

Complete Portal User Guide Extranet Secure Portals Software User Guide

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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."
- 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.

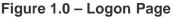


Contact your Organizational Administrator (OA) or the Support Center BEFORE registering to the portal. It is critical to obtain an Organizational ID to enter in during the registration process! Your OA is the point of contact for your group within the portal and more than likely the person who asked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





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
- 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.

will need an Organization IE in order to complete the registration process. u do not have one, you mustcontact your gc_fps Point of Contact within your organization.	
ur organization is not alread participating on this system, contact the qc_fps ESP Group is	Help Dek at steven tavlor@nc4 us khoa pham@nc4 us in order to have your organization established so that it can participate on this system.
ired Fields	
'First Name:	Create a username tetween 3 to 40 characters.
Last Name	Your username cannit
* Orcanization ID	contain any spaces
- Organization ID	 use any of thefollowing special characters,
'Username'	as they will bestripped out upon processing: "#","&", "<", or ">"

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@.**

Required fields are indicated by a ** *, * Password DHS St * Re-Entir Password	tong Password Requirements	Your tassword m one speci one upper	rd between 8 to 15 characters. ust contain at least. al character (shift-numer) case character character character
Guestion 1 Pleas	e select question 1:	Select and Answ	er Two Additional Security Questions:
* Answer 1. Answer	r First Queston Here	Thesi questions	are used by the site administrator for extra security if there is ever a problem with your account or account status. For example, I you ever need to have your password reset or if you need to
Question 2 Pleas	e select question 2:	have your account	status changed, the ste administrator may ask you one ir both of these questions in addition to other account information for verification purposes.
* Answer 2 Answe	er Second Question Here		

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.

* Email Address			* Phone Number:	Ext
	Email Format Example: steven.taylor@nc4.us.khoa.ptam@nc4.	us		
Atemate Email			Alternate Phone Number	Ext
Job Title			Fax Number	
Enployer Name			Text Pager (Enail Format)	? Help
Employer Address				
City				
State/US Teritory/Province				
Zo/Postal Code				

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.



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 Nonstruction

 Thank you for filling out the online application to register to the portal.

 Your application is not yet complete.

 You will receive a verification email to the primary email address you listed in your online application that vill ask you to continm your registration. The email will contain a hyperiok with ether the word Verify or a ong string of characters that you must click on in order to complete your application. If you do not verify your application by dickingon this link, your account cannot be approved. This step is important b help ensure that your email address is not being used inappropriately in registration.

 Once you have confirmed your application, your Administrator will be notified of your completed application. Conce your administrator approves your account, you will receive a frait email letting you know that you are able to log into the system with the usemame and password you selected during registration.

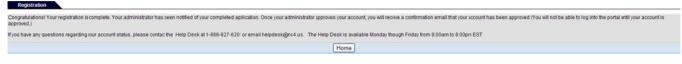
 if you need assistance confirming yur application or if you want to make sure your application is complete, please contact the ESP Group Help Desk:

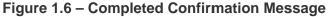
Figure 1.4 - Confirmation

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.

-	Portal Notifications <notifications@espgroup.net> 05/13/2010 09-51AM</notifications@espgroup.net>	To	& karls.rice@no4.us
Please resiond to	Please resiond to	bcc	
-	notifications@esoroup.net	Subject	qc Application
This em	all address was used to register for a new account on the go	Portal.	
To comp		ik shown below or c	
To comp and pas	lete your registration, you must either click on the hyperli te all lines into your browser's URL line in order to comple	nk shown below or c we your application)	ut and paste the following URL into your browser. (If the URL wraps into multiple lines, you will need to cut D <u>C43E2422922</u> =>https://hsin.qc.espgroup.net/signup/verify.cfm?id=6128FIE19F9E511F3D0A84BD0E44DC4AL2422922
To comp and pas <a href<br="">If you	lete your registration, you must either click on the hyperi te all lines into your browser's URL line in order to comple "https://hsin.gc.espgroup.net/signup/verify.cfm?id*61287181	ik shown below or c te your application) PF9E511F3D0A84BD0E44 problems clicking on	

Figure 1.5 - Example of Confirmation Email





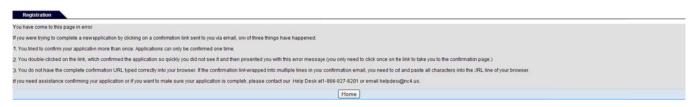


Figure 1.7 – Confirmation Error Message

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.

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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).

Collaboration Tools	Please contact the NC4 Support Center with any questions or concerns recarding this portal.
Secure Messaging (36 urrea	
Library	NC4 Support Center (877) 624-3771.
Find Users	Welcome to the ESP Group HO Community Secure Potel
Calendar	Welcome to the ESP Group HQ Community Secure Portal.
Online Briefings	This system will allow all contractors of the system to callaborate with
Forum Discussions	This system will allow all contractors of the system to collaborate with one another and with the government in a secure mode Unless specific
Survey Wizard	authorization for collaboration is given, all contractor data will
TaskTrac	remain strictly confidential to the organizations personnel who posted
Chat	it.
WebPort	
Alerts	
Channels	We hope you find this system useful as it continues to grow in
My Groups	capability for you.
Admin Tools	capability for you.
Update Profile/Preferences	
Suggestion Box	The ESP Group, LLC,
Report Problems	
Log Out	



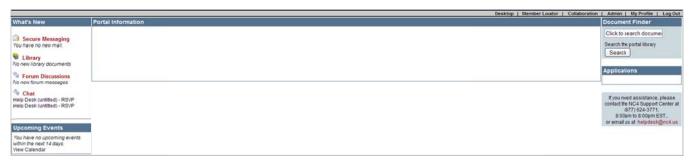






Figure 1.10 – Advanced Navigation (Upgraded Menu) Desktop

Frequently Asked Questions (FAQs)

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

Please refer to the <u>Checking for Encryption</u> 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 <u>Registration</u>.

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 <u>Step 1: Click link to Register</u>.

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 <u>Step 2: Create Username</u> and <u>Step 3: Create Password/Select Security Questions</u> 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 online 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 <u>Step 5: Confirmation</u> 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."

You have 10 alerts in your A	Verts folder.					
Alert From	Date Sent	Priority	Subject	Select All	Archive	Delete
Rice, Karla	May 3, 2010 12:08:59 PM	Low	Test		1	25
Rice, Karla	May 3, 2010 11:59:03 AM	Low	Testing please disregard			×
Cruz, Christopher	Jul 21, 2009 2:48:47 PM	High	Help Desk Training Alerts ED Eyes-Only		-	*
Cruz, Christopher	Jul 21, 2009 2:47:28 PM	High	Help Desk Training Alerts			×
auck, Christin	Jul 2, 2008 1:20:38 PM	High	HelpDesk Eyes-Only		0	25
Spain, Deanna	May 30, 2003 1:28:46 PM	High	HelpDesk		0	×
Spain, Deanna	May 30, 2003 1:26:35 PM	High	Help Desk Eyes-Only		4	25
Barlow, Diana	Apr 21, 2008 2:43:18 PM	High	test aert only!!!!		1	×
Silcox, Dan	Apr 10, 2007 9:38:13 AM	Medum	Demo Upgrade Complete		2	25
Vohlgemuth, Karie	May 11, 2006 1:57:33 PM	High	test - please disregard			×

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.

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Alerts	Compose New Alert Archive Delete Next Alert List Aler						
You have 10 alerts in your Alerts	s folder.						
Alert From		Date Sent	Subject	Date Read			
Karla Rite		May 3, 2010 11:59:)3 AM	Testing Please Disregard	May 7, 2010 12:40:45 PM			
Priority	Low						
Alert:	test						

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.
- 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.

Alerts	Alerts Compose New Alert Archived Alerts Sent Alerts Drafts Search Alert Lists Management Options
Drafts	
Address Book Orgs Users Alert List Channels Refresh Recipients: Subject Attachments:	Search (ASE Secrue Portal) (Organization) AjemianLayer (Organization) BlackFlag (Organization) Business Emergency Operations Center (Organization) Insert Recipients (<i>Ilo recipients selected. Add recipients from the Address Book list</i>) Eyes-Only? Falet notification is selected, the subject will be sent ou unencrypted To attach a file, use the 'Browse'' button to select the file, then click "Attach". Browse Stlecting Eyes-Onlywill disable the ability to add and serd attachments
Alert: Options:	 All Hands Alerr? Priority: High High Send body of alert, unencrypted, to recipients' external email address. Attachments will not the setternally. Selecting <i>Eyes-Only</i> will disable this option. Notify recipient that they have an alerb tud on ot include the subject line. Notify recipient that they have an alert and include the subject line. Send Alert notification only. Save Draft

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.

Alerts			Alerts Compose New Alert Archived A	Alerts Sent Alerts Drafts Search Alert Lists Management Options
You have 1 alerts in your A	Archived Alerts folder.			
Alert From	Date Sent	Priority	Subject	Select All Delete
Hauck, Christin	Jul 2, 2008 1:18:47 PM	Figh	Help Desk	🗆 💥
250 Y Change Sz	e			Delete Selected Alerts

Figure 1.3 – Archived Alerts Folder

Archive Alerts

- 1. Select the appropriate check box and click on the "Archive" button or click on the ¹ 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.

Are You Sure?					
Archived Alerts carnot be moved back to the Alert area.					
You have selected 1 Alert for ARCHVE.					
Archive Do Not Archive					

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.

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Alerts

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				1.0					
Alerts	Compose	NewAlert	Archived Alerts	Sent Alerts	Drafts	Search	Alert Lists	Management	Options

Alert To	Date Sent	Priority	Subject	<u>Select All</u> Delete
Rice, Karla	May 3, 2010 12:08:59 PM	Low	Test [Alert Status]	
Rice, Karla	May 3, 2010 12:00:53 PM	Low	Testing [Alert Status]	
Rice, Karla	May 28, 2008 3:01:15 PM	Low	Testing please disregard [Alert Status]	

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.

alerts in your Sent Alerts fo	Data Sent	Schiart	Data Read
Karla Rice	May 3, 2010 12:08:59 PM	Test	May 7, 2010 1:09:09 PM
Priority Low			
Alert: test			

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).

Alerts	Alerts Compose NewAlert Archived Alerts Sent Alerts Drafts Search Alert Lists Management O					
Alert Subject	t Test					
Last Issued	May 3, 2010					
Alert Leve	Low					
Responses	There are 2 Total Sent records.					
	Resend to non-responders	Resend to all recipients				
			Show	v Non-Responders Show Responders		
Name	Compartment		Status	Action Date		
HAUCK CHRISTIN	ESP Group HQ		Read	None		
RICE, KARLA	ESP Group HQ		Read	May 3, 2010 12:09 PM		

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.

 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.

Alerts		Alerts Compose NewAlert Archived Alerts	s Sent Alerts Drafts Search	Alert Lists Management Options
Alert Subject	Test			
Last Issued	May 3, 2010			
Alert Level	Low			
Responses	There is 1 Response record.			
	Resend to non-resp	onders Resend to all recipients		
			Show I	Non-Responders Show All Recipients
Name	Compartment		Status	Action Date
RICE, KARLA	ES	P Group HQ	Read	May 3, 2010 12:09 PM

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.

Alerts	Alerts Compose NewAlert Archived Aler	erts Sent Alerts Drafts Sea	rch Alert Lists Management Options
Alert Subjec	Test		
Last Issued	May 3, 2010		
Alert Leve	Low		
Response	There is 1 Non Responder record.		
	Resend to non-responders Resend to all recipients]	
			Show Responders Show All Recipients
Name	Compartment	Status	Action Date
HAUCK CHRISTIN	ESP Group HQ	Read	None

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.

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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.

You have 5 alerts in you	II Drafts folder.			
Alert From	Date Sent	Priority	Subject	<u>Select All</u> Delete
Rice, Karla	Jul 16, 2009 10:28:58 AM	High	No Subject	□ <u>×</u>
lice, Karla	Jun 3, 2009 2:10:19 PM	High	No Subject	
tice, Karla	Apr 29, 2008 3:28:30 PM	High	No Subject	
lice, Karla	Mar 17, 2008 12:47:25 PM	High	No Subject	D 💥
lice, Karla	Jan 3, 2007 9:46:35 AM	High	No Subject	



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.

Alerts		Alerts	s Compose NewAlert Archived Alerts Sent Alerts Drafts Search Alert Lists Management Options
Alert Search			
From	~		
Subject			
Content By Keyword			
Status	~		
		Se	earch

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.

				COMPLETE PORTAL U	SER G
Alerts You have 2 alerts in your A	Vert Search folder.		Alerts Compose NewAlert Archived Alerts Sent Alerts Drafts S	Search Alert Lists Management C	Options
Alert From	Date Sent	Priority	Subject	Archive	Delete
ruz, Christopher	Jul 21, 2009 2:47:28 PM	High	Help Desk Training Alerts		×
ruz, Christopher	Jul 21, 2009 2:48:47 PM	High	Help Desk Training Alerts EO Eyes-Only	0	×

Figure 1.13 - Alert Search Result

Alert Lists

NCA

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).

Alerts	Return to Alerts Create New Alert List Alert Lists
Alert Lists	
Use the Alert Lists feature tc create your own lists of users. Then use the alert list when sendin. To <i>manage</i> the users in the alert list, click on the alert list name. To <i>delete</i> an alert list, click on the "Delete" button next to the alert list's name.	ig Alerts.
Manage Users in Alert Lists	Delete Alert List
2-14-10 testing	Delete
Bulletins	Delete
client service distro list	Delete
dbtest	Delete
Diana Test	Delete
donion	Delete
dw list	Delete
HD Watch Team	Delete
High Severity Alerts	Delete
Jason's New Alert List	Delete

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.

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	COMPLETE PORTAL USER GUIDE
Alerts	Alerts Compose NewAlert Archived Alerts Sent Alerts Drafts Search Alert Lists Management Options
To create an Alert List you must first name it. Type in an alert name below, then click "Create". You will then be prompted to enter the remaining data for the Alert List.	
Alert List Name	
Create	Cancel

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 Deuton to move the user into the "Users in the Alert List" field. To remove a user, click on the Solution 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. 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. 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. 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.

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Alerts		Alerts Compose New	/ Alert Archived Alerts Sent Alerts Drafts Sea	rch Alert Lists Management Options
Alert List Name	Low Sev Alerts Select user(s) and a right before adding user(s) b th Users Not In Alert List	e Alert List. Click on the ADD ">" button or	r he "<" REMOVE button to update the Alert List Users in Alert List	contents.
Orgs Users Refresh NOLE: Only portal ma	(ASE Secrue Portal) (Organization) AjemianLayer (Organization) BlackFlag (Organization) Burton Group (Organization) Business Emergency Operations Center (Or Canadian Telecom Cyber Protection (Organ Christ Test (Organization) Christie Test (Organization) Client Services (Organization) Cornnuts (Organization) moers who share common compartments may be ad	zation)		ar list mombar. If you altowat to add a
	t can not interact with any of the existing list members	you will be provided with an error messag	eand the action blocked	
Name/Org Sponsoring Org		V		
Associations	×	<u></u>		
City				
State				
	Search			
	Finished Upda	te Alert List	Delete Alert List	Cancel

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.

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Alerts	Alerts Compose Nev Alert Archived Alerts Sent Alerts Drafts Search Alert Lists Management Options					
Alerts Management						
Select an action to build the Alert Level display you The current order and contents of the drop down	u would like. list are shownat the bottom of the s	creen.				
High		O Down One	O Delete			
Medium O Up One		O Down One	O Delete			
Low O Up One			O Delete			
	Clear Selection	update Back to Alerts				
Add New Alert Level:	At Top O At Bottom O	Add New Level				
	Current Drop Down List	Contents and Display Order High				

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.

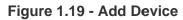
Alerts		Alerts Compose NewAlert Archived Alerts Sent Alerts Drafts Search Alert Lists Management Options		
Alert Options				
To <i>add, delete, or edit</i> To <i>select</i> a device to re To <i>edit</i> a specific devic	es feature to specify which devices Alert Notificatons shou adevice, click on the "Add/Manage Devices" buton. exerve Alerts for an Alert Level, click the checkbox that mate e click on the device name. ur primary email or secordary email address you may do s	ches up with the device name and the alert level, and click the "Finished" but	ion.	
Devices	Alert Levels			
	High	Nedium	Low	
Primary Email				
Secondary Email				
		Appy changes to all accouns		
	Cancel	ear Selections Add/Manage Devices Finished		

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).

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Alerts		Alerts Compose NewAlert Archived Alerts Sent Alerts Drafts Search Alert Lists Management Options
Add Device		
To edit a device, click on the	ne "Delete" link next to the device.	
* Device Name:		
* Device Email Address:		
	Add Device	Finished Cancel Your Devices
Device Name	Device Email Address	Edit Delete



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 <u>Create Alert Lists</u> 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 <u>Compose Alerts</u>).

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 <u>Sent Alerts</u> 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 <u>Compose Alerts</u> 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 <u>View and Delete Alerts</u> 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 <u>View and Delete Alerts</u> 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 <u>Archive Alerts</u> 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 <u>Search Alerts</u>.

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

Yes. Please refer to <u>Alert Options</u> 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 <u>Response Records</u>.

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.

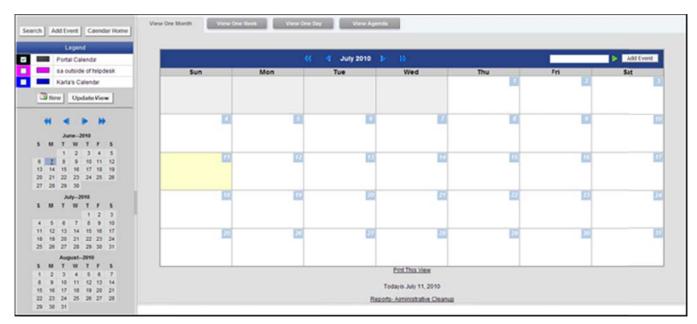


Figure 1.0 - One Month Layout

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."

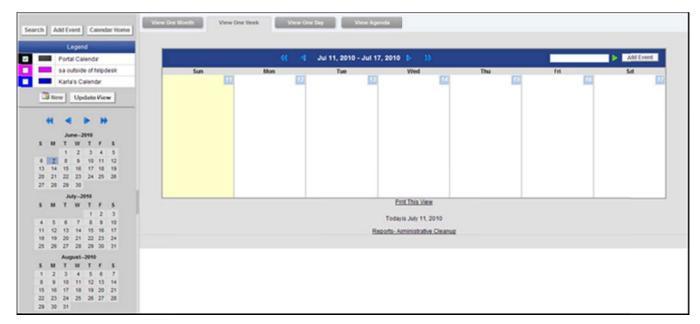


Figure 1.1 - One Week Layout

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."



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		Port	_		a .			Add Event
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		- AR 1				10	8 00 00 AM - 8 16 00 AM Tenning (Kinda's Calendars	23
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		15						
		22						
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		22						
25	- 20	27				21		
				-201				
8	M							
1	3	3	4	5		7		
15		10						
		24						
		31						

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.



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learch	A	ad (ven	0	aene	lar Home	View Dra Month View Dra Beek View Dra Day View Agenda Event Summary
			Leg				Title: class Delets Edit
		Por	tai C	alend	58		Calendar Karla's Calendar
		53	outsi	de of	Nip	lesk:	Duration: Jul 20, 2010 8:00:00 All EST - Jul 20, 2010 8:15:00 All EST
		Kar	ta's i	Caler	dar		Category: Meeting
			pri 1				Type: Non-recurrent event Display on Weekends: Yes
1	38 No	w	U	pdað	eVie	-	Sponsor:
_	-	-	-	-	-	_	Description: Other Users view other users
	44					100	Attachments: No Attachments
							Event Admin: Karta Rice, 804-744-9(30, karta.rice@nc4.us
		3		2010			
5	M	T	. 11	т	'		Retart To Calendar
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1.5	7	15	1		11		Todayis July 11, 2010
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8	9	10		1 12			
15	16			1 13			
				21	27	28	
29	- 20	31					

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.

Search Keywo	meeting	Search	
n 7, 2010 - 8:00:00 AM - 8:11:00 AM	please index me		
20, 2010 - 8:00:00 AM - 8:15:00 AM	taining		
20, 2010 - 8:00:00 AM - 8:15:00 AM	class		

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.

otal Colors		tal Colors (You have access to 3 calendar(s))
1	Blak (Default)	Calendar Name Portal Calendar
2	Blue	Description This is the calendar to which every member of the community has access.
3	Blue Green	Color Choice Color Currently Selected + 1 M
4	Deije	Calendar Name sa outside of h- elodesk
5	Dat Blue	Description
6	Dat Green	Color Choice Color Currently Selected + 3 V
7	DatRed	
	Fushia	Calendar Name Kafals Calendar
2	Gre	Color Choice Council Science - 2 V
10	Light Blue	Color Choice Color Currently Selected = 2 V
11	Light Green	
12	Pini	
13	Red	
14	Yellow	

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.

To create an event you must inst name it. Type in an event name below, then click "Create". You will then be prompted to enter the remaining data for this event.							
Name Of The Event							
Event Is For Which Calendar? Portal Calendar							
	Create Cancel						

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.

Event For Calendar: Karla's Calendar	
2012 July V 11 V 2010 V 8 V 00 V AM V EST	
Ally V 11 V 2010 V 8 V 15 V AM V EST	
Title Of Event jaining	
Description	
Sponsoring Organization	
Cutegory Of Event Meeting	
Display On Weekands? O Yes O No	
T/p4 Of Extent Non-Recurrent Recurrent Options	
Click on names in either the available users or assigned users list, then click on a direction buffon (Add >	or a Dampai to move name to the other inf
Available Users	Assigned Users
	> Rice, Karla (Help Desk)(Event Admin)
🖸 orga	
Users	O Event Admin
Users Wy Groups	
Users Users My Groups Channels	O Event Admin
Users Wy Groups	C Event Admin C Event Read Only
Users Users My Groups Channels	C Event Admin © Event Read Only
Users My Groups Channels Refresh List	C Event Admin C Event Read Only
Users My Groups Channels Refresh List	C Event Admin C Event Read Only
Users My Groups Channels RefreshList Search Search	Caurt Admin ⊙ Event Read Only Change Rights
Users My Groups Channels Refresh List Search Atachments Browse. Attach	Caurt Admin ⊙ Event Read Only Change Rights

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.

Event for Calendar Karla's Calendar			
Name Of Event training			
Event Duration Start Date July V 11 V 2010	End Date	July 11 2010	
		O No End Date	
Event Occurs O Daily O Weekly O Monthly O Annually			
Refresh Frequency Details			
Frequency Details O Even 1 week(s) or O on the 1st 2n	d 3rd 4th Last week(s) of the month		
For the following days:	Differentias Differentias		
Startog S ¥ 100 ¥ AM ¥ EST	Contraction Contraction		
Ending 8 V : 15 V AM V EST			
	Finished Upd	late Event Carcel	

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 D button to grant users access.
- 6. Select the subtron 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.



Event For Calendar: Karla's Calendar	
Ady V 11 V 2010 V 8 V 00 V AM V ES	r
End Ady ¥ 11 × 2010 × 8 × 15 × AM × ES	1
Title Of Event, taining	
Description	
Sponsoring Organization	
Category Of Event Meeting	
Display On Weekends? Yes O No	
Tipe Of Event Non-Recurrent V Recurrent Options	
Click on names in either the available users or assigned users list, then click on a direction t Available Users Orga Obsers By Groups Channels Refresh List Educh Search	vition (Add > or < Remove) to move name to the otherist. Assigned Users Change Rights Assigned Users Assigned Users Change Rights
Atachments Browse. Atlach	
To attach a file use the Attach button to select the file, then cick the	Browse button.
	Finished Update Event Delete Event Cancel

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).

Are You Sure?	
Deleting an event cannot be undone.	
Delete Cancel	

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.

Create New Calendar	
Enter The NameOf The Calendar	
Enter An Optional Description	
	(and)
	Create Cancel

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 D button to grant users access.
- 6. Click on the sutton 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.



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Assign Access: Training						
Click on names in eith	er the available users or assigned users list, then	click on a direction bullton (Add > or <	Remove) to move na	ame to the other list.		
a second second second second second	Available Us	ers			Assigned Users	
Orgs Users My Groups Channels Refresh List	503 Community (Organization) Askandia (Organization) Another level III (Organization) 8 (Organization) 8 liting Report One (Organization) 8 liting Report Sub One (Organization) 8 liting Report Two (Organization) 8 liting Report Two (Organization) 8 liting Report Two (Organization)	×11	O Calendar Admi O Calendar Read © Calendar Read	sPost	Rice, Karla (Meb Desk)[Calendar Admin]	
			Finished	Delete		

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.

Are You Sure?
Are you sure you want to detete this calendar? All eventswill be destroyed.
Yes, Delete R No, Go Back

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.

To create an event you must inst name it. Type in an event name below. Been click "create". You will than be prompted to enter the remaining data for this event.			
Name Of The Event PMP Training			
Event Is For Which Calendar? Karta's Calendar 🛩			
	Create	Cancel	ncel

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.



Event For Calendar Karla's Calendar	
5201 Ady V 13 V 2010 V 5 V 00 V AM V EST	
End Ady V 13 V 2010 V 8 V 15 V AM V EST	
Title Of Event PMP Training	
Description	
Sponsoring Organization	
Cutepoy Of Event Veeting	
Display On Weekends? Yes O No	
Type Of Event Non-Recurrent V Recurrent Options	
Click on names in either the available users or assigned users list, then click on a direction button (Add > Available Users © Orgs © Users © My Groups © Channels Refresh List Search	or < Remove) to move name to the other list.
Atachments Bowse. Atach To attach a file use the Attach lutton to select the file, then cick the Browse hu Finished	ton. Update Event Cancel

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.



Event for Calendar Karla's Calendar								
Name Of Event training								
Event Duration Start Date	July 💌 11	2010	End Date	یر 📀	ly	✓ 11 × 2010		
				O No	End Date			
Event Occurs O Daily ()	Neekty O Monthly O A	enually						
Retesh Fre	quency Details							
Frequency Details Even 1	week(s) or O on the	Stat 2nd 3rd 4th Last week	k(s) of the month					
For the following	in dars:							
		Wednesday Thursday CFriday DSa	durday					
Starting 8 💌 : 00 8	AM V EST							
Ending 8 🛩 : 15 8	AM 🛩 EST							
			Finished	Update Event	Carce	4		

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 D button to grant users access.
- 6. Select the subtron 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.

Event For Calendar Portal C	Which are a second and a second a
(Ru/	Ady v 13 v 2010 v 8 v 00 v AM v EST
End	July V 13 V 2010 V 8 V 15 V AM V EST
Title Of Even	taining
Description	
Sponsoring Organization	
Category Of Even	Vesting
Display On Weekends?	
And the second se	Non-Recurrent Placement Options
Click on names in either	he available users or assigned users list, then click on a direction button (Add > or < Remove) to move name to the other ist.
	Assighed Users Assigned Users
Real	108 Community (Organization) Alexandia (Organization)
Orgs Users	Another level III (Organization)
My Groups	I (Organization) Control Read Only Bling Report One (Organization) Control Read Only
Channels	billing Report Sub One (Organization)
Refresh List	Billing Report Two (Organization)
Search	Search Change Rights
	Sharen
Atachenents	
	Bowse. Attach Is attach a tie use the Attach lution to select the file, then cick the Browse button.
	to attach a ter use the Attach rution to select the ter, then oct the terrores post-
	Cancer Contraction Contraction Contraction

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 <u>View Calendar Layouts</u>).

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 <u>View Calendar Events</u>).

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 <u>View Calendar Layouts</u>).

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 <u>Add Event To Portal Calendar</u>). For private calendars, users with "Calendar Admin Access" rights can post event (refer to <u>Create Private Calendars</u>).

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 <u>Recurrent Event</u>).

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.

Oanneis	Li Li
Sans .	Type Status Hits Subscribe Ed
A	Sites Si
Help Desk	Sponsoring Organization Buitscribed Off
Jens by request now with an really long name	ByRequest Unsubscribel Of 😥 Ed
Jens private channel	Private Unsubscribed Oft 🕑 Ed
Bevel's Karep a Channel Open	Open Subscribed Of 🔒 Ed
Beve's Private Channel	Private Unsubscribed Off 🤗 Ed
Steve's Request Only Channel	By Request Inactive Ed
shoa Private Channel	Phone Subscribed Of 🔒 Ed
thos by request channel	ByRequest Subscribed Qs 🔒 Ed
thea spen channel	By Request Dubscribed Of 🔒 🔒
new by request channel until another is created	By Request Unsubscribed Oft 😥 Ed
new open channel until another is realled	Open Unsubscribet Off 😕 Ed
new private channel until another is created	Phate Unsubscribel Of 😥 Ed

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 kin, 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 *lab* button to unsubscribe to the channel.
- 2. A user has successfully unsubscribed to the channel when the subscribe button is 2, 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).

Compose block (1)	Delete Move Mark Read Mark Orwad			
Sent Mal	Priority		Subject .	EnterTane (LST)
💭 Drafts	Normal	Karla Rice	Example of message	204 PB
⊘ Drafts	Select Al None Baad Unread Delete Move Mark Read	MarkUnwaaf		1.1 of 1
Personal Felders				

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.

Send Mail Save Datt Discard
Address Book
Ø Orgs Ø Users Ø MyGroups Channels Search
Messace Throtting Enabled @
508 Community (Organization) 1 508, 508 (508 Community) 1 508, 508 (Community Level II) 508, 508 (Help Dexk) 508, 508 (The Clearing House) ×
⊙ To: ○ CC: ○BCC: • Add Recipient(s)
Message
Şubjet
Attach Fie: Browse. Attach
Font family - Font sze - 🔬 - 💇 - 🖽 🗐 🕐 🖈 - 🛅 🗐 🛞 🖓 🏠
A
Security Settings
Priorty: Medium
Message Type: Normal
Notification Options: with external notifications
Send Mail Save Braft Discard
Terrene and the second se

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 <u>Channels Information</u>.

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 Debutton to subscribe to an open channel. Refer to section <u>Subscribe to Channel</u>.

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 <u>Access to By Request Channel</u>.

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 <u>Channels Information</u>.

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).

Chat		
Name Of Cha	at: Threat Level Dis	ission
Click on names in one	box or the other, then click on a direction	tton (Add > er < Remove) to move names to the other group.
	Available Use	s Assigned Users
 Orgs Users Channels Logged In 	Help4Desk (Organization) Orgarization125396 (Organization) Orgarization125397 (Organization) Orgarization125398 (Organization) Orgarization125398 (Organization) Orgarization125400 (Organization) Orgarization125400 (Organization) Orgarization125402 (Organization) Orgarization125403 (Organization) Orgarization125403 (Organization) Orgarization125404 (Organization)	Rice, Karla (Organization 125396)[Admin] Notify Users? Admin Participant View Only
Search:	Search	Show users with these rights Refresh Change Rights > Modify righs to assigned selection. Participant View Only
		Finished Update Celete

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 subtron 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.

	Threat Level Discussion		
on names in one box or the oth	er, then click on a direction button (Add > or < F	Remove) to move names to the other group.	
	Available Users		Assigned Users
Orgs Users Channels Logged In Refresh List		 Notify Users? Admin Participant View Only 	Rice, Karla (Organization125396)[Admin] User125461, Test125461 (Organization125396)[Participant]
Search: user125461	Search	Change Rights >	Show users with these rights Reflesh

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.

Are You Sure?	
You are about to delete the chat room - (Threat level Discussion Deleting a chat room can not be unione.	
Celete Cancel	

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).

Chat			Create New Chat Room
Room List Participants	Logged In	Threat Level Discusson	॥ 🐒 🖬 🚨 🗃
Name	Actions		
Karla Rice (Employer Name:)			
Karla Test	۶		
		Enter Message	
			×
		Post	

Figure 1.4 - Chat Room

Chat			Create New Chat Room
Room List Participants	Logged In	Threat Level Discussion	II 🔊 🖻
		Karla Rice (12:14:25 PM) Hello There, I see you have view only access! I will be posting information for you to view.	
Name	Actions	Heno mere, i see you have wew only access i will be possing information for you to view.	
Karla Rice (Employer Name:)	9		
Karla Test			

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).
- 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).

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Chat			Create New Chat Room
Room List Participants	Logged in	Threat Level Discussion	II 🔊 🗅 🚨 🥑
Name	Actions	Karla Rice (12:20:33 PM) Hello there Karla! Reaéy to chat?	ж
Karla Rice (Employer Name:)			
Karla Test	9 G		
		Enter Message	
			× *
		Post	

Figure 1.6 – Sidebar Chat Invitation

Chat		
Chat with Karla Test		2
Karla Rice (12:22:12 PM) Hello		
•	m	•
Enter Message		
		*
		-
	Post	

Figure 1.7 – Sidebar Chat



Chat	
Kohat with Karla Rice (Employer Name:)	
Karla Rice (12:24:36 PM) Your invitation has been declined	
Enter Message	
	_
	:
Post	

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.

History Length:		Refresh Page
Karla Rice (10/28 Hello there Karla	48 hours	?
	72 hours Complete	<u>close window</u>
	Complete	<u>close window</u>

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.

N		
Threat Level Dis	cussion	
Owner:	Rice, Karla	
Created:	October 28, 2011	
First Post:	October 28, 2011 12:20 PM	
Last Post:	October 28, 2011 12:20 PM	
Posted:	1 Messages	
Currently Invited		
Rice, Karla (Orga	anization125396) (admin)	
Test, Karla (Organization125396) (view only)		
User125461, Tes	st125461 (Organization125396) (participant)	
	close window	

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 <u>Create Chat</u> 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 <u>Post Message</u>.

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 <u>Delete Chat</u> 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.
- 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).
- 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).

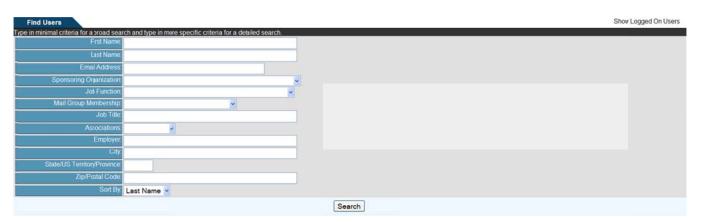


Figure 1.0 – Find Users Screen

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.

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	s) 1 - 2 of 2			Show Logged On Users
Type in minimal criteria for a broad s	search and type in more specific criteria for a deailed search.			
		Search Again		
Name		Organization		
-				
Vame.	karla tester 📑	Sponsor:	Georgia Training	
Emait	karla.rice@nc4.us	Employer:	Employer Not Provided:	
Phone Nimber:	804-744-8800			
Name:	karla tester 🛄	Sponsor	KarlaTesting	
Emait	karla.rice@nc4.us	JobFunction:	None Selected	
	804-744-8800	Employer:	Employer Not Provided:	
Phone Namber.	004-144-0000	Linpoyer.		
		Search Again		



	ch returned 0 results	Show Logged On Users
Type in minimal criteria for a broad sea	rch and type in more specific criteria for a detailed search.	
Frst Name		
Last Name:		
Emai Address		
Sponsoring Organization		
Job Function		
Mail Group Membership	×	
Job Title		
Associations		
Employer		
City		
State/US TerritoryProvince		
Zip/Postal Code:		
Sort By	Last Name 🖌	
		Search

Figure 1.2 – Return 0 Results

Send Secure Message

The envelope symbol in 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.

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Secure Mess	aging
Address Book Orgs Users My Groups Channels	(IASE Secrue Portal) (Organization) AjemianLayer (Organization) BlackRag (Organization) Burton Group (Organization) Business Emergency Operatons Center (Organization)
Refresh	Search
	◎ To: ○ CC ○ BCC: Insert Fecipients
To:	tester, karla (Georgia Training)[To]
Subject:	
Attachments:	To attach a file, use the " Browse " button to select the file, then click " Attach ". Browse Attach Selecting <u>Syse-Only</u> will disable the ability to add and send attachmens.
○ High [®] Me	aum C Low
Message type:	
Normal	× @
Send Message Se	ecurely @
with extendifications	ernal with external notifications and Subject without external notifications
Send Copy of Me	ssage Non-Securely 🝘 (Message will also be sent to recipients portal inbox)
As regular	email (Atachments will not be sent externally)
	Send Save Draft Scell Check

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.

Users Logged In	Record(s) 1 - 1 of 1	Find U	lsers
Users currently logged into the	e system		
Name / Phone Number / /	ssociation	Sponsor / Employer	
Name	Rice, Karla	Sporsor ESP Group HQ	
Phone Number	804-744-9630	Employer:	
Association			

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

Foru	m(s) 1 - 25 of 28 Next			Forums with acti	vities in the las	st ALL 🛩 da	ays (<u>s</u>	how all
	Forums	Threads	Threads Post L		Users	Subscribe	Edit	Delete
0	"Help Desk" Training	1	1	5/30/08 11:55 AM by <u>Deanna Spain</u>	2			ত
0	Aimee	0	0		2			0
0	Barlow Training to train new Users	2	4	1/9/09 1:13 PM by Diana Barlow	2		2	•]
0	Code Push Slide ciscussion	2	10	1/17/06 5:06 PM by <u>Ryan Johnson</u>	1			ত
	Demo Forum Suggestions This forum is for Demo Users to offer suggestions	1	1	1/10/02 3:11 PM by <u>William Potvin</u>	2			ত
0	ESP Development Priorities A Place to discuss suggestions for new functions and fixes.	17	75	9/25/08 9:05 AM by Diana Barlow	1			ত

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.

Forum Discu	ussions	Forum Home Search My Forums Options
Forum N Forum Descri		(Optional)
	either the available users or assigned users list, thenclick on a direct Available Users	
C Orgs	(IASE Secrue Portal) (Organization) AjemianLayer (Organization) BlackFlag (Organization) Business Emergency Operations Center (Crganization) Canadian Telecom Cyber Protection (Organization) Christ Test (Organization) Chersite Test (Organization) Clent Services (Organization) Cornnuts (Organization)	Notify Users?
Users Channels Refresh List Searc	b Search	Show users with these rights Admin Create Thread Post Replies Attach Fies View Only Change Rights Refresh

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.

	Ī
64	1

Forum Discussions Forum Home Search My Forums Options Create Foru								a Forum
Fors	am(s) 1 - 25 of 28 tiest			Forums with acti	vities in the las	ALL	days (show all)
	Forums	Threads	Post	Last Post	Users	45	e Edi	t Delete
0	<u>'Heb Desk'</u> Training	1	1	5/30/08 11:55 AM by Deanna Spain	-	30 15	2	ত
0	Aimee	0	0		1	ALL		9
0	Barlow Training to train new Users	2	4	1/9/09 1:13 PM by Diana Barlow	-		2	9

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

Un-Subscribe

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

foru	m(s) 1 - 25 of 28 <u>tiest</u>			Forums with acti	vities in the las	ALL 🖬 d	ays (s	how all
	Forums	Threads	Post	Last Post	Users	Subscribe	Edit	Delet
0	<u>"Help Desk"</u> Training	1	1	5/30/08 11:55 AM by Deanna Spain	2	2		•
0	ESP Development Priorities A Place to discuss suggestions for new functions and fixes.	17	75	925/08 9:05 AM by Diana Barlow	1			9

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 si 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).

	Forum Discussions			Forum Home Searc	th My Forums	Options	Create	Forum	
Fors	m(s) 1 - 25 of 28 ties	The page at https://demo.esportals.com.ays:	Forums with activities in the last ALL v days (show all)						
	Forums	Are yousure that you want to delete?	Post	Last Post	Users	Subscribe	Edit	Delete	
0	<u>"Help Desk"</u> Training	OK Canod	1	5/30/08 11:55 AM by Deanna Spain	1	2		9	

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.

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Im Home Search My Forums Options

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.

Forum Discussions	Forum Home Search My Forums Option
Posting In: Forum Home > "Help Desk" > Training	
Post Title: Training	
виц	
Subscribe to this Thread	
 Notify me of replies to this post 	
Attachment: Browse Add	
	Preview Post Submit Post Cancel



Forum Discussions		Forum Home Search My Forums Options
Posting In: Forum Home > "Help Desk" > Training		
Post Title: Training		
B / U		
The training will last approx 1 month		
Notify me of repliesto this post Attachment. Browse Add		
	Preview Post Submit Post	Cancel
Preview Training The training vill last approx 1 month		

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.

Forum Discussions	Forum Home Search User hfo My Forums Options Add Three			Thread	
Forum Home > "Help Desk"	Posts	Last Post	Subscribe	Edit	Delete
Iteas for Training	1	5/14/10 11:47 AM by <u>Karla Rice</u>			
Help desk thread just for training	1	5/30/08 11:55 AM by <u>Deanna Spain</u>			

Figure 1.8 - Thread Title

Forum Discussions		Forum Home Search User hfo My Forums Options Add Thread
Forum Home > Thread >	> Post	
View Flat		
Training - Karla Rice - 5/	14/10 11:47 AM NEW	
Forum Home > "Help [Desk" > Training	
Posted By	Post	
		Reply Quote Print This Message
Karla Rice 5/14/10	Training	
11:47 AM	The training will last approx 1 month	

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."

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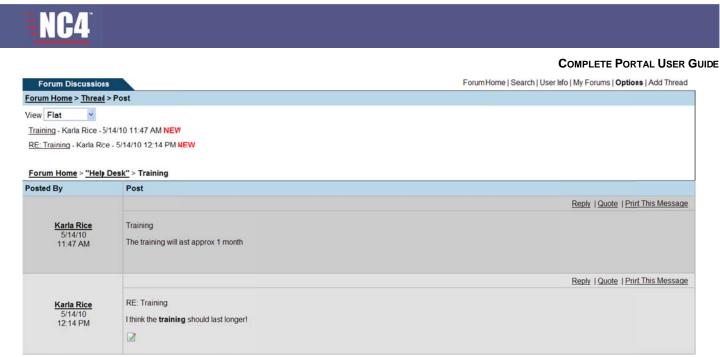
- 3. Provide the "Thread Summary."
- 4. Click on "Create Thread."
- 5. Change the "Post Title."
- 6. Click on either **B** for bolding, I for italic, and/or \underline{U} for underlining (see Figure 1.7).
- 7. Provide the text in the pop-up window (see Figure 1.10).
- 8. Click on the "OK" button located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

Forum Discussions			The page at https://demo.espo	rtals.comsays: 🔯	Forum Home Search My Forums Options
Posting In: Forum Home Post Title: RE: Trainng B I U	> <u>"Help Desk"</u> > Training		Bold text	ncel	
	ng should last longe	r!			
 Subscribe to this Threa Notify me of repliesto t 					
Attachment:	Browse	Add			
			Preview Post Submit F	Post Cancel	

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

Forum Discussions				Forum Home Search My Forums Option
Posting In: <u>Forum Home</u> > <u>"Help Desk"</u> > Training				
Post Title: RE: Trainng				
B / U				
I think the [b]training[/b] should last longer! Subscribe to this Thread Notify me of replies to this post				
Attachment: Browse Add				
	Preview Post	Submit Post	Cancel	
Preview RE: Training I think the training should last longer!				

Figure 1.11 – Preview Post





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).

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Forum Discussions	Forum Home LSearch LMv Ecrums Optio
Posting In: <u>Forum Hone</u> > <u>"Help Desk"</u> > Training	File Upload
Post Title: RE: Trainng	AdministerGuides
B / U	Document Core Tool-User Guides RDFs ESP - Dialing Internationally 1.1 DefAd5 ESA Guides Internet Hone Down Procedures 1.1 Desktop ESA Guides Internet Hone Down Procedures 1.1 Desktop ESA Guides Internet Hone Down Procedures 1.1 My Document Infortak Internet Hone Down Procedures 1.1 Were Core Tool Guides Internet Hone Down Procedures 1.1 Desktop Infortak Infortak My Document Infortak Infortak Mew Core Tool Guides Track-tprocedure Deskinginternationally Internet Hone Down Procedure
Subscribe to this Thread Notify me of repliesto this post Attachment Attachment Attachment Attachment	File name: Image: Comparison Open My Network Files of type: All Files Image: Cancel
Attachment: Add Preview Pos	



Forum Discussions	Forum Home Search My Fcrums Options
Posting In: Forum Home > "Help Desk" > Training	
Post Title: RE: Trainng	
B / U Hierarchy Training on Monday	
 Subscribe to this Thread Notify me of repliesto this post 	
Attachment: Browse Add - hierarchy.doc Remove	
Preview Post Submit Post Cancel	

Figure 1.14 – Document Attached

Forum Discussions		Forum Home Search User Info My Forums Options Add Thread
Forum Home > Thread	> Post	
View Flat		
Training - Karla Rice - 5/	14/10 11:47 AM NEW	
RE: Training - Karla Rice	e - 5/14/10 12:14 PM NEW	
RE: Training - Karla Rice	e - 5/14/10 12:34 PM NEW	
Forum Home > "Help	<u>Desk"</u> ⊳ Training	
Posted By	Post	
		Reply Quote Print This Message
Karla Rice 5/14/10 12:34 PM	RE: Training Hierarchy Training on Monday Attachments: <u>hierarchy.doc</u>	



Edit/Delete Thread

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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).

Forum Discussions	Forum Home Search I	Jser Info My Farums Option	s Edit This Forum	Add	Thread
Forum Home > Karlas Forum	Posts	Last Post	Subscribe	Edit	Delete
m My thread	1	5/17/10 12:04 PM by Karla Rice			ত



Forum Discussions	Forum Home Search My Forums Options
Posting In: Karlas Forum > New Thread	
Thread Name": My thread Thread Summary: Move to Forum:	
select a forum Y Required	
Update Thread Ca	ncel

Figure 1.17 – Update Thread

Forum Discussions	The page at https://demo.esportals.com says:	Forum Home Search	User Info My Forums Optio	ns Edit This Forum	Add	Thread
Forum Home > Karlas Forum		Posts	Last Post	Subscribe	Edit	Delet
	Are you sure that you want to delete? OK Cancel	1	5/17/10 12:04 PM by Karla Rice	2	2	ত

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).

Forum Discussions		Forum Home Search User Info My Forums Options Add Thread
Forum Home > Thread > Fo	əst	
View Flat		
My thread - Karla Rice - 5/17	/10 12:04 PM NEW	
Forum Home > Karlas For	<u>rum</u> > My thread	
Posted By	Post	
		Move Reply Quote Print This Message
Karla Rice	My thread	
5/17/10	My Post	
12:04 PM	ing room	

Figure 1.19 – Move/Reply/Quote Thread

rum Discussion

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Forum Home	Search	My Forums	Options
------------	--------	-----------	---------

Torum Discussions	
Posting In: <u>Forum Hone</u> > <u>Karlas Forum</u> > My thread	
Post Title: RE: My thread	
BIU	
Subscribe to this Thread	
Notify me of replies to this post	
Attachment: Browse Add	
Preview Post Submit Post	Cancel



Forum Discussions	Forum Home Search My Forums Options
Posting In: Forum Home > Karlas Forum > My thread	
Post Title: RE: My thread	
в / <u>U</u>	
I want to preview my post	
 Subscribe to this Thread Notify me of replies to this post 	
Attachment: Browse Add	
	Preview Post Submit Post Cancel
Preview	
RE: My thread I want to prevew my 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.

Forum Discussion			Forum Home Search User Info My Forums Options Add Thread
Forum Home > Threac >	Post		
View Flat			
My thread - Karla Rice-	5/17/10 12:04 PM NEW		
Forum Home > Karlas	; Forum > My thread	Karias Forum	
Posted By	Post		
			Move Reply Quote Print This Message
Karla Rice 5/17/10 12:04 PM	My thread My Post		

Figure 1.22 – Move/Delete Post

Forum Discussions	Forum Home Search My Forums Options
Posting In: Forum Hone > Karlas Forum > My thread	
Post Title: My thread	
Step 1. Select the targe Forum: select a forum	
select a forum	
Karla's New Forum Karla's next test testk	Continue Cancel



Forum Discussions	Forum Home Search My Forums Options
Posting In: Forum Hone > Karlas Forum > My thread	
Post Title: My thread	
Step 1. Select the targe Forum: Karla's next test	
Step 2. Select an existing Thread: select a thread Y or Create a new Thread:	
Welcome	Nove Cancel

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 Mutton 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).



Forum Discussion	s		Forum Home Search User Info My Forums Options Add Thread
Forum Home > Thread	> Post		
View Flat			
My thread - Karla Rice-	5/17/10 12:04 PM NEW	The page at https://demo.esportals.com says:	
<u>RE: My thread</u> - Karla Ri <u>Forum Home</u> > <u>Karla</u> :	ice - 5/17/10 12:45 PM NEW s Forum > My thread	Are you sure that you want to delete? OK Cancel	
Posted By	Post		
			Move Reply Quote Print This Message
<u>Karla Rice</u> 5/17/10 12:04 PM	My thread My Post		
			Move Reply Quote Print This Message
Karla Rice 5/17/10 12:45 PM	RE: My thread Test		

Figure 1.25 – Delete Confirmation

Quote

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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.

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Forum Discussions	Forum Home Search My Forums Options
Posting In: Forum Hone > Karlas Forum > My thread	
Post Title: RE: My thread	
B / U	
This is my quote	
Karla Rice wrote: > Test	
Subscribe to this Thread Notify me of replies to this post Attachment: Browse Add	
Preview Post Submit Post	Cancel
Preview	
RE: My thread This is my quote Karia Rice wrote: > Test	

Figure 1.26 – Preview Quote

Print Message

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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.

Forum Discussion	5	Forum Home Search User Info My Forums Options Add Thread
Forum Home > Thread	> Post	
View Flat		
My thread - Karla Rice-	5/17/10 12:04 PM NEW	
RE: My thread - Karla R	ice - 5/17/10 12:45 PM NEW	
Forum Home > Karla	s Forum > My thread	
Posted By	Post	
		Move Reply Quote Print This Message
Karla Rice 5/17/10 12:04 PM	My thread My Post	



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).

For	rum Discussions	Forum Home Search My Forums Options Create Forum
Forum C	Options	
Notifica	ation Options	
	Notify me of threads created in my subscribed forums	
	Notify me of Fosts created in my subscribed threads	
View of	ptions	
View Th	nreads:	
Flat	×	
		Update Preferences Carcel

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.

Forum Discussions	<u> </u>	Forum Home Search My Forums Options
Search Forums		
Keyword(s):	☉ Title Only ○ Title and Text Not older than 60 v days old	
Search which forums: Search ALL "Help Desk" Aimee Barlow Training Code Push Slide discussion		
	Search Cancel	

Figure 1.29 – Search Forum



Forum Discussions		Forum Home Search My Forums Options
Search Results	1999) 	
"Help Desk" > Test		
Poster	Post Summary	
Karla Rice 5/17/10 12:02 PM <u>0 replies</u>	Test test <u>go</u>	

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 <u>Section 3 -</u> <u>Create Forum / Manage Access</u> 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 <u>Add/Edit Threads</u> 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 <u>Posting</u> <u>Messages</u> 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 <u>Section 6- Delete Forum</u> 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 <u>Delete Thread</u> 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 <u>Adding Attachments</u> 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 <u>Notification</u> <u>Options</u> 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.

My Groups	Groups
To create a group, you must find name it. Type in a name below, then click "create".	
Enter the name of the Group Create	
1181 Bhis Group be shared withother Portal Members? Yes, it will be shared \Box	
Cancel	

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 solution 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.

My Groups			Groups
Group Name	Support Team	Shared?	
	(liste: That changing to Shared and Back a	gain will reset Group Membership)	
Description			
		ck on names in one box or the other, then click on a direction button (Add > or < Remove) to move names to the other group.	
	Users No	the Group Users in List	
	500, 500 (500 Community) 500, 500 (500 Deck) 500, 500 (help Deck) brazil brazil (help Deck) chile, chie (help Deck) cort, jen (help Deck)		
Search	Search		
		Finished Update Group Membership Delete Group Cancel	

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.

NC4	
	COMPLETE PORTAL USER GUID
My Groups	Groups
To create a proop, you must first name it. Type in a name below, then click "create". Enter the name of the Group Shared Example Create	
Nill this Group be shared withother Portal Members? Yes, it will (<u>Post Group Name</u>) Cancel	

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 D 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 solution 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.



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My Groups			Groups
Group Name	My Shared Group	Shared?	
	(liste: That changing to Shared and Bac	ok again will reset Group Membership)	
Description			
		Click on names in one box or the other, then click on a direction button (Add > or < Remove) to move names to the other group.	
	Usera	Not in Group Uters in List	
	508, 508 (508 Community) 508, 508 (community Level II) 508, 508 (community Level II) 508, 508 (NC4) 508, 508 (NC4) agenta, charles (NC4) argentina, charles (NC4) prazi, brazi (Help Desk) brazi, brazi (Help Desk) cort, jen (Help Desk)	Admin User Only	
By default, new users are ad Search	did as BOTH members and users, mea	ning they can use the group and are a member. Select "User Only" if the selected users are to USE the group for "Sending" purposes and NOT be a member/lecipient.	
		Finished Update Group Membership Delets Group Cancel	

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



My Groups							Groups
Group Name Meta Group							
Description							
	META Tigs					Mail Group Members	
Operator Search Tag	No Search Criteria Defined.	Search Value	Order	Action	4		
Add New Search Oriteria					-		
- Select a Tag - 💌 🍽			1 *	Θ	1		
	Finished	Update Group	Delete Group	Cancel			

Figure 1.6 – Assign Parameters

My Group	78								Groups
	Group Name	New							
	Description	100							
			META Tigs			-		Mail Group Members	
Oper also	f Search Tag		Search Value		Order	Actions		cort, jen (Help Desk) (User)	
-	Age	25-39			1	20	E)		
Add New Sea	ch Criteria								
And M	Hair Color	Red Drown D Bla	ck 🗌 White 🗌 Burgundy		2 💌	• •			
			Finished	Update Group	Delete Group Car	scel			

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 Market button to edit the search value of the Tag (see Figure 1.7).
- 4. Click on 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 <u>View Existing Groups</u> 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.

learch category	All My Documents						
Documents 👌 New Documents	Search Sho	ABCDEFGI	HIJKLMNOPQRST	UVWXYZ			
Public Library Categories 🗳 Serv			1.10 of 38 Documents	Operpage 🖌 Submit 🔉 🔉			
ep 10 Public Documents	NameDescription	tile hoe	Category	Owner	(Steeled)	Size (Dynes)	Downloads -
Fishce HD pub	koat histoending approval	plain	Rhoahd.gub.11508 (Public)	phan, thea	5(27/10	99	
Rihoa1 public target Bhd Ridder	Atosta	3040	Nhoa hd ave 11508 (Public)	pham, khoa	5/27/10	64,238	5
Esteve's public enstant/fiest	Marca area M	plain	Mittal HD pub (Public)	pham, khoa	80510	2,100	3
PS off test Adv 29 2010	A khoa tu-kac wat	3940	Rhoahd.pub.11508 (Public)	pham, khoa	5/27/10	216,947	2
Geefa 6/22	A heat 1	32+9	Mitoal autoclarad (Public)	phant, khoat	70610	31,402	2
keefe test khoa hd pub 11508	A 1008 Not	plain	Public) (Public) (Riboa HC public)	pham, khoa pham, khoa	7(27/10	22	2
koe hd pt	A doc.1	prase	Public	phan, thea	829.70	2,705	*
BacBook Public Virvana	Athos1880.2	jp+g	MIDDAHD.pub (Public)	pham, khoa	82610	154,483	2
SUB FOLDER TEST -	A ROAT NOT	plain	thoshd pub 11508 (Public)	pham, khoa	5/27/90	2,110	1
est with KP	A Mail and rea	jp+g	Hhoa hd pub 11508 (Public)	phan, thea	5/27/10	83,564	1
per boen por right Phote Library Categories @ Should Course the Martins Fidder Month12 Month12 Month13 Head Course Head Solid							

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

Library								
Al Categories	Terrorenter (Freise Section 1) Section 21 Se							
	2 Documents) matched your search offena.							
 Dearch category 	Name	In Category	Uploaded By	Date Uploaded				
실 Wy Documents 💍 New Documents	A Keels HD PUR ALC	Keels.5/22	raibie, keefe	622/10				
 Public Library Categories 	A Keels HC PUB. doc	Keels.5/22	raible, keefe	6/22/10				
Top 10 Public Documents			New 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.

All Categories All Categories Search Category My Documents New Documents	All My Documents		11 J K L M N O P Q R S T	UVWXYZ	-	_	-
Public Library Categories				Operpage 👻 Submit 🕞 🕞			
Top 10 Public Documents	Name Description	File Table	Category	Owner	Uptowled	Size (Dytes)	Downloads - v
Riboa HD pub	A hast hat second as a second	plain	Khoa hd pub 11508 (Public)	pham, khoa	5/27/10	99	6
White Public target @hd tuider	Atata	30+g	Khoa hd pub 11508 (Public)	pham, khoa	5/27/10	64,238	5
Esteve's public	A sta group M	plain	RosaHD.pub Public	pham, khoa	80510	2,160	3
jenstestifiest JS off test	A think has	3940	Public Public	pham, thea	5(27/10	215,347	2
July 29 2018 Koola 6/22	alasta .	1040	Bhoat autoic tarael	phamit, khoait	705/10	31,402	2
keefe test	Autoa ber	plan	Mitral avdic larget	pham, khoa	7/27/10	22	2
khoe hd pub 11508 koe hd pt	Added 1	plain	MittoaHC pub aub	pham, khoa	82510	2,705	2
MacRook Public Novana	Annal 1992.2	3040	Public Public	phan, thea	80610	154,483	2
SUB FOLDER TEST -	A toat	plain	Moahd aub 11508 Public	pham, khoa	6/27/90	2,160	1
test wilk test with KP	A Mail Heat rea	3040	Khoa hd pub 11508 (Public)	pham, khoa	5/27/10	83,564	1
you know your right Prinsels Ubrary Calegories Prinsels Ubrary Calegories Prinsels Folder Mona1112 Mona1112 Mona1113 channel Issic Channel Issic Channel Issic Channel Issic Channel							

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 <u>Section 4 – New Documents</u> for additional information.

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Library Al Categories Evidence at a thread	Reve Securitaria	Decuments Or Internet					
Bearth category Jo Documents Trave Documents	New Documents (Drily returns documents that yor h		aan been posted within the last week) GHIJKLMNOPQRS	TUVWXYZ			
 Public Library Categories 				ts 10 per page 💌 Subinit			
Fig 13 Public Documents	Allow Conservation	plain	Mittal HQ and (Public)	phan, khoa	826/10	2,160	Downloath - V 3
Rhoart public target Ghd tokler	A dist.1	plain	MittahD pub tub (Public)	phan, khoa	62510	2,795	2
estevr's public involvestment	A thost 690.2 [triter starth text]	3940	PhostQ pub (Public)	pham, khoa	82510	154,483	2
😡 JS off test	A shoa1 BRO	3942	Public Public (Public)	pham, khoa	825/10	67,741	1
 July 29 2010 Koefe 5/22 	A deat leat for main funder	maword	BUB FOLDER TEST - Public	rable, keefe	825/10	24,064	•
koefe test koa hd pub 11508	Alast	maword	Stated Orbert	raible, keefe	82570	24,064	0
😡 koe hd pt	unicode M unicode br	plain	RIDGAHO BUD (PVDHC)	pham, khoa	82510	7,439	
Brance Brance Stell FOLDER TEST Stell FOLDER TEST Stell W/C test wir/C test wir/C							
Harling to Private Deconvertation Harling to obser Khoet112 Khoet113 channel Inst Channel Inst Channel Inst Channel Inst Channel							

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.

All Categories Education	Realization Papeler Decements	Deserved of Adapted	o 13 Public				
) Search calegory	Top Ten Public Documents	File Type	Category	Owner	Uphradiat	Size (Dyles)	Downleads
Wy Dotuments 👌 New Documents	A sust hust pending suprovat	plain	Moa.hd.aub.11508	pham, thea	6(27/10	10	6
• Fublic Library Categories 🖉 New	A handa	3140	870a.hd.pub.13509	pham, khoa	5/27/95	64,238	6
Top 10 Public Documents	A sta group M	plain	Mhoa HO pub	pham, khoa	82670	2,190	3
when the state of	A sheats in star	32+9	Maa.hd.aub.11508	pham, khoa	527.10	216,347	2
esterv's public	A hold	3245	fitoa1.public.tarael	pharet, khoat	70610	31,402	2
investment interview	A thus	plain	Mhoa1 public targed	pham, khoa	202/10	22	2
JS of test July 79 2010	A Most BRO 2	342	fithoshQueb	pham, khoa	825/10	154,483	2
Koeh 622	A.dot.1	plain	Rhoa HC and and	pham, khoa	805/10	2,715	2
koefs test khoa hd pub 11508	A leaf	30+0	Hoahd pub.11008	pham, khoa	\$427/90	83,564	1
koa Mpt Hactook Public	A heat	plain	blog hd pub 11508	pham, khoa	5/27/93	2,160	

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.





Library - Marlas Folder					Manage Access View Acces	ss Manage Forder View Forder
All Categories	here becoments Papalar Decar	Becks Falle				
🕤 Search calegory 📑 Search netadata	D Matesfelder					
🔑 My Documents 💍 New Documents	Download History					
Public Library Categories	The Defails Name Description	File Type	Owner	Date Upksaded	Size (Byten)	Countineds
Top 10 Public Documents	A Automat 2012 August 2010	application/moword	Karla Rice	83010	1,372,100	1
G Ritos ID pub D Ritos 1 public target	Person Downloading Karla Rice	Employer Name ESP Group	Time of Last 0 8/30/10 – 12.4		Times Downloaded	
O BELINC SHA			Batturn to Folder Listing Dov			

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.

Library - #Karlas Folder	View Folder
All Categories	Terre Socialises Payments Deciminants (Literated Harles Fulder
) Bearch calegory 🎯 Bearch netadata	C Resultater
🔑 Wy Documents [1 New Documents	Are You Sure?
Public Library Categories Show Public Documents	
Coghaned Content Deeded	Deleting a Dournert cannot be undone.
 #Ahoa HD pub #Ahoa 10 public target 	Delete Do not delete

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.
- 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

Library	
All Categories Educed or amount	New Incoments Papers Incoments Recomments Of Internet
👌 Search category 🎯 Search netadata	To create a celepony you must find name 8, Typi III a celepony name below, then clob. "Create."
실 My Documents 💍 New Documents	
Public Library Categories	Crate Cancel

Figure 1.10 - Create a Category Name

Library - IKarla's Public Feder		Manage Access View Access Manage Folder
All Callegories I Factors of Entertaint	Investments Papeler Decements Discussers Of Internet Mark's Public Falls	
👌 Search category 🎯 Search netadata	Warses Public Forder	💋 Create Sub-Adder 🙀 Add to FOX 👔 Upload Document 📑 Bulk Upload
🔪 My Documents 👌 New Documents	There are no documents in this category	
 Public Library Categories 		

Figure 1.11 – View Public Category



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).

Library - RKarla's Public Foder	
All Categories	New Documents Payaker Documents (Februaries (Februaries Februaries)
🚡 Search category 🎯 Search netadata	Te prude a deligory you must find name 8. Type m a celegory name below. Ben club "Onule."
🔑 My Documents 📩 New Documents	Name Of Calibyay
Public Library Categories	Croze Cancel
Crop 10 Public Documents	

Figure 1.12 – Create Sub-Folder

Library - Auguest Subfolder	Manage Access View Access Manage Folder
All Categories	New Secondary Republic Secondary Disconding Appart Molder
🕤 Search category 🎯 Search netadata	New Folder, Auguest Subfolder, has been created.
🔑 My Documents 💍 New Documents	🖓 Auguest Duddster 😪 🖓 Orade Sub-Noter 🖕 Add to For 🖹 Upload Dournest 🖹 Built Upload
 Public Library Categories 	
Top 10 Public Documents	There are he focuments in this calegory

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 <u>Section 3 – Folders of Interest</u>.

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.

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Library - Auguent Subfolder		Manage Access View Access Manage Forder View Forder
All Categories	Aver Documents Papale Documents Documents (Classical August Subhaber	
🗋 Search category 🍓 Search netadata	Auguest Statistier	a .
	ibrary Upload	
 Public Library Categories 	UNCI	LASSIFIED DOCUMENTS ONLY
Top 13 Public Documents Glophaned Content Deeded	Title Of Decument	SECURITY NOTICE:
Ranka's Public Folder	The Cr Locament	
L 🖌 Auguest Subfolder		This library is a community wide access library.
G Robus HD pub	Description	
Rhoel public target get 5:15AC fader		WORKFLOW.
Grand Sider		
G gabos com		Document will be submitted to the community administrator for acceptance. Once accepted
C Baleve's public		1. All members of the community will have access.
- Person rates	Crey Discurrient To Other Folders:	System ownership controls of the document will be managed by the administrator.
ienstest/fiest	fix Brouts.	
JS off test		Pressing "Upload" will alert the community administrator to accept the document for community
2A4y 29 2010		wide access.
V Koefe 622		
V khoe hd pub 11508	Upload Cancel	

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).
- 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.

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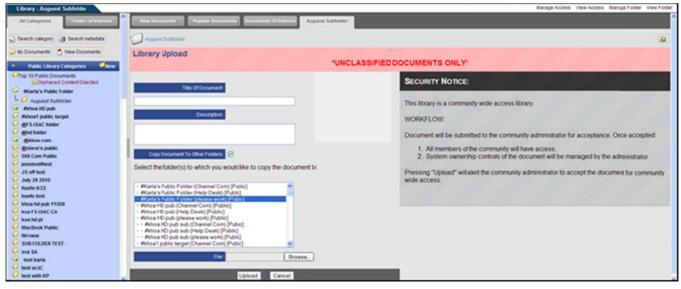


Figure 1.15 – Copy to Other Folders

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

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Figure 1.17 – Accept/Deny Uploaded Document

Library - #Karla's Public Folder	
All Categories Enders of Interest	New Documents Pupular Documents Documents Of Interest Marin's Public fold.
🚡 Search category 🌏 Search metadata	When accepting a document infolhis public library category, remember that all members under this community, regardless of compartment, will be able to view the document.
🜙 My Documents 📩 NewDocuments	There are no documents pending acceptance.
Public Library Categories View	OK .
Top 10 Public Documents	

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).

Preservenority In an advance/hooks The advance/hooks The advance/hooks The advance/hooks The Maximum Advance of the MSIX Intelligence Portal. Click on the URI to inview the document intelligence Portal. Click on the URI to inview the document intelligence Portal. Click on the URI to inview the document intelligence Portal. Click on the URI to inview the document intelligence Portal. Click on the URI to inview the document intelligence Portal. Click on the URI to inview the document intelligence Portal. Click on the URI to inview the document intelligence Portal. Proves database how for the State of the Portal (you user Profile/Preferences If you have forgottem your usersame add/or password to access the system, please contact the Meip Desk at (804) 744-8000 or email steven.taylor@not.us. The Meip Desk is available Nonday through Priday from BioDom to BioDom EST	19062008 12:50PM	To Atura stateritivol us
Tour document has been approved in the HSIN Intelligence Fortal. Elick on the UNL to inview the document inside the postal (you will first be prompted for your username and password): https://Jo.15.35.141/member/libraryVY/Jodes.fb/comparimentP-127159 Tou can disable these notifications by editing your Deer Frofile/Freferences If you have forgotten your username and/or password to access the system, please contact the Help Desk at (104) 744-8000 or email steven.tylor@not.us. The Help Desk is available Monday through		
httgs://10.10.19.148/wemmer/library/7/index.fm?comparimentP-123159 Tou can disable these solifications by editing your Deer Frofile/Freferences If you have forgotten your username and/or pissword to access the system, piezse contact the Mulp Deek at (804) 744-8000 or email steven.tylor@sc4.us. The Mulp Deek is available Monday through	Four document has been approved in the HSIN Intelligence	Portal.
	tige1//10.10.52.148/weNter/library72/index.tfm?comparis	most-222119
		coess the system, please contact the Help Desk at (804) 744-8800 or email steven.trylor@no4.us. The Help Desk is available Monday through

Figure 1.19 – Approval Notification

10060	& Karla Statter Cateven laylor@viol us>		Stars stater@rot us				
	Please respond to	er bes					
	karia stalamitrod us		Denied document in HSIN Intelligence				
	ment was denied in the MSIN Intelligence Portal.						
	ment was denied in the MJIN Intelligence Portal. the URL to prview the message inside the portal (you	will first be prompted fo	or your usessame and password :				
lick on			or your username and password :				
lick on	the CB1 to review the message itside the portal (you	39	or your username and password;				

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.

Library - #Karlas Public Folder								View Fold
All Categories Exchanged amounts	New Documents Papelar Documents Docume	Marina Public Fulder						
👌 Search calegory 🚽 Search metadata	Rate Public Febr							
My Documents 👌 New Documents	* You must use bitemet Explorer and Flash Playe 8 or above	e otherwise your upload will not work.*						
Public Library Categories	This library is a community write access library These docu	ments will be putmitted to the community an	ministrator for acceptance.					
Tap 10 Public Documents	Once accepted, all members of the community will have acc	ess. Once the community administrator acce				aged by the administra		
Qittou Have Approvals Pending	UNCLASSIFIED DOCUMENTS ONLY		Select file(s)	to upliced by open	is genetical		28	
Adres Adres			Look	n: CA images 10	10807-006	- 0000		
Roota hoop	Fishane	Nor Below		210	1.15 1.30	2.45	21.00	
#Karlas Public Fokler			My Recent Documents	21.1	1.16 1.31	2.46	1.61	
Riboa FS-ISAC			My Repart Documents	1.2	L17 L32		1.42	
Riboe HD pub			1.12/12/12/14/14	314	1.18 1.33 1.19 1.34	51.40	1.64	
Ribca with doenline			Dealthan	1.5	1.30	1.50	1.45	
Richow1 public target Stituney5			Ceanop	1.6	1.21 1.36	20 1.31	1.66	
-Karlas lest			- C - C - C - C - C - C - C - C - C - C	1.7	1.22 1.37 1.23 1.38	1.52	1.67	
@ portal search pub	1				1.3	1.54		
BBBLA			My Documents	1.10	1.25 1.40	1.95		
BBBLA	Dence Gamere Gamer	Patron	124	1.11	1.36 1.41	2.56		
@@khoaf 5.ISAC	C. M. Barres C. M. Barres C. M. Barres C.		Ny Computer	1.13	1.27	1.57		
@FS-ISAC Ridder	Cheven Revis united		My Computer	1.54	129	1.59		
@hd tabler			67					
Ekhoa pub move 1 Ekhoa pub move 2	Send Notification	9 tint	utera 😌	.a.				
genos patritore 2 dishosit0			My Natwork Places	Fie name:		-	Open	
Esteve's public			1.000	Fies of type:	All Films		Cancel	
Vitoo hoo								

Figure 1.21 – Browse Documents for Upload

COMPLETE PORTAL USER GUIDE

Library - #Karlas Public Folder		View Folder
All Categories Future of Intervent	Reve Socientette Papule Socientette Discontente (Frances) Marke Public Fublic Fublic	
👌 Search category 🍓 Search metadata	Radial Public Faster	
🤪 My Documents 📩 New Documents	* You must us themet Eighner and Flash Plant 8 or above phenese your uplied will not work.*	
Public Library Categories Public Documents (315) Have Approach Proding	This Brazy is a continuely wate access tilrary These documents will be autoritied to the community administrator for acceptance. Once accepted, all memolers of the community will have access. Once the community administrator accepts the document pattern averensing controls of the document will be managed by the administrator	
Prevent	UNCLASSIFIED DOCUMENTS ONLY	
P Raca	Finance For Refs.	
🧭 #hoda hoop	1 (2) pg (1) (2) (2) (2) (2) (2) (2) (2) (2) (2) (2	
Karles Public Folder		
Pehoa FS-ISAC Pehoa HD pub		
C Balas with downline		
🧭 #khoe1 public target		
Stioney5		
 -Karlas test @ portal search pub 		
C BEBLA		
C BEBLA	Conver Chanter Chant	
emod sisk	A Contract of Contract of Contract	
ersisac taker	1 Nic selected (16.73 NB)	
Ghd faider Galoe pub move 1		
gkhos pub move 2	Several Notifications	

Figure 1.22 – Selected Files for Upload

Library - #Karlas Public Foller		View Folder
All Categories	Reve boconsetta Popular boconsetta Documenta (11 traves) Marka Public Falder	
🔊 Search calegory 👌 Search metadata	Ranus Public Fooler	
🥔 My Documents 📩 New Documents	*You must use bitemet Explorer and Flash Plane B or above otherwise your upload will not work.*	
Public Library Categories More Top 10 Public Documents Citize Have Approvals Prinding	This Stray is a community well access library These documents will be published to the commun Once accepted, all members of the community will have access. Once the community administration	why adversity for acceptions. In accepts the document, system semanting contrasts of the document will be managed by the administrator
C sevent	UNCLASSING DOCUMENTS ONLY!	
G Adech	Concernant and Concernant and Concernant and	
G Phoola hoop	Fiscane Box Box	
Startes Public Folder		
Motos FS-ISAC		
🧭 #khoa HD pub		
Hobe with downline		
Michoal public target		
Generation States		
C @ portal search pub		
0 000LA		
C BBBIA	Dave Games Dave State	
Genoal SishC	Conce Cheve Chevel	
ers-Isac Rader	Upland Complete	
end hader		
entre pub move 1	Sent Notification 🖸	Indicators
Ghoa pub more 2 Gaboal O		
C Bateva's public	Upload of the #1, training info.doc was successful	
Ution hoo		
9 10/26 test again	Success, al 1 Nes uploaded.	

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 D button to grant the access. Highlight a user's name and select the dutton 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.

Library - #Karla's Public Folder	Manage Folder: View Access: View For
All Categories	New Decements Paper Decements Decements of Interest Marky holicfold.
Search category 🛃 Search metadata	Manage access for Library category #Karta's Public Folder
My Documents A New Documents	The Of Callegory #Karla's Public Folder Admins must be selected from the organization. Help Desk
 Public Library Categories 	NOTE: This is a Public Galegory and you may anly add or semices Administration
Top 10 Public Documents	Available Users Assigned Users
Companies Context Detected Companies Context Detected Companies Public Folder Companies Dublic Solder Companies Sold Context Compani	Image: Status Imag
Keele 6/22 keele test khoe hd pub 11508	Finished Update Category Cancel

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.

Library - #Karla's Public Folder		Manage Folder Manage Access View Folder
All Categories FUID on a Clinice at	New Documents Popular Documents Documents Of Interest Refs/s Public Foldu:	
🗋 Search category 🛃 Search metidata	Rates Public Folder	
실 My Documents 🎽 New Documents	User Access List	
	User Name	User Organization
 Public Library Categories 	Rice, Karla (Admin)	Help Desk
	508 Community	(Organization)
Top 10 Public Documents	Alexandia	(Organization)
Orphaned Content Detected	Another level II	(Organization)
G #Karla's Public Folder	8	(Organization)
	Billing Report One	(Organization)
L 🤪 Auguest Subfolder	Billing Report Sub One	(Organization)
G #Moa HD pub	Billing Report Two	(Organization)
G #ktoa1 public target	C	(Organization)
	California Channel Com	(Organization)
Gr5-ISAC toker	Channel Sub Com 1	(Organization)
🤪 and folder	Channel Sid Com 1 Channel Sid Com 2	(Organization)
G gahoa com	Chasterfield	(Organization)
		(Organization)
Gateve's public	Community Level III El Paso	(Organization)
501 Com Public	Fair Fai	(Organization) (Organization)
🧭 jenstest/fiest	Fincle Time	(Organization)
JS off test	FRIGAC	(Organization) (Organization)

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

Library - #Karla's Public Folder				Manage Doo	uments Manag	e Access View Access	Manag	e Folder
All Categories	New Documents Popular Documents	Documents Of Interest	#Karla's PublicFold					
) Search category 🔄 Search metadata		The	lolder move was c	ompleted successfully.				
	Hartura Public Folder			🕥 💋 Create Sub-folder	🦛 Add to FOI	Upload Document	t Da	R Upload
Top 10 Public Documenti Control Detected Reboe HD pub Reboe HD pub	housest Subbles minorestructure ADDEEXCLAL ETrain RR. Configuration commonitations.do CollnXCAL ETrain RR_Configuration commendations.doc View Meta Data	Ma Trysa maword	Karla Rice	Universited 2010-08-30 29 39 00 0	5074 (Brites) 649,216	0 0		Defets
Ghd toker Gkhoa com	115.08 Training July 10 ppt S of Training July 10 ppt View Meta Data	vnd.ms-powerpoint	Karla Rice	2010-08-30 20 39 00 0	821,248	0	4	•

Figure 1.27 – Move Folder Confirmation

Сору

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).

Library - #Karla's Public Folder				Manage Doo	uments Manag	e Access View Access	Manag	e Folder
All Categories	Real Documents Popular Documents	Documents Of Interest	Maria's Public Fold					
🗋 Search calegory 🛃 Search metadata		The	folder copy was o	ompleted successfully.				
🔐 My Documents 💍 New Documents	Rature Public Folder			🔂 🐔 Create Sub-folder	🧔 Add to FOI	Upload Document	3 Du	ik Uploa
Public Library Cetepries Public Documents	Auguest Subfolder, Name Description	file Type	Owner.	Uptoredied	Size (httes)	Downloads, -v	001	Defet
Biboa HD pub Biboa HD pub Biboa 1 public target	ADDENDUM ETeam R2 Confouration Bacontraendations.do ADDENDUM_ETeam R2_Confouration Recommendations.doc	maword	Karta Roe	2010-08-30 20 38 00 0	649,216	0		0
dif S-ISAC folder dight folder dight folder dight folder dight folder dight folder dight folder	View Meta Data	vnd.ms-powerpoint	Karta Roe	2010-08-30 20 39 00.0	821,248	٥	4	•

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.

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Library - Sub FOlder	Vie	ew Folder
All Categories (judiers of interest	Reve Documents Pupular Documents Cristerest Sub FOlder	
🕤 Search category 🔄 Search metadata	D Sus Folser	3
🔪 My Documents 📩 New Documents	Are You Sure?	
Public Library Categories // Norw Corptand Context Datected Microsoft Date Microsoft Date Microsoft Datected	DeletingFolder cannot be undone. Delete Do not delete	

Figure 1.29 – Delete Confirmation

Library - test karla		Manage Access View Access Manage Folder
All Categories	New Documents Provine Documents Of Interest Seat Lark	
SUBFOLDER TEST - State State Longw Hest WUC	The folder was successfully deleted	🙀 Add to FOI) 🔮 Upload Document 📳 Bulk Upload
test with KP	a Sub FOrber. There are no documents in this sategory	

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.

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Library - #Karlas Folder					View A
All Categories Colders of Interest	Bene Documents	Popular Documents Documents Of Interest	#Karlas Folder		
Search category	Rearias Folder				🦕 Ada
Wy Documents Average New Documents	Name Description August 2010 August 2010	He Tron Owned meword Karla R	ce 2010-08-30 12:23.00	974 (Brites) 0.0 1,372,160	Downloads, .v
 Public Library Categories New 	- August Control				



Library - #Karlas Folder					View Access
All Categories Finders of Internal	These Decomposition (Propose	Decuments Decuments Of Internal	Rarlas Foller	tile Download	
Search category	Cartas Folder			Do you want to open or save this file?	Add to FOI
My Documents My Documents Podels Library Categories Top 50 Public Documents Minos HD public Minos HD public Minos HD public	Annual Deside addon Annual 2010 Annual 2010	His Troe, Owner, meword Karla Roc	• 2010-0	Name DocumentationShyleGuide day: Type: Moreant Ward Document Non: opening.cock.hoad Open: Serve Cancel	200
@ @hd folder @ @stevr's public Good StatestRest JS off feat				White files from the internet can be useful, some files can potentially here your computer. If you do not trust the source, do not open or seve this file. <u>What is that shi?</u>	



Library - #Karla's Private Folder				Manage	Access View Access	ManageFolder ViewFolder
At Categories Tiklers of Interest	Real Documents Propular Document	fa Documents Of Interest	RKarla's Private Fol			
Search category	Ratas Poulo Folder					
🤪 My Documents 📩 Nex Documents	Dremicad History					
Public Library Categories Steve Security 10	Kene Description August 2010	File Type application/msword	Owner Karta Rice	Date Uploaded 8/30/10	Size (Bytes) 1.372,160	Downloads
🐖 Mithoa HD pub	Aspust 2010 Download Details					
Pichoa1 public target Ghd folder Gateva's public	Person Downloading Karla Rice	Employer Name ESP Group	Time of Last Down 8/30/10 - 9/32 PM Beturn to Fider Listing Download		Times Downloa 1	ded

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.

Library - #Karla's Private Folder	View	* Folder
All Categories Fiders of Interest	Bew Documents Popular Documents Of Interest Marine's Private Fol.	
Search category	D Ricelans Private Folder	
🔐 My Documents 🔄 New Documents	Are You Sure?	
Public Library Categories Chew Pop 10 Public Document Pop 40 Public Document Pop 40 Public	Deleting a bocument cannot be undone.	
G Rkhoa1 public target	Delete Do not delete	

Figure 1.34 - Confirmation Screen

Create New Category

1. Click on the "New" link (see Figure 1.35).

NC4

- 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).

All Categories Fiderce of Interest	Rew Documents	nta Bocumenta Of Int	ereel				
Search category My Documents	All by Documents	Show All A R	CDEFGHIJKLM		WXX7		
Public Library Categories		1-10 0	of 37 Documents 10 p		>>		
Richoa HD pub	Name Description	File Type	Category	Owner	Uploaded	Size (Dyles)	Contribute -
	koa1 test pending approval	plain	khoa hd pub 1150	pham, khoa	5/27/10	99	6
#khoa1 public target	hod Atoata	1040	(Public) khoa hd pub 1150	pham, khua	5/27/10	64.238	
@hd folder	A ADALA	Ped.	(Public)	prositi, stata	574.1114	54,230	
Esteve's public	August 2010	msword	#Katas Folder	Rice, Karla	8/30/10	1,372,160	5
jenstest/Rest	August 2010		(Private)				
JS off test	eso group M	plain	Mittoa HD pub	pham, khoa	8/25/10	2,160	3
July 29 2010	_etp_group.bit	1000	(Public)		5/27/10	216.947	
Keefe 6/22	A ktype to its ac	3peg	khoa hd pub 1150i (Public)	pham, khoa	5/27/19	215,947	× .
keeds test	Altest 1	1040	Rhoa1 public taron	pham1, khoa1	7/26/10	31.402	2
khoa hd pub 11508	led		(Public)				
koa hd pt	Attag	plain	Whoa1 public target	pham, khoa	7/27/10	22	2
MacBook Public	ht		(Public)				
	Addes_1	plain	Phos HD pub sub (Public)	pham, khoa	8/25/10	2,705	2
SUB FOLDER TEST -	Attest BRO 2	1040	Mitca HD pub	pham, khoa	8/25/10	154,483	2
test wOC	a distalational		(Public)			114,412	
test with KP	A Roat	plain	khoa hd pub 1150	pham, khoa	5/27/10	2,160	1
Private Library Categories			(Public)				
Top 10 Private Documents	-						

Figure 1.35 – Library



Figure 1.36 - Create a Category Name



Figure 1.37 – View Private Category



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).

Library - #1 My PrivateCategory	
All Categories Falsers of Interest	New Documents Pupule Documents Contenants Of Interest #1 By Private Corpo
Search category	To create a category you must frot name it. Type in a category name below, then click "Creats"
🤐 My Documents 📩 NewDocuments	Name of Calegory
Public Library Categories	Ceate Carcel
Corp 10 Public Documents	
#khoa1 public target SUB FOLDER TEST	
G test WJC	
Sest with KP	
 Private Library Categories 	
CTop 10 Private Documents	

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 <u>Section 3 – Folders of Interest</u>.

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 <u>Revision Control</u> 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.

Library - #1 My PrivateCategory		Manage Access	View Access	Manage Folder	View Folder
All Calegories Feiders of Interest	Inver Documents Propular Documents Dr. Inverse Program				
Search category	T My Private Category				
Hy Documents NewDocuments Public Library Citegories	Library Upload "UNCLASSIFIED DOCUMENTS ONLY"				1
Cop 10 Public Occuments Mihoe 10 public Mihoe 10 publ	Title Of Document Cescription Cescription File File Browse. Use Revision Control System No O Yes What is RCS Send Nedfaction				
 Private Library Categories 	Ujload				
Top 13 Private Documents					

Figure 1.40 - Upload Document to Private Category

COMPLETE PORTAL USER GUIDE

	Portal Information
100401 0000 000 000 000	window to return to the previous section
Library Notification	U
	Notification" all visible members of the current folder will essage and a notification that this document was uploaded to
	Close Window

Figure 1.41 – Portal Information

L	
L	A new document has been uploaded in the HSIS Intelligence Portal.
L	Click on the URL to inview the document inside the portal (you will first be prompted for your usersame and password):
L	https://10.10.30.14f/wester/librai_05/Libex.ifs/toomesterise.191
L	You can disable these motifications by editing your User Profile/Pyeferences
l	If you have forgotten your username and/or piseword to moves the system, please content the Help Desk at (804) 744-8800 or email steven.tiplordnot.us. The Help Desk is available Honday through Friday from Brodem to Brodem EdTr.
L	

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.

COMPLETE PORTAL USER GUIDE

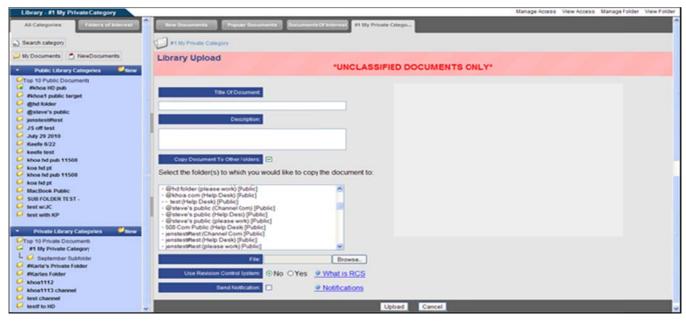


Figure 1.43 – Content Manager

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 D 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.

Library - #1 My Private Category		Manage Folder Manage Access View Access View Folder
All Categories Edders and Internal	New Documents Popular Documents Documents Of Interest P1 By Private Catego	
Search category	I I My Private Category	
🔑 My Documents 📩 New Documents	Document New	
Public Library Citegories Top 19 Public Documents Micros HD public	Revision Control Help: Click on names in one box or the iffer. then click on a direction button (Add > or < R Austrolite Users	Assigned Users Rice, Karla (Channel Com)(Admin]
Prince no poor Prince n	Þ	
genere s pane. jenstostifiest JS off lest JAy 29 2010	Admin View Only	
Keefs 5/22 Keefs 5/22 Keefs test Khos hd pub 11508	Uters	Show users with these rights
G koa hd pt G MacBook Public	Refesh List Change Right	Admin View Only Vole Edt Refeesh
U SUB FOLDER TEST - U test wUC U test with KP	Search Search	
Private Library Categories Here Top 10 Private Documents F1 By Private Category	Viling Guession	
L C September Subfolder	Alow Multiple Votes? ONo OYes Save	
RKarla's Private Folder RKarla's Private Folder		Cancel

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. 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. 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. 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 Access," "View 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.

Library - #1 My Private Category					Manage Documents II	lanage Access View A	corss Man	age Folder
🜙 My Documents 💽 NewDocuments	Figure Documents Popular Docu	inerta Documenta	er transmitter and the second	ate Catego				
Public Library Citegories Public Documents	F1 My Private Category				💋 Create Sut	ə-folder 🦕 Add to FOI	🕈 Uploa	d Document
mihoo 10 pub moto motosofilist gudstovis public justicofilist Jusy 32 019	Constanting of the second seco	File Type msword	Ownet Karla Rice	2010-00-31 13:43:00 0	5026 (0\160) 1,372,160	Downloads	201	Dedector

Figure 1.45 – RCS Document (Admin View)

			Сомр	LETE PO	RTAL	USER
brary - #1 My Private Category M Categories Follows of Interest	These Documents Popular Documents	Bocuments Or Interest 71 My Private Citrigs	Manage Folder Manag	e Access Vie	w Access	View Folder
earch category ly Documents 🖉 NewDocuments	Name Description	File Name DocumentationStyle/Guide.doc	<u> </u>	nve Copy ➡ ③	tar 2	
Public Library Cilegories op 10 Public Documents Richos HD pub	Cop	y Selected Move Selected Add to Documents of Interest D	Velete Selected Cancel			

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.

Library - #1 My Private Category	View Folder
All Categories Failure of Interest	Inve Documents Popular Documents Colorerest Pt Bly Private Criego.
Search category	T By Piscale Category
🔑 My Documents 💍 NewDocuments	If you click on the "Download" buton, you will be allowed to download the document without locking the document.
Public Library Citegories Orgo 10 Public Documents	Editing this document will "tock" the document will gou check it back in. Wood you like to continue?
 #khoa HD pub #khoa1 public target 	Yes.Contrue Download Carcel

Figure 1.47 - Download a Document

Library - #1 My PrivateCategory					Manage Documents	Janage Access View A	corss Mana	age Folder
All Categories	Real Documents Popular Documents	Decuments	Provincest Pt By Pro	rate Citego				
Search calegory	R1 My Private Category				💋 Create Sub	-folder 🦕 Add to FOI	Dipload	Document
Wy Documents 💍 NewDocuments	Sectember Subfolder	File Tape	Owner.	Uploaded.	Size (Dyles).	Downloads -v	001	Delete
Public Library Citagoni New Documents Top 10 Public Documents Mihoe 10 public Rhoes 10 public Rhoes 10 public target Mihoes 10 faber	Transing Sectember Policies annuelle Checks Document In Unick / Cancel Edd Admin Options	msword	Karla Roce	2010-08-01 10:43:00.0	1,372,160	1 View.History		0)
Gateve's public	Document on training process							

Figure 1.48 - Check-In and Unlock a Document

-1104	
	COMPLETE PORTAL USER GO
Library - #1 My Private Category	View Folder
All Categories Fallers of Interest	New Documents Popular Documents Clinterest #1 By Private College.
(j) Search calegory	P 1 My Physike Callegory
🔑 My Documents [💍 NewDocuments	By uploading a new document, the revision number will be updated and the file will become "Velocked." Or, you can click on the "Unlock/Cancel Edit" button if you wish to unlock the document without making any changes. The document will revert back to the previous revision.
 Public Library Collegories 	Occurrent Iraining September
V Top 10 Public Documents	Uplead Document
G Richoal public target G @hd folder	Upload Utlock/CancelEdit Cancel

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.

Library - #1 My Private Category		View Folder			
All Categories Falters of Interest	Fiere Documents Popular Documents Documents Of Interest	1 My Private Citego			
Search category	#1 My Private Category				
Documents 💍 NewDocuments	Ed document hame and/or destription of the file named DocumentationStyleGade.doc				
	New Description	New Name			
 Public Library Categories 	Document on training process	Training September			
Contraction for the second sec	Add or remove this document from Revision Control (This document is currently under Revision Control)	Place under RCS ^O Remove from RCS O			
G #khoa1 public target	Update	Cancel			

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.

DF

- 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

Library - RArla's Private Folder	Bree Documents Popule Documents Documents Of a	Maria's Private Fol-				View Folder
Search category My Documents New Documents	Rearis's Private Folder Non-most loss Internet Explores and Flash Places 8 or above other	where your value because work where		uplead by opmis.qc.nc4.local	- 01	22
Public Library Categories Top 10 Public Documents ##Rest #Rhos ND pub #Nhos	UNCLASSIFIED DOCUMENTS ONLY	Bur Bates	No Deciments Desicas My Documents My Documents My Documents My Documents My Documents	Hrd User Gude 1.00.02 Hrd User Gude 1.00.01 Hrd User Gude	04 4-004 1-005 8-002 17 8 9 5-50802-001 019-007 # Gude v13-101927-003 v20-13108-004 0-2130-004 007	BEP - Hell Law Gude BEP - Hell Law Gude BEP - Organizational A BP - Support Develop BP - Support Center 1 BP - Trading Law Gude BP - Trading L

Figure 1.52 – Browse Documents for Upload

COMPLETE PORTAL USER GUIDE

Library - #Karla's Private Folder			View Folder
All Callegories Finders of Interest	Real Doursetta Popular (Doursetta) Dourse	ent Of Internal Rental Private Fol.	
 Search category 	D Martan Private Folder		
Documents 📩 New Documents	*You must use Internet Explorer and Flash Player 8 or above	ve oberwise your upload will not york.*	
Public Library Categories	UNCLASSIFIED DOCUMENTS ONLY!		
Top 19 Public Documents Arena SID public Phone SID public Phone SID public Phone SID public target StooryS Got St	Planame Eller - Ames User Guile v10-10100-01 as Eller - Char User Guile v10-10100-01 as	Bite Between 1.2.00 mmon Pro Bitl +B mmon Pro	
gystever s poloc Vito holo 10/26 test again 10/28 METEST 10/28 Met W27 feeting BUG 6138	Coverse Conserve Conserve	⊉ typeser	

Figure 1.53 – Selected Files for Upload

Library - #Karla's Private Folder			View Folder
All Callegories Finders of Interest	Reve Documents Popular (Documents Docu	mente Cristerant Black's Private Fol.	^
Search category	Maria's Private Folder		
🔑 My Documents 📩 New Documents	* You must use Internet Explorer and Flash Player 8 or a	bove otherwise your upload will not vork.*	
 Public Library Categories 	UNCLASSIFIED DOCUMENTS ONLY		
Top 10 Public Documents ##Rest #Rhos IND pub Pichos with downline Pichos with downline Pichos with downline Pichos rubbic target StoreyS @ portal search pub @hos pub move 1 @khosiK0 @khosiK0 @khosiK0 @khosiK0		Bite Botto	
	Categories	ingrywar ™ <u>Notfication</u>	
U jenstestiffest	Upload of file #1, ESP - Alerts User Guide v10-10103-00 Upload of file #2, ESP - Chat User Guide v10-10105-007		

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.

Library - #1 My Private Category	Manage Folder View Acces	View Folder
All Calegories Failure of Inferent	New Documents Popular Documents Documents Cf Interest At By Private Glego.	
Search category My Documents Anno Documents	Manage access for Library category #1 My Private Category Inter Collegans #1 My Private Category Admins must be selected from the organization: Channel Com #2 Turbs Uncasement their	
Public Library Categories Public Documents	Auslable Users Assigned Users	
Boo 10 pub Who 10 pub W	S01, 501 (Help Desk) Pice, Karla (Channel Com)(Admin] angentia, angentia angentia (Help Desk) Imicude Subs? Channel Com (Typicarization) Inicude Subs? Channel Sub Com 2 (Organization) Imicude Subs? Viewr Sonty Admin © Users Cotin, Jennifer (Help Desk) © My Groups Desk) Desk) Viewr Only	
keele test Keelepaal test khoa hd pub 11508 koa hd pd	Channels Show users with these rights Show users with these rights Channels Channels Channels User	
Monitory period MacRook Public State Follow Public State wide Inst wide Inst wide	Search Refesh	
Private Library Categories	Finished Update Category Cancel	

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.

Library - #1 My Private Category			Manage Folder	Manage Access	Vew Folder
All Categories Follows of Interest	Rew Documents Popular Documents Documents Of Interest #1 By Private Catego				
Search category	#1 My Physics Callegory				
🜙 My Documents 📩 New Documents	User Access List User Name	User Organization			
Public Library Categories	Spader, Aimee Corbin, Jerwiter	Help Desk Help Desk			
Top 10 Public Documents	Rice, Karla (Admin) Smith, Kate (view Only)	Channel Com Help Desk			

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.

Library - #1 My Private Category		Manage Access	View Access	View Folder
All Categories Faders of Interest	Reve Documents Popular Documents Documents Of Interest #1 My Private Citings			
Search category	I My Physics Category			
Wy Documents Nex Documents Public Library Categories Top 10 Public Documents Rhoos H0 publ Rhoos H0 publ Rhoos H0 public Rhoos H0 public Rhoos H0 public Storey S public Storey S public public Storey	Pick A New Faster "Create a New Public Category "Create a New Public Category #Karla's Private Folder			
🥥 JS off test	Include Sub Categories Move Copy			
July 29 2010 Keefe 6/22 keefe test	Cancel Delete Folder			

Figure 1.57 – Manage Folder

Library - My Private Felder				M	anage Documents Manage	Access View Ac	orss Manag	je Folder
All Calegories Publics of Anterest	form Documents	Popular Documents Documents Of Interest	My Private Folder					
) Search category		The	folder movewas c	ompleted successfully.				
My Documents NewDocuments Public Library Categories	U My Private Folder				🛐 🧭 Create Sub-folder	😝 Add to FOI	Dipload C	Jocumen
User Gades	August 2010 August 2010	He Inc. Indims powerpoint	Karla Rice	2010-08-11 14:09:00.0	801,400	Downloads, -v 0	DON J	Delete
Private Likrary Categories New Top 10 Philate Document Karlas Training Docs Konthy Schedules Control Philate Folder Control Subfolder Control Subfolder								

Figure 1.58 – Move Folder Confirmation

Сору

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).

Library - #1 My Private Category				Manage Do	cuments Mana;	e Access View Access	Manag	e Folder
All Categories Edders of Interest	Here Documents Popular Docum	ents Bocuments Of Interest	#1 My Private Catego					
) Search category		The	folder copywas co	ompleted successfully.				
Wy Documents New Documents Public Library Categories	#1 My Private Category			🚰 🧔 Create Sub-folde	👒 Add to FOI	Upload Document	3 Du	ik Uploa
Top 10 Public Documents Fiboa HD public Fiboa HD public target fiboa HD public target fiboar	September Suthister September Suthister Final Sectors President Sectors President Sectors	tile Tupe msword	Karla Roe	104/06/00 2010-08-31 13 43 00 0	500 (fintes) 1,372,160	Downloada		Dedete
Gsteve's public jenstestifiest J S off test July 29 2010	Unlock / Cancel Edit Admin Collans Document on training process Documentation/Shite/Cuide.doc	msword	Karla Rixe	2010-08-31 14 30 00 0	1,372,160			
Koefe 6/22 koefe test	DocumentationStyleOuide doc 115:08 Training July 10 ppt 115:08 Training July 10 ppt	vnd.ms-powerpoint	Karla Rive	2010-08-31 14:30:00.0	821,248	0	-	0

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.

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Library - September Subfolder	View Folde
All Categories Follows of Interest	Kew Documents Popular Documents Of Interest September Stafilder
Search category	Deptember Subfalder
🌙 My Documents 📩 New Documents	Are You Sure?
Public Library Categories Stow Top 10 Public Documenti Show 10 public Rhoos 10 public Rhoos 10 public Rhoos 10 public Rhoos 10 public Rodos	Deleting Folder cannot be undons. Deletis Do not deletis

Figure 1.60 – Delete Confirmation

Library - #1 My Private Category				Manage Doc	uments Manag	e Access View Access	Manag	je Folder
All Categories	New Documents Paper Docum	ents Documents Of Interest	#1 My Private Catego					
Search category			The folder was su	ccessfully deleted				
Wy Documents New Documents	at My Private Category			🔂 💋 Create Sub-folder	Ga Add to FOI	Lipload Document	🕐 Đư	ik Uploa
Public Literary Categories	A Training Sectorember Previous Version Previous Version Check Document In Vincing / Cancel List Admin Outloos Document on training process	File Troe moword	Owner. Karla Roe	2010-06-31 (3.43.00.0	<u>Sire (Inves)</u> 1,372,160	Downloads, -v 1 View History		Defet
JS off test July 29 2010	DocumentationStheGuide.dxc DocumentationStyleGuide.dxc	msword	Karta Rice	2010-08-31 14:30:00 0	1,372,160	0		্র
Keele 6/22	115.08 Training July 10 ppt	und.ms-powerpoint	Karta Roe	2010-08-31 14:30:00.0	821,248	0	12	•

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.

Library						
All Categories Rollers of Interest	New Documents	Popular Documents Documents Of Interest				
🔒 Search category 📑 Search metadata	All My Documents					
🌙 My Documents 📩 Nev Documents		Search Show All A B C D E F G H I J K L	MNOPQRSTUVWX	Y Z		
Public Library Categories Galaxies Public Documents		1 - 10 of 242 Documents	0 per page 💌 Submit > >>			
Cophaned Content Detected	Name/Description	Ele Type Calogory	Owner	lipicaded		Downloads -
G Rithola HD pub	(RCS surroyled document)	plain <u>khoa NiC4 role</u> (Private)	pham, thoa	8/27/10	22	ш
G Rhoat public target	- <u>Admin Options</u>					
GF S-ISAC folder	ACI					

Figure 1.62 – Orphaned Content

Orphaned Categories

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



COMPLETE PORTAL USER GUIDE

Library					
All Categories	Ophaned Categories Orphaned Documents				
Search category 📑 Search metadata	Orphaned Private Categories				
and compare the second second	Root Orphaned Category	Orphaned Category	Level	Acti	on
My Documents 👌 New Documents	<u>Ethca001 new orphan folder</u> in (Western Asset Management, Inc.)	ktoa001 new orphan folder	1		9
 Public Library Categories 	Ophan folder in (Western AssetManagement, Inc.)	Cohan fuider	1	2	9
Top 10 Public Documents					

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).

Library - khoa001 neworphan folder	View Folder
All Categories Failures of Interest	Rew Documents Popular Documents Documents Of Interest Mitabilit new ophan
Search category	10 khoadd t new orghan fulder
My Documents New Documents	Are You Sure?
 Public Library Categories 	
Contract of Public Documents	DeletingFolder cannot be undone.
G #khoa HD pub	Delete Do not delete

Figure 1.64 – Delete Confirmation

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Library - #1 My PrivateCategory				Manage Doo	uments Manag	e Access View Access	Manag	je Folder
All Categories	Beer Documents Papaler Docume	rds Decuments Of Internet	#1 My Private Catego					
Search category			The folder was su	ccessfully deleted				
Wy Documents 👌 New Documents	#1 My Private Category			🖼 🤔 Create Sub-folder	Ga Add to FOI	Upload Document	🗶 Đư	ik Uploar
Public Library Categories Public Documents Rhoo IID public Decuments Rhoo IID public target Rhoo II public target Get didar	Rame/Pescriston Claming September (PCS controls feasibility - Protocol Versions - Discr. Document in - Unice C. Cancel Edit	Mo Trace msword	Karla Roe	Usebaded 2010-08-31 13.43.00.0	5220 (04993) 1,372,140	1 View History	001 	Delete
Gateve's public pointerstifiest JS off test Jay 29 2010	Minicol - Lateral Lost Minicol - Lateral Lost Minicol - Lateral Lost Minicol - Lateral Lost DocumentationStrieGuide doc DocumentationStrieGuide doc	msword	Karla Roe	2010-08-31 14:30:00.0	1,372,160	0	4	۷
Keele 6/22	115.08 Training July 10 ppt	vnd.ms-powerpoint	Karta Rice	2010-08-31 14:30:00.0	821,248	0	13	ত

Figure 1.65 – Deletion Completed

Orphaned Documents

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

All Categories 7.5cm citizeness	Orphanel Gringson & Orphanel Do	cumenta					
Search category 🛃 Search metadata	Orphaned documents detected						
and a construction of the	NaneDescription	Category Type	Owner	Uploaded	Size (Dytes)	Downloads	Action
Documents Average New Documents	orphan rcs 1 het	khoa001 new orphan folder	thoa001 pham001	2010-06-24 14:09:00.0	7,439	D	٠ ه
Public Library Categories Public Document Optimic Document Optimic Context Detected	fron Mark Conce	Orphan folder	thoa001 pham001	2010-06-09 10 53 00 0	1,327	Þ	•

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 $\boxed{3}$ icon to add the folder or the $\cancel{3}$ 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.

Library - #1 My Private Category				Manage Doc	cuments Manag	pe Access View Access	Mana	ge Folder
All Cologicies Filders of Interest	Beer Documents Popular Docum	ants Decuments Of Interest	#1 By Private Catego		1			
🕤 Search category	#1 My Private Category			💋 Create Sub-folder	Add to FOR	Upload Document	() Đ	ulk Upload
Private LibraryCategories	Name Description	File Type	Owner.	Uptooded	Size (Dites)	Downloads -v	DOI	Delete
Garla's Private Folder	DocumentationStyleGuide.doc DocumentationStyleGuide.doc	msword	Karia Rice	2010-08-31 15 13:00.0	1,372,160	٥		9
L 🤪 #1 My Private Category	115.08 Training July 10 ppt	vnd.ms-powerpoint	Karla Rice	2010-08-31 15 13:00.0	821,248	.0	4	ø
	Cramino September (RCI service) Edit/version Admin Options	msword	Karta Rice	2010-08-31 15 13:00.0	1,372,160	0		0
	Document on training process							

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 <u>Section 4 – New Documents</u> 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.

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Library							
All Categories Robers of Interval	New Documents Popular Documents	Documents Of In	terrent				
Search category A	I Vy Documents						
🌙 My Documents 📩 Nev Documents	Search St	w Al A B	CDEFGHIJKLI	MNOPQRSTUV	WXYZ		
 Public Library Categories 							
Top 10 Public Documents	Same Description	File Type	Category 10	Owner	Uptoaded	Size (Dytes)	Downloads - v
Withoa HD pub	a koal test cending accroval	plain	khoa hd pub 11508 (Public)	pham, thoa	5/27/10	90	6
Ghd tokler	a koata	1040	Rhoa hd pub 11508 (Public)	pham, ihoa	5/27/10	64,238	5
	August 2010 (RCB sensible document)	msword	Rhartas Folder (Private)	Rice, Karla	8/30/10	1,372,160	5
JS off test			L'enclated al la				

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 Remove 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).

Library - #1 My PrivateCategory	-			Mana	ge Documents Mana	pe Access View Access	Manage Folder
All Categories Editors of Interest	Bew Documents Popular Docum	ents Documents Of Interest	#1 My Private Ortego				
Al Categores	F1 My Private Category			🔛 🧭 Create Sub-folder	Remove from FOI	Upload Document	Bulk Uploa
🜙 My Documents 👌 New Documents	Name Description	Elle Type	Owner	Uploaded		ownioada -v	DOI Defete
Public Library Categories Public Document Top 10 Public Document Mone 10 public Phone 1 public target	Training September ICG services Strategies Since Rookenset Since Rookenset Uniook. (Cancel Edit demin. Calcona	msword	Karla Rici	2010-08-31 13-43.00.0	1,372,160	View History	ن ه م
Ghd tolder Gateve's public	Document on training process DocumentationStyleGuide.doc DocumentationStyleGuide.doc	maword	Karla Rice	2010-08-31 14:30:00.0	1,372,160	0	0 V
JS off test	115.08 Training July 10 ppt	vnd.ms-powerpoint	Karta Rice	2010-08-31 14:30:00.0	821,248	0	🎍 🕥

Figure 1.70 – Add DOI

Library										
All Categories Tolera of Anterest	Bew Documents Popular Documents	Documents Of Inte	rest							
Search category	Documents Of Interest									
and the second s	Name/Description	File Type	Category	Owner	Uploaded	Size (Bytes)	Downloads	001		
My Documents 📩 New Documents	DocumentationStyleGuide.doc DocumentationStyleGuide.doc	msword	#1.Mr.Private Category	Rice, Kata	8/31/10	1,372,160	0	Bemare		
 Public Library Categories 										

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 <u>My Documents</u>.

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 <u>Create New Category</u>.

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 <u>Manage Access</u>.

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 <u>Upload Document</u>.

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 <u>Revision Control System</u>.

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 <u>View Documents</u>.

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 <u>Search All My Documents</u>.

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 <u>Delete Documents</u>.

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 <u>Copy Document to Other Folders</u>.



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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 <u>Documents of Interest (DOI)</u> or <u>Folders of Interest (FOI)</u>.