

SPOTDocs How To Guide Part I: Navigating and Using SPOTDocs

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SPOTDocs How To Guide – Navigating and Using SPOTDocs

Description: How to navigate SPOTDocs and find information.

Audience: Anyone using SPOTDocs.

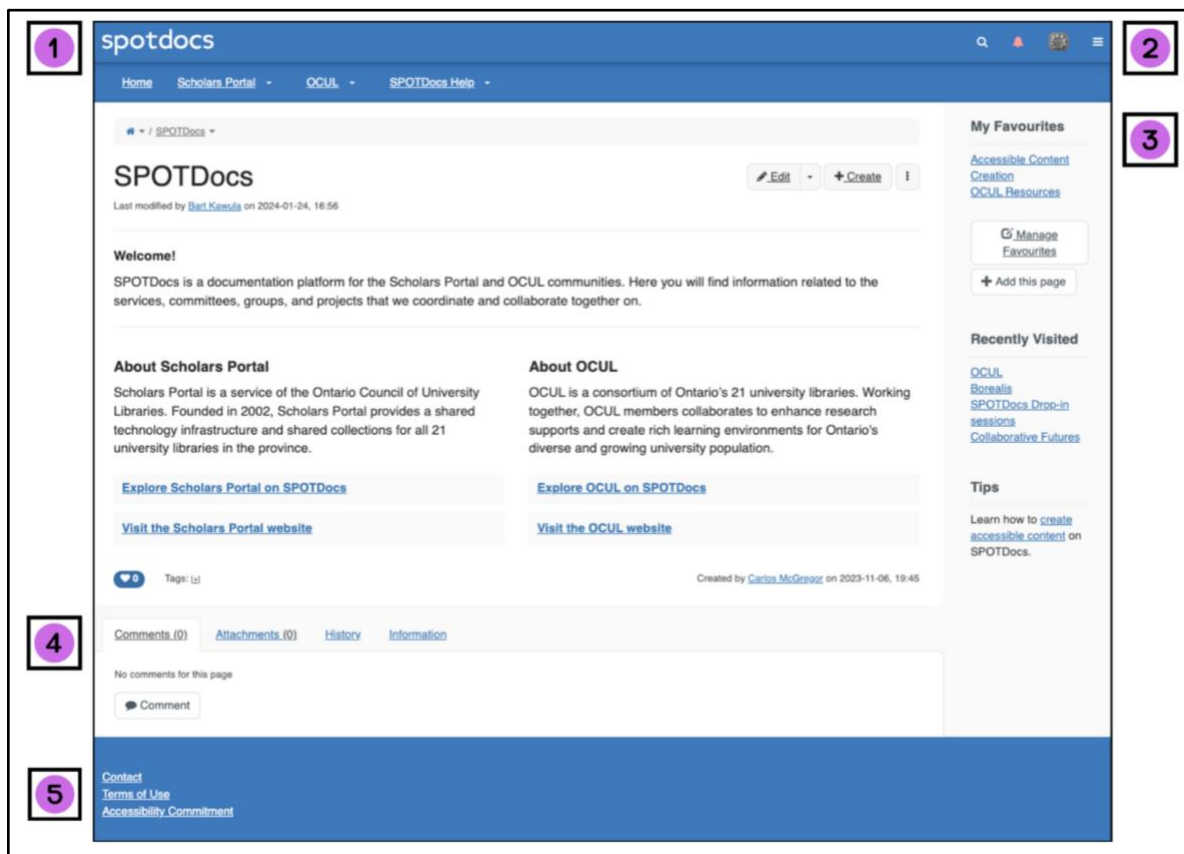
Welcome to SPOTDocs - we're glad you're here!

In this guide, you will find an introduction to the SPOTDocs and an overview of how you can use the platform to find and share information.

Part II of the guide covers creating and editing content in SPOTDocs and can be accessed from the [How To Guidance](#) in the SPOTDocs Help area.

Navigating SPOTDocs

Here's what you'll see (and where you can go) from the homepage, or any page in SPOTDocs:



1. Main navigation


Header

- Click the header logo on the top left corner of any page to go to the SPOTDocs homepage.




Horizontal navigation bar

- **Home**
 - Click 'Home' will take you to the SPOTDocs homepage.
- **Scholars Portal**
 - Click 'Scholars Portal' to go to the Scholars Portal landing page.
 - Click the down area to the right of 'Scholars Portal' to select from a list of Scholars Portal services and resources.
- **OCUL**
 - Click 'OCUL' to go to the OCUL landing page.
 - Click the down arrow to the right of 'OCUL' to select from a list of OCUL categories and resources.
- **SPOTDocs Help**
 - Click 'SPOTDocs Help' to go to the SPOTDocs Help landing page.
 - Click the down arrow to select from a list of support and resources provided for using SPOTDocs.
- **Directory**
 - Click the Directory to view a directory structure for the wiki. Any pages you have access to will appear in the Directory list.
 - Click the arrows to expand the structure and view nested pages.

Home menu

- Appears between the main horizontal navigation bar and the page title, and displays your location within the wiki.
- Click on pages in the  home menu to navigate from the current page to a desired parent (higher-level) page.

2. Upper-right navigation and login area

- **Search**
 - Click the  magnifying glass icon to slide open the search bar.
- **Notifications**
 - Click the  bell icon to open the notifications menu.
- **Profile**
 - Click the  profile icon to visit your user profile.

- **Drawer menu**
 - Select the ☰ hamburger icon (button with three stacked dashes) to the right of the profile icon to open a drawer menu with options to log in or log out, view the User directory, and toggle between available languages for the page content.

3. Rightmost panel

- **My Favourites**
 - Displays any pages you have bookmarked and provides options to bookmark the current page ('Add this page') or change your current bookmarks ('Manage Favourites').
- **Recently Visited**
 - Displays your most recently visited pages during your current SPOTDocs session. This panel will appear once you start navigating to pages in the wiki.
- **Tips**
 - Displays a rotating selection of tips for using SPOTDocs.

4. Bottom-left page tab menu

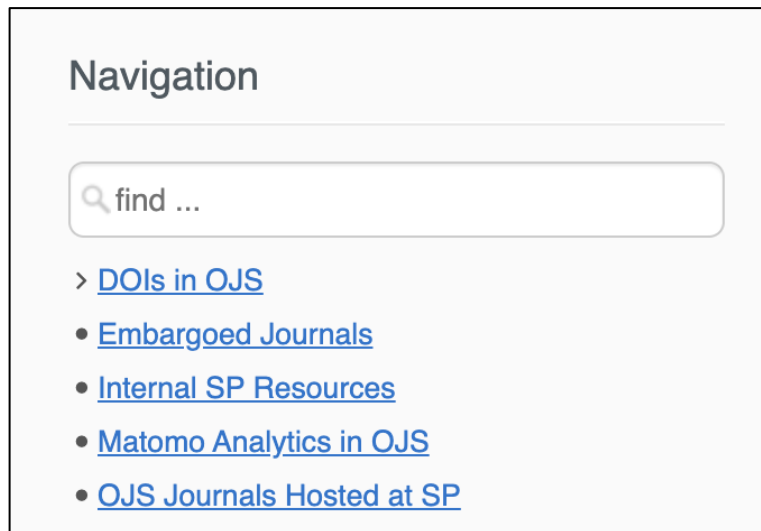
- **Comments**
 - Displays any comments added to a page.
- **Attachments**
 - Displays a list of any attachments added to a page.
- **History**
 - Displays the history for the page.
- **Information**
 - Displays information about the page, including the content language and backlinks to the page from elsewhere in the wiki.

5. Footer menu


- **Contact**
 - Links to Contact form for SPOTDocs.
- **Terms of Use**
 - Terms of Use for Scholars Portal.
- **Accessibility Commitment**
 - Accessibility commitment statement for the SPOTDocs platform.

Within a space

When you are in a specific area (space) on the wiki, a left-most navigation panel will appear with the following information:




- **Side navigation menu**
 - Hierarchical navigation menu that displays all pages within the area (space) you are in.
 - An arrow to the left of a page title indicates this page has child pages nested underneath. Click the arrow to expand or collapse the page tree.
- **Finder search bar**
 - Finder tool that searches for the location of a page within the navigation tree.
 - Begin typing a page title into the finder bar to view a list of suggested results. When a result is selected, the finder will open to its location within the navigation menu and highlight the page. From there, click the page title in the menu to load the page.


 *Note: The space navigation menu does not appear on the main landing pages for SPOTDocs, Scholars Portal and OCUL.*

On any page*

This page menu is located to the right of the page title and displays options for page actions.

- **Edit**
 - Select the 'Edit' button to edit the current page.
- **Create**
 - Select the 'Create' button to create a new sub-page under the current page you are on.
- **Page Actions menu**

- Click the  Page Actions menu (button with three stacked dots) to the right of the 'Edit' and 'Create' buttons to open a drop-down list of additional page actions (e.g., Copy, Move/Rename, Delete, Export).
- The Page Actions menu includes options to view comments, attachments, page history and information, which are also accessible from tabs at the bottom-left of the page.

 *The display of 'Edit', 'Create' and Page Action options depends on permissions. For example, the 'Edit' button will not appear for those with read-only access.*

Finding and accessing information in SPOTDocs

How information is organized on SPOTDocs

Information in the wiki is organized into three main categories, each of which can be accessed on any page from the horizontal navigation menu.

1. **Scholars Portal**

This area of the wiki encompasses working areas, documentation, and resources related to the delivery of Scholars Portal services.

From the Scholars Portal landing page, you can navigate to the following subsections:

- **Scholars Portal Services**
 - Select the desired service from the list to visit the dedicated area for the service in SPOTDocs.
- **Scholars Portal Resources**

Most Scholars Portal sections are open to all SPOTDocs users with some pages publicly available (no login required), except for some Service areas and pages that are restricted to staff, group members, and/or Service subscribers.

2. **OCUL**

This area of the wiki encompasses working areas, documentation, and resources produced by and provided to OCUL groups.

From the OCUL landing page, you can navigate to the following subsections:


- **Collaborative Futures**
 - Access the Collaborative Futures area.
- **AIML**
 - Access the AI and Machine Learning Program area.
- **Council**
- **Committees**
 - View and select from a list of OCUL Standing Committees.
- **Communities**
 - View and select from a list of OCUL Communities.
- **OCUL Resources**
 - View and select from a list of resources for OCUL members.

The majority of OCUL areas on the wiki are open to SPOTDocs users from OCUL member schools, except for some areas and pages that are restricted to specific OCUL sub-groups. A small percentage of OCUL Community areas and pages are

open to non-OCUL users who are members of that Community.

3. SPOTDocs Help


This area of the wiki provides training materials, resources, and support for using SPOTDocs. The SPOTDocs Help area, except for guides geared at staff and wiki administrators, is open to all SPOTDocs users.

 *Restricted content does not display in navigation menus and is omitted from search results. Read the [Requesting access](#) section of this guide for options to request access to a particular area or page on SPOTDocs.*

Searching in SPOTDocs

The search bar can be accessed from any page by clicking the magnifying glass icon in the top right menu. The SPOTDocs search application (Solr) searches both page and attachment titles, and content within pages and attachments. By default, search results are sorted by relevance. There are also options to filter search results by title, location, language, date, and author.

- Begin typing in the search bar to open a drop-down list with suggested pages and attachments.
- Click 'Go to search page' from the drop-down list to view more results.
- Add search facets by selecting filters from the 'Refine your search' menu to the right of the search results.
 - To search within a specific area or space on the wiki, select the 'Location' facet under the 'Refine your search' menu. Select 'SPOTDocs', then select the desired sub-page (Scholars Portal, OCUL, or SPOTDocs Help). A list of related areas (spaces) will appear that you can choose to search within.
 - Example 1: SPOTDocs > Scholars Portal > Permafrost
 - Example 2: SPOTDocs > OCUL > Collaborative Futures > Working Groups

 *Searching in SPOTDocs will only return results for pages and attachments that you have access to. If you are having difficulty finding information in SPOTDocs, please email docs@scholarsportal.info or contact the relevant Scholars Portal and OCUL staff member.*

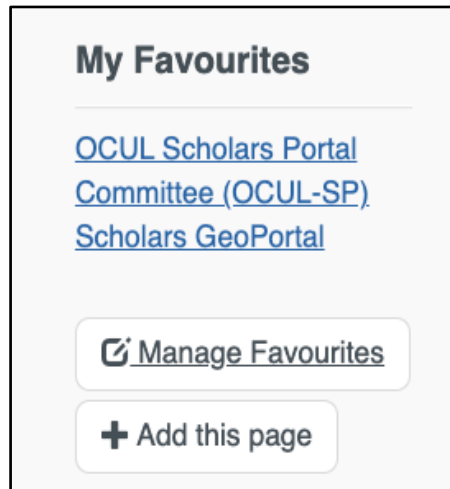
Requesting access to an area or page on SPOTDocs

Scholars Portal and OCUL staff members can grant access to areas and pages within SPOTDocs.

If you require access to an area or page on SPOTDocs or receive an 'Error: Restricted content' message when visiting a page, we recommend completing the [Request Access](#) form or contacting the relevant Scholars Portal and OCUL staff member.

Bookmarking pages (My Favourites)

SPOTDocs has a 'My Favourites' panel that allows you to bookmark pages you visit frequently. This panel appears on the right side of any page.



When you are on a page that you want to bookmark for easy access, select "Add this page" in the 'My Favourites' panel. This page can now be accessed directly from the rightmost panel on any page, anytime you visit SPOTDocs. You can also add a page by selecting the 'Manage My Favourites' button and entering a page title to view a list of suggested pages. Given the number of similarly named pages across the wiki, it's often easier to go with the first route (adding the page when you are on the page itself).

Select the 'Manage My Favourites' button to remove any pages you have bookmarked. To delete a bookmark, select the page name and click the backspace or delete key on your keyboard. Click 'Save' to register your changes (this may take a few seconds).

Creating and editing content

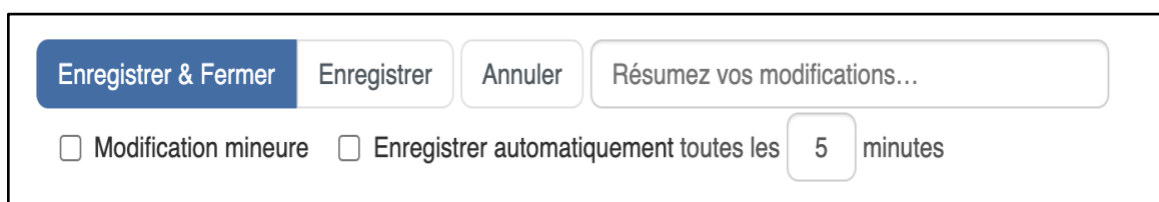
We recommend reviewing Part II of the How To Guide, which covers creating and editing content in SPOTDocs and is available from the [How To Guidance](#) page in the SPOTDocs Help area.

SPOTDocs in French

Changing the SPOTDocs interface display


The majority of the SPOTDocs interface is available in French. Select page content on the wiki (primarily pages in the Borealis, Odesi and Ask a Librarian areas) have been translated in French by SP Service teams.


Page editing buttons in French (Canada) language:



By default, the interface language that displays when logging in to SPOTDocs is set by your browser.

To change the SPOTDocs interface language:

- Select the  hamburger icon (button with three stacked dashes) to the right of the Profile icon to open the drawer menu.
- Under the 'Global' section, click the 'Languages' or 'Langues' link to display and select between available languages for the page.

 *Currently, if a French translation has not been added to a page, the French language option will not display under the 'Global' section. This is a known issue that we hope to resolve shortly. In the interim, you can activate the French interface by adding ?language=fr_CA to the end of a URL.*

For example: https://docs.scholarsportal.info/view/?language=fr_CA.

Viewing SPOTDocs content in French

Automatic page translation is currently not supported by the platform. Certain page content on SPOTDocs has been translated by Scholars Portal staff and members of the SPOTDocs community. This includes some user-facing pages in the Borealis, Odesi and Ask a Librarian areas.



When a translation is available for a page, a 'Français' button will appear to the left of the

page menu. Click the button to view the translated content. Click the 'English' button to view the page content in English.



By default, the interface will also change to display in French when you are on a page that has been translated in French. The default language will be set by your browser and can be adjusted by [changing the interface display](#).

Reporting issues with migrated content



As you navigate SPOTDocs, you may find that some migrated content does not display exactly how it did in the previous SPOTDocs platform. This can happen for several reasons and may be attributed to how the content was originally created or formatted, minor incompatibilities between the previous platform (Confluence) and our current one (XWiki), and/or unexpected errors during the migration process. Scholars Portal and OCUL staff, led by the SPOTDocs support team, are working to correct these issues as we encounter them.

If you notice any missing or broken pages (i.e., pages that display the message: 'Page could not be found'), please email docs@scholarsportal.info so we can correct this error.

If you have difficulty finding or accessing content on the new platform, please email docs@scholarsportal.info, the relevant Scholars Portal Service lead, or ocul@ocul.on.ca.

Modifying your user profile

In the User Profile section, you can upload or change your profile photo or edit your personal information. Note that usernames cannot be changed.


- From the landing page, click the User Profile icon in the top-right corner of the page to be directed to your profile.
- **To add or change a profile photo**
 - Select the  pencil icon beside the profile icon.
 - Select 'Choose file', upload a photo, and click 'Upload and select'.
- **To edit your personal information**
 - Select the  pencil icon in the rightmost corner of the Personal Information box.
 - Edit your details and click 'Save & View'.

Setting up/modifying your notification settings

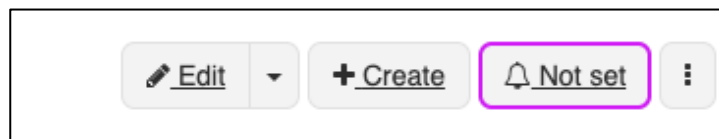
The default notification settings in SPOTDocs are:


- User mentions are turned on.
 - Users will receive an email and in-platform alert when their user account is tagged on a page.
- All other notifications are turned off.

There are three ways to view and edit your notifications:

- A. To follow/unfollow a page, click the  bell icon on the top right corner of the page.

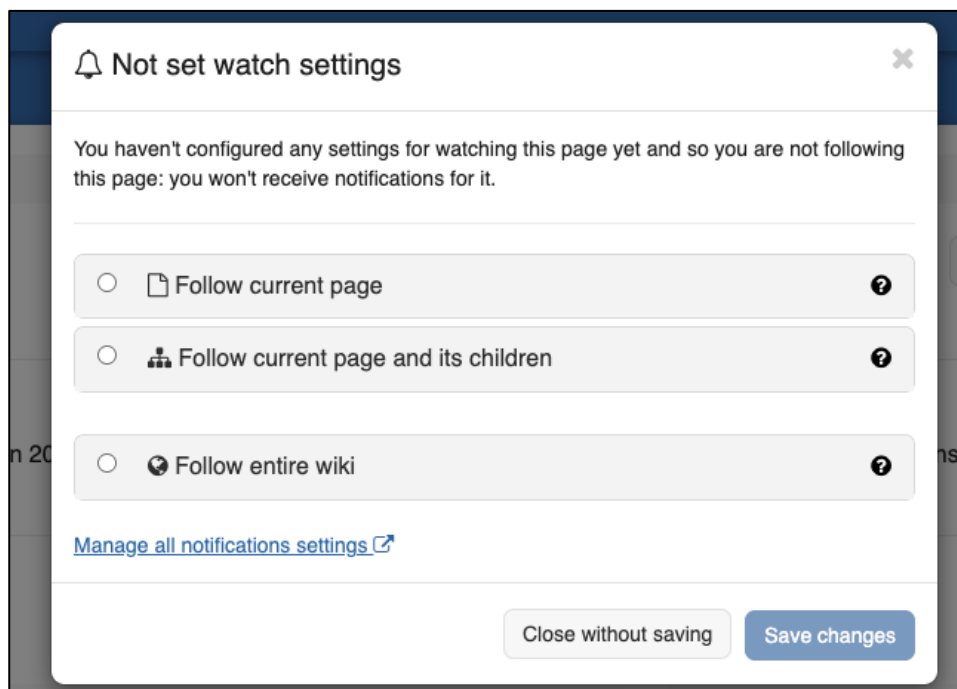
Any pages that you are not following will show a 'Not set' status:



To follow a page, click the  'Not set' button to open a popout window with notification options.

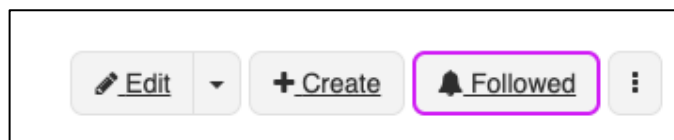
The options are:

- Follow the current page
- Follow current page and its children
- Follow entire wiki (note: not recommended)

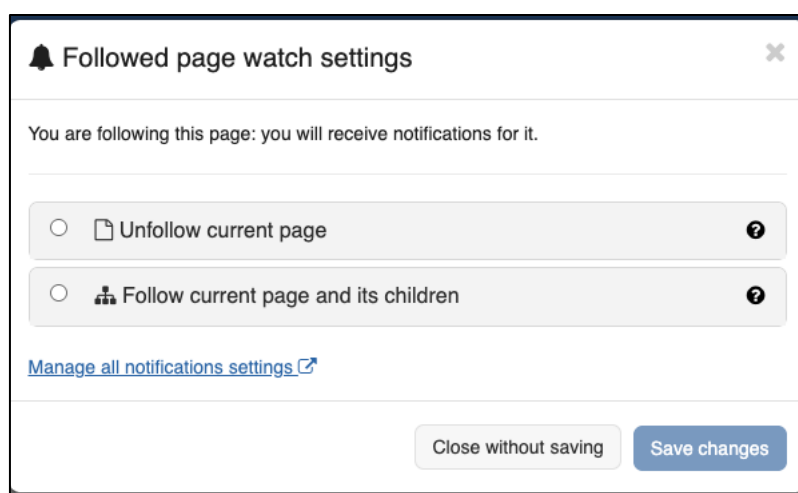


Select the radio button of the desired option and click the 'Save changes' button to record your preference. If you've selected a button but want to exit the window without registering the change, click the 'Close without saving' button instead.

Any pages that you are already following will show a notification status of **'Followed'**:



Click the '🔔 Followed' button to open a popout window with options to stop receiving notifications about the page.



To view, add or modify your notifications across the wiki, click the 'Manage all notification settings' link in the popout window to be directed to the Notifications Preferences section of your user profile.

B. Click the 🔔 button at the top right of the wiki to be directed to the Notifications area of your profile page.

Here you'll find options to specify automatic page watching (for pages you have edited) and set up in-platform alerts and emails for various applications (pages, user mentions, blogs, and page likes).

At the top of the page, the **Notifications Preferences** section includes options to set up automatic page watching and frequencies of email alerts.

Notifications Preferences

Watched Pages

AUTOMATIC PAGE WATCHING
Decide if you wish to watch a page after you have worked on it

Never

Email Preferences

EMAIL FREQUENCY
Choose how often you want to receive an email with the summary of what happened on the wiki.

Live

DETAILS OF THE CHANGES
Select the level of detail you want to receive about all the changes in the email.

Standard

Email preferences will only apply to notifications that are turned on.

Under the **Applications** section, you can also expand each application to set up more granular preferences (e.g., only receiving a notification if a page is modified or deleted).

Applications

This is the list of applications that can send notifications. You can enable or disable any of them.

Name	🔔 Notification menu The notification menu is located on the top right of the page, and you can see it by clicking on the bell (🔔)	✉ Email An email is sent to you regularly with a summary of what happened on the wiki	
📖 Blog	🔔 OFF	🔔 OFF	⏏
♥ Like	🔔 OFF	🔔 OFF	⏏
🔔 Mentions	ON 🔔	🔔 OFF	⏏
📄 Pages	ON 🔔	N 🔔 OF	⏏
A comment is posted	ON 🔔	🔔 OFF	
A new page is created	ON 🔔	🔔 OFF	
A page is deleted	ON 🔔	🔔 OFF	
A page is modified	ON 🔔	ON 🔔	

Click the caret button to view an expanded list of settings for a specific application.

Any pages that you are currently following will appear under the **Custom Filters** section. Toggle the **'Is enabled?'** button to follow/refollow the page.

Custom Filters
Create filters to control the notifications you want to receive. + Add filter

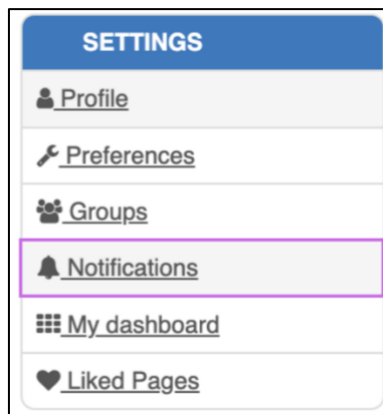
Entries 1 - 2 out of 2 per page of 10 page 1

Scope	Location	Filter Action	Events	Formats	Is enabled?	Actions
Page and children	Main / OCUL / CF	Notify of the event	All events (even disabled)	Alert Email	ON	Delete
Page only	Main / SP / Scholaris	Notify of the event	All events (even disabled)	Alert Email	ON	Delete

Note: Clicking 'Delete' under the Actions column will remove the notification preference, not delete the page.

C. Click the profile icon to be directed to your profile page and select the Notifications area.

Select 'Notifications' from the Settings menu to view, add or modify your notification preferences as described above.



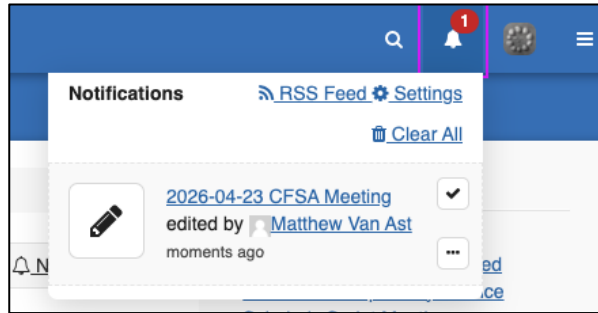
The notification settings in XWiki are robust, with a high degree of specificity. Many of these settings will likely not need to be changed from the default. If you have questions about how the notifications work, please email docs@scholarsportal.info.

Visit the [SPOTDocs FAQs](#) page for more information on how to 'watch a page'.

In-platform notifications

Once notifications are set up, the button will indicate if there are updates based on your preferences. For example, if you are following a page and have set up a notification to be updated when it is edited, a notification alert will appear when it has been edited.

Clicking the button will open a Notifications box with the most recent updates and an option to clear the notifications.



Requesting a SPOTDocs account

To request a SPOTDocs account for someone else, select '[Request an account](#)' from the drop-down menu under 'SPOTDocs Help' on the horizontal navigation menu to be taken to an external form. Alternatively, you can find the form linked from the [SPOTDocs Help](#) landing page. You can fill in the form or share this form with the person who is requesting an account. If you are filling the form on behalf of someone else, please include your name in the 'Name of requester' field.

Account requests are sent to the docs@scholarsportal.info inbox. A SPOTDocs team member will create the new account, add the user to any appropriate groups and assign permissions, and contact the new SPOTDocs member to provide login instructions.

Where to find more help

The [SPOTDocs Help area](#) has been designed with just this purpose in mind!

This section of the wiki can be accessed from the horizontal navigation menu and includes options to:

- Access the How To Guidance
- Read more about creating accessible content or report an accessibility problem
- Request an account or access to a restricted page
- Provide feedback about SPOTDocs

We aim to update our resources and training materials to reflect new features and developments on/around the wiki and communicate these changes to the SPOTDocs community on a regular basis.

We welcome your feedback on this guide and all things SPOTDocs-related. Please use the SPOTDocs [Contact Us form](#) to get in touch with our team.

Thank you!

- The SPOTDocs team