Complete Portal User Guide

Extranet Secure Portals Software User Guide

11-10110-010

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Section 1 – Contact Information

The NC4 Support Center is available to answer any questions regarding the portal or to provide a walk-through of the tools within the system.

The NC4 Support Center is available Monday through Friday, from 8am to 8pm EST.

Phone: 804-744-8800 or 1-877-624-3771

Email: helpdesk@nc4.us

Section 2 – Getting Started

System Requirements

Browser

To ensure proper functionality, use a recent version web browser such as Netscape Navigator or Internet Explorer. Maintain the latest version of any browser in order to keep security vulnerabilities to a minimum! The web browser must have 128-bit encryption and allow cookies in the browser and through the firewall.

128-bit Encryption

The browser should be a domestic version or an International version that supports the necessary encryption. International versions cannot always handle the strong encryption. (Note: Some later versions of Internet Explorer do not come with the 128-bit encryption installed and the separate High Encryption Pack must be downloaded.) Check with the manufacturer of the browser to verify the usage of the stronger encryption. Some countries prohibit stronger encryption packs.

Checking for Encryption

Netscape

1. Click on “Help” on the right hand side of the toolbar.
2. Select “About Netscape.”
3. If this page does NOT have the following information listed in bold in the middle of this screen then your browser does NOT support 128-bit encryption. **“This version supports high-grade (128-bit) security with RSA Public Key Cryptography, DSA, MD2, MD5, RC2-CBC, RC4, DES-CBC, DES-EDE3-CBC.”**
4. Please go to Netscape.com and download a current browser or High Encryption Pack.

Internet Explorer

1. Click on “Help” on the right hand side of the toolbar.
2. Select “About Internet Explorer.”
3. If the “Cipher Strength” is listed as anything less than 128-bit encryption then your browser does NOT support 128-bit encryption.
4. Please go to Microsoft.com and download a current browser or High Encryption Pack.

Cookies

Cookies must be allowed through the browser and firewall. A cookie is a small piece of information, often no more than a short session identifier that the HTTP server sends to the browser when the browser connects for the first time. Cookies cannot be used to steal information. They can only be used to store information that was provided at some point. Cookies are used to manage the site. Without cookies, the connection does not occur and users cannot navigate the site. To manage cookies in the browser, go to the “Preferences” or “Options” menu and select the ‘Select All Cookies” option.

Enabling Cookies

Netscape 4.X

1. Click on “Edit” on the right hand side of the toolbar.
2. Select “Preferences.”
3. Click on the “Advanced” tab.
4. Under “Cookie” heading, select “Accept only cookies that get sent back to the originating server” and click on “Okay” at the bottom.

Netscape 6.0+

1. Click on “Edit” on the right hand side of the toolbar.
2. Select “Preferences.”
3. Click on the “Privacy and Security” tab.
4. Click on the “Cookies” tab.
5. Select “Enable cookies for the originating website only” and click on the “Okay” button at the bottom.

Internet Explorer (IE) 5.0

1. Click on “Tools” on the right hand side of the toolbar.
2. Select “Internet Options.”
3. Click on the “Advanced” tab. In older versions of IE, the cookie setting will be under the “Security” tab.
4. Scroll to the “Security” heading and “Cookies” will be listed as a sub heading.
5. Select “Always Accept Cookies” and click on the “Okay” button at the bottom.

Internet Explorer 6.0

1. Click on “Tools” on the right hand side of the toolbar.
2. Select “Internet Options.”
3. Click on the “Privacy” tab.
4. Click on the “Advanced” button under the Settings area.
5. Click in the “Override automatic cookie handling” box. Under “First-party Cookies” and “Third-party Cookies” columns, select “Accept.” Click on the “OK” button and close out screen.

Registration

In the URL address line, type in the web address for the portal (Note the ‘s” in https:// - for Secure Socket Layer). It is recommended to bookmark this site or set it as the default Home page. In order to register for the

Portal, complete the 6-step registration process. The entire application must be completed to receive approval into the portal.

Contact your Organizational Administrator (OA) or the Support Center BEFORE registering to the portal. It is critical to obtain an Organizational ID to enter in during the registration process! Your OA is the point of contact for your group within the portal and more than likely the person who asked you to register to the portal.

Step 1: Click link to Register

1. At logon page, click the link that says, “If you were invited to join, click Here to register (see Figure 1.0).”
2. If the link is not on the logon page, an invite must be obtained from an administrator. That invite will contain a link, which will go directly into the first page of the registration or Step 2 in this process.

Figure 1.0 – Logon Page

Step 2: Create Username

1. Enter first name, last name, organization ID, and username. Fields identified with an asterisk (*) are required (see Figure 1.1).
2. The username must be between 3 and 40 characters. The username cannot:
3. Contain any spaces
4. Use any of the following special characters, as they will be stripped out upon processing: “#,” “&,” “<,” or “>.”
5. Once a username is selected, it can only be changed by Site Administrators. Please choose a username that is unique and not obvious to others.

6. Click on the “Continue with Registration” button.

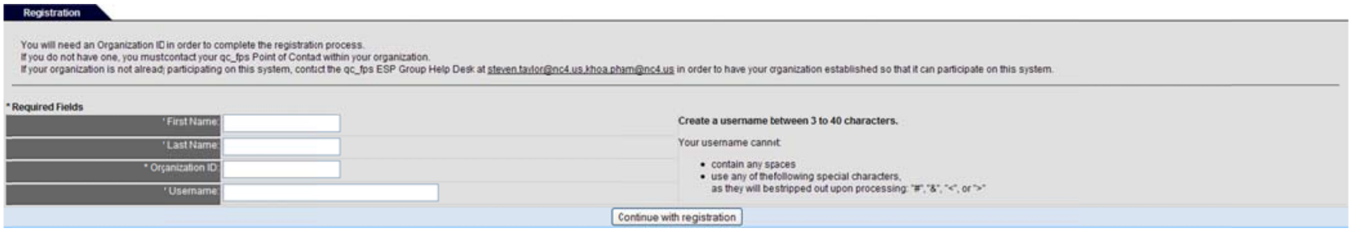


Figure 1.1 - Create Username

Step 3: Create Password/Select Security Questions

1. Enter a password. Re-Enter password for verification. The password must be: (see Figure 1.2)
2. Between 8 to 15 characters
3. Contain AT LEAST one upper case letter, one lower case letter, and one special character (such as an asterisk *, dollar sign $, or exclamation mark !).
4. Choose a unique password and avoid using personal information such as name, phone number, address or any other easily accessible information.
5. Select two security questions from the drop down list (see Figure 1.2).
6. Type the answers in the text box located under each question. These questions are used by the Support Center or other administrators for extra security if there is ever a problem with your account or if you unable to logon, so please provide answers that you can remember if needed.
7. Click on the “Continue with Registration” button to continue to the next step of registration.

Since strong passwords are not necessarily easy to remember, it is recommended to create a scheme. In the example in the song, “Twinkle, Twinkle Little Star”, type the first letter of every word within the line: ***Twinkle, Twinkle, little star, how I wonder what you are***

The password would be: ***ttlshiwwya****. To meet the password requirements, change some of the characters to a capital letter and a special character, with the final password becoming:* ***ttLsh!wwy@.***

Figure 1.2 - Create Password

Step 4: Enter User Information

1. Enter email address, phone number, fax number, text pager (email format), and employer information within the appropriate text boxes. Required information is marked with an asterisk (*) next to the field name (refer to Figure 1.3).
2. Click on the “Continue with Registration” button to submit the registration.

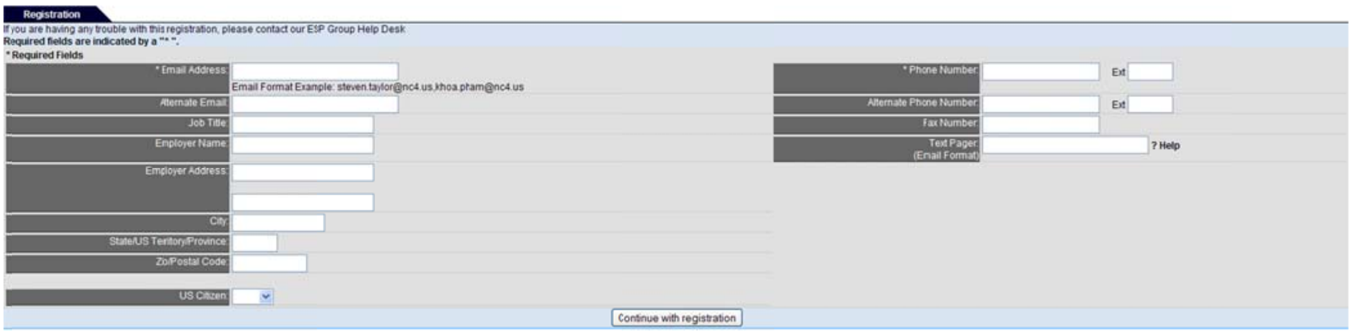


Figure 1.3 - Enter User Information

Step 5: Confirmation

1. After submitting the registration, a confirmation screen is displayed (see Figure 1.4).
2. As stated on the confirmation screen, the application process is not yet completed.
3. Check the primary email account provided in the registration for an email from this sender: notifications@espgroup.net.
4. Click on the hyperlink included in the email to complete the registration process (see Figure 1.5). If the link wraps into two separate lines, cut and paste the entire link into the URL bar of the browser. Click on the link one time. Do not double click or an error message is displayed (see Figure 1.7).
5. After clicking on the link, the registration is submitted for the appropriate reviews and approvals. The account has NOT been approved yet (see Figure 1.6).

Step 6: Approval

1. A final email notification is sent to the primary email address provided in the registration when the administrator has approved the account.

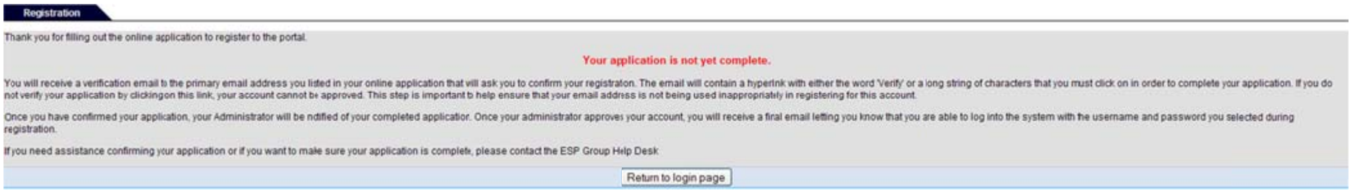


Figure 1.4 - Confirmation

Make sure the correct email address is entered to receive a confirmation of the registration. The confirmation-email is sent to the first email address list in the application. Contact the Support Center immediately if the email address is entered in error or if the confirmation-email is not received the same day of submitting the application.

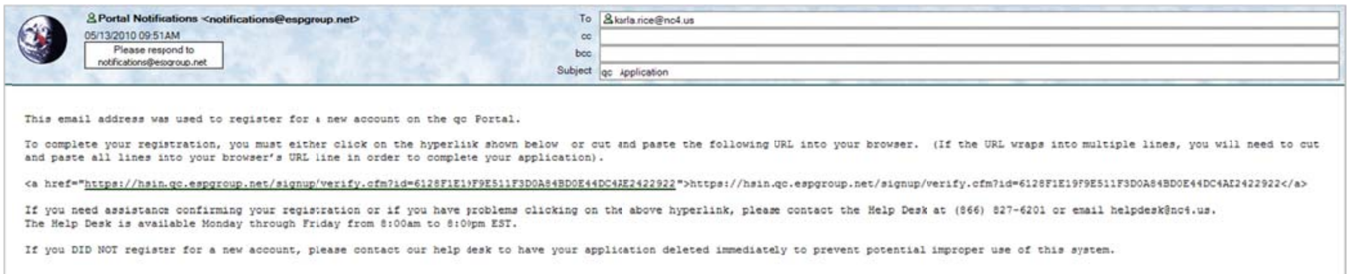


Figure 1.5 - Example of Confirmation Email

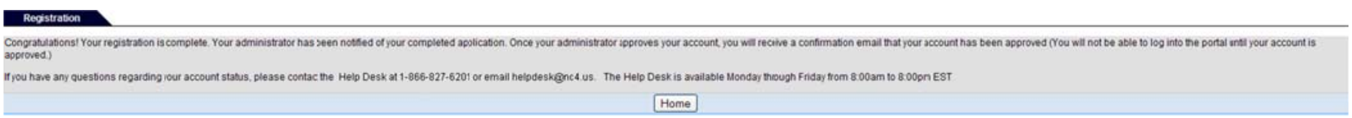


Figure 1.6 – Completed Confirmation Message

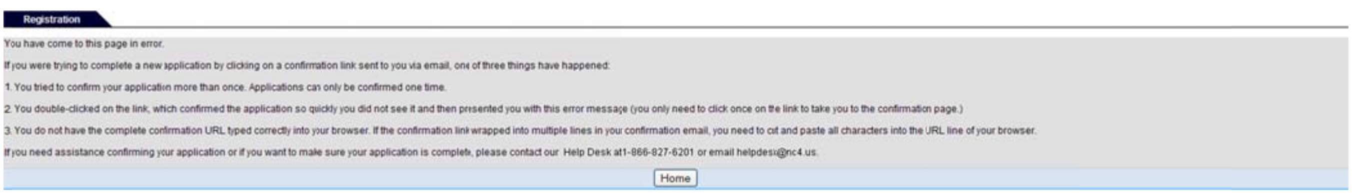


Figure 1.7 – Confirmation Error Message

Logon to Portal

1. Go to the portal's logon screen. The URL is provided in the approval email.
2. Enter the username and password created during registration.
3. Click on the "Log In" button.

4. Depending on the desktop configuration for the particular portal, the desktop will have one of three different looks (see Figures 1.8, 1.9 or 1.10).

Figure 1.8 – Original Desktop

Figure 1.9 – Portlet Desktop

Figure 1.10 – Advanced Navigation (Upgraded Menu) Desktop

Frequently Asked Questions (FAQs)

1. How do I know if I have a browser capable of 128-bit encryption?

   Please refer to the Checking for Encryption section of this manual.

2. How do I see if I have cookies enabled in my browser?

   Please refer to the Enabling Cookies section of this manual.

3. How do I register to become a NEW member of the Management Portal System?

   Go to the URL listed in this manual and click on the "If invited to join, click "Here" to register!" link. Complete the four step registration process by following the on-screen directions. For detailed procedures, refer to Registration.

4. How can I view the portal in Spanish or Portuguese?

   Click the language you would prefer on the top left hand side of the logon page. Refer to tip box under Step 1: Click link to Register.

5. Are there any special requirements for creating a username and password to access the system?

   For all portal members, usernames may be any combination of letters, numbers and/or special characters and at least 3 characters long. Your password must be between 8 and 15 characters, containing at least one uppercase letter, one lowercase letter and one special character. Refer to sections Step 2: Create Username and Step 3: Create Password/Select Security Questions for details.

6. What is my Organization ID?

   Your Organization ID is a numeric code assigned to your facility. Contact your Organizational Administrator or the Support Center for your ID. You must have the correct Organization ID on your registration application for approval.

7. How will I know when my application has been approved?

   You must complete two steps before your account will be approved. First, you must complete an on-line registration application. Once completed, you will receive an email verification of your request for access. You must click on the link in the email. Please refer to Step 5: Confirmation for additional information.

8. How do I log into the system?

   AFTER you have completed the registration process and received a notification of approval, go to the URL of the site and enter the username and password you created in the registration process to access the system.

9. What happens if I do not fill out the entire application? Can I go back later and finish where I left off?

   If you start an application and do not complete it, you cannot go back and retrieve it. Once an application is started, the username in the application is reserved and cannot be re-used by any other applicant. You can, therefore re-register using another username, but not the username selected in the first application attempt.

10. When I try to log into the system, I receive a message that says, "Unauthorized Access."

    You have either typed your username and/or password incorrectly or have not been approved to the site. Remember that usernames and passwords are case AND space sensitive. Try your username/password again and if you are still unsuccessful, please contact your Organizational Administrator or the Support Center to have your password reset. If you try your username/password combination incorrectly more than five times, your account will be automatically locked. When your account is locked, you will not be able to access the system even if you use the correct username/password combination.

11. What happens if I forget my password and/or username and how do I have my account unlocked?

Please contact the Support Center to have password reset and/or your account unlocked.

Section 3 – Alerts

The core tool, Alerts is very similar to the core tool, Secure Messaging. Depending on the assigned user right, users can view, compose, send, search, archive and delete alerts. Within this tool, there are four user level rights:

- System and Community Administrator
- Regular User
- Posting
- Alert Admin

System and Community Administrators can compose, send, manage alerts and view response reports. Regular users can view, search, archive and delete alerts that they have received. The Posting user has the same rights as the regular user and can compose alerts as well as view drafts and send alerts from the alert list(s) within their compartment. The Alert Admin user has the same rights as the Posting user and can manage alert lists. The Alert Admin user can delete the alert list at which time that user loses that access right. Another feature available to any user is the “Alert Options,” which allows users to forward alerts to another device (e.g., external email or cellular phone).

To access Alerts, select the “Alerts” link from the Home page, under the Collaboration Tools menu. Alert features are displayed in the navigation bar based on the user right.

Viewing and Deleting Alerts

All users can view and delete alerts that they have received (see Figure 1.0). Received alerts are listed in the “Alerts” folder by addressee, date sent, priority level, subject title, and the options to “Archive” or “Delete.”

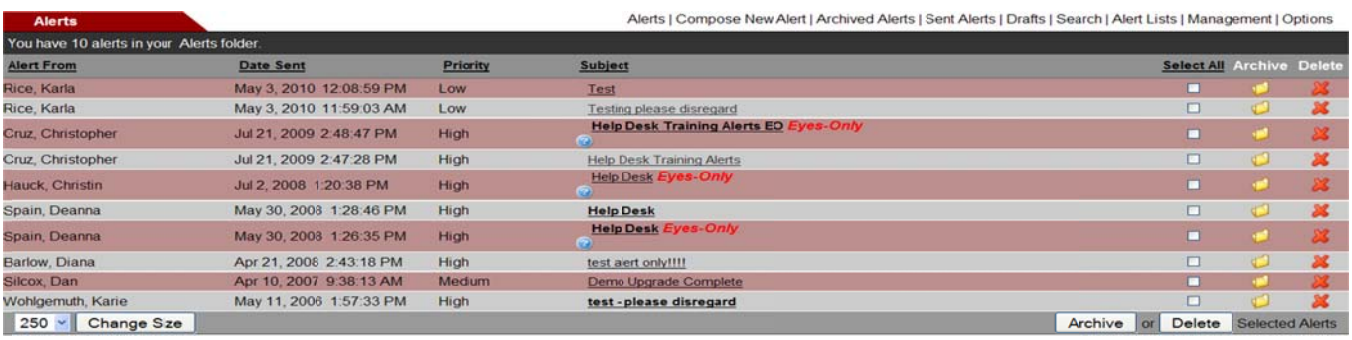


Figure 1.0 – Alerts Main

View Alert

To view an alert within the “Alerts” folder, click on the subject title.

As shown in Figure 1.1, the alert message and any attachments associated with the message are displayed. To view multiple alerts, select the “Next Alert” or “Previous Alert” links from the navigation tab. To return to the alerts folder, select the “List Alert” link.

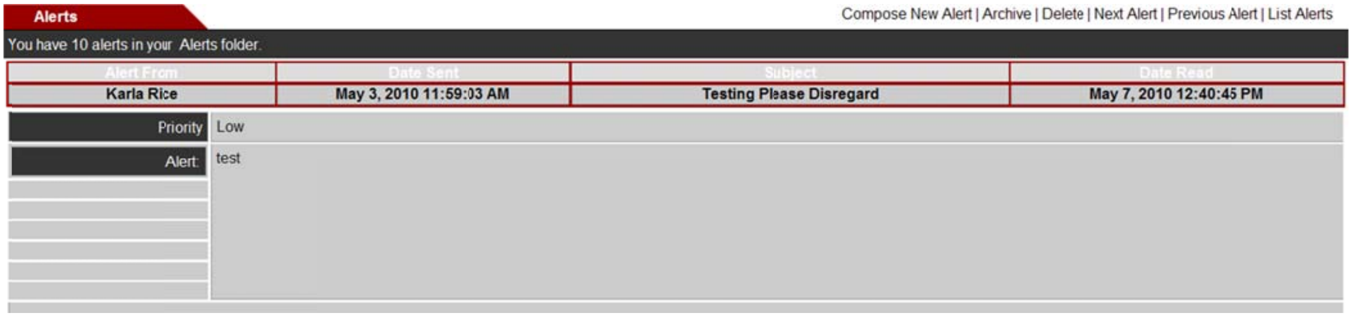


Figure 1.1 - View Alert

Delete Alert

To delete an alert within the “Alerts” folder, select the appropriate check box and click on the “Delete” button. The confirmation screen is displayed. Once the “Delete” button is selected, the alert cannot be retrieved. Click on the “Do Not Delete” button to retain the alert in the “Alerts” folder for further action.

Compose Alerts

Users with System Administrator, Community Administrator, Posting, and/or Alert Admin rights can compose a new alert. Click on the “Compose New Alert” link from the “Alerts” folder. A data screen displays address, subject and attachment fields; an alert priority level option; message area and “Send” and “Save Draft” options (see Figure 1.2). To complete the data screen, perform the following steps:

1. Select the “Orgs”, “Users” and/or “Alert Lists” check boxes under the address book.
2. Click on the “Refresh List” button and the address book is automatically updated with recipients.
3. Type in the name of a user, alert list, or organization in the “Search” field to find a recipient, and click on the “Search” button.
4. Highlight the recipient from the address book and click on the “Insert Recipient” button. The “To” field is automatically updated with the selection. To remove a recipient, select the “Remove Recipient” button and the “To” field is updated.
5. Select the “Eyes-Only?” check box to ensure only users within the address will see the alert. This option also disables the ability to send an alert unencrypted to the recipient’s external email address and attachments.
6. Type the subject name in the “Subject” field.
7. Select any attachments by using the “Browse” button, select the file, and click on the “Attach” button. A new box is displayed with the attached file.

Use the scroll bar to maneuver the list of users. To select multiple user names in a row, hold the shift key and highlight the names, select the appropriate user right, and click on the "Insert Recipient" button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names, and select the "Insert Recipient" button.

Once organizations or alert lists are selected, the portal users within the organization or lists will receive the alert.

8. For the "Alert" section of the data screen, determine if the alert needs to be sent to all recipients. If so, select the "All Hands Alert" check box.
9. Use the drop down arrow to select the alert priority level.
10. Complete the message area and select the appropriate send option radio box.
11. Click on the "Send" button to send your alert or click on the "Save Draft" button to save the alert as a draft and send it later.

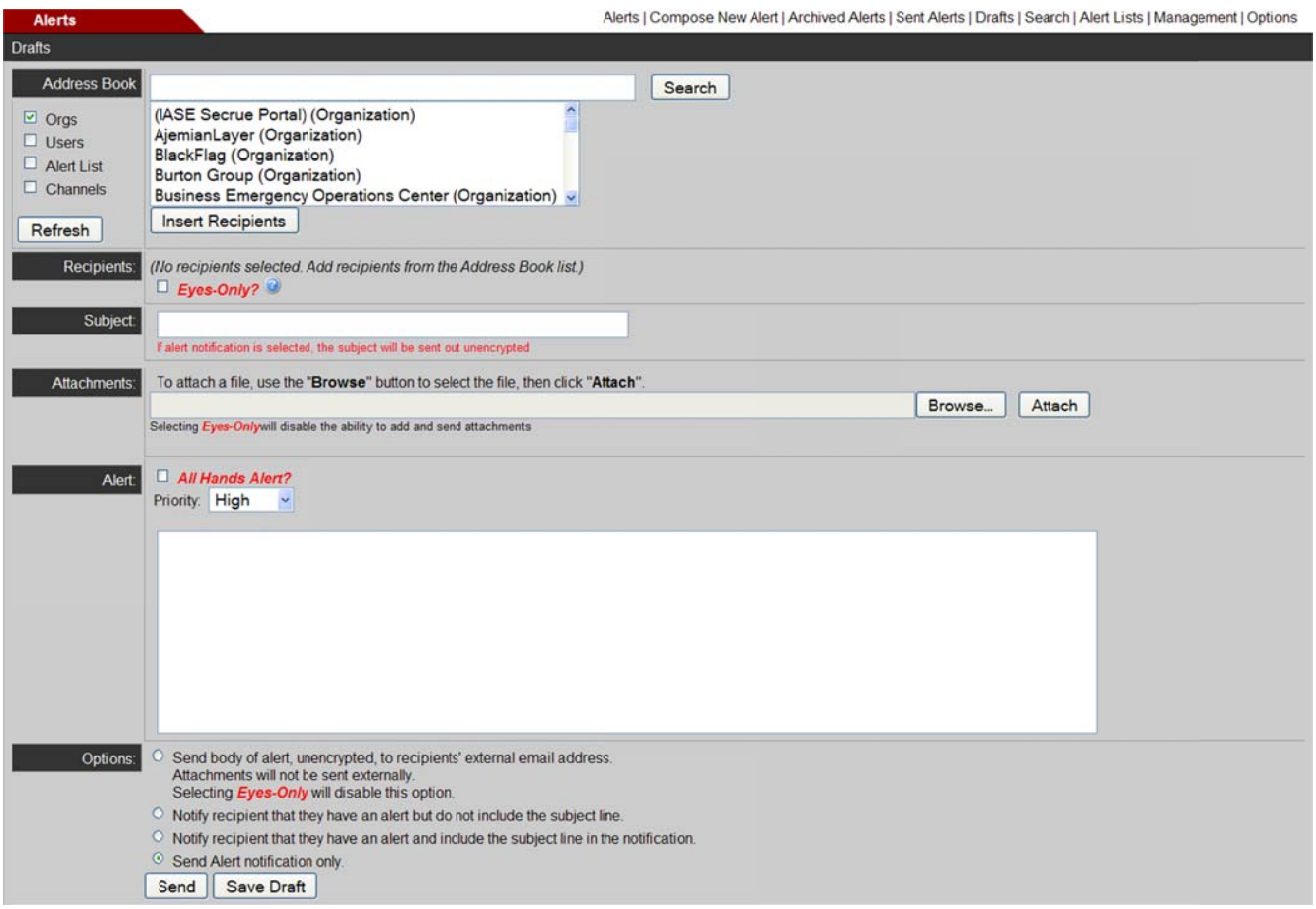


Figure 1.2 – Compose Alert

Archive Alerts

View Archived Alerts

1. To view archived alerts, click on the "Archived Alerts" link from the navigation bar.
2. The "Archived Folder" is similar to the "Alerts Folder" with the addressee, date, priority level, alert title, and an option to delete the alert (see Figure 1.3). To view the details, click on the subject title and the archived alert is displayed.

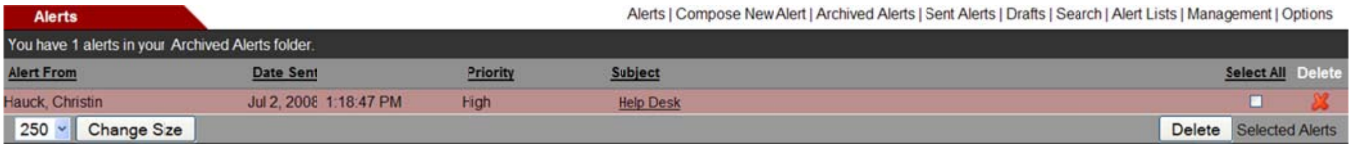


Figure 1.3 – Archived Alerts Folder

Archive Alerts

1. Select the appropriate check box and click on the "Archive" button or click on the icon. The alert is sent to the "Archive" folder.
2. To select multiple alerts for archive, click on the check box next to the alert's subject title and click on the "Archive" button at the bottom.
3. A confirmation screen is displayed (see Figure 1.4). Once the "Archive" button is selected, the alert cannot be moved back into the "Alerts" folder. Click on the "Do Not Archive" button to retain the alert within the "Alerts" folder.

Figure 1.4 – Archive Confirmation

Sent Alerts

Users with System Administrator, Community Administrator, Posting and/or Alert Admin rights can view sent alerts.

1. Click on the "Sent Alerts" link from the "Alerts" folder. Sent alerts are identified by addressee, date it was sent, priority level, subject title, and the option to delete (see Figure 1.5).
2. To change the page size and view additional alerts on the screen, click on the "Change Size" drop down list located at the bottom left corner. Highlight the size. Click on the "Change Size" button.

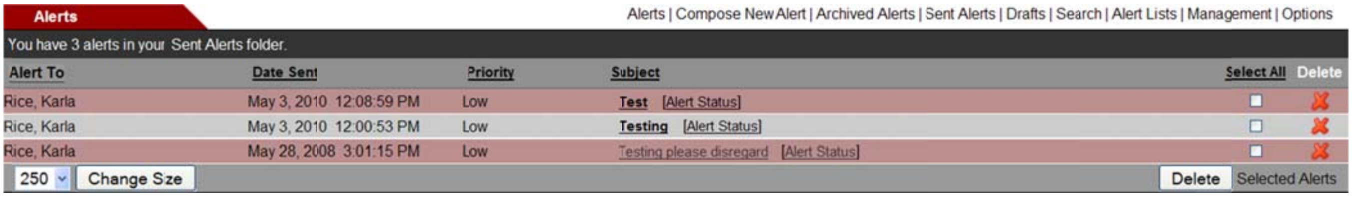


Figure 1.5 - Sent Alerts Folder

3. To view the sent alert, click on the subject title. The person who sent the alert, date sent and read, subject title, priority level, and the alert message are listed (see Figure 1.6).
4. To view multiple alerts, click on the "Next Alert" or "Previous Alert" links from the navigation tab.
5. To return to the "Alerts" folder, select the "List Alerts" link.
6. To delete the alert, click on the "Delete" link. Once deleted, it cannot be retrieved.

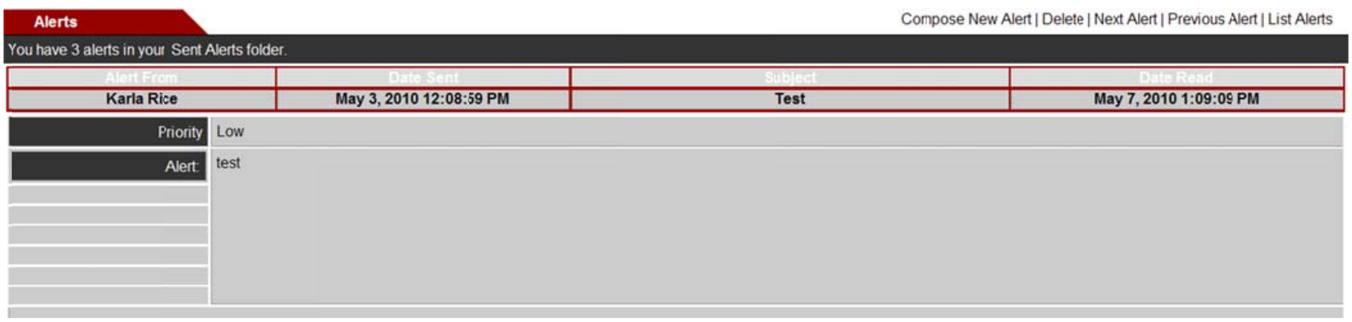


Figure 1.6 - View Sent Alert

7. Sent alerts can also be deleted by selecting the appropriate "Delete" check box (see Figure 1.6).
8. Click on the "Delete" button. If more than one alert is checked, click on the "Delete" button at the bottom and the selected alerts are deleted.
9. A screen is displayed to confirm the delete action (see Figure 1.7).
10. To delete, click on the "Delete" button. To retain the alert, click on the "Do Not Delete" button and the alert is maintained in "Sent Alerts" folder.

Figure 1.7 – Delete Alert Confirmation

Resend Alerts

Users that have sent an alert can resend the alert to the entire user list, partial user list, or to non-responders.

1. Click on the “Sent Alerts” link from the Alerts Folder (see Figure 1.0). The user is taken to the Sent Alerts Folder, where the recipient, date sent, priority, and subject are displayed (see Figure 1.5).
2. Click on the “Alert Status” link.
3. Click on the “Resend to non-responders” button. By choosing to resend to all non-responders, the alert will automatically go out (see Figure 1.8).
4. Click on the “Resend to all recipients” button, allowing the user to modify the recipients list and the message if desired (see Figure 1.8).

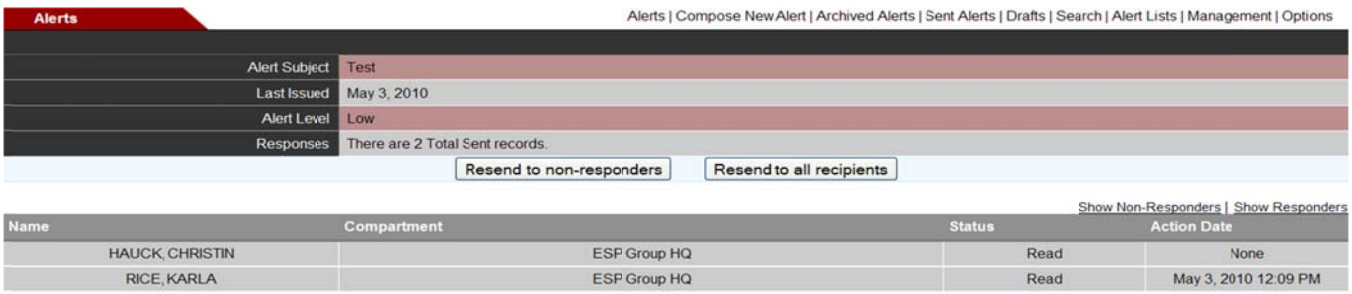


Figure 1.8 - Alert Status

5. The current recipients are displayed in the recipient’s box and the message previously sent is displayed. Follow the instructions detailed above in the “Compose Alerts” section (see Figure 1.2) to add or delete recipients and to modify the message.
6. Click on the “Send” button.

View Responses

Any user that can compose and send an alert may view responses.

1. To view a response record from the “Sent Alerts” folder, click on the “Alert Status” link next to the subject title. The subject title, last date issued, alert priority level, and responses to the alert are listed (see Figure 1.9). In the example, one user has responded to the alert. The response record shows the name of the user, status (i.e., read, archived, deleted), and the date for the action.

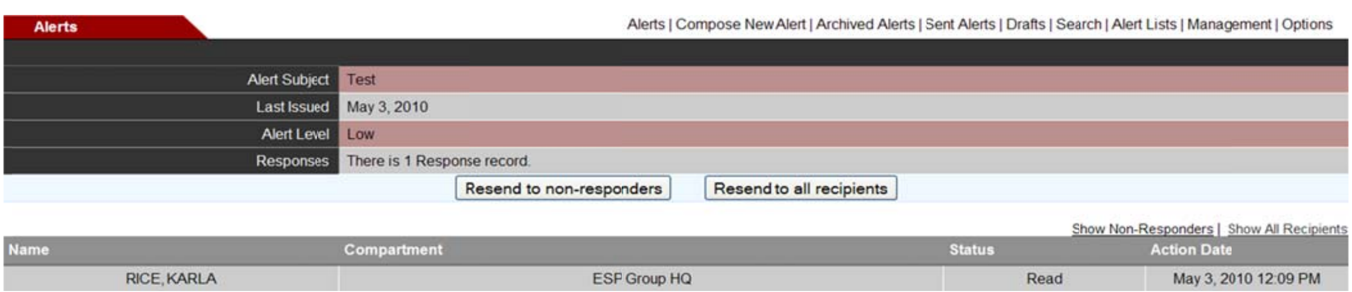


Figure 1.9 – Show Responders

2. To view all recipients who were sent the alert, click on the “Show All Recipients” link under the “Status” field.
3. The total number of response records sent and status are displayed.
4. To close this window and return to the folder, click on the “X” in the right hand corner or use the drop down option under “File” to close the window.
5. To view users who have not responded to the alert, click on the “Show non-responders” link under the “Status” field.
6. To resend the alert, click on the “Resend this alert…” link (see Figure 1.10).
7. A message is displayed confirming the re-send action.
8. To close this window and return to the folder, click on the “X” in the upper right hand corner or use the drop down option under “File” to close the window.

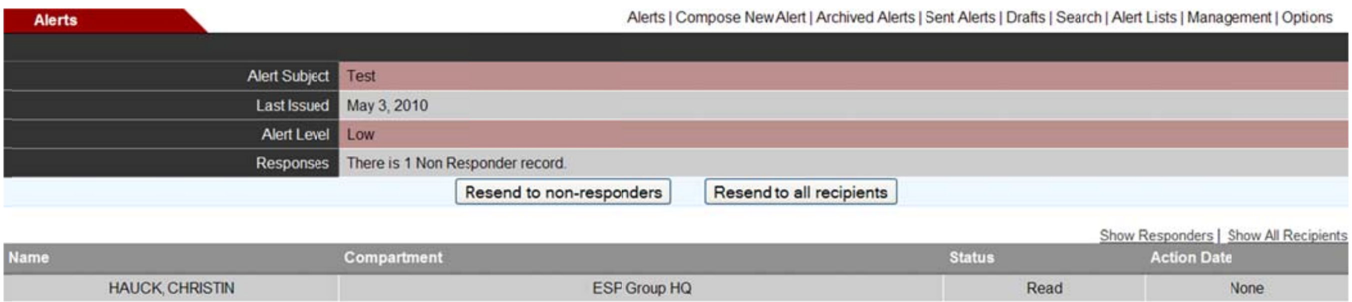


Figure 1.10 - Show Non-Responders

Alert Drafts

Users with System Administrator, Community Administrator, Posting, and/or Alert Admin rights can view draft alerts.

1. From the “Alerts” folder, click the “Drafts” link from the navigation bar.
2. Each draft is listed by addressee, date it was sent, priority level, subject title, and the option to delete (see Figure 1.11).
3. To delete a draft alert, select the appropriate check box “Delete” and click on the “Delete” button. If more than one alert is checked, click on the “Delete” button at the bottom of the screen and the selected alerts are deleted.
4. The confirmation screen is displayed to confirm the delete action. Once an alert is deleted, it cannot be retrieved.
5. Click on the “Delete” button of the confirmation screen or select the “Do Not Delete” button to retain the alert in the “Drafts” folder.

To change the size of the page length, select the size using the down arrow located on the bottom left corner and click on the "Change Size" button. To view a draft, click on the subject title and the "Compose Alert" screen is displayed.

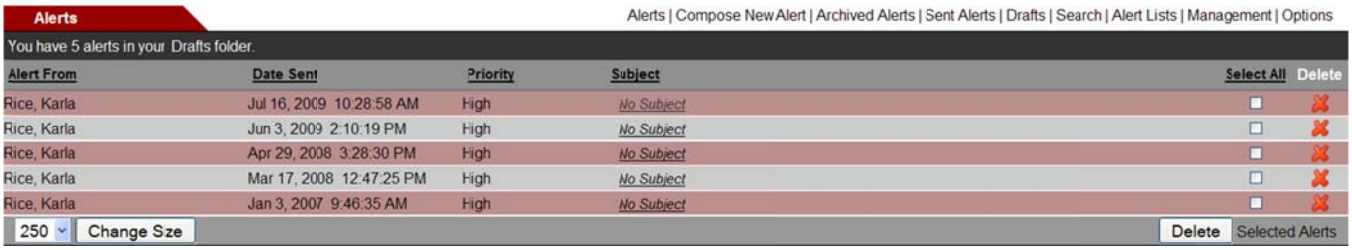


Figure 1.11 - Drafts Folder

Search Alerts

All users may search for alerts within their "Alerts" folder.

1. Click on the "Search" link from the navigation bar.
2. The search screen is displayed, which allows users to search for alerts they have received, archived, or sent (see Figure 1.12).
3. Complete any of the fields listed below.
4. Click on the "Search" button.
5. Use the drop down arrow in the "From" field and highlight the user name.
6. Enter the subject name or type in keywords in the "Content By Keyword" field.
7. Use the drop down arrow to select a status, which is, received, archived, or sent.

Figure 1.12 – Alert Search Folder

8. The "Alert Search" folder is displayed with the search results.
9. To view the alert, select the subject name.
10. To delete or archive the alert, click on the check box and select the appropriate button at the bottom.
11. To select multiple alerts for archiving or deletion, click on the check boxes next to the alert titles and select the appropriate button at the bottom.

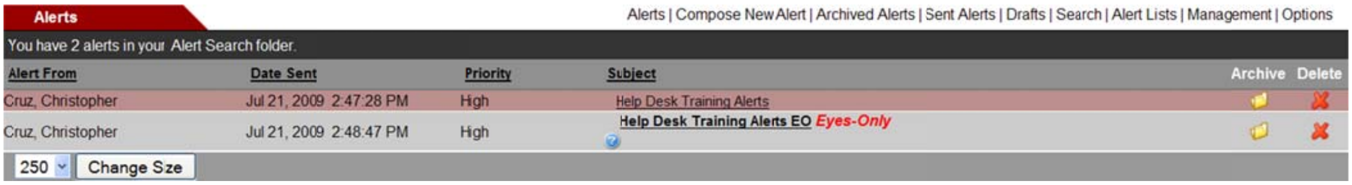


Figure 1.13 - Alert Search Result

Alert Lists

Create Alert Lists

Users with System and Community Administrator, Posting, and/or Alert Admin rights can create alert lists for a particular organization, alert group, or users to send alerts. To create an alert list, perform the following steps:

1. Click on the “Alert Lists” link.
2. Click on the “Create New Alert List” link (see Figure 1.14).

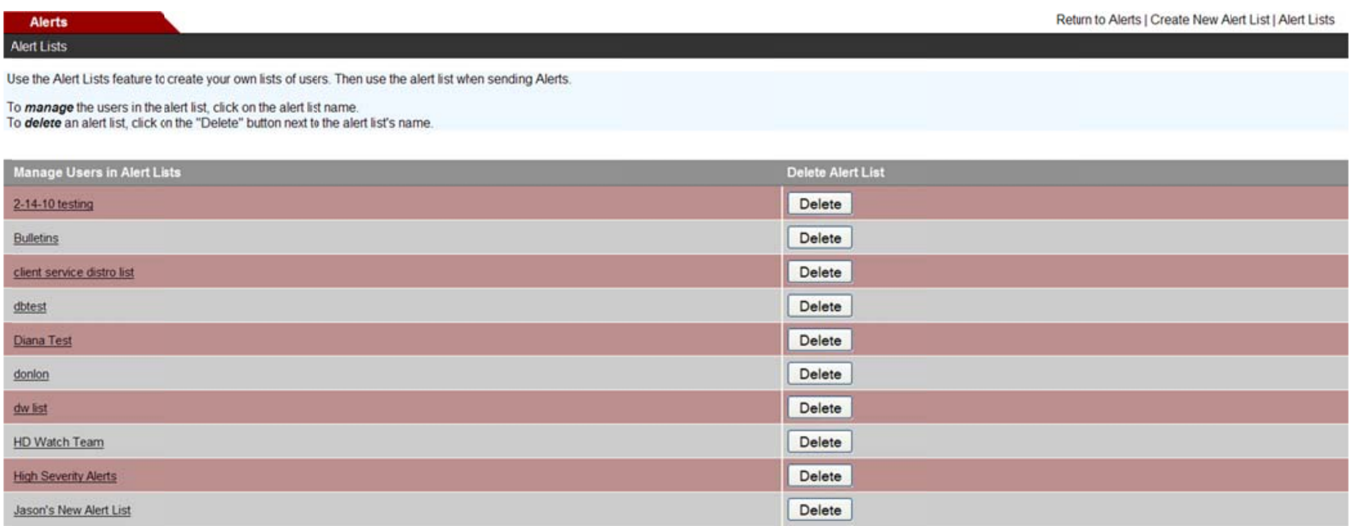


Figure 1.14 - Alert Lists

As shown in Figure 1.14, to manage the users in a current alert list, click on the alert name and a screen prompts for additional data. To delete a list, click on the “Delete” button.

In Figure 1.15, enter the name of the alert list and click on the “Create” button. To cancel and return to the “Alerts” folder, click on the “Cancel” button.

Figure 1.15 - Create Alert List

Manage Alert List Access

Once the alert list is created, a screen is displayed for selecting users. To change the alert title, type in the new name in the "Alert List Name" field and click the "Update Alert List" button at the bottom of the data screen.

To select the users for the alert lists, perform the following steps:

1. Click on the "Orgs" and/or "Users" check box and select the "Refresh" button. The "Users Not in the Alert List" field is updated.
2. Select the users that will receive the alerts by clicking on the name.
3. Click on the appropriate radio box to select the user right (i.e., Alert View Only Access, Alert Admin Access, or Alert Posting Right).
4. Click on the > button to move the user into the "Users in the Alert List" field. To remove a user, click on the < button and the user is returned to the "Users Not in the Alert List" field.
5. Click on the "Finished" button and the alert list is updated.

Only members who share common compartments may be added to the user's list. Each user must be able to collaborate with the other members selected or an error message is received and the action is blocked.

There was a compartment constraint violation when trying to update your access list.

To select multiple user names in a row, hold the shift key and highlight the names, select the appropriate user right, and click on the ">" button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names, select the appropriate user right, and click on the ">" button. The user names are moved to the "Users in the Alert List" field.

6. To search by user name or organization, sponsoring organization, association, city and state use the drop down arrows to select the information or type in the appropriate data.
7. Click on the "Search" button and the "Users Not In Alert List" field is updated with the search results.
8. To delete the list, click on the "Delete Alert List" button. The "Cancel" button returns to the previous screen.

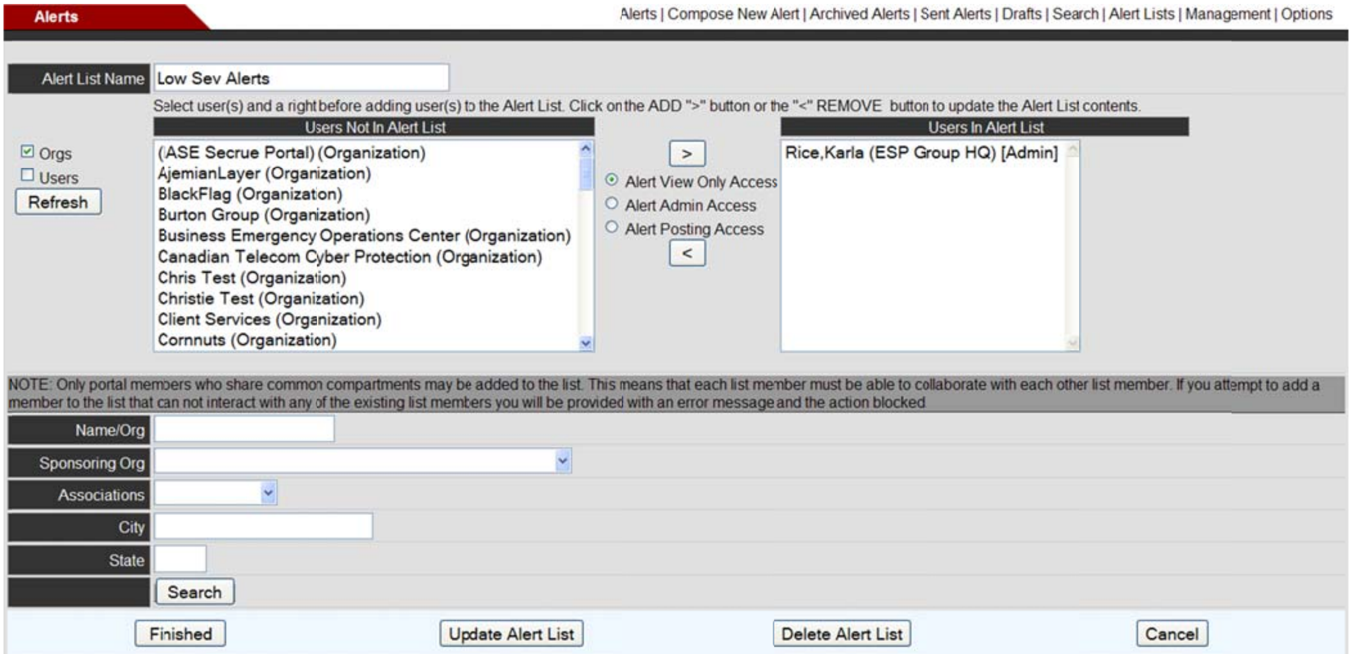


Figure 1.16 – Manage Alert List Access

Click on the alert list title to manage users for an alert list (see Figure 1.16). To update the user list perform the same steps as previously described in **Error! Reference source not found.** and click on the “Update Alert List” button.

Alert Management

Users with System Administrator rights can manage alerts by assigning and arranging priority levels and adding new alert levels (see Figure 1.17). To manage alerts, perform the following steps:

1. Click on the “Management” link from the “Alerts” folder.
2. Type in the name at the bottom of the screen to add a new alert level (e.g., Medium-High), decide the appropriate position by selecting the “At Top” or “At Bottom” radio box, and click on the “Add New Level” button.
3. Select the appropriate “Up One” or “Down One” radio box to rearrange the position of the alert level, and then click on the “Update” button.
4. Select the drop down box arrow at the bottom of the screen to view the current list and order.
5. Select the “Delete” radio box to delete a particular alert level.
6. Select the “Clear Selections” button to clear any changes.
7. Click on the “Back to Alerts” button to return to the “Alerts” folder.
8. Select the “Update” button to update the changes.

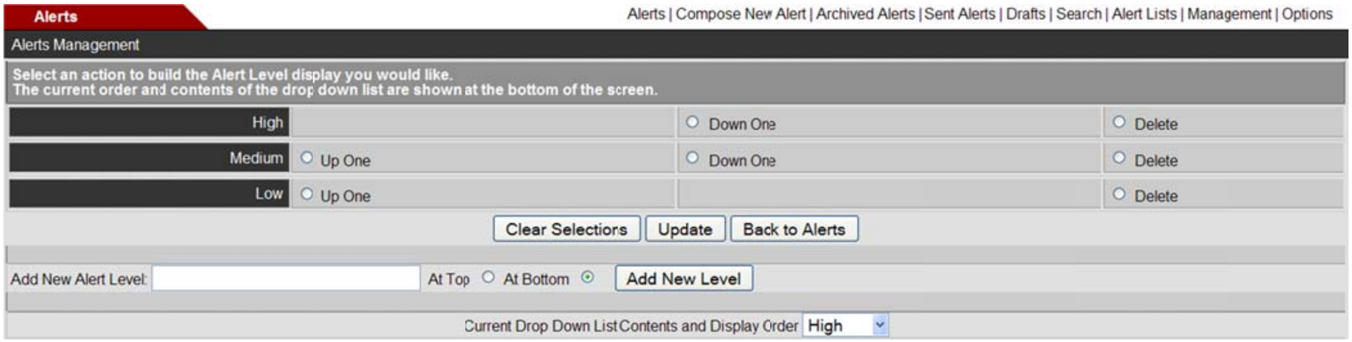


Figure 1.17 - Alerts Management

Alert Options

The “Options” key from the navigation bar allows any user to specify devices for receiving alert notifications externally for different alert levels.

1. Click on the “Options” link from the navigation bar of the “Alerts” folder.
2. To add, delete, or edit a device, click on the “Add/Manage Devices” button at the bottom of the screen (see Figure 1.18).
3. To select an alert level for a device already listed, click on the appropriate check box for the desired alert level.
4. Click on the “Finished” button.
5. To edit a device, select the device name.

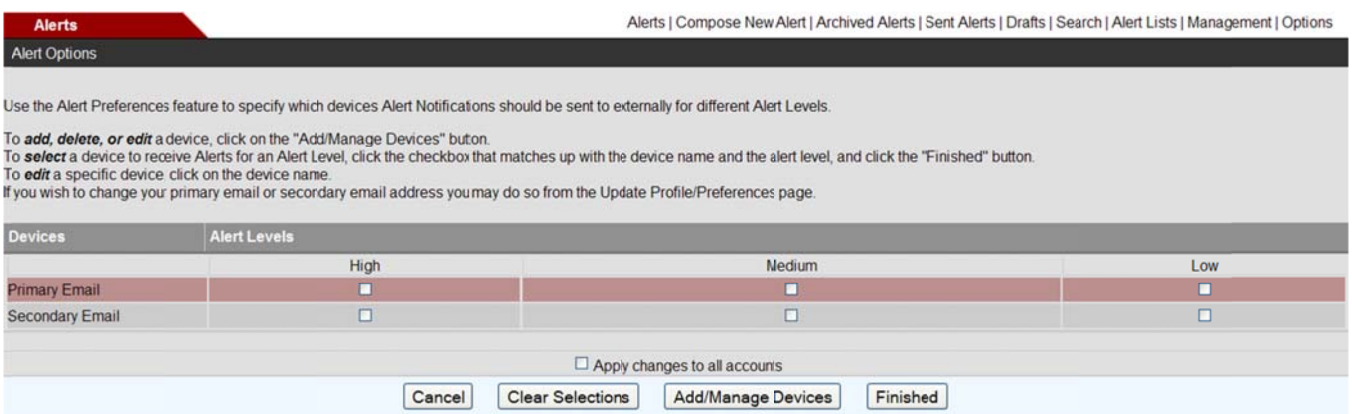


Figure 1.18 - Alert Options

6. Type in the device name and email address. Both fields are required.
7. Enter the information and click the “Add Device” button. The device has been activated to receive alerts (see Figure 1.19).

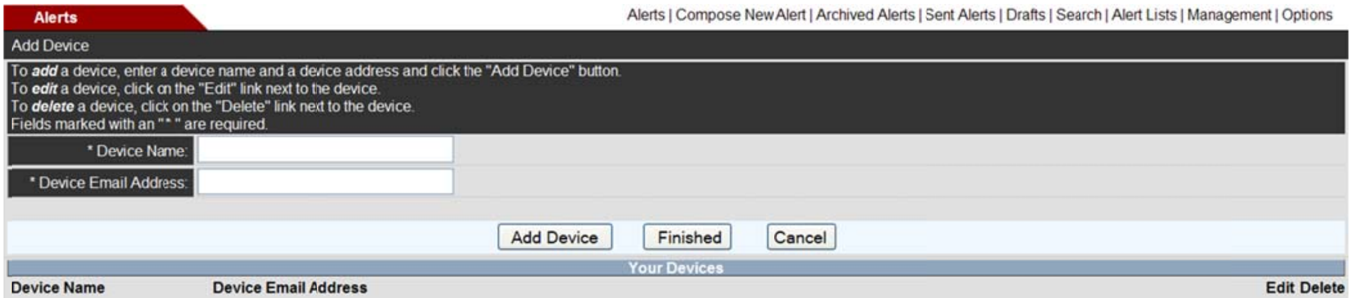


Figure 1.19 - Add Device

Frequently Asked Questions (FAQs)

1. What is the purpose of creating an alert list and how do I create one?

   The alert list feature allows you to create alert lists for selecting organizations, groups, and users to receive your alerts. You must have System and Community Administrator, Posting, and/or Alert Admin user rights in order to create alert lists. Refer to section Create Alert Lists for instructions.

2. If I have System Administrator user rights, how do I create priority levels for alerts?

   Please refer to the Alert Management section for instructions.

3. What steps do I take to compose a new alert?

   You must have System or Community Administrator, Posting, and/or Alert Admin rights to compose a new alert. Click on the “Compose New Alert” link from the navigation bar (refer to section Compose Alerts).

4. How do I verify that my alert was sent?

   Click on the “Sent Alerts” link from the “Alerts” folder navigation bar. You must have System or Community Administrator, Posting, and/or Alert Admin rights. Refer to Sent Alerts section for instructions.

5. How do I add users to an alert that I have sent?

   Click on the “Sent Alert” link. Select the subject title to view the sent alert. Highlight the alert message and copy into a new alert by clicking on the “Compose a New Alert” link. Paste the text into the message area. Select the users you want to receive the alert (see Compose Alerts section for details).

6. When I am in my “Alerts” folder, how do I view an alert?

   You can click on the name of the alert within the subject area. For additional information, please refer to View and Delete Alerts section of this chapter.

7. If I delete an alert, can I retrieve it later?

8. Once you confirm your deletion, you cannot retrieve the alert for later use. It is permanently removed. Refer to View and Delete Alerts section of this chapter.

9. What do I do if I want to archive an alert in my “Alerts” folder?

   You can select the check box next to the subject title and click on the “Archive” link. Once the alert is moved to your “Archive” folder, it returns to your “Alerts” folder. Refer to Archive Alerts section.

10. If I select the “Search” link, will it search for all alerts or just alerts within my “Alert” folder?

    When you click on the “Search” link and you have selected or typed the search criteria (e.g., From), then all alerts listed within all folders are displayed. Refer to section Search Alerts.

11. Can I set up my cell phone to notify me when I receive an alert?

    Yes. Please refer to Alert Options for detailed steps in setting a device for notification.

12. How can I view the status of an alert that I sent?

13. If you have System or Community Administrator, Posting or Alert Admin rights, you can view responses of your alert and resend the alert. Refer to section Response Records.

Section 4 - Calendar

The Calendar is designed for users to post and share calendar events with other portal users. Within the tool, there is a default calendar, titled “Portal Calendar.” It is available for users to post and view events for the Portal. The person who creates the event becomes the administrator and grants users access to see the event(s). All events are listed on the actual date(s) of occurrence.

Private calendars can be created by individual users. The person who creates a private calendar becomes the administrator of the calendar and grants users access and rights (i.e., view, post, edit, delete, and manage). To access Calendar, select the “Calendar” link from the Home page or from the navigation bar.

View Calendar Layouts

As shown in Figure 1.0, there are several options for calendar view. The default is one month.

View One Month

1. Use the single arrows to advance next or move back one month at a time. The double arrows are used to advance or move back a year.
2. Click on the “View One Month” link for this layout.
3. On the left-hand side of the screen, the legend and small monthly calendars are displayed to include previous month, current month, and the next month. To collapse this first column, select the column separator and first column will be hidden. Select separator again to display the column.

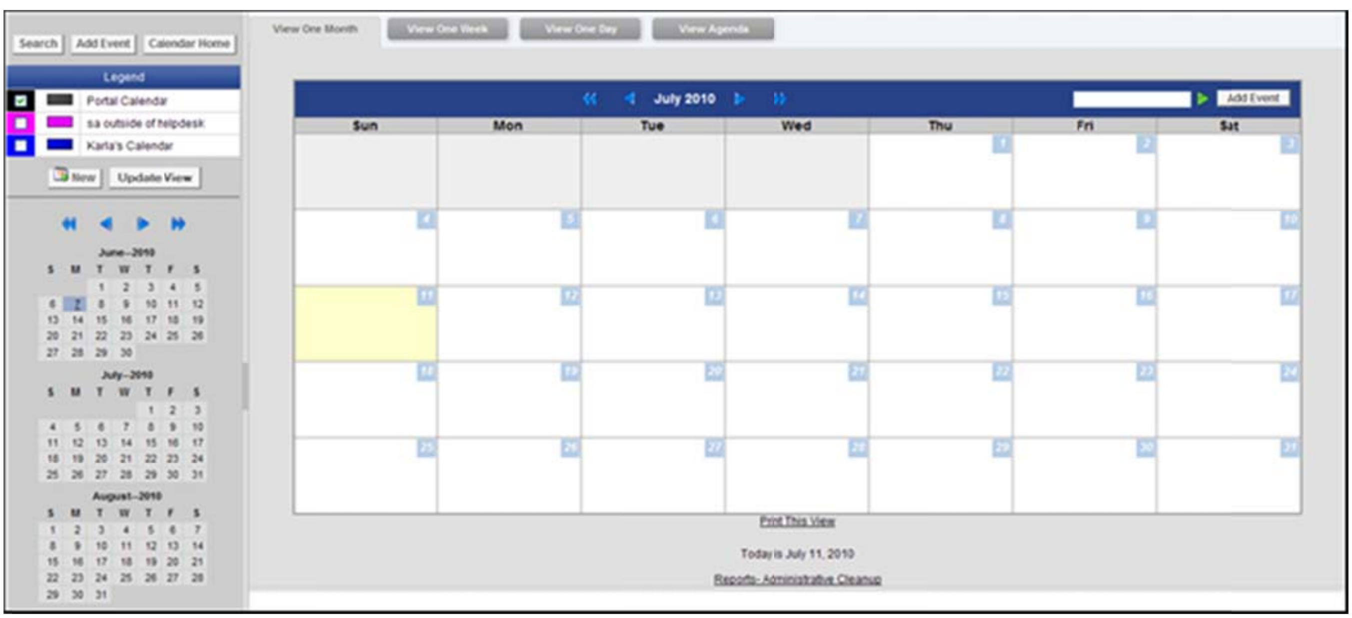


Figure 1.0 - One Month Layout

View One Week

1. To view one week, click on the “View One Week” link at the bottom of the screen.
2. Use the single arrows to move ahead or back a week.
3. The double arrows are used to move ahead or back a month.
4. To save this layout, click on the “Update View” button under the calendar “Legend.”

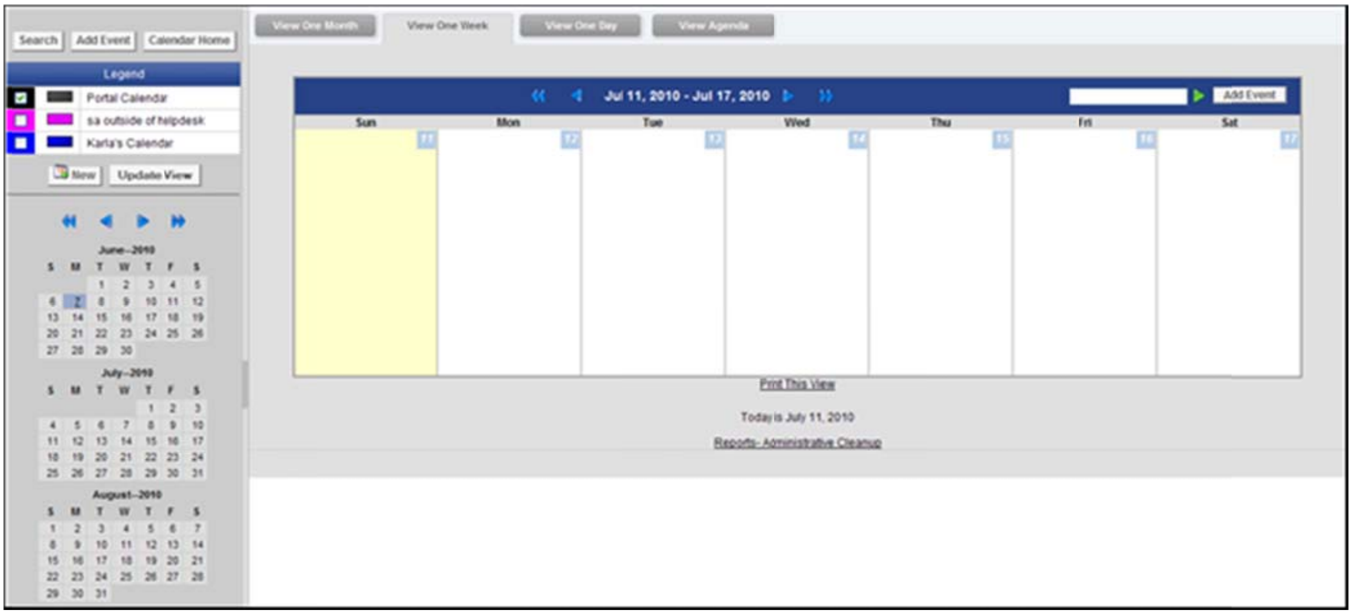


Figure 1.1 - One Week Layout

View One Day

1. To view one day is to click on the “View One Day” link at the bottom of the screen.
2. The events for that day are listed by time, event name, and calendar.
3. To save this layout, click on the “Update View” button under the calendar “Legend.”

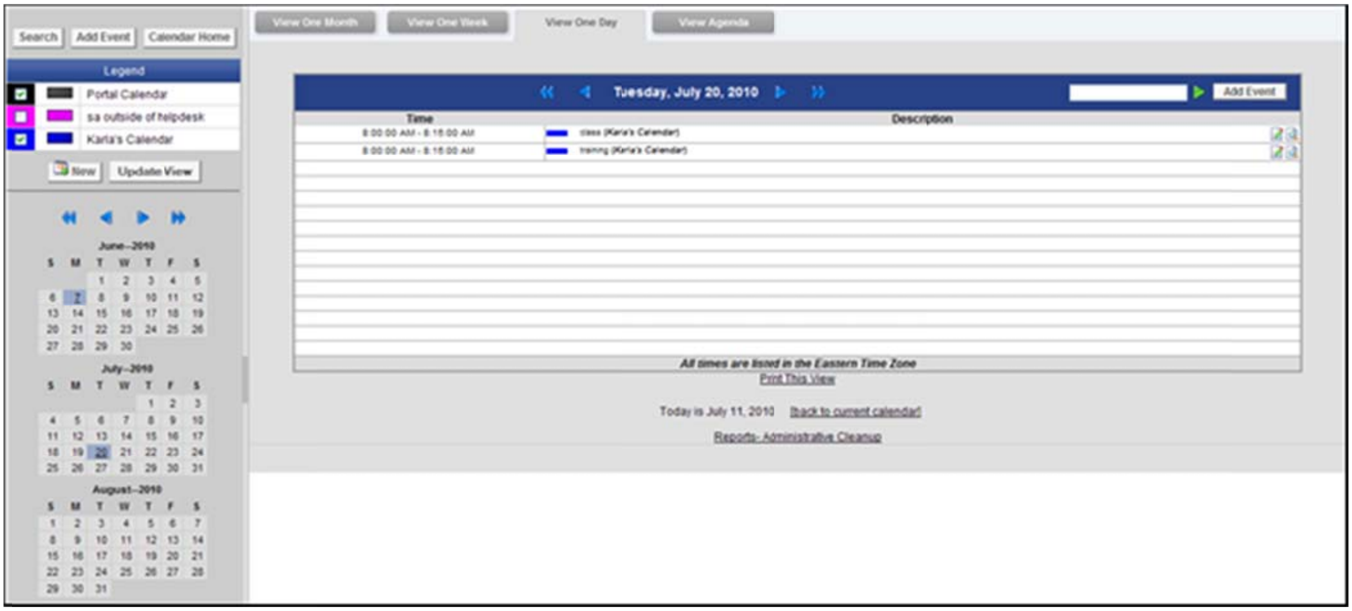


Figure 1.2 - One Day Layout

View Calendar Events

Once events are posted to a calendar, the events can be viewed within the three calendar layouts. Events are highlighted and underlined as links. If more than three events are posted for one day, click on the “More” link to see the listing (see Figure 1.0).

As shown in Figure 1.3, the event is displayed by title, calendar, duration, category type, sponsor information, event description, attachments, and event administrator. To view the other users who can see the event:

1. Click on the “view other users” link and the user names are displayed.
2. To collapse, select the collapse link and the user names are no longer shown.
3. If an event is posted in one of small calendars to the right, the event date is highlighted in blue.
4. To view the listed event, click on the date.
5. To close out the event and return to the previous screen, click on the “Return to Calendar” link.

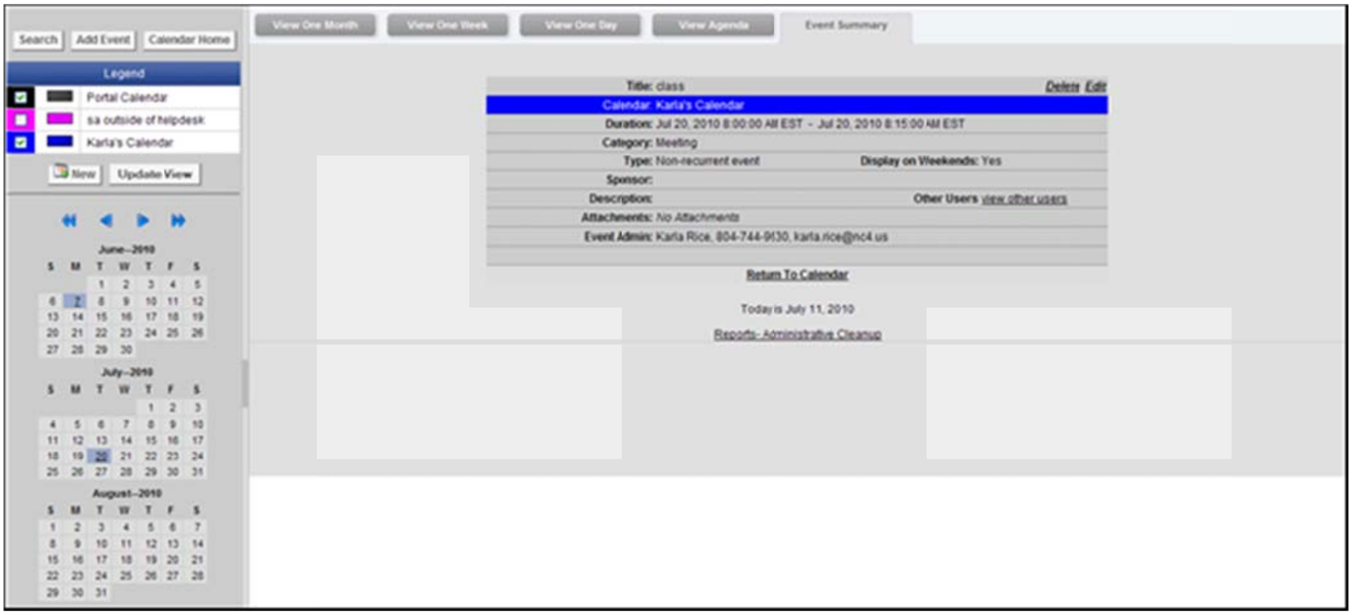


Figure 1.3 - View Event

Search for Events

1. To search for specific events, conduct a keyword search. This type of search explores through every word of every calendar the user can access, excluding calendar attachments.
2. Click on the ‘Search” button at the top left of the screen.
3. Type in the keyword(s) in the provided text box and select the “Search” button (see Figure 1.4).
4. The results are listed by date, time, and event title.
5. Click on the event title to view the event.
6. To conduct a new search, enter the new criteria in the text box and click on the “Search” button.
7. To return to the calendar, click on the “Return To Calendar” button.

Figure 1.4 - Search Event

Change Calendar Colors

Each calendar can be labeled by a designated color. For example, events for the Portal calendar can be labeled in **Black** while events for a private calendar can be labeled in **Red, Green**, etc. Fourteen unique colors can be assigned to multiple calendars all in one screen.

1. Click on the colored square next to a calendar name from the "Calendar" screen. By default, the colored square is black.
2. Use the drop down arrows under each calendar name to select the color from the list (see Figure 1.5).
3. Click the "Save Changes" button to save the color changes, or select "Return to Calendar" to cancel.

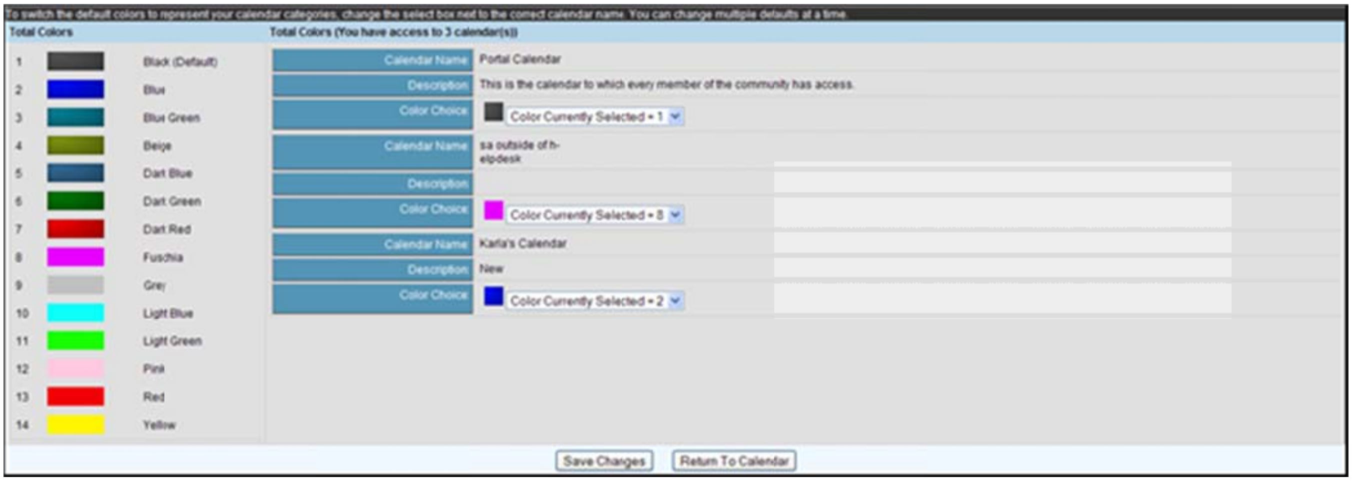


Figure 1.5 - Calendar Colors

Portal Calendar

Any user can post an event to the "Portal Calendar."

Add Event

1. Click the "Add Event" link at the top right of the screen, or click on the calendar date for the event.
2. Type the name of the event in the text box (see Figure 1.6).
3. Click on the "Create" button.
4. Use the drop down arrow to select the calendar for the event.
5. To cancel, click on the "Cancel" button and return to the calendar screen.

Figure 1.6 - Create Event

Event Details

To describe the details of the event, complete the "Add Event" screen by (see Figure 1.7):

1. Use the drop down arrows to enter in the start and end date and time of the event.
2. Type in the title, description of the event, and the sponsoring organization in the provided text boxes.
3. Select the category of the event by using the drop down arrow.
4. Click on the “Yes” or “No” radio box to display the event on weekends.
5. Choose “Recurrent Options” by using the drop down arrow and make the selection. The event can be non-recurrent, that is, occurs one time; or recurrent, which is a repeated event.

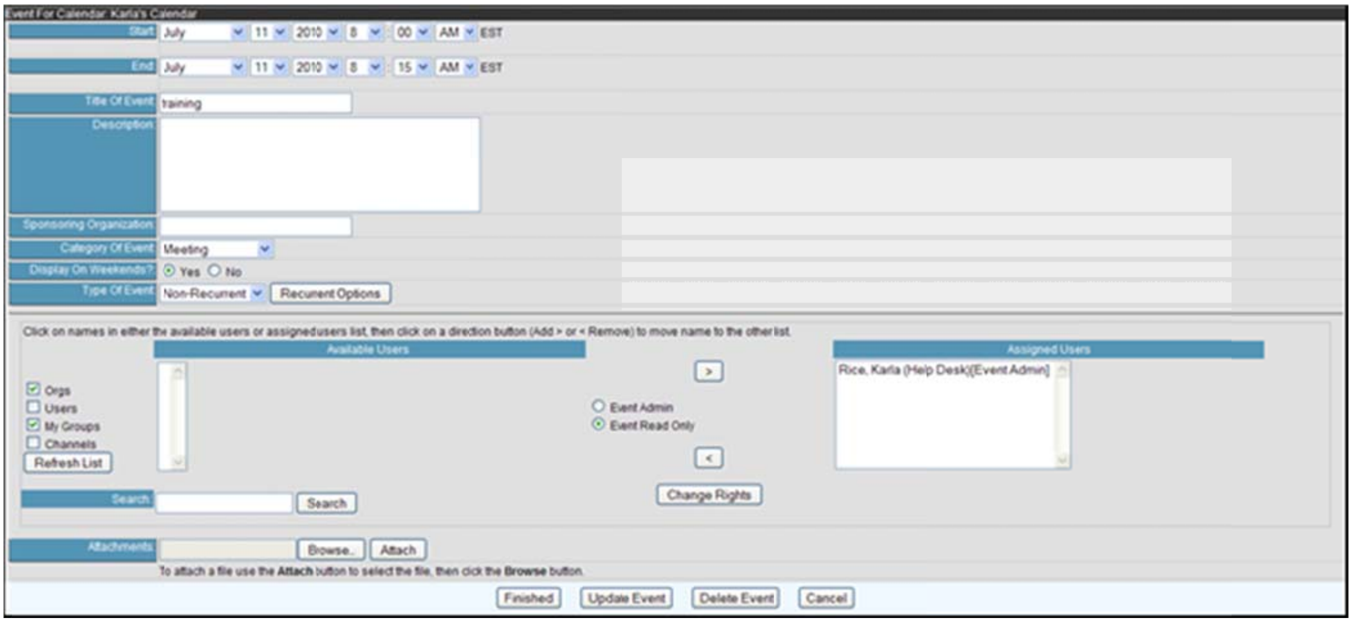


Figure 1.7 - Add Event

Recurrent Event

1. If the event is recurrent, select “Recurrent” from the drop down box (see Figure 1.7).
2. Click on the “Recurrent Options” button.
3. The name of the event is automatically displayed (see Figure 1.8).
4. Using the drop down arrows, select the start and end dates for the event.
5. To change the year, type the correct year.
6. Click on the appropriate radio box for “Event Occurs,” that is daily, weekly, monthly, or yearly.
7. Click on the “Refresh Frequency Details” button to view frequency options. Frequency details change for each option.
8. Daily - Choose the number of days next to “Frequency Details” heading.
9. Weekly - Choose the week of the month (i.e. 1st, 2nd, 3rd, 4th, or last week(s) of the month) and the days of the week (i.e. listed Sunday through Saturday).

10. Monthly - Choose the number of days for every number of months, or select the week of month, day of week, and number of months.
11. Annually - Choose the month and year, or week of the month, day of week, and month of year.
12. Click on the “Finished” button.
13. If the options need to be modified, select the “Recurrent Options” button and make the modifications.
14. Click on the “Update Event” button to save the changes.
15. Click on the “Finished” button to return to the “Add Event” screen.

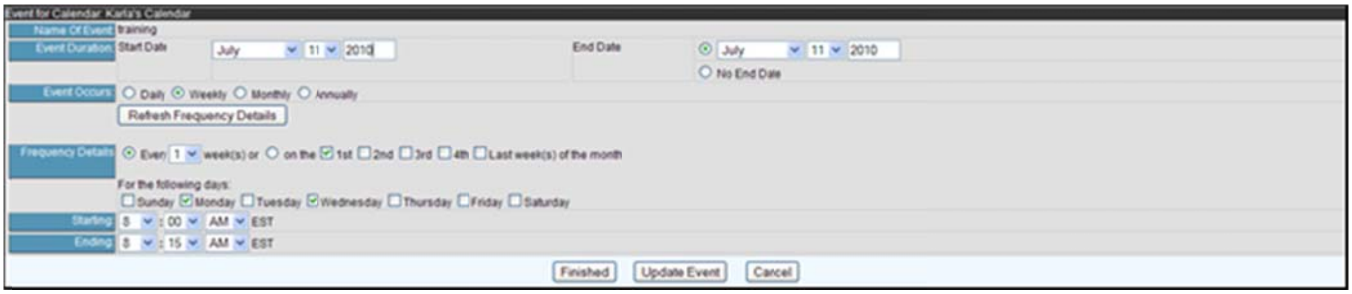


Figure 1.8 - Recurrent Event

Event Access

In order for users to view the event, they must be granted access (see Figure 1.9).

1. Select the “Orgs,” “Users,” and/or “My Groups” check boxes.
2. Click on the “Refresh” button and the available users list is automatically updated with users based on your choice above. Depending on your portal configuration, if you choose the “Users” radio box, you may need to specify search criteria and execute a search before the list will contain matching and available records.
3. Type in the name of a user, group, or organization in the “Search” field. Depending on your portal configuration, the administrator may have set a minimum number of search characters. (The minimum number of search characters does not apply to Site and Community Administrators). You will receive an error message if there is a minimum set and you have entered fewer characters than the set minimum.
4. Click on the “Search” button.
5. Highlight the user name(s) and click on the button to grant users access.
6. Select the button to move a user back to the “Available Users” list.
7. Notice the “Event Read Only Access” radio box is pre-selected to allow users to read the event but not edit, delete, or manage the event. This is the default access right for the “Portal Calendar.”
8. Click on the “Update Event” button and the “Finished” button.

To select multiple user names in a row, hold the shift key and highlight the names and click on the “>” button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names, and click on the “>” button.

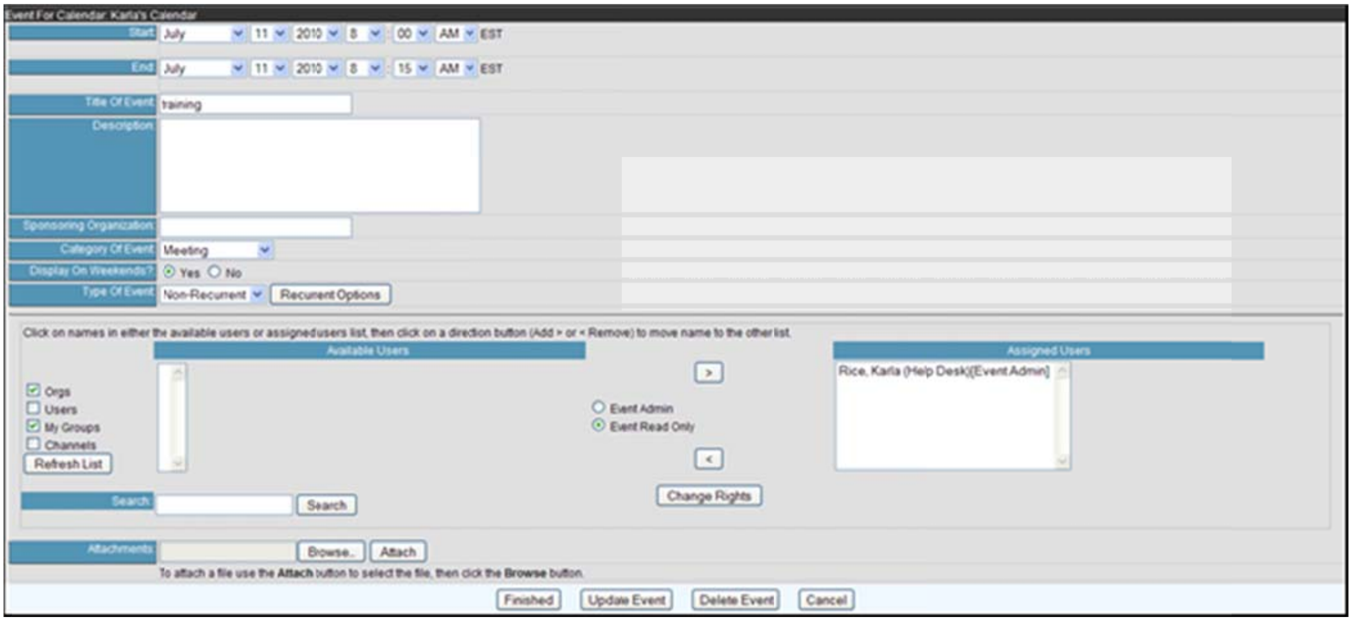


Figure 1.9 – Manage Access

Attachments

1. Click on the “Browse” button.
2. Select the file to be attached.
3. Click on the “Attach” button and the file is now displayed as part of the event. There are no limitations as to the number of files that can be attached, or file type and size.
4. After entering the event information, click on the “Finished” button (see Figure 1.5).
5. Click on the “Update Event” button to save the information and return to the “Add Event” screen. Click on the “Finished” button to update the event and return to the Portal Calendar.

Edit/Delete Event

The event administrator (i.e., person who created the event) has the ability to edit and delete events.

1. Click on the “Edit” link to advance to the “Add Event” screen to make modifications (see Figure 1.3).
2. Click on the “Delete” link to delete the event.
3. A confirmation screen is displayed. To continue with the deletion, click on the “Delete” button. To cancel the deletion and return to the calendar, click on the “Cancel” button. Once an event is deleted, it cannot be retrieved (see Figure 1.10).

Figure 1.10 – Deletion Confirmation Screen

Private Calendar

Users can create private calendars to post individual events and control user access. The person who creates the calendar is automatically assigned “Admin” user rights.

Create Calendar

1. Click on the “Create New Calendar” button on the left side of the “Calendar” screen (see Figure 1.0).
2. Enter the name of the calendar and a description, which is optional (see Figure 1.11).
3. Click on the “Continue” button.

Figure 1.11 - Create New Calendar

Calendar Access

Once the calendar is created, users must be assigned access and rights (see Figure 1.12).

1. Select the “Orgs,” “Users,” and/or “My Groups” check boxes.
2. Click on the “Refresh” button and the available users list is automatically updated with users based on your choice above. Depending on your portal configuration, if you choose the “Users” radio box, you may need to specify search criteria and execute a search before the list will contain matching and available records.
3. Type in the name of a user, group, or organization in the “Search” field. Depending on your portal configuration, the administrator may have set a minimum number of search characters. (The minimum number of search characters does not apply to Site and Community Administrators). You will receive an error message if there is a minimum set and you have entered fewer characters than the set minimum.
4. Click on the “Search” button.
5. Highlight the user name(s). Click on the button to grant users access.
6. Click on the  button to move a user back to the “Available Users” list.
7. Select the appropriate radio box for user rights (i.e., “Admin,” “Read/Post” or “Read Only”).
8. Click on the “Finished” button and return to the calendar screen.

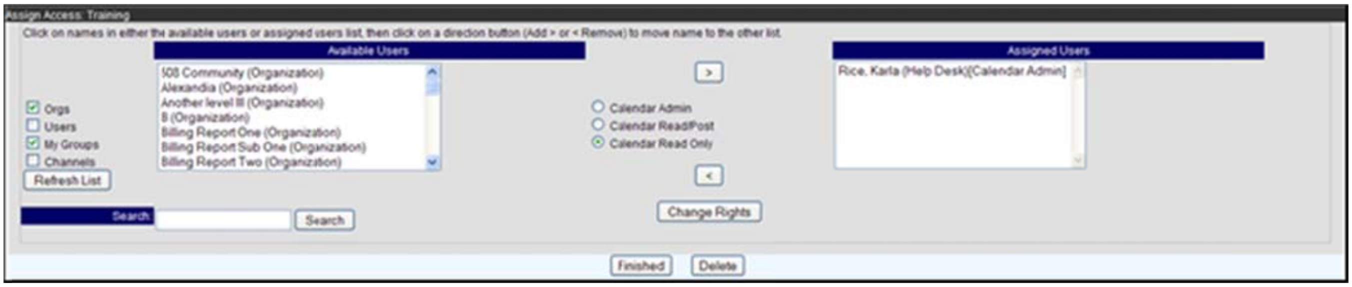


Figure 1.12 - Assign Access

To select multiple user names in a row, hold the shift key and highlight the names and click on the ">" button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names, and click on the ">" button.

User Rights

The three user access rights that can be assigned are:

- "Calendar Admin Access" should be granted sparingly and cannot be given to organizations or groups, only individual users. It allows users to read, post, edit, delete and manage access to the private calendar.
- "Calendar Read/Post Access" enables users to read and post events.
- "Calendar Read Only Access" allows users to only read events that are posted.

After the user rights are selected, click on the "Finished" button. At the "Calendar" screen, the private calendar title is listed under the "Legend" heading.

Delete/Edit Calendar

The calendar administrator (i.e., person who created the event) or person with calendar admin access, has the ability to edit calendar access and/or delete the calendar.

1. Click on the calendar name link to make modifications or delete the calendar (see Figure 1.12).
2. Make modifications and select "finished."
3. Click on the "Delete" link to delete the calendar.
4. A confirmation screen is displayed (see Figure 1.13). To continue with the deletion, click on the "Yes, Delete It" button. To cancel the deletion and return to the calendar, click on the "No go back" button. Once a calendar is deleted, it cannot be retrieved.

Figure 1.13 – Delete Calendar Confirmation

Add Event

Users with “Calendar Admin Access” or “Calendar Read/Post Access” can add events to a private calendar.

1. Click on the “Add Event” link located on the top right of the “Calendar Main” screen.
2. Designate which calendar to add the event (see Figure 1.14).
3. Enter the name of the event.
4. Click the “Create” button.
5. Continue to follow the steps outlined in Portal Calendar.

Figure 1.14 – Add Event to Private Calendar

Event Details

Once the event name and calendar are selected you must fill in the event details. Fill in the details as follows:

1. Use the drop down arrows to enter in the start and end date and time of the event (see Figure 1.15).
2. Type in the title, description of the event, and the sponsoring organization in the provided text boxes.
3. Select the category of the event by using the drop down arrow.
4. Click on the “Yes” or “No” radio box to display the event on weekends.
5. Choose “Recurrent Options” by using the drop down arrow and make the selection. The event can be non-recurrent, that is, occurs one time; or recurrent, which is a repeated event.

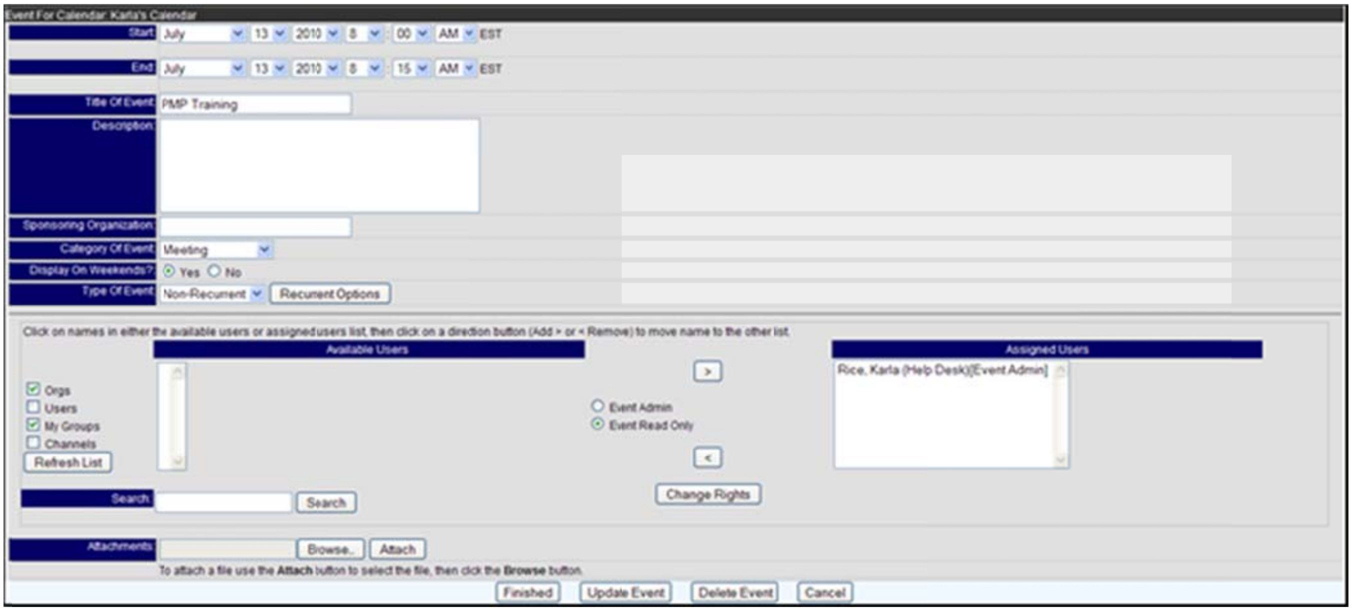


Figure 1.15 – Event Details

Recurrent Event

1. If the event is recurrent, select “Recurrent” from the drop down box (see Figure 1.15).
2. Click on the “Recurrent Options” button.
3. The name of the event is automatically displayed (see Figure 1.16).
4. Using the drop down arrows, select the start and end dates for the event.
5. To change the year, type the correct year.
6. Click on the appropriate radio box for “Event Occurs,” that is daily, weekly, monthly, or yearly.
7. Click on the “Refresh Frequency Details” button to view frequency options. Frequency details change for each option.
   i. Daily - Choose the number of days next to “Frequency Details” heading.
   ii. Weekly - Choose the week of the month (i.e. 1st, 2nd, 3rd, 4th, or last week(s) of the month) and the days of the week (i.e. listed Sunday through Saturday).
   iii. Monthly - Choose the number of days for every number of months, or select the week of month, day of week, and number of months.
   iv. Annually - Choose the month and year, or week of the month, day of week, and month of year.
8. Click on the “Finished” button.
9. If the options need to be modified, select the “Recurrent Options” button and make the modifications.
10. Click on the “Update Event” button to save the changes.
11. Click on the “Finished” button to return to the “Add Event” screen.

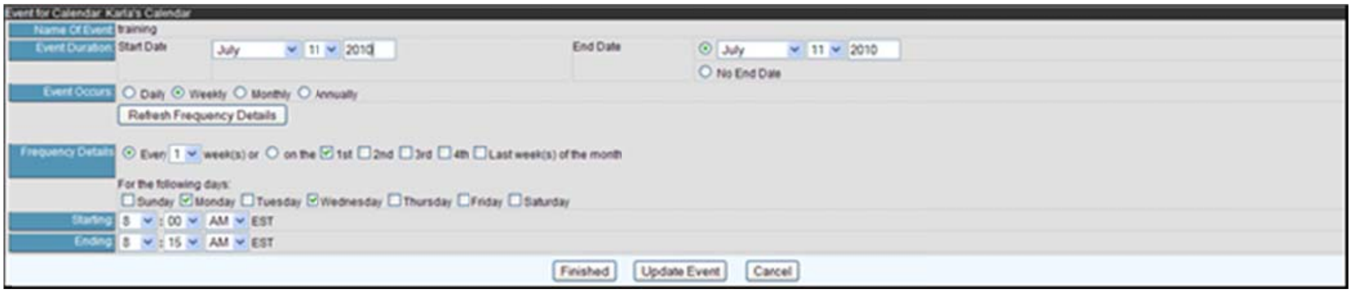


Figure 1.16 - Recurrent Event

Event Access

In order to give users access to the event, they must first be granted access to the Calendar (see Figure 1.17).

1. Select the “Orgs,” “Users,” and/or “My Groups” check boxes.
2. Click on the “Refresh” button and the available users list is automatically updated with users based on your choice above. Depending on your portal configuration, if you choose the “Users” radio box, you may need to specify search criteria and execute a search before the list will contain matching and available records.
3. Type in the name of a user, group, or organization in the “Search” field. Depending on your portal configuration, the administrator may have set a minimum number of search characters. (The minimum number of search characters does not apply to Site and Community Administrators). You will receive an error message if there is a minimum set and you have entered fewer characters than the set minimum.
4. Click on the “Search” button.
5. Highlight the user name(s) and click on the > button to grant users access.
6. Select the < button to move a user back to the “Available Users” list.
7. Notice the “Event Read Only Access” radio box is pre-selected to allow users to read the event but not edit, delete, or manage the event.
8. Click on the “Update Event” button and the “Finished” button.

To select multiple user names in a row, hold the shift key and highlight the names and click on the “>” button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names, and click on the “>” button.

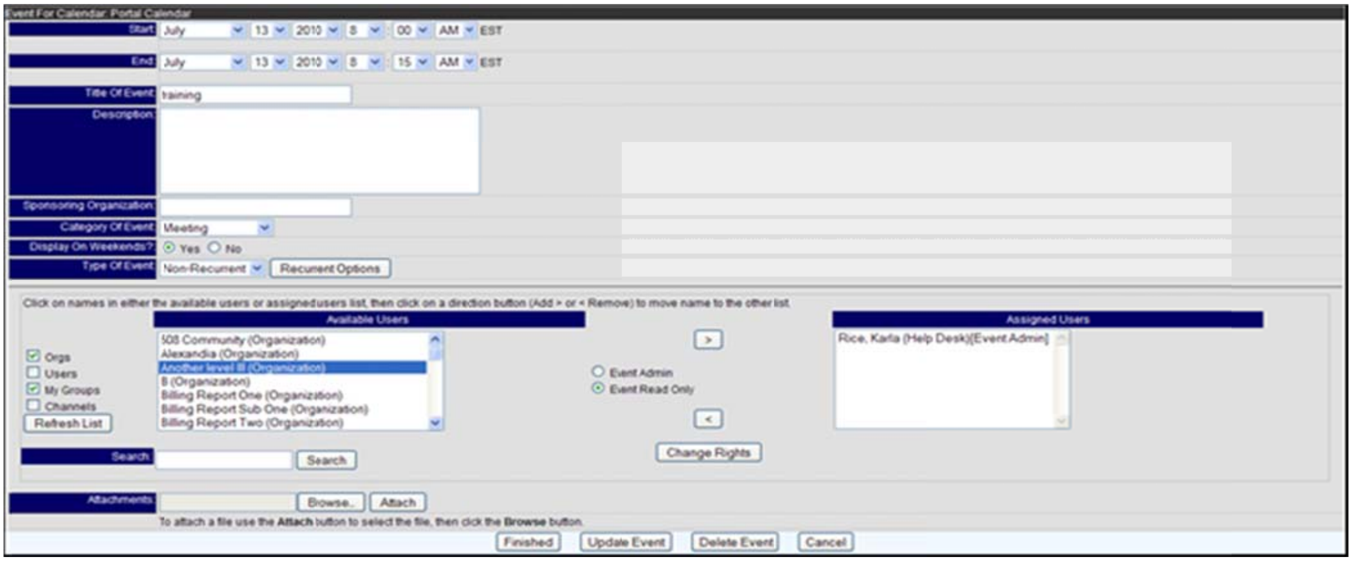


Figure 1.17 – Manage Access

Attachments

1. Click on the “Browse” button.
2. Select the file to be attached.
3. Click on the “Attach” button and the file is now displayed as part of the event. There are no limitations as to the number of files that can be attached, or file type and size.
4. After entering the event information, click on the “Finished” button (see Figure 1.17).
5. Click on the “Update Event” button to save the information and return to the “Add Event” screen. Click on the “Finished” button to update the event and return to the Portal Calendar.

Edit/Delete Event

The event administrator (i.e., person who created the event) has the ability to edit and delete events.

1. Click on the “Edit” link to advance to the “Add Event” screen to make modifications (see Figure 1.3).
2. Click on the “Delete” link to delete the event.
3. A confirmation screen is displayed. To continue with the deletion, click on the “Delete” button. To cancel the deletion and return to the calendar, click on the “Cancel” button. Once an event is deleted, it cannot be retrieved (see Figure 1.18).

Figure 1.18 – Deletion Confirmation Screen

Frequently Asked Questions (FAQs)

1. Instead of viewing my calendar by the month, how can I change the layout?

   At the bottom of your main calendar, there are three view options. Click on the view layout and your calendar is updated (refer to View Calendar Layouts).

2. How do I view events that have been posted to the calendar?

   From your main calendar, select the event name or event date (for the small calendars). The "View Event" screen is displayed (refer to View Calendar Events).

3. I need to find a particular event that was posted last month, what steps do I take?

   You can search for the event or go to that calendar month to view the event. To search for a specific event, click on the 'Search" link from your calendar screen. Enter in key words and click on "Submit Query." The event is listed by date, time and title (refer to Figure 1.4 - Search Event and View Calendar Layouts).

4. How do I add an event to a calendar?

   Any user can add an event to the Portal calendar. Click the "Add Event" link at the top right of the "Calendar" screen (refer to Add Event To Portal Calendar). For private calendars, users with "Calendar Admin Access" rights can post event (refer to Create Private Calendars).

5. If an event is taking place for three months, how do I post it?

   At the "Add Event" screen, select "Recurrent" for "Type of Event" and click on the "Recurrent Options" button (refer to Recurrent Event).

6. For the "Portal Calendar," do all users see all events?

   No. You must grant users access to the event in order for them to view and read it.

7. Why can't I edit or delete an event on the "Portal Calendar"?

   Only the event administrator (i.e. person who created the event) can edit or delete an event. For private calendars, users must be granted "Admin" or "Read/Post" rights to edit or delete an event.

8. How do I create a private calendar?

   From "Calendar," click the "Create New Calendar" button (refer to Create Private Calendars).

9. What kind of information can I post in the description box?

   The description box is an unlimited text box. You have the option of typing in a summary of your event, the entire event agenda or information on where users can go if they have additional questions. What you type is up to you, but please try to be as descriptive as possible.

10. How do I add users to my private calendar?

    At the "Assign Access" screen, highlight the users' names in the "Available Users" field, click on the ">" button to grant them access.

11. I noticed that the "Portal Calendar" events are viewed in black. How do I select a color for my calendar?

    Refer to Change Calendar Colors.

12. How Do I add an event to my calendar?

    Click on the "Add Event" link and select your calendar title (refer to Add Event to Private Calendar).

Section 5 - Channels

The Channels tool provides a more flexible grouping mechanism that can be used to grant access to data across all core collaboration tools. A Channel is a “special” organization that allows collaboration among users that normally cannot see each other. Users from any sponsoring organization can be invited into a channel. Channels will appear along with “Users,” “Organizations,” and “My Groups” in the access control list when adding data to the portal. This tool is available in all the core collaboration tools.

Site Administrators are the only users that can create a channel. Once a channel is created, other users can be named an admin over that particular channel.

To access Channels, select the “Channels” link from the Home page, under the Collaboration Tools menu. Alert features are displayed in the navigation bar based on the user right.

Channels Information

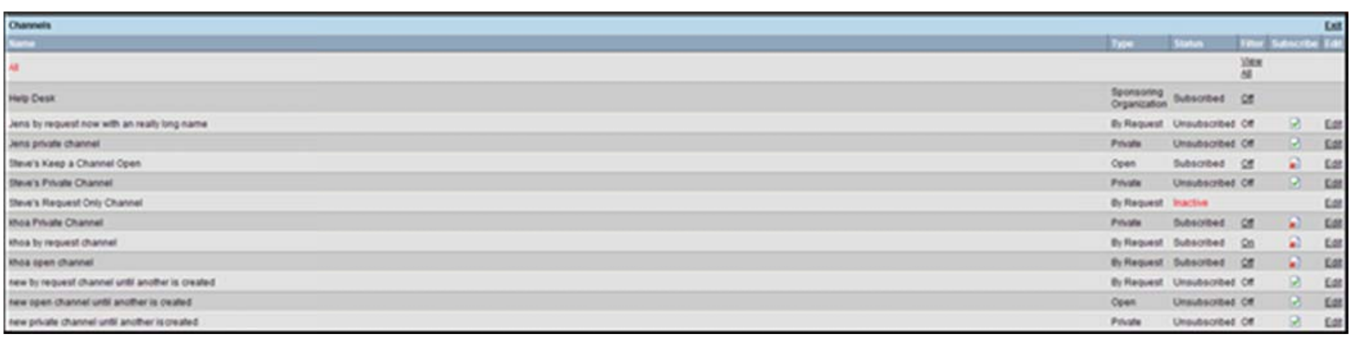
The Channels screen gives the user all the information about the available channels that the user can subscribe to. The first column provides the name of the channel. The second column gives the type of channel. There are three types of Channels that the SA can create.

- Open Channel: allows any portal user, regardless of organization affiliation, to subscribe.
- Private Channel: visible only to those users explicitly invited.
- By Request Channel: visible to all users, but users cannot subscribe to the channel without being vetted by a channel administrator.

The user will be able to view all Open and By Request Channels, as well as those Private Channels that the user was given explicit access to by the admin.

The Channels screen also gives a user’s status within a particular channel.

- Subscribed: the user has access to the indicated channel.
- Unsubscribed: the user does not have access to the channel and has to subscribe in order to utilize the channel.
- Not a Member: this status is associated with By Request channels; the user does not have access but the user can request access.


Channels | Exit

Name	Type	Status	Filter	Subscribe	Edit
All			View All		
Help Desk	Sponsoring Organization	Subscribed	Off		
Jens by request now with an really long name	By Request	Unsubscribed	Off		Edit
Jens private channel	Private	Unsubscribed	Off		Edit
Steve's Keep a Channel Open	Open	Subscribed	Off		Edit
Steve's Private Channel	Private	Unsubscribed	Off		Edit
Steve's Request Only Channel	By Request	Inactive			Edit
Khoa Private Channel	Private	Subscribed	Off		Edit
khoa by request channel	By Request	Subscribed	On		Edit
khoa open channel	By Request	Subscribed	Off		Edit
new by request channel until another is created	By Request	Unsubscribed	Off		Edit
new open channel until another is created	Open	Unsubscribed	Off		Edit
new private channel until another is created	Private	Unsubscribed	Off		Edit

Figure 1.0 - Channels Main Screen

Subscribe to a Channel

If the status of an Open Channel is “Unsubscribed” and the user wants to subscribe, the user must:

1. Click on the button to subscribe to the channel.
2. A user has successfully subscribed to the channel when the subscribe button is , and the status changes to “Subscribed.”

Unsubscribe to a Channel

When a user no longer wishes to be a member of an open channel, the user must unsubscribe.

1. Click on the button to unsubscribe to the channel.
2. A user has successfully unsubscribed to the channel when the subscribe button is , and the status changes to “Unsubscribed.”

Access to By Request Channel

If a user wants access to a “By Request” channel, he or she must request access from the admin.

1. Click the “Request” link under the “Subscribe” column.
2. The user has successfully subscribed to the channel when the “Request” link is replaced by the word, “Requested.”
3. The user has access to the channel once the admin approves the request, and then the user can start to utilize that channel.

Using Channels

Each collaboration tool has an Access Control List (ACL), where the user can designate which users on the portal can have access to the information. To assign available users to the information, the user can filter his or her view to a specific organization or channel to limit the number of available users.

1. Click on the “Secure Messaging” link on the desktop.
2. Click on the “Compose Message” link (refer to Figure 1.1).

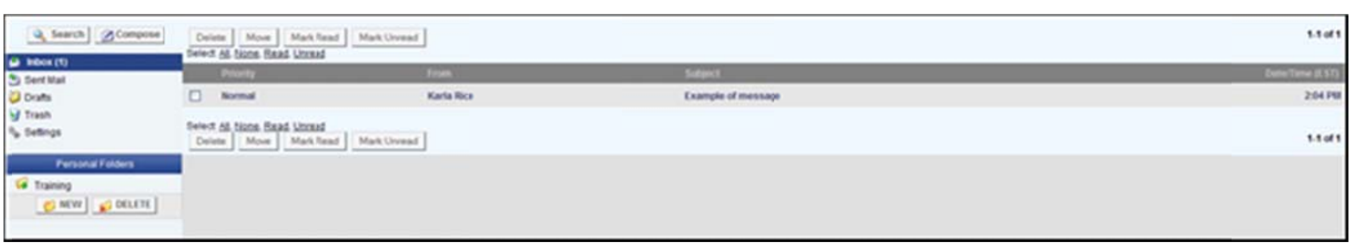


Figure 1.1 - Secure Messaging Inbox

3. By default, “Orgs” and “My Groups” are selected as search criteria in the ACL portion of the window.

4. Select “Channels” by clicking within the box to the left.
5. Click on the “Refresh” button.
6. To narrow the search, the user can enter the name or partial string of the channel in the search field. Click the “Search” button.

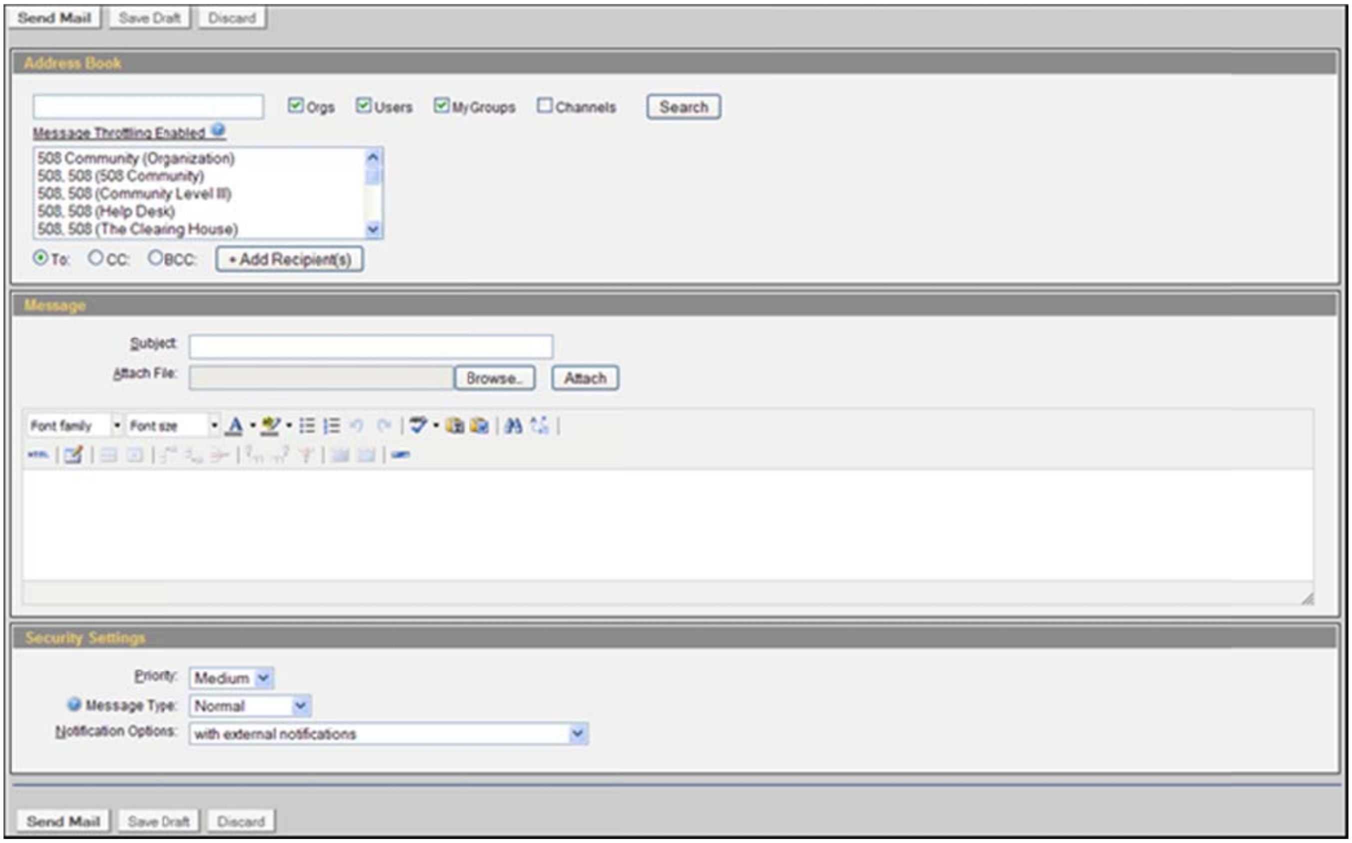


Figure 1.2 - Compose New Message

7. Highlight the desired channel. Click on the “Add Recipient” button.
8. Continue to fill in the appropriate fields as explained in the Secure Messaging User Guide. When the user sends the secure message, it is received by every user that is a member of the channel chosen.
9. Follow the same instructions for the other core tools.

Frequently Asked Questions (FAQs)

1. Can I subscribe to a channel even though I do not belong to the organization?

   You can subscribe or request access to any channel, regardless of organization affiliation. Channels are "special" organizations that allow collaboration between users that normally cannot see each other. Refer to section Channels Information.

2. Channels are available for use in which tools?

   Channels are available in all the core collaboration tools to include: Secure Messaging, Library, Calendar, Online Briefings, Forum Discussions, Survey Wizard, Chat, WebPort, TaskTrac, and Alerts.

3. How do I subscribe to a channel?

   Within the channel tool, you need to click on the button to subscribe to an open channel. Refer to section Subscribe to Channel.

4. How do I gain access to a By Request Channel?

   On the Channel main page, you need to click on the "Request" link to request access to a By Request Channel. The administrator of the channel then must approve your request in order for you to be a member of that channel. Refer to section Access to By Request Channel.

5. Can I register for a Channel?

   Users cannot register into a channel organization. A channel cannot be assigned as a sponsoring organization. The user must have an existing account within the portal.

6. If I have been made a member of a channel by an admin, do I have to participate in the channel?

   Channel "subscription" is always optional. The user can subscribe and unsubscribe to any channel at any given moment. Refer to section Channels Information.

Section 6 - Chat

Chat provides portal users a way to communicate real time with other members in the portal. Any user can initiate a new chat room. Access to a Chat Room is granted on an individual or organization basis. Each chat room has only one administrator.

To access the "Chat" tool, click on the "Chat" link from the Home Page or from the navigation bar.

Chat Room

As shown in Figure 1.0, the main "Chat Room" allows users to create a new chat, join a chat and view users currently logged on the portal.

- To create a new chat, Click on the "Create New Chat Room" link located on the right side of the screen.
- To view users that are currently logged into the portal, click on "Users Logged On."

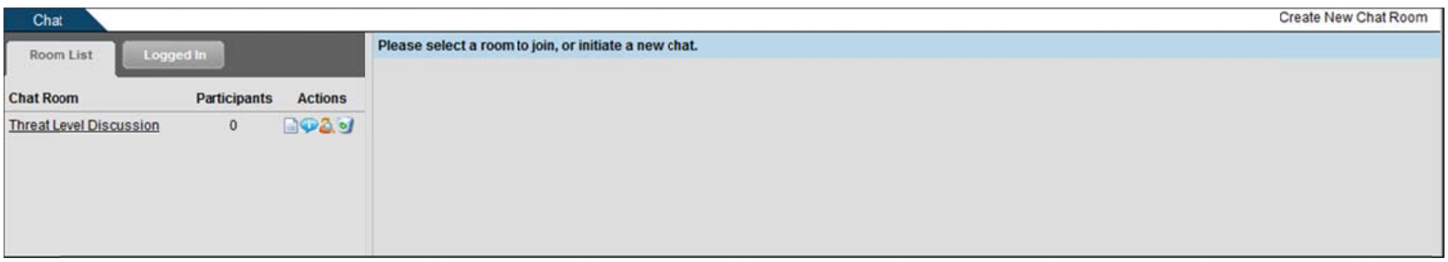


Figure 1.0 - Chat Room

Section 2 – Create New Chat Room

Create Chat

1. Click on the "Create New Chat Room" link (see Figure 1.0).
2. You should be transferred to the page to name the Chat and assign users (see Figure 1.1).

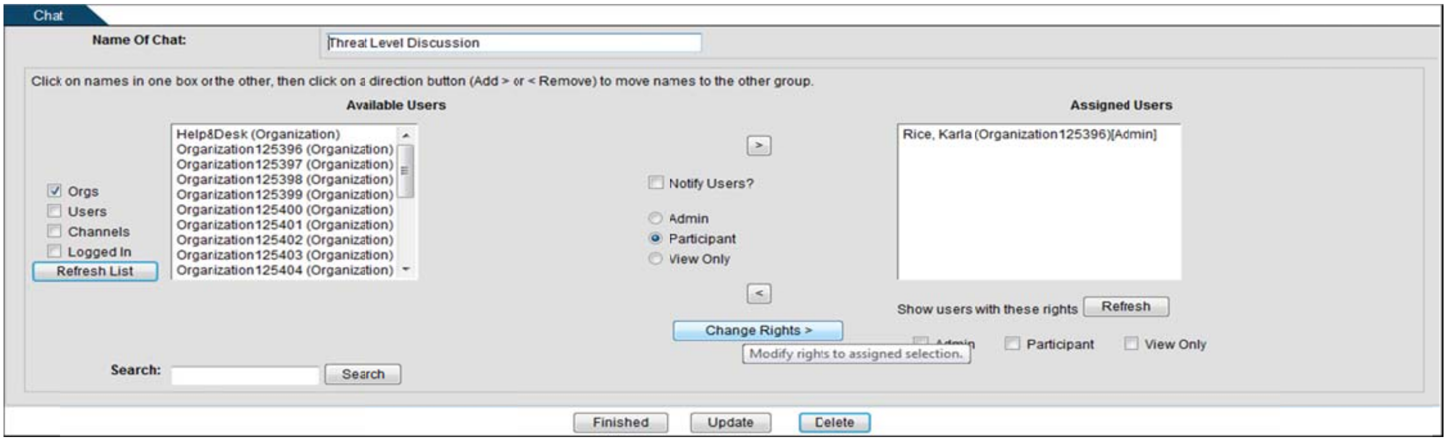
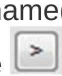


Figure 1.1 - Chat Management

Assign Users

When creating a chat room, users must be assigned access to the chat (see Figure 1.1).

1. Type in the name of the Chat in the provided text box.
2. Select the “Orgs,” “Users,” “My Groups,” and/or “Channels” check boxes.
3. Click on the “Refresh” button and the Available Users list is automatically updated with users based on your choice above. Depending on your portal configuration, if you choose the “Users” radio box, you may need to specify search criteria and execute a search before the list will contain matching and available records.
4. Type in the name of a user, group, or organization in the “Search” field. Depending on your portal configuration, the administrator may have set a minimum number of search characters. (The minimum number of search characters does not apply to Site and Community Administrators). You will receive an error message if there is a minimum set and you have entered fewer characters than the set minimum (see Figure 1.3).
5. Click on the “Search” button.
6. Highlight user name(s), select the appropriate radio box for “Admin,” “View Only,” or “Participant” rights, and click on the  button to grant users access. The default access right is “Participant.” (NOTE: “View Only” rights allow a user to view the chat, but they cannot post any comments.)
7. To change a user right, select the right, highlight the user’s name in the “Assigned Users” field, and click on the “Change Rights” button.
8. To view users with a particular right (e.g., “Admin”) select the appropriate user right checkbox under “Show Users With These Rights” and click on the “Refresh” button. The “Assigned Users” field is updated.
9. Select the  button to move a user back to the “Available Users” list.
10. Click on the “notify users” check box to send users an email to participate.
11. Choose the “Cancel” button to cancel the action.
12. Click on the “Update” button to save the information and continue to next page (see Figure 1.2).

13. On this page you may “Update”, “Cancel”, or click Finished.
14. Select the “Finished” button to return to the “Chat” screen.

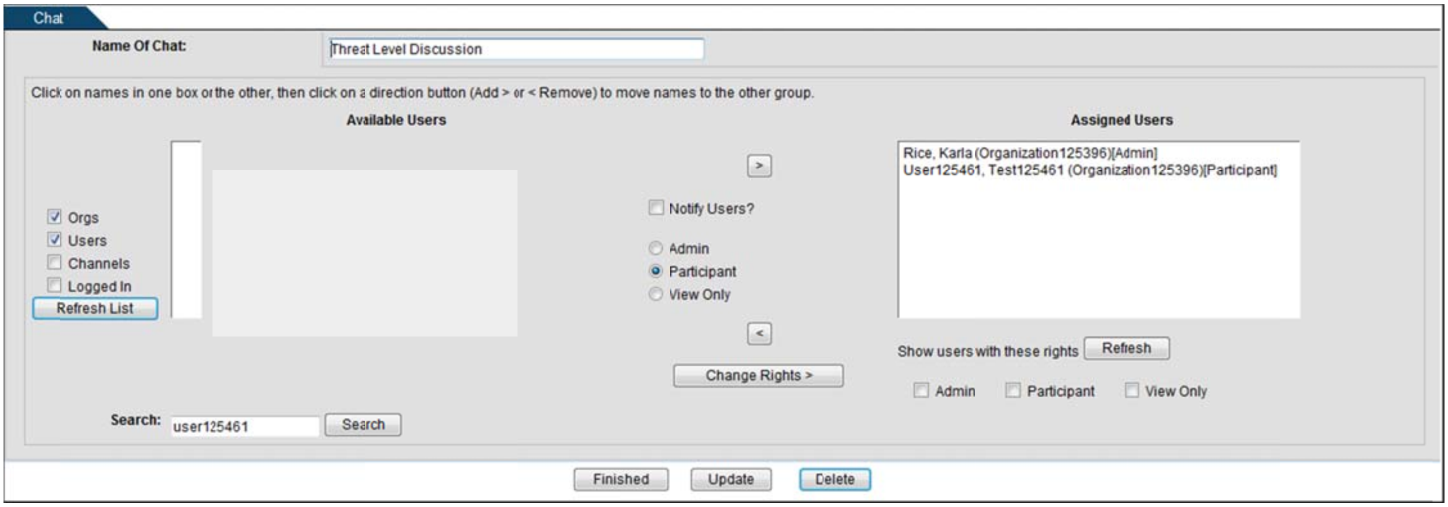


Figure 1.2 – Manage Access

To select multiple user names in a row, hold the shift key and highlight the names and click on the “>” button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names, and click on the “>” button.

Delete Chat

1. Click on the “Manage Access” link.
2. Click on the “Delete” button to allow the administrator to delete the chat room. A confirmation screen is displayed.
3. Click on the “Delete” button to delete the chat room (see Figure 1.3). Once a chat room is deleted, it cannot be retrieved.
4. Click on the “Cancel” button to cancel the action and return to the “Chat Management” screen.

Figure 1.3 – Delete Chat Confirmation

Section 3 - Join Chat

1. Use the drop down arrow to click on the title for the chat room.
2. Click on the "Join Chat" button to participate.
3. A list of participants is shown under the "Current Participants" heading. The number next to the chat title reflects the number of participants (see Figure 1.4).

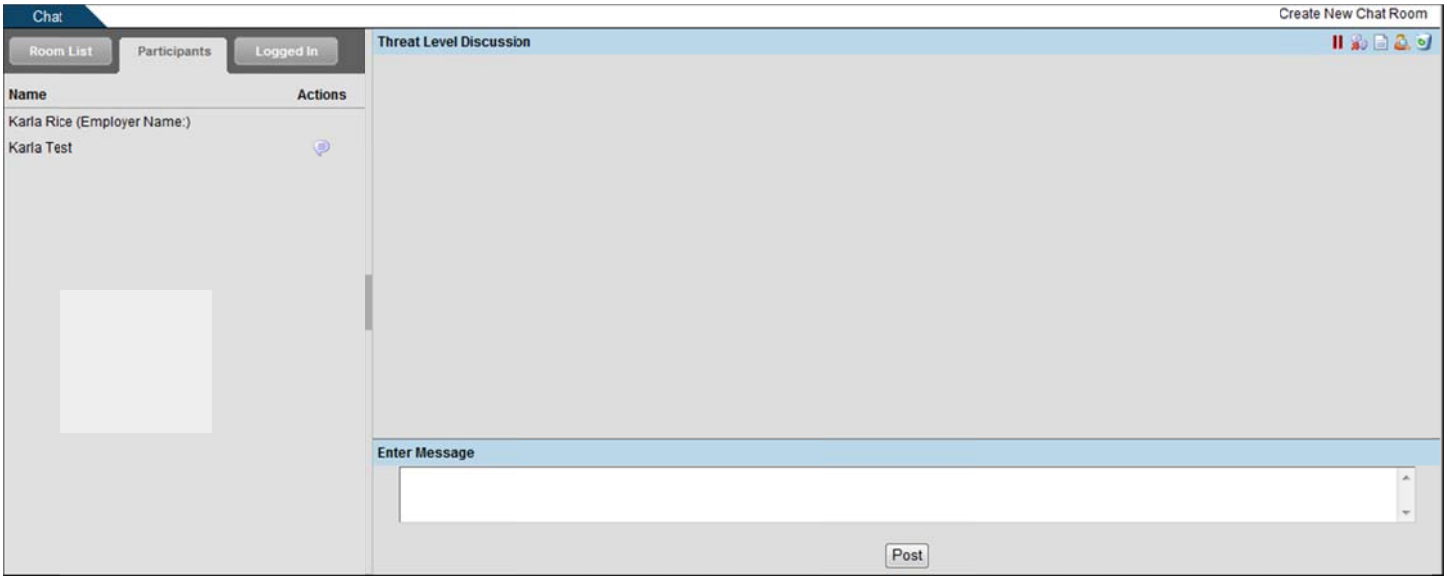


Figure 1.4 - Chat Room

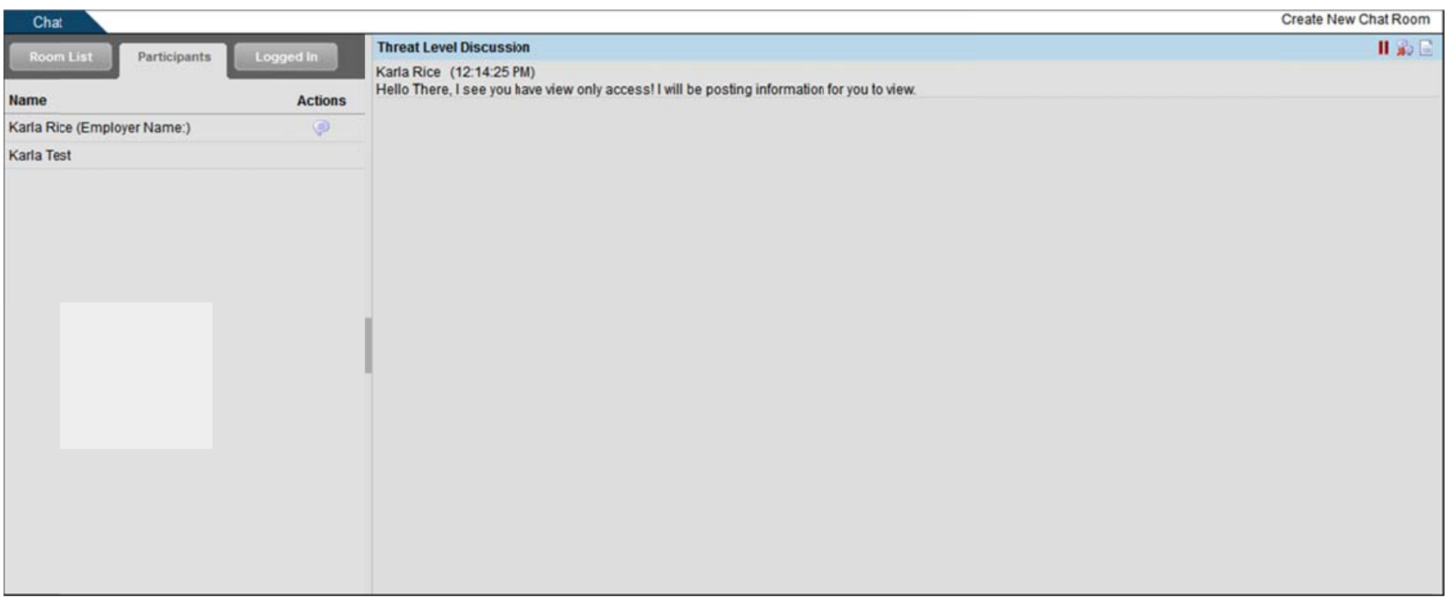


Figure 1.5 – View Only Access

Post Message

1. Type the message in the "Enter Message" text box (see Figure 1.4). If the user only has "View Only" access, there will not be a text box visible (see Figure 1.5).
2. Click on the "Post" button.
3. Once the message is sent, it appears at the top with the participant's name, date and time, and the actual message.
4. As the owner of the message, click on the delete icon to remove the posting. Once a message is posted, it cannot be edited. To edit, enter a new message and post it.

Open Sidebar Chat

The Sidebar Chat allows a user to contact another chat participant and have a side chat while the original chat takes place. A Sidebar Chat can only take place between two users, but each user has the capability for multiple Sidebar Chats. Sidebar Chat participants can be drawn from the active Chat session (including "View Only" members) or from the list of active portal members within the user's visibility.

The Sidebar Chat content cannot be archived or printed. When the user leaves the active chat session, the portal will close any active Sidebar Chat sessions.

1. Click on the button located before the user's name who you would like to open a Sidebar Chat with (see Figure 1.5).
2. The user who is selected to chat with will have a link on their chat page to accept the Sidebar Chat invitation. Click on either the accept icon or decline icon (see Figure 1.6).
3. If the decline icon is selected, the message, "Your invitation has been declined," appears in the open Sidebar Chat window. Click on the leave icon (see Figure 1.8).
4. Type the message within the Text box and click on the "Post" button (see Figure 1.7).
5. To leave the Sidebar Chat, click on the leave icon (see Figure 1.7).

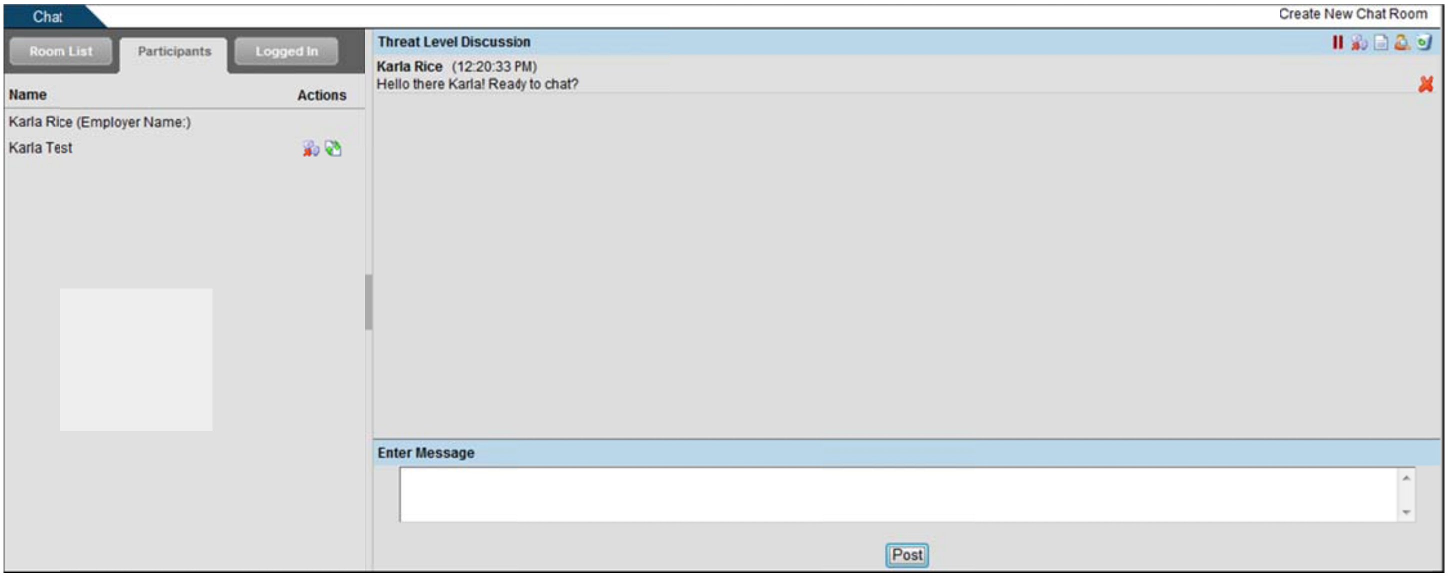


Figure 1.6 – Sidebar Chat Invitation

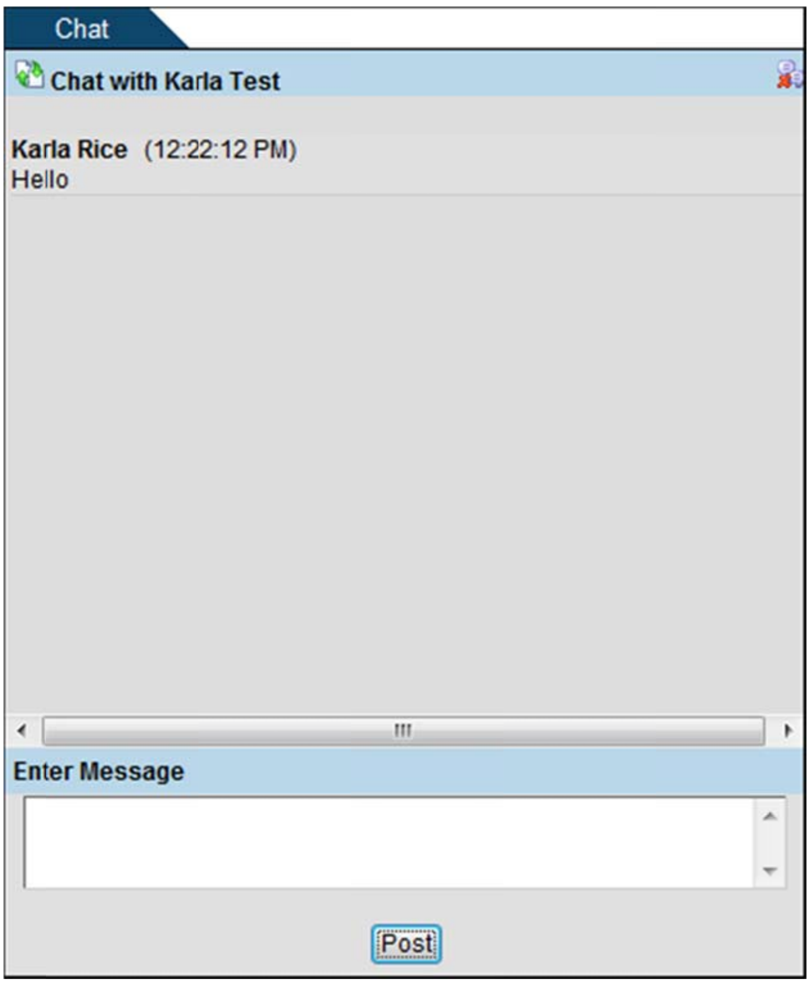


Figure 1.7 – Sidebar Chat

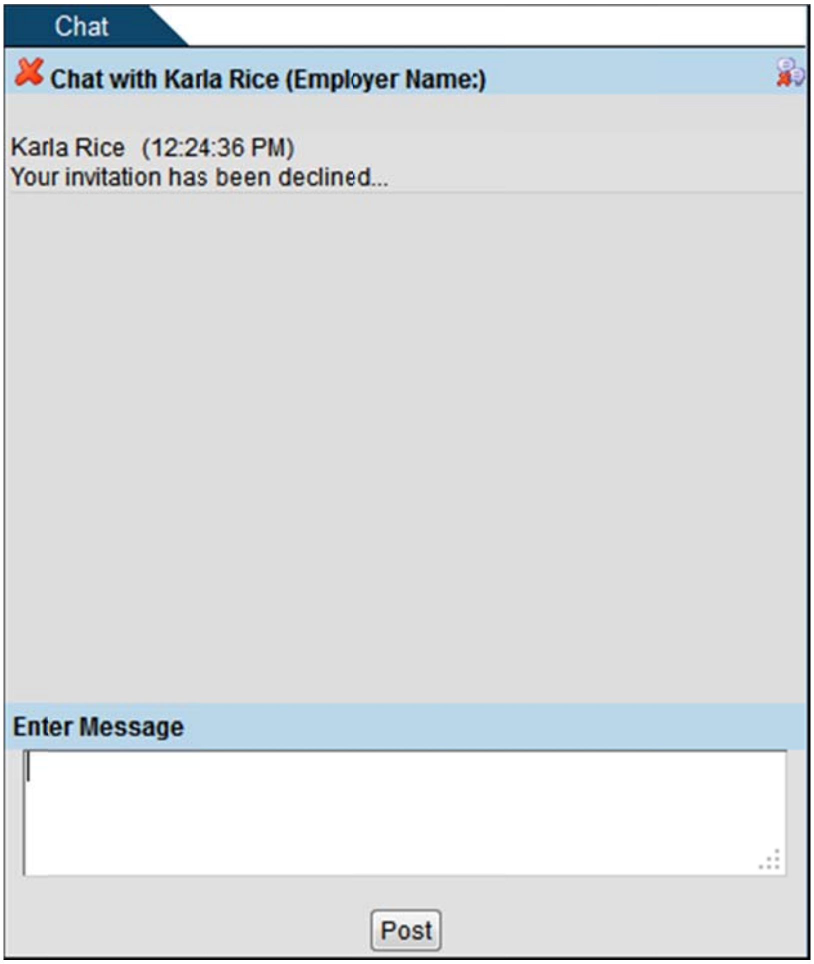


Figure 1.8 – Declined Sidebar Invitation

View Transcript

1. To view chat transcripts, click on the icon. Transcripts are shown from a 24 hour period to a complete record of the chat to include history length, message composer, posted date and time, and the actual message (see Figure 1.9).
2. Use the drop down arrow to view transcripts within 24 hours, 48 hours, 72 hours or Complete for "History Length,"
3. Click the "Refresh Page" button. The transcript is shown.
4. To return to the "Chat Room" screen, close the browser window.

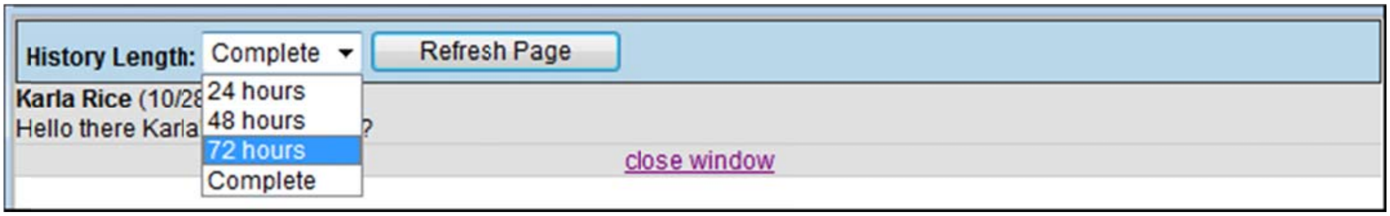


Figure 1.9 - View Transcript

Chat Room Info

1. To view chat info, click on the icon. A pop-up will show: the owner, date created, date/time of first and last post, number of messages posted and users with access (see Figure 1.10).
2. To return to the "Chat Room" screen, select the close window link.

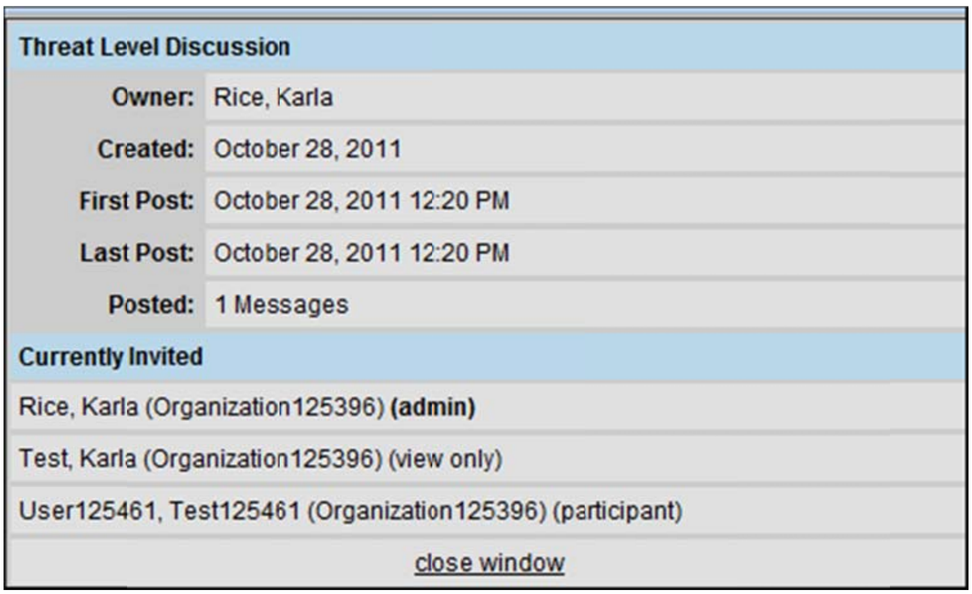


Figure 1.10 – Chat Info

Leave Chat

1. To leave a chat or visit a different chat, click on the leave icon on the right side of the screen.
2. If this link is not selected, the user's name appears in the "Participants" area and the other members may assume the user remains active within the chat room.
3. Once the leave icon is selected, the participant is removed and the user returns to the "Chat Room" screen.

Section 4 - Frequently Asked Questions (FAQs)

1. Who can create a Chat Room?

   Any user can create a Chat Room.

2. Can everyone on the portal see my Chat Room?

   Members that have been granted access can see your Chat Room. Refer to Assign Users.

3. How do I create a Chat Room?

   To create your own Chat Room, click on the "Create New Chat Room" link, enter the chat name and grant users access. Refer to Create Chat section.

4. How do I grant access to my Chat Room?

   From the "Chat Management" screen, highlight the user names, select the appropriate access right (i.e., Admin or Participant), and click on the directional arrow ">" to grant access.

5. After I've created a new chat and assigned users, how are the users notified?

   At the "Chat Management" screen, there is an option to notify users to join the chat. Click on that check box and users are sent an email.

6. How do I post messages to my Chat Room?

   Once you click the chat name to enter the chat, enter your comments in the text box located at the bottom. When you have completed your posting, click on the "Post" button to send the message. Refer to Post Message.

7. How can I delete my Chat Room?

   Only chat administrators can delete a chat room. Click on the "Manage Access" link at the top and select the "Delete" button at the bottom of the "Chat Management" screen. Refer to Delete Chat section.

8. How can I leave a Chat Room?

   To leave a Chat Room, click on the leave icon on the right side of screen. Once it is selected, your name is removed from the participant list.

Find Users/Member Locator

The core tool, Find Users/Member Locator, provides a means for locating other portal members within a user's organizational hierarchy. Any user can perform a search and view users that are logged into the portal.

To access this tool, click on the "Find Users" or "Member Locator" link in the navigation bar or select the "Find Users" or "Member Locator" link from the Desktop, under the Collaboration Tools menu.

Perform A Search

1. Type in the search criteria for first name, last name, email address, job title, employer, city, state and/or zip code. The Find Users feature is NOT case sensitive (see Figure 1.0).
2. Use the drop down arrows to select the sponsoring organization, job function, mail group membership, associations, and the appropriate "Sort By" option. The database can sort by first name, city, state and zip code. By default, the database is sorted by first name.
3. Click on the "Search" button to perform the search.
4. The Results page shows the results from the search. The results are listed in alphabetical order based on the "Sort by" criteria. User information within the database is listed under the "Name" and "Organization" fields (see Figure 1.1).
5. If the search reveals no matches within the database, users are prompted to click on the "Search Again" button. The "Find Users Screen" is displayed again (see Figure 1.2).
6. To yield all portal members within the organizational hierarchy, leave the search fields blank and click on the "Search" button. The Results screen will display 10 users. To view the next set of users, click on the "Next Page" button (see Figure 1.1).

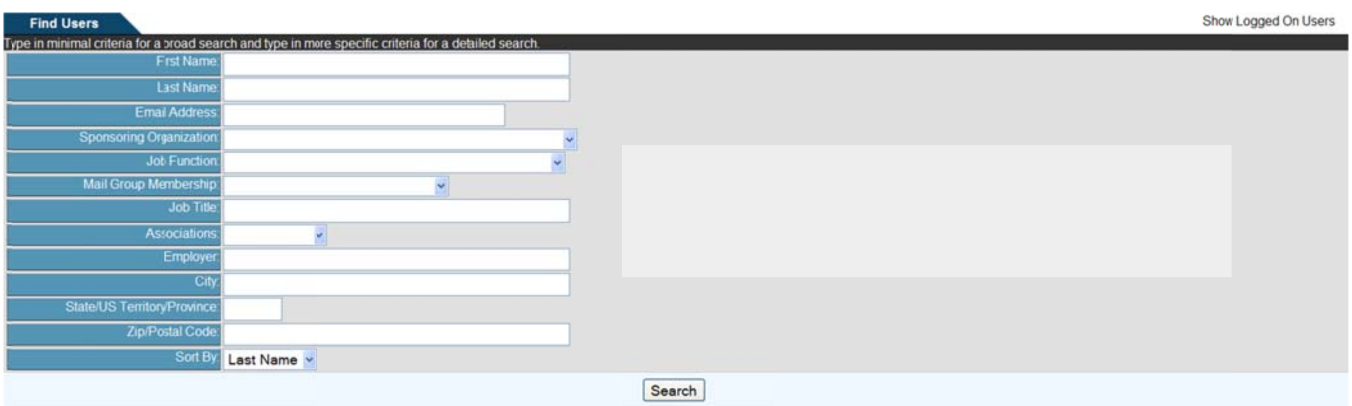


Figure 1.0 – Find Users Screen

To achieve matched information within the database, it is best to perform a broad search by entering minimal data and then narrowing the search by entering more detailed data. In addition, the first few letters of a user's name may be entered instead of the entire name when performing a search.

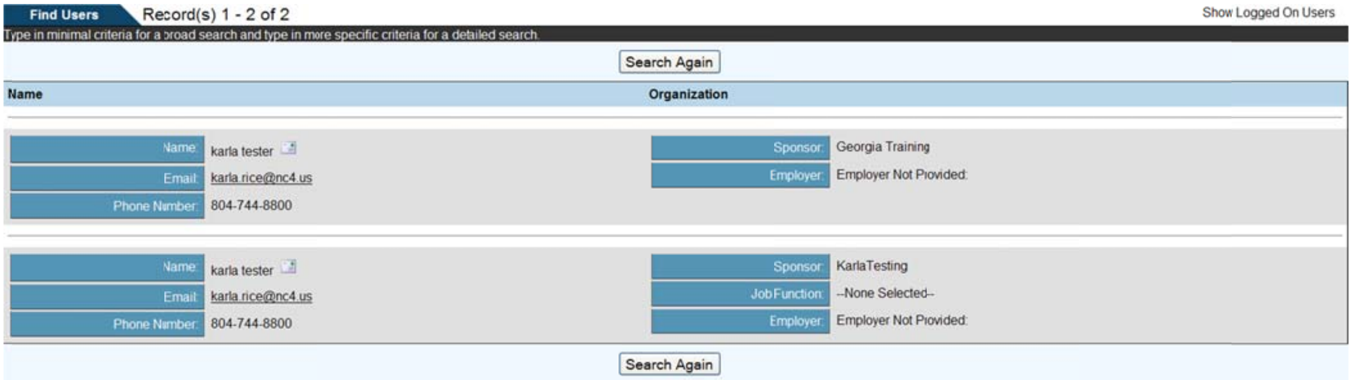


Figure 1.1 - Search Results

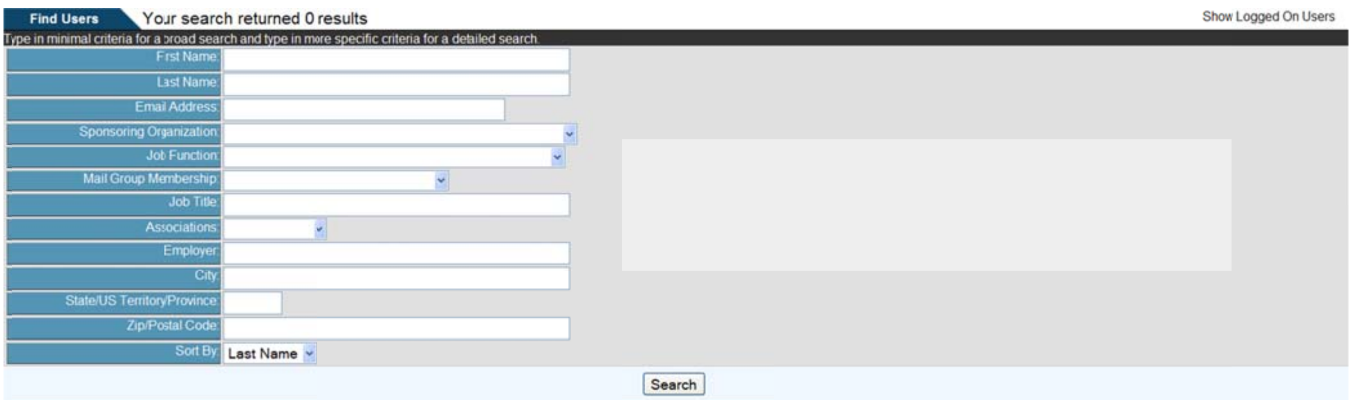


Figure 1.2 – Return 0 Results

Send Secure Message

The envelope symbol next to the user's name provides a link to the "Compose Secure Message" screen (see Figure 1.3). To compose and send a secure message, click on the envelope symbol.

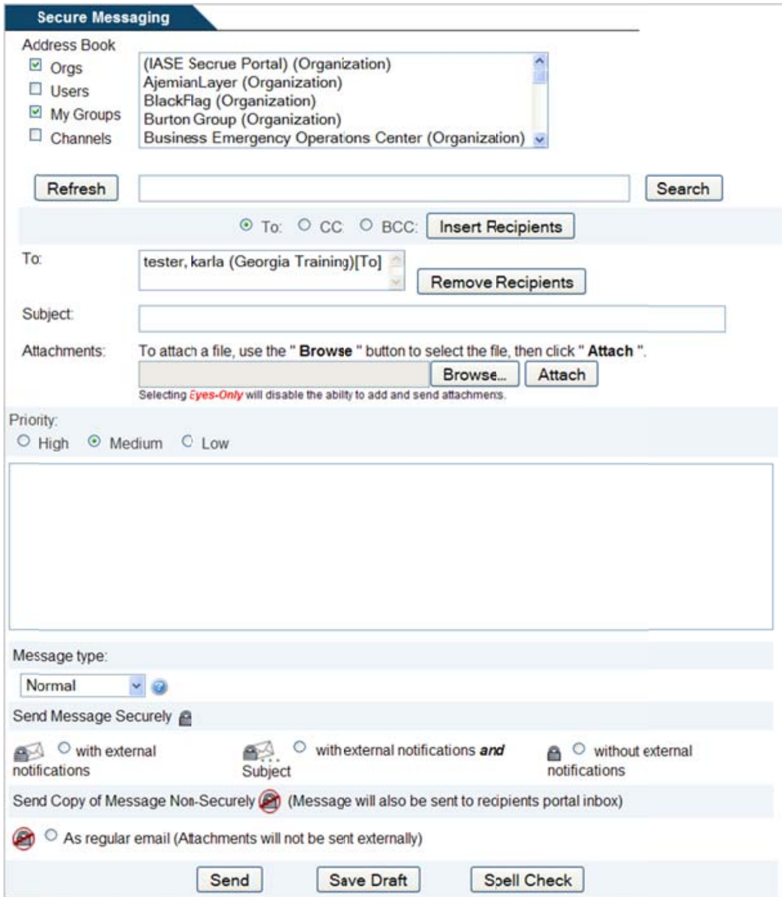


Figure 1.3 - Secure Message

Show Logged On Users

From the Find Users screen, a user can view all users logged onto the portal.

1. Click on the “Show Logged On Users” link in the navigation bar (see Figure 1.4).
2. To return to the Find Users screen, click on the link from the navigation bar.

Figure 1.4 – User Logged In

Frequently Asked Questions (FAQs)

1. Who has access to the Find Users/Member Locator feature?

   All portal users have access to the Find Users/Member Locator feature; however, they can only view users within their organizational hierarchy.

2. How do I conduct a search?

   From the Find Users screen, type or select the appropriate search criteria and click on the “Search” button. Please refer to the

   Perform A Search.

3. Is the search criteria case sensitive?

   No, you can use upper and lower case letters.

4. Do I need to complete the entire search screen before performing a search?

   No, you do not need to complete all fields. It is best to start with a broad search and then narrow the search with more detailed data. If you still do not retrieve results, click on the “Search Again” button and enter different search criteria.

5. My search results indicate 25 records; however, I only see 10 on the screen?

   By default, only 10 users are shown with any search result. To view the other users, click on the “Next Page” button. To return to the previous page, click on the “Previous Page” button. Use these buttons to navigate between search results.

6. In the “Search Results” screen, there is an envelope symbol. What does it do?

   The envelope symbol allows you to compose and send a secure message to a user. Refer to Send Secure Message for instructions.

7. How can I view who is logged onto the portal?

   Click on the “Show Logged On Users” link from the navigation bar at the top right of the screen. Refer to

   Show Logged On Users for instructions.

Section 7 - Forum Discussions

The Core Tool, Forum Discussions, allows users to host online threaded discussions with other users. The tool provides regular users several options for reading, posting, or searching for messages and creating new forums. The Forum Manager also has the option to manage forum settings. Any user can create a new forum. The person who creates the forum becomes the Forum Manager with the right to grant user access and user rights.

Each forum is comprised of threads and each thread contains messages. There may be multiple threads and these threads can have multiple messages. A thread is similar to conversations and is created by the user to narrow the discussion for a particular topic.

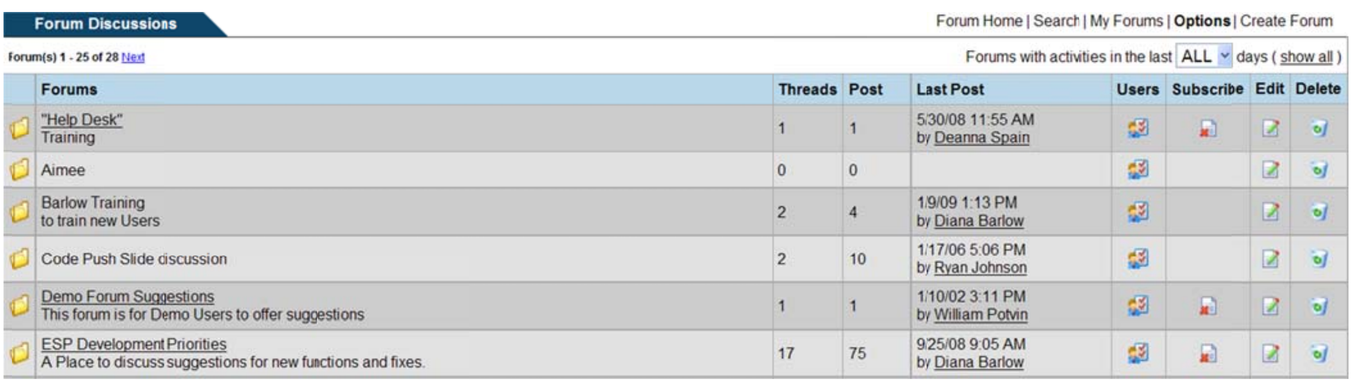
Forum Access Rights

Any user has the ability to "Change Rights" of an assigned user to a Forum as long as they have "Admin" rights over the Forum. These rights include the following:

- Admin [AM] – this feature enables the user to become the "Admin" of the Forum.
- Create Threads [CT] – allows the user to "Create Threads" within the existing thread.
- Post Replies [PR] – permits the ability to reply to existing posts within a thread.
- Attach Files [AT] – allows the user to "Attach Files" to their messages.
- View Only [VO] – allows the user assigned this right only "View" the forum.

Notify Users – this feature will notify users via their primary email address of their access to the forum.

Create Forum / Manage Access


Forum Discussions

Forum Home | Search | My Forums | **Options** | Create Forum

Forum(s) 1 - 25 of 28 Next

Forums with activities in the last ALL days (show all)

Forums	Threads	Post	Last Post	Users	Subscribe	Edit	Delete
"Help Desk" Training	1	1	5/30/08 11:55 AM by Deanna Spain				
Aimee	0	0					
Barlow Training to train new Users	2	4	1/9/09 1:13 PM by Diana Barlow				
Code Push Slide discussion	2	10	1/17/06 5:06 PM by Ryan Johnson				
Demo Forum Suggestions This forum is for Demo Users to offer suggestions	1	1	1/10/02 3:11 PM by William Potvin				
ESP Development Priorities A Place to discuss suggestions for new functions and fixes.	17	75	9/25/08 9:05 AM by Diana Barlow				

Figure 1.0 – Forums Main Page

1. Click on the "Create Forum" link to create a new forum and assign participants for the forum.
2. Provide a "Forum Name."
3. Provide a "Forum Description" (optional).

4. Select the “Users,” “My Groups,” and/or “Channels” check boxes.
5. Click on the “Refresh” button and the available users list is automatically updated with users based on your choice above. Depending on your portal configuration, if you choose the “Users” radio box, you may need to specify search criteria and execute a search before the list will contain matching and available records.
6. Type in the name of a user, group, or organization in the “Search” field. Depending on your portal configuration, the administrator may have set a minimum number of search characters. (The minimum number of search characters does not apply to Site and Community Administrators). You will receive an error message if there is a minimum set and you have entered fewer characters than the set minimum.
7. Click on the “Search” button.
8. Highlight the user name(s) and click on the “>” button to grant users access.
9. Select the “<” button to move a user back to the “Available Users” list.
10. Select the “notify user” box if the newly assigned user should receive a notification that he/she has been given access to the forum (optional).
11. Click on the “>” button to move the user(s) to the “Assigned Users” list.
12. Click on the “Finished” button when all the appropriate users have been given access to the forum.

To select multiple user names in a row, hold the shift key and highlight the names and click on the “>” button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names and click on the “>” button. The user names are moved to the “Selected Users” field.

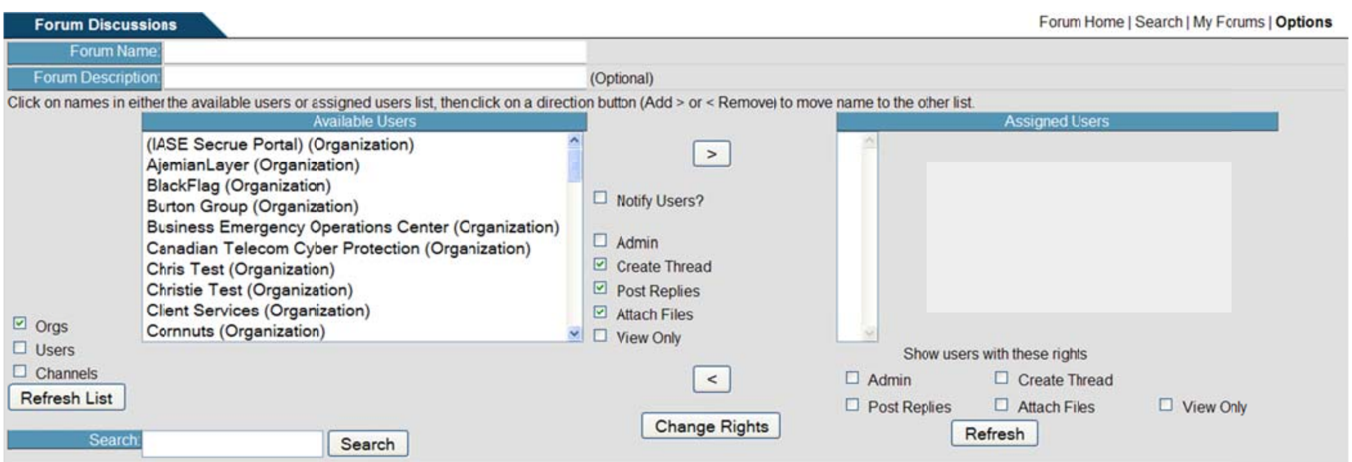


Figure 1.1 – Manage Access

Once the forum is created, the Forum Manager has the ability to view a specific user with a specific right. The manager can also view all available users with a specific right.

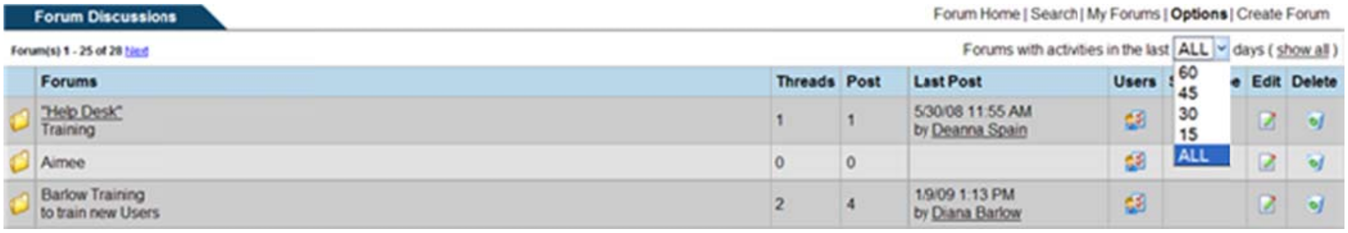


Figure 1.2 – Manage Forums Activity

Edit Forum

Once the forum is created, the Forum Manager can modify forum settings, add/delete users, and modify existing user access by selecting the “Edit” option.

Modify Forum and Add/Delete Users

1. Click on the icon under the “Edit” column located on the same row as the forum to be modified (see Figure 1.2).
2. Follow the instructions in the “Create Forum” section to edit the forum name, forum description, and add/delete users (see Figure 1.1).

Changing Rights of an Assigned User

Once the forum is created, the Forum Manager can change the rights of an “Assigned User.” The different types of rights are defined in the section entitled “Rights of an Assigned User.”

1. Click on the icon located next to the forum to modify (see Figure 1.2).
2. Highlight the name(s) of the desired “Assigned User(s)” (see Figure 1.1).
3. Change the rights of the user by checking the appropriate box to the left of the listed rights.
4. Click on the “Change Rights” button.
5. Click on the “Finished” button to return to Forum Discussion.

Subscribe/Un-Subscribe to Forum

A user has the ability to subscribe to a Forum as long as they can see the forum.

Subscribe

Click on the icon located in the corresponding row for the particular forum (see Figure 1.3).

Un-Subscribe

Click on the icon located in the corresponding row for the particular forum (see Figure 1.3).

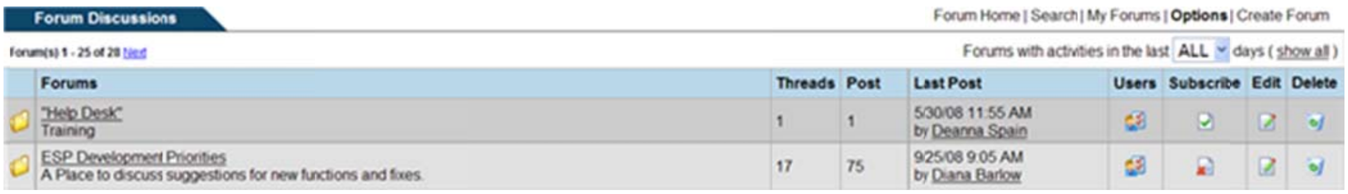


Figure 1.3 – Forums, Subscribe

Delete Forum

Once the forum is created, any user with an “Admin” right has the ability to delete the Forum.

1. Click on the icon located in corresponding row for the particular forum to “Delete” (see Figure 1.3).
2. Click on the “OK” button within confirmation pop-up window to verify the deletion. Once deleted, the forum CANNOT be retrieved (see Figure 1.4).

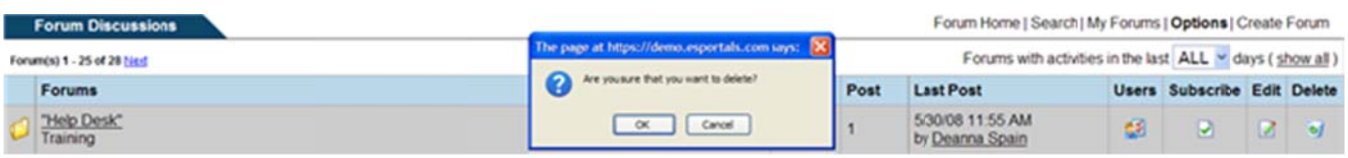


Figure 1.4 - Delete Confirmation Screen

Threads and Posts

Add/Edit Threads

Each forum comprises of threads, which contain messages. The user with “Create Thread” access rights can “Add” to an existing thread. Only the “Admin” of the forum can modify and/or delete the thread.

Add Thread/Post to New Forum

A user that has been granted rights to “Create Thread” to a newly created forum can add a new post to the thread.

1. Click on the forum title (see Figure 1.1).
2. Type in a “Thread Title” (see Figure 1.5).
3. Type in a “Thread Summary” (optional).
4. Click on the “Create Thread” button.

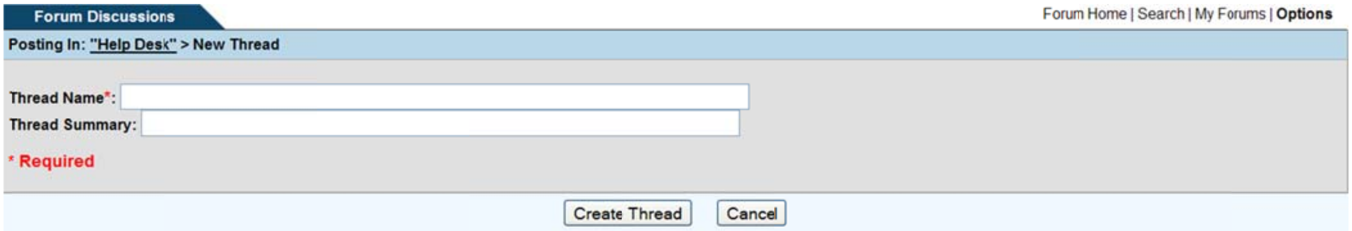


Figure 1.5 – Create a Thread

5. Change the “Post Title” if desired (see Figure 1.6).
6. Add body text to the post.
7. Click on the “Preview Post” button to review the thread (optional) (see Figure 1.7).
8. Click on the “Submit Post” button.

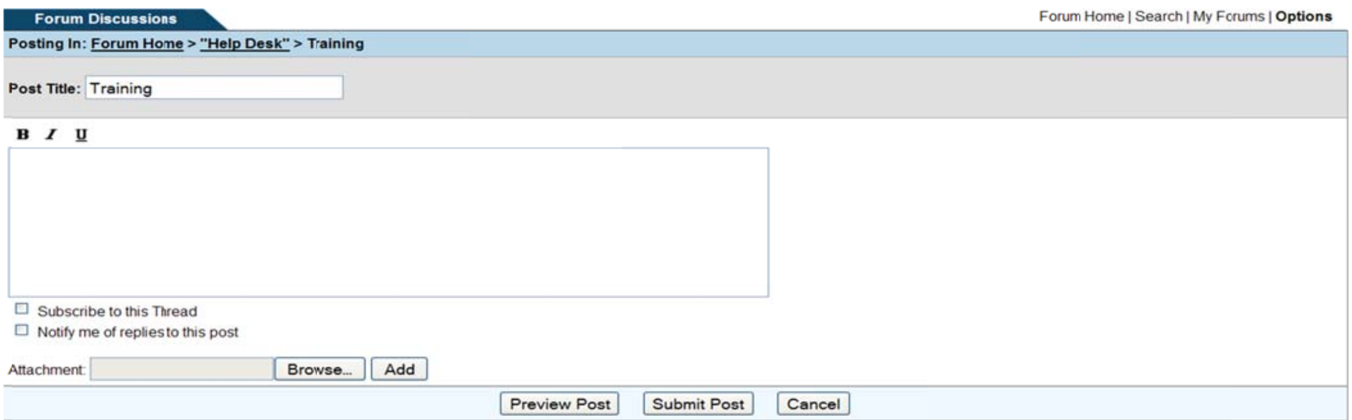


Figure 1.6 – Adding a Post

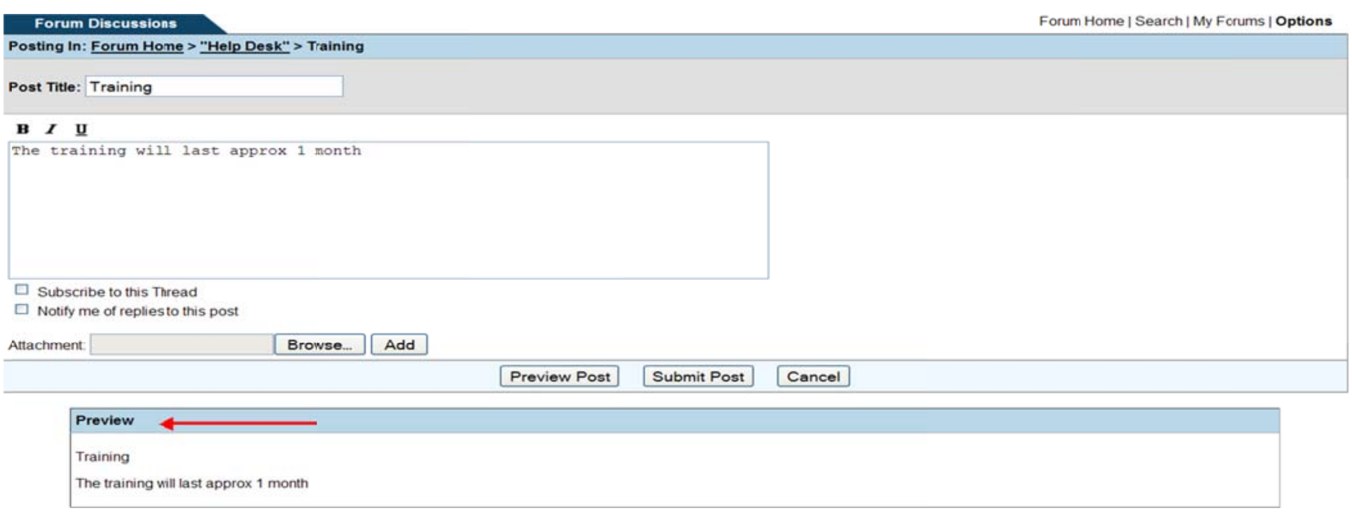


Figure 1.7 – Preview Post

Add Thread/Post to Existing Forum

A user who has been granted rights to "Create Thread" to an existing forum can add a new post to the thread.

1. Click on the forum title.
2. Click on the thread title (see Figure 1.8).
3. Click on the "Add Thread" link (see Figure 1.9).
4. Type in a "Thread Title."
5. Type in a "Thread Summary."
6. Click on the "Create Thread" button.
7. Change the "Post Title" (optional).
8. Add body text to the post.
9. Click on the "Preview Post" button (optional).
10. Click on the "Submit Post" button.

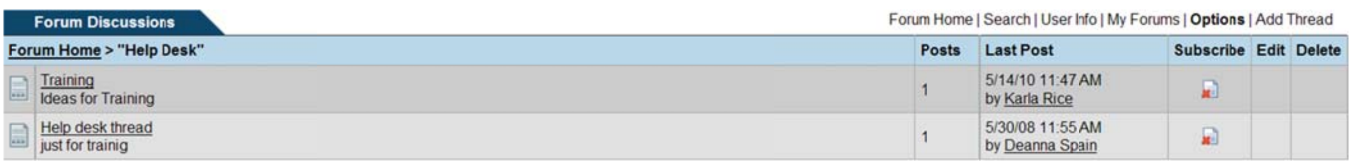


Figure 1.8 - Thread Title

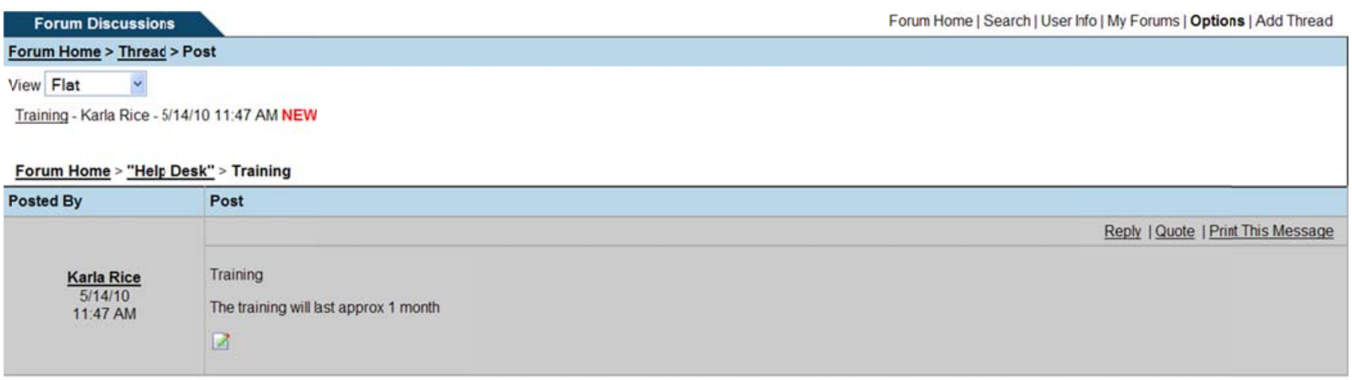


Figure 1.9 – Modify Thread

Special Text for New Post

When adding a new post, the user has the ability to modify the post body text by using **B** (bold), *I* (italic), and/or U (underlining). This is an optional feature.

1. Click on the forum title.
2. Provide the "Thread Title."

3. Provide the “Thread Summary.”
4. Click on “Create Thread.”
5. Change the “Post Title.”
6. Click on either **B** for bolding, *I* for italic, and/or U for underlining (see Figure 1.7).
7. Provide the text in the pop-up window (see Figure 1.10).
8. Click on the “OK” button located on the pop-up window.
9. Click on “Preview Post” (see Figure 1.11).
10. Click on “Submit Post” (see Figure 1.11).

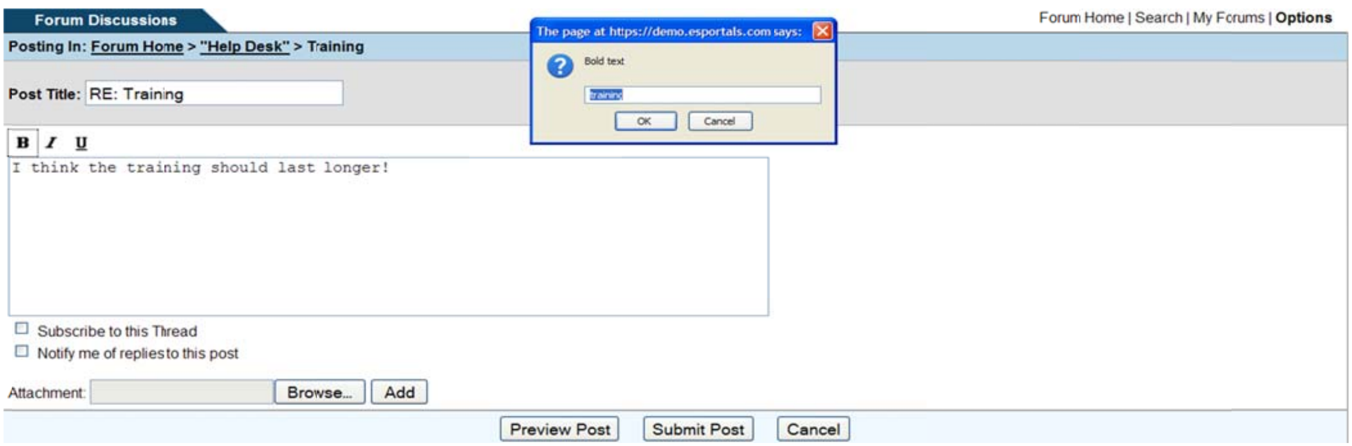


Figure 1.10 – Adding “Bold, Italic and/or Underlining” Text

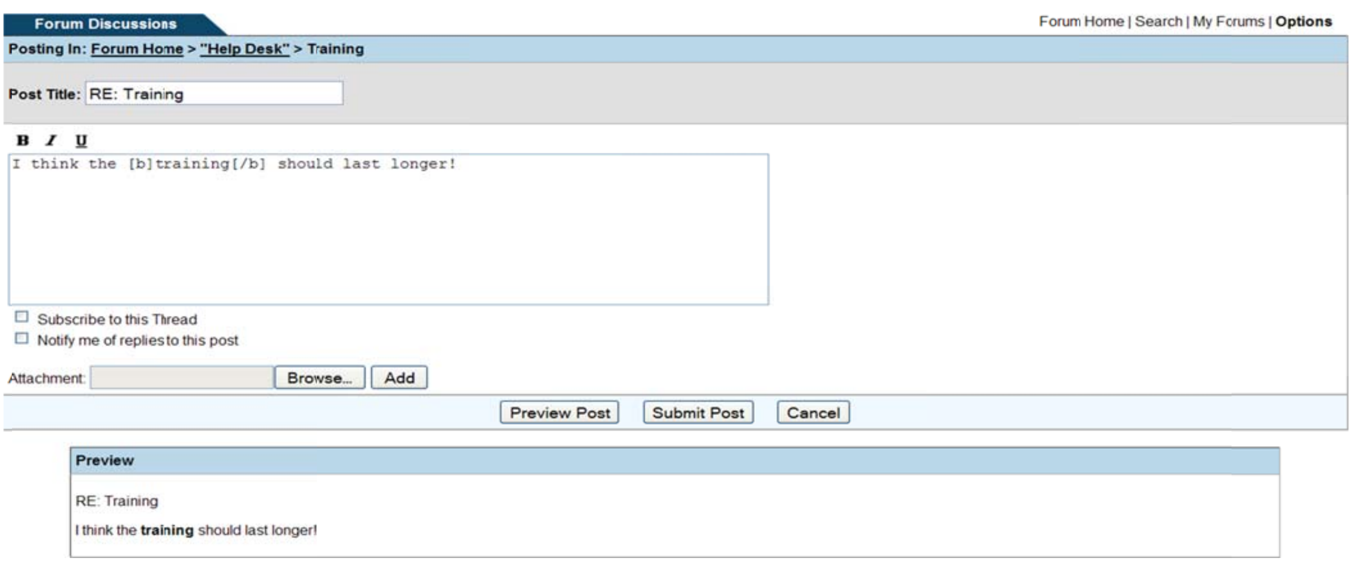


Figure 1.11 – Preview Post

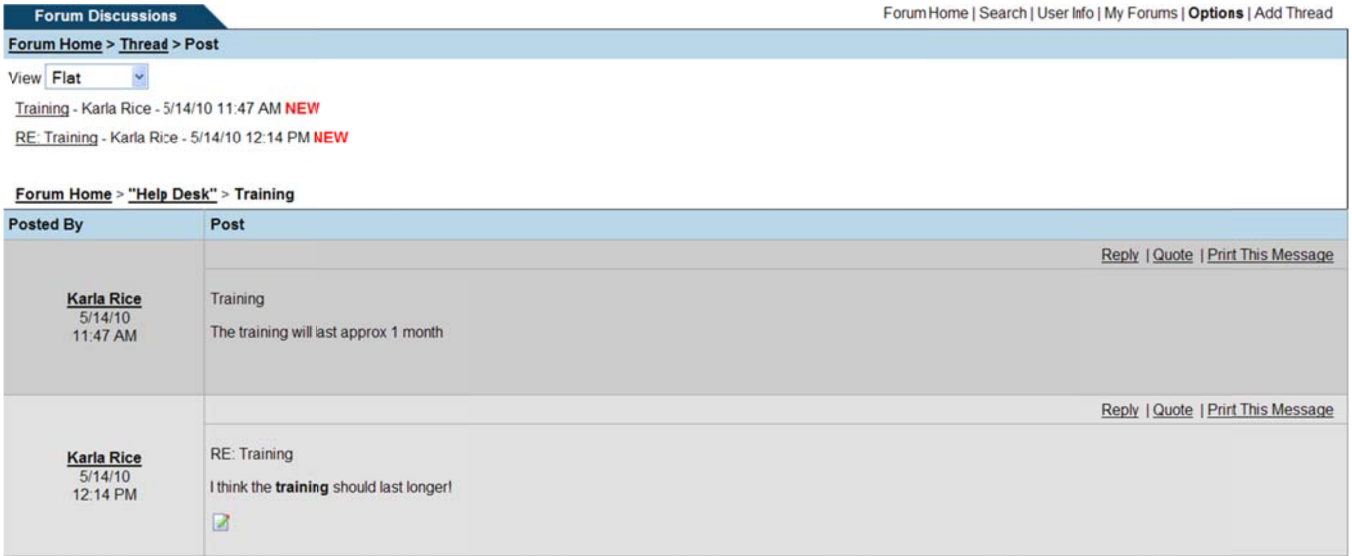


Figure 1.12 –Thread Postings

Adding Attachments

Any user that has been granted access to “Create Threads” to a forum has the ability to “Add Attachments” to the “Post.”

1. Click on the forum title.
2. Provide the “Thread Title.”
3. Provide the “Thread Summary.”
4. Click on the “Create Thread” button.
5. Provide the body text to the post.
6. Click on the “Browse” button to add attachments (see Figure 1.11).
7. Select the desired file and click the “Open” button (see Figure 1.13).
8. Click the “Add” button to attach the document(s) (see Figure 1.14).
9. Click on the “Preview Post” button (optional).
10. Click on the “Submit Post” button to view “Post” with “Attachment” (see Figure 1.15).

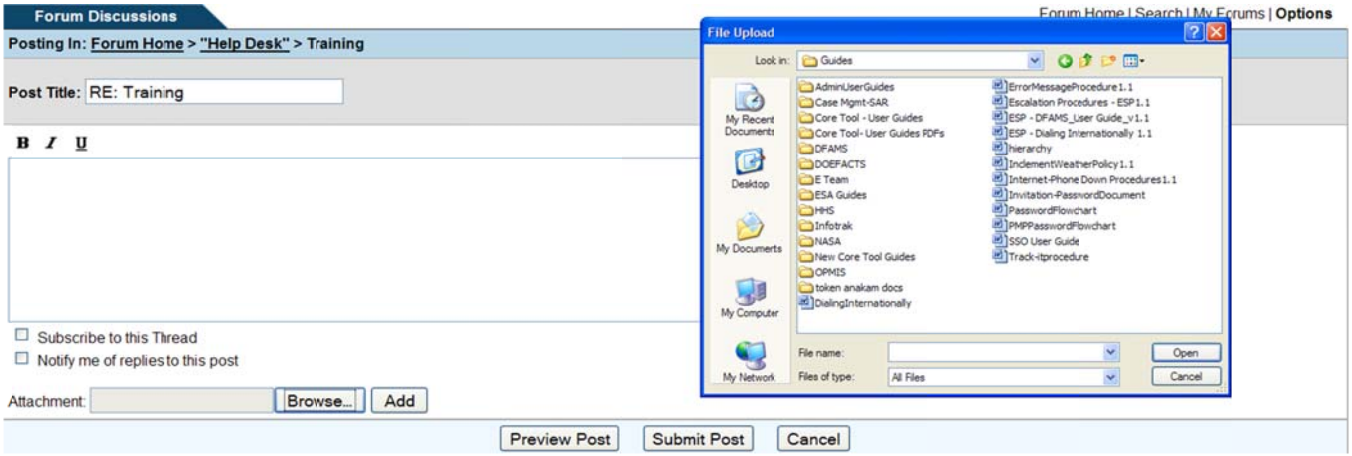


Figure 1.13 – Browse pop-up window

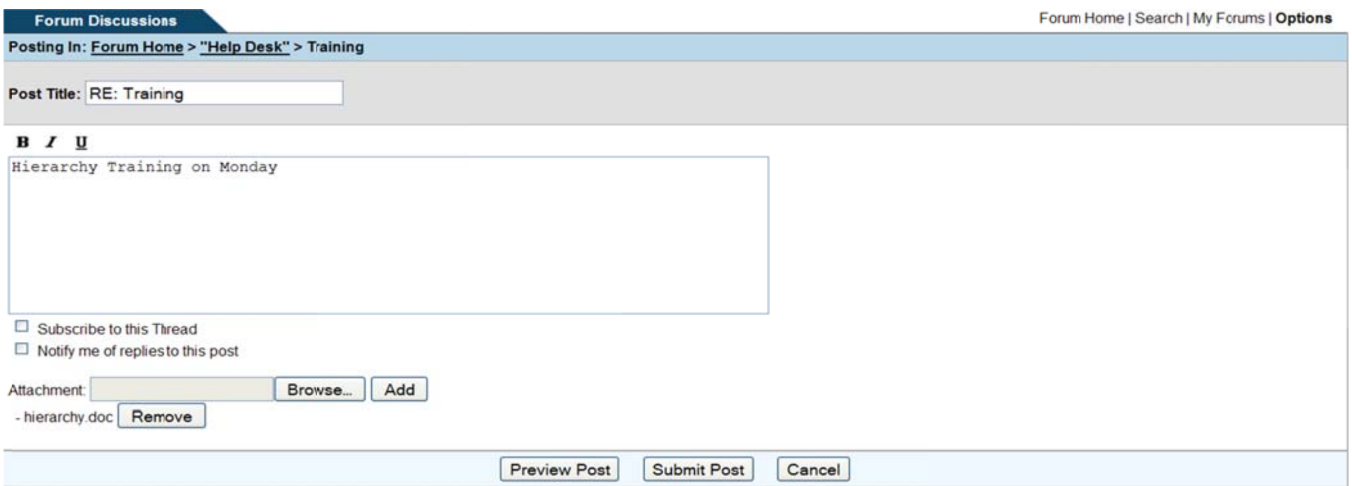


Figure 1.14 – Document Attached

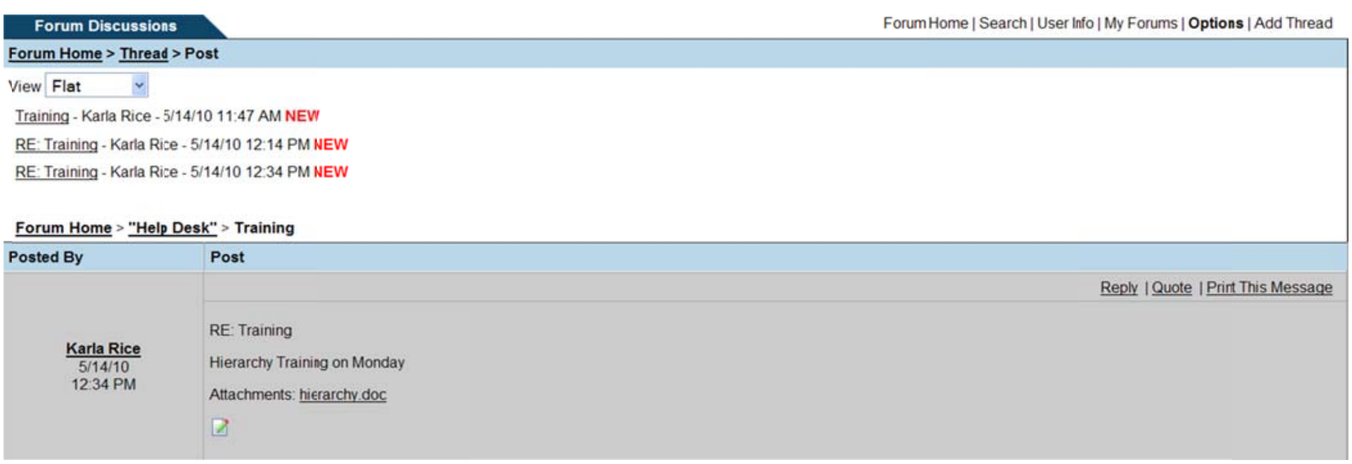


Figure 1.15 – Post with Attachment

Edit/Delete Thread

Only the "Admin" of the forum can edit and/or delete the thread. Once the thread has been deleted, it cannot be retrieved.

Edit Thread

1. Click on the Forum title.
2. Clicking on the icon under the "Edit" column next to a specific thread (see Figure 1.16).
3. Type the modifications in the "Thread Title" and/or "Thread Summary" (see Figure 1.17).
4. Click on the "Update Thread" button.

Delete Thread

1. Click on the Forum title.
2. Click on the icon under the "Delete" column located next to a specific thread (see Figure 1.16).
3. Click on the "OK" button to confirm deletion of a specific thread (see Figure 1.18).

Figure 1.16 – Edit/Delete Thread

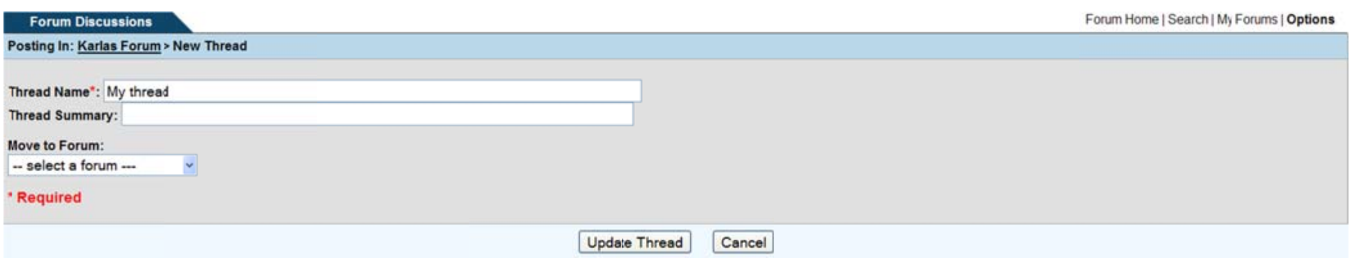


Figure 1.17 – Update Thread

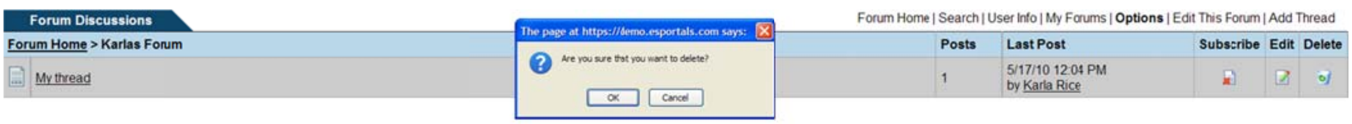


Figure 1.18 – Delete Thread Confirmation

Moving a Thread

The user must be an "Admin" over both the receiving Forum and giving Forum in order to "Move" a thread.

1. Click on the Forum title to "Edit" a specific thread.

2. Click on the icon under the “Edit” column.
3. Click on the drop-down box “Move to Forum” (see Figure 1.18).
4. Click on the desired Forum.
5. Click on the “Update Thread” button.

Posting Messages

Each thread consists of messages. The user with the “Create Threads” and “Post Replies” rights has the option to add a message (Post) to a thread. A “Forum” must have a “Thread” in order for a user to “Post” to it. The user also has the ability to reply with a “Quote,” “Print This Message” and “Add Attachments” to a specific thread. In addition, the “Admin” has the ability to “Move” a “Post” and all associated threaded messages.

Reply /Post

A user that has been granted access to “Create Thread” for a specific forum can add a new post to the thread. The user then, has the ability to reply to existing posts within a thread.

1. Click on the Forum.
2. Click on the name of a specific thread (see Figure 1.16).
3. Click on the “Reply” link (see Figure 1.19).
4. Add body text to the post (see Figure 1.20).
5. Click on the “Preview Post” button (see Figure 1.21).
6. Click on the “Submit Post” button (see Figure 1.21).

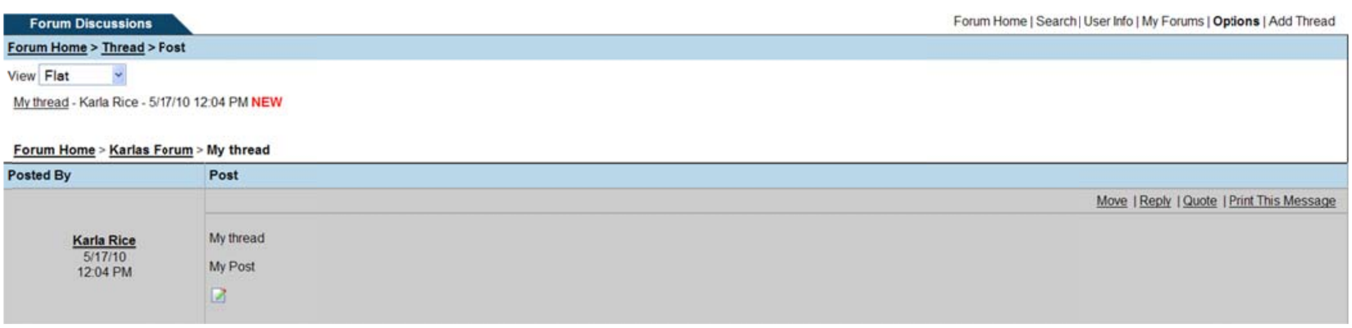


Figure 1.19 – Move/Reply/Quote Thread

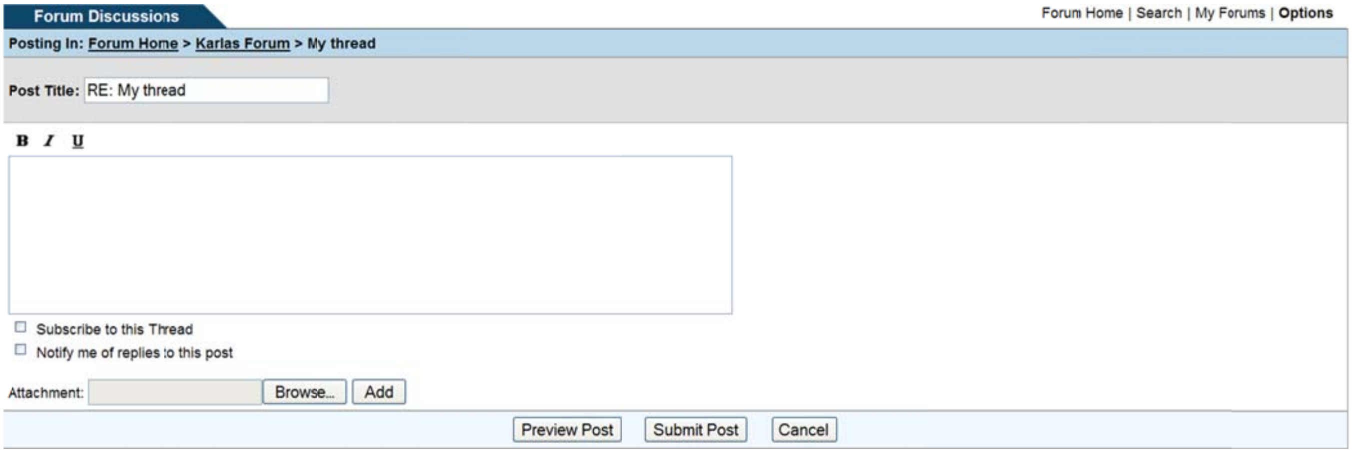


Figure 1.20 – Posting Text

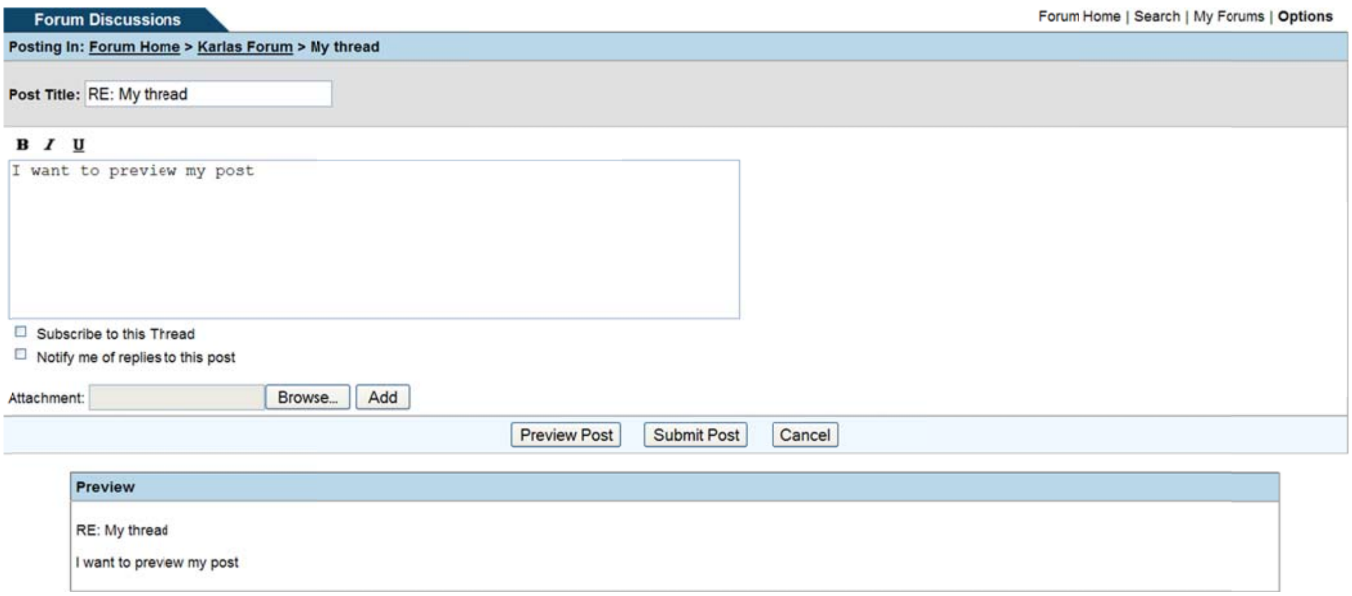


Figure 1.21 - Preview Post

Move Post

A user that has “Admin” rights for a specific forum can add a new post to the thread. The user then, has the ability to “Move Post.”

1. Click on the Forum title.
2. Click on the name of a specific “Thread.”
3. Click on the “Move” link located next to a specific “Post” (see Figure 1.22).
4. Click on the drop-down box to select a target forum (see Figure 1.23).
5. Click on a specific forum name.

6. Click on the drop-down box and select an “existing Thread” (see Figure 1.24).
7. Click on the “Move” button.

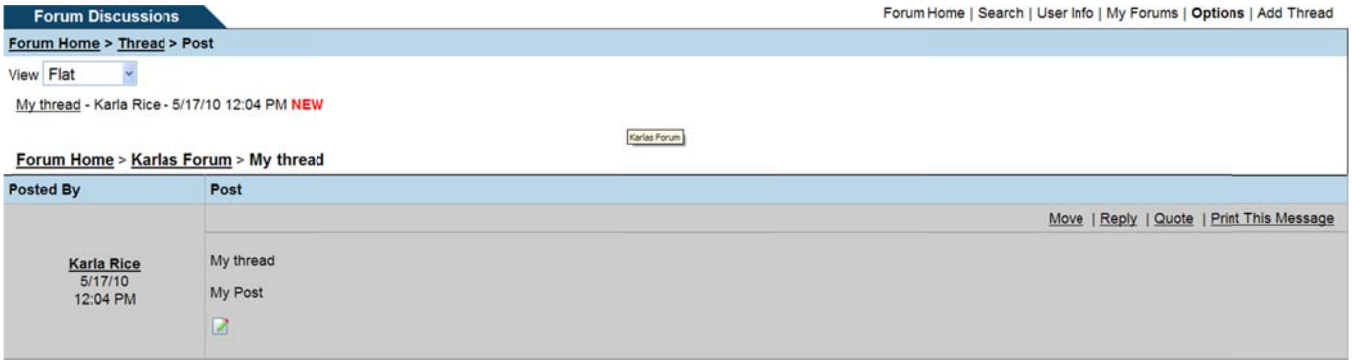


Figure 1.22 – Move/Delete Post

Figure 1.23 – Select Target Forum

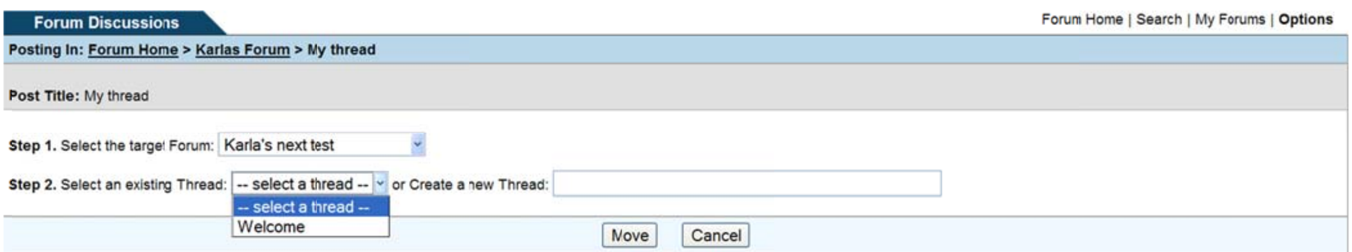


Figure 1.24 – Select Existing Thread

Delete Posts

A user that has been assigned with “Admin” rights has the ability to delete a message that has been posted to a thread. No user can delete or edit a post with replies.

1. Click on the Forum title to a specific thread.
2. Click on the name of a Thread.
3. Click on the  button to delete the post message (see Figure 1.25).
4. Click on the “OK” button to confirm deletion of the Post Message (see Figure 1.25).

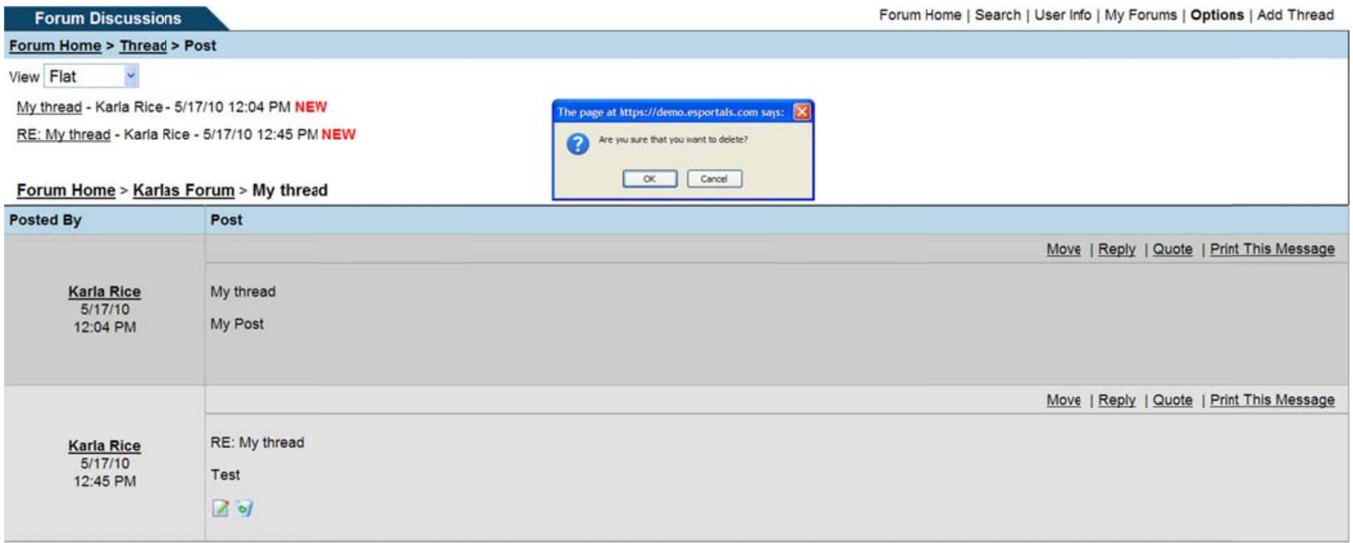


Figure 1.25 – Delete Confirmation

Quote

A user that has been assigned “Post Replies” rights has the ability to “Quote” a specific thread while posting to a thread.

1. Click on the name of a Forum.
2. Click on the name of a specific Thread.
3. Click on the “Quote” link (see Figure 1.25).
4. Click on the “Preview Post” button (see Figure 1.26).
5. Click on the “Submit Post” button.

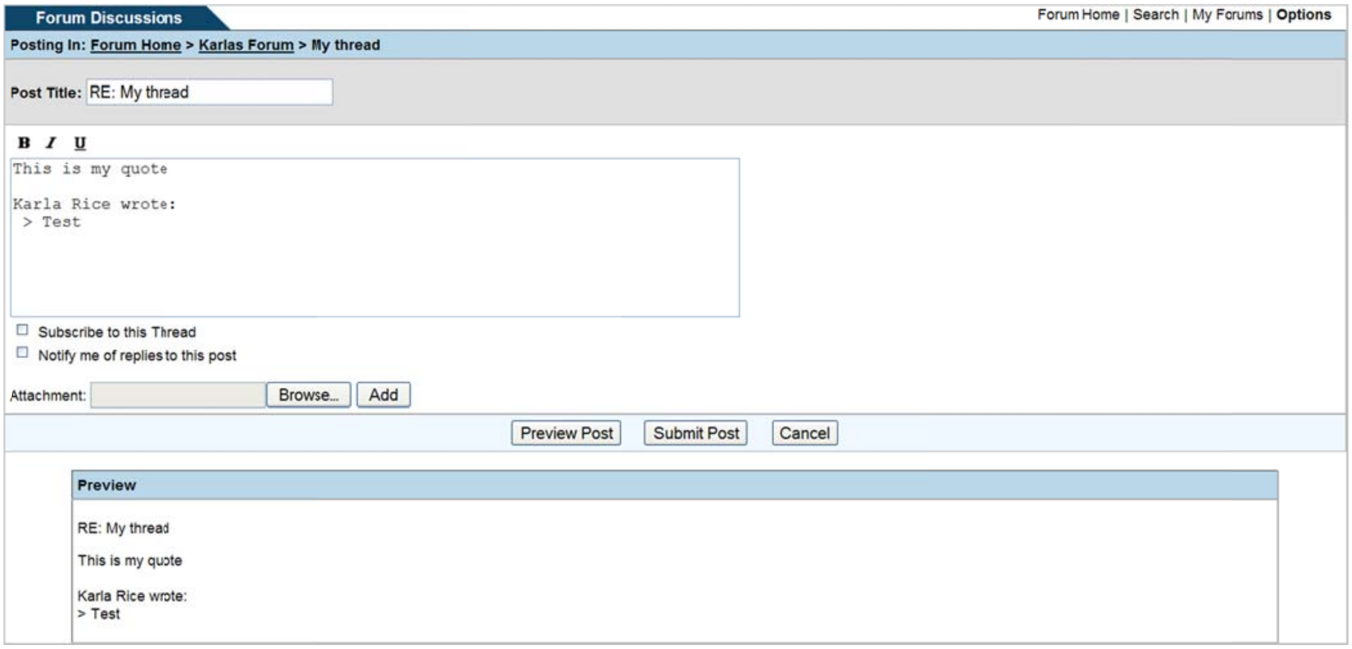


Figure 1.26 – Preview Quote

Print Message

Any user with access to a thread has the ability to “Print” a message.

1. Click on the Forum title.
2. Click on the name of a specific Post.
3. Click on the “Print This Message” link (see Figure 1.27).
4. Click on the “OK” button to confirm the print.

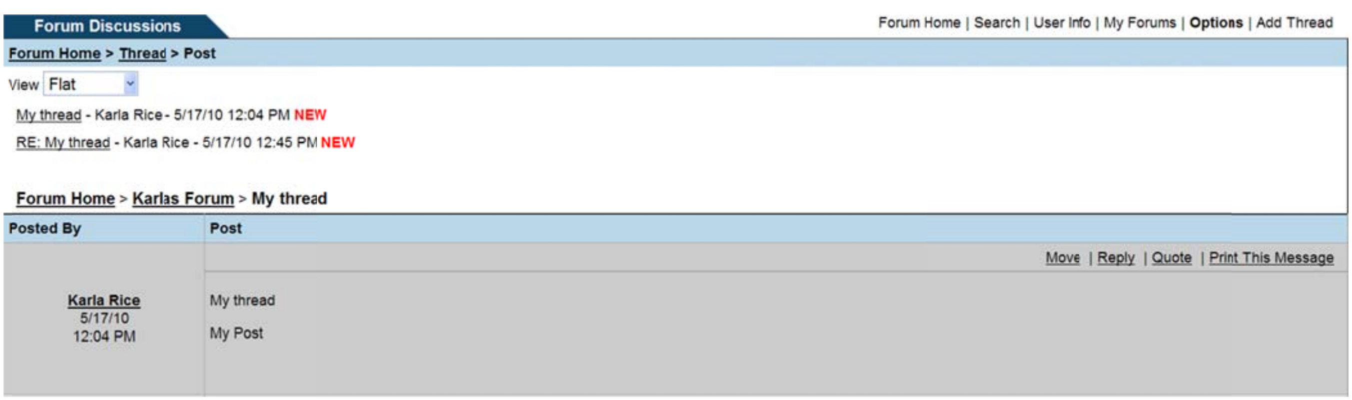


Figure 1.27 – Print This Message

Options

There are two options available for any user to set their preferences to: Notification Options and View Options.

Notification Options

The user has the ability to set the “Notification Options” to either “Notify me of threads created in my subscribed forums,” or “Notify me of posts created in my subscribed threads.” This will generate a notification to the user via external notification.

1. Click on the “Options” link (see Figure 1.1).
2. Click either and/or both “Notification Options” (see Figure 1.28).
3. Click on the “Update Preferences” button (see Figure 1.28).

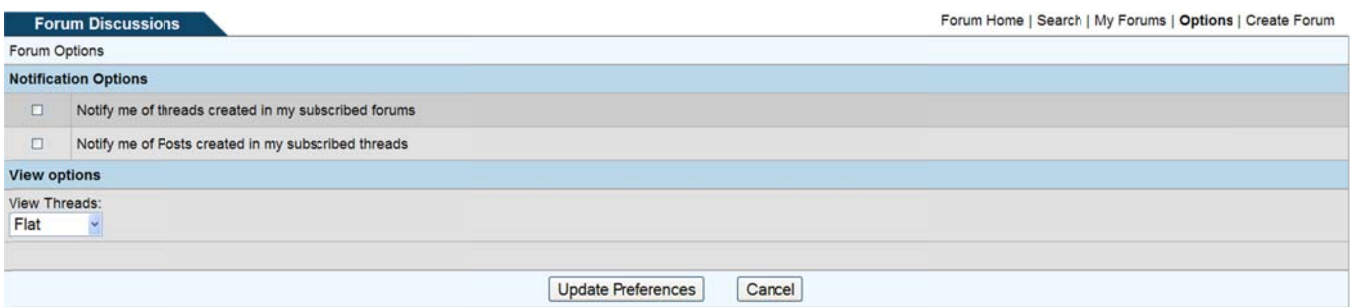


Figure 1.28 - Forum Options

View Options

The user has the ability to set “View Options” to either “Threaded” or “Flat.” The “Threaded” option shows the “Threads” in chronological and reply order. And the “Flat” option shows the “Threads” from first to last in chronological order.

1. Click on the “Options” link (see Figure 1.1).
2. Click the drop-down box under “View Threads” (see Figure 1.28).
3. Highlight the desired “View Threads” option.
4. Click the “Update Preferences” button.

Search

Any user has the ability to “Search” any “Forum” they have been granted access to by: Keyword(s), Title, Title and Text, and number of days.

1. Click on the “Search” link (see Figure 1.29).
2. Type in text for “Keyword(s).”
3. Click on the bullet of either “Title” or “Title and Text.”
4. Click on the drop-down box and select how far back the search should be conducted: 60, 45, 30, 15, or ALL.
5. Highlight the name of a Forum. By default, the system searches ALL forums.
6. Click on the “Search” button.
7. Click on the “GO” link within the desired message (see Figure 1.30). This will take the user directly to the matched thread.

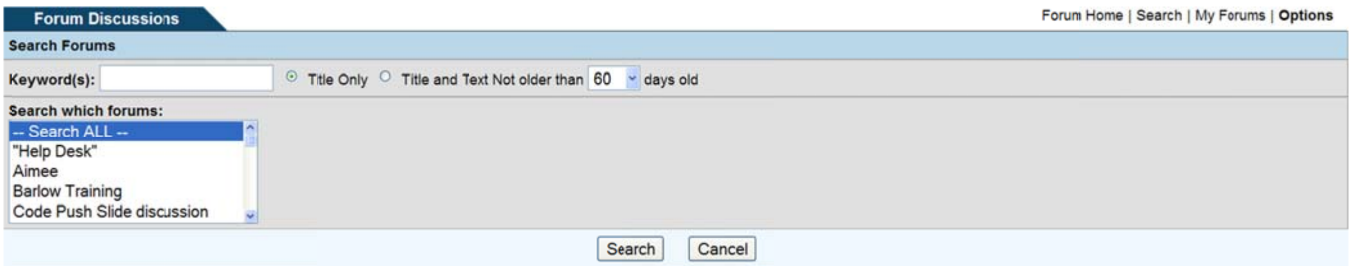


Figure 1.29 – Search Forum

The “go” feature allows the user that has access rights to “Edit,” “Reply,” “Quote,” and “Print Message” to the Forum.

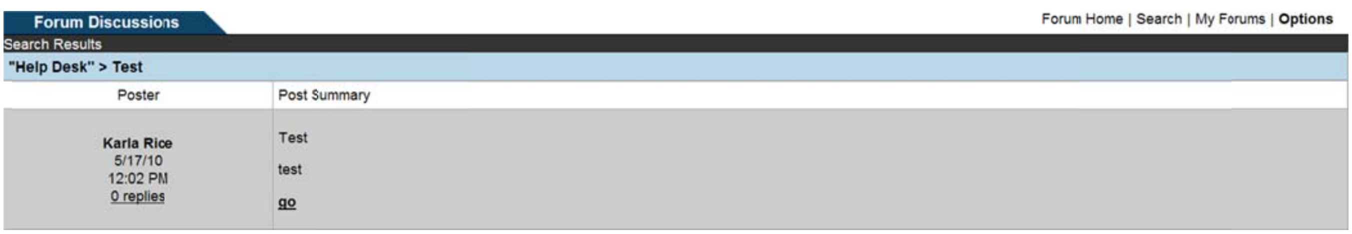


Figure 1.30 – Search Results

Frequently Asked Questions (FAQs)

1. Who can create a new forum discussion?

   Any user can create a forum discussion.

2. Who has access to participate in Forum?

   People that have been granted access by a Forum Admin will have access to participate in a Forum Discussion.

3. What steps do I take to create a new forum?

   Click on the "New Forum" button from the "Forum Main" screen. Fill in the forum name, description, grant users access and rights, and click on the "Finish" button. For more details, refer to Section 3 - Create Forum / Manage Access section.

4. How can I create a thread inside a forum?

   Click on the "New Thread" button above the forum name. Enter in a new thread name and highlight the forum under which the thread will be posted. Click "OK." Refer to Add/Edit Threads section.

5. How do I post a message under a thread?

   Click on the arrow next to the forum. When the forum expands to show the thread names, click on the thread for which you want to post a message. In the right frame, click the "Post new message in this thread" link. Fill out the subject and message boxes and click the "Post" button. Refer to Posting Messages section.

6. How do I delete a forum?

   To delete a forum, click on the "Admin" link from the top portion of the forums page. Click on the "Forum Manager" link. Highlight the Forum name to be deleted and click on the "Remove" button. When prompted to delete the forum, click the "Yes" button. Refer to Section 6- Delete Forum section.

7. Can I delete a thread?

   Yes, click on the thread name under the forum. Select the "Delete" button and click the "Yes" button to perform the deletion. Refer to Delete Thread section.

8. Can I delete a post?

   Once you open the post, there is the option to delete. Refer to Delete Posts

9. How do I edit a thread?

   To edit a thread, find the thread you want to edit. Click on the "Edit" icon. Edit your information and click the "Update Thread" button. Refer to Edit Thread section.

10. How do I add an attachment to a post?

    When posting a message, click on the "Advanced" button. Click on the "Attachments" button. For specific instructions, refer to Adding Attachments section.

11. How do I receive notifications when new messages are posted to a forum discussion?

    To receive notifications, click on the dot next to the thread name so that it turns RED. When the red circle appears next to the thread, you are subscribed to receive notifications. Refer to Notification Options section.

12. How are notifications delivered to me?

Notifications appear in the form of an internal portal mail message and an external notification to your regular desktop mail.

13. Why does the Forum Discussion tab stay red after I've read the posting?

    The tab will stay red to indicate no one has posted message to the forum for up to 7 days.

Section 8 – Groups

The “My Groups” feature is similar to creating an address book or distribution list. Instead of selecting users individually for accessing content, users can be placed in a group listing. My Groups can be used in Secure Messaging, Calendar, Webport, Survey Wizard, Library and Online Briefings.

View Existing Groups

As shown in Figure 1.0, the “My Groups” screen provides options for creating a new group, creating a new Meta Group, returning to the “Secure Messaging” tool, and viewing Groups. Under the heading, “Manage Users In Group”, a listing is displayed of created groups in alphabetical order.

The My Group list shows all groups that the user has created or has access to. Portal Administrators also have a link to “View All Groups” within their hierarchy/visibility.

1. Click on the “Groups” link.
2. The My Groups screen is displayed with a list of all groups (see Figure 1.0).

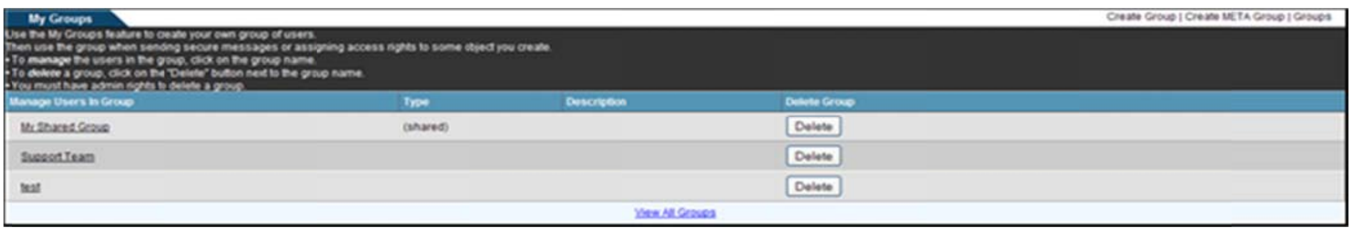


Figure 1.0 – My Groups

Create New Group

The portal provides no limit to the number of groups that a user can create.

1. Click the “Create Group” link (see Figure 1.0).
2. Type in a name of the group (see Figure 1.1).
3. Click the “Create” button.
4. To cancel and return to the “My Groups” screen, click on the “Cancel” button.

Figure 1.1 - Create Group

Assign Group Members

Once the group is created, a screen is displayed for granting users access. All users that are granted access to the group must have visibility over each other. If they do not, then a "Compartment Constraint" message is displayed.

1. Verify that the Group Name is correct. Make any desired changes (see Figure 1.2).
2. Provide a group Description (not required).
3. Type the first or last name of a user, group name or organization name in the "Search" field.
4. Click on the "Search" button. The "Users Not In Group" list is updated with the users that meet the search criteria and reside in the originator's visibility/hierarchy.
5. Highlight the desired user(s).
6. Select the  button to move the user(s) into the "Users In List" field. To remove a user's name from the "User's In List" field, select the  button and the user is returned to the "Users Not In Group" field.
7. Click on the "Finished" or "Update Group Membership" button.
8. Click on the "Cancel" button to cancel the action and return to the "My Groups" screen.

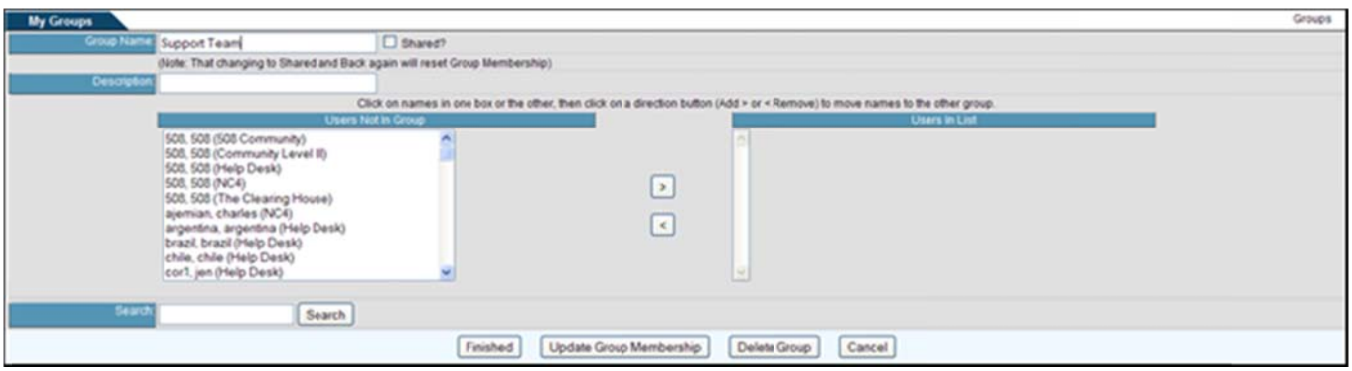


Figure 1.2 – Manage Access

Create Shared Groups

The My Groups tool provides an option called "Shared" Groups, which allows users to create a group that the members can also use. This feature must be enabled on the portal by a Portal Administrator. By default, only administrators have the ability to create shared groups, but SAs can adjust a Preference Setting so that all users have the ability to create shared groups.

1. Click the "Create Group" link (see Figure 1.0).
2. Type in a name of the group (see Figure 1.3).
3. Select the checkbox next to the question, "Will this Group be shared with other Portal Members?"
4. Click the "Create" button.
5. To cancel and return to the "My Groups" screen, click on the "Cancel" button.

Figure 1.3 – Create Shared Group

Assign Shared Group Members

All users that are granted access to the group must have visibility over each other. If they do not, then a “Compartment Constraint” message is displayed. The owner of a Shared Group has the ability to assign the member different roles within the group. These three roles are:

- Admin: those users with Admin rights have the ability to utilize the group in their collaboration, receive access from other group members, and manage user access to the group.
- Member/User: those users with Member/User rights have the ability to utilize the group in their collaboration and receive access from other group members
- User Only: those users with User Only rights can only use the group for “Sending” purposes. They do not receive access from other members of the group.

Important Note: Rights assigned to Shared Group Members will not apply in the Library.

Assigning Shared Groups

6. Verify that the Shared Group Name is correct. Make any desired changes (see Figure 1.4).
7. Provide a group Description (not required).
8. Type the first or last name of a user, group name or organization name in the “Search” field.
9. Click on the “Search” button. The “Users Not In Group” list is updated with the users that meet the search criteria and reside in the originator’s visibility/hierarchy.
10. Highlight the desired user(s).
11. Select the checkbox corresponding with the role that the highlighted user should have within the group.
12. Select the button to move the user(s) into the “Users In List” field. To remove a user’s name from the “User’s In List” field, select the button and the user is returned to the “Users Not In Group” field.
13. Click on the “Finished” or “Update Group Membership” button.
14. Click on the “Cancel” button to cancel the action and return to the “My Groups” screen.

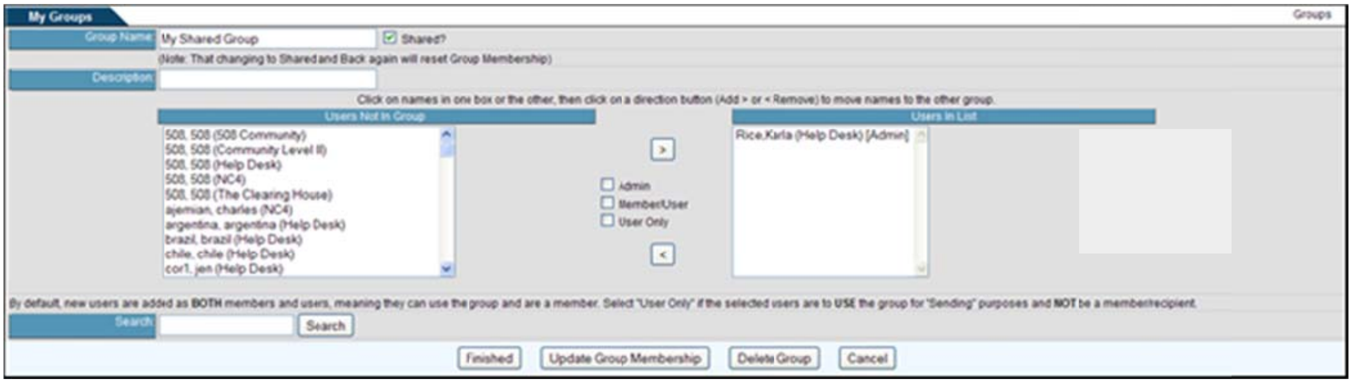


Figure 1.4 – Assign Shared Group Membership

Edit Groups

Group admins have the ability to edit the group after it has been created. They can grant/deny access, change the name and/or description, and enable/disable the shared feature.

1. Click on the linked name of the Group to be edited (see Figure 1.0).
2. Make any necessary adjustments to the existing membership or name/description fields (see Figure 1.4).
3. Click on the “Finished” or “Update Group Membership” button when finished.

Delete Groups

Group admins have the ability to delete a group. Once deleted, the group cannot be retrieved.

1. View the My Groups list (see Figure 1.0).
2. Click on the corresponding “Delete” button.
3. Click on the “Ok” button to confirm deletion. Click on the “Cancel” button to cancel the deletion request.

OR:

1. View the My Groups list (see Figure 1.0).
2. Click on the linked name of the Group to be deleted.
3. Click on the “Delete Group” button (see Figure 1.4).
4. Click on the “Ok” button to confirm deletion. Click on the “Cancel” button to cancel the deletion request.

Create Meta Groups

Meta Groups have a dynamic membership based on the Users Meta Data search parameters that are set up by the group admin. Meta Groups can be created by all users when the “Meta Data” capability is enabled by the System Administrator. Users can only create a Meta Group based on the specific Meta Tags that they have been given “Read” or “Write” access by an admin.

Based on the search parameters, the group’s membership updates automatically as users’ Meta Data is updated to match the search criteria. The group membership is populated by those users who have been assigned to the Meta Tag and meet the specific “Search Value”. Users with no visibility to each other can belong to the same Meta Group, but the visibility rules are applied when one user selects to “send” to the Meta Group.

Shared Meta Groups have the same behavior as regular Shared Groups. The “shared” functionality must be enabled by a System Administrator. By default, only administrators have the ability to create Shared Meta Groups, but all users can be given the capability through the admin Preference Settings. There are no distinguishing roles within Shared Meta Groups.

1. Click the “Create META Group” link (see Figure 1.0).
2. Type in a name of the meta group (see Figure 1.5).
3. To make the group shared, select the checkbox next to the question “Will this Group be public and used by other Portal Members?”
4. Click on the “Create” button.
5. Click on the “Cancel” button to return to the Groups listing.
6. Verify that the Meta Group Name is correct. Make any desired changes (see Figure 1.6).
7. Provide a group Description (not required).
8. Select a Tag from the dropdown box (see Figure 1.6).
9. Click on the  button.
10. Enter the search value into the provide area (text area, checkboxes, radio buttons, etc.) (see Figure 1.7).
11. Select the order if more than one Meta Tag has been selected for this group.
12. Select “And” or “Or” if more than one Meta Tag has been selected for this group.
13. Click on the  button to save the Meta Tag to the group’s search parameters.
14. The Meta Group membership list displays under the “Mail Group Members” header. These users are those who have been assigned to the particular Meta Tag (see Figure 1.7).
15. Click on the “Finished” or “Update Group” button when finished.

Figure 1.5 – Create Meta Groups

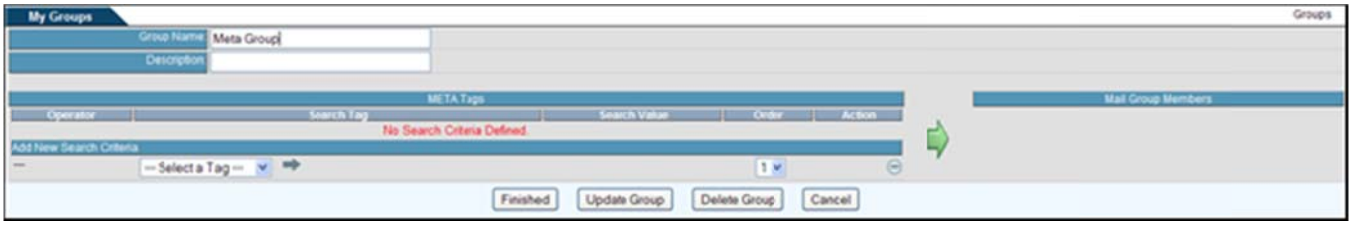


Figure 1.6 – Assign Parameters

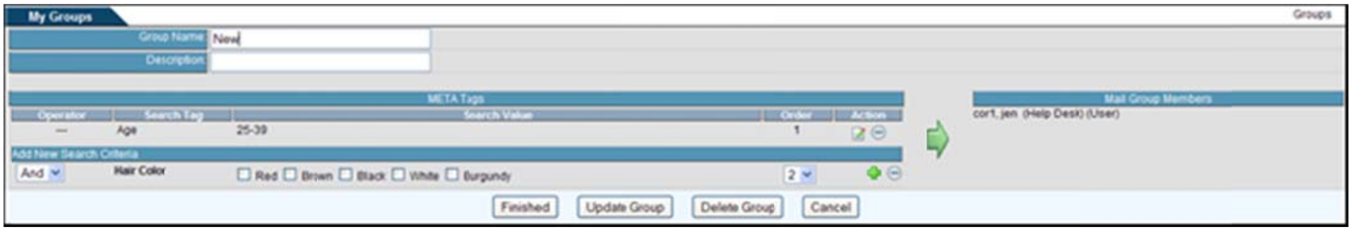


Figure 1.7 – View Meta Group Membership

Edit Meta Groups

Group admins have the ability to edit the group after it has been created. They can grant/deny access, change the name and/or description, and enable/disable the shared feature.

1. Click on the linked name of the Group to be edited (see Figure 1.0).
2. Make any necessary adjustments to the name and/or description field (see Figure 1.7).
3. Click on the  button to edit the search value of the Tag (see Figure 1.7).
4. Click on the  button to remove the Tag from the search parameters (see Figure 1.7).

Delete Meta Groups

Group admins have the ability to delete a group. Once deleted, the group cannot be retrieved.

1. View the My Groups list (see Figure 1.0).
2. Click on the corresponding "Delete" button.

OR:

1. View the My Groups list (see Figure 1.0).
2. Click on the linked name of the Group to be deleted.
3. Click on the "Delete Group" button (see Figure 1.7).

Frequently Asked Questions (FAQs)

1. What is the purpose of Groups?

   Groups are customized lists of users similar to address books in a desktop email program. Groups are used when sending secure mail and when giving access to calendar postings, library categories and online briefings. Instead of having to hunt for users individually every time you want to give access to your content, you can create a group. Refer to View Existing Groups for details.

2. Where are Groups used within the portal?

   Groups are used within Secure Messaging, Calendar, Library and Online Briefings.

3. How do I create a Group?

   Refer to Create New Group for details.

4. What are shared groups?

   Shared Groups are those that are made available to the members for use even though they did not create the group. The users can select the group to send a secure message or give access to a library category/document, online briefing or calendar event.

5. Can I edit the groups I created?

   Yes. Click on the "My Groups" link on your Home page or click on the "My Groups" link within the Secure Messaging tool. Click on your group name. Edit the information and click the "Finished" button to save your changes.

6. How do I delete a Group?

   After selecting the "My Groups" link from your Home page or within Secure Messaging, click on the "Delete" button next to the group name.

7. When Groups are deleted, is there any way to retrieve them?

   No.

8. What is a Meta Group?

   A Meta Group is a group where the users are linked by a common value on specific User Meta Tags.

9. Do I need to update the group membership for a Meta Group?

   No. The membership for a Meta Group is dynamic. As users' Meta Data are updated, they are automatically added to the Meta Group if the Meta Data value matches the search parameters of the group.

Section 9 – Library

The core tool, Library, is an area for documents to be stored for future reference. The Library is divided into two main categories: Public and Private. Users with Site or Community Administrator rights create the "Public" categories. Documents submitted to this category are seen by every user on the portal regardless of organizational hierarchy. A user that creates a "Private" category becomes the category owner. Documents within this category are restricted only to those users granted access by the owner. Community Administrators can view the "Private" category name and owner, but not the documents unless granted access. The terms category and folder are equivalent and used throughout this section.

As shown in Figure 1.0, library categories appear on the left hand side of the "Library" screen. Public categories are listed under the "Public Library Categories" heading. Private categories, created by users, are listed under the "Private Library Categories" heading. Users can only see the categories they have been granted access. Categories may also contain subcategories.

Another feature of the Library tool is document management, which provides a means for users to upload and download documents, perform searches, and modify and/or delete documents in multiple categories simultaneously.

To access the Library tool, select the "Library" link from the Home page, under the Collaboration Tools menu or from the navigation bar.

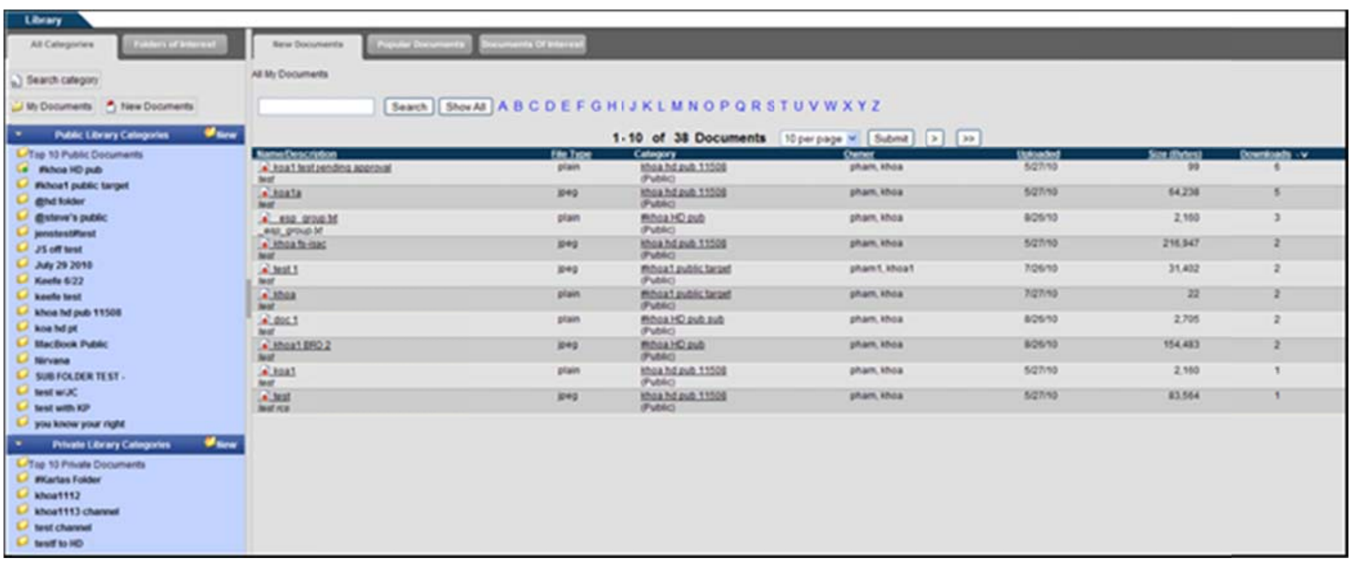


Figure 1.0 – Library Main

All Categories

The "All Categories" tab is located on the left hand side of the Library screen. This area allows you to search categories, access personal documents, view new documents, access public and private document categories. Site and community administrators will also see an orphaned content link, if there is any content that no longer has an administrator.

Search Categories

The “Search Categories” tool allows you to search for documents within any of the categories. To search fill in as much information as you have on the document. The search will filter through all file names, owner’s names, document titles and document descriptions. It is not case sensitive and partial strings are allowed. The more specific the information, the fewer the number of results returned.

Search

1. Click on the “Search Categories” link.
2. Type in the file name, document title, description, or author’s name and click on the “Search” button. To clear the information, click on the “Clear” button (see Figure 1.1).
3. The documents that match the search criteria appear by document title, category name, owner and date the document was uploaded.
4. To perform another search, click on the “New Search” button (see Figure 1.2).

Figure 1.1 - Library Search

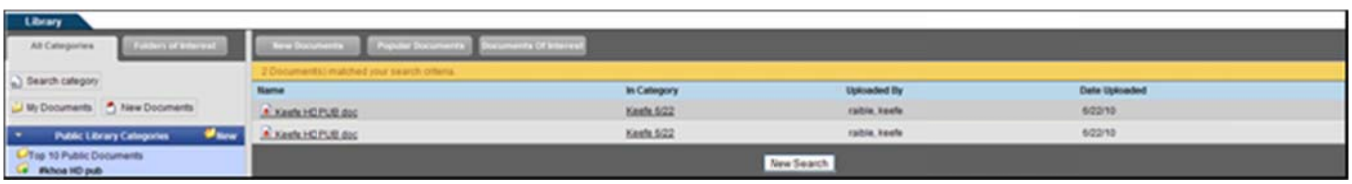


Figure 1.2 - Search Results

My Documents

Shows all documents you are able to access. You are able to search specific documents, search by first letter (A-Z) of name or description, change the number of results that can be viewed on each page (max 50) and move ahead/back to view results on other pages.

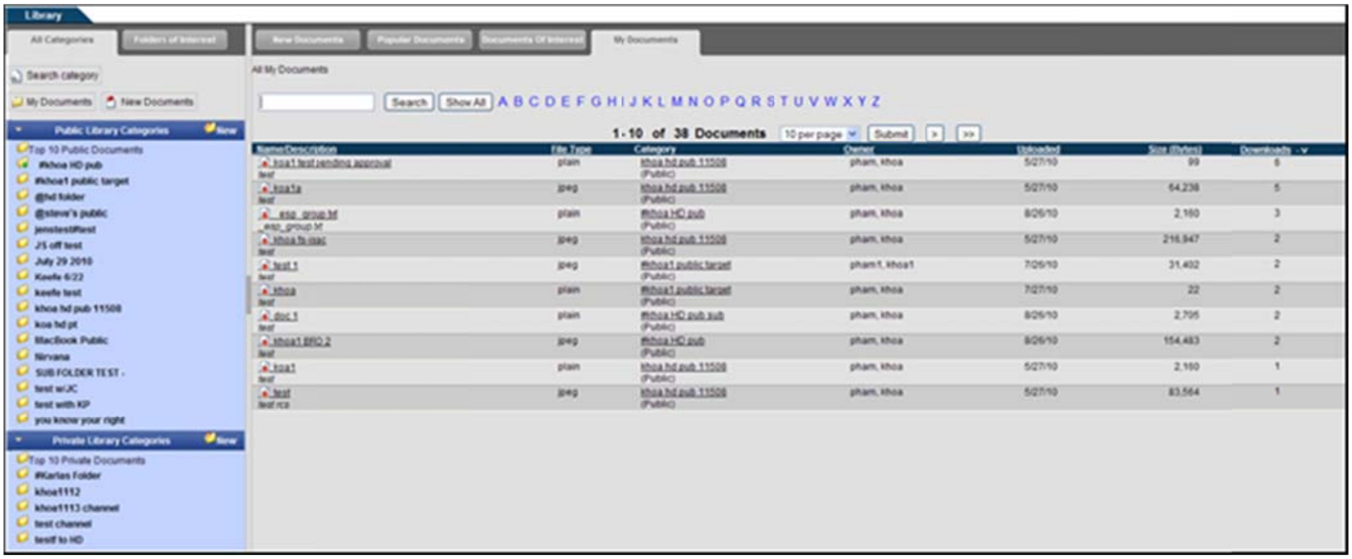


Figure 1.3 – My Documents

Search All My Documents

1. Click the "My Documents" button, on the left hand frame of the library screen. (see Figure 1.3).
2. A list of documents is shown by name, file type, category, owner, upload date, file size, and number of downloads.
3. To increase the number of documents displayed, use the drop down arrow and select the appropriate number per page.
4. Click on the "Submit" button and the search results are shown.

New Documents

This area displays documents that you have not downloaded and have been posted within the last week (see Figure 1.4). Refer to Section 4 – New Documents for additional information.

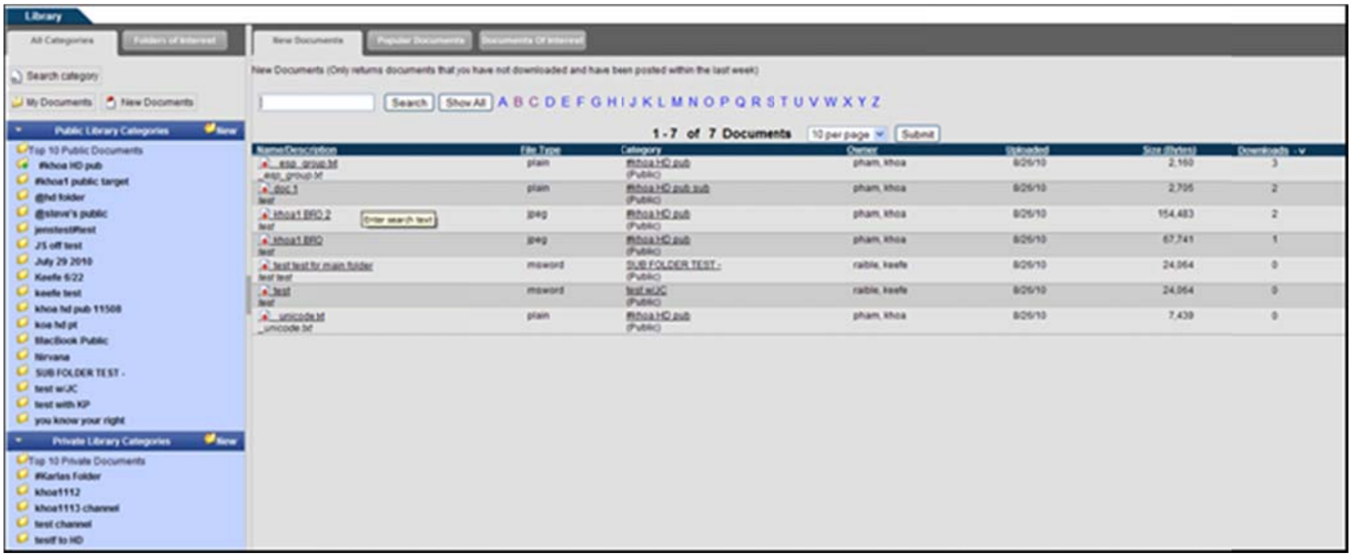


Figure 1.4 – New Documents

Public Library Categories

Top 10 Public Documents

This area shows the ten most downloaded public documents in the library, in order from highest to lowest (see Figure 1.5). To access the top 10 public documents, click the link under the Public Library Categories heading, on the left hand side of the library.

Figure 1.5 – Top 10

View/Download Documents

To view/download documents under a category or subcategory:

1. Click on the category name. Documents are alphabetically listed by name/description, file type, category, owner, date uploaded, size, and number of downloads (see Figure 1.6).
2. Click the document name.

3. Options to open or save the file are displayed.
4. Select the “save” option and the file is downloaded to the specified directory location. Select the “open” option and the file is displayed without saving the file. Each time the file is downloaded, the number increases under the “Download” column. Category owners can click on the “View History” link to view the users, their employers, the time of the last download and number of times downloaded (see Figure 17).
5. View documents within a subcategory by clicking on the subcategory name and then document title.

Figure 1.6 – View Category

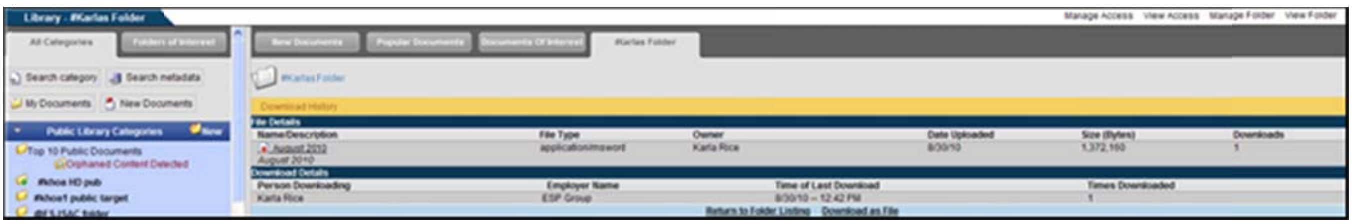


Figure 1.7 - View History

Delete Documents

Once a document is deleted, it cannot be retrieved.

1. Click on the “Delete” button next to the document name.
2. A confirmation screen is displayed (see Figure 1.8).
3. Click on the “Delete” button to delete the document.
4. Click on the “Do Not Delete” button to cancel the action and return to the previous screen.

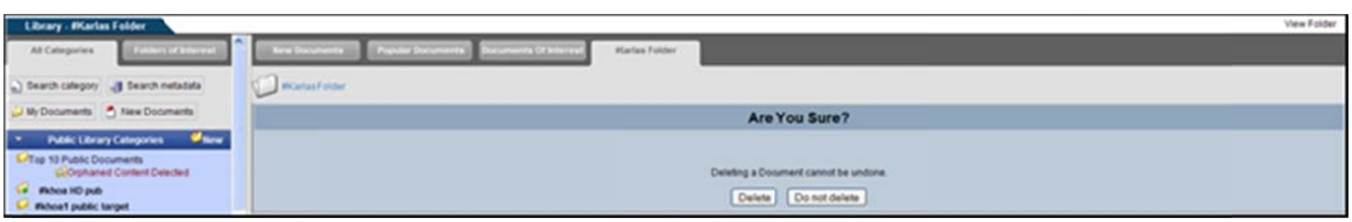


Figure 1.8 - Confirmation Screen

Create New Category

Only Site Administrators and Community Administrators can create new public library categories.

1. Click on the “New” link (see Figure 1.0).
2. If the CA or SA manages more than one community or a community with sub-organizations, the user must first choose which community to create the public library category in (see Figure 1.9).
3. Type in the name of the category (see Figure 1.10).
4. Click on the “Create” button. Click on the “Cancel” button to return to the main library.
5. Once a category is created, the category folder is displayed in the right-hand “Library” frame. It is also listed alphabetically under the appropriate library category heading (i.e., Public or Private)(see Figure 1.11).

Figure 1.9 – Select Organization

Figure 1.10 - Create a Category Name

Figure 1.11 – View Public Category

If the user fails to enter a name for the category and selects the “Create” button, an error message is displayed.

You must enter a name for the category before proceeding.

Create Sub-Folder

Only Site Administrators and Community Administrators can create sub-folders for public library categories.

1. Click on the “Create Sub-Folder” link (see Figure 1.11).

2. Type the name of the sub-folder (see Figure 1.12).
3. Click on the "Create Folder" button.
4. Confirmation that the Sub-Folder was created (see Figure 1.13).

Figure 1.12 – Create Sub-Folder

Figure 1.13 – Sub-Folder Created

Add to FOI

This link is used to add specific folders to Folders of Interest (FOI), so that they can be easily accessed in the future. For more information, refer to Section 3 – Folders of Interest.

Upload Document

All users who have access to the category can upload documents into that category. Once the document has been uploaded, the owner must approve the document before it can become visible.

1. Click on the category name from the main Library.
2. Click on the "Upload Document" link (see Figure 1.13).
3. Type in the title and a description in the "Upload Document" screen (see Figure 1.14).
4. Click on the "Browse" button to select a file.
5. Click on the "Upload" button and then the "Finished" button. A message is displayed stating the document was successfully uploaded into the library.

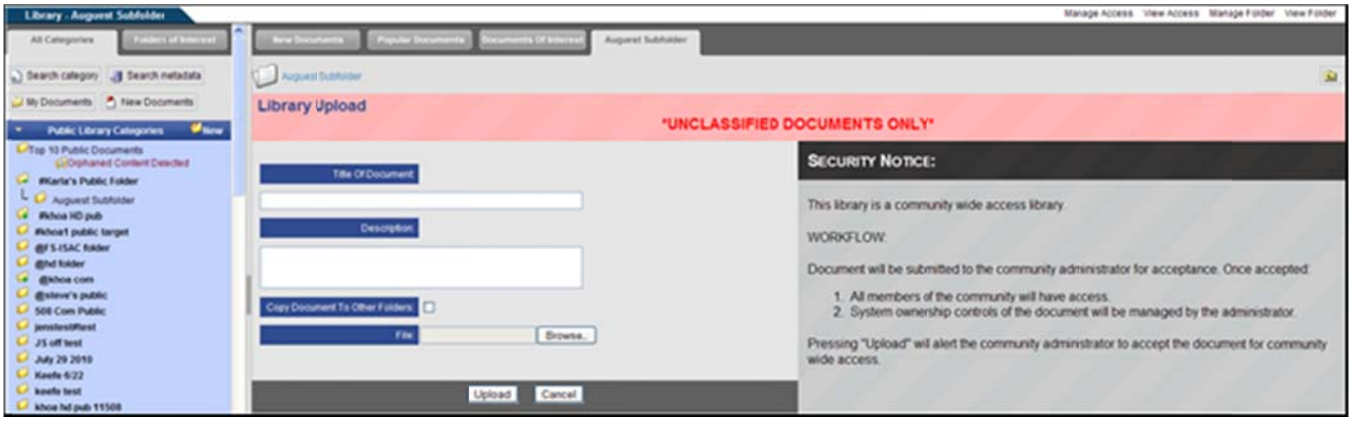


Figure 1.14 - Upload Document to Public Category

Copy Document to Other Folders

The Content Manager right allows all administrators (Site Administrators, Community Administrators and Organizational Administrators) or users with this assigned right to copy documents (other than RCS documents) into multiple folders when they upload a document into a public or private folder. The document may be copied into multiple folders and across multiple compartments at one time.

1. Click the Upload Document link.
2. Fill in the Title and Description of the document (see Figure 1.14).
3. Select the “Copy Document to Other Folders” checkbox and the list of folders that can be selected, will be displayed below it.
4. Highlight the folder or hold “Ctrl” button to select more than one folder.
5. Click on the “Browse” button to select a file.
6. Select the “No” radio box next to RCS because you may not copy RCS documents into other folders.
7. Check the box, “Send Notifications,” to send a notification to all users who have access to the library categories (optional). The “Send Notifications” box may not be visible to users. If this is the case, then the portal is set up so that notifications are always sent to the users who have access whenever a file is uploaded.
8. Click on the “Upload” button and then the “Finished” button. A message is displayed stating the document was successfully uploaded into the library.

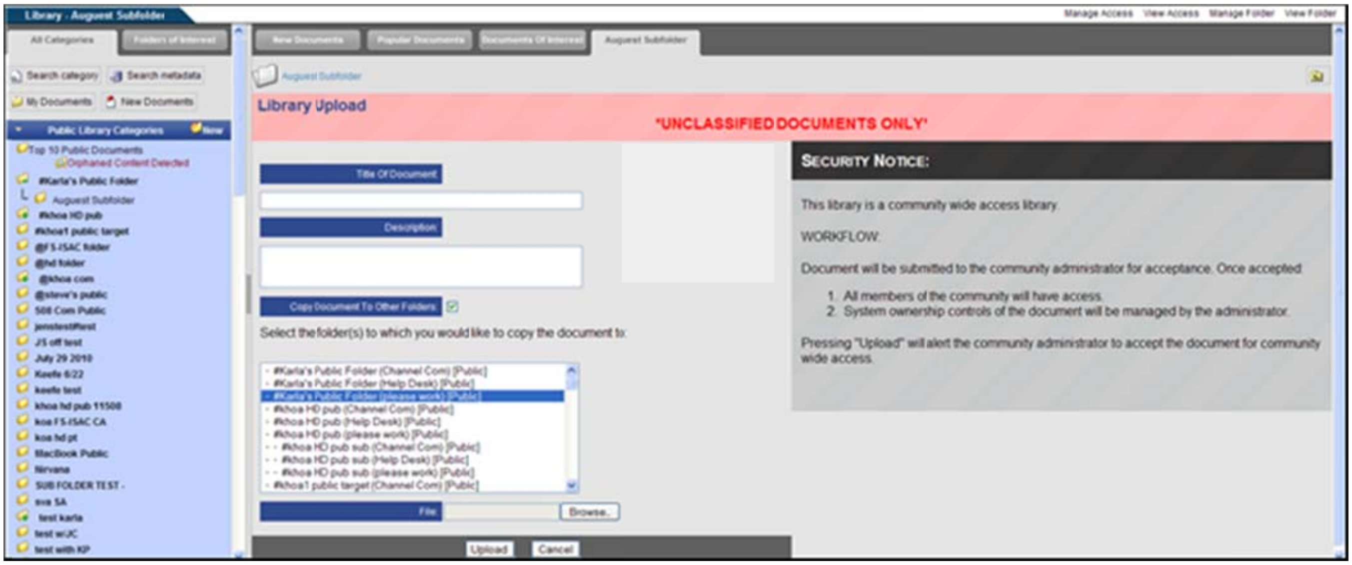


Figure 1.15 – Copy to Other Folders

Approval of Uploaded Document in Public Category

If a user uploads a document into a public category, then the owner of that category (CAs and SAs only) must approve the document before it will be available to users to download. When the owner of the category enters the Library tool, he or she will see the words, "Approvals Pending" (see Figure 1.16). Additionally, the name of the document will be replaced with the link, "Acceptance Pending."

1. Click on either the "You Have Approvals Pending" or "Acceptance Pending" link.
2. Select the radio box "Accept," "Deny," or "Ignore" (see Figure 1.17). If the "Ignore" option is chosen, the document remains pending until the admin approves or denies it.
3. Click on the "Send Notification" checkbox if you would like to send a notification to the user who uploaded the document, informing them whether the document was accepted or denied.
4. Click on the "Process Selection(s)" button. A confirmation screen is displayed (see Figure 1.18).

Figure 1.16 – Approvals Pending

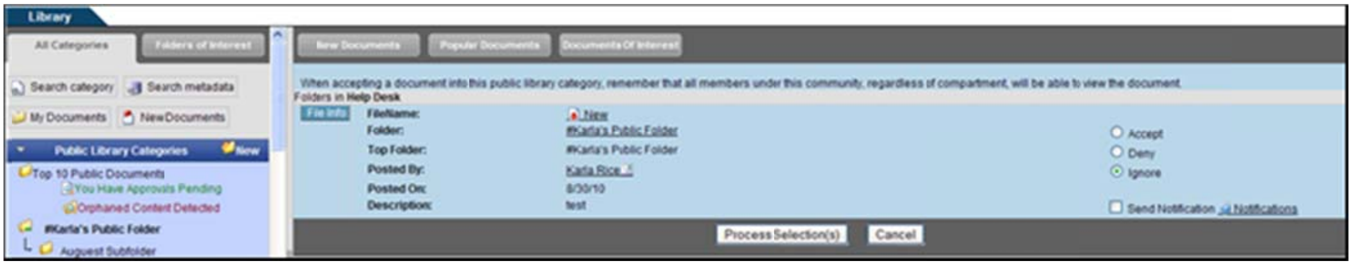


Figure 1.17 – Accept/Deny Uploaded Document

Figure 1.18 – Confirmation of Approval/Denial

After the owner of the public category approves or denies the document and checks the “Send Notification” box, the user who uploaded the document will receive an external notification, informing him of the approval or denial (see Figure 1.19 and 1.20).

Figure 1.19 – Approval Notification

Figure 1.20 – Denial Notification

Bulk Upload

Bulk Upload allows a user to upload multiple files at one time into the Library. A single file cannot exceed 4 MB, and the entire bulk load cannot exceed 30 MB. The right to bulk upload is restricted to SAs, CAs and assigned users with this right. The bulk uploading process is limited to uploading into one folder at a time. The "Name" and "Description" is set to the client file name by the portal. (***NOTE: The Bulk Upload feature only works with Internet Explorer and Flash Player 8 or above. This feature is not enabled on all portals).

1. Click on the "Bulk Upload" link (see Figure 1.13).
2. Click on the "Browse" button (see Figure 1.21).
3. Select which files to upload. To select multiple files, hold the "Shift" or "Ctrl" key down while making selections (see Figure 1.22).
4. Click on the "Open" button to add the file to the list to be uploaded.
5. To remove a file before uploading, highlight the file and click on the "Remove" button.
6. Click the "Reset" button to remove all files.
7. Check the box, "Send Notifications," to send a notification to all users who have access to the library categories (optional).
8. When finished selecting the files, click on the "Upload" button.
9. When the system is finished uploading the files, text below the file box indicates whether the file upload was successful or not (see Figure 1.23).
10. Click on the "View Folder" link to return to the folder and view the documents currently in the selected folder.

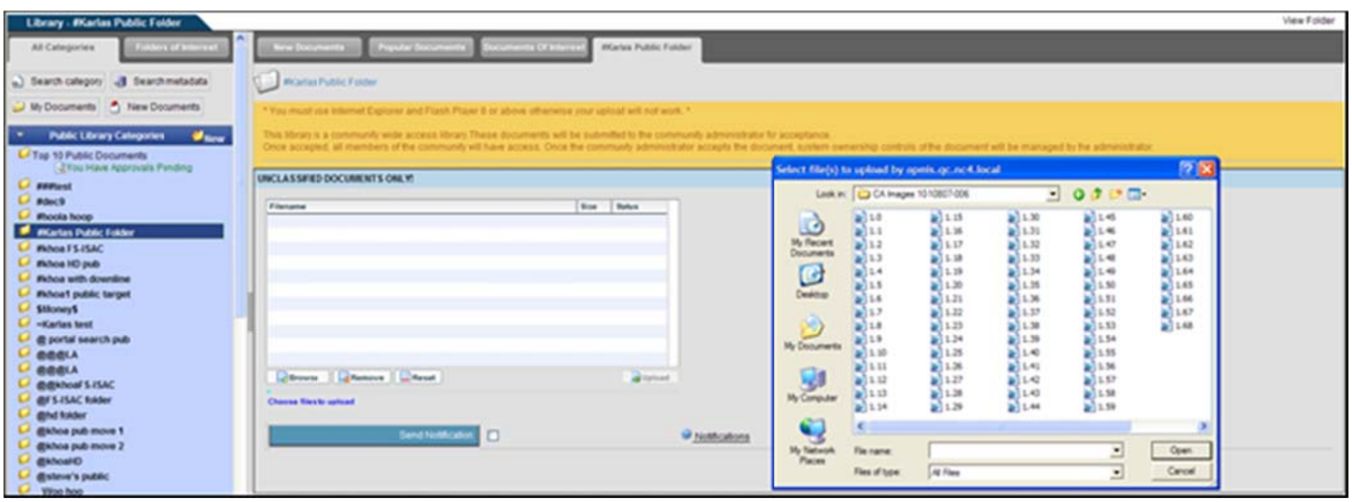


Figure 1.21 – Browse Documents for Upload

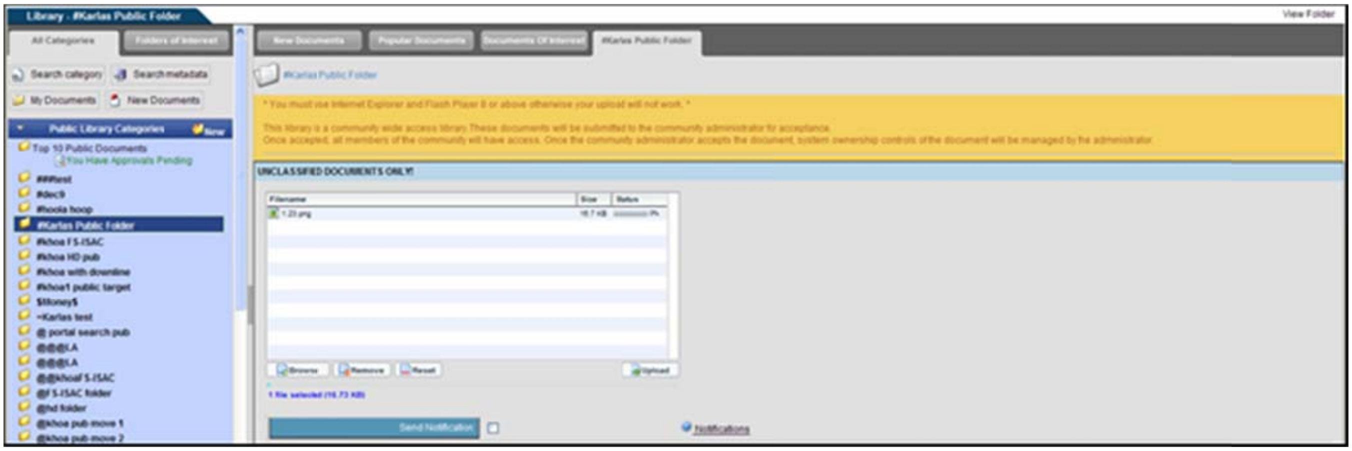


Figure 1.22 – Selected Files for Upload

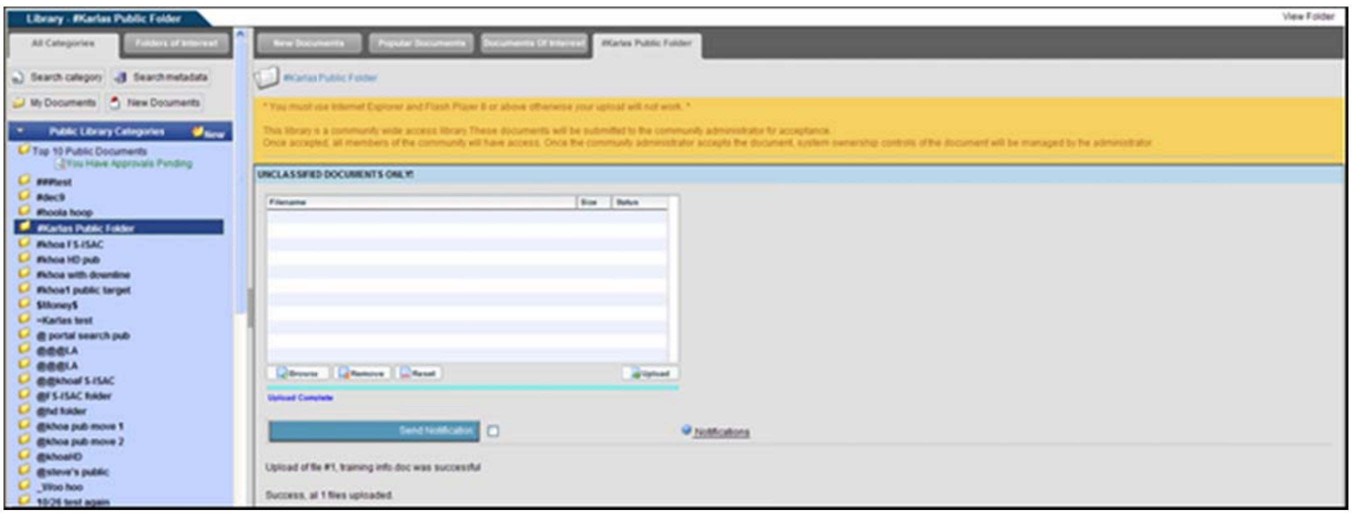


Figure 1.23 – Bulk Upload Completed

Manage Access

Manage access allows Site Administrators and Community Administrators to add/remove other Admins from categories. SAs may only add other SAs and CAs. CAs may only add other CAs.

To grant admin access to the category:

1. Click on the category from the left-hand frame.
2. When the category is displayed, click on the "Manage Access" link in the upper right-hand corner.
3. Type in the name of a user in the "Search" field (see Figure 1.24).
4. Highlight the appropriate user name.
5. Click on the "Include Subs?" check box if the user should have access to all sub-folders created below the parent folder.

6. Select the bullet next to "Admin."
7. Click on the > button to grant the access. Highlight a user's name and select the < button to move a user back to the "Available Users" list to revoke access.
8. Click on the "Update Category" button and then click on the "Finished" button.
9. Select the "Cancel" button to return to the Library.

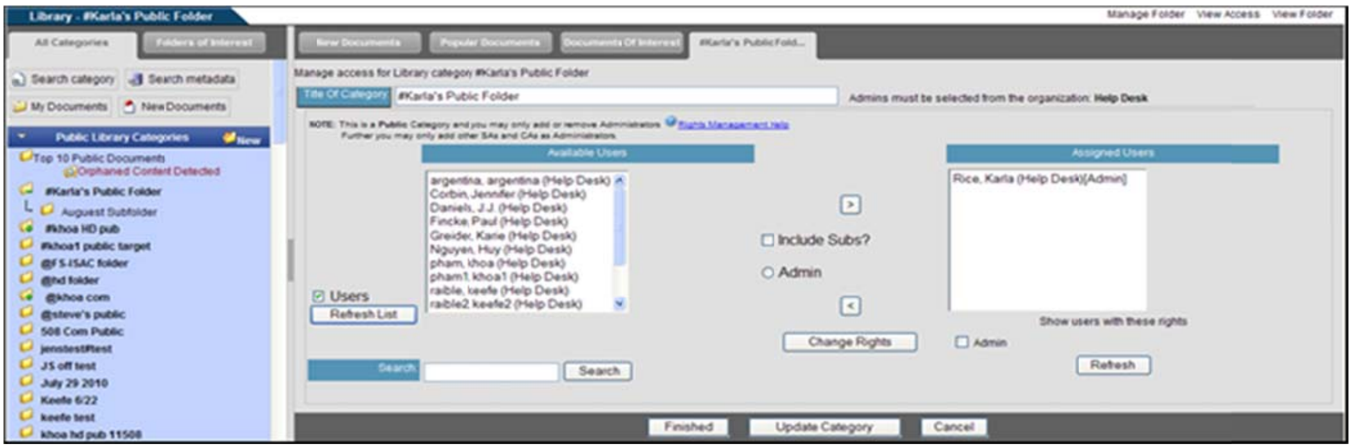


Figure 1.24 – Manage Access

To select multiple user names in a row, hold the shift key and highlight the names, select the user right, and click on the ">" button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names, select the user right, and click on the ">" button. The user names are moved to the "Users in Category" field.

View Access

This area will display administrators and organizations that have access to that category. Admins will be listed at the top in alphabetical order. The organizations will be listed in alphabetical order below the list of admins.

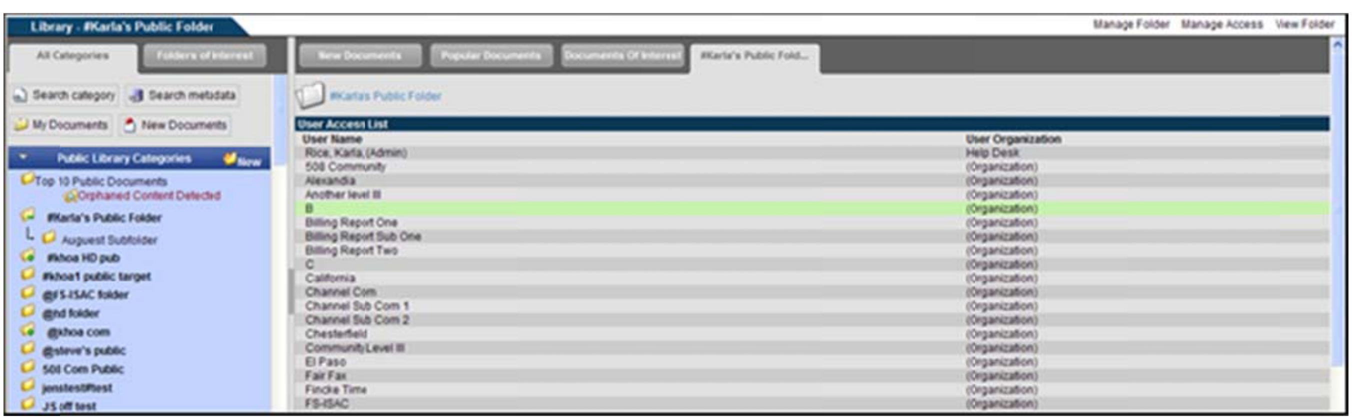


Figure 1.25 – View Access

Manage Folder

The Manage Folder link allows the user to move, copy and delete a folder. The folder Admin has the ability to move and copy the folders, as well as add multiple Administrators to a folder for both “Public” and “Private” categories within the same organization.

Move

Only the folder Admin is able to move a folder from one top level to another and/or category.

1. Select a folder that you have created and click on the “Manage Folder” link (see Figure 1.25).
2. Highlight the name of the category that will be the new “parent” for the category (see Figure 1.26).
3. Check the box “Include Sub Categories” to also move all sub folders (optional).
4. Click on the “Move” button.
5. Click on the “Return” button to return to the Library. The folder is now a sub to the new parent folder (see Figure 1.27).

	To The Admin over the folder cannot “Move” a top level folder to another top level folder within the same category. The Admin over the folder however, can move the top level folder to a “Sub Category” of the top level.

Figure 1.26 – Manage Folder

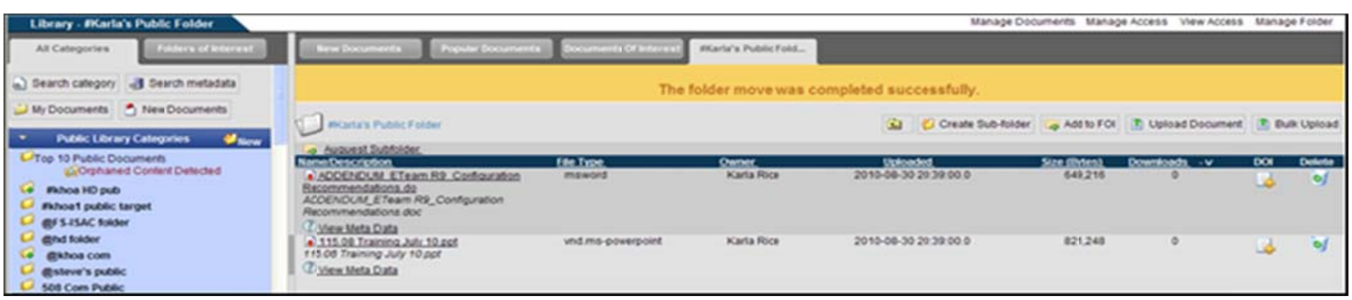


Figure 1.27 – Move Folder Confirmation

Copy

The folder Admin, SAs, and CAs with explicit access have the ability to copy a folder from any level and category to another.

1. Select the folder to be copied.
2. Click on the “Manage Folder” link (see Figure 1.25).
3. Highlight the name of the category that will be the new “parent” for the category (see Figure 1.26).
4. Check the box labeled, “Include Sub Categories” (optional).
5. Click on the “Copy” button.
6. The folder is now copied to a new parent folder (see Figure 1.28).

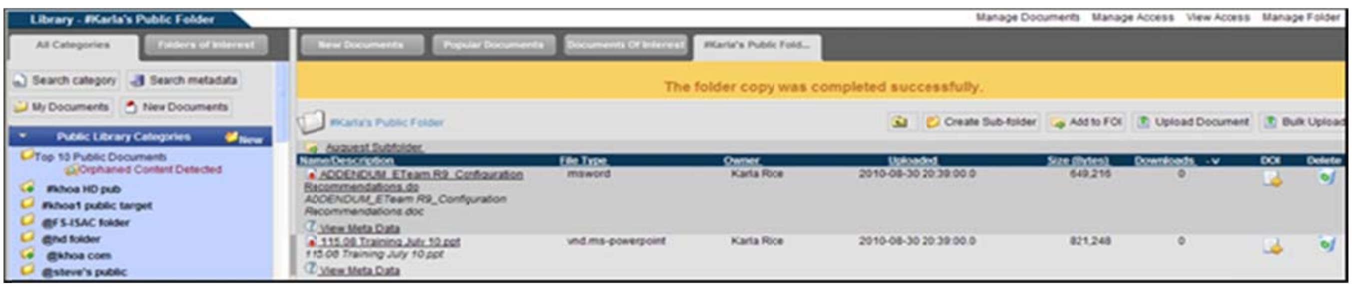


Figure 1.28 – Copied Folder

Delete

The folder Admin, SAs and CAs with explicit access have the ability to delete a folder from any level and category. Once a category is deleted, all documents within that category are also deleted and may not be retrieved.

1. Select the folder to be deleted.
2. Click on the “Manage Folder” link (see Figure 1.25).
3. Select the “Delete Folder” button (see Figure 1.26).
4. Click on the “Delete” button to confirm deletion. Click on the “Do Not Delete” button to cancel the deletion request and return to the “Manage Folder” area (see Figure 1.29).
5. Delete Confirmation Screen (see Figure 1.30).

	Subfolders must be deleted before the main folder can be deleted.

Figure 1.29 – Delete Confirmation

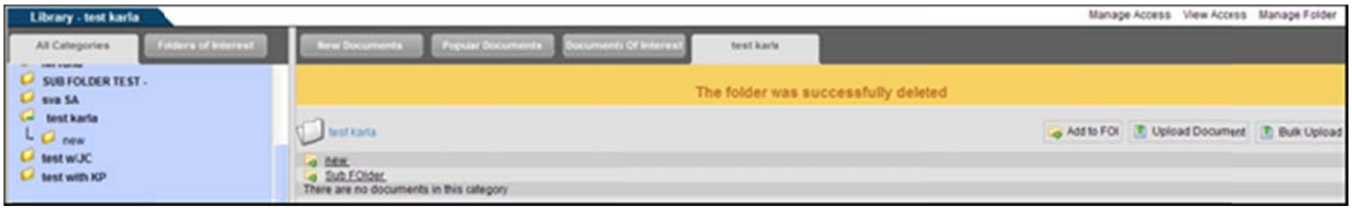


Figure 1.30 – Deletion Completed

View Folder

This link is used to take the user back to the main view of the folder.

Private Library Categories

Top 10 Private Documents

This area shows the ten most downloaded private documents in the library, in order from highest to lowest. To access the top 10 private documents, click the link under the Private Library Categories heading, on the left hand side of the library.

View/Download Documents

To view or download documents under a category or subcategory:

1. Click on the category name. Documents are alphabetically listed by name/description, file type, category, owner, date uploaded, size, and number of downloads (see Figure 1.31).
2. Click the document name.
3. Options to open or save the file are displayed.
4. Select the "save" option and the file is downloaded to the specified directory location. Select the "open" option and the file is displayed without saving the file (see Figure 1.32). Each time the file is downloaded, the number increases under the "Download" column. Category owners can click on the "View History" link to view the users, their employers, the time of the last download and number of times downloaded (see Figure 1.33).
5. View documents within a subcategory by clicking on the subcategory name and then document title.

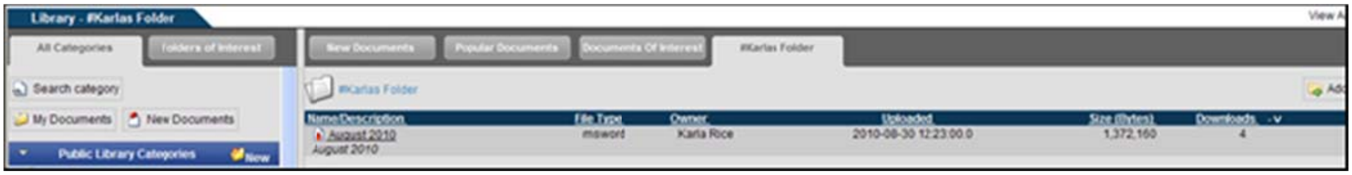


Figure 1.31 – View Category

Figure 1.32 – File Download

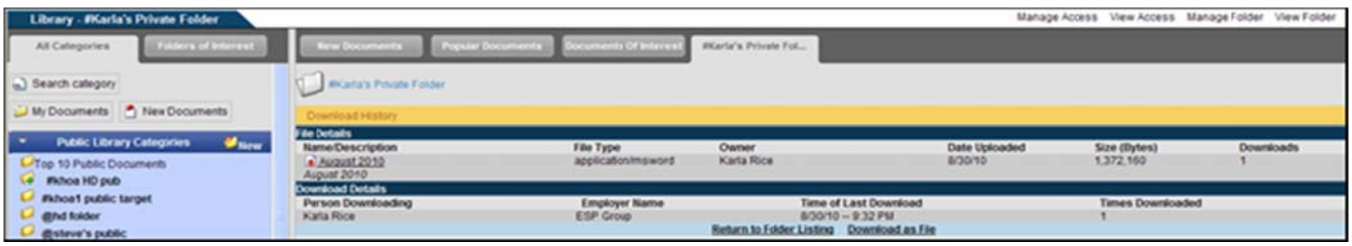


Figure 1.33 - View History

Delete Documents

Once a document is deleted, it cannot be retrieved.

1. Click on the “Delete” button next to the document name.
2. A confirmation screen is displayed (see Figure 1.34).
3. Click on the “Delete” button to delete the document.
4. Click on the “Do Not Delete” button to cancel the action and return to the previous screen.

Figure 1.34 - Confirmation Screen

Create New Category

1. Click on the “New” link (see Figure 1.35).
2. Type in the name of the category (see Figure 1.36).
3. Click on the “Create” button. Click on the “Cancel” button to return to the main library.
4. Once a category is created, the category folder is displayed in the right-hand “Library” frame. It is also listed alphabetically under the appropriate library category heading (i.e., Public or Private)(see Figure 1.37).

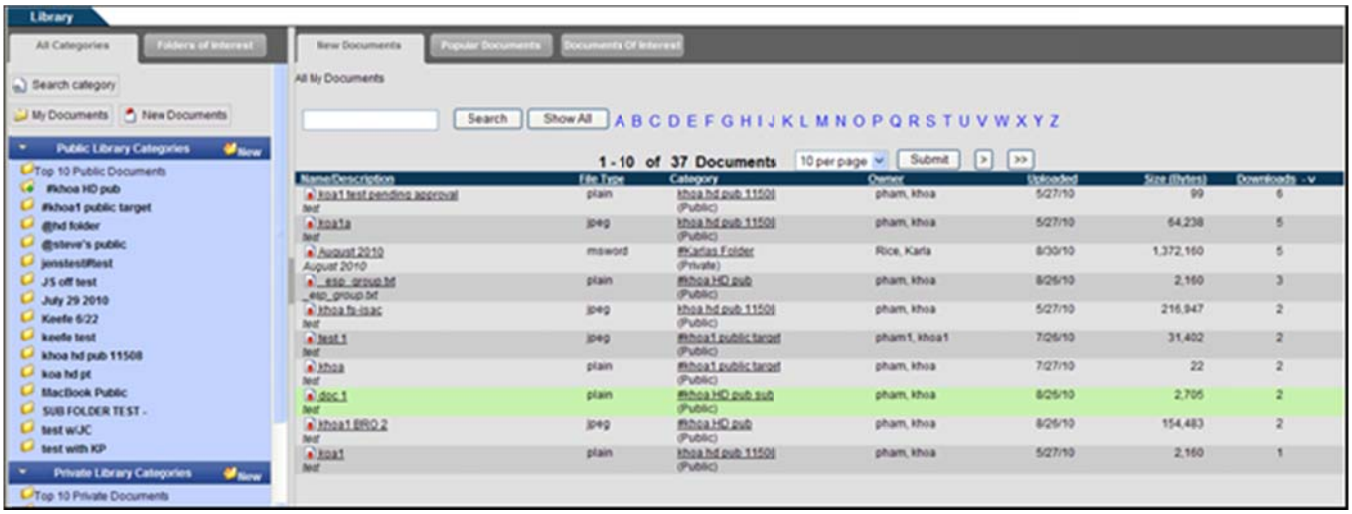


Figure 1.35 – Library

Figure 1.36 - Create a Category Name

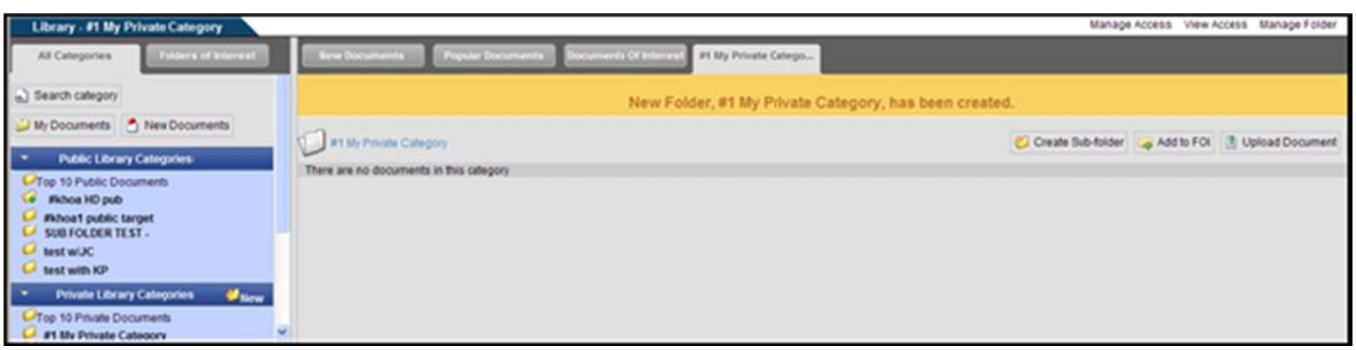


Figure 1.37 – View Private Category

> *If the user fails to enter a name for the category and selects the "Create" button, an error message is displayed.*
>
> You must enter a name for the category before proceeding.

Create Sub-Folder

1. Click on the "Create Sub-Folder" link (see Figure 1.37).
2. Type the name of the sub-folder (see Figure 1.38).
3. Click on the "Create Folder" button.
4. Confirmation that the Sub-Folder was created (see Figure 1.39).

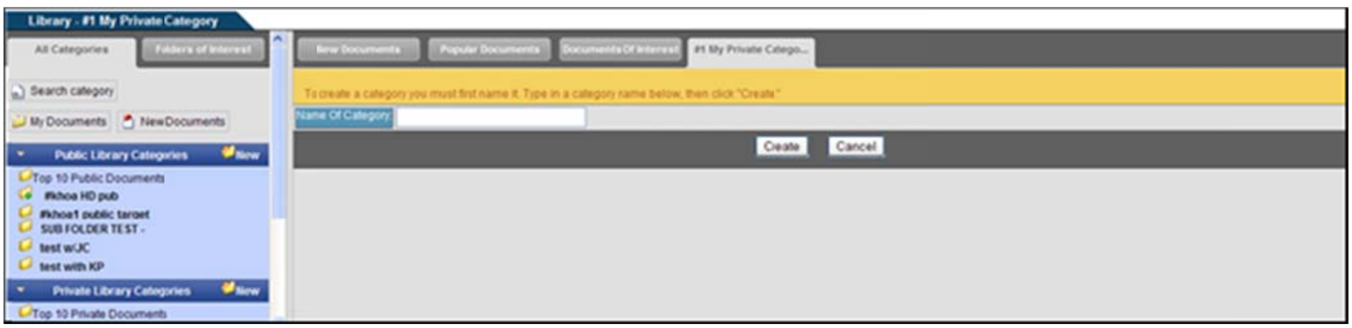


Figure 1.38 - Create Sub-Folder

> *Only Site Administrators and Community Administrators have the ability to add/delete an Admin from any category (not If the folder contains subcategories, a "+" symbol appears within the folder icon . Click on the folder icon to view the subcategories. As shown in Figure 1.39, a "-" symbol within the folder indicates that the subcategories are expanded. The number next to the category name refers to the number of documents within that category.*

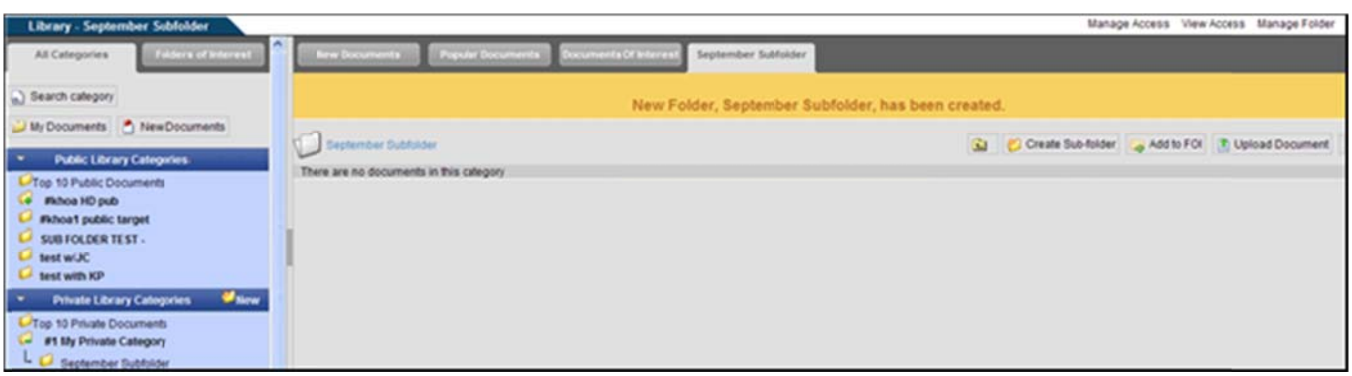


Figure 1.39 – Sub-Folder Created

Add to FOI

This link is used to add specific folders to Folders of Interest (FOI), so that they can be easily accessed in the future. For more information, refer to Section 3 – Folders of Interest.

Upload Document

All users who have admin or user access to the category can upload documents into that category. Once the document has been uploaded, the owner of the document has the ability to edit the name and description.

> *View Only users can view documents, but will not be able to upload documents.*

1. Click on the category name from the main Library.
2. Click on the "Upload Document" link (see Figure 1.39).
3. Type in the title and a description in the "Upload Document" screen (see Figure 1.40).
4. Click on the "Browse" button to select a file.
5. Select the "No" radio box if Revision Control is not required. Click on the "Yes" radio box for Revision Control (for "Private" categories only).
6. Check the box, "Send Notifications," to send a notification to all users who have access to the library category (optional). For an explanation of Notifications, click on the "Notifications" link (see Figure 1.41). The "Send Notifications" box may not be visible to users. If this is the case, then the portal is set up so that notifications are always sent to the users who have access whenever a file is uploaded.
7. See Figure 1.42 for an example of the Notification sent to the owner of the category.
8. Click on the "Upload" button and then the "Finished" button. A message is displayed stating the document was successfully uploaded into the library.

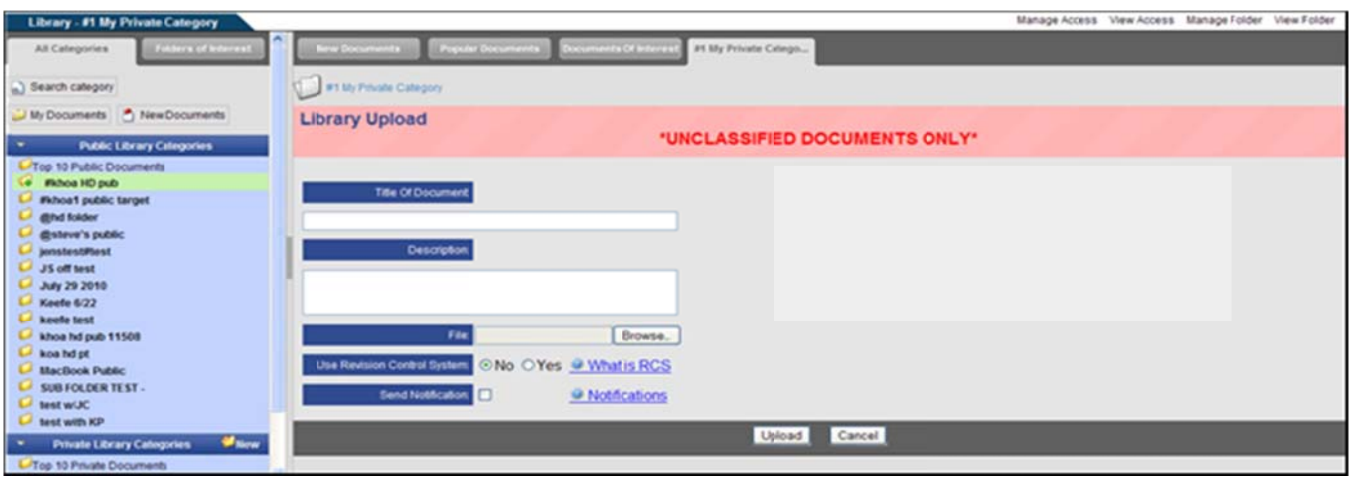


Figure 1.40 - Upload Document to Private Category

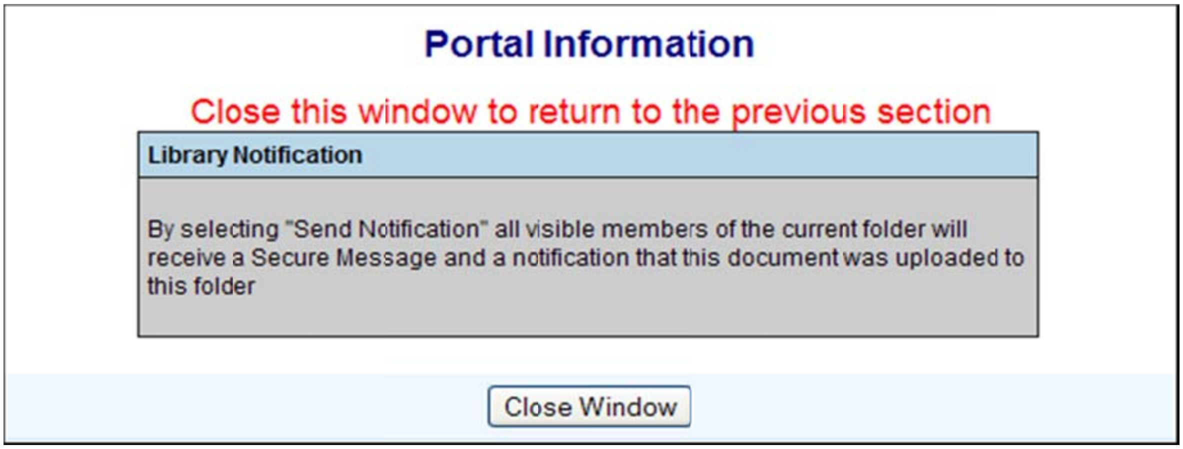
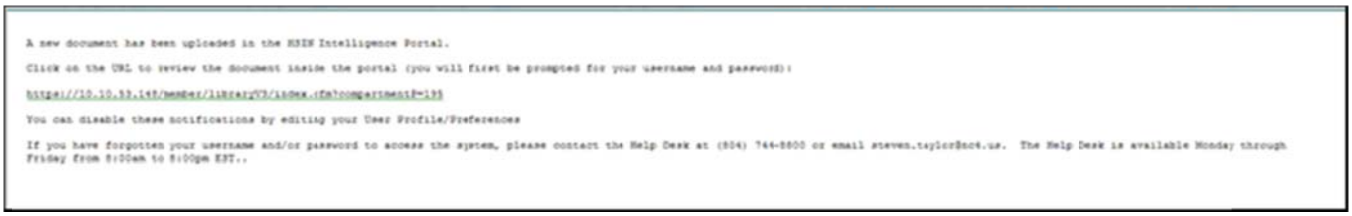


Figure 1.41 – Portal Information



A new document has been uploaded in the HSIN Intelligence Portal.

Click on the URL to review the document inside the portal (you will first be prompted for your username and password):

https://10.10.53.148/member/libraryV3/index.cfm?compartmentID=195

You can disable these notifications by editing your User Profile/Preferences

If you have forgotten your username and/or password to access the system, please contact the Help Desk at (804) 744-8800 or email steven.taylor@nc4.us. The Help Desk is available Monday through Friday from 8:00am to 8:00pm EST..

Figure 1.42 – Library Notification

Copy Document to Other Folders

The Content Manager right allows all administrators (Site Administrators, Community Administrators and Organizational Administrators) or users with this assigned right to copy documents (other than RCS documents) into multiple folders when they upload a document into a public or private folder. The document may be copied into multiple folders and across multiple compartments at one time.

1. Click the Upload Document link.
2. Fill in the Title and Description of the document (see Figure 1.43).
3. Select the “Copy Document to Other Folders” checkbox and the list of folders that can be selected, will be displayed below it.
4. Highlight the folder or hold “Ctrl” button to select more than one folder.
5. Click on the “Browse” button to select a file.
6. Select the “No” radio box next to RCS because you may not copy RCS documents into other folders.
7. Check the box, “Send Notifications,” to send a notification to all users who have access to the library categories (optional). The “Send Notifications” box may not be visible to users. If this is the case, then the portal is set up so that notifications are always sent to the users who have access whenever a file is uploaded.
8. Click on the “Upload” button and then the “Finished” button. A message is displayed stating the document was successfully uploaded into the library.

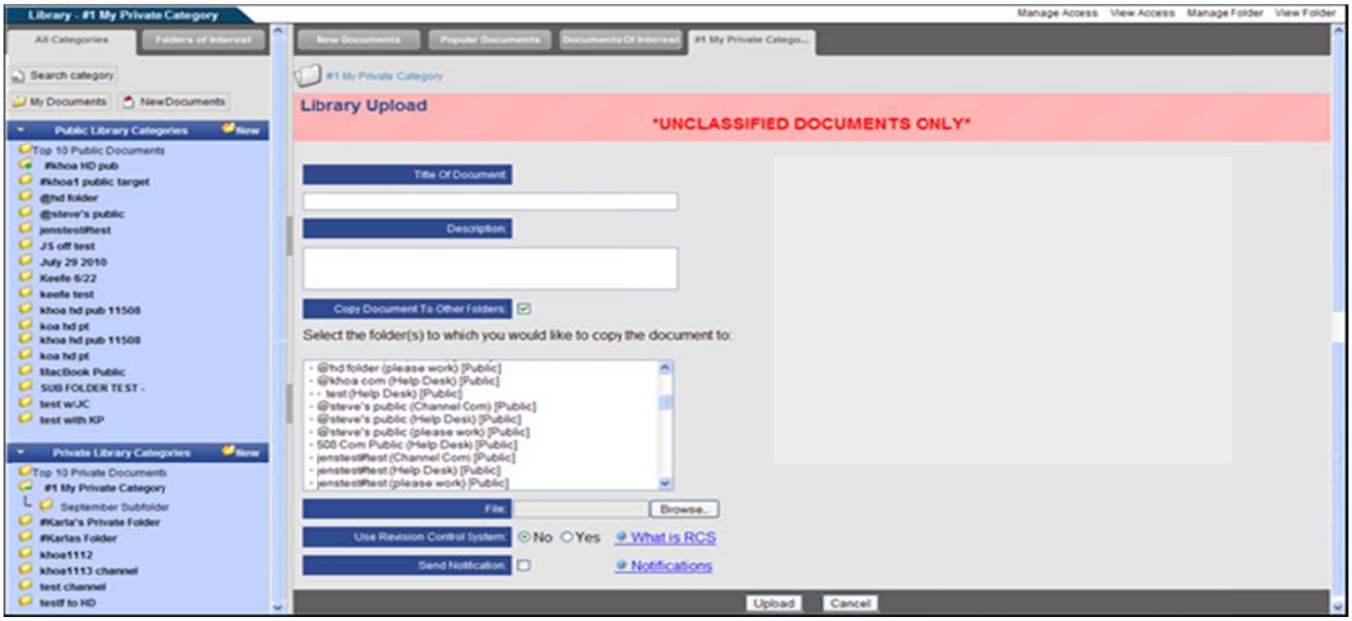


Figure 1.43 – Content Manager

Revision Control System

If the user selects the "Yes" radio box for revision control, the Revision Control System screen is displayed (see Figure 1.44). Use this screen to grant specific user's rights to the RCS document

1. Type the name in the "Search" field.
2. Click on the "Search" button to search for a user. The "Available Users" box is now updated with the search results.
3. Highlight the names of the users under "Available Users" field.
4. Select a user right (i.e., Admin, Edit, Vote, and/or View) by clicking on the appropriate check box.

- Admin – ability to download the document, view previous versions, edit the document, force unlock, manage access, vote and view votes.
- Edit – ability to download the document, view previous versions, edit the document and can unlock the document (only if you have it locked).
- Vote - ability to download the document, view previous versions and vote.
- View - ability to download the document and view previous versions.

5. Click on the  button to move the users into the "Users in Category" field.
6. View users with a particular access right by clicking on the appropriate check box under "Show Users with these Rights." Click on the "Refresh" button. The "Users in Category" field is updated to include the users with that access right.
7. Type the voting question in the "Voting Question" field, if required and select the "No" or "Yes" radio box to allow multiple votes by a user.
8. Click on the "Save" button.

9. Click on the “Update” button and then the “Finished” button.
10. Click on the “Cancel” button to cancel changes and returning to the main library.

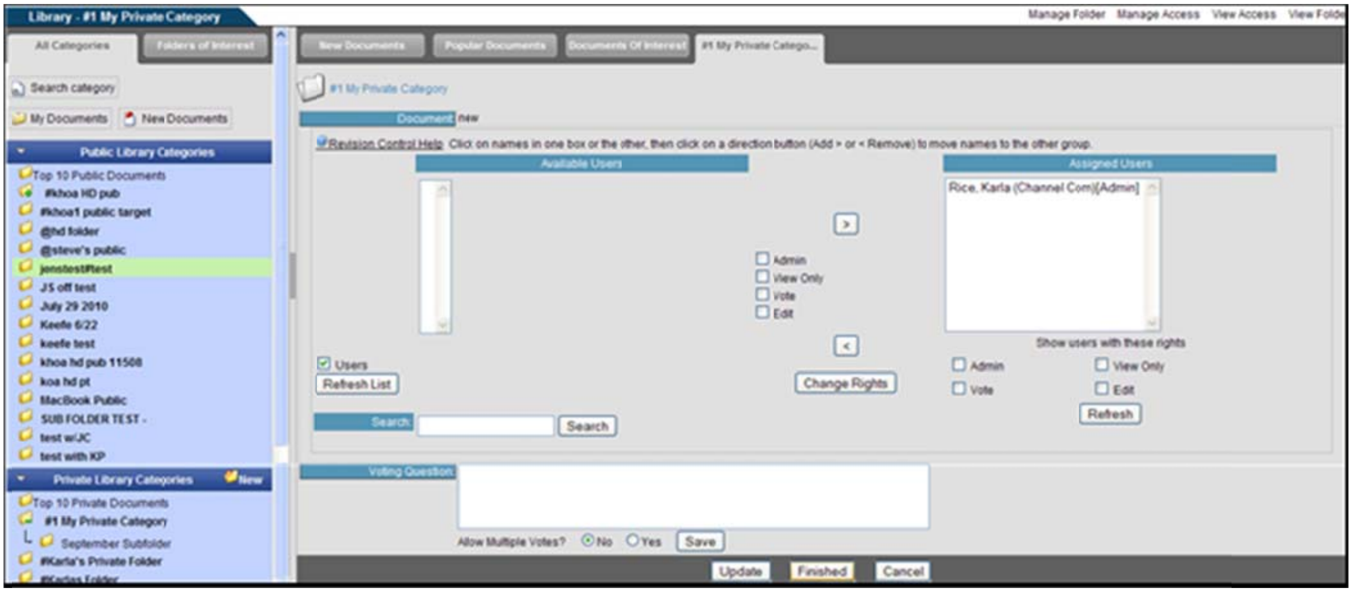


Figure 1.44 - Revision Control System

To select multiple user names in a row, hold the shift key and highlight the names, select the appropriate user right, and click on the “>” button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names, select the appropriate user right, and click on the “>” button. The user names are moved to the “Users in Category” field.

Once a document includes revision control, users are able to download the document for editing purposes (see Figure 1.45). Each time the document is edited it will be stored so that the user may go back to view any “Previous Versions” of the document. Category owners can manage user access and or documents, by clicking on the “Manage Document,” “Manage Access,” “View Access,” “Manage Folder,” and “Search” links (see Figure 1.45). The “Revision Control System” screen allows the category owner via the “Manage Documents” link to move, copy, edit or delete (see Figure 1.46). The user has the ability to “Manage Folder,” “Manage Access,” “View Access,” “View Folder,” or “Search” depending on the rights (see Figure 1.46). Users with “Edit” rights will see a “Manage Documents” link. Selecting this link allows users to download the document for editing purposes.

Figure 1.45 – RCS Document (Admin View)

Figure 1.46 - Manage Documents

Edit Version (RCS documents only)

Users with “Edit” rights will have the option to edit the document.

1. Click on the “Edit Version” link.
2. The user has the option to download the document without locking out other users. Click on the “Download” button and select the open or save options (see Figure 1.47).
3. To lock out other users from editing the document, click on the “Yes, Continue” button. The next screen displays a message that the document is locked until it is checked back into the library.
4. Click the “Download” button to download the document for editing.
5. After editing, return to the library category to check the document in.
6. Click on the “Check Document In” link or click on the “Unlock/Cancel” link to unlock the document and return the original version of the document to the category (see Figure 1.48).
7. To check the edited document in (see Figure 1.49):
   i. Click on the “Browse” button and select the edited document to be uploaded.
   ii. Click on the “Upload” button. A message is displayed stating the document has been uploaded and the document version number has been changed.

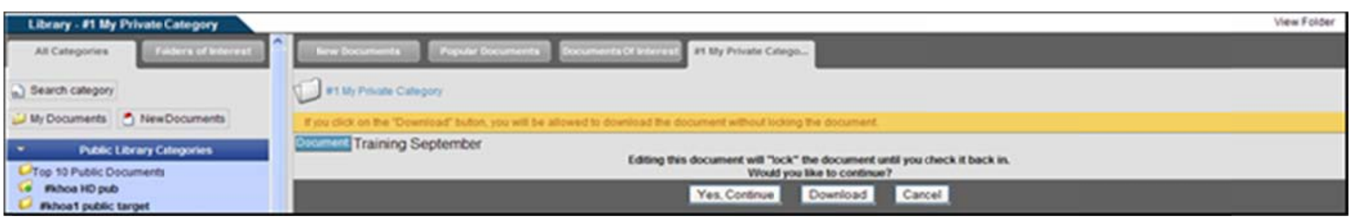


Figure 1.47 - Download a Document

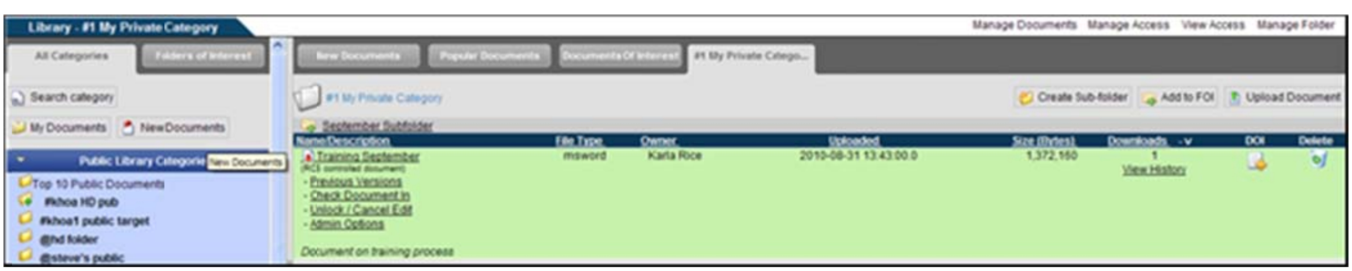


Figure 1.48 - Check-In and Unlock a Document

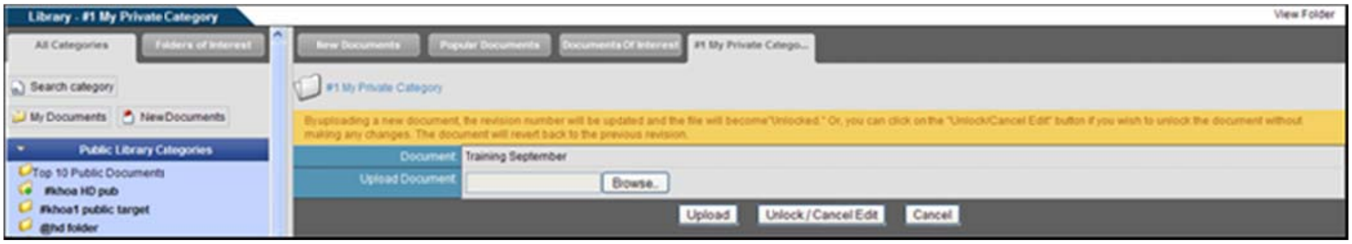


Figure 1.49 - Check Document In

Turn RCS "On" or "Off"

The Admin of the document has the ability to turn the RCS "on" or "off" at a time. If the user selects the "Manage Documents," the Manage Document screen is displayed (see Figure 1.48).

1. Click on "Edit" next to the document.
2. Edit the Description and Name in the appropriate fields, if appropriate (see Figure 1.50).
3. Click on the bullet next to "Place under RCS" to turn RCS "on" or "Remove from RCS" to turn RCS "off."
4. Click on the "Update" button and the user will receive a confirmation the document has been updated. Click on the "Cancel" button to return to the Manage Document screen without updating the RCS controls.
5. Click on the "View Folder" link to return to the Document Versions screen.

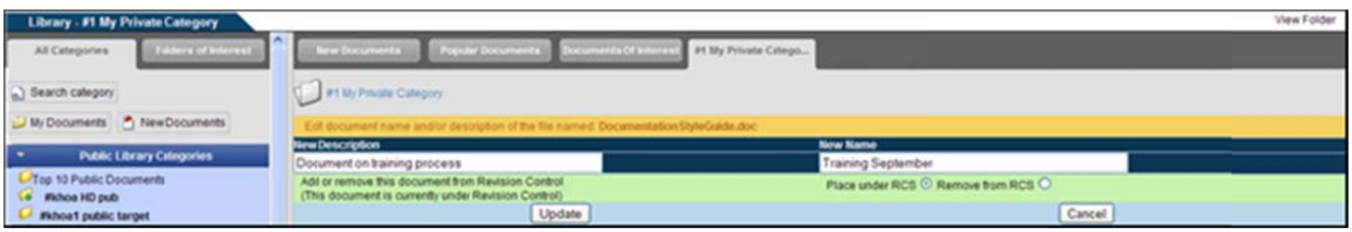


Figure 1.50 - Admin Revision Controls

Bulk Upload

Bulk Upload allows a user to upload multiple files at one time into the Library. A single file cannot exceed 4 MB, and the entire bulk load cannot exceed 30 MB. The right to bulk upload is restricted to SAs, CAs and assigned users with this right. The bulk uploading process is limited to uploading into one folder at a time. The "Name" and "Description" is set to the client file name by the portal. (***NOTE: The Bulk Upload feature only works with Internet Explorer and Flash Player 8 or above. This feature is not enabled on all portals).

1. Click on the "Bulk Upload" link (see Figure 1.51).
2. Click on the "Browse" button (see Figure 1.52).
3. Select which files to upload. To select multiple files, hold the "Shift" or "Ctrl" key down while making selections (see Figure 1.53).
4. Click on the "Open" button to add the file to the list to be uploaded.

5. To remove a file before uploading, highlight the file and click on the "Remove" button.
6. Click the "Reset" button to remove all files.
7. Check the box, "Send Notifications," to send a notification to all users who have access to the library categories (optional).
8. When finished selecting the files, click on the "Upload" button.
9. When the system is finished uploading the files, text below the file box indicates whether the file upload was successful or not (see Figure 1.54).
10. Click on the "View Folder" link to return to the folder and view the documents currently in the selected folder.

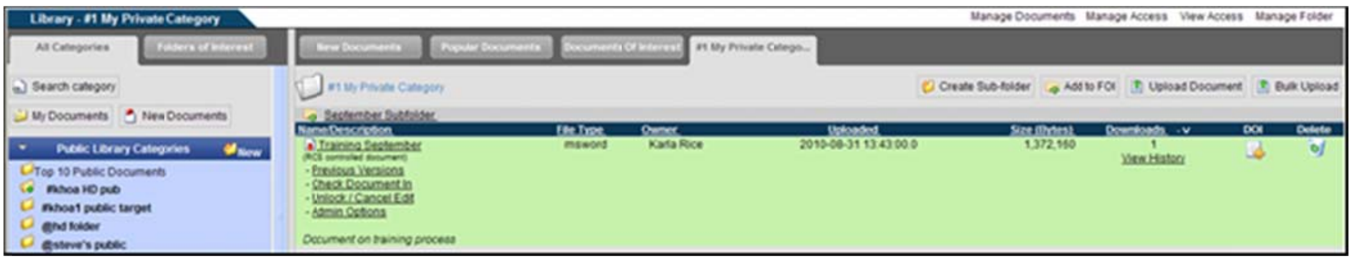


Figure 1.51 – Main Folder

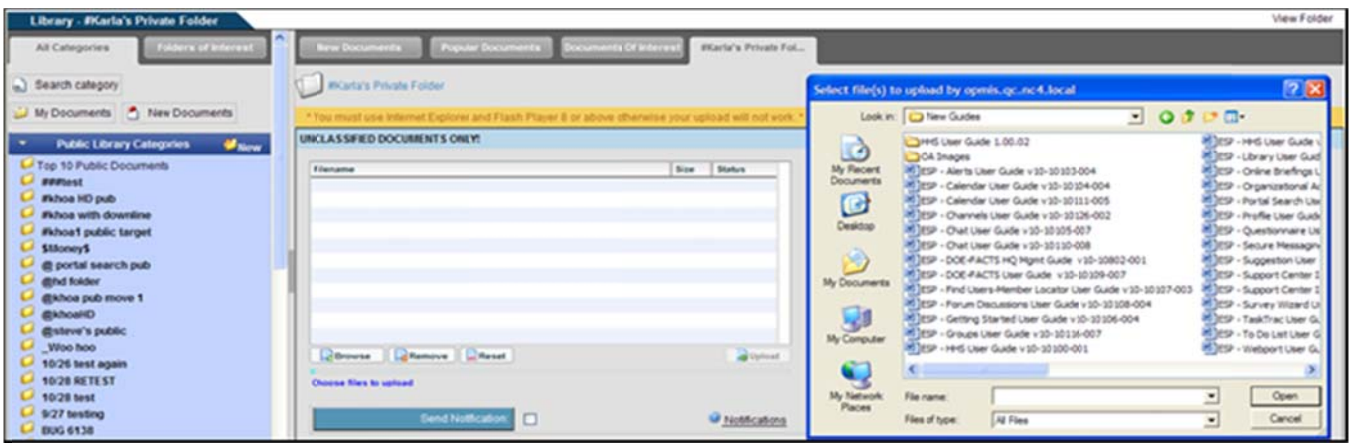


Figure 1.52 – Browse Documents for Upload

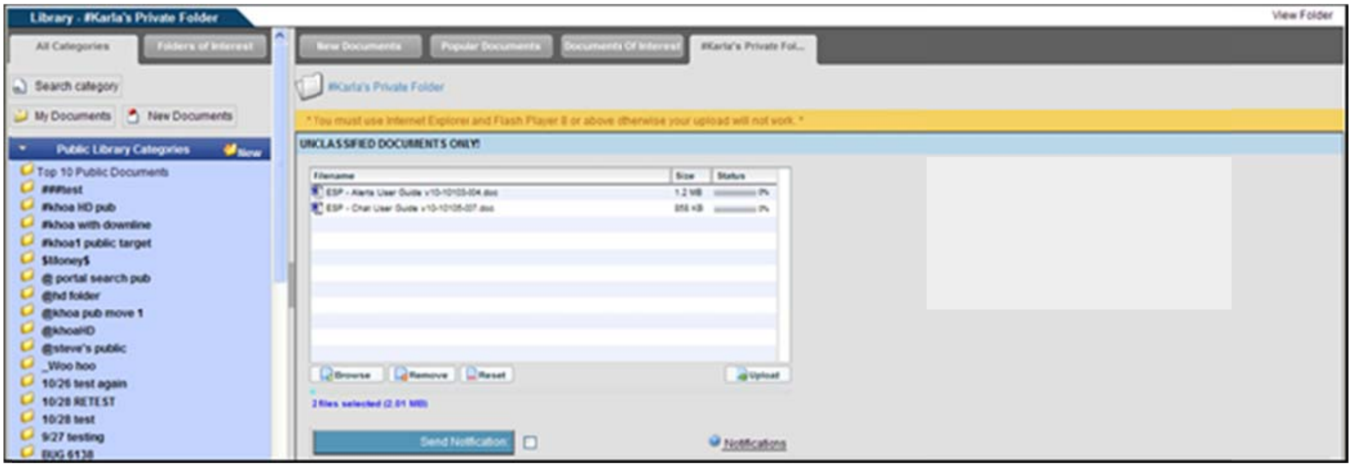


Figure 1.53 – Selected Files for Upload

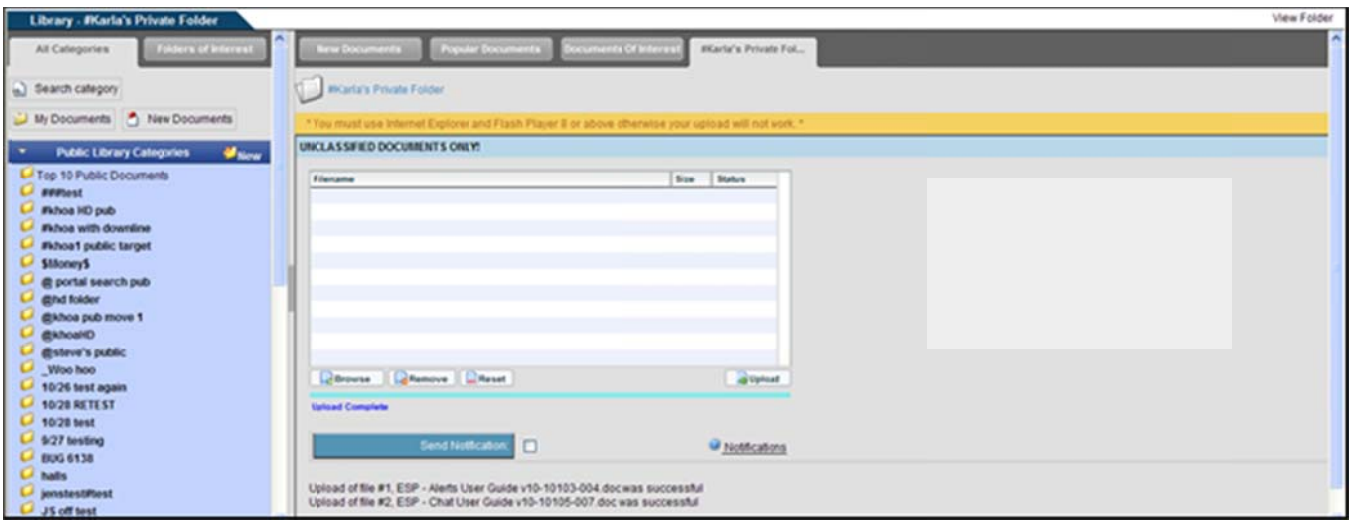


Figure 1.54 – Bulk Upload Completed

Manage Access

When viewing your library category, the "Manage Access" link is displayed in the upper right-hand corner. The user's access rights determine which links are shown. For Public folders, click on the "Manage Access" link and a screen is displayed with the user names, organizations and groups that can access the folder along with their user rights. Only Site or Community Administrators can grant access to and delete Public categories.

Once a Private category is created, the category owner may grant access to organizations, groups, and/or users and change current rights (see Figure 1.55). The owner of a Private category has the ability to assign the member different roles within the folder. These three roles are:

- Admin: those users with Admin rights have the ability to manage the folder and any documents within the folder, upload documents, create sub-folders, delete documents and manage user access to the folder and sub-folders.

- User: those users with this right have the ability to upload documents, view and download documents, search the folder and view access to the folder.
- View Only: those users with View Only rights have the ability to view and download documents, search the folder and view access to the folder.

Rights assigned through My Groups (for Shared Groups) will not be applicable in this tool.

To grant user access to the category:

1. Click on the category from the left-hand frame.
2. When the category is displayed, click on the “Manage Access” link in the upper right-hand corner.
3. Select the “Orgs,” “Users,” “My Groups,” and/or “Channels” check boxes and click on the “Refresh List” button. The “Available Users” field is updated with the user selection (see Figure 1.3). Depending on your portal configuration, if you choose the “Users” radio box, you may need to type in search criteria and execute a search before the list will contain matching and available records.
4. Type in the name of a user, group, or organization in the “Search” field. Depending on your portal configuration, the administrator may have set a minimum number of search characters. (The minimum number of search characters does not apply to Site and Community Administrators). You will receive an error message if there is a minimum search criteria established and you have entered fewer characters than the set minimum.
5. Highlight the appropriate user name.
6. Click on the “Include Subs?” check box if the user should have access to all sub-folders created below the parent folder.
7. Select the rights that each user should have by clicking on the bullet next to “Admin,” “Read/write,” or “Read Only.”
8. Click on the > button to grant users rights and access. Highlight a user’s name and select the < button to move a user back to the “Available Users” list to revoke access.
9. Click on the “Update Category” button and then click on the “Finished” button.
10. Select the “Cancel” button to return to the Library.

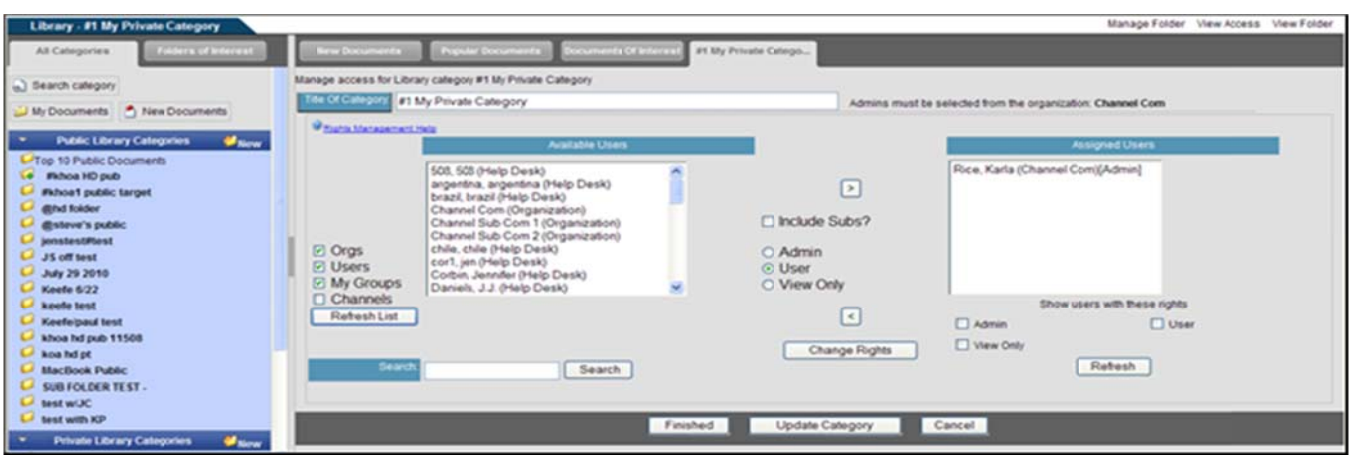


Figure 1.55 – Manage Access

	To select multiple user names in a row, hold the shift key and highlight the names, select the user right, and click on the ">" button. To select more than one user and skip users within the list, hold the Ctrl key, highlight the names, select the user right, and click on the ">" button. The user names are moved to the "Users in Category" field.

Tips for Managing Access of Parent and Sub- Folders

- When granting access to a parent folder, click on the "Include Subs" box if you would like the user(s) to automatically have access to any sub-folder. When the administrator does not check "Include Subs," those users and/or organizations will be available to grant access to a sub-folder but they won't automatically have access.
- When granting access to a sub-folder, the folder administrator will only be able to grant access to those users and/or organizations that have been granted access to the parent folder.
- Removing a user from the parent folder automatically removes them from all sub-folders.
- If an organization is granted access to the parent folder, the user cannot add or remove individuals from that organization from the sub-folder level (it must be done at the organization level).
- To manage individual users the sub-folder level, they must be added as users at the parent folder level.
- You may change the rights of active participants in the current folder by selecting a user, selecting a right and then pressing the "Change Rights" Button.
- You may change the rights of active participants in the current folder AND all sub-folders by selecting a user, selecting a right, checking the "Incl. subs" box and then pressing the "Change Rights" button.

View Access

This area will display the names of users, organizations and admins that have access to the category (see Figure 1.56). It will also display the access they have over the folder. "View only" and "Admin" rights will be displayed next to each person's name, but if an individual was given the "User" right, the right will not show up next the person's name.

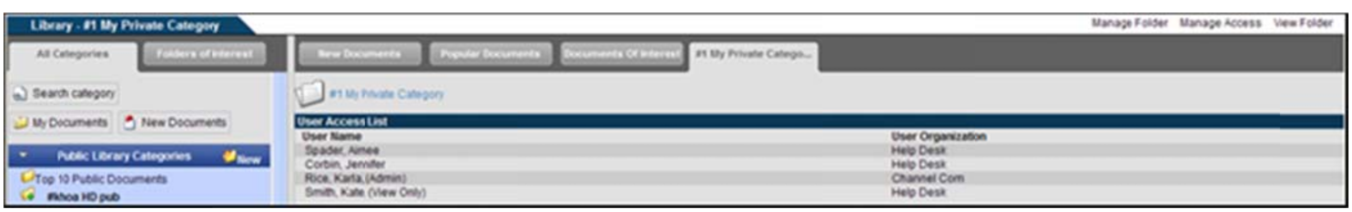


Figure 1.56 – View Access

Manage Folder

The Manage Folder link allows the user to move, copy and delete a folder. The folder Admin has the ability to move and copy the folders, as well as add multiple Administrators to a folder for both "Public" and "Private" categories within the same organization.

Move

Only the folder Admin is able to move a folder from one top level to another and/or category.

1. Select a folder that you have created and click on the “Manage Folder” link (see Figure 1.56).
2. Highlight the name of the category that will be the new “parent” for the category (see Figure 1.57).
3. Check the box “Include Sub Categories” to also move all sub folders (optional).
4. Click on the “Move” button.
5. Click on the “Return” button to return to the Library. The folder is now a sub to the new parent folder (see Figure 1.58).

> *The Admin over the folder cannot “Move” a top level folder to another top level folder within the same category. The Admin over the folder however, can move the top level folder to a “Sub Category” of the top level.*

Figure 1.57 – Manage Folder

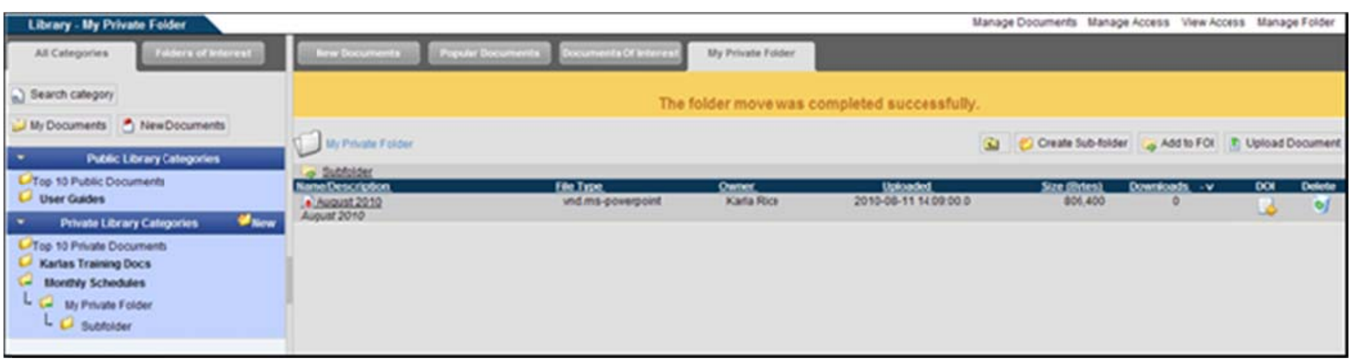


Figure 1.58 – Move Folder Confirmation

Copy

The folder Admin, SAs, and CAs with explicit access have the ability to copy a folder from any level and category to another.

1. Select the folder to be copied.
2. Click on the “Manage Folder” link (see Figure 1.56).
3. Highlight the name of the category that will be the new “parent” for the category (see Figure 1.57).
4. Check the box labeled, “Include Sub Categories” (optional).
5. Click on the “Copy” button.
6. The folder is now copied to a new parent folder (see Figure 1.59).

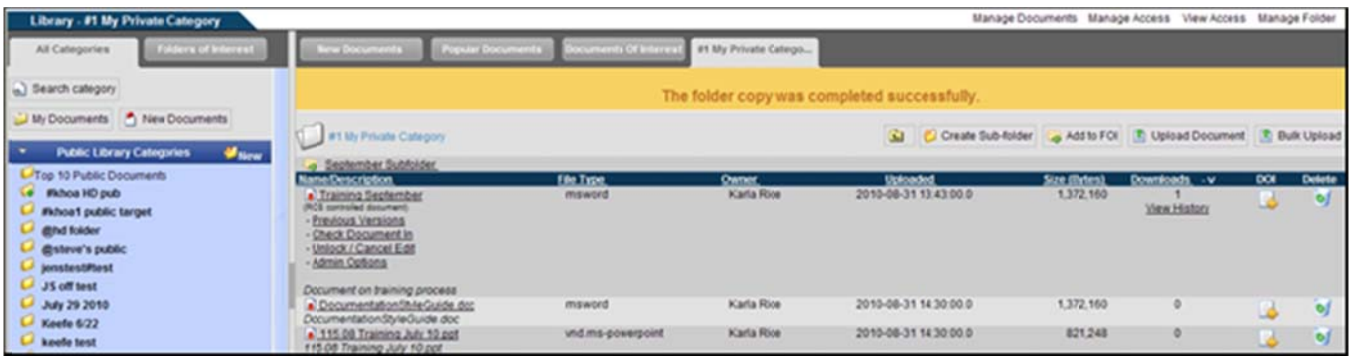


Figure 1.59 – Copied Folder

Delete

The folder Admin, SAs and CAs with explicit access have the ability to delete a folder from any level and category. Once a category is deleted, all documents within that category are also deleted and may not be retrieved.

1. Select the folder to be deleted.
2. Click on the “Manage Folder” link (see Figure 1.56).
3. Select the “Delete Folder” button (see Figure 1.57).
4. Click on the “Delete” button to confirm deletion. Click on the “Do Not Delete” button to cancel the deletion request and return to the “Manage Folder” area (see Figure 1.60).
5. Delete Confirmation Screen (see Figure 1.61).

Subfolders must be deleted before the main folder can be deleted.

Figure 1.60 – Delete Confirmation

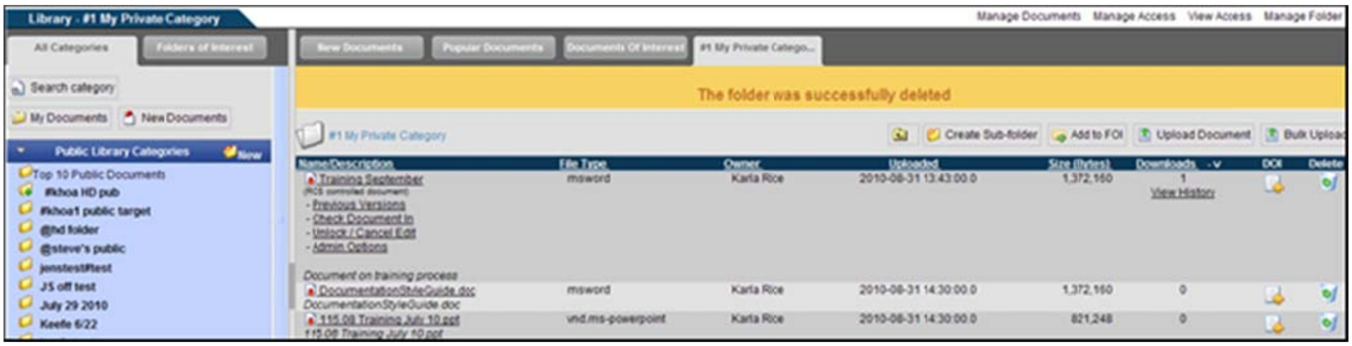


Figure 1.61 – Deletion Completed

View Folder

This link is used to take the user back to the main view of the folder.

Orphaned Content Detected

Orphaned Content will show all administrators (Site Administrators, Community Administrators and Organizational Administrators) the folders and RCS documents that have no active administrator. The administrators will be able to assign admin rights over the folders or RCS documents to others or themselves.

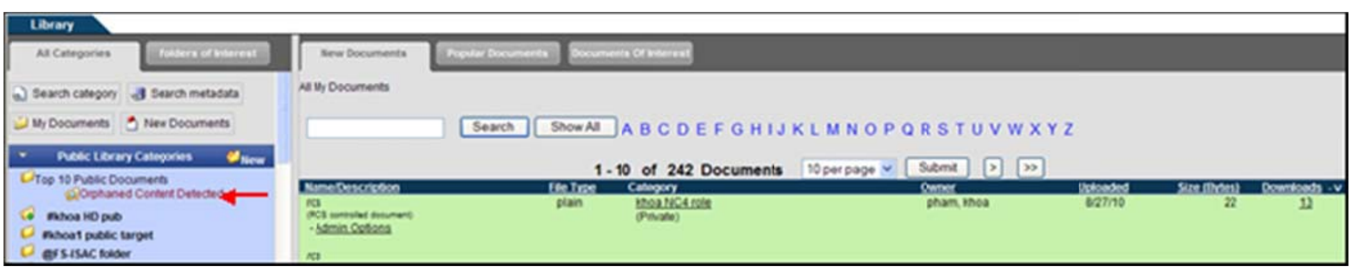


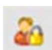
Figure 1.62 – Orphaned Content

Orphaned Categories

This tab will show all folders that no longer have administrators (see Figure 1.63).

Figure 1.63 – Orphaned Categories

Assign New Administrators

1. Click the Orphaned Content Detected link (See Figure 1.63).
2. Click the Orphaned Categories tab.
3. Click on the  icon shown under the Action column to assign an administrator.
4. Follow instructions in the Manage Access section for assigning new administrators.
5. Once an administrator is assigned rights over a folder or RCS document it will be removed from the Orphaned Content queue.

Delete Categories

1. Click the Orphaned Content Detected link (See Figure 1.63).
2. Click the Orphaned Categories tab.
3. Click the  icon to delete the folder.
4. Click on the “Delete” button to confirm deletion. Click on the “Do Not Delete” button to cancel the deletion request and return to the “Orphaned Categories” area (see Figure 1.64).
5. Delete Confirmation Screen (see Figure 1.65).

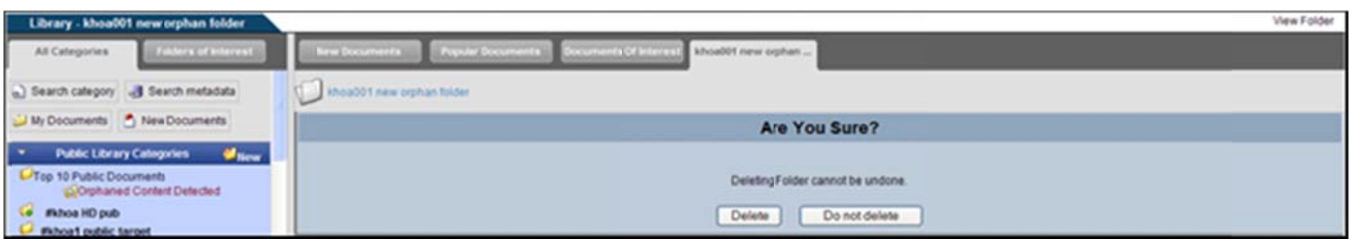


Figure 1.64 – Delete Confirmation

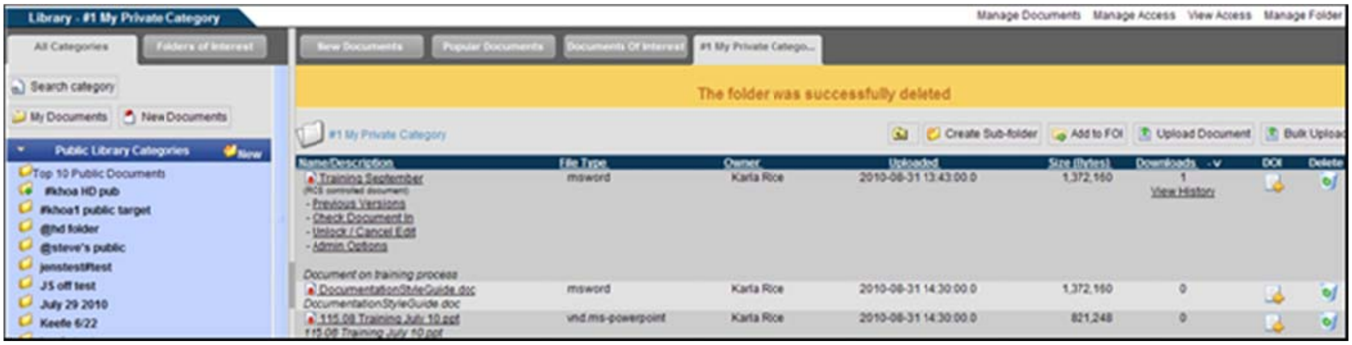


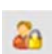
Figure 1.65 – Deletion Completed

Orphaned Documents

This tab will show only RCS documents that no longer have administrators (see Figure 1.66).

Figure 1.66 – Orphaned Documents

Assign New Administrators

1. Click the Orphaned Content Detected link (See Figure 1.66).
2. Click the Orphaned Documents tab.
3. Click on the  icon shown under the Action column to assign an administrator.
4. Follow instructions in the [Manage Access]() section for assigning new administrators.
5. Once an administrator is assigned rights over a folder or RCS document it will be removed from the Orphaned Content queue.

Delete Documents

1. Click the Orphaned Content Detected link (See Figure 1.66).
2. Click the Orphaned Documents tab.
3. Click the  icon to delete the document.
4. Click on the “Delete” button to confirm deletion. Click on the “Do Not Delete” button to cancel the deletion request and return to the “Orphaned Documents” area (see Figure 1.64).
5. Delete Confirmation Screen (see Figure 1.65).

Folders of Interest

The Folders of Interest tab allows the user to store specific folders in one place so that the user may navigate quickly to them. By default, users may only pick 10 Folder of Interest. That default can be changed by the Community Administrator or Site Administrator so that the users will be able to add more folders to the Folders of Interest queue.

Add to FOI

1. Find the document you wish to add under the Folders of Interest Tab.
2. Click the  icon to add the folder or the  icon to remove the folder (see Figure 1.67).
3. Click on the Folders of Interest tab.
4. The folder will be displayed and may be removed if needed.

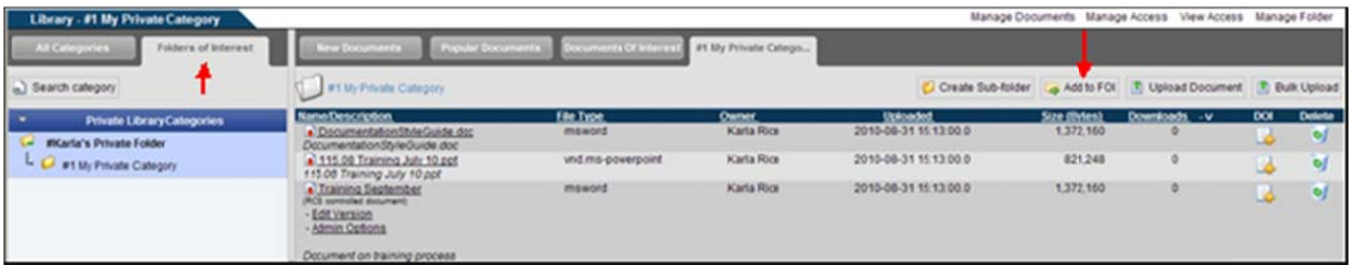


Figure 1.67 – Folders of Interest

New Documents

This area displays documents that you have not downloaded and have been posted within the last week. Refer to Section 4 – New Documents for additional information. You are able to search specific documents, search by first letter (A-Z) of name or description, change the number of results that can be viewed on each page (max 50) and move ahead/back to view results on other pages.

Search New Documents

1. From the main library screen, to search for new documents, type in the name of the document or select a letter from the main library (see Figure 1.68).
2. A list of documents is shown by name, file type, category, owner, upload date, file size, and number of downloads.
3. To increase the number of documents displayed, use the drop down arrow and select the appropriate number per page.
4. Click on the “Submit” button and the search results are shown.

Figure 1.68 - New Document Search

Popular Documents

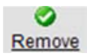
The Popular Documents tab shows the top 10 downloaded documents that user has been given access to and includes documents from both public and private categories. The documents are in order from the highest to the lowest downloaded count (see Figure 1.69).

Figure 1.69 – Popular Documents

Documents of Interest

The Documents of Interest tab allows the user to store specific documents in one place so that the user may navigate quickly to them. By default, users may only pick 10 Documents of Interest. That default can be changed by the Community Administrator or Site Administrator so that the users will be able to add more documents to the Documents of Interest queue.

Add to DOI

1. Find the document you wish to add under the Documents of Interest Tab.
2. Click the  icon under the DOI column to add the document or the 

icon to remove the document (see Figure 1.70).

3. Click on the Documents of Interest tab.
4. The document will be displayed and may be removed if needed (see Figure 1.71).

Figure 1.70 – Add DOI

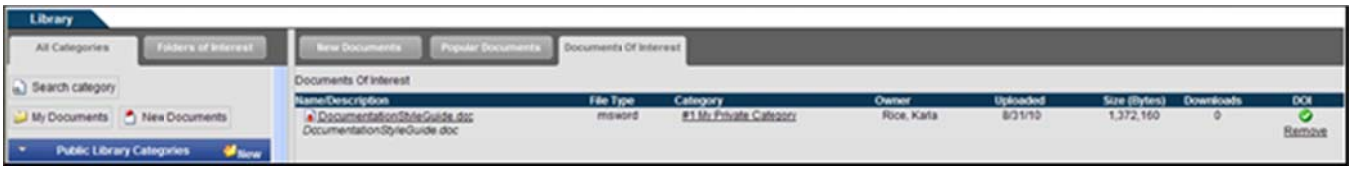


Figure 1.71 – Documents of Interest Tab

Frequently Asked Questions (FAQs)

1. How do I know what information I can access?

   You can only access the library categories that you have been granted specific access. These categories are listed in your library. To access a document, click on the category name and then the document name. Refer to section My Documents.

2. I have several documents that I want to upload into the library. How do I create a new category?

   To create a "Public" category, you need to have Site or Community Administrator rights. Any user can create a "Private" category to store documents. Refer to section Create New Category.

3. How do I add users to access a category?

   To view or edit user access, click on the "Manage Access" or "View Access" link. For detailed steps, refer to section Manage Access.

4. How do I upload a new document into a category?

   You can upload documents into categories that you have been granted access. To upload a document, click on the category name and click on the "Upload File" link. For detailed instructions, refer to section Upload Document.

5. What types of files can I upload into the library?

   You can upload any type of file.

6. When uploading a document, how can I track user access, for example, editing and viewing the document?

   Through the Revision Control System (RCS), you can assign user rights to selected users for document access. Refer to Revision Control System.

7. I want to save a document of my PC. How do I download a document?

   You can click on the document name. If you have "Edit" rights, you can click on the "Edit Version" link to download the document for editing. Refer to View Documents.

8. Once I completed editing a document, I need to upload it into the category. How do I upload it?

   From the category, click the "Check Document In" link to place the edited version into the folder. Refer to Edit Version (RCS documents only).

9. How do I search for a particular document?

   There are several options for searching for a document. At the top, left side of the main library screen, click on the "Search" link, enter in the search criteria, and select the "Search" button. For the other options, please refer to Search All My Documents.

10. How do I delete a document from the library?

    In order to delete a document from the library, you must be the document owner or an Administrator. Refer to section Delete Documents.

11. Can I upload a document into multiple categories?

    In order to upload a document into multiple categories you must be a Content Manager. Refer to section Copy Document to Other Folders.

12. Is there a way to access documents and folders more easily than scrolling through the list of all categories?

    In order to access documents and folders more easily, you may add those documents to the Documents of Interest or Folders of Interest. These queues allow you to store specific documents and folders in one place so that you may navigate quickly to them. Refer to Documents of Interest (DOI) or Folders of Interest (FOI).