# Complete Portal User Guide

## Extranet Secure Portals Software User Guide


11-10110-010

# Section 10 – Online Briefings

The Online Briefings tool allows any user to post a Power Point presentation to share with other portal users. Each briefing is uploaded and maintained by the briefing owner. It is up to the owner to grant others access to the briefing and to schedule the date and time for the presentation.

To access this tool, click on the "Online Briefings" link from the Home page, under the Collaboration Tools menu or from the navigation bar.

## Briefing Menu

As shown in Figure 1.0, the "Briefing Menu" screen illustrates the ability to generate and view briefings, send the owner or moderator an email, and manage briefing access. Under the "Briefing Name" heading, briefing names are shown as links, which means content has been uploaded to the briefing. After content has been uploaded, users can click on the briefing name to view the presentation.


**Figure 1.0 - Briefing Menu**

## View Briefing

At the "Briefing Menu" screen, users see a list of briefings that they have been granted access (see Figure 1.0). On the left, under the "Briefing Name" heading are the titles of the briefings. The number of slides in each presentation is shown in parenthesis. Under the "Owner" column is the name of the user who posted the briefing. The "Manage Briefings" heading includes the user rights to view or modify the briefing content. A briefing that contains content appears as a link at the "Briefing Menu" screen.

1. Click on the briefing name.
2. Click on the owner's name to send a secure message.
3. The data that was entered into the Briefing Information screen is now shown: name of the briefing, moderator, start date and time, conference call number, general information, owner, owner's phone number (see Figure 1.1).

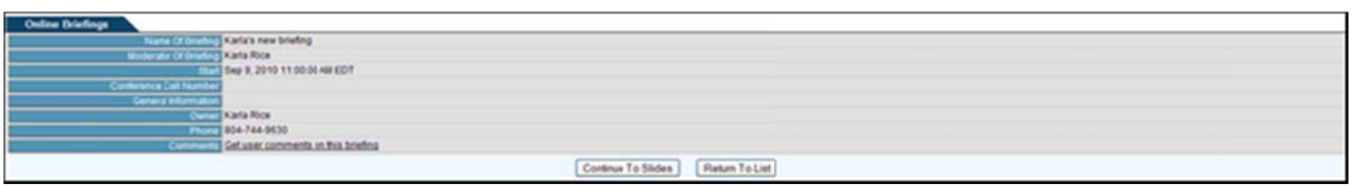



**Figure 1.1 – Briefing Information**

For the moderator and owner, there is a link to view user comments.

1. Click on the "Get user comments on this briefing" link.
2. The comments are listed by date, user name, and actual comments (see Figure 1.2).

3. Select the “Back” button to return to the “Intro” screen.


**Figure 1.2 - User Comments**

## View Slides

1. Click on the “Continue to Slides” button from the “Intro” screen (see Figure 1.1).
2. The slide index of all slide titles is displayed on the left (see Figure 1.3).
3. The actual slide and presentation notes are viewed on the right.
4. Click on the slide title to view the slide or use the scroll bar on the right.
5. After a slide has been selected, the position arrow moves to that slide.
6. At the top of the screen, next to the “Slide Index” frame, there are two links: “Large Slides” and “User Comments.”
7. Select the “Large Slides” link to enlarge the size of each slide.
8. To decrease, click on the “Small Slides” link.
9. To proceed to the “User Comments” screen, click on the “User Comments” link.
10. Click on the “Next Slide” or “Previous” slide link to move from slide to slide. The slide number is indicated in the middle.
11. Click on the “Return to Briefing Menu” link to return to the list of briefings.
12. Click on the “Home” link to proceed to the portal home page.

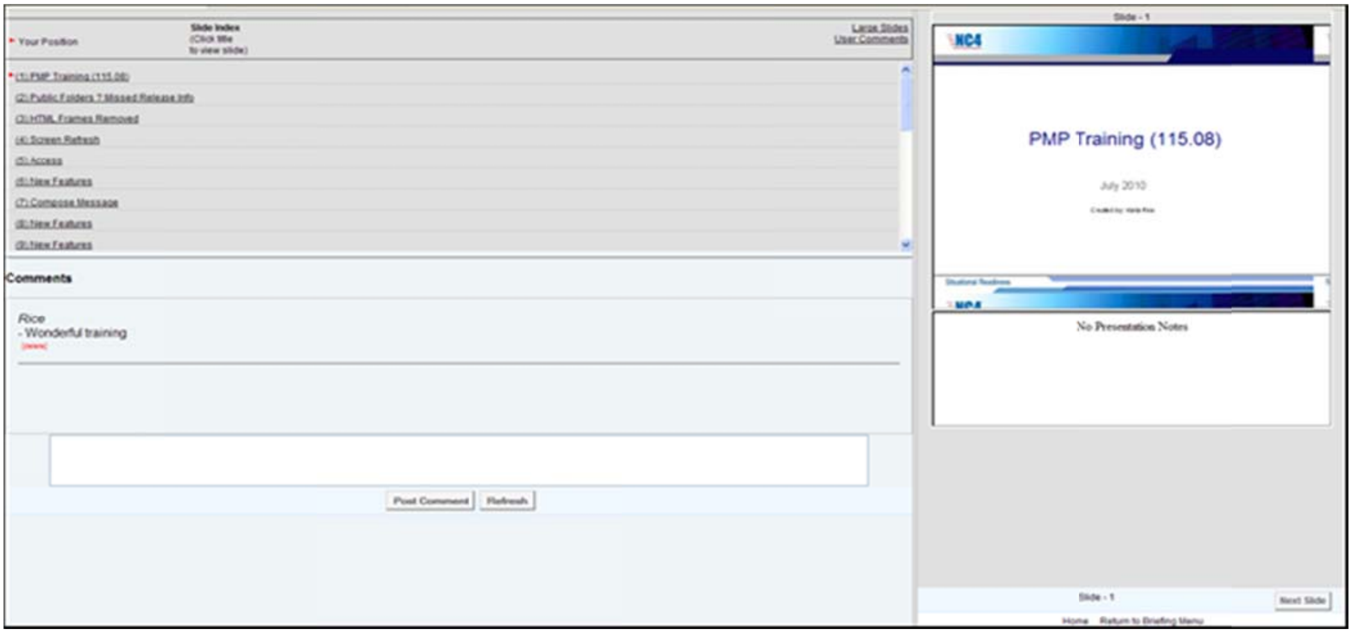



**Figure 1.3 - Online Presentation**

## Briefing Chat

Users can have ongoing chat during a presentation. The chat feature is unique to each slide and will refresh to include the comments only for each specific slide. To view the comments for all slides, click on the "User Comments" link in the Slide Index at the top of the page (see Figure 1.3).

## Moderate Briefing

In order to moderate a briefing, the briefing owners assign users as moderators.

1. Click on the briefing title from the Briefing Menu screen (see Figure 1.0).
2. Click on the "Moderate Briefing" button (see Figure 1.4).
3. At the top right of the "Online Presentation" screen, the moderator is given a visual queue, that is a "Yellow" arrow, while individual users are presented with a "Red" arrow (i.e. Your Position within the "Slide Index" frame). This allows the participants to identify the position of the moderator within the presentation in relation to their own position.


**Figure 1.4 – Moderate Briefing**

*If the moderator clicks on the "Continue to Slides" button, instead of "Moderate Briefing" button, other briefing participants cannot see the moderator during the presentation.*

## Create Briefing

Any user within the portal can create a new briefing.

1. Click on the "Create a Briefing" link at the upper right-hand corner of the Briefing Menu screen (see Figure 1.0). By creating a briefing, the originator is automatically assigned as the owner.
2. Type in the name of the briefing (see Figure 1.5).
3. Click on the "Create" button. The name of the briefing is now displayed alphabetically under the Briefing Name heading.
4. To cancel and return to the "Briefings" screen, click on the "Cancel" button.


**Figure 1.5 - Create Briefing**

### Add Briefing Information

Once the "Create" button is selected, the Briefing Information screen is displayed. At this screen, the briefing owner can grant user access, upload a briefing, and enter general information for the briefing.

1. Change the name of the briefing by typing in a new name if desired (see Figure 1.6).
2. Use the drop down arrows to select the start date and time by month, date, year, and time of day.
3. Enter the conference call number if required.
4. Type in a general description up to 200 characters in the "General Information" field.
5. Select the "Orgs," "Users," "My Groups," and/or "Channels" check boxes.
6. 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.
7. 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.
8. Click on the "Search" button. The "Available Users" field is updated alphabetically by organization and then by user's last name.
9. Select the user(s) by highlighting the names.

10. Click on the  button to grant access and move users to the “Assigned Users” field.
11. Select the  button to move a user back to the “Available Users” list.
12. Choose the “Browse” button to attach a briefing (Microsoft PowerPoint only).
13. Use the drop down arrow to select a moderator if different from the briefing owner.
14. Click on the “Update Briefing” button to save any modifications and continue to view the “Add or Edit Briefing” page.
15. Select the “Finished” button to save the information and return to the Briefing Menu screen for the listing of briefings.

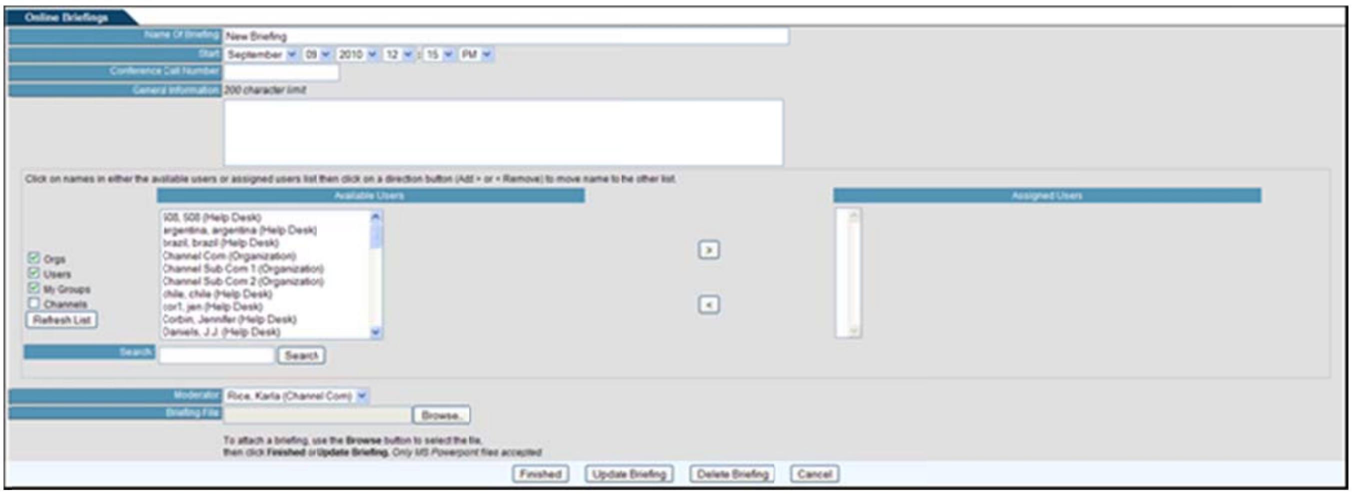



**Figure 1.6 – Briefing Information**

| | |
|---|---|
| | *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.* |

## Delete Briefing

1. Click on the “Delete Briefing” button from the Briefing Information screen (see Figure 1.6).
2. A confirmation screen is displayed (see Figure 1.7).
3. To continue with the deletion, click on the “Delete” button. Once a briefing is deleted, it cannot be retrieved.
4. To cancel, click on the “Cancel” button and return to the Briefing Menu screen.

**Figure 1.7 - Confirmation**

# Manage Briefing

## Modify

Modify is used to update/change/delete briefing information for a briefing that was already created.

1. Click on the “Modify” link under the “Manage Briefing” heading.
2. Make the appropriate changes.
3. Click the “Update Briefing” button to apply the changes (see Figure 1.8).
4. Select the “Finished” button to return to the Main Briefings screen.
5. Click on the “Delete” button to delete the briefing.  Once a briefing is deleted, it cannot be retrieved.
6. Click on the “Cancel” button to exit the screen without changes and return to the Briefing Menu screen.

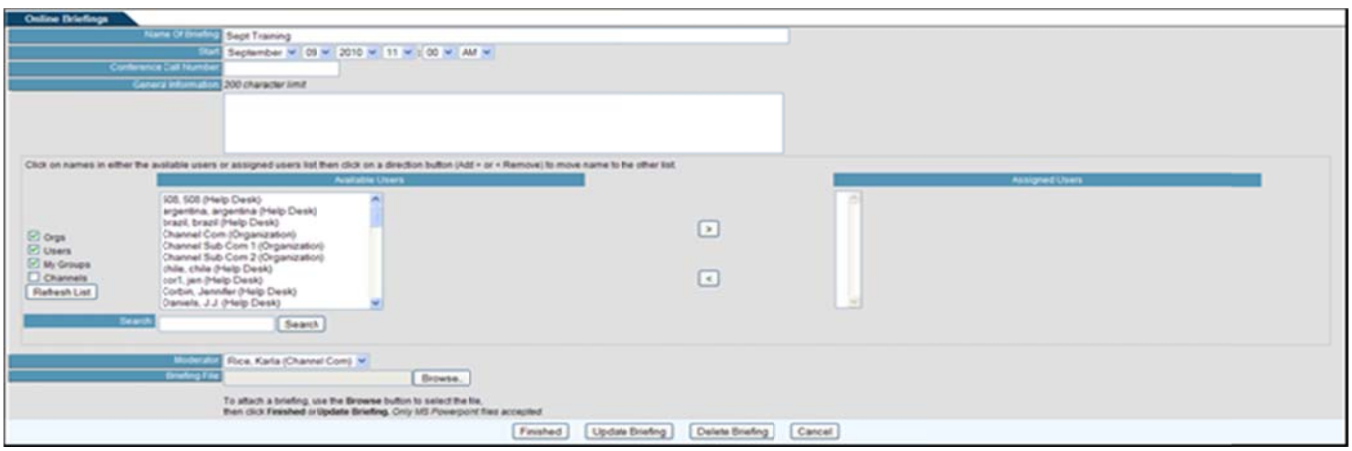



**Figure 1.8 – Modify Briefing Information**

| |
|---|
| *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.* |

## View Access

View Access area is used to view all user/orgs/groups that have access to a specific briefing.

1. Click on the “View Access” link under the “Manage Briefing” heading.
2. Select “Return to list” button to return to the Briefing Menu screen.


**Figure 1.9 – View Access**

# Frequently Asked Questions (FAQs)

1. Who has access to online briefings?

   The person who uploads a briefing determines who has access to each presentation.

2. Who can create a briefing?

   Any user can create a briefing (refer to Moderate Briefing).

3. How do I create an online briefing?

   From the portal home page, click the "Online Briefings" link. Click on the "Create a Briefing" link from the Briefing Menu screen. Enter in the title and the details for the briefing. For additional details, refer to Section 3 - Create Briefing.

4. What is the difference between the "Update Event" and the "Finished" button when creating/editing a briefing?

   The "Update Event" button will save your changes but return you to the details of your briefing. The "Finished" button will save your changes and return you to the Briefings Menu page.

5. How do I modify the access for a presentation?

   Only the briefing owner (i.e. the person who uploaded the briefing) can modify the access for a briefing. Click on the "Modify" link of the Briefing Menu screen and edit the rights of an organization, group or user. Click the "Finished" button (refer to Modify).

6. Being a regular user, how do I view the participants accessing the briefing?

   Click on the "View Access" link from the "Briefing Menu" screen. This will give you a list of all organizations and individuals that have access to the briefing.

7. How do I view a briefing?

   From the "Briefing menu" page, select the briefing name. Click on the "Continue to Slides" button to display the slides (refer to Section 2 - View Briefing).

8. When you are viewing a briefing, how do you return to the Briefing Menu screen?

   Click on the "Return to Briefing Menu" on the bottom left-hand corner of the page to return to the list of all briefings.

9. How do I change the moderator of a briefing?

   Only the briefing owner can grant users the right to moderate the briefing. From the "Add or Edit Briefing" screen, the owner uses the drop-down box to select a "Moderator" to control the briefing.

10. Can a briefing be retrieved after it has been deleted?

    No. There is a confirmation screen to make sure you want to continue with the deletion (refer to Delete Briefing).

# Section 11 – Portal Search

The Portal Search tool allows users to perform searches across all core tools and apply predefined filters. The filters include search by date, tool, author and source. The search returns results matching the user-supplied keyword from within all compartments the user belongs to.

Portal users will be able to view their search results from within the Portal Search Query interface. The list of results will be displayed with a document url, descriptive caption and information noting from which tool it was indexed. The listed results will be those from the default compartment. The links to switch compartments to view the other search results are listed at the bottom of the page.

Portal data is not indexed in a real time fashion. This means that a document that is created on the portal will not immediately show up in search results.

To access this tool, click on the "Collaboration" link from the navigation bar on the Portal Desktop, and then click on the "Portal Search" link.

## Keyword(s) Search

Keyword(s) search offers new and faster ways for portal users to find specific portal information. The user can access a range of features with one simple search.

1. Type the specific text in the "Keyword(s) Search" box (see Figure 1.0).
2. Select which Core Tools to search through.
3. By default, all tools are pre-selected. Click on the "All" link to de-select/re-select all the tools.
4. Click on the "Search" button.
5. Click on the blue underline link, which is the title of the file, to open (see Figure 1.1).
6. Click on the purple linked "Source Tool" to go directly to the indicated tool.
7. Click on the blue links below "Results for your other Compartments" to view the results in the other compartments.


**Figure 1.0 - Portal Search**

| | |
|---|---|
| | *Use specific words to describe exactly what you're looking for. More general terms will give a larger number of results.* |

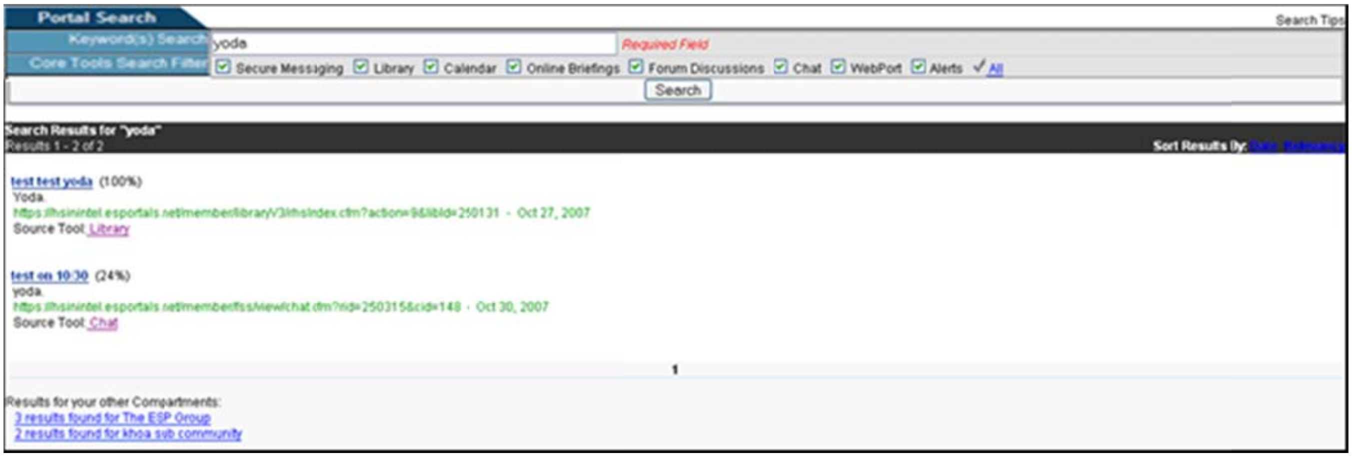



**Figure 1.1 – Keyword(s) Search Results**

## Keyword Search Errors

While conducting a full site search, a user may encounter two types of errors: “Field Length Exceeded” and “Invalid Search Criteria.”

### Field Length Exceeded

A user will get this error if they type in 60 characters or more in the search field. The error message reads, “There is a problem with your form. Please correct the errors indicated below. Field Length Exceeded” (see Figure 1.2).


**Figure 1.2 – Field Length Exceeded Error Message**

### Invalid Search Criteria

A user will receive and “Invalid Search Criteria” error if they click on the “Search” button without entering any text into the keyword search box.


**Figure 1.3 – Invalid Search Criteria Search Results**

## Search Results

The user has the ability to click on the URL Hyperlink to view the document. In addition, the user has the option to click on the "Source Tool." This will allow the user to maneuver throughout the tool from which the document originated.

1. Follow the steps listed above in "Keyword Search."
2. By default, the search results are sorted by relevancy (percentage) to the keyword provided. Click on the "Date" link to sort the results by most current date. Click on the "Relevancy" link to switch the sort order back to "Relevancy" (see Figure 1.4).
3. Click on the URL Hyperlink (see Figure 1.4).
4. Click on the "OK" button to the browser pop-up window (see Figure 1.5).
5. Click on the "Source Tool" link to be taken directly to the tool where the search result is located.

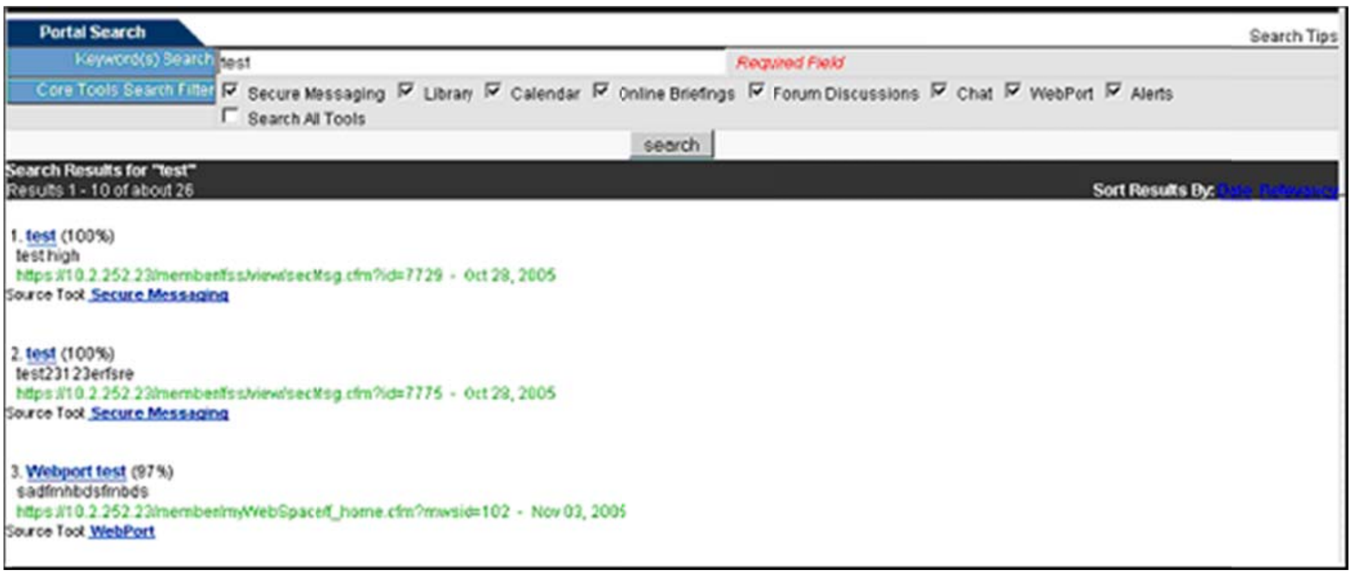



**Figure 1.4 - Search Results**

*For more than ten search results, click on "Next" located at the bottom of the page to view the next page results.*

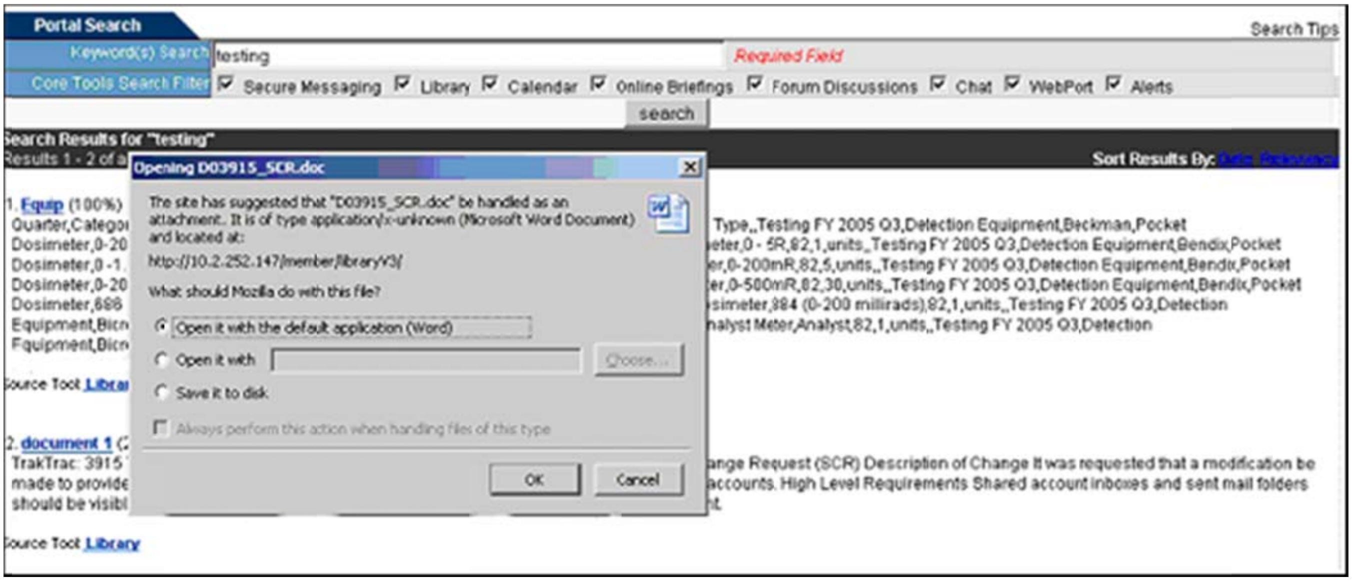
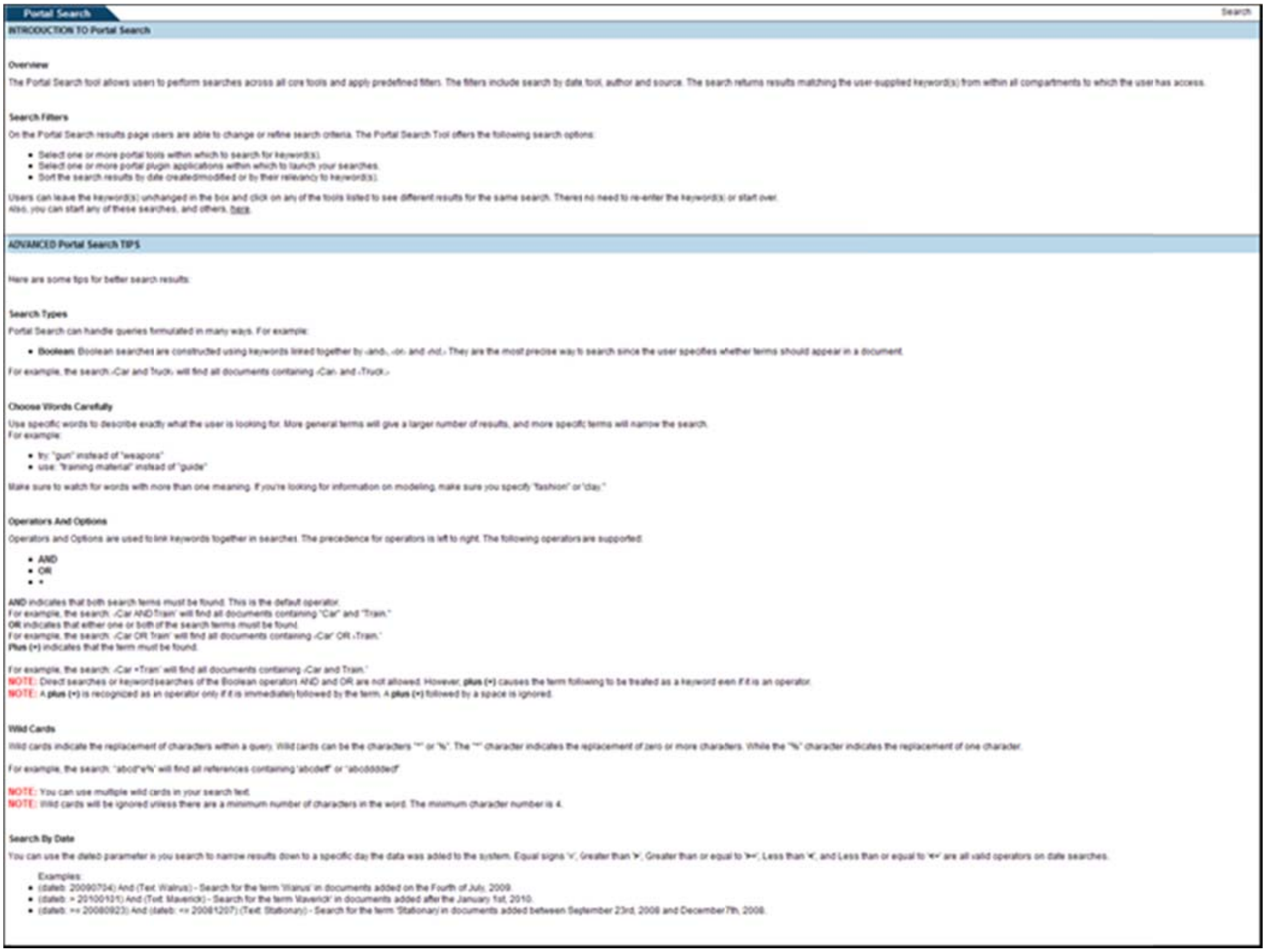



**Figure 1.5 – Browser Pop-Up Window**

## Search Tips

Portal users are offered an “Introduction to Portal Search” and “Advanced Portal Search Tips.”

1. Within the Portal Search tool, click on the “Search Tips” link (see Figure 1.0).
2. The user is presented with an “Introduction to Portal Search” and “Advanced Portal Search Tips” (see Figure 1.6).


Portal Search

Search

INTRODUCTION TO Portal Search

**Overview**

The Portal Search tool allows users to perform searches across all core tools and apply predefined filters. The filters include search by date tool, author and source. The search returns results matching the user-supplied keyword(s) from within all compartments to which the user has access.

**Search Filters**

On the Portal Search results page users are able to change or refine search criteria. The Portal Search Tool offers the following search options:

- Select one or more portal tools within which to search for keyword(s).
- Select one or more portal plugin applications within which to launch your searches.
- Sort the search results by date created/modified or by their relevancy to keyword(s).

Users can leave the keyword(s) unchanged in the box and click on any of the tools listed to see different results for the same search. Theres no need to re-enter the keyword(s) or start over.
Also, you can start any of these searches, and others, here.

ADVANCED Portal Search TIPS

Here are some tips for better search results:

**Search Types**

Portal Search can handle queries formulated in many ways. For example:

- **Boolean**: Boolean searches are constructed using keywords linked together by ‹and›, ‹or› and ‹not›. They are the most precise way to search since the user specifies whether terms should appear in a document.

For example, the search ‹Car and Truck› will find all documents containing ‹Car› and ‹Truck›.

**Choose Words Carefully**

Use specific words to describe exactly what the user is looking for. More general terms will give a larger number of results, and more specific terms will narrow the search.
For example:

- try: "gun" instead of "weapons"
- use: "training material" instead of "guide"

Make sure to watch for words with more than one meaning. If you're looking for information on modeling, make sure you specify "fashion" or "clay."

**Operators And Options**

Operators and Options are used to link keywords together in searches. The precedence for operators is left to right. The following operators are supported:

- **AND**
- **OR**
- **+**

**AND** indicates that both search terms must be found. This is the default operator.
For example, the search: ‹Car AND Train' will find all documents containing "Car" and "Train."
**OR** indicates that either one or both of the search terms must be found.
For example, the search: ‹Car OR Train' will find all documents containing ‹Car' OR ‹Train."
**Plus (+)** indicates that the term must be found.

For example, the search: ‹Car +Train' will find all documents containing ‹Car and Train."
NOTE: Direct searches or keywordsearches of the Boolean operators AND and OR are not allowed. However, **plus (+)** causes the term following to be treated as a keyword even if it is an operator.
NOTE: A **plus (+)** is recognized as an operator only if it is immediately followed by the term. A **plus (+)** followed by a space is ignored.

**Wild Cards**

Wild cards indicate the replacement of characters within a query. Wild cards can be the characters "*" or "%". The "*" character indicates the replacement of zero or more characters. While the "%" character indicates the replacement of one character.

For example, the search: "abcd*e%" will find all references containing "abcdeff" or "abcddddedf"

NOTE: You can use multiple wild cards in your search text.
NOTE: Wild cards will be ignored unless there are a minimum number of characters in the word. The minimum character number is 4.

**Search By Date**

You can use the dateb parameter in you search to narrow results down to a specific day the data was added to the system. Equal signs '=', Greater than '>', Greater than or equal to '>=', Less than '<', and Less than or equal to '<=' are all valid operators on date searches.

Examples:
- (dateb: 20090704) And (Text: Walrus) - Search for the term 'Walrus' in documents added on the Fourth of July, 2009.
- (dateb: > 20100101) And (Text: Maverick) - Search for the term 'Maverick' in documents added after the January 1st, 2010.
- (dateb: >= 20080923) And (dateb: <= 20081207) (Text: Stationary) - Search for the term 'Stationary' in documents added between September 23rd, 2008 and December7th, 2008.

**Figure 1.6 - Search Tips**

# Frequently Asked Questions (FAQs)

1. Can I get to the Portal Search screen from the Search Tips screen?

   Yes. Click on the "here" link located within the body of the search tips. You can also click on "Search" link located at the top right-hand side of the screen.

2. What should I do if I don't have access to the Portal Search?

   Contact your Site Administrator.

3. Can I access the Portal Search through the Desktop, User Directory/Find Users, Admin or Profile?

   No. You must access the Portal Search through collaboration tools area of the portal.

4. Can I search for more than one word at a time?

   Yes. The results will vary depending on your ability to view the documents.

5. How do I search for another keyword?

   From the Portal Search tool, simply enter text in the "Keyword(s) Search and click on "Search".

6. Do I have to type in text in the Keyword(s) Search field?

   Yes. The Keyword(s) Search field is required in order to receive search results. Refer to Section 2 - Keyword(s) Search section.

7. How do I view the document that I have searched for?

   Click on the link that is displayed in the results. This will allow you to open a browser to view the document. Refer to Search Results section.

8. Can I search for more than one Core Tool at a time?

   Yes. Click on the boxes located next to the Core Tools you want to search.

9. How will I know what Core Tool has returned Search Results?

   The Source Tool will be listed in the Search Results right below the URL. You can click on the Source Tool link to go to the tool specified.

10. How do I view more than ten Search Results at a time?

    Go to the bottom of the page and click on "Next" to view the next 10 Search Results.

11. Can I toggle between Date order and Relevancy order?

    Yes. You can click on Date and then click on Relevancy to toggle between each view.

# Section 12 – Profile

The “Update Profile” tool allows users to maintain their profile and preferences within the portal. Profile and preferences can be updated except for the user’s first name, last name, username and sponsoring organization. Only the Site Administrators can modify this information. Community Administrators may modify the sponsoring organization to sub-organizations within their Community. To access this tool, click on the Profile link from the Home page.

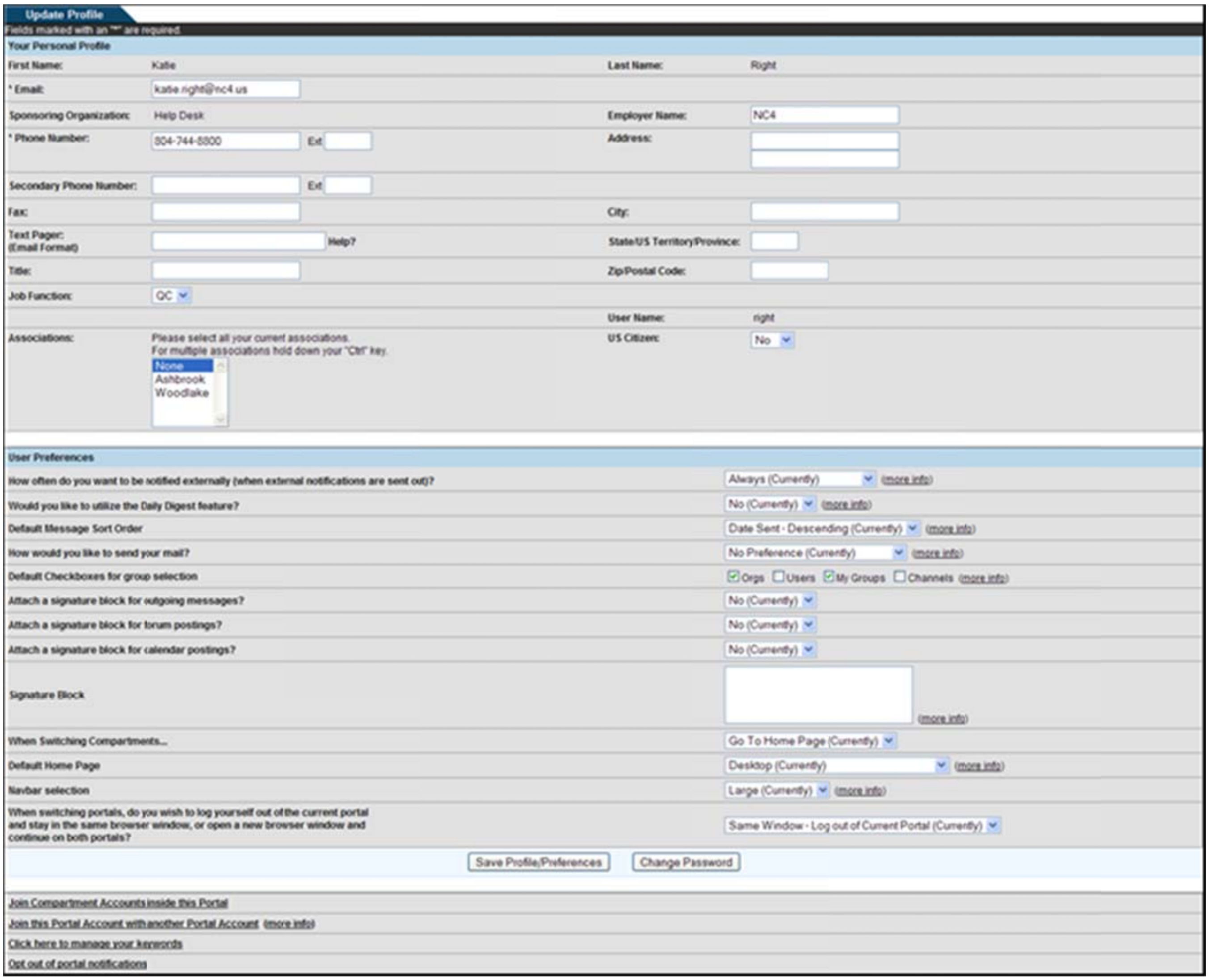



**Figure 1.0 - Update Profile**

As shown in Figure 1.0, the “Update Profile” screen shows various profile fields. To update the information, simply replace it with the new information, scroll to the bottom of the screen, and click on the “Save Profile/Preferences” button. The information entered is used by other users to contact you via the “Find Users” feature. To select an association, use the drop down arrow. For multiple selections, hold the “Ctrl” key and highlight the association names. If there are not any job functions or associations listed, that means that the administrator has not filled in this information and that it is not needed.

The first time a user registers to the portal; two security questions must be answered. These questions are not displayed in the user's profile. This information is only available to the Help Desk to assist the user with the account and reset the password. The information is not available in the user's account in the event that if an account is ever compromised, private information cannot be captured or edited.

## Your Personal Profile

This section contains your personal information (i.e. Name, Employer, Phone Number, Address, etc.). As mentioned earlier, all the information in this section may be updated except the name, sponsoring organization and username. Fields that are required will contain an asterisk.

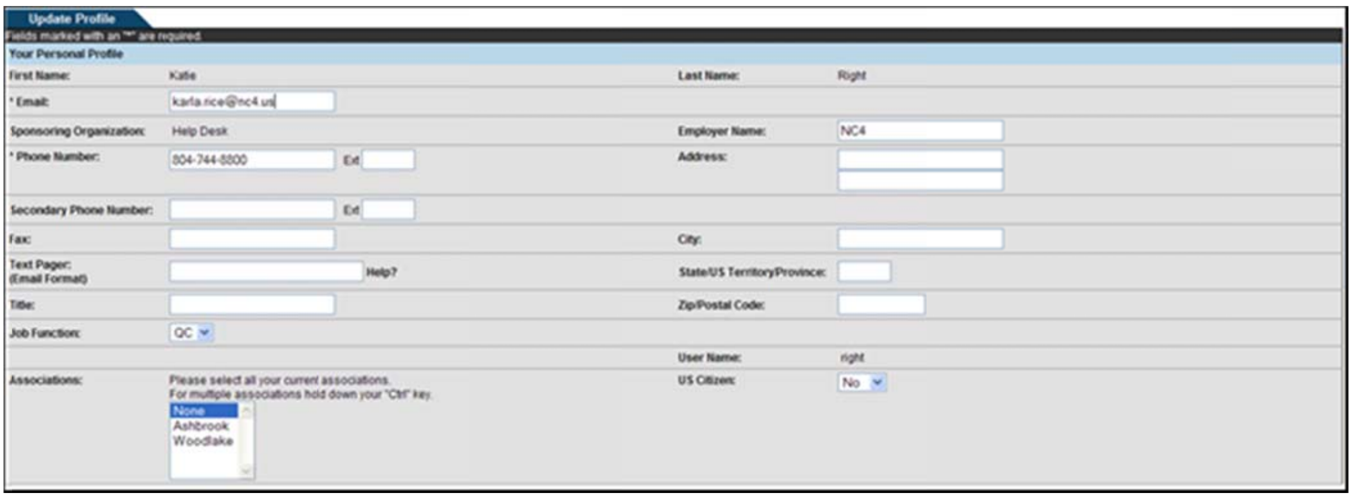



**Figure 1.1 – Your Personal Profile**

## User Preferences

Users have the ability to edit their user preferences within the portal (see Figure 1.2). Users can modify notification preferences, default group listings and signature information. After editing the preferences, click on the "Save Profile/Preferences" button to save the changes.

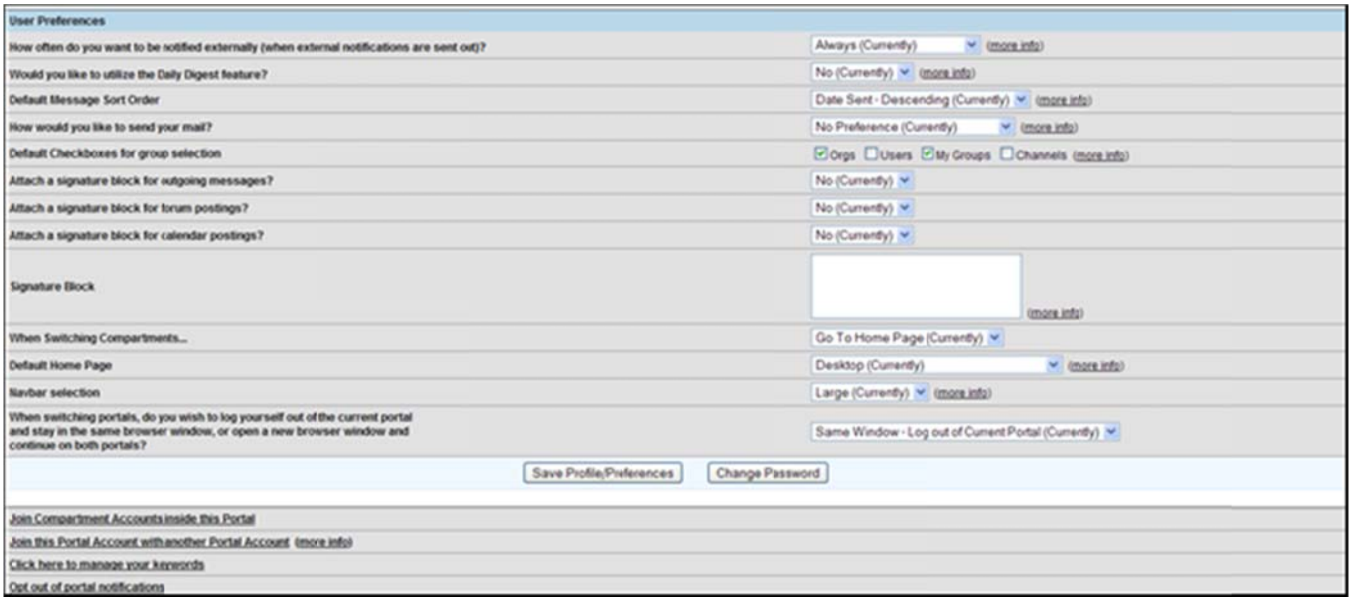



**Figure 1.2 - User Preferences**

## External Email Notifications

The first user preference allows users to receive external email notifications from Secure Messaging, Forum Discussions, Survey Wizard, etc. The options are as follows:

- Always is the default setting, which means users receive notifications every time a user selects the external email option in Secure Messaging, Forum Discussions, Survey Wizard, etc.
- Once a day only sends, at most, one external notice a day. It does not mean that a notice will go out every day. If multiple messages are sent externally, only the first one will be sent. If no external mail is sent that day, then no notifications are received; however, important emails involving account security are received.
- Once between logins only refers to receiving one notification between portal log-ins. After logging out of the portal, the user receives the first notification, for example from Secure Messaging. The user does not receive any additional messages until logging into the portal again. If the user logs in multiple times in one day, multiple external emails are received during that same period. However, if the user does not log in for several days, only one external notice is received for the entire period. Important emails involving account security are received.
- Never means no external notifications are received even if a user chooses to send an external email notification from Secure Messaging, Forum Discussions, etc. This option is recommended if the user logs into the portal often or many times a day, or is on leave for an extended period of time. Any emails involving account security are received.

## Daily Digest

This provides users with an external notification summarizing portal activities that have occurred within user's compartment/s within the previous 24 hours.

- This user can now enable or disable this feature under their profile.
- The default is set to "No" which means users will not receive any daily digest notifications.

## Sort Order of Mail

This user preference, “Set the default sort order of your messages” option, allows users to select the default sort order of their mail messages in the message center. Options include:

- Date Sent, Descending is the default setting. This option sorts messages by the date in which they were sent, from most recent to last, followed by the subject and name of the sender.
- Date Sent, Ascending orders the messages by the date in which they were sent, from last to most recent followed by the subject and name of the sender.
- Subject Descending sorts the messages by subject in alphabetical order from Z-A.
- Subject Ascending sorts the messages by subject in alphabetical order from A-Z.
- Last, First Name – Descending organizes the messages by the sender in alphabetical order from Z-A.
- Last, First Name – Ascending sorts the messages by the sender in alphabetical order from A-Z.
- Message Priority – Descending arranges the messages by High, Normal, Low priority.
- Message Priority – Ascending sorts the messages by Low, Normal, High priority.

## Group Selection Order

This preference option allows users to select the group listings that are displayed when granting user access. For many tools within the portal, individuals or groups must be selected in order to access the information. For example, in Secure Messaging, users or groups must be selected in order to receive the message. By default, the “Orgs” and “My Groups” checkboxes are selected. To change the default, click on the appropriate checkbox. Changing the default makes it easier when granting users access and updates the group listings to show any combination of the three options:

- Orgs (Organizations) provides a listing of all organizations in alphabetical order, within the user’s organizational hierarchy. The word “Organization” appears next to the organization name to indicate an entire organization within the portal.
- Users are listed alphabetically by organization and then by user’s last name. The user’s sponsoring organization appears in brackets “( )” after the user’s name to indicate an individual user.
- My Groups refers to the creation of customized groups. The words “My Group” appear in brackets “( )” next to the name of the Group.

## Signature Block

The next four options involve attaching a signature to mail messages, forum discussion postings and calendar postings. A signature usually contains the person’s name, title and contact information. To attach a signature, type in your name into the “Signature Block”, and then select the “Yes” option from the drop down box for the messaging, forum, or calendar tool. By default, the signature options are set to “No”. The information entered into the “Signature Block” area is not attached until one of the options is selected.

## Home Page

The “Home Page” preference is used to set the location or application that starts when logging into the portal or selecting the “Home” link. Normally, the system desktop is the default; however, any of the enabled tools system can be selected by using the drop down arrow. From the pull-down list, click on the desired option and click on the “Save Profile/Preferences” button.

## Use Small Nav Bar

The navigation (nav) bar is on the top of each page to navigate through the portal. As shown in the example in Figure 1.3, by default, the large, icon based tool bar is enabled. To change the default, click on the drop down arrow and select the appropriate nav bar from the pull-down list (see Figure 1.1). Once changed, click on the “Save Profile/Preferences” button at the bottom of the page.


**Figure 1.3 - Nav Bar Example**

## Join Compartment Accounts

This option allows users to merge all of their portal accounts into one account. By joining accounts, a user only has to login with one username and password in order to access all organizations. Once the accounts are joined, the user can simply toggle between each organization from the compartment menu at the top of each page.

1. Click on the link “Click here to join multiple accounts.”
2. A list of all current accounts (i.e., compartments) is displayed (see Figure 1.4).
3. Enter username and password from the other account to combine accounts and establish log-in defaults.
4. Click on the “Get New Account” button to submit the request.

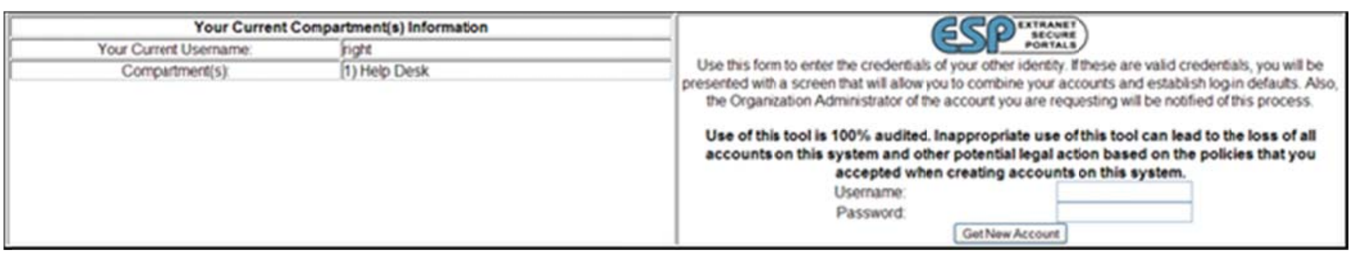



**Figure 1.4 - Join Accounts**

5. If the login credentials are valid, all accounts that match the username and password are accepted (see Figure 1.6).
6. Select the default compartment by using the drop down arrow.
7. Click on the “Accept” button. The default compartment appears for each login session.
8. Click on the “Cancel” button to cancel the action.

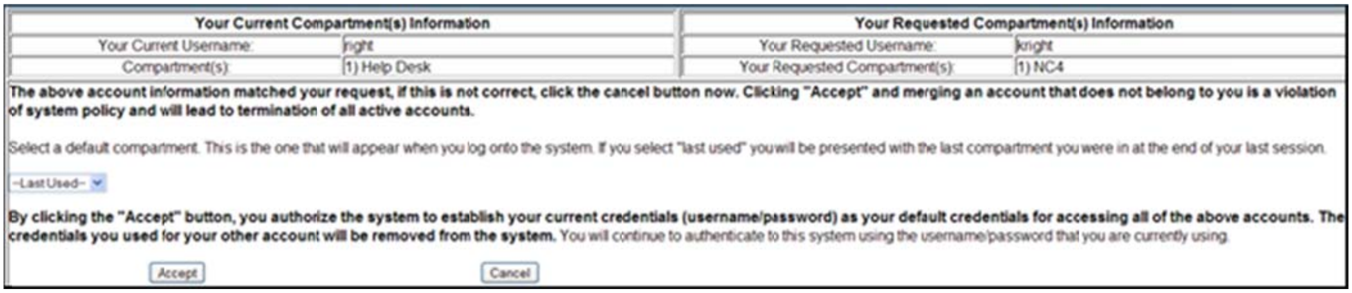



**Figure 1.5 - Join Accounts Acceptance Page**

9. A new "Compartment Bar" is displayed just below the navigation bar.
10. Use the Username displayed on the left as the log-in Username.
11. Continue to use the same password to access the account. The old credentials are no longer active.
12. At the new “Compartment Bar”, use the drop down arrow to switch back and forth between compartments and click on the "Go" button.

*The Compartment bar provides notices of new mail messages, new chat invitations, library documents, tasks, etc.*

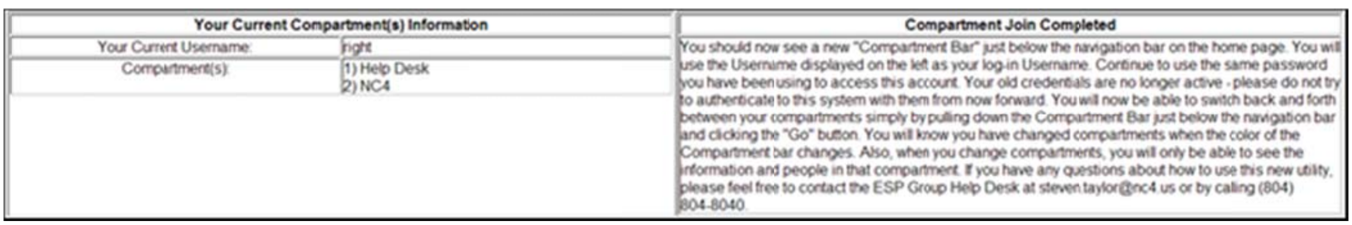



**Figure 1.6 - Join Accounts Compartment Menu**

## Default Compartment

At the “User Preferences” screen, use the drop down arrow to choose which compartment appears for each login session. Click on the “Save Profile/Preferences” button (see Figure 1.2).

## Join Portal Accounts

If users have accounts on multiple ESP-sponsored portals, this option allows them to merge the accounts into one. By joining accounts, a user only has to login with one username and password in order to access all portals. Once the accounts are joined, the user can simply toggle between each portal from the dropdown menu at the top of each page.

1. Click on the link “Click here to join together Portal Accounts.”
2. A dropdown list of applicable portals is displayed (see Figure 1.8).
3. Use the drop down arrow to choose which portal to join accounts with.

4. Enter username and password from the other account to combine accounts and establish log-in defaults.
5. Click on the “Continue” button to submit the request.

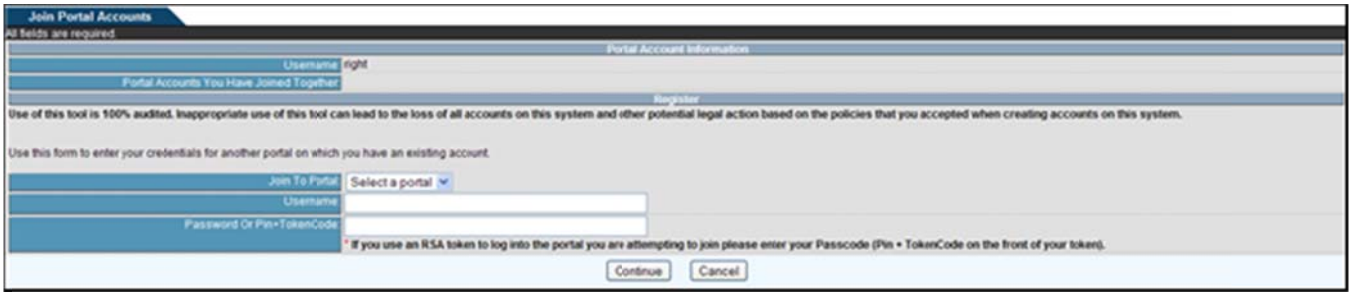



**Figure 1.7 - Join Portal Accounts**

## User Keywords

The User Keywords preference allows a user to define keywords that will trigger an automated alert when portal search finds a match. For example, if a user has the keyword “test” defined and a document is uploaded into the library with “test” either in the title or body of the file, then an automated alert is sent to the user.

The search will be performed across all compartments to which the user belongs; keywords cannot be defined on an organization-by-organization basis. There is no limit to the number of keywords that are defined.

The keyword search is performed each night, so the alerts will not be automatic but should arrive within 24 hours of creation.

The User Keywords preference is only visible to users when this preference is enabled portal-wide by a Site Administrator.

### Define Keywords

1. Click on the “Click here to manage your keywords” link (see Figure 1.2).
2. Click on the “New Keyword” text to enable the text field and type in the keyword (see Figure 1.8).
3. Select which tool(s) you would like the keyword search to be applied.
4. Click on the “Save Changes” button.

### Delete Keywords

1. Select the checkbox located under the trashcan icon to the left of the keyword to be deleted (see Figure 1.8).
2. Click on the “Save Changes” button.

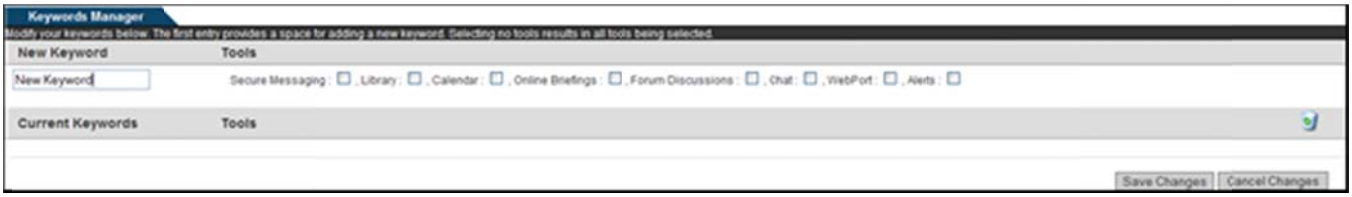



**Figure 1.8 – Keyword Manager**

## Search Results

1. When the keyword search makes a match, a notification is sent to the user (see Figure 1.9).
2. Click on the URL link within the notification to access the search results.
3. After entering your logon information, you are taken to the search results within the Portal Search tool (see Figure 1.10).
4. The results listed first are those that are within the default compartment. The blue links at the bottom of the results page are links to the results within the other compartments. After clicking on that link, the user is switched into that compartment and presented with those search results.


**Figure 1.9 – Keyword Search Alert**

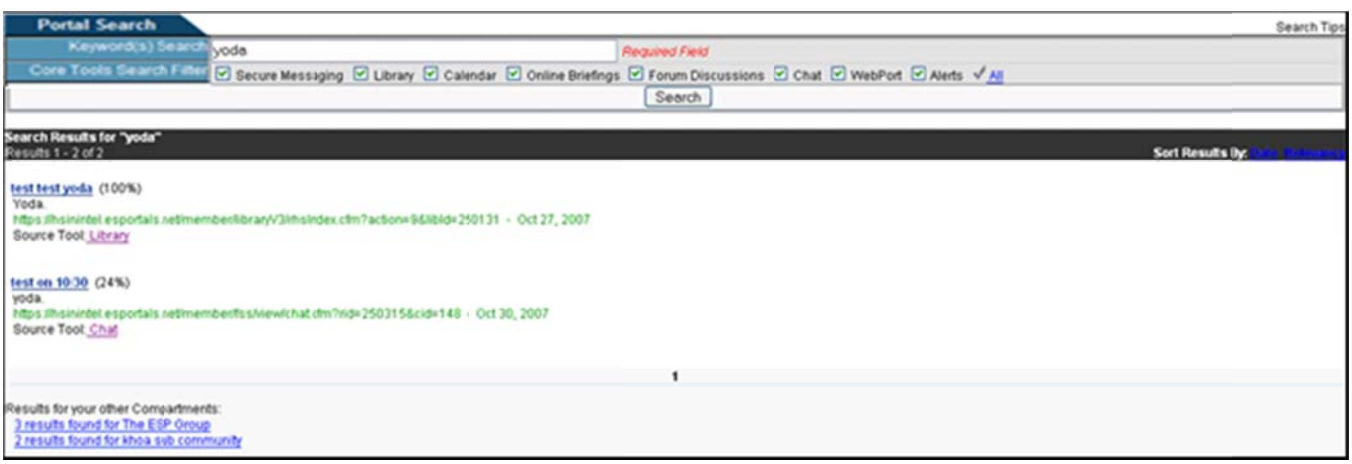



**Figure 1.10 – Keyword Search Results – Portal Search**

## Portal Notifications

The Portal Notifications preference allows a user to turn off external notifications on a tool-by-tool basis. A user could decide they want to receive notifications when they receive a secure message but not if a new document is uploaded to the library. A user could also select to receive no external notifications.

1. Click on the "Click here to opt-out of portal notifications" link (see Figure 1.2).
2. By default, notifications for all core tools are turned on. Select the "Off" radio button to opt-out of receiving any external notifications generated by that tool (see Figure 1.11).
3. Click on the "Submit" button.

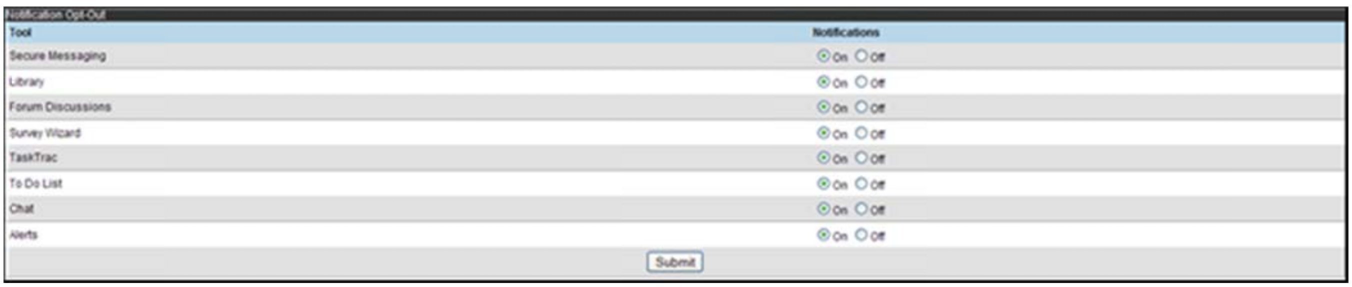



**Figure 1.11 – Notification Opt-Out**

# Change Password

The "Personal Profile" screen can be used to change the log-in password. Click on the "Change Password" button at the bottom of the screen (see Figure 1.2). As shown in Figure 1.1, type in the old password and then enter the new password in the "New Password" and "Verify Password" fields. Click on the "Change Password" button. To cancel, select the "Cancel" button and return to the previous screen.

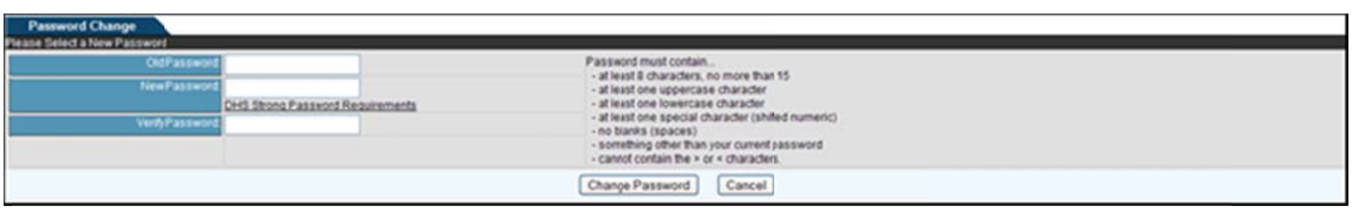



**Figure 1.12 – Change Password Screen**

| | |
|---|---|
| | *Passwords automatically expire every 90 days, and the system notifies users ten days before expiration. Passwords must contain at least eight characters and no more than 15. At least one uppercase, one lowercase, and one special character must be included. No blanks can be used.* |

# Frequently Asked Questions (FAQs)

1. Who has access to change my account information?

   You can change your account information as well as the Organizational or Community Administrators and the Support Center. Only you can change your preferences.

2. Why does my account information screen take so long to load?

   The protected fields, size of page and complexity of the accounts affect how long it takes for the account information to appear.

3. How do I make changes to my account information?

Click on the “Update Your Profile / Preferences” link on the Home page. Verify the information included on the “Update Profile” screen is correct. If changes are needed, refer to Your Personal Profile The first time a user registers to the portal; two security questions must be answered. These questions are not displayed in the user’s profile. This information is only available to the Help Desk to assist the user with the account and reset the password. The information is not available in the user’s account in the event that if an account is ever compromised, private information cannot be captured or edited.

   Your Personal Profile.

4. How do I change my password?

   At the “Update Profile” screen, click the “Change Password” button. Continue to follow the steps in the Your Personal Profile

5. How do I turn off mail notifications so I don’t receive external emails?

   Under “User Preferences”, scroll to the heading, “How often do you want to be notified externally (when external notifications are sent out)”. Use the drop down arrow and select “Never” as the default. Click on the “Save Profile/Preferences” button to save the change. For additional information, refer to

   External Email Notifications.

6. Can I arrange notifications so I receive my messages once daily?

   Yes. As described in #5, use the drop down arrow to select the “Once Daily” option. Refer to

   External Email Notifications.

7. How do I change the default sort order of my mail?

   Under the heading, ‘set the default sort order of your mail”, use the drop down arrow to select the sort order (refer to Sort Order of Mail).

8. What is the default group selection?

   The default group selection affects the way you assign rights to your content within the portal. When you are assigning rights, the access list shows your Organization and My Group listings. You can change the default to show only Organizations, Individuals, My Groups, or any combination (refer to Group Selection Order).

9. What steps do I take to attach a signature to mail messages, forum discussions, or calendar postings?

   Within the “Signature Block”, type your signature information. Go to the heading, “Attach a signature block for outgoing mail messages?”, and select the “Yes” option from the drop down box. For additional instructions, refer to Signature Block.

10. How do I delete the signature information so that a signature is not attached to any information I send in the portal?

The signature box cannot be completely deleted once you enter information into the box. Instead, just select the "No" option for attaching the signature to outgoing mail, forum postings and calendar postings and your signature will not appear on any of your content. You can also change the signature information by typing over the previous signature and selecting the "Save Profile/Preferences" button.

11. What is the benefit of using a small or large navigation (nav) bar?

    The navigation bar at the top of each page contains graphics that may slow down your connection speed when heavy internet traffic occurs. By choosing the small navigation bar option, the graphics are disabled when toggling between each screen of the portal.

12. How do I join multiple accounts?

    To join your multiple accounts, click on the link, "Click here to join multiple accounts". For detailed instructions, refer to Join Compartment Accounts.

13. If I have multiple accounts, can I update all my accounts at once?

    Yes. You can update all accounts with the changes by verifying that the last preference option is selected. You can also choose to only update the current account by deselecting the default and then clicking on the "Save Profile/Preferences" button (refer to

    Join Portal Accounts).

# Section 13 – Secure Messaging

The core tool, Secure Messaging, is used for composing, sending and receiving secure email within a user's organizational hierarchy. Users can also create customized mail groups for sending messages, attach files securely within the message, view and search for messages, and manage folders. There are several "Send" options, which allow users to send a message unencrypted or encrypted to the recipient's external email or send no external notification at all.

## Inbox

To access Secure Messaging Inbox, select the "Secure Messaging" link from the Home page, under the Collaboration Tools menu or from the navigation bar.


**Figure 1.0 – Secure Messaging Main**

### Read

Depending on the send option chosen by the originator, users are notified of a secure message through their external email or through the portal. From the external email, the user can click on the URL link to view the secure message. If logging onto the portal, the user can retrieve the message by selecting the "Secure Messaging" link under Collaboration Tools.

Users can view messages that they have received, sent, saved as draft, or archived. The "Inbox" folder automatically displays received and newly received messages. New messages are bolded. The number next to the "Inbox" folder indicates the number of new messages received. To view messages in the "Sent" or "Draft" folder, click on the "Sent" or "Draft" link. Messages are identified by subject, recipient, priority, and date and time received (see Figure 1.1). To view additional messages on the screen, select the "Change Size" down arrow and the appropriate number, and click on the "Change Size" button. The screen is automatically updated with the number of messages.

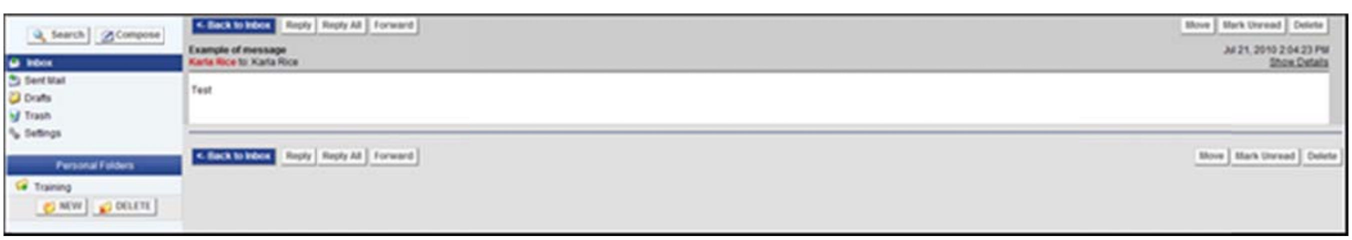



**Figure 1.1 - Read Messages**

To view a message, click on the subject title. The message is displayed at the bottom of the screen indicating recipient type (i.e., “TO”, “CC” “BCC”), date and time, who sent the message, subject title, and the actual message (see Figure 1.1).

## Eyes Only

Regardless of mail folder, messages identified for “Eyes Only” are marked with a red “eye” icon and “ ” by the subject title. This feature ensures that the recipient is the only person that views the message, and it removes the ability for the recipient to send it to others. If the recipient tries to print the message, an error states the message is not for distribution. To view an “Eyes Only” message, click on the subject title and the “OK” button for the security warning for file encryption, and a secure window is opened with the message (see Figure 1.2).

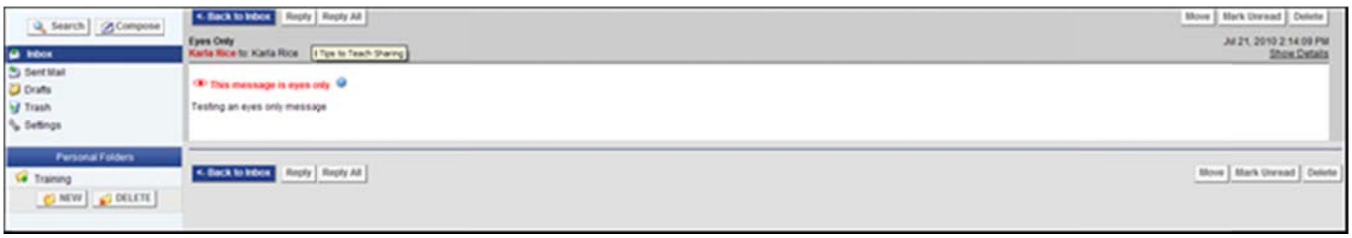



**Figure 1.2 - Eyes Only**

## Reply

After reading the message, the user can respond to the originator.

1. Click on the “Reply” button. To reply to all recipients, click on the “Reply All” button (see Figure 1.2).
2. Click on the “OK” button for the security warning for file encryption, and the “Send Message” screen is displayed.
3. When replying to the originator, the “To” field automatically contains the originator’s name. If responding to all recipients, the “To” field includes the recipients’ by individual users, groups, or organizations.
4. When replying, the user can add recipients, change the subject title, add attachments, and/or type in a reply to the original message.
5. Select the “Send” or “Save Draft” option (see the Compose section for detailed instructions).
6. Click on the “Send” button.
7. A confirmation screen appears.
8. Click on the “Close Window” button.

Replying to messages marked as “Eyes Only”, the “Send Message” screen does not include the option to attach files or send the message unencrypted. Since the message is designated as “Eyes Only,” the list of recipients cannot be changed. The subject title can be altered.

## Delete

9. Within the inbox or other folders, select the message to be deleted and click on the delete button.  If the message is open, click on the delete” button.  With both options, the message is sent to the trash folder (see Figure 1.2).
10. To delete more than one message, select the appropriate checkboxes and click on the delete button.

## Move

Messages within the “Inbox”, “Sent” or any personal folder can be moved to other folders.

1. Select the checkbox next to the message and click the move button. If the message is open, click on the move button above the body of the message (see Figure 1.2).
2. If more than one message is to be moved, select the appropriate checkboxes and click on the move button.
3. Select the folder to which the message is to be moved (see Figure 1.3).
4. Click on the move” button to move the message to that folder, or click on the do not move  button to retain the message in the existing folder.

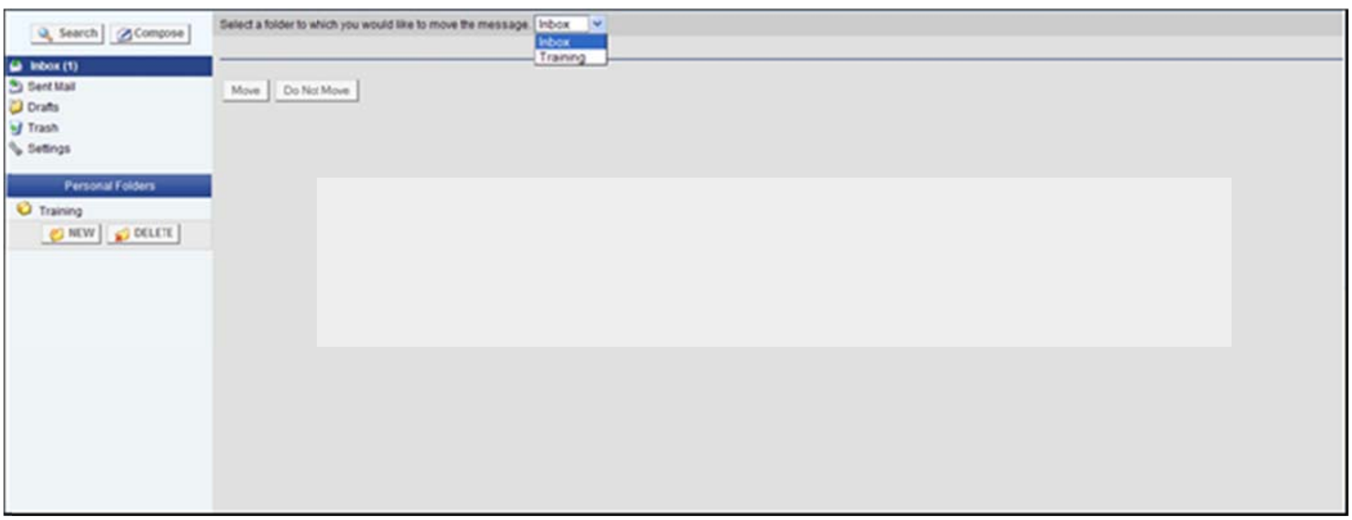



**Figure 1.3 - Move a Message**

## Mark Read/Unread

Messages within the Inbox, Sent Mail, Drafts, Trash or Personal folders can be marked as read or unread.  If a message has not been read (unread) then it will appear bold but if it still needs to be read then it will no longer appear bold.  Once you go into a message to read it will no longer appear as unread.

1. Click on mark unread button if you have a message open but want to keep it as unread.
2. If more than one message is to be marked as read/unread, select the appropriate checkboxes and click on the mark read or unread button.

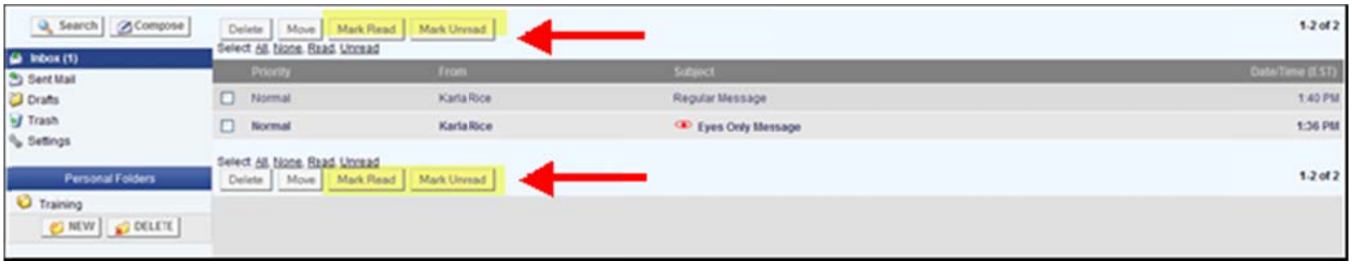



Figure 1.4 – Mark as Read/Unread

# Compose

There are three parts when composing a message: Address book, Message and Security Settings (see Figure 1.5). To compost a message, first you must click on the compose message button.

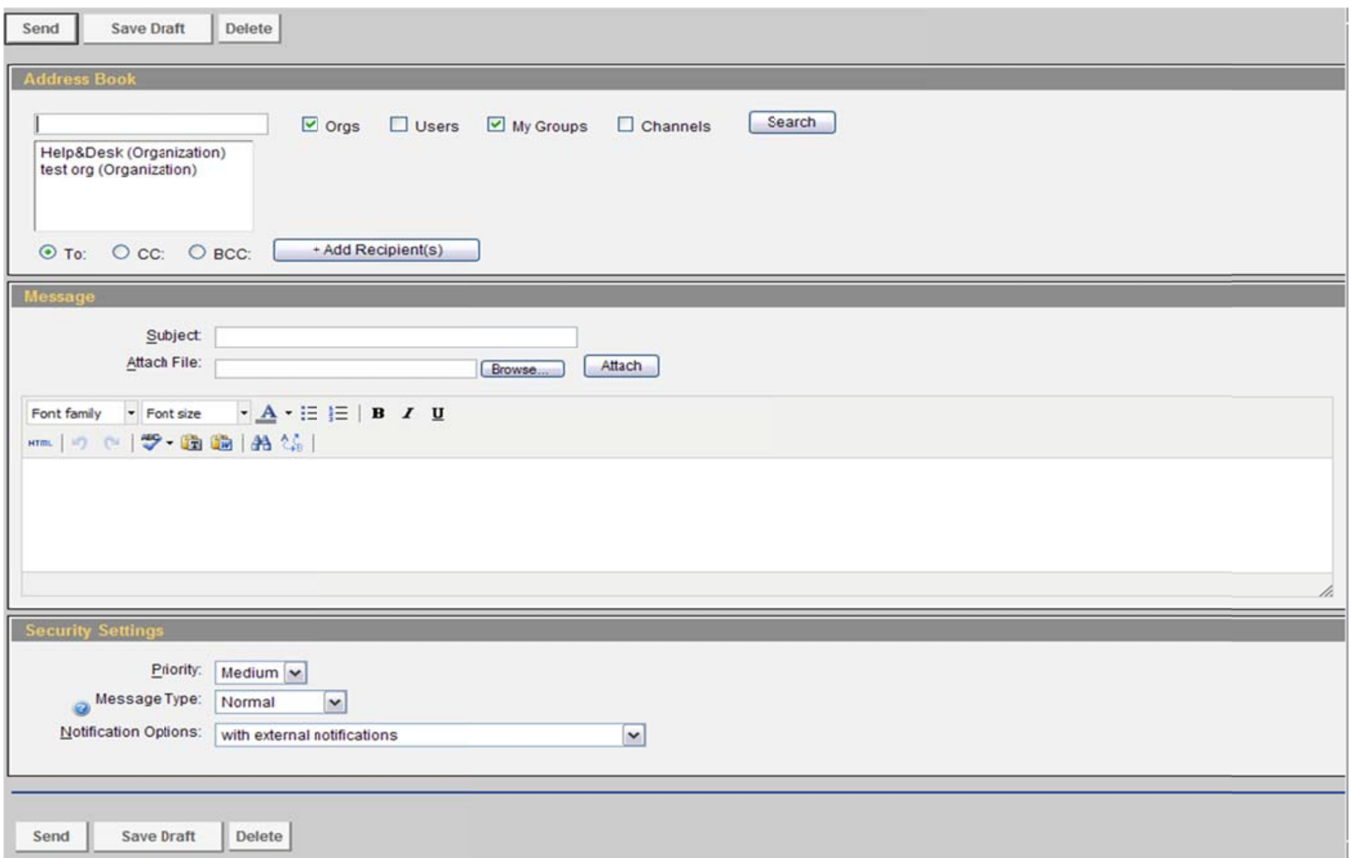



Figure 1.5 – Compose Message

## Address Book

1. Select the “Orgs,” “Users,” “My Groups,” and/or “Channels” check boxes under the address book (see Figure 1.5). By default, “Orgs” and “My Groups” are checked. Go to “Update Profile/Preferences” or “My Profile” to change this setting (see the “Update Profile/Preferences User Guide” for more information).

2. Type in the name of a user, group, or organization in the search field to find a recipient. 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.
3. Click on the “Search” button.
4. Highlight the recipient(s) from the address book, select the “TO”, “CC”, or “BCC” radio box, and click on the “+ Add Recipient(s)” button. The “Recipients” field is automatically updated with the selection.
5. To remove a recipient, select the “- Remove Recipient(s)” button and the “To” field is updated.

*The administrator on the portal may set a “message throttling” threshold, or a minimum on how many users a secure message can be sent to at one time.*

*The user will receive an error message if too many users have been selected as recipients. The message will inform the user that the message threshold has been exceeded, what the value of the message threshold has been set to, and which organization set the message threshold.*

## Message

1. Type the subject name in the “Subject” field.
2. 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. To remove the attachment, click on the “Remove Attachment” button.
3. Type the message. There are a wide variety of options when it comes to formatting a message (refer to Formatting Options section).

### Formatting Options

Here is a list of all the user options when formatting text in messages:

- Font Family – used to change the look of the font itself. The following fonts are available: Andale Mono, Arial, Arial Black, Book Antiqua, Comic Sans MS, Courier New, Georgia, Helvetica, Impact, Symbol, Tahoma, Terminal, Times New Roman, Trebuchet MS, Verdana, Webdings and Wingdings.
- Font Size – used to change how big or small the text will appear. The following 7 font sizes are available: 8pt, 10pt, 12pt, 14pt, 18pt, 24pt and 36pt
- Font Color – used to change the color of the text itself.
- Bulleted List – used to create bullet icons in front of a list of items with no specific order.
- Numbered List – used to create number ordered list for items with a specific order.
- Bold – used to display text in a thicker font to make it stand out and draw the reader's attention it.
- Italic used to slant text to the right to draw the reader’s attention to it.
- Underline – used to display a line underneath text to place special emphasis on the text.
- Edit HTML Source – used to input/edit HTML code into the message.
- Undo – used to undo the last action that took place.
- Redo – used to repeat that last action that was undone.

- Spellcheck – used to make sure all the text in your message has the correct spelling. Available in 11 languages.
- Paste as Plain Text – used to insert text and strips out prior formatting.
- Paste from Word – used to insert text copied from word into a message.
- Find – used to find specific words within the message.
- Find/Replace – used to find a specific word and then replace that word with another word.

### Security Settings

1. Click on the appropriate priority level radio box for the message (i.e., High, Normal, or Low).
2. Select the message type (Normal, Eyes Only or Portal Internal) in the drop down. The "Normal" option indicates that the message has no special handling instructions. The "Eyes Only" option indicates that the message is intended for the original recipients only and should not be copied or redistributed without consent from the original sender. It also limits features such as copy, paste, forward and print. This option also disables the ability to send a message unencrypted to the recipient's external email address and attachments. The "Portal Internal" option indicates that the message is intended to remain in the portal to be visible only by other portal users. Recipients will be able to reply to and forward the message inside the portal and the recipient will not be able to select the option to send the message externally.
3. Select the appropriate send option and click on the "Send" button.
4. Once the message is sent, a confirmation screen is displayed (see Figure 1.6).

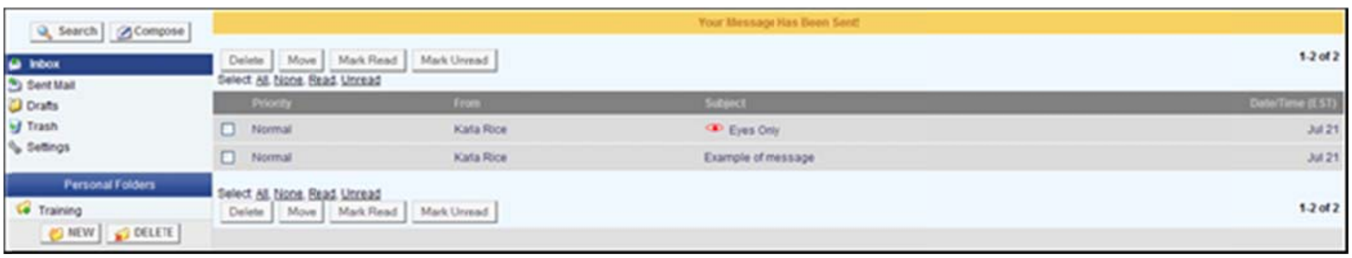


**Figure 1.6 - Sent Confirmation**

## Search

All users may search for messages they have received, sent, saved as drafts, or archived to a personal folder.

1. Click on the search button.
2. The search message screen is displayed (see Figure 1.7).
3. Use the drop down arrow for the "From" field to select the sender's name.
4. Fill the subject and/or keyword(s).
5. Click on the specific folder radio box. If selecting the "Folder" option a specific folder must be selected in the dropdown.
6. Click the "Submit" button for search results.

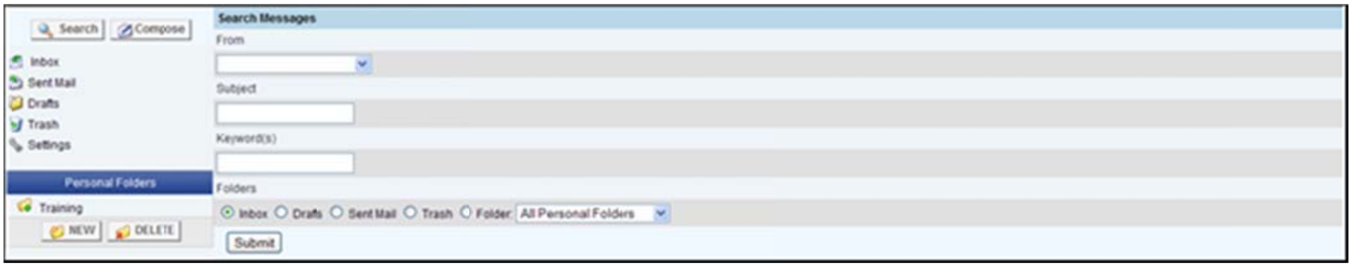



**Figure 1.7 - Search Messages**

## Sent Mail

Once a user composes and sends a message, it is automatically saved to the “Sent Mail” folder. To view a message, click on the subject title. The message is displayed on the screen indicating recipient type (i.e., “TO”, “CC” “BCC”), date and time, who sent the message, subject title, and the actual message (see Figure 1.8).


**Figure 1.8 – Sent Mail**

## Drafts

When a user composes a message and clicks on the “Save Draft” button, it is automatically saved to the “Drafts” mail folder.

### Edit Draft

1. Click on the “Drafts” folder. The draft messages are displayed by subject title, originator, priority, and date and time.
2. Click on any part of the message to pull it up.
3. Click on the “Edit Draft” button (see Figure 1.9).
4. The message will be displayed.
5. Proceed with editing the draft, selecting recipients, attaching files if desired, and clicking on the appropriate send option (see Compose for more instructions). To delete a draft message, select the delete button.

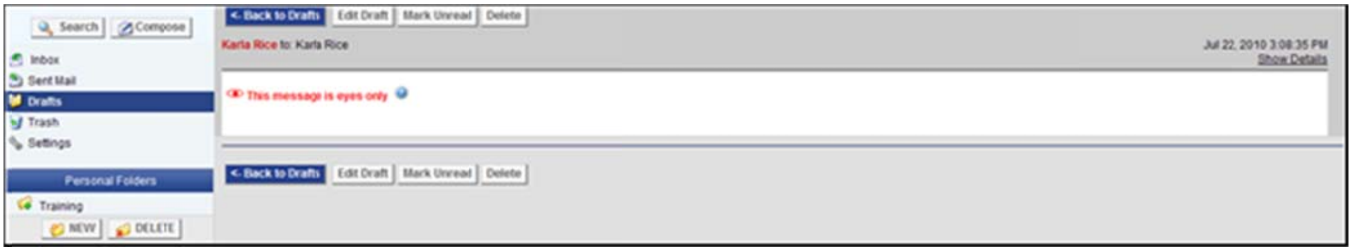



**Figure 1.9 - Edit Drafts**

## Trash

Once a user deletes a message, it is automatically saved to the “Trash” folder. To view a message, click on one of the message links. The message is displayed on the screen indicating recipient type (i.e., “TO”, “CC” “BCC”), date and time, who sent the message, subject title, and the actual message (see Figure 1.10). You may delete each message individually from the trash folder, select “Empty Trash” link to purge all documents in the folder or you can just leave them in the folder and they will be automatically deleted after 30 days.

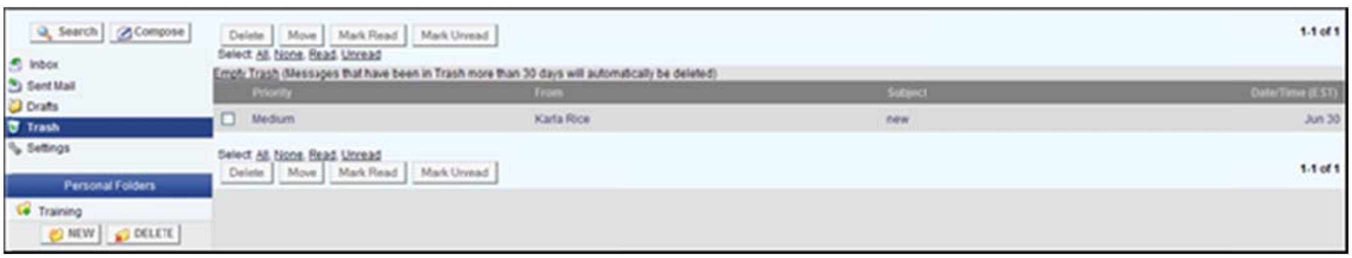



**Figure 1.10 – Trash**

## Settings

Users have the ability to manage their mail preference settings. The mail preference settings are as follows:

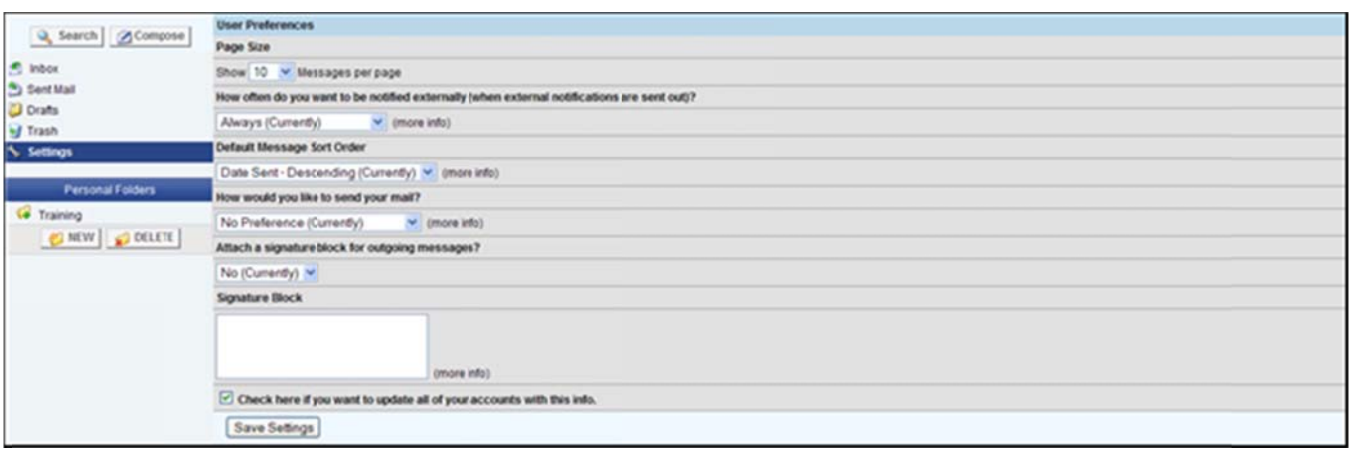



**Figure 1.11 – Settings**

## Page Size

This option allows users to select how many messages they would like to view per page. Options are: 10, 25, 50 or 100.

## External Email Notifications

This user preference allows users to receive external email notifications. The options are as follows:

- Always (Default) - users receive notifications every time a user selects the external email option in Secure Messaging, Forum Discussions, Survey Wizard, etc.
- Once a day only - sends, at most, one external notice a day. It does not mean that a notice will go out every day. If multiple messages are sent externally, only the first one will be sent. If no external mail is sent that day, then no notifications are received; however, important emails involving account security are received.
- Once between logins only - refers to receiving one notification between portal log-ins. After logging out of the portal, the user receives the first notification, for example from Secure Messaging. The user does not receive any additional messages until logging into the portal again. If the user logs in multiple times in one day, multiple external emails are received during that same period. However, if the user does not log in for several days, only one external notice is received for the entire period. Important emails involving account security are received.
- Never - means no external notifications are received even if a user chooses to send an external email notification from Secure Messaging, Forum Discussions, etc. This option is recommended if the user logs into the portal often or many times a day, or is on leave for an extended period of time. Any emails involving account security are received.

## Sort order of mail

This user preference, “Default message sort order” option, allows users to select the default sort order of their mail messages in the message center. Options include:

- Date Sent – Descending (Default) - This option sorts messages by the date in which they were sent, from most recent to last, followed by the subject and name of the sender.
- Date Sent – Ascending - Orders the messages by the date in which they were sent, from last to most recent followed by the subject and name of the sender.
- Subject – Descending - Sorts the messages by subject in alphabetical order from Z-A.
- Subject – Ascending - Sorts the messages by subject in alphabetical order from A-Z.
- Last, First Name – Descending - Organizes the messages by the sender in alphabetical order from Z-A.
- Last, First Name – Ascending - Sorts the messages by the sender in alphabetical order from A-Z.
- Message Priority – Descending - Arranges the messages by High, Normal, Low priority.
- Message Priority – Ascending - Sorts the messages by Low, Normal, High priority.

## Send Mail Preference

- No Preference (Default) – Preference not automatically marked off.  User may choose preference while in tool.
- Externally with subject and body - The entire message will be sent to the recipient's external mail address.
- Externally with subject - A notification with the subject will be sent to the recipient's external mail address. The body of the message will not be sent.
- Externally without subject - A notification will be sent to the recipient's external mail address. The body and subject of the message will not be sent.
- Internally - The message will be delivered to the user inside of the portal.

### Signature Block

This option allows the user to attach a signature to mail messages.  A signature usually contains the person's name, title and contact information.   To attach a signature, type in your name into the "Signature Block", and then select the "Yes" option from the drop down box.   By default, the signature options are set to "No".  The information entered into the "Signature Block" area is not attached until one of the options is selected.

### Update All Accounts

Select this checkbox if you have multiple compartments within a portal and would like to update each account with the new preference settings.

## Personal Folders

Users have the ability to organize messages and manage mail folders by adding or deleting personal folders and archiving messages to personal folders.

### New Folder

1. Click on the "New" button.
2. Type in the folder name (see Figure 1.12).
3. Use the drop down arrow to select "None" as the parent folder.
4. Click on the "Add Folder" button.
5. Click on the "Cancel" button to cancel the action.
6. The new personal folder is listed under the "Personal Folders" heading.  Once the folder is created, the user can move messages into this folder for organization or reference.

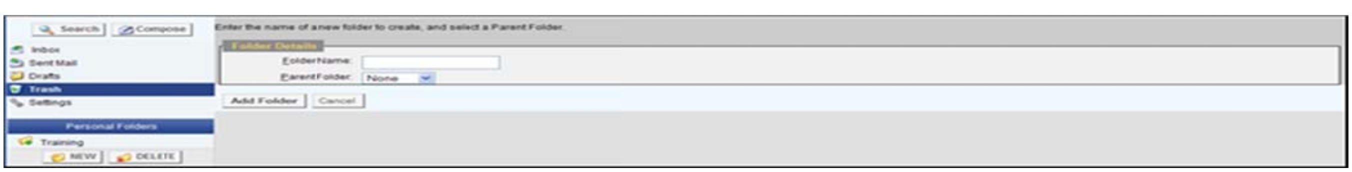



**Figure 1.12 - Add Folder**

## Subfolders

Subfolders can be created under a parent folder.

1. Click on the “New” button.
2. Use the drop down arrow to select the parent folder.
3. Type in the name of the subfolder.
4. Click on the “Add Folder” button.
5. Click on the “Cancel” button to cancel the action.
6. To expand the parent folder and view the subfolders, click on the “+” within the folder icon. The subfolders are displayed and a “-” is shown within the parent folder icon .

## Delete

1. Click on the “Delete” button (see Figure 1.13).
2. Select the personal folder to be deleted by using the drop down list box to highlight the folder name.
3. To delete, click on the “Delete Folder” button, or select the “Cancel” button to cancel the deletion.

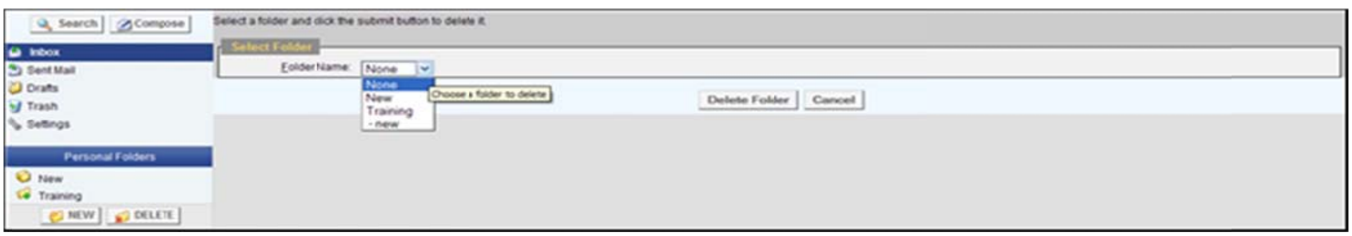



**Figure 1.13 - Delete Folder**

# Frequently Asked Questions (FAQs)

1. What steps do I take to compose and send a message?

   Select the "Compose" button on the top left hand side of the screen. Complete the message screen. For additional instructions, refer to Section 3 – Compose.

2. How do I verify that my message was sent?

   After you select a "Send" option and click on the "Send" button, a confirmation screen displays the message was sent. Click on the "Sent Mail" folder link to view your sent messages.

3. How do I send a confidential message so only the recipient can view it?

   The feature, "Eyes Only" ensures that the recipient is the only person that views the message and removes the ability to forward or print the message. For more information, refer to Eyes Only.

4. Once I have received a message in my "Inbox" and there are several recipients listed, how do I reply to only one recipient?

   You can respond to the originator by clicking on the "Reply" link. Refer to Reply section of this chapter.

5. When I am in my "Inbox" folder, I see a list of messages. How do I view the actual message?

   You can click on the name of the message and the message is displayed at the bottom of the screen. Refer to Read section for additional information.

6. If I delete a message from Trash, can I retrieve it later?

   Once you confirm your deletion, you cannot retrieve the message for later use. It is permanently removed.

7. How do I compose a message to be completed later?

   At the "Send Message" screen, click on the "Save Draft" button and the message is sent to your "Draft" folder. To edit the draft message, refer to Edit Draft in the Drafts Section.

8. How do I create a folder to store messages?

   You can add a personal archive folder by selecting the "New" button. Type in the folder name, use the drop down arrow to select a parent folder (if desired), and click on the "Submit" button. For more instructions, refer to New Folder section.

9. What do I do if I want to save a message?

   Messages within the "Inbox", "Sent" or any personal folder can be moved to other folders. Refer to Move section for details.

10. If I select the "Search" button will the search include all messages or just those in my "Inbox"?

    When you click on the "Search" button, the search message screen is displayed. There is an option to select the mail folder you want to search for messages. Refer to Section 4 - Search.

# Section 14 – Suggestion Box

The core tool, Suggestion Box, provides a means for users to send feedback or submit questions to The Support Center and Technical Team. The selections for feedback include:

- Comment
- Suggestion
- Question
- Improvement
- Complaint
- New Tool Request
- Other

To access this tool, click on the “Suggestion Box” link listed under Admin Tools.

## Submit Feedback

1. Select the type of feedback to be submitted (see Figure 1.0).
2. For “Other”, click on the checkbox and enter the feedback in the provided text box.
3. To be contacted by the Support Center or Technical Team, click on the desired checkbox under “Contact Options,” that is email, phone, either one, or no contact at all.
4. To clear the form of the selections, click on the “Reset Form” button.
5. Select the “Cancel” button to return to the portal Home Page.
6. To proceed to the “Suggestion Box” screen, click on the “Next Step” button.

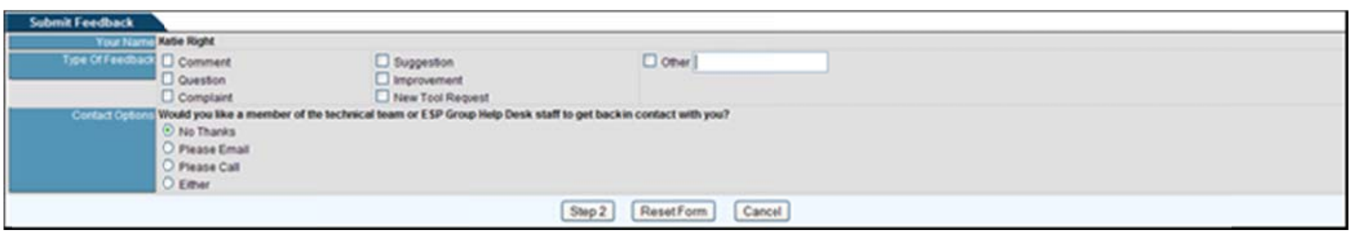



**Figure 1.0 - Feedback Center**

7. The feedback selections determine what feedback boxes are displayed (see Figure 1.1).
8. Enter in the comment, suggestion, question, compliant, etc. in the appropriate text box.
9. If desired, answer the questions regarding the effects on other users, communities, or features, best approach for fixing the problem, benefits to users, etc.
10. Once the “Feedback Box” is completed, click on the “Final Step” button to continue.
11. To return to the previous step, select the “Back to Step 1” button.
12. The “Cancel” button cancels the entered information and proceeds to the portal “Home Page.”


**Figure 1.1 - Feedback Box**

## Verify Feedback

1. The user's name, IP address, and inquiry are displayed for review (see Figure 1.2).
2. Verify the information before selecting the "Submit Feedback" button.
3. If changes are needed, select the "Back to Step 1" or "Back to Step 2" button and make the corrections or type in the new information.
4. To finalize the feedback inquiry, click on the "Submit Feedback" button.


**Figure 1.2 - Submit Feedback**

5. Once the feedback has been submitted, a confirmation screen is displayed (see Figure 1.3).
6. The inquiry has been submitted to the Support Center, and if a contact option was selected, a response will be received within 24 business hours.
7. Click on the "Return to Main Page" to return to the portal "Home Page."

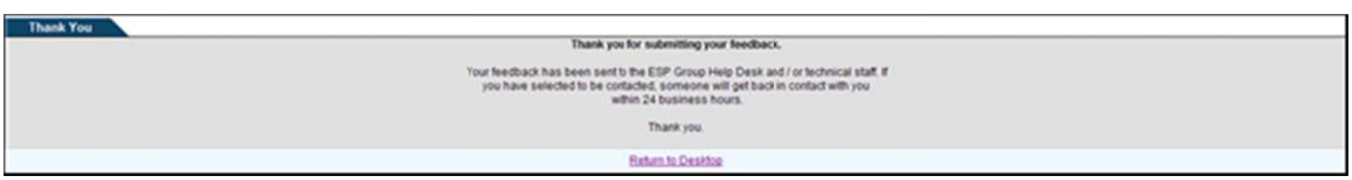



**Figure 1.3 - Confirmation**

# Frequently Asked Questions (FAQs)

1. What is the purpose of the Suggestion Box under Admin Tools?

   This tool allows you to provide feedback to The Support Center and Technical Team. You can provide comments, suggestions, ask questions, and send complaints or other feedback about the portal.

2. Who can submit feedback?

   Any user can submit feedback.

3. How long does it take for someone from Support Center to contact me?

   If you have selected a contact option, the Support Center will contact you within 24 business hours.

4. Will I always be contacted by the Support Center?

   Yes. The contact options are identified in the “Feedback Center” screen. You can be contacted via email, phone, both or not at all. Refer to Section 2 - Submit Feedback.

5. How do I know my feedback was received?

   You will receive a confirmation screen that your feedback was submitted to the Support Center.

# Section 15 – Survey Wizard

This tool allows users to easily create Questionnaires and send them out to other portal members. After the Questionnaire is posted, users can respond and results are compiled in Microsoft Excel or CSV (comma separated value) format. The Survey Wizard is located under Collaboration Tools (see Figure 1.0).

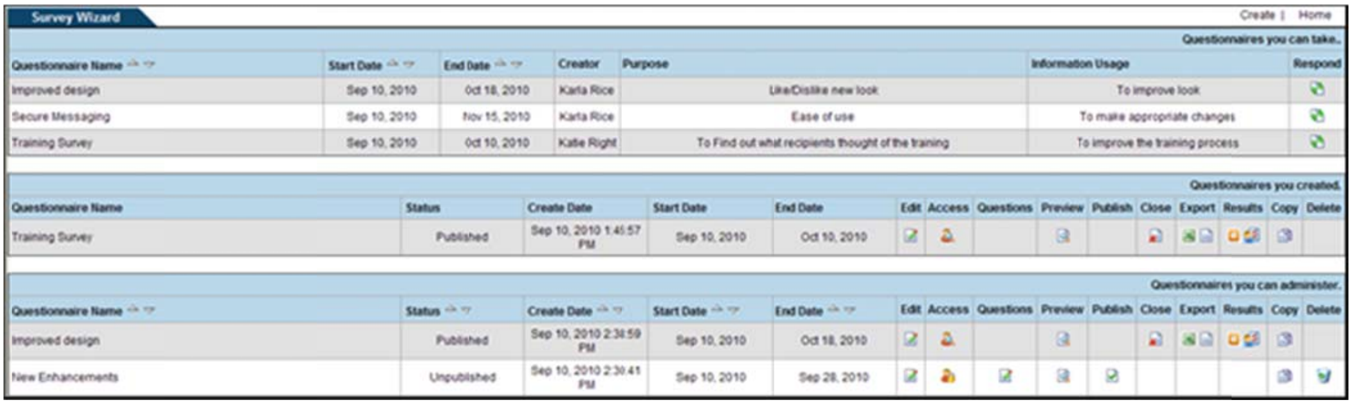



**Figure 1.0 – Survey Wizard Main**

## Create Questionnaire

As shown in Figure 1.0, the "Questionnaire" screen illustrates the ability to select an existing Questionnaire or to create one. The main menu ("Home") is displayed with various links for editing, copying, selecting participants, publishing, downloading results, etc.

1. Click on the "Create" button (see Figure 1.0).
2. Type in the "Questionnaire Name" (see Figure 1.1).
3. Type in the "Objective" of the Questionnaire as well as an explanation for "How the Information Will Be Used" within the text boxes provided.
4. Click on the appropriate check box for how the results will be used (shared with participants, research, publication/presentation, release, or other).
5. Use the drop down arrow to select the Questionnaire start and end dates.
6. Click on the "Save New Questionnaire" button to save the Questionnaire and proceed to the "Main Menu."
7. Click on the "Continue" button to save the Questionnaire and proceed to the manage user access page.
8. Click on the "Cancel" button to cancel the entered information and return to the "Questionnaire Wizard" screen.

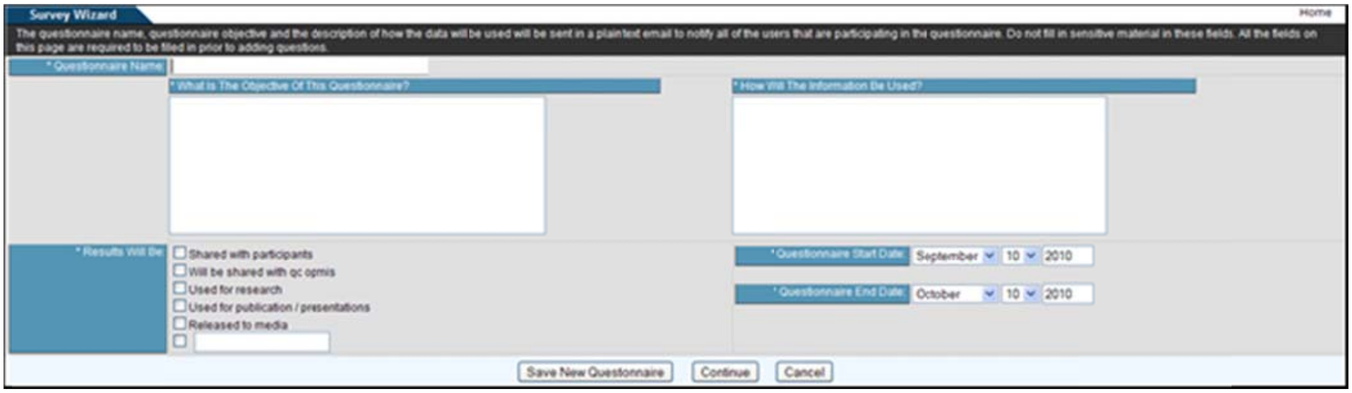



**Figure 1.1 – Create Questionnaire – Page 1**

## Manage User Access

1. Once the Questionnaire name, purpose, dates, etc. have been created you may "Continue" to the page to manage user access to the Questionnaire (see Figure 1.2). If you returned to the main page and want to manage access, click on "Access" icon and you will be able to give users access to your Questionnaire (see Figure 1.0).
2. Select the "Orgs," "Users," and/or "My Groups" 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.
5. Click on the "Search" button.
6. Highlight the user name(s) and click on the ">" button to grant users access.
7. Select the "<" button to move a user back to the "Available Users" list.
8. Notice the "User" radio box is pre-selected to allow users to view and take the Questionnaire. This is the default access right for a new Questionnaire. Click on the "Admin" radio box before moving the available user over to make the user an "Admin" over the Questionnaire.
9. Click on the "Done" button and return to the "Main Menu" screen.
10. Click on the "Continue" button to go to the page to manage questions.

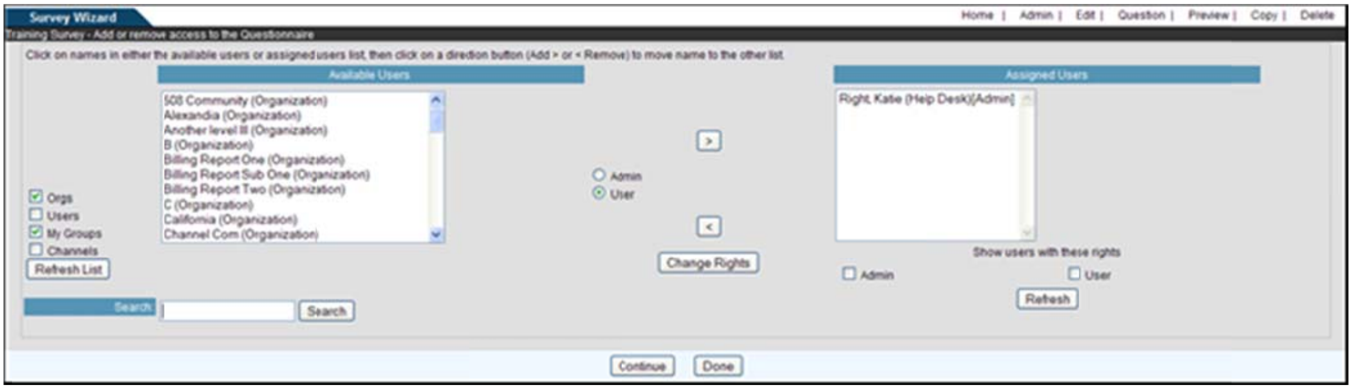



**Figure 1.2 – Create New Questionnaire - Page 2**

*Organizations, groups and users who share common compartments will be listed in the "Available Users" field. Select multiple names in a row by holding the shift key and highlighting the names, and then clicking on the ">" button. To select more than one user, organization or group 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 "Assigned Users" field.*

# Add/Edit Questionnaire Questions

## Add Questions

1. Type in the question in the "Text For Questions Or Notes" text box (see Figure 1.3).
2. Select the "Yes" radio box next to the question that states "Is user required to answer the question?" if the user is required to answer the question before submitting their Questionnaire. If the question is not required, click on the "No" radio box.
3. Click on the appropriate radio box for the question type (see TIP below). This determines how users will answer the question (i.e., yes/no, check box options, scale 1-5, etc.).
4. Type in the answer selections in the numerical text boxes for check box and radio box questions only.
5. Click on the "Save Question" button to save the question entries. The "Question List" screen displays each question saved.
6. Repeat the above steps until all the questions have been entered.
7. Select the "Cancel" button to cancel the additions or changes

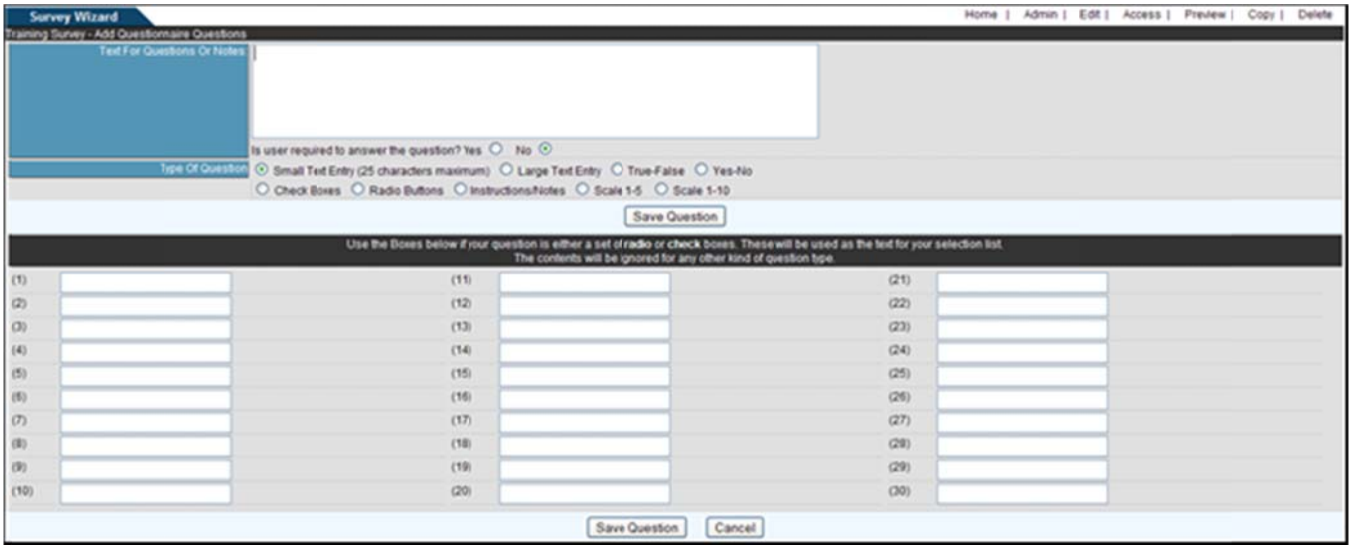



**Figure 1.3 -** Create New Questionnaire - Page 3

> *The "Small Text Entry" and "Large Text Entry" questions are open-ended and allow the user to respond by typing in their answer. "True-False" or "Yes-No" questions are closed-type questions. The user responds to these questions by selecting the appropriate radio box. Questions that provide a choice are "Check Boxes" and "Radio Boxes." The user selects the answer based on the options provided. "Scale 1-5" or "Scale 1-10" are questions that provide a rating (e.g., rate efficiency). To provide instructions or notes about the Questionnaire, select the "Instructions/Notes" radio box.*

As shown in Figure 1.4, each question is displayed by question type and possible answers. Questions that the user is required to answer have a "(Required)" label next to the question number. To arrange the questions in proper order, select the icon to move the question up, or click on the icon to move the question down. Make sure instructions or notes are positioned in the correct order to make sense to the user.

## Edit Questions

1. Click on the icon (see Figure 1.4).
2. Make the appropriate changes.
3. Click on the "Save Question" button. The "Question List" now shows the changes.
4. Click on the icon to delete a question.
5. After entering the questions, click on the "Preview" button to view how the Questionnaire will display for user
6. Click on the "Home" button to go back to main menu.

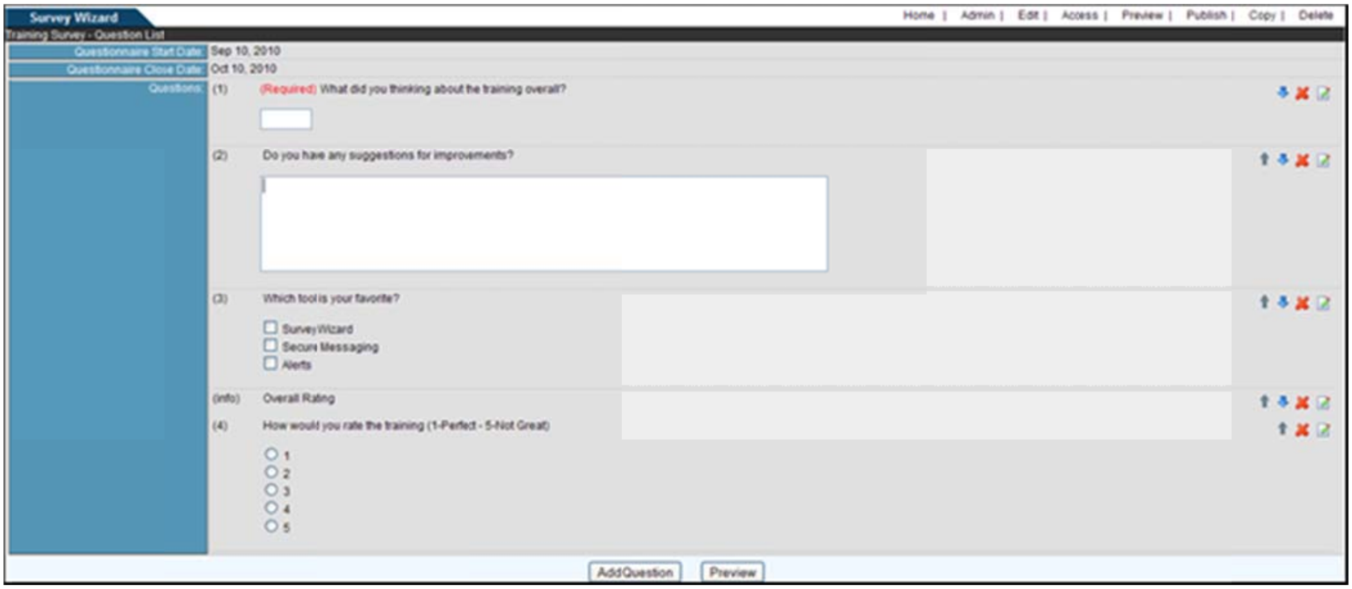



Figure 1.4 - Question Display

## Edit Questionnaire Name, Purpose, Date

1. Click on the "Edit" link from the "Home" screen or on click the icon (see Figure 1.0).
2. Modify the necessary fields (see Figure 15).
3. Click on the "Save Changes" button.
4. To add a question, select the "Add Questions" button or click on the "Cancel" button to cancel the changes.


Figure 1.5 - Edit Questionnaire

## Preview the Questionnaire

1. To actually view the Questionnaire that users will receive, click on the "Preview" button (see Figure 1.0).
2. Since the Questionnaire cannot be modified after publication, it is important to preview the Questionnaire to verify question type, position, and spelling are correct (see Figure 1.6).

3. Click on the “Publish” button to publish the Questionnaire (see Figure 1.6).


**Figure 1.6 - Preview Questionnaire**

## Publish Questionnaire

1. When the Questionnaire questions have been finalized and users are assigned access, publish the Questionnaire by clicking on the “Publish” link from the “Preview” screen (see Figure 1.6) or click “Publish” from the main menu.
2. Click on the “Publish Questionnaire” link to publish the Questionnaire (see Figure 1.7). By default, the “Send external email to participants’ box is checked which will send an email notification to users, outside of the portal, requesting their participation in the Questionnaire. If you do not want external notifications to be sent, uncheck this box.

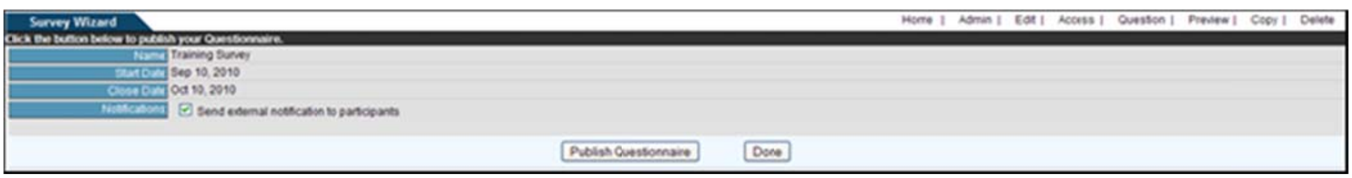



**Figure 1.7 - Publish Questionnaire**

3. Wait until the screen is displayed with the status “The questionnaire has been published” (see Figure 1.8). Do not touch the screen while the system is processing the Questionnaire. The publication may take several minutes depending on the size of the Questionnaire and the number of recipients.
4. Once Questionnaire has been published, click on the “Done” button to return to the main menu (see Figure 1.8).

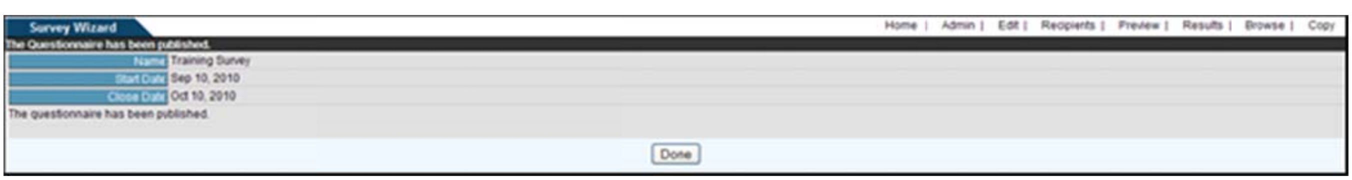



**Figure 1.8 - Questionnaire Progress**

5. After the Questionnaire is published, the “Questionnaire” screen shows “Published” under the status column (see Figure 1.9). At the top of the screen, “Questionnaires you can take” are listed. This screen also offers the option to change, preview, copy, download responses, or close the Questionnaire.

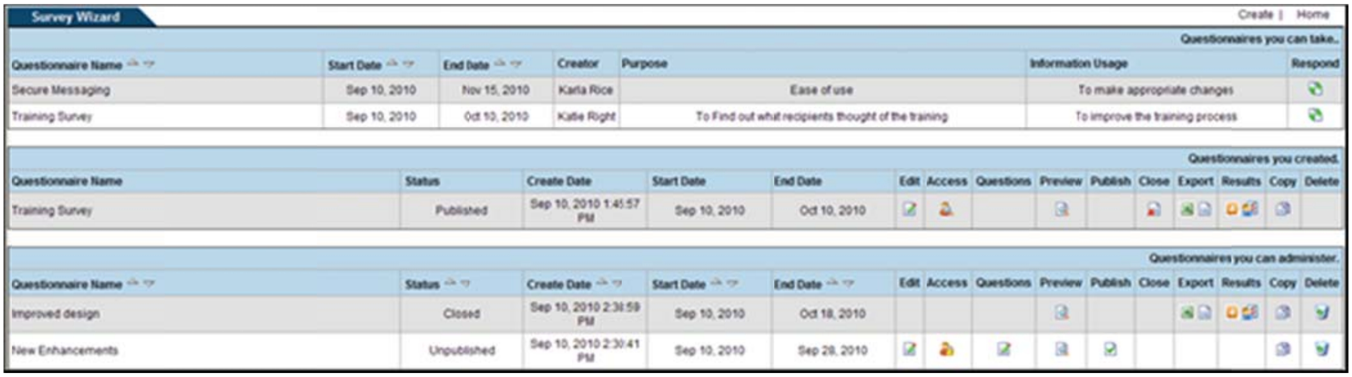



**Figure 1.9 - Questionnaire Updated**

6. Once published, Questionnaire participants will receive an external email notification if it was selected (see Figure 1.7) and a secure message within the portal that they have been invited to participate in a Questionnaire (see Figure 1.10).


**Figure 1.10 - Portal Secure Message Notification**

Note: Once the Questionnaire is published, users cannot be added or deleted. If the user list requires changes, the Questionnaire would have to be copied and then through the main menu screen, select the “Access” link to re-add participants. For more instructions, proceed to

Copy Questionnaire.

## Delete Questionnaire

1. If a Questionnaire is no longer needed or useful, it can be deleted from the “Main Menu” screen by clicking on the  icon.

2. A confirmation screen is displayed (see Figure 1.11).
3. Continue with the deletion by clicking on the "Delete" button. To cancel, click on the "Cancel" button.


**Figure 1.11 - Confirmation Screen**

## Copy Questionnaire

A published or unpublished Questionnaire can be copied for editing and republishing at a later date.

1. Click on the  from the main menu screen.
2. Make the necessary modifications to the Questionnaire name, objective, usage, and date
3. Click on the "Save New Copy" button to save the new copy and return to the main menu (see Figure 1.12).
4. Click "Continue" to give users access, add questions and publish the Questionnaire.
5. To cancel, click on the "Cancel" button.

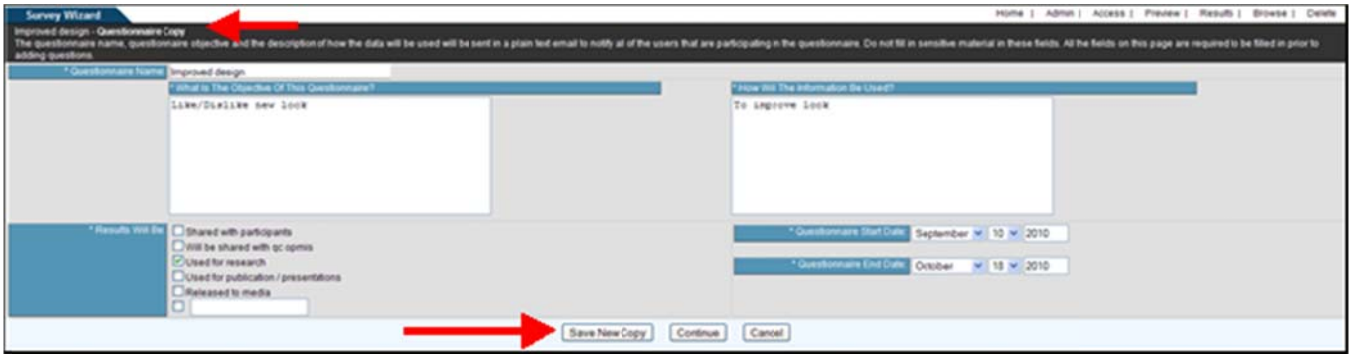



**Figure 1.12 - Copy Questionnaire**

## Respond to Questionnaire

Once the Questionnaire is published, participants will receive a secure message and external email notification describing the purpose of the Questionnaire.

1. From the main menu, participants can respond to the Questionnaire by clicking on the  icon (see Figure 1.13).


Figure 1.13 - Respond to Questionnaire

2. Answer the questions on the Questionnaire. Questions marked with "(Required)" must be answered in order to submit the Questionnaire. If required questions are not answered, an error message is displayed: "Missing Required Question."
3. Click the "Save" button to save and return later to submit the Questionnaire (see Figure 1.14).
4. After answering the questions, click on the "Submit" button at the bottom of the screen.
5. If there were mistakes or a need to change the answers, click on the "Cancel" button to return to the main menu.
6. Once the Questionnaire is completed and submitted, a message is displayed at the "Questionnaire" screen that the Questionnaire was answered successfully. The Questionnaire is no longer displayed in the "Questionnaires you can take" field.

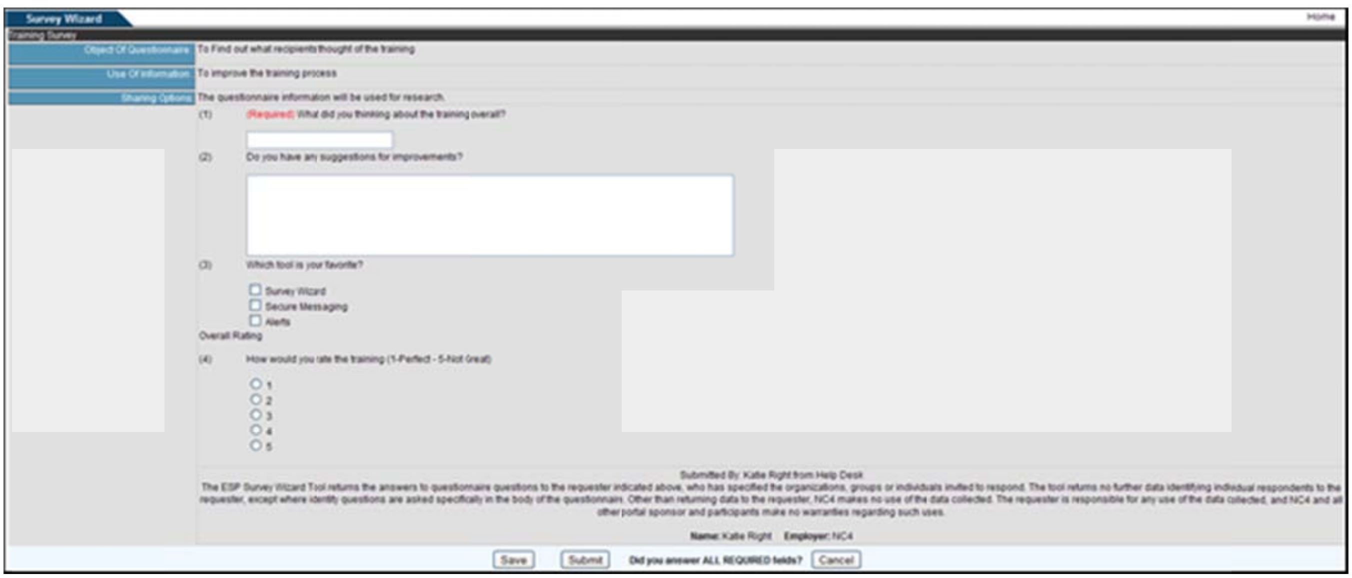



Figure 1.14 – Questionnaire

## Exporting Responses

After the Questionnaire has been published, responses can be downloaded in Microsoft Excel (XSL) format or Comma Separate Value (CSV) file format.

1. Click on the appropriate or icon in the "Export" column to view the responses to the Questionnaire (see Figure 1.15).

2. At the prompt, select the open or save option. To save the file, find the location and double-click on the file name to open it. In Microsoft Excel, the questions are listed at the top followed by the responses in successive rows. Resize the rows to easily read the information.

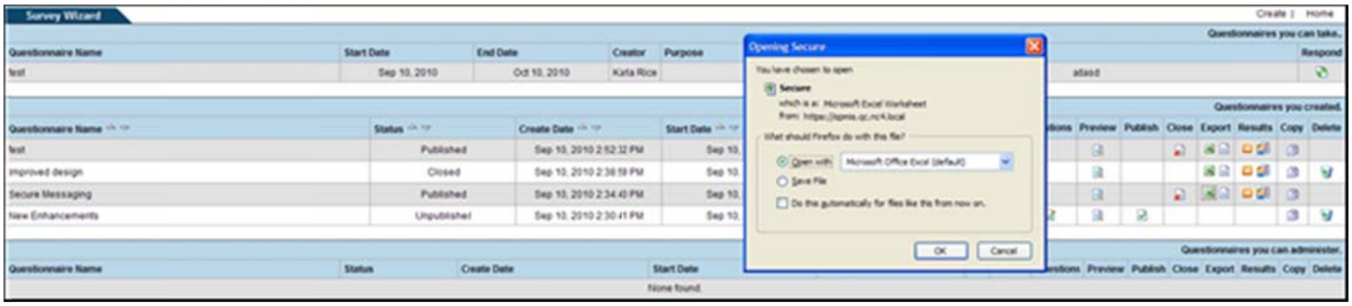


**Figure 1.15 - Download Answers**

## View the Results

Once a Questionnaire has been published, responses can also be viewed in graphs or can be browsed through individually.

1. Click on the icon in the “Results” column to view the responses to the Questionnaire in a graph format (see Figure 1.16).

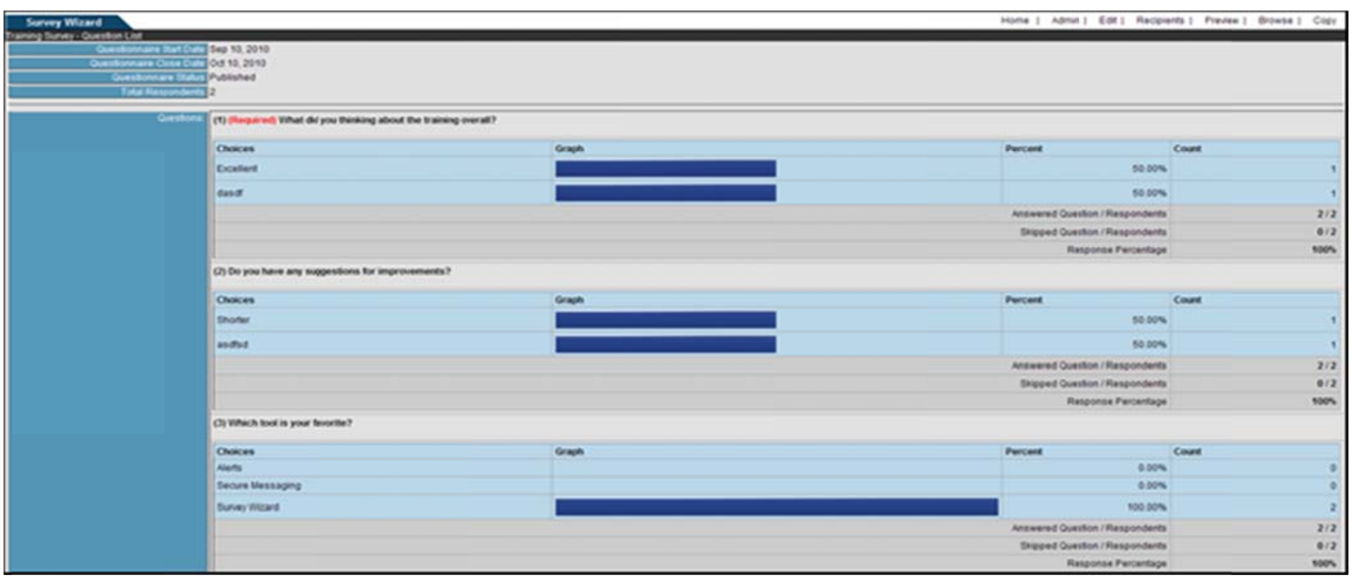


**Figure 1.16 – View Results - Graph**

2. Click on the icon in the “Results” column to browse through the responses to the Questionnaire individually (see Figure 1.17).

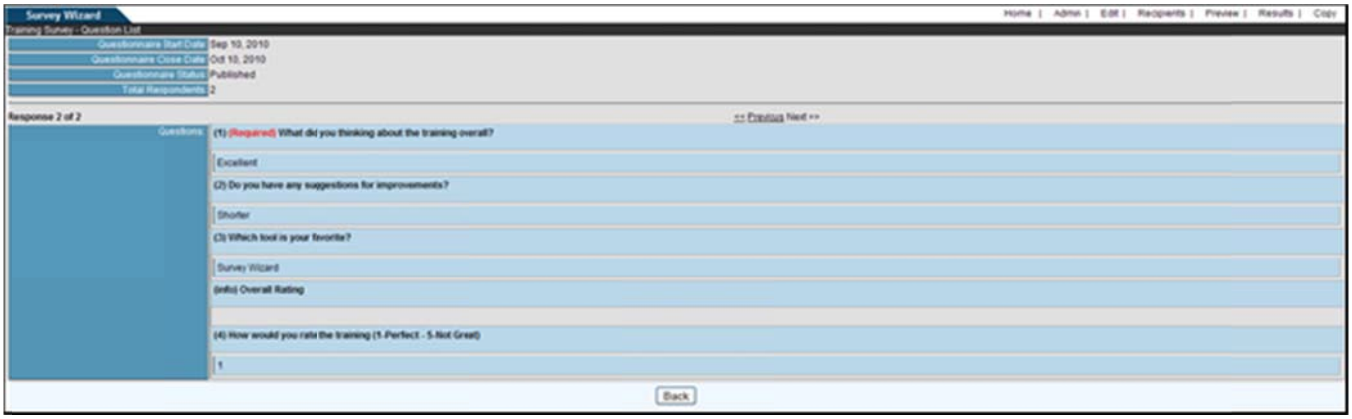



Figure 1.17 – Browse Results

## Close the Questionnaire

A Questionnaire can be closed at any time after publication and before the designated end date.  Closing the Questionnaire prevents any more participants from responding.

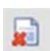
1. Click on the  icon under the “Close” Column
2. Once the Questionnaire is closed, the survey may only be previewed, answers exported, copied or deleted.
3. A confirmation message that the Questionnaire was closed will appear once clicking the  icon (see Figure 1.18).


Figure 1.18 – Close Questionnaire

# Frequently Asked Questions (FAQs)

1. How do I know when I'm asked to participate in a Questionnaire?

   You will receive internal and external email notifications.

2. How do I participate in a Questionnaire?

   From the portal, select the "Survey Wizard" link under "Workstation" tab. Questionnaires for which you are asked to participate appear at the top of the page.

3. How do I create a Questionnaire?

   At the "Questionnaire" main menu, there is an option to create a questionnaire or select a Questionnaire. Click on the "Create" link and follow the instructions in Create Questionnaire section of the User Guide.

4. Once I created the Questionnaire, how do I assign participants?

   The Questionnaire administrator can create a group of users to receive the Questionnaire. From the main menu, click the "Access" link. For detailed steps, refer to Manage User Access section of the User Guide.

5. How do I add questions and edit the Questionnaire if needed?

   There are two ways of adding questions. From the main menu, select the "Questions" link. Refer to the Add/Edit Questions section of the User Guide. To edit the Questionnaire, click on the icon under the "Edit Column or click "Edit" link. Refer to Edit Questionnaire name, Purpose, Date section of the User Guide for detailed instructions.

6. What do I need to select to publish a Questionnaire?

   At the main menu, select the icon under the "Publish" column or click the "Publish" link and then click on the "Publish Questionnaire" link. For detail instructions, refer to Publish Questionnaire section of the User Guide.

7. How do I edit the end date to provide more time for Questionnaire responses?

   At the main menu, select the icon, specify the new end date and click on the "Save Changes" button. Refer to the Edit Questionnaire section of the User Guide.

8. How do I download the responses?

   Once the Questionnaire is published, click on the appropriate icon under the "Export" Column. Refer to the Exporting Responses section of the User Guide.

9. Can I view the results without downloading the responses?

   Yes, once published the administrator/s over the Questionnaire may click on the icon or icon under the "Results" column to view the responses in graphs or to browse through the results individually. Refer to the View the Results section of the User Guide.

10. Is there a way to view who has or has not responded to my Questionnaire?

    Yes, once published the administrator/s over the Questionnaire may click on the icon under the "Access" column to view all non-responders.

11. I need to close the Questionnaire, what steps do I take?

From the main menu, click the icon under the “Close” column. Once the Questionnaire is closed, no more responses can be included. Refer to the Close the Questionnaire section of the User Guide.

# Section 16 – TaskTrac

TaskTrac is the core tool that allows users to create and manage tasks, view and search for specific tasks, and generate various reports. The originator of the task assigns access rights for each user or organization. Within this tool, there are four user access rights:

- Admin - automatically assigned to the task originator for managing access and tasks, creating tasks and subtasks, adding comments, editing and deleting tasks
- Lead - user assigned as a Project Lead to the task. The "Lead" can perform the same functions as the "Admin" including managing user access.
- Resource - user right is assigned to those users who are resources for the task (e.g., System Operations, Marketing). Users assigned as resources can perform the same functions as Admin and Lead; however, they can only view user access.
- View - access right allows assigned users to only view the task and add comments.

Users with Admin, Lead, or Resource rights have the ability to perform task management functions. Task management includes adding task details, editing and deleting tasks, adding subtasks, and copying and moving tasks. Any user can add comments and view and search for tasks. To manage a task, refer to the Task Details section of this user guide.

## TaskTrac Main

To access this tool, select the "TaskTrac" link from the Home Page, under the Collaboration Tools menu or from the navigation bar.

As shown in Figure 1.0, the main TaskTrac screen illustrates the ability to generate and view tasks and reports. The tasks that a user has been granted access to are listed on the left side of the screen under "Tasks." This left side can be collapsed if JavaScript has been enabled on your browser by clicking on the dark area on separator line. On the right side of the screen under "My Assignments," overdue and current tasks are listed by name, division, status, priority, percentage of completion, and due date. To view a task, click on the task name or do an advanced search. If no tasks are shown, create a new task by completing the steps in Section 3 of this user guide.

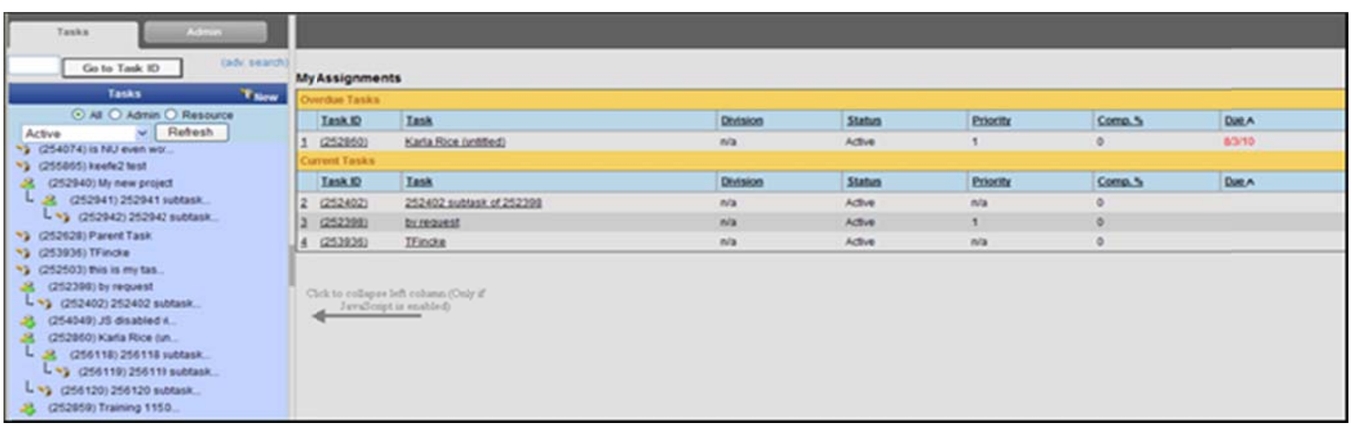



**Figure 1.0 - TaskTrac Main**

# Tasks

## Task ID Search

To search by the task ID, enter in the task ID number in the field and click on the "Go To Task ID" button (see Figure 1.0). The task details for that particular task will display on the right side of the screen.

## Adv. Search

To perform an advanced search for specific tasks:

1. Click on the "(adv search)" link next to the "Go to task id" button (see Figure 1.0).
2. The "Report Parameters" screen is displayed (see Figure 1.1).
3. Enter the task name in the "Name Search" field.
4. Use the scroll bar to select a resource in the "Assigned" field, a user access right in the "Access" field, a priority, task status, division, and funding source in the appropriate fields.
5. Use the drop down arrows to select due date range to facilitate the search.
6. Click on the "Submit Report" button once the information is selected.

Note: Not all fields are required.

After selecting the "Submit Report" button, a "Custom Task Report" screen displays the tasks by name, division, status, priority, percentage of completion, and the due date.


**Figure 1.1 – Search Report Parameters**

## New Task

Any user can create new tasks and assign access to organizations or users within their compartment. Only Portal System Administrators can assign users outside compartments. To create a task, click on the "New" link (see Figure 1.0).

### Manage Access

In the manage access area/tab (see Figure 1.1), assign access to organizations, users, and/or channels (my groups excluded) for the task by performing the following steps:

1. Type in the name of the task in the “Name of Task” field (see Figure 1.2).
2. Select the “Admin” radio box to act as the Administrator for the task, or click on the “Lead” radio box for the Project Lead role.
3. Select the “Orgs,” “Users,” and/or “Channels” check boxes.
4. Click on the “Refresh List” 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.
5. Type in the name of a user, group, or channel 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.
6. Click on the “Search” button.
7. Highlight the names from the “Available Users” field, click on a user right (i.e., Admin, Lead, Resource, or View), and select the “Add” button > to move the users under the “Assigned Users” field.
8. Click on the “Remove” button < to remove a user back to the “Available Users” field.
9. Notify users via email by selecting the “notify users?” checkbox.
10. Check off “include subs?” if you would like the individuals granted access to automatically have access to any sub tasks that are created.
11. Click on the “Finished” button to update the task.
12. Select the “Update” button to update the task and remain on the same screen.
13. Select the “Cancel” button to cancel the task.

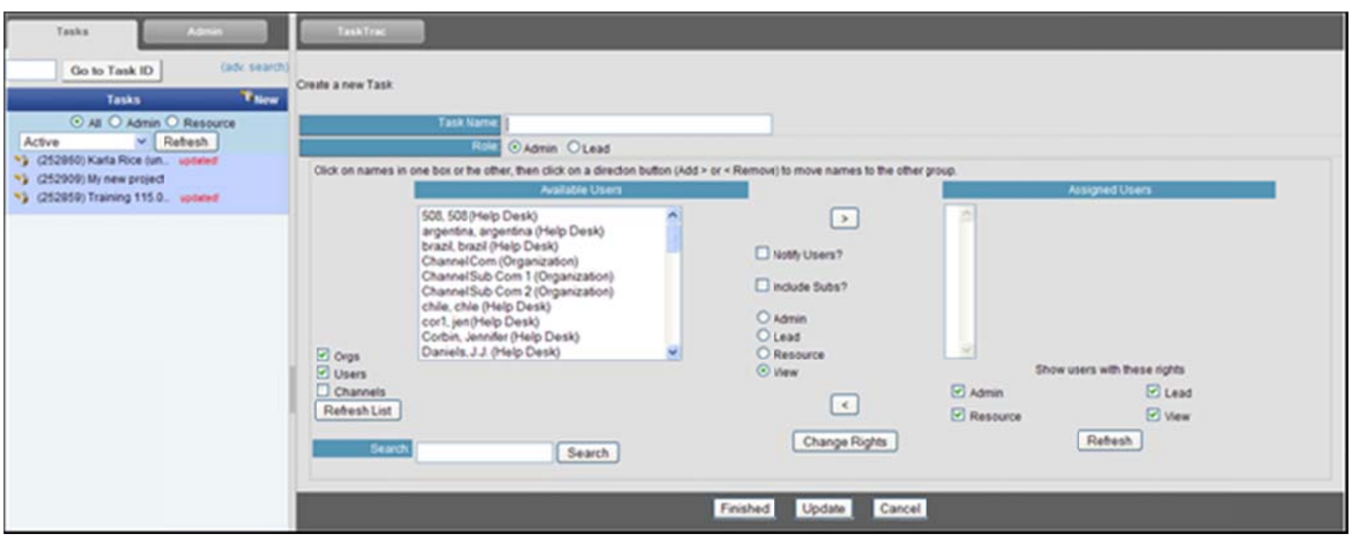


**Figure 1.2 - Manage Access**

*Organizations and users who share common compartments will be listed in the “Available Users” field. To select multiple names in a row, hold the shift key and highlight the names, select the appropriate access 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 “Assigned Users” field.*

### Change User Rights

1. On the “Manage Access” screen, select the right (see Figure 1.3).
2. Highlight the user’s name in the “Assigned Users” field.
3. Click on the “Change Rights” button.
4. To view users with a particular right (e.g., Resource), select the appropriate user right checkbox under “Show Users With These Rights” and click on the “Refresh” button. The “Assigned Users” field is updated.
5. Click on the “Finished” button to update the task.
6. Select the “Update” button to update the task and remain on the same screen.
7. Select the “Delete” button to delete the task. A confirmation screen is displayed. Continue by clicking on the “Delete” button to permanently delete the task.

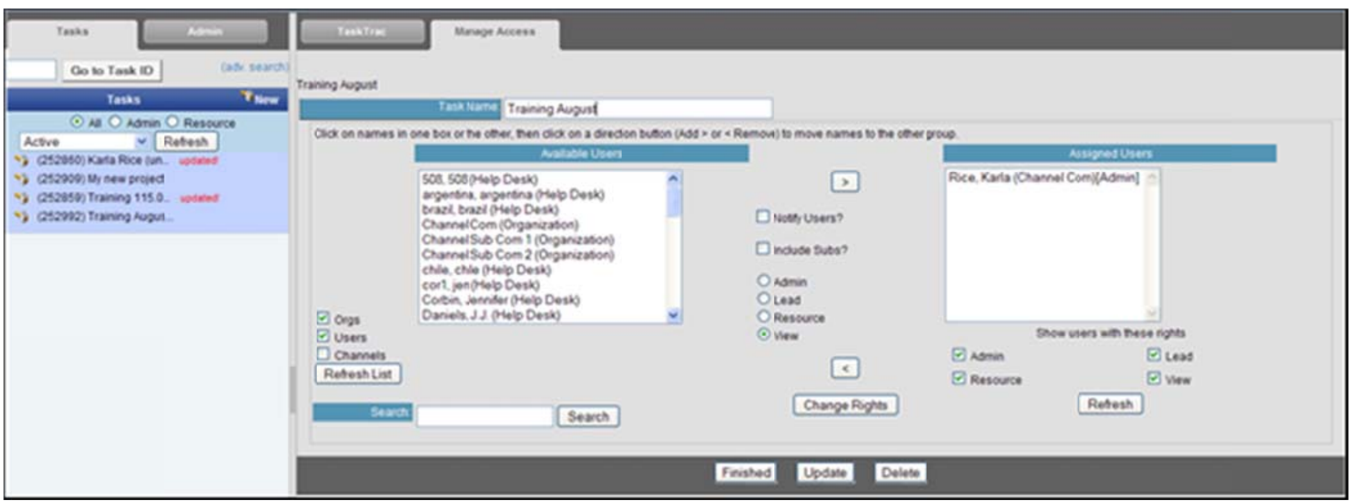



**Figure 1.3 – Change Access**

## Task Details

The task details area will allow you to enter the specific information on the task. This area will allow you to view a Gantt view of the task, edit the task information itself, add new subtasks, add comments, copy and/or move the task and delete the task.

## Gantt View

This tool is used to view the task in a schedule format.

1. Click on the “Gantt View” button from the task details screen.
2. The task name is displayed with a color legend illustrating a timeframe for the task based on completed and active, scheduled and deadline dates (see Figure 1.4).
3. To view the task in weeks or months, click on the “Display in Weeks” or “Display in Months” link.
4. To advance a week or month, click on the appropriate link to the right. To move back, click on the link to the left. The screen is automatically updated with scheduled dates.
5. Click the “Back to Task Details” link at the top right to return to the “Task Details” screen.

*Under “View Options” on the left side of any task screen, the user can select options simultaneously. For example, the user clicks on the “Resource” radio box, uses the drop down arrow to select the status “Completed,” and clicks on the “Refresh” button. The “Task List” now displays tasks that are completed when the user has been assigned as a resource.*

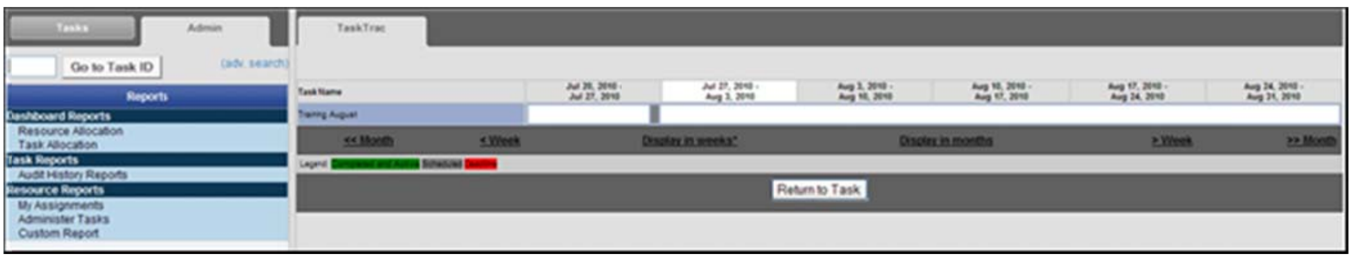



**Figure 1.4 - Gantt View**

## Edit Task

Once users are assigned access and the “Finished” button is selected, the task details screen is displayed (see Figure 1.5).

1. Use the drop down arrow for the “Status” field to select the appropriate activity level of the task. Options are: Active, Started-On Hold, Inactive, Completed, Canceled, OBE (Overcome by Events).
2. Use the appropriate drop down arrows to select a priority number, actual start, end, and deadline dates, and percentage of task completion.
3. Enter an estimate of the number of days for task completion in the “Est. Days” field.
4. Type an explanation for the task in the “Reason” field.
5. Type a description of the task in the “Description” field.
6. Use the drop down arrows to select a “Division” and a “Funding” source in the appropriate fields.
7. Enter the Helpdesk Ticket number, if assigned, in the “Helpdesk Ticket” field.
8. Attach any relevant files to the task by clicking on the “Browse” button, highlighting the filename, and clicking on the “Attach” button.

9. Select the checkbox at the bottom of the screen to notify Resources and Administrators of any changes.
10. Click on the "Finished" button to update the task and return to the "Task Detail" Screen.
11. Select the "Update" button if other tasks require changes.
12. Click on the "Cancel" button to cancel the edits and return to the "Task Detail" screen.

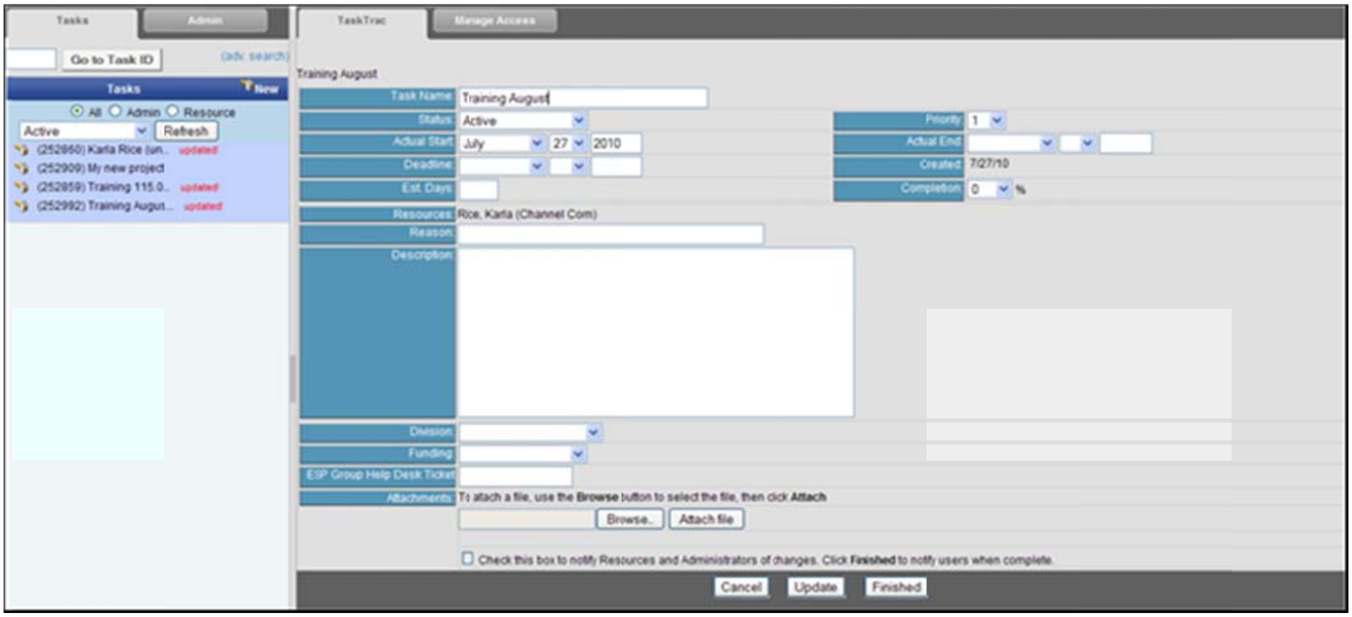


Figure 1.5 - Task Edit Screen

## Update Task Details

At the "Task Detail" screen, there are various functions that can be performed for managing the task (see Figure 1.6). To edit the task information:

1. Click on the "Edit" button and the "Task Edit" screen is displayed.
2. Make the required changes in the appropriate fields.
3. Click on the "Finished" button.
4. Once changes are made, the word, "updated," is displayed in red text next to the task name.
5. To cancel the edits, select the "Cancel" button.
6. To send an email to the task originator, click on the name in the "Created By" field.

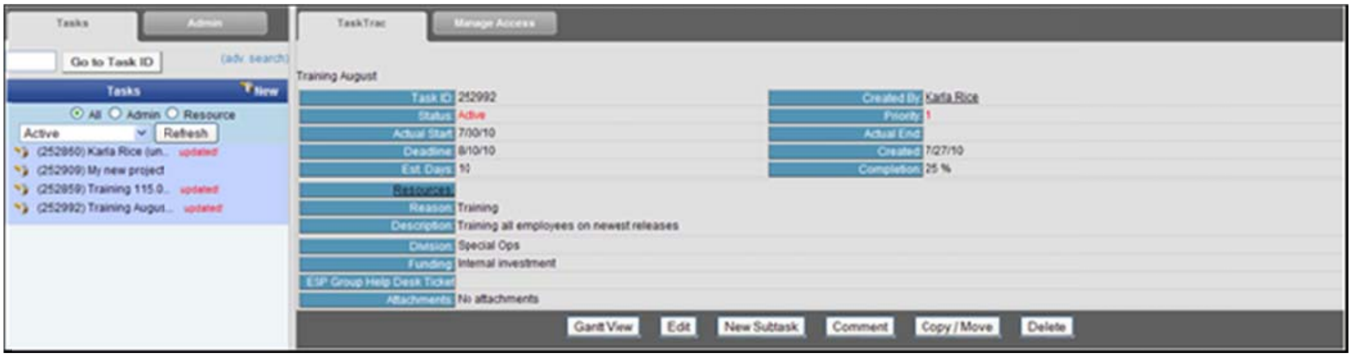



**Figure 1.6 - Task Detail Screen**

*To manage or view user access to the task, click on the access link at the top right corner of the "Task Detail" screen. Users with Admin or Lead access right can manage access by clicking on the "Manage Access" link. The "Manage Access" screen is displayed for editing. Users with Resource or View rights can view user access by clicking on the "View Access" link.*

## New Subtask

A user can create subtasks under a parent task or a subtask (see Figure 1.7).

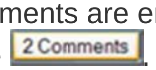
1. Click on the "New Subtask" button from the "Task Detail" screen.
2. The "Manage Access" screen is displayed to select users and access rights (see
3. Manage Access).
4. Once the user access is completed, the "Task Edit" screen is displayed for adding and editing task information (see Edit Task for specific instructions).

Figure 1.8 illustrates an example of subtasks. The left side of the "Task Detail" screen is updated with the subtask listed under the parent task. The parent task icon shows a "+" symbol is used to expand the subtasks. Click on the icon to view the list of subtasks as shown in Figure 1.7. A "-" symbol within the icon is used to compress the listing of subtasks. The number next to each task refers to the number of subtasks under the parent task. The subtasks are also listed on the right side of the screen under the "Subtasks" field. To view the details of a subtask, click on the subtask name and the "Task Details" screen for that task is displayed.


**Figure 1.7 - New Subtask**

## Comments

Any user can add comments.

1. Click on the “Comments” button of the “Task Detail” screen.
2. The “Task Comment” screen displays the Task Name, Status, Task ID, Priority, and Ticket number (if applicable) (see Figure 1.8).
3. Enter the comments into the “Comment” field.
4. Click on the “Add Comment” button.
5. If more than one comment is required, type in the comment and continue to select the “Add Comment” button.
6. Each comment is listed under the “Posted Comment” field.
7. Click on the “Finished” button after all comments are entered. The “Task Details” screen shows a number within the “Comments” button, for example .
8. Click on the “Comments” button to view the comments.
9. Select the “Cancel” button to return to the “Task Details” screen.

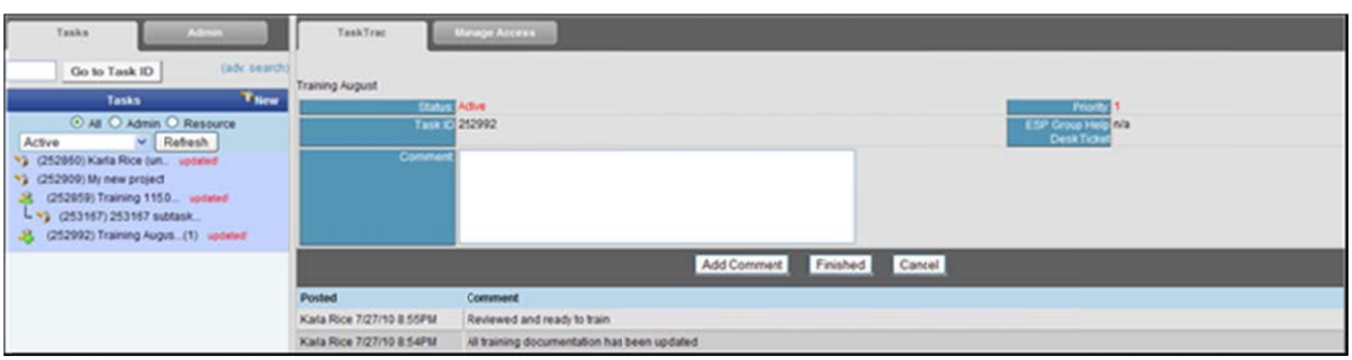



**Figure 1.8 - Task Comments**

## Copy/Move Task

1. Highlight the new task name within the “Pick a New Parent” field (see Figure 1.9).
2. Click on the “Copy” or “Move” button.
3. To include any subtasks, select the “Include Subtasks” checkbox at the bottom of the screen.
4. Once a task has been copied or moved to another parent task, the “Task Detail” screen is displayed.
5. On the left side of the screen, click on the task icon to expand the task list, and then click on it again to shrink the list.
6. The right side of the “Task Detail” screen reflects the copy or move changes under the “Subtasks” field.

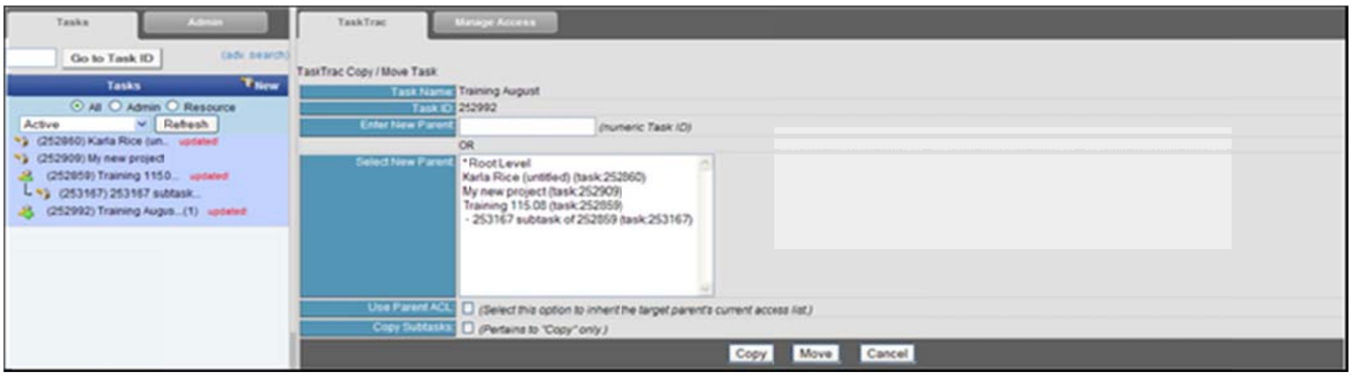



**Figure 1.9 - Task Copy/Move**

## Delete Task

Once a task is deleted, it cannot be retrieved. To delete the task:

1. Click on the “Delete” button (see Figure 1.6).
2. A screen is displayed to confirm the action (see Figure 1.10).
3. To delete, click on the “Delete” button.
4. To cancel and return to the “Task Details” screen, select the “Cancel” button.
5. Once the task is deleted, the “Task List” on the left side of the main screen no longer displays the task.

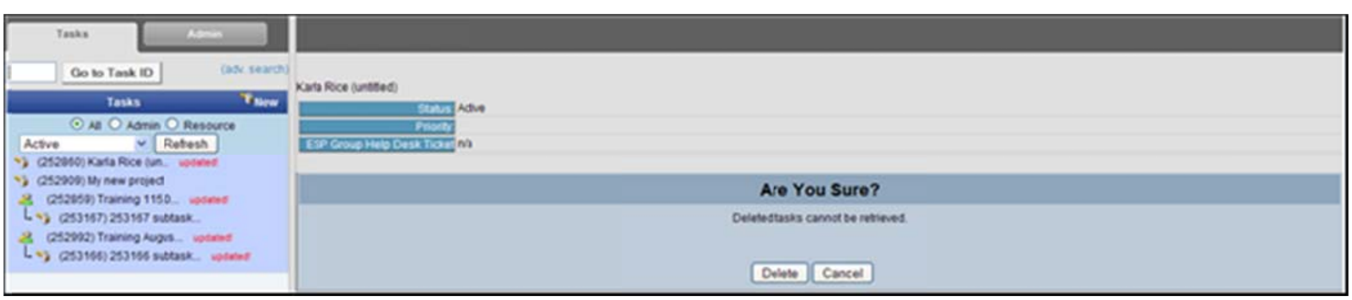



**Figure 1.10 - Delete Confirmation**

## View Options

Any user can view and search for a task. To update the Task List with view options or to view a particular task:

### Rights Search (Radio Buttons)

This tool is used to view tasks where you have specific rights (see Figure 1.11). Select the radio button that shows the appropriate right. Then click the “Refresh” button. Options are: All, Admin and Resource.

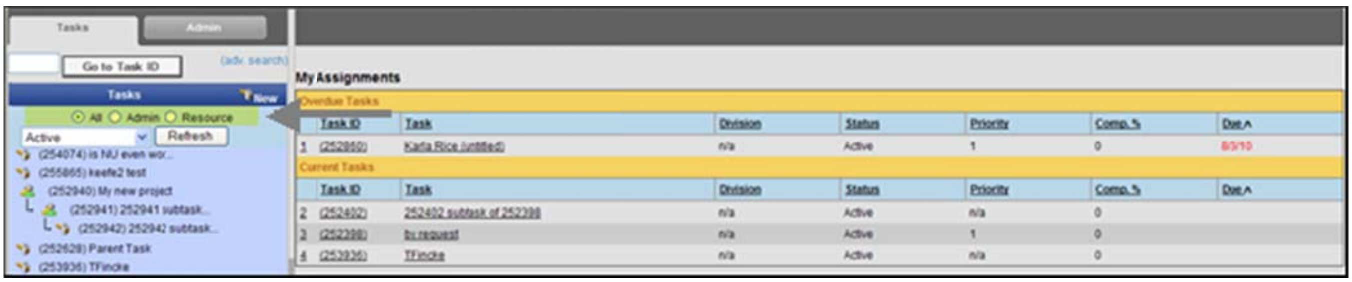



**Figure 1.11 – Search Rights**

### Status Search (Dropdown)

This tool is used to only view tasks with that specific status (see Figure 1.12). Select the status in the drop down list box. Then click the “Refresh” button. Options are: Active, Started-On Hold, Inactive, Completed, Canceled, OBE (Overcome by Events).

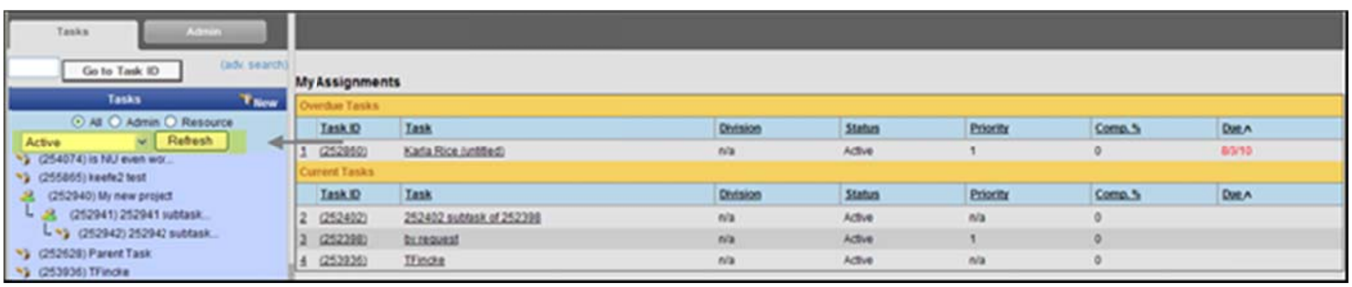



**Figure 1.12 - Search Statuses**

## Admin

“Admin” link on the left side of any task screen to generate several reports based on certain search criteria (see Figure 1.13).

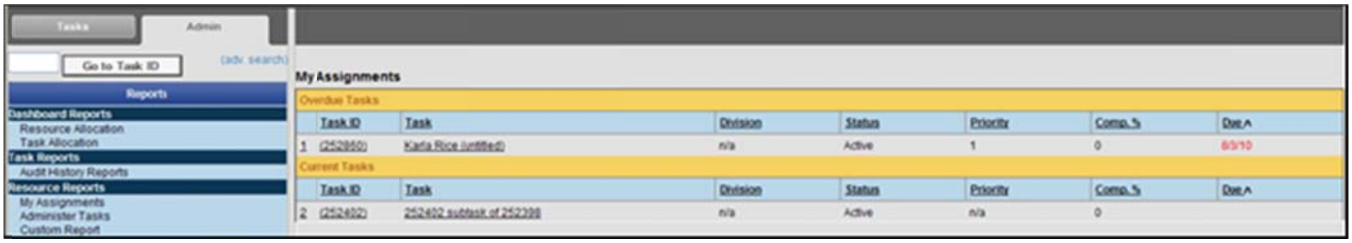



**Figure 1.13 – TaskTrac Reports**

## Dashboard Reports

### Resource Allocation

The Resource Allocation report shows each of the resources/individuals and the tasks assigned to those individuals.

1. Click on the “Admin” link.
2. Click on the “Resource Allocation” link under “Dashboard Reports” (see Figure 1.13).
3. The Resource Allocation report will show the name of each individual, tasks assigned to each individual, task id, assigned rights, and the task progress (see Figure 1.14).

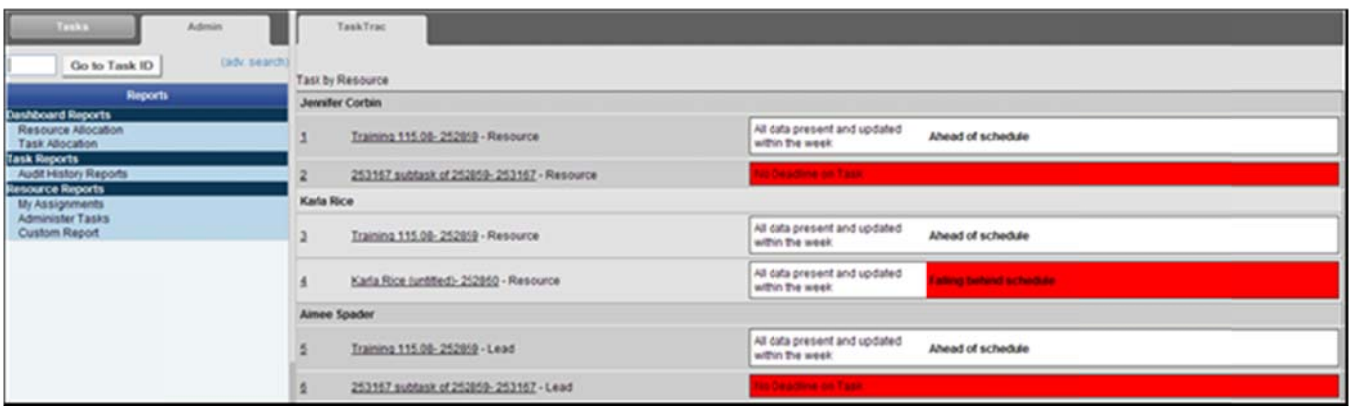



**Figure 1.14 – Resource Allocation**

### Task Allocation

The Task Allocation report shows each of the tasks and the resources/individuals assigned to that task.

1. Click on the “Admin” link.
2. Click on the “Task Allocation” link under “Dashboard Reports” (see Figure 1.13).
3. The Task Allocation report will show the name of each task, task id, each individual assigned to the task, assigned rights, and the task progress (see Figure 1.15).

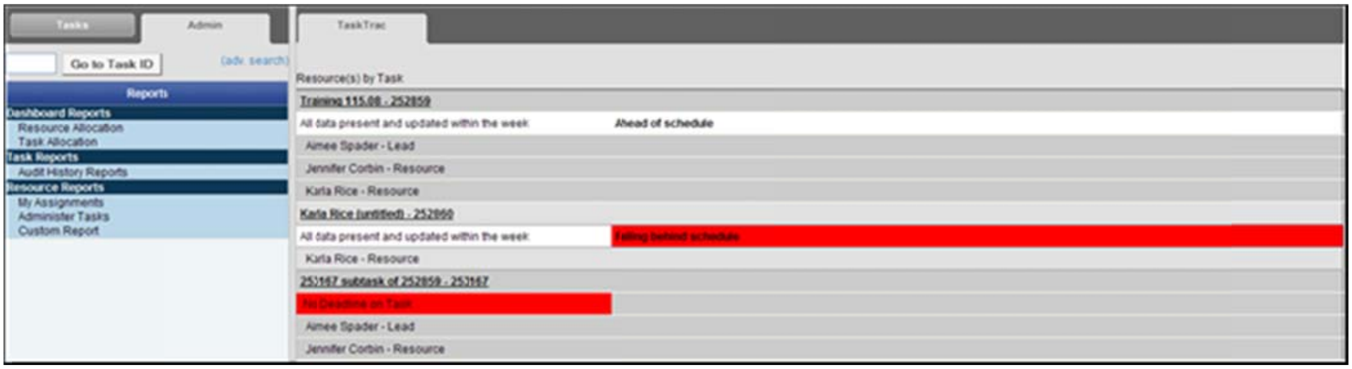



Figure 1.15 – Task Allocation

# Task Reports

## Audit History Reports

The Audit History report provides a history of a particular task.

1. Click on the “Admin” link.
2. Click on the “Audit History Report” link under “Task Reports” (see Figure 1.13).
3. Click on the task name to view the audit history report (see Figure 1.16).
4. An audit report includes the priority, status, estimated days and percentage of completion, funding source and division, deadline date, task description and reason, start and end dates, and editing information (see Figure 1.17).


Figure 1.16 – Task Reports

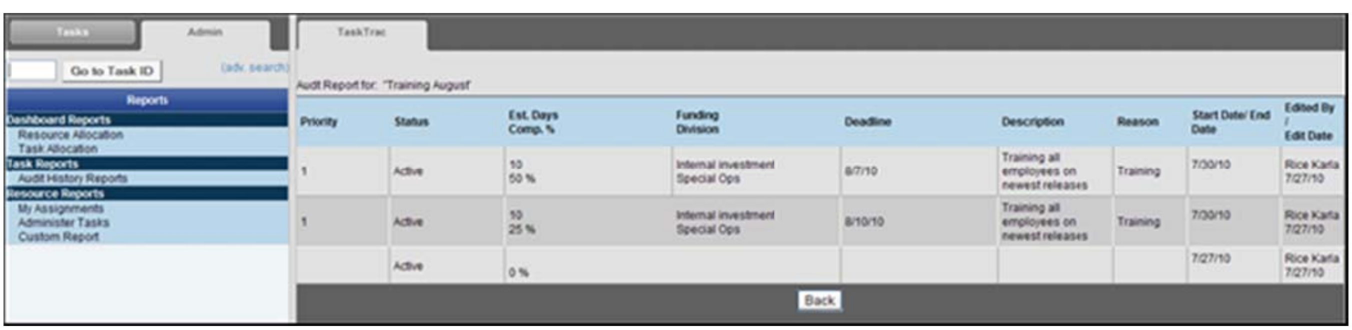



Figure 1.17 - Audit History Report

## Resource Reports

### My Assignments

The My Assignments report will list any current tasks assigned to you.

1. Click on the “Admin” link.
2. Click on the “My Assignments” link under “Resource Reports” (see Figure 1.13).
3. The report will show the current tasks assigned by name, division, status, priority, percentage of completion, and due date (see Figure 1.18).
4. Click on the “Task” name to advance to the “Task Details” screen (see Figure 1.6).

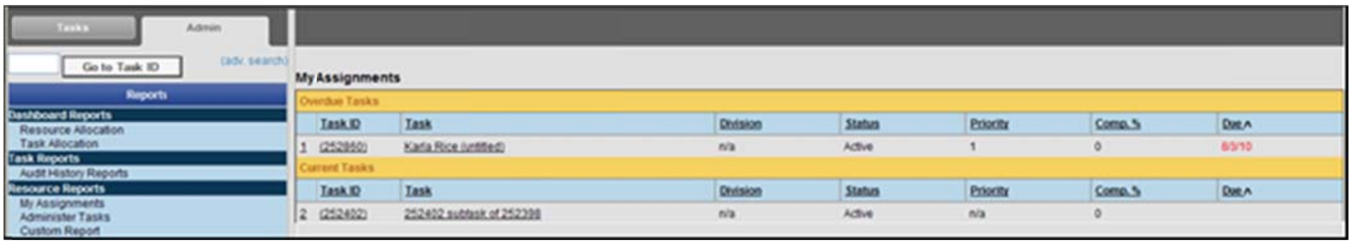



**Figure 1.18 – My Assignments**

### Administer Tasks

The Administer Tasks tool allows you to view tasks in which you have administrative rights.

1. Click on the “Admin” link.
2. Click on the “Administer Tasks” link under “Resource Reports” (see Figure 1.13).
3. The report will show the task id, task name, division, status, priority, percentage of completion, and due date (see Figure 1.19).
4. Click on the “Task” name to advance to the “Task Details” screen (see Figure 1.6).

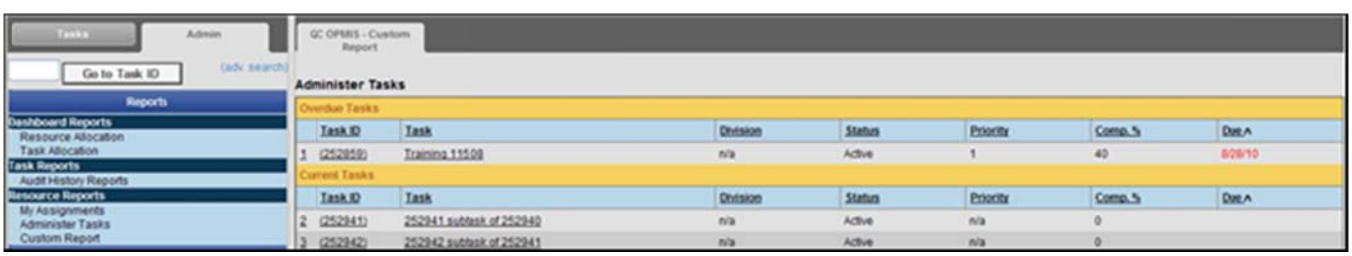



**Figure 1.19 – Administer Tasks**

### Custom Report

The Custom Report tool allows you to do an advanced search for a specific task.

1. Click on the “Admin” link.
2. Click on the “Custom Report” link under “Resource Reports” (see Figure 1.13).
3. Fill in appropriate parameters (i.e. Name, Assigned, Access, Priority, Status, Division, Funding or Due Date) (see Figure 1.20).
4. Click “Submit Report” button.
5. The report will show the task id, task name, division, status, priority, percentage of completion, and due date.
6. Click on the “Task” name to advance to the “Task Details” screen (see Figure 1.6).


**Figure 1.20 – Custom Report**

# Frequently Asked Questions (FAQs)

1. How do I create a task?

    Regardless of access rights, any user can create a task. Click on "Create a New Task" link on the left side of the main screen and refer to Create a New Task for instructions.

2. How do I change users access rights after I have selected users for access?

    Select a user access right, highlight the user's name in the "Assigned Users" field and click on the "Change Rights" button. Refer to Manage Access section for detailed instructions.

3. How do I delete a user from having access to the task?

    Within the "Manage Access" screen, highlight the user's name in the "Assigned Users" field, click on the back directional arrow (<), and the user is placed under the "Available Users" field.

4. What functions can I perform if I am granted view access right to a task?

    You can view and search for tasks, add comments, and view reports. Refer to Change User Rights section for additional information.

5. Once I have created the task and assigned users, do I need to complete all the fields for the "Task Edit" screen?

    No. The fields are for informational purposes to provide details associated with the task. To complete any of the fields, refer to Add Task Details for instructions.

6. I want to make changes to a task that I created. What do I do?

    From the "Task Detail" screen, click on the "Edit" button and make the appropriate changes. For additional information, consult

    Update Task Details.

7. If I delete a task is it permanent? Are subtasks also deleted?

    Yes. Once you delete a task it cannot be retrieved. All subtasks associated with the parent task are also permanently deleted.

8. I have created a main task or parent and now I want to add a subtask, what do I do?

    Refer to Create Subtask section of this chapter.

9. I have created a new subtask under the wrong parent. What can I do to place it under the correct parent task?

    You can copy or move the subtask under the correct parent by clicking on the "Copy/Move" button. For detailed instructions, please refer to Copy/Move .

10. How do I view comments associated with a particular task?

    Click on the task name and select the "Comments" button. If comments have been added, the "Comments" button will display a number to reflect the number of comments made to the task. Refer to Comments for additional information.

11. What is the purpose for the "Admin," "Resource" or "All" radio box at the main TaskTrac screen?

    It provides options for viewing the various tasks within your "Task List". If you select the "Resource" radio box, your "Task List" is updated to include only the tasks you are assigned to as a resource. Refer to View and Search section of this chapter for other ways to view tasks.

12. What is the “Gantt View” button?

    The “Gantt View” button provides another way of viewing the task. It includes a schedule type format with color legend displaying tasks that are completed and active, scheduled, and deadline dates. Please refer to Gantt View for additional information.

13. I need to search for a task and I cannot remember the Task ID. How can I perform a search?

    Click on the “(adv search)” link next to “View Options.” The “Report Parameters” screen is displayed. Complete screen with your search criteria and click on the “Submit Report” button. Refer to Adv. Search for additional information.

14. What kind of reports can be generated for my tasks?

    Dashboard, task and resource reports can be generated for your tasks. For additional details and instructions, refer to Dashboard Reports.

# Section 17 – To Do List

This tool was created as a way for users to maintain a list of To Do Items and completion dates (see Figure 1.0).

In this tool users will have access automatically to a list of "System Items" that need to be completed (i.e. password expiration notice, profile updates needed, etc.). Users are also able to create one or more To Do Lists for themselves or anyone within their access control list. The user who created the list becomes the List Admin. The List Admin has the ability to assign Admin, Participant or View Only rights to users.

To access this tool, click on the "To Do List" link from the Home page, under the Collaboration Tools menu or from the navigation bar.


**Figure 1.0 – To Do List Main**

## System Items

System items are automated notices from the portal (see Figure 1.1). These items cannot be commented on or edited.

A system item will show up if one of the following requirements needs to be met:

- Profile Changes Required.
- Password reset.
- Library Folder Approvals.
- More to be added in the future.

| | |
|---|---|
| | *Once the criteria is met, the system item will disappear from the list display.* |


**Figure 1.1 – System Items**

### View System Items

15. Select the checkbox for “System Items.”
16. Select the “Show Items” button.
17. Item/s will appear in right hand frame of screen.

## Personal To Do Lists

Personal To Do Lists are individual lists that users create to keep track of various items that need to be completed. To view a personal to do list you must have created the list or have been given access to a list. Once the list is created then it will appear in the left hand frame of the screen under the column “My To Do Lists” (see Figure 1.0).

### Create New List

Any user can create their own personal list and will automatically become the List Admin.  Users have the ability to create multiple lists (see Figure 1.2).

1. Click on the “New” button.
2. Type in the name of the List.
3. Click on the “Submit” button.
4. To cancel, click on the “Cancel” button.

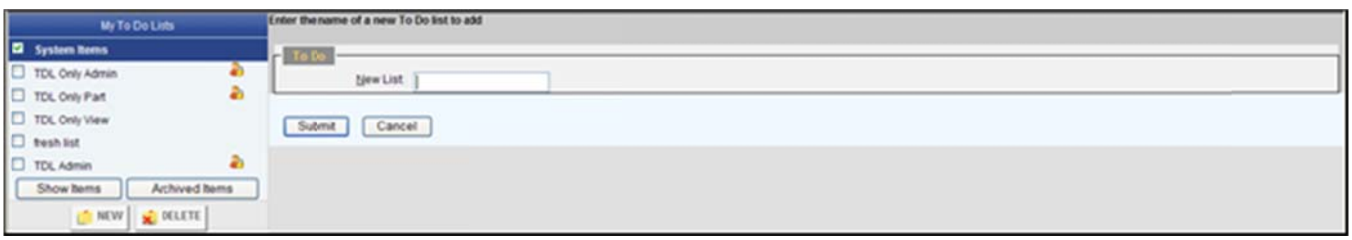



**Figure 1.2 – New List**

### Manage List Access

A user may manage access to a list if they created the list or were given admin access (see Figure 1.3).  The following rights can be designated by the List Admin:

- Admin – this role can:
  - Create, edit, and delete TDL (To Do List) and LI (List Items).
  - Archive LI.
  - Set LI priority.
  - Grant other users Admin right over TDL.
  - Grant users Admin rights over LI.

  - o Assign other users, organizations, or communities Participant or View Only rights to a TDL or LI.
  - o View all assigned items and their status
  - o Check/uncheck items as completed (marks for all users with rights to the LI).
  - o View/Add notes.
- Participant - this role can:
  - o View lists, list items, and status
  - o Check/uncheck items as completed (marks for all users with rights to the LI).
  - o View/Add notes.
- View Only - this role can:
  - o View lists, list items, and status.
  - o View notes.

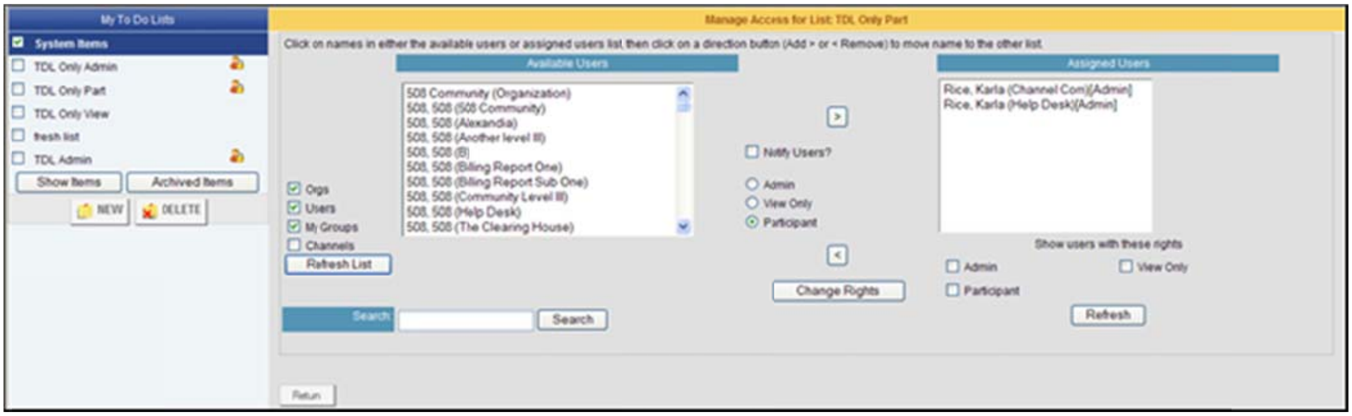



**Figure 1.3 – Manage To Do List Access**

## Granting Access

1. Select the icon next to the To Do List's name.
2. Select the "Orgs," "Users," "My Groups," and/or "Channels" check boxes.
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.
4. Click on the "Search" button.
5. Highlight the name of the user to be given access.
6. Select the radio box with the correct access right.
7. Select the "Notify Users?" checkbox if you want to send an external notification to the user regarding the list.
8. Click on the > button to grant access and move users to "Assigned Users" field.
9. Select the < button to move a user back to the "Available Users" list.
10. To show users access rights, select the checkbox next to the particular right and then click the "Refresh" button. Matches will appear in "Available Users" list.
11. Click on the "Return" button to save any modifications and return to the main screen.

## Delete Personal To Do Lists

1. Check off the To Do List where the items are housed (see Figure 1.4).
2. Select the “Delete” button.
3. Choose list name in dropdown list box.
4. Click the “Submit” button to proceed with the deletion.
5. Select the “Submit” button a second time to confirm the deletion.
6. Click the “Cancel” button to end the deletion process and return to the main screen.

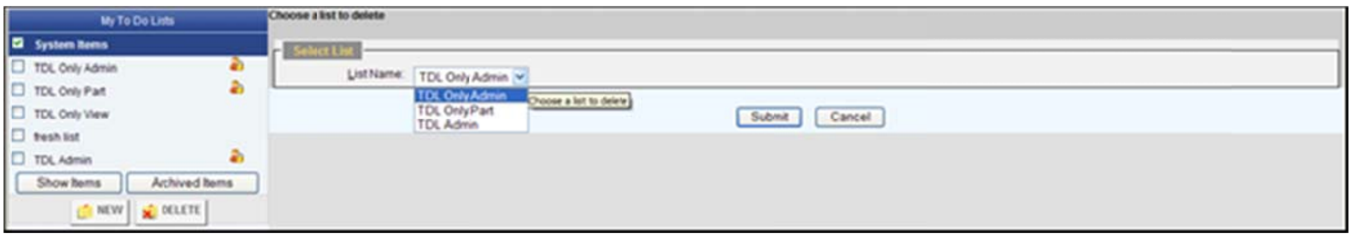



**Figure 1.4 – Delete List**

# List Items

List Items are individual items within your To Do List that need to be completed (see Figure 1.5).

## View List Items

1. Check off the To Do List where the items are housed.
2. Select the “Show Items” button.
3. Item/s will appear in right hand frame of screen.

## Add List Items

1. Select the priority level (high (default), medium or low).
2. Fill in the name of the List Item.
3. Select where the items should go in the To Do List dropdown.
4. Fill in the due date of the item (mm/dd/yyyy format) or select the  icon to choose the date from calendar.
5. Click the “Add” button to create the new item.

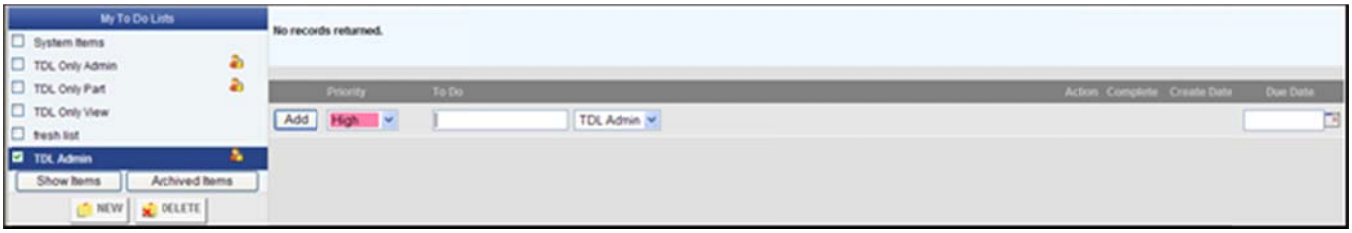



**Figure 1.5 – Add List Item**

## Manage List Items

1. Select the  icon under the Action column for the List Item (see Figure 1.6).
2. Select the “Orgs,” “Users,” “My Groups,” and/or “Channels” check boxes.
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.
4. Click on the “Search” button.
5. Highlight the name of the user to be given access.
6. Select the radio box with the correct access right.
7. Select the “Notify Users?” checkbox if you want to send an external notification to the user regarding the list.
8. Click on the  button to grant access and move users to “Assigned Users” field.
9. Select the  button to move a user back to the “Available Users” list.
10. To show users access rights, select the checkbox next to the particular right and then click the “Refresh” button. Matches will appear in “Available Users” list.
11. Click on the “Return” button to save any modifications and return to the main screen.

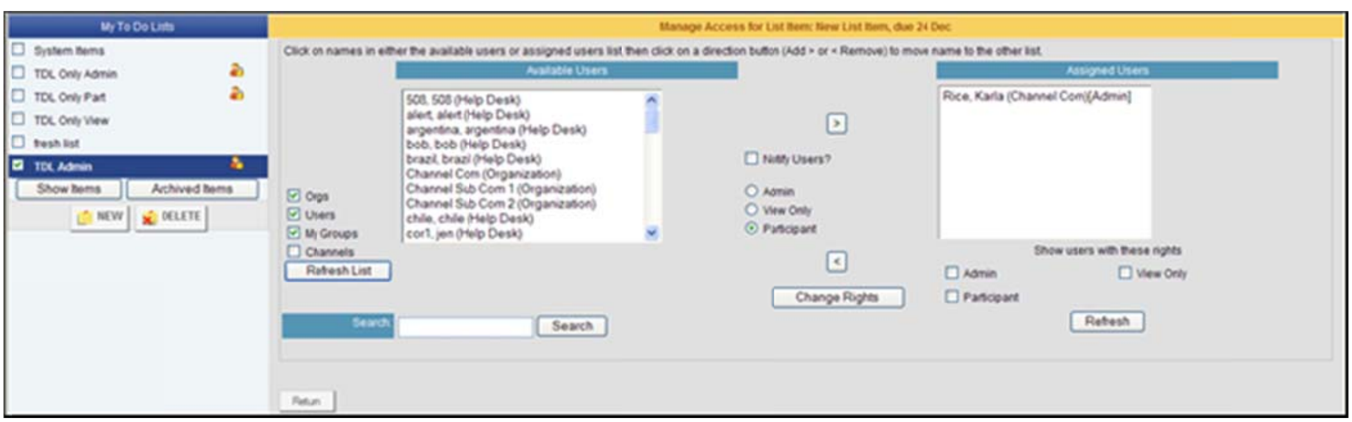



**Figure 1.6 – Manage List Item Access**

## Edit List Items

1. Select the icon (see Figure 1.7).
2. Make appropriate changes to the item (item name, to do list, priority or due date).
3. Fill in a link to an external or internal site that is related to your item (if external begin with http://).
4. Select checkbox if item is complete or needs to be archived.
5. Click on the “Submit” button to proceed with the changes.
6. Click on the “Notes” button to add important notes for the item.
7. Click on the “Back” button to cancel and return to the main screen.

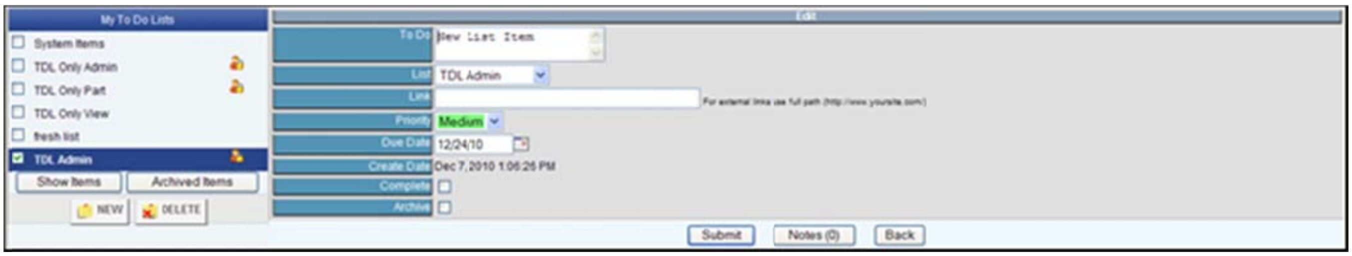



**Figure 1.7 – Edit List Item**

## Notes

This area allows users to view and/or add notes on a specific list item. Only users with specific rights will be able to add notes (see Figure 1.8).

### View Notes

To view notes, click the icon and the notes will appear in order from oldest (top) to newest (bottom).


**Figure 1.8 - Notes**

## Add Notes

1. Select the icon.
2. Fill in the comments in the "Add Notes" space provided.
3. Click on the "Submit" button to add the note.
4. Click on the "Back" button to cancel and return to the main screen.
5. Once submitted, the note can be viewed immediately.

*Notes may not be deleted once they have been submitted.*

## Select List Items

Selecting List Items gives users ability to mark or check off a group of items instantaneously. The links are located above and below the List Items (see Figure 1.9). These are the four options:

- All – checks off all items.
- None – removes check marks from all items.
- Complete - checks off only items that have been completed.
- Incomplete – checks off only items that are incomplete.


**Figure 1.9 – Select List Items**

## Delete List Items

1. Select the checkbox next to the item to be deleted (see Figure 1.10).
2. Click the "Delete" button.
3. The item will be deleted immediately.


**Figure 1.10 – Delete List Items**

| | |
|---|---|
| | *There is no confirmation of deletion before it is deleted and once an item is deleted it cannot be retrieved.* |

## Archive

Archiving items is a way to store the items of interest and to retrieve them easily in the future.

### Archiving Items

1. Select the checkbox next to the list item priority (see Figure 1.11).
2. Click the "Archive" button.
3. If more than one message is to be marked as archived, select the appropriate checkboxes and click on the "Archive" button.
4. Confirmation that "your changes have been saved" will appear on the screen.


**Figure 1.11 – Archive List Item**

### Viewing Archived Items

1. To view archived items, click on the "Archived Items" button on the left hand frame under To Do Lists (see Figure 1.12).

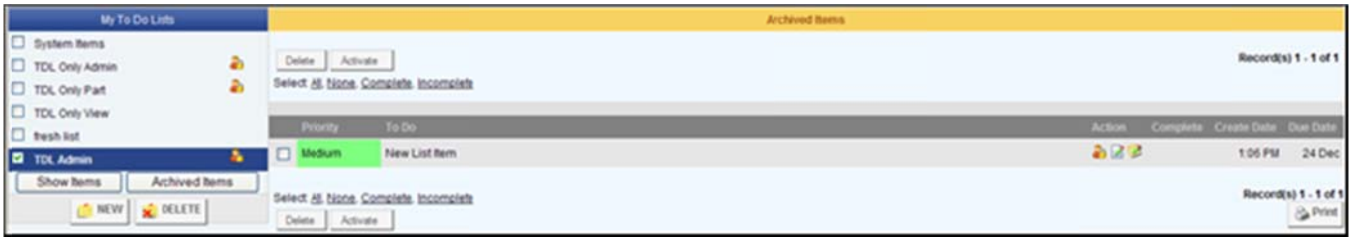



**Figure 1.12 – View Archived List Item**

## Delete Archived Items

1. Select the checkbox next to the item to be deleted (see Figure 1.13).
2. Click the "Delete" button.
3. The item will be deleted immediately.

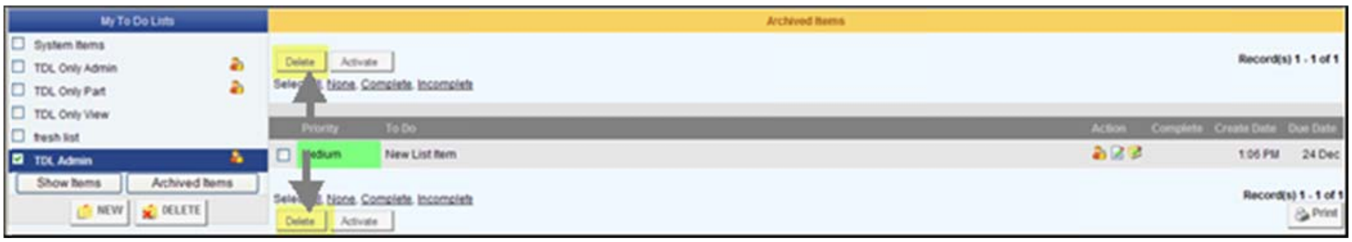



**Figure 1.13 – Delete Archived Items**

## Activate Archived Items

1. Select the checkbox next to the item to be re-activated (see Figure 1.14).
2. Click the "Activate" button.
3. The item will be reactivated immediately.

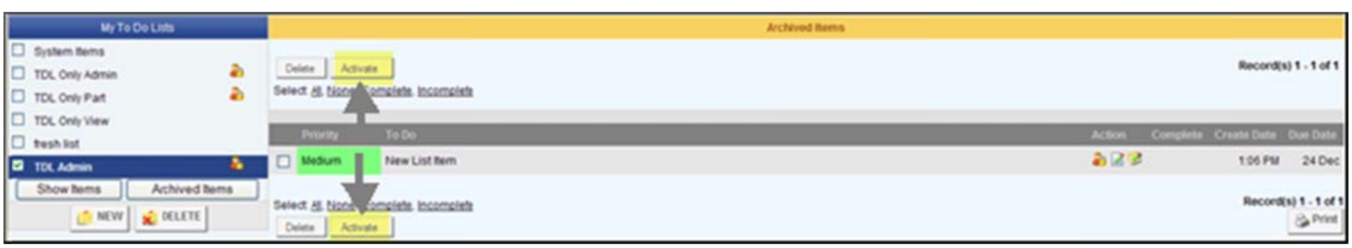



**Figure 1.14 – Activate Archived Items**

## **Mark Complete/Incomplete**

The mark complete/incomplete buttons allow you to tag an item as complete or remove the tag from a completed item. Once an Item is marked as complete, all users with access to that item will see that it is complete because it will contain a green check mark and will display the date/time of completion. Once an item is marked as incomplete the green check mark and date/time will be removed (see Figure 1.15).

1. Select the checkbox next to the list item priority.
2. Click the “Mark Complete” or “Mark Incomplete” button.
3. If more than one message is to be marked as complete/incomplete, select the appropriate checkboxes and click on the “Mark Complete” or “Mark Incomplete” button.
4. Confirmation that “you changes have been saved” will appear on the screen.

**Figure 1.15 – Mark as Complete/Incomplete**

## Print

This feature is used to print a detailed view of the list items from one or more To Do Lists. Located in the lower right hand side of the screen, once selected, this list will show up in a new window (see Figure 1.16).

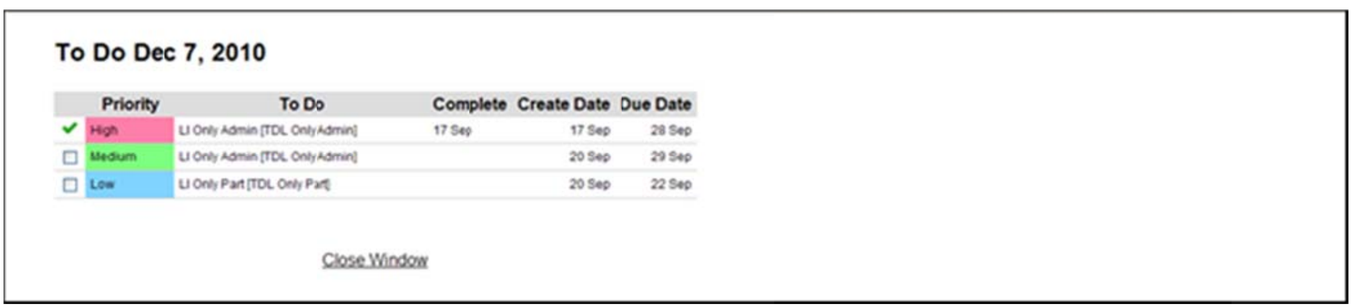



**Figure 1.16 – Print List Item/s**

# Frequently Asked Questions (FAQs)

1. What are System Items?

   Items the user needs to complete within the portal. Those items include: required profile changes, password expiration and approvals of library documents (refer to Section 2 – System Items).

2. How do I delete a System Item?

   A system item cannot be deleted by the user. Although the system item will disappear once the criteria is met on the portal.

3. How do I create a To Do List?

   Any user that has access to the portal can create a To Do List. Click on the "New" link on the left hand frame, type in a name for the list and select the "Submit" button (refer to Create New List).

4. Once I create a To Do List, how do I select users to have access?

   Once you create a To Do List, you become the administrator and can assign users access rights (i.e., admin, participant view only). Please refer to Manage List Access for detailed steps.

5. How do I delete a To Do List?

   Please refer to Delete Personal To Do Lists section. Once a To Do List is deleted, it cannot be retrieved.

6. How do I create a List Item?

   You can create a list item if you are an administrator. Please refer to Add List Items section to get detailed instructions on creating a List Item.

7. Once I create a List Item, how do I select users to have access?

   Once you create a List Item, you become the administrator and can assign users access rights (i.e., admin, participant view only). Please refer to Manage List Items for detailed steps.

8. How do I delete a List Item?

   Please refer to Delete List Items section. Once a List Item is deleted, it cannot be retrieved.

9. Is there a way to edit a List Item once it is created?

   Yes, click the icon to edit a List Item. Please refer to the Edit List Items section for more information.

10. Who can view my notes?

    Everyone that has access to your To Do List can view your notes.

11. How do I add a note to a List Item?

    Click the icon to add a note to a List Item. Please refer to the Add Notes section for detailed instructions.

# Section 18 – Webport

WebPorts are secure virtual environments for sharing information such as company developments, products and services, sales events, etc.  Since a WebPort is a website internal to the portal, it is controlled by a WebPort administrator who assigns users access rights (i.e., view or admin) to the WebPort.  Users granted admin rights will be identified as administrators.  The terms owner and originator are used interchangeably throughout this section.

To access this tool, click on the "WebPort" link from the Home page, under the Collaboration Tools menu or from the navigation bar.

## Webport Space

As shown in Figure 1.0, the "WebPort Space" screen illustrates the ability to generate and view WebPorts, send the owner an email, and manage or view WebPort access.  Under the "WebPort Name" heading, some WebPorts are shown as links, which means content has been uploaded.  When content is uploaded to the WebPort, the link is established for users to click on and view the content.

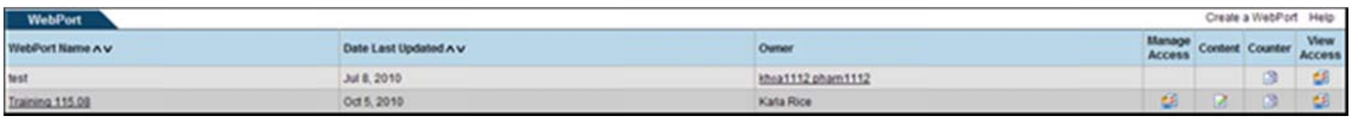



**Figure 1.0 - WebPort Space**

## Create a WebPort

1. Click on the "Create a WebPort" link at the top right of the screen (see Figure 1.0).  By creating a WebPort, the originator is automatically assigned as the owner.
2. Type in the name of the WebPort (limited to 64 characters).
3. Click on the "Create" button.
4. To cancel, click on the "Back" button.
5. The name of the WebPort is now displayed under the "WebPort Name" heading of the user's "WebPort Space" screen.

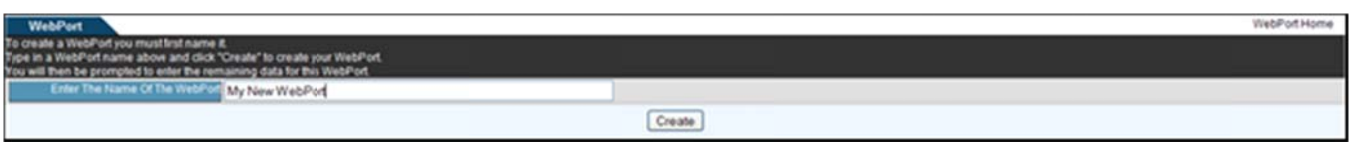



**Figure 1.1 - Create WebPort**

> *If the user fails to enter a name and selects the "Create" button, an error message is displayed that states a name must be entered.  No special characters are allowed.*

### Manage Access

At the “Manage Access” screen, administrators can grant webport access to organizations, groups, users and/or channels. There are two different rights that can be assigned to users on the portal: View Only or Admin. The default is View Only, which allows selected organizations, groups, channels, or individual users to view all content with the designated WebPort. The originator of the WebPort is automatically given admin rights. Admin access allows users to view/modify all content, upload files, add/change the TOC, add/change/remove any webpage links, delete the webport, modify name of webport and manage access. An administrator may also remove other individuals with admin rights.

1. Select the “Manage Access” button.
2. Type in general description, details, and/or comments up to 254 characters in the “General Information” field.
3. Select the “Orgs,” “Users,” “My Groups,” and/or “Channels” check boxes.
4. 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.
5. 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.
6. Click on the “Search” button.
7. Assign user rights by clicking on the “WebPort Admin Access” or “WebPort View Only Access” radio boxes.
8. Click on the > button to grant access and move users to “Users Allowed to See WebPort” field.
9. Select the < button to move a user back to the “Available Users” list.
10. Click on the “Update WebPort” button to save any modifications.
11. Select the “Finished” button to save the information and return to the “Webport Space” screen for the listing of WebPorts.

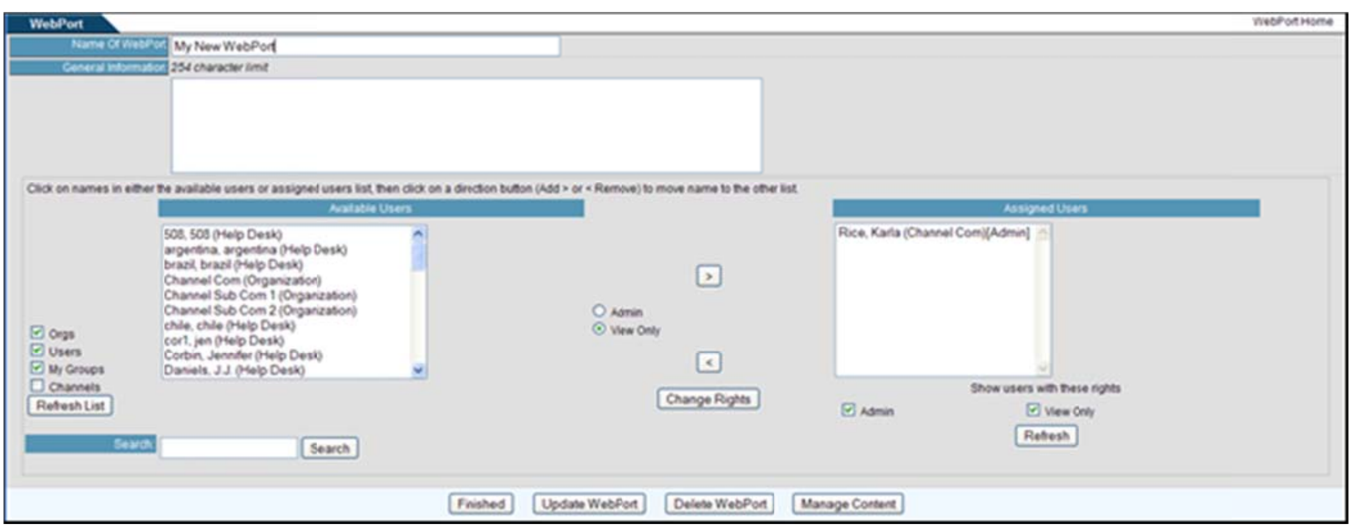



**Figure 1.2 - Manage Access**

*Organizations and users who share common compartments will be listed in the "Available Users" field. To select multiple names in a row, hold the shift key and highlight the names, select the appropriate access 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 Allowed To See WebPort" field.*

## Manage Content

The manage content area allows you to upload and manage html pages to display on your webport

Files that can be uploaded to the web pages include, but are limited to: htm, html, jpeg, bmp, gif, doc, ppt, pdf and xls. Do not use any active content, specifically JavaScript, Active X, Applets, or Cold Fusion Tags. Do not use frames or form posts. The "Help" link at the top right of the "Manage Content" screen provides more instructions and assistance.

Uploaded files are stored on the WebPort in a flat file structure. The WebPort does not accommodate the uploading of or reference to sub-folders. Therefore, save all web pages and graphics in the same folder.

Users with admin access can add and manage content for the WebPort.

1. From the "WebPort Space" screen, click on the "Content" link under the "Manage WebPorts" heading.
2. From the "Manage Access" screen, click on the "Manage Content" button and the "Manage Content" screen prompts the user to upload files to the WebPort (see Figure 1.3).

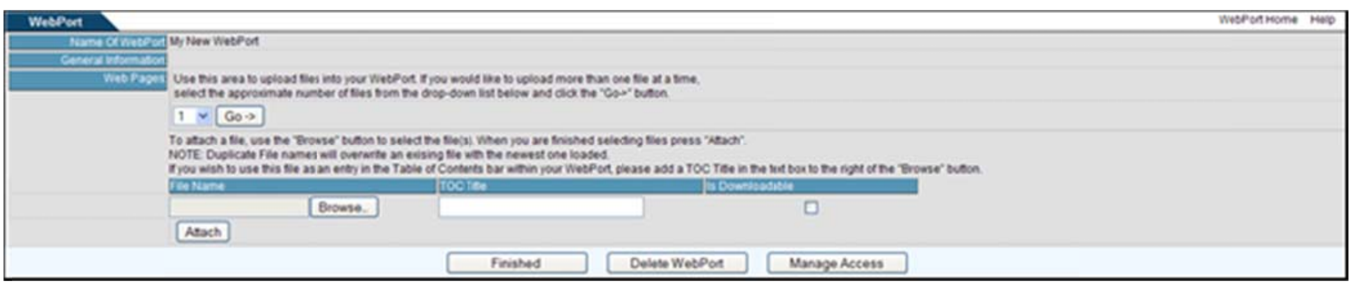



**Figure 1.3 – Manage Content**

## Creating Web Pages

Basic HTML knowledge is recommended to develop your site but it is possible to create a simple web page with little or no knowledge HTML. To create your pages, you will need a web development program such as Microsoft FrontPage or Macromedia Dreamweaver. However, if you do not have access to these types of programs, you can also use Netscape Navigator (version 4.73 and higher has a built-in web development application) or even Microsoft Office (which will allow you to save files as HTML pages.)

In most HTML editing programs, you will have the ability to create hyperlinks to link from one HTML page to another HTML page within the WebPort. To create a hyperlink, use web editor's hyperlink feature and type in the file name. Users cannot link to other pages/tools within the portal (e.g., library, calendar, etc.), but can create hyperlinks to link to pages outside the portal (out of secure environment). User may also choose to create links to images and other documents (pdfs, word docs, etc.) within their web pages.

Using your web development program, you should first create an HTML page that will be your "Home Page" within your WebPort. This page will be the first thing that users see when accessing your WebPort. Your "Home Page" can have any name but must have a .htm or .html file extension. The "Home Page" may include your logo, mission statement, contact information, etc. It may also contain links to other pages in your WebPort (described later). Once you have created your Home Page, log into the portal to upload it.

*The Support Center cannot assist in the creation of the HTM/HTML pages for the webport, but may provide guidance using the tools within the webport.*

## Upload File/s

As shown in Figure 1.3, to upload a file or multiple files:

1. Use the drop down arrow and select the number of files to be uploaded.
2. Click on the "Go" button. The "File Name" area is automatically updated with the number of upload boxes.
3. Click on the "Browse" button to select the file(s) for each upload box.
4. Type a Table of Contents title in the "TOC Title" text box to create a TOC link that appears on the left side of the WebPort. TOC links may be used to access the various web pages. TOC links can be created while uploading files or after files have been uploaded to the WebPort.
5. Create downloadable links for file types that are not htm. or html. by clicking on the "Is Downloadable" check box.
6. Once the downloadable link is created, the user can click on the TOC link, displayed on the Web Port, and select the option to view or download the file instead of viewing from the Web Port.
7. Click on the "Attach" button after all files are selected.
8. Scroll to view the files that have been uploaded under the "Uploaded Web Pages" field and the TOC link titles are listed under the "Table of Contents" field (see Figure 1.4). Each file is a separate web page.

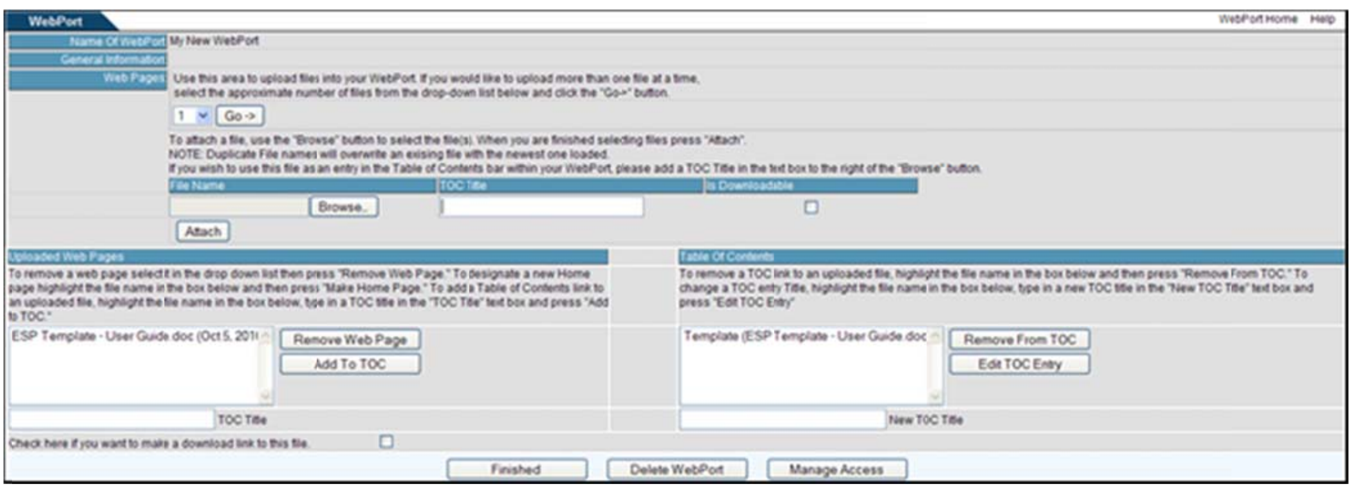



**Figure 1.4 - Upload Web Pages**

*Graphics and documents referenced (i.e. pdf, doc, etc.) in the web pages must be uploaded as separate files. For example, if two graphics are contained in one html page, then three files are uploaded to the Web Port—the html page and two graphic files. The files associated with the html page must reside in one folder. Uploading large graphic files will take longer to load and slow down the viewing of the web page. Avoid .gifs or .jpg files over 50 KB. Make sure you don't give these files a TOC name or else they will appear as a separate webpage in your webport.*

## Important Tips

- Develop a 'flat' site that does not use frames.
- Graphics must be uploaded separately from your HTML pages.
- Please keep graphics to a minimum! Large graphics slow down the viewing of your site. While it may be beneficial to use a logo or photo that is larger than 50K, please use them sparingly and realize that users might not want to wait for huge graphics to load! Try to avoid .gifs or .jpgs over 50KB. Bullets, horizontal rules, buttons, icons, etc. are usually under 10KB and are perfectly fine.
- All files are loaded into a single folder so if you upload a new file with the same name as an old file, the new file will replace the old file.
- Since the WebPort process saves your files in a single folder, do not reference sub-folders or parent folder in your HTML. (Graphics should be saved in the same folder as the HTML file.)
- TOC links are listed alphabetically in the left-hand frame of your WebPort.
- Try to avoid links to sites outside of the Portal that will take users outside of the secure environment. Outside links may still be referenced using text.
- For additional assistance and/or instructions on the webport, click the "Help" link at the top right of the "Manage Content" screen.

### Delete WebPort

Once a WebPort is deleted, it cannot be retrieved.

1. Select the "Manage Access" or "Manage Content" button.
2. Click on the "Delete WebPort" button.
3. A confirmation screen is displayed (see Figure 1.5).
4. Select the "Delete" button to continue with the deletion.
5. To cancel the action, click on the "Cancel" button and return to the "WebPort Space" screen.


**Figure 1.5 – Confirmation**

## View WebPort

Once a WebPort has been created and content uploaded, a WebPort name becomes a link for users to select and view the Web Port.

1. From the "WebPort Space" screen, "Web Port Name" heading, click on the WebPort link.
2. As shown in Figure 1.6, a WebPort contains two frames. The TOC links are listed on the left side and the right frame contains the information from the files that were uploaded. TOC links marked with a "(D)" beside the title are files that were uploaded as downloadable links.
3. To view the web pages, click on the TOC links.
4. To close the window and return to the "WebPort Space" screen, click on the "Close Window" button (if JavaScript is enabled) or select the "X" from the browser.

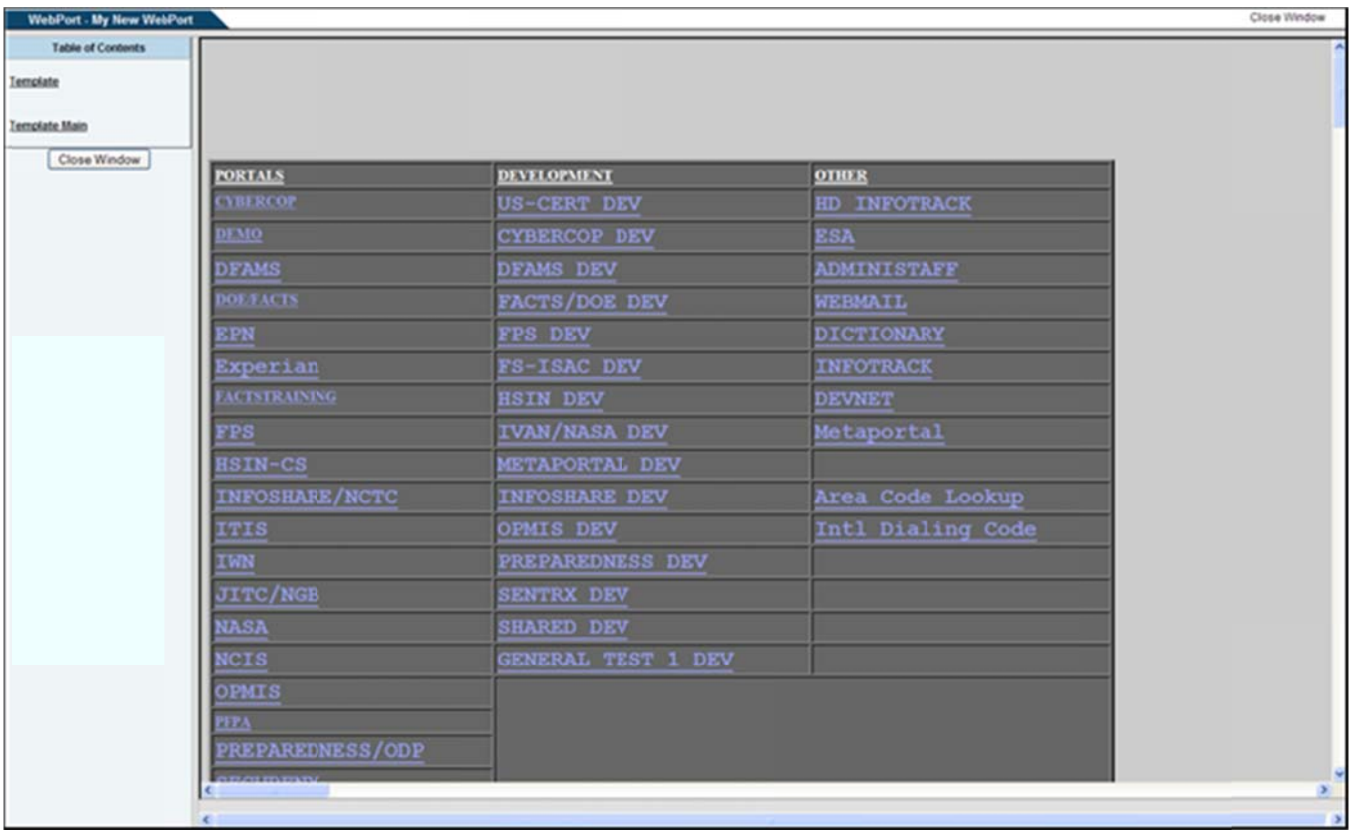



**Figure 1.6 - WebPort Sample**

## Alter Webport Name and Information

The name and general information for a webport can be changed at any point in time. Follow the instructions below to alter the name and/or information:

1. Select the "Manage Access" button.
2. Fill in the name of the Webport.

3. Type in general description, details, and/or comments up to 254 characters in the “General Information” field.
4. Click on the “Update WebPort” button to save any modifications.
5. Select the “Finished” button to save the information and return to the “Webport Space” screen for the listing of WebPorts.

## Update Access

Users can always be added/removed from the Webport (Refer to “Manage Access” section and/or rights can be updated. To update user rights:

1. Select the “Manage Access” button.
2. Highlight the user name/s under “Assigned Users.”
3. Select the radio box for the appropriate right in the center.
4. Click the “Change Rights” button.
5. Click on the “Update WebPort” button to save any modifications.
6. Select the “Finished” button to save the information and return to the “Webport Space” screen for the listing of WebPorts.

## Counter

The “Counter” link allows administrators to view web page activity.

1. From the “WebPort Space” screen, click on the “Counter” link for a particular WebPort.
2. To select a time frame, use the drop down arrow for the “Going Back” field and highlight the time frame.
3. A report can be sorted by URL (file name), time of last accessed, and “Number of Page Loads. Use the drop down arrow to highlight the sort option (see Figure 1.7).
4. Click on the “Generate Report” button to run the report.
5. To return to the “WebPort Space” screen, click on the “Cancel” button.


**Figure 1.7 – Counter**

*The “Number of Page Loads” indicates the number of times the page has been loaded to the screen. It does not include unique visitors.*

As shown in Figure 1.8, the report displays the files accessed (URL’s), last date of accessed, and the number of pages.


**Figure 1.8 - Counter Report**

## View Access

Users granted view access only rights can see a list of users by clicking on the “View Access” link under the “Manage WebPort” heading. In Figure 1.9, a list of users granted access to a WebPort is displayed by user name and user organization. Click on the “Cancel” button to return to the “WebPort Space” screen.


**Figure 1.9 - Access List**

# Frequently Asked Questions (FAQs)

1. How do I create a WebPort?

   Any user that has access to the portal can create a WebPort. Click on the "WebPort" link under Collaboration Tools or from the navigation bar and click on the "Create A WebPort" link (refer to Create a WebPort).

2. Once I create a WebPort, how do I select users to have access?

   Once you create a WebPort, you become the administrator and can assign users access rights (i.e., view or admin). Please refer to Manage Access section for detailed steps.

3. Why can't organizations or groups have admin access rights?

   Since there role and rights conflicts could occur within the system, the tool does not allow whole organizations or groups assigned admin access rights. In addition, administrators manage access and can delete other administrators.

4. After the WebPort is no longer required, how do I delete a WebPort?

   Please refer to Delete WebPort. Once a WebPort is deleted, it cannot be retrieved.

5. How do I upload content to my WebPort?

   Use a web development program to create web page files (e.g., htm. or html.). Once the files and any graphics are stored in the same folder on your computer, upload the content by selecting the "Content" link under the "Manage WebPorts" heading or click on the "Manage Content" button from the "Manage Access" screen. Refer to the section,Manage Content, for specific instructions.

6. Do files have to be in html format to be uploaded?

   No. Files that are not html can be uploaded as downloadable links. From the "Upload Web Pages" screen click on the check box to make a downloadable link. Refer to Important Tips for details.

7. Once I click on the "WebPort" link from my home page, how do I view a WebPort?

   The WebPort that contains content will be displayed as a link. Click on the WebPort name and the home page of the WebPort is shown with two frames: Table of Contents on the left and information on the right. For more information, refer to View WebPort.

8. What does "Counter" mean?

   This link provides administrators the ability to view web page activity. Once this link is selected, a report can be generated to include file name, time of last accessed, and number of page loads.