12-12-12 TF
Contact info	<p>Name of the SME</p> <p>This person should review content updates</p>	Laurie Henders
Restrictions	N/A	Accept default
Expires on	<p>Do not use.</p> <p>Date that the content turns red to indicate that it needs an update</p> <p>One exception</p> <p>Content with time references, such as roadmaps and answers that required references such as “in 3Q2012” or “New.”</p>	<p>Do not use this field</p> <p>Leave this blank. Use custom Review Cycle field instead.</p>
Owners	Proposal team member	Mary Jones
Keywords	<p>Do not use.</p> <p>This is a vestige of earlier systems that were merged with the Qvidan product.</p>	<p>Do not use this field.</p> <p>Use Search terms instead.</p>
Search terms	<p>Think of this as an index entry that leads you to a record.</p> <p>When you search on a word, the content record is in the result list if the word is a search term of that record, even if the word is not in the record.</p>	<p>A record contains the word, ‘tag,’ but not the word, ‘point.’</p> <p>You want this record in the result list for “tag” or “point.” Add “point” to Search terms.</p>

Field	Usage Description	Example
Alert text	An alert message	Check with Gary before you use this.
Alert enabled	Click to display the alert symbol on the content record.	

Custom Metadata

These are OSIsoft metadata fields.

Field	Description	Example
Product version	Consider the possibility of one search to find all the related content to review for the next platform release. Be encouraged to use this field, although it is not required.	PI 2012
Review cycle (annually, quarterly, on new release)	Year and month to review this content for update	2/12/2013
Source	Proposal name and # or other identifier. Imagine a response that requires much of the same information as exists in a previous pursuit. Knowing the source of the response makes it easier to find all of the associated content.	P50-320 NE ISO or Pursuit and date for content that comes from a Miscellaneous folder EPM Korea 2012-11 or SME or osisoft.com or Wikipedia

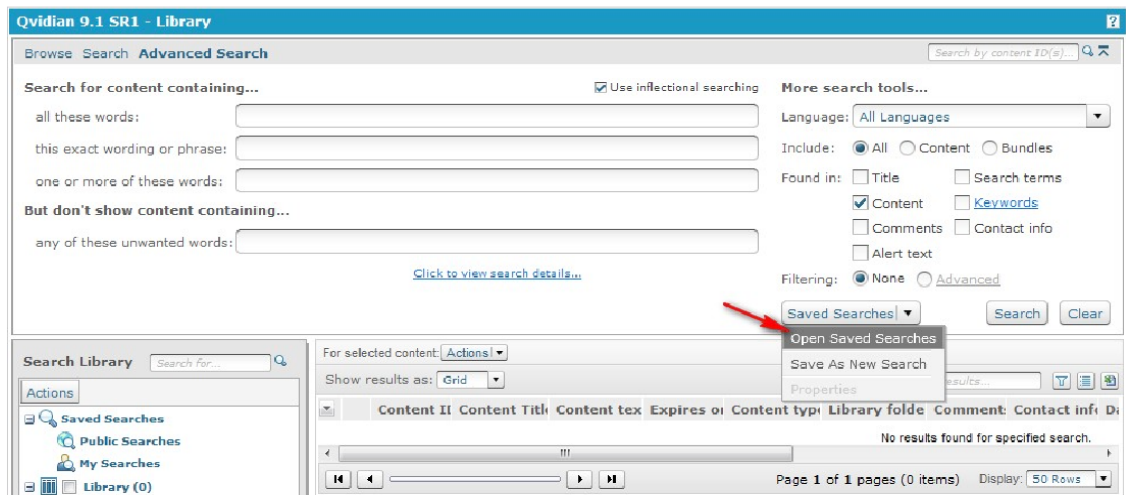
Field	Description	Example
Reviewed by	<p>Name of the person who reviewed this content</p> <p>Usually this is the SME; it might be a Proposals team member</p>	Todd Brown
Last review date	<p>The date that this content was last reviewed by a SME</p> <p>This is distinct from last used and last updated</p> <p>Leave it unchanged if no SME reviews your update, for example, if you correct a typo.</p> <p>Leave this blank if a SME has not reviewed the content.</p>	2011-4-17
Retired	<p>A checkbox that marks content that should not be used for one or more of the following reasons:</p> <ul style="list-style-type: none"> * It is obsolete * It is being revised * It is poorly written * It is of questionable accuracy <p>Click this checkbox when you retire a topic.</p> <p>Do not use this content, except perhaps to extract some elegant verbiage for reuse.</p>	T

4. Searching for Not Retired Content

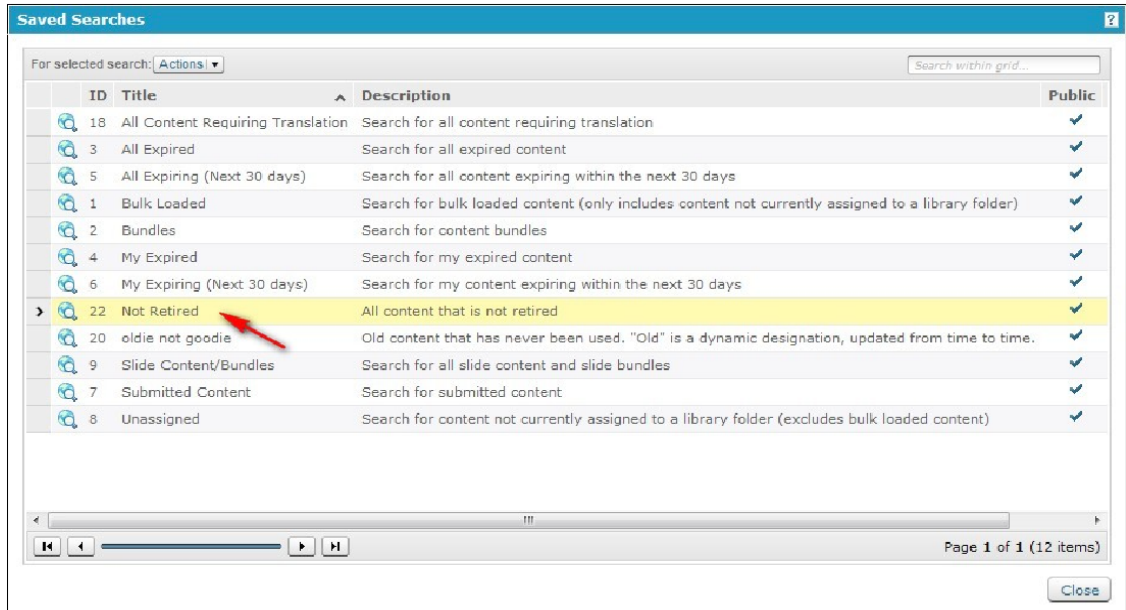
(Not working as expected, yet)

To search all folders except Retired Content:

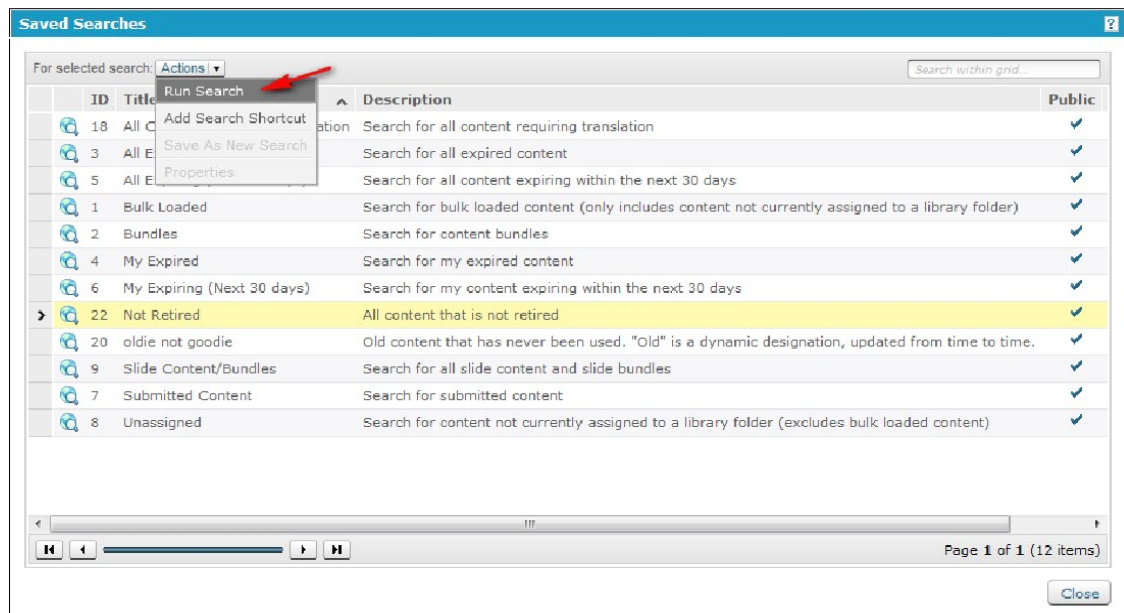
4.1. Open Saved Searches



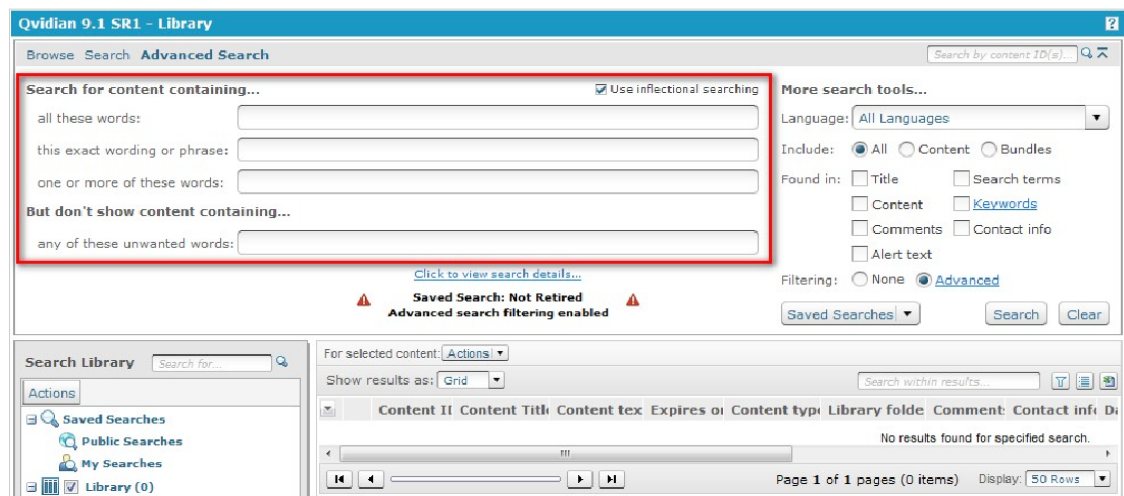
4.2. Select Not Retired



4.3. Actions > Run Search



4.4. Enter additional criteria



5. Before You Start

Use the Feedback function to leave a message for the Content Manager.

See **Proposals > Procedures > Qvidian Documentation as of 12-12-12 > Managing Feedback.**

Update Progress

This is a central listing of update initiatives – not individual files, but deliberate agenda to improve content and structure.

Date	Who	What
12-3-2012	Tonie	Exported and retired First 250 of 1005 items created before 11/1/2010 and times used = 0. This is a saved search, oldie not goodie . I am mining them for worthwhile content that I will add to the QA2013 folder structure.
12-12-2012	Tonie	Used > 10
2-13-2013	Tonie	2014 expired items remain.
6-26-2013	Tonie	QAs is empty, except for aaaObsolete.