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SYSTEM OVERVIEW GUIDE FOR HSIN-NEXTGEN SPIRAL 2

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1 June 2009

**System Overview Guide
for the
Homeland Security Information Network
Next Generation System
(HSIN NextGen)
Spiral 2**

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Department of Homeland Security**

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Revision History

Revision	Description	Incorporated	
		Date	Initials
0.8	Initial Release	20 May 2009	JJB
1.0	Completed Meeting Rooms and added Polls and Surveys (Content Rating)	22 May 2009	JJB
1.1	Updated Feedback & added Survey Forms	26 May 2009	JJB
1.2	Updated per reviewer feedback	30 May 2009	JJB
1.3	Updated Announcements.	1 June 2009	JJB

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1 Scope

This document will familiarize the reader with Spiral 2 capabilities of the Homeland Security Information Network Next Generation (HSIN NextGen) system.

1.1 Identification

This document covers general user functionality of the Spiral 2 HSIN NextGen system. It will describe how to login to the HSIN NextGen portal, how to navigate among Communities of Interest (COI), and how to utilize portlet applications to accomplish general user functionality.

This document will not cover administrative functions such as:

- creating Communities of Interest (COI)
- creating, configuring and adding content to COI pages
- creating and managing user accounts, roles, and organizations
- nominating & vetting users for membership in COI
- managing system and content permissions
- system usage reports & metrics

Formal training for administrative functions will be developed by SIM-G.

1.2 System Preparation

The information contained in this document is relevant to a deployed and configured Spiral 2 HSIN NextGen system. A minimal configuration of the system is described below to facilitate utilization of the information of this document prior to adoption of the Spiral 2 HSIN NextGen system in a production environment. Configuring the HSIN NextGen system as described in this section is a task for system and COI administrators and cannot be performed by general users.

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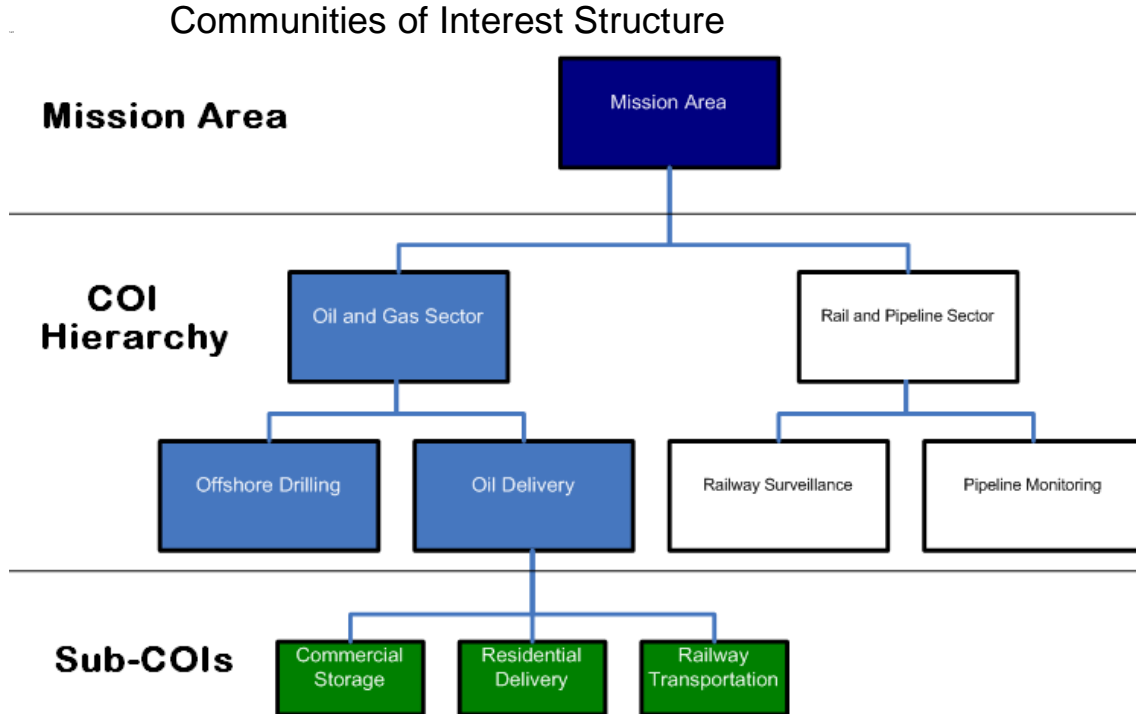


Figure 1 - HSIN Portal COI Structure

HSIN NextGen system content and functionality is partitioned into sets of Communities of Interest (COI). These COIs represent a grouping of individuals with a common area of interest or related missions. Communities span both the commercial and government sectors and are intended to allow individuals within communities to share information relating to DHS objectives. The Web Portal represents these COIs as a hierarchy of organizations to which user accounts are added as members.

1.2.1.1 Mission Area

A Mission Area is a top level COI in the HSIN NextGen system. A Mission Area COI will have a set of portal pages populated with portlets that will provide access to content and functionality specific to the Mission Area. A Mission Area will have a corresponding Content Management System (CMS) repository folder which is defined such that content posted to the Mission Area folder will be visible to all the Mission Area's child COIs.

1.2.1.2 COIs

A hierarchy of COIs stems from a Mission Area. Each COI is a child of either the Mission Area or another COI. Each COI will have a set of portal pages populated with

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portlets that will provide access to content and functionality specific to the COI for its members. Each COI will have a CMS folder associated with it such that content posted to the COI's folder will be accessible to all the COI's members and child COI members.

1.2.1.3 Sub-COIs

A COI can have multiple Sub-COIs under it. These Sub-COIs cannot have any child nodes and do not have a set of portal pages associated with them, but they can have CMS folders created for them. These Sub-COI folders can have "Ad Hoc" document folders created under them which can either inherit permissions from their parent Sub-COI folder or be assigned their own permissions. Members of a Sub-COI are also members of its parent COI so that they can access the parent COI's portal pages.

Roles

The HSIN NextGen system uses a role construct for regulating user activity in the system. A role is a set of permissions which in turn are defined as allowable actions on resources. COI members are assigned to one of three roles to determine their permissions for the COI's resources:

- Viewer – defines permissions granted to general members of the COI. The permissions granted to this role will be limited to view portlet and Content Management System (CMS) content for their specific COI. For example, in the context of the Calendar portlet, a user with the Viewer role would be given view access to the COI calendar, but not be allowed to add, edit or delete events, configure the portlet, or export event data.
- Contributor – defines permissions granted to the contributors of content for a COI. Users given this role inherit the Viewer role permissions plus they can add, edit, and delete portlet and CMS content for their specific COI. Continuing the example of the Calendar portlet, a user with the Contributor role would be given view access to the COI calendar as well as be allowed add, edit or delete events.
- Admin – defines permissions granted to designated administrators of a COI. Users given this role inherit both the Viewer and Contributor role permissions plus they can configure the portlets for the COI as well as have full control over the CMS folders associated with their COI. Continuing the example of the Calendar portlet, a user with the Admin role can view, add, edit, delete events, configure the portlet, and export event data.

Note that a user can be a member of two different COIs and have a different role for each. Their role within a COI defines their permissions for that COI only and does not translate to any other COI they may be a member of. For example a user can have the Viewer role for COI A, and the Contributor role for COI B. In this case the user has different permissions in the different COIs.

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COI CMS administrators can create sub groupings of the Contributor role on the CMS. These sub groupings of the Contributor role can then be granted the appropriate permissions to “Ad Hoc” document folders created under Sub-COI folders on the CMS.

User Accounts

Each COI (except the Mission Area COI) will have user accounts assigned to be members of it. Upon gaining membership to the COI, user accounts are be assigned to one of the roles described in the Roles section above within the COI.

User accounts can be assigned to more than one COI and can be assigned different roles in each COI.

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2 Referenced Documents

The following documents were used in the formation of this document.

2.1 Government Documents

None.

2.2 Non-Government Documents

- Adobe® Acrobat® Connect™ Pro 7 Using Adobe Acrobat Connect Pro 7, 2008.
- EMC® Documentum® WDK for Portlets Version 6.5 User Guide, P/N 300-007-402 A01, July 2008.
- EMC® Documentum® Webtop Version 6 SP1 User Guide, P/N 300-006-013 A01, December 2007.
- System Design Document (SDD) for the Homeland Security Information Network Next Generation System Spiral 2, Document Number: 20704023, version 0.1, 21 November 2008.

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3 User Testing Support

GDOS will support the User Acceptance Testing (UAT) activity by providing support personnel available on site with additional support personnel available via email or telephone. The GDOS support personnel will document findings of the UAT activity and generate a report based on the feedback for delivery to DHS and FEMA.

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4 Functionality

This section describes the general user functionality provided by the HSIN NextGen system. It provides sections that describe how to login to access the system and how to navigate through the system to access information and functionality specific to a Community of Interest (COI) as well as to an individual user. Sections are included describing how to use application portlets on various pages to accomplish tasks such as being notified of alerts, announcements and the national threat level, accessing documents from the Content Management System (CMS) repository, chatting with other users, conducting online meetings, participating in discussion boards, accessing a calendar of upcoming events, reading current news articles, accessing links to relevant Web sites, and working on tasks.

4.1 Logging on to the HSIN NextGen Portal

This section provides instructions on logging into the HSIN NextGen portal and provides an overview of what the user will see upon successful login.

Overview

Connecting to the HSIN NextGen system is done through a Web browser. Once the user has navigated to the appropriate URL, they can enter their credentials and access the system. The HSIN NextGen system utilizes single sign on technology so that once a user provides credentials to access the portal the user will not be prompted to provide credentials to most other systems accessed through the portal's applications. Accessing Meeting Rooms (Connect) and Chat (Jabber) will prompt the user to re-enter their credentials.

Setup

Prior to a user logging on to the HSIN NextGen system, it is assumed that the system administrator will have created an account for the user, added the user's account to the appropriate COIs so that the user can access COI portal pages and content, and add the user's account to the appropriate COI and CMS roles so they can have the proper content access rights.

Procedure

Open a Web browser (supported browsers include Internet Explorer 6 & 7 and Mozilla Firefox 2) and enter the URL for the HSIN portal. Enter the user name and password which were supplied by the system administrator and click the "Log In" button or simply press the "Enter" key on the keyboard.

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U.S. DEPARTMENT OF HOMELAND SECURITY

Homeland Security Information Network

Welcome to HSIN

New Look with Improved Security

Your existing HSIN Username and Password remain unchanged.

User Name:

Password:

You are about to access a U. S. Government computer/information system. Access to this system is restricted to authorized users only. Anyone who accesses this system without authorization or exceeds authorized access could be subjected to a fine or imprisonment, or both, under Public Law 98-473. By accessing the system you consent to having your activities and or access recorded by system software and periodically monitored. If this record reveals suspected unauthorized use or criminal activity, the evidence may be provided to supervisory personnel and law enforcement officials.

DO NOT PROCESS CLASSIFIED INFORMATION ON THIS SYSTEM

U.S. Department of Homeland Security

Figure 2 - HSIN NextGen login page

After successful login, all users are directed to the National Level landing page. This page, maintained by DHS Ops will contain information, news, announcements, training information, etc. pertinent to all HSIN users.

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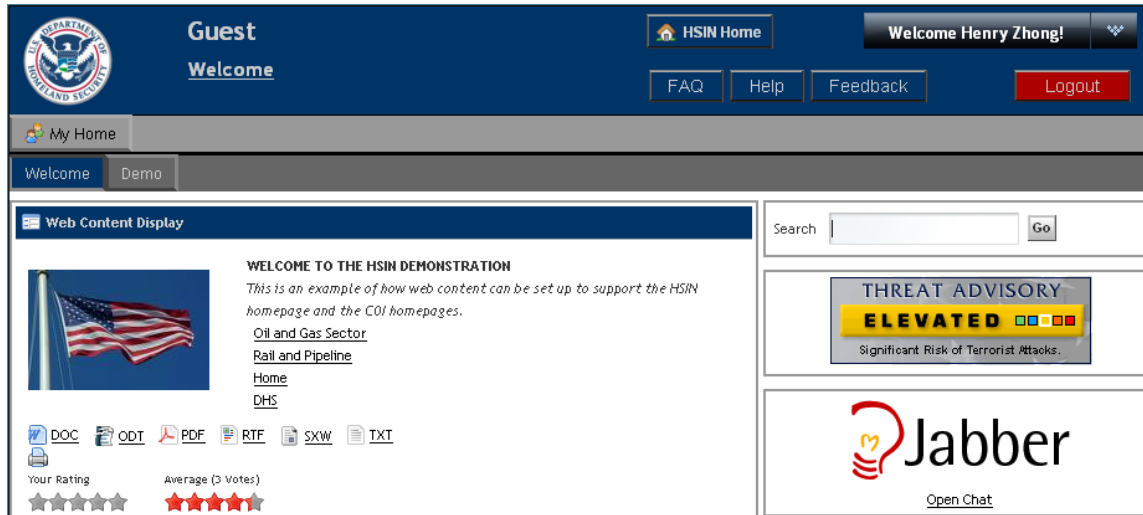


Figure 3 - Example National Level page

Every web page displayed in the HSIN NextGen portal will have a top banner which displays the Department of Homeland Security logo and the name of the currently selected content tabs. The top banner also contains several buttons which you will see at the top of all pages:


- HSIN Home – click this button to go directly to the HSIN home page.
- FAQ – click this button to see the Frequently Asked Questions (FAQ) which might help you resolve a question you have about using the HSIN NextGen system that other users have also had questions about.
- Help - click this button to see Help documentation which might help you resolve a question you have about using the HSIN NextGen system.
- Feedback – click this button to provide feedback to or ask a question of the HSIN help desk via a form in which the user enters their name, a rating (Excellent, Good, Satisfactory or Poor) and a textual comment / question.
- Logout – click this button to logout of the HSIN NextGen web portal.
- Welcome menu – in the upper right of the page is a button labeled “Welcome UserX!” where UserX is replaced by the user name. Clicking or hovering the mouse pointer over this button displays a menu of items:
 - HSIN Home – navigates to the HSIN Home page.
 - Control Panel – allows the user to access a number of their account settings such as which roles and organizations they belong, the web pages displayed in their private space, and Web Content.

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- My Account – navigates directly to the user account control panel item.
- Toggle Edit Controls – toggles the setting to show or hide the Edit controls on each portlet. The Edit controls appear as the  icon and are visible by default on all portlets within the user's private My Home pages. The edit icon will also be displayed on the portlets within the COI pages if the user is a member of the COI Admin role.

Four other items are visible on all pages:

- Search box – enables searching the HSIN NextGen site for keywords entered in the search dialog followed by clicking the “Go” button.
- National Threat Advisory – displays the current threat level.
- Chat – used to conduct Instant Messaging (IM) with other users.
- Announcements - displays incoming announcements & notifications sent by an authorized user.

4.2 Navigating within the HSIN NextGen Portal

This section provides instructions on how to navigate among the various Community of Interest (COI) pages as well as the user's private pages.

Overview

The HSIN NextGen system portal is arranged into a set of tabbed pages corresponding to the Communities of Interest (COI) to which the user is a member as well as a tab for the user's personal space. Each tab is further subdivided into a set of sub tabs corresponding to functionality and content available in the context of either the COI or the individual user. Tabs will not be displayed for COIs which the currently logged in user is not a member.

Setup

It is assumed that the user is a member in at least one COI.

Procedure

Multiple tabs appear under the Homeland Security icon on the top left of the HSIN NextGen page. One of these tabs will be labeled “My Home” and the other tabs will be named for the COI they pertain to.

Functionality

Click the “My Home” tab. The tab's background color will darken and three sub tabs will be displayed: Welcome, My Documents and My Bookmarks. The first sub tab, Welcome, is selected by default as indicated by its darker colored background. The user

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can select one of the other sub tabs to display their content or the user can select the tab of one of the COIs displayed to the right of the “My Home” tab.

The screenshot shows the 'My Community' interface for user Henry Zhong. The top navigation bar includes 'HSIN Home', 'Welcome Henry Zhong!', 'FAQ', 'Help', 'Feedback', and 'Logout'. Below this is a sub-tab bar with 'My Home' (selected), 'Chat Test', 'Welcome', 'My Documents', and 'My Bookmarks'. The main content area is divided into several sections:

- RSS**: A feed titled 'DHS Press Room' with a post from 5/13/09 11:00 AM. The post is titled 'Secretary Goes to Florida with New FEMA, ICE Leaders' and includes a 'Homeland Security' logo. Below the post are links for 'Secretary Napolitano's Testimony on FY 2010 Budget Request'.
- Search**: A search bar with a 'Go' button.
- THREAT ADVISORY**: A yellow box with the text 'ELEVATED' and 'Significant Risk of Terrorist Attacks'.
- Announcements**: A section with a sub-tab 'Entries'.
- Calendar**: A calendar view for May 14, 2009 (Thursday). The calendar shows dates from 26 to 31. A table to the right of the calendar lists events with columns for 'Time', 'Title', and 'Type', but it states 'There are no events on this day.' and 'Showing 0 results.'

The footer of the page displays 'HSIN' on the left and 'Welcome My Documents My Bookmarks' on the right.

Figure 4 - User's private My Home Welcome page

Selecting one of the COI tabs to the right of the “My Home” tab updates the Web browser to display the contents of that COI.

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The screenshot displays the COI Welcome page interface. At the top, there is a navigation bar with the Department of Homeland Security logo, the text "Chat Test", and a "Welcome" message. A "HSIN Home" button and a "Welcome Henry Zhong!" notification are also present. Below this is a secondary navigation bar with buttons for "FAQ", "Help", "Feedback", and "Logout". A main navigation bar includes links for "My Home", "Chat Test", "Welcome", "Document Library", "Image Library", "Bookmarks", "Forums", "Members", "Meetings", and "Reports".

The main content area features a "Calendar" portlet for May 7, 2009, showing a large "7" for Thursday. To the right of the calendar is a search bar with a "Go" button. Below the search bar is a "THREAT ADVISORY" box with a yellow background and the word "ELEVATED" in red, indicating a "Significant Risk of Terrorist Attacks".

At the bottom, there is an "RSS" portlet titled "DHS Press Room" with a timestamp of "5/6/09 11:00 AM". It lists several news items, including "Secretary Napolitano's Media Briefing on H1N1 Flu Outbreak" and "Secretary Napolitano's Testimony on Oversight of the Department of Homeland Security".

Figure 5 - COI Welcome page

4.3 Portlets Visible on All Pages

Several portlets appear in the right hand column of all pages in the HSIN NextGen system. This provides quick access to portlets that can be utilized in all contexts as well as ensures that critical information such as national threat advisory level, alerts and announcements will be visible to users independent of their current activity.

Alerts

This section provides instructions on how to see and dismiss alerts from any web page.

4.3.1.1 Overview

The Alerts portlet displays incoming messages sent by a COA Admin user. The Alerts portlet is hidden from general users until an alert is received. COI Admin users will have

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access to the Alerts portlet at all times which allows them to send alerts after providing a message and selecting who to target the alert to.

4.3.1.2 Setup

A COI Admin user should send an alert to all users so they can see the alert displayed in the Alerts portlet.

4.3.1.3 Procedure

Navigate to a COI or My Home page to see the Alert portlet, if an alert has been sent.

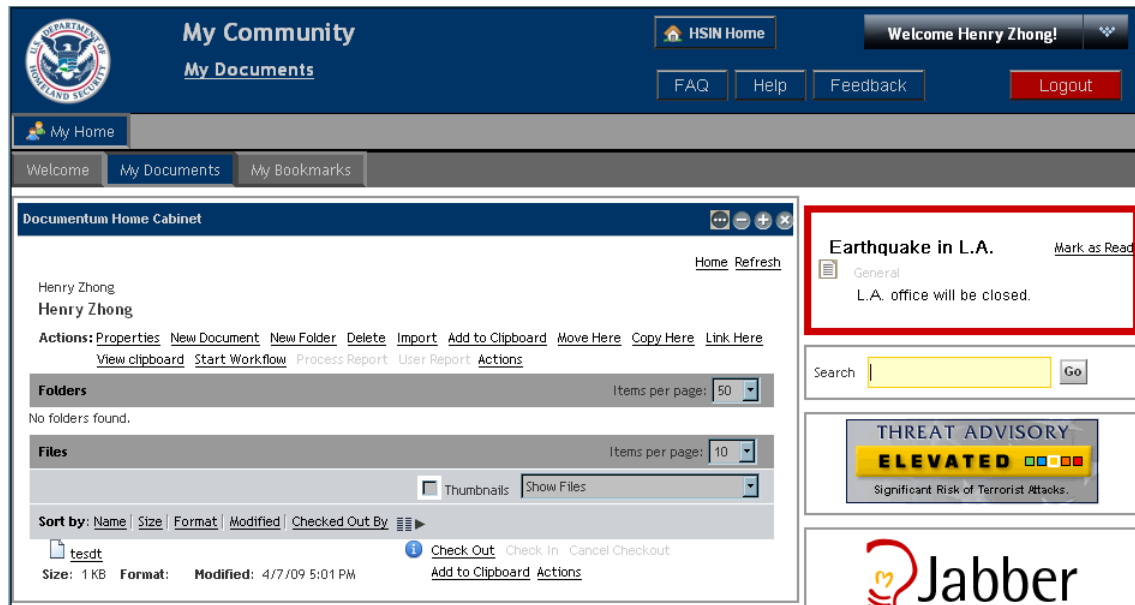


Figure 6 - Alert displayed in red box on right

4.3.1.4 Functionality

When an alert is received, the alert message will be displayed in the right hand column within a red box on all web pages. The alert will remain displayed until it has been dismissed by the user or expires.

The user can dismiss an alert by clicking the Mark as Read link next to the alert message in the Alerts portlet.

Announcements

This section provides instructions on how to see, mark as read, and reshown announcements from any web page.

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4.3.2.1 Overview

The Announcements portlet displays incoming announcements & notifications sent by a COI Admin user. COI Admin users can utilize the Announcements portlet to send announcements after providing a message and selecting who to target the announcement to.

4.3.2.2 Setup

A COI Admin user should send a few announcements to all users so they can see the announcements displayed in the Announcements portlet.

4.3.2.3 Procedure

Navigate to a COI or My Home page to see the Announcements portlet.

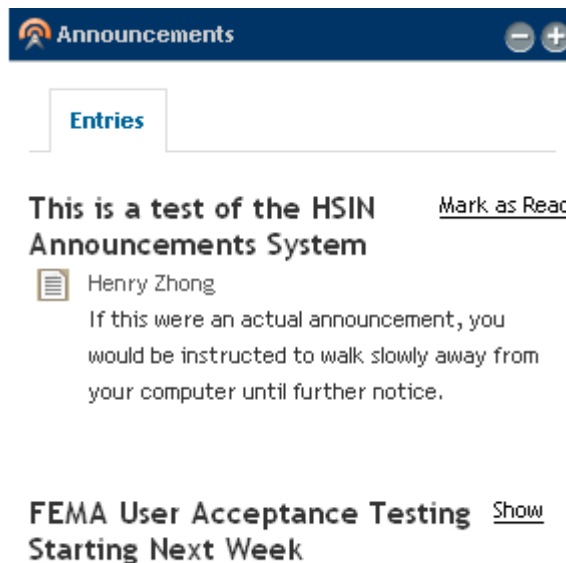


Figure 7 - Announcement portlet

4.3.2.4 Functionality

Multiple announcements can be displayed by the Announcements portlet at one time. Announcements are displayed until they are dismissed by the user. Users dismiss individual announcements by clicking the Mark as Read link next to the announcement title. Marking an announcement as read hides the announcement message so only the title is displayed and replaces the Mark as Read link with a Show link.

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Users can revisit dismissed announcements by clicking the Show link next to the announcement title. Dismissed announcements will remain available until they expire. Announcement expiration is determined by the user that sent the announcement.

Chat / Jabber

This section provides instructions on how to collaborate with one or more users through a Chat client. With the Chat client, users are able to:

- add and remove users to and from their list of contacts
- see the status of their list of contacts
- set the status their contacts see for them
- initiate a chat with one of their contacts
- create and configure a chat room so that multiple users can chat together at once
- invite users to chat room
- join and exit chat rooms
- chat privately with an individual user while in a chat room
- delete a chat room
- remove and ban users from a chat room

4.3.3.1 Overview

A user can use the Chat client to conduct Instant Message (IM) conversations with individual users or with a group of users through a chat room.

4.3.3.2 Setup

It is assumed that the system administrator will have configured the Jabber server so the users can conduct chats.

4.3.3.3 Procedure

Users access the Chat client from any COI or My Home web pages by clicking the Open Chat link displayed under the Jabber icon on the right hand side of the page. A new Web browser window will pop up prompting the user to enter their Chat login credentials. After supplying valid credentials, the Web browser will display the Chat client.

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Figure 8 - Chat client displaying user's contact list

Chats can also be initiated with individual users through the Members portlet as described in the Members section of this document.

4.3.3.4 Contact List Functionality

The primary display of the Chat client displays the user's list of contacts.

4.3.3.4.1 View Contact List

Contacts can be organized into groups which can be expanded and contracted in the display to aid finding a desired contact. Each group displays a count of the number of contacts within it and the number which are currently available to chat with. Contacts which do not belong to a group will be placed in the Unfiled group.

The status of each contact is displayed as an icon to the left of the contact's nickname.

- | | |
|---------------------------|--------------------------------------|
| - User is online | - User doesn't want to be disturbed |
| - User is willing to chat | - User is offline |
| - User is away | - User is invisible |
| - User is not available | - User hasn't authenticated the user |

4.3.3.4.2 Set Status

Users can set their status by clicking the status icon displayed to the left of their user ID above their contact list in the Chat client. Clicking their status icon allows them select

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their status and optionally provide a status message. Once they select their status and click the Set button, all users will see the updated status value in their contact lists.



Figure 9 - Selecting user's status for contacts to see

Users can also set a different status for themselves per user. To set a user's status differently for an individual contact, right click the contact in the contact list and select Presence which allows the user select their status and optionally provide a status message just for this contact. Once they select their status and click the Set button, the contact will see the updated status value in their contact lists, but other users will continue to see the user's global status.

4.3.3.4.3 Add Contact

Add a contact by clicking the  icon which allows the user to enter the ID of user to add to the contact list in the Send subscription to text field and optionally modify the message that will be sent to them. Clicking the Send button adds the new user to the contact list in the Unfiled group with a nickname identical to their user ID.

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Figure 10 - Adding a contact

4.3.3.4.4 Edit Contact

Edit a contact by right clicking contact in the contact list and selecting Edit User. A new Web browser window will open displaying the contact's nickname and list of groups for the current user and the list of groups the contact currently belongs to. The user can edit these values and then click the OK button to save the changes. The user can create a new group by entering its name in the Group text field and clicking the > button to add the contact to the new group. Contacts can be added and removed from groups by selecting the group and clicking the > or < buttons.

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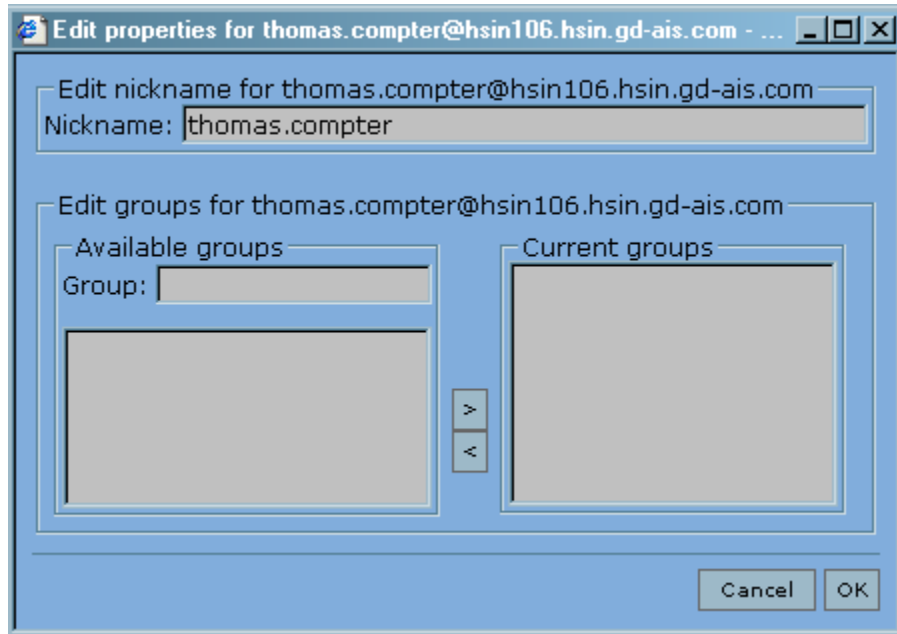


Figure 11 - Editing a contact

4.3.3.4.5 Remove Contact

Remove a contact by right clicking contact in the contact list and selecting Remove.

4.3.3.4.6 Chat with a Contact

Start a chat with a contact either by clicking the contact in the contact list or right clicking the contact in the contact list and selecting Start Chat. A new Web browser window will open as seen below.

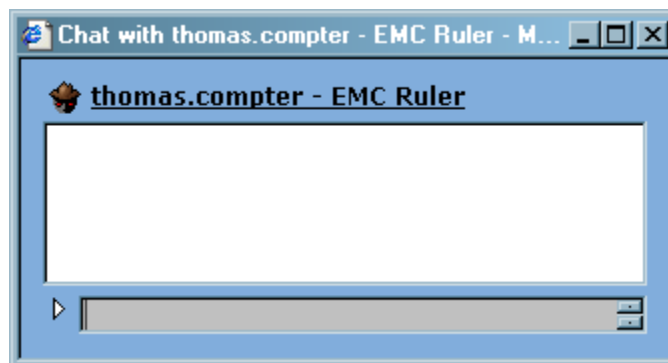


Figure 12 - Chat window

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The text field at the bottom is where the user can enter text to send to the contact. After entering text, the user presses the Enter key on the keyboard to send the text to the contact. The text sent will appear in the text area above the text field indicating the message was sent.

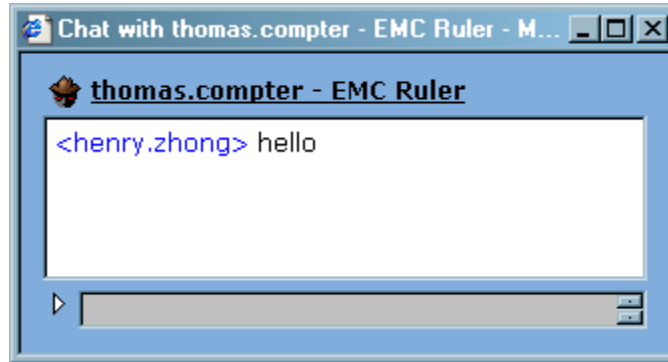


Figure 13 - Chat window showing sent message

The contact receiving the text will have a flashing icon next to the sending user's nickname in their Chat client contact list. The receiving user can click the flashing icon or the sending user's nickname to open a chat Web browser window with a display very similar to the display of the user sending the text.

Both users can add and send text to each other in the lower text fields of their windows and see each other's messages in the text area above. Each set of text is prefaced with the nickname of the user that sent the message.

Clicking the ► icon next to the text field at the bottom of the window will expand the text field to allow the user to see a larger area to enter text to send to the other user and a Send button which can be clicked to send the text.

The chat window can be closed at any time by either user. If a user sends text after the other user has already closed their chat window, the window will redisplay itself with the newly received text.

4.3.3.4.7 Send Message to Contact

A single message can be sent to a user on the contact list by right clicking the contact's nickname and selecting Send Message which displays an area where the user can provide a subject and message body.

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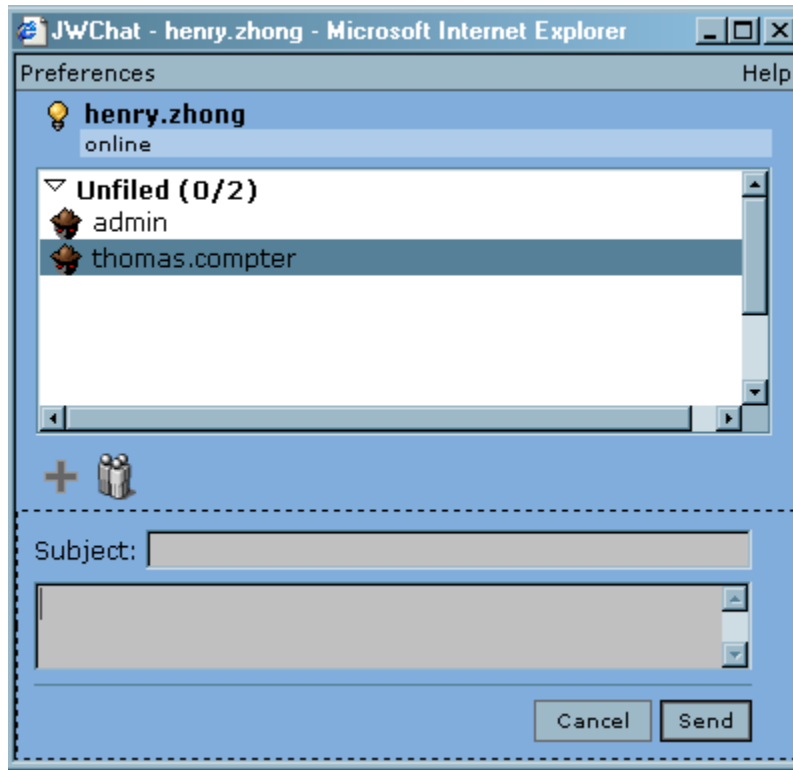


Figure 14 - Send message to contact

Once the user clicks the Send button, a new Web browser window will display the message on the recipient's screen. In addition to displaying the message subject and body typed by the sender, the window also displays buttons such as Start Chat, Reply, and Quote.

Clicking Start Chat will open a chat session between the two users just as if a chat had been started from the contact list.

Clicking Reply allows the recipient to send a message, again consisting of a subject and body, back to the original sender.

Clicking Quote behaves similarly to Reply, except the original message is included in the reply prefaced with the > character on each line.

4.3.3.5 Chat Room Functionality

Chat rooms can allow more than two users to participate in a conversation. Chat rooms can be temporary or persistent. Persistent chat rooms have the contents persist even when no users are in the chat room. When users join a persistent chat room they can see all the text that was exchanged in the chat room even if all the previous participants

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have left the room. Once all participants leave a temporary chat room, all the text that was exchanged is lost. Only the chat room's creator will know if the chat room is temporary or persistent.

4.3.3.5.1 Create Chat Room


Create a chat room by clicking the  icon which displays an area for the user to enter the room name and optionally a password and then clicks the Join button.



Figure 15 - Creating a chat room

If the Jabber server does not have a room with the supplied name, a new chat room will be created and added to the user's contact list under the Chat Rooms group. A new Web browser window will be displayed showing the chat room and a popup dialog will be displayed informing the user that a new room has been created but needs configuration. The user can click the OK button on the popup dialog to configure the room or click the Cancel button to accept the default configuration.

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4.3.3.5.2 Use Chat Room

After creating or joining a chat room, the user can use the Web browser window which was displayed for the chat room, as shown below.

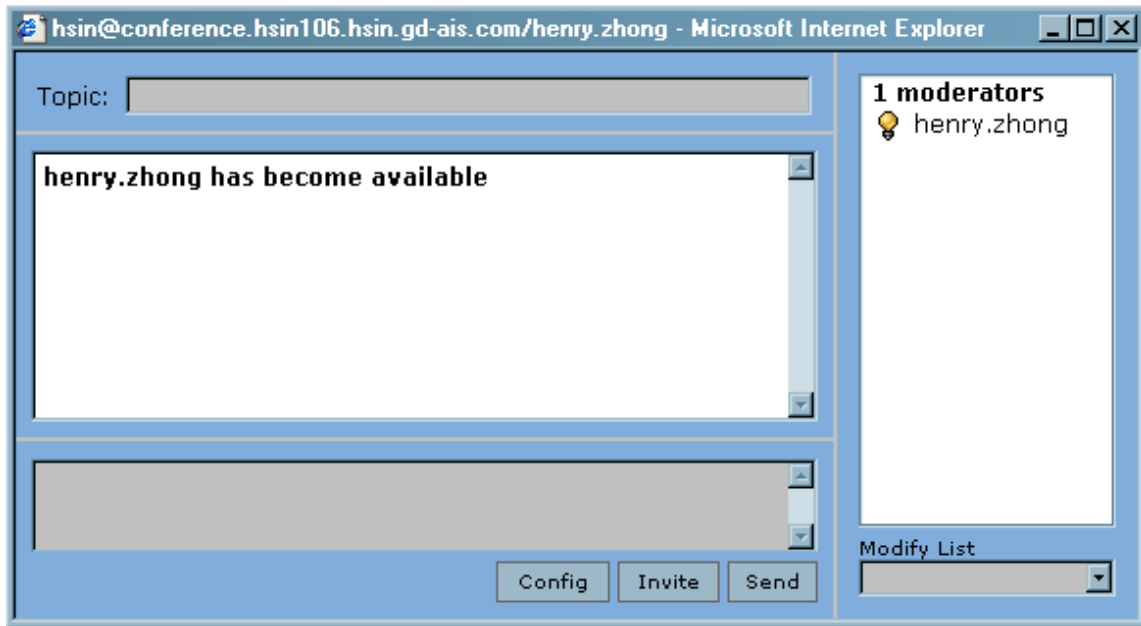


Figure 16 - Chat room

Text can be entered in the text area at the bottom of the window which will be sent to the room when the user presses the Enter key on the keyboard or clicks the Send button. The sent text will be displayed in the upper text area for all users in the room to see. The list of users currently in the room is displayed on the right side of the window along with their current status. The Config button and Modify List menu in the bottom right corner of the window are only displayed for chat room moderators.

4.3.3.5.3 Configure Chat Room

A chat room can be configured by the user whom created it. If the user is still participating in the chat room, they can configure it by clicking the Config button to display the properties will be displayed shown below. After setting the desired properties the user can click the OK button to save the changes or the Cancel button to discard the changes. The Destroy button in the properties dialog can be used to delete the chat room.

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Room title

Make room persistent

Make room public searchable

Make participants list public

Make room password protected

Password

Maximum Number of Occupants

Present real JIDs to

Make room members-only

Make room moderated

Default users as participants

Allow users to change subject


Allow users to send private messages

Allow users to query other users

Allow users to send invites

Destroy Cancel OK

Figure 17 - Chat room properties

To configure a chat room which the creator is no longer participating, click the  icon which displays an area for the user to enter the name of the room to configure and the password if applicable and then click the Join button. Once the chat room window is displayed, the user can click the Config button to display the properties window in which they can change the chat room's properties and clicking the OK button to save the changes.

4.3.3.5.4 Invite Users into Chat Room

Once a user has joined a chat room, the user can invite other users to join the room if permitted by the chat room's configuration by clicking the Invite button on the chat room window. An area will be displayed which allows the user to select one or more users from their contact list to send the invitation to. The selected users are highlighted. The user can also enter textual Reason which will be sent to the selected users as part of the invitation to enter the room. The invitation to join the chat room is sent when the user clicks the Invite button.

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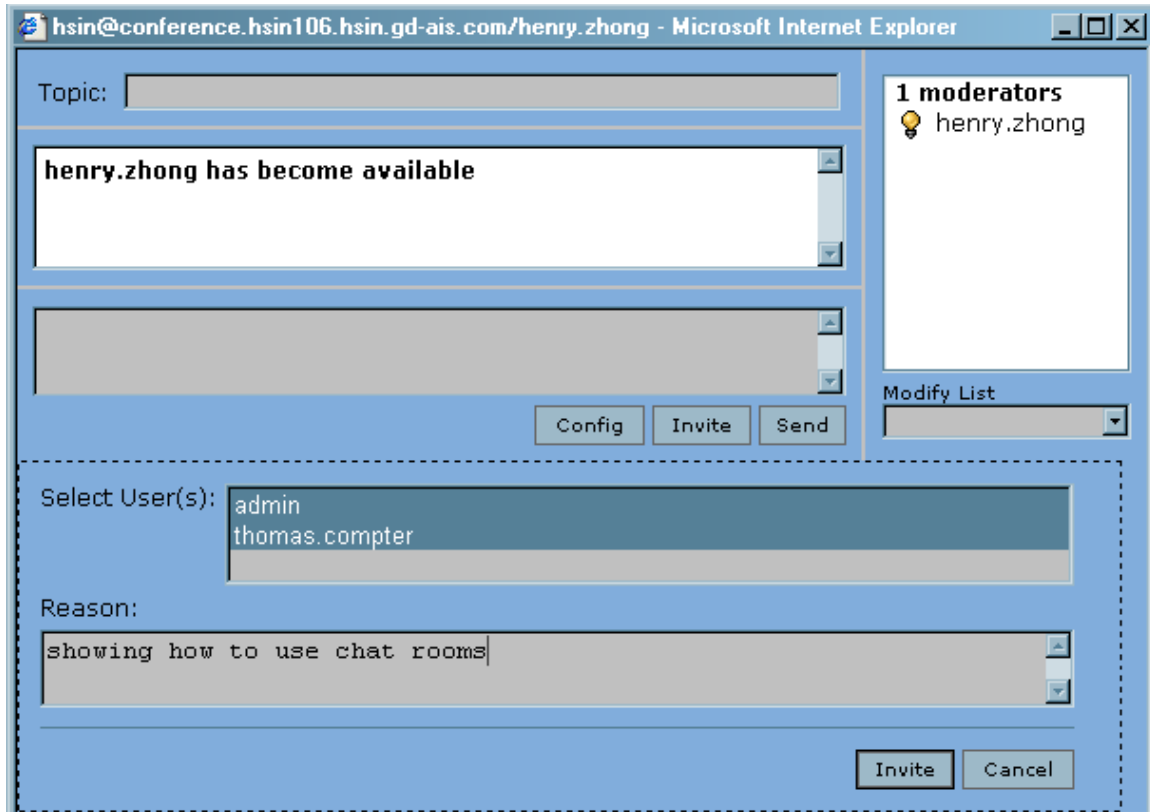



Figure 18 - Invite users to join chat room

4.3.3.5.5 Join Chat Room

Users join a chat room by accepting an invitation to join the chat room or by searching for the chat room to join.

Invitations to join a chat room are displayed in a new Web browser window. The invitation will display the name of the chat room, the ID of the user who sent the invitation, and optionally a Reason the inviting user specified. The invited user can accept the invitation by selecting Join or reject the invitation by selecting Decline and optionally entering text as to why they decided to decline the invitation. After selecting Join or Decline, the invited user clicks the Submit button in the invitation window. If the invitation was accepted, a new Web browser window will be displayed showing the chat room in which the user can participate.

The user can search for a chat room to join by clicking the  icon which displays an area for the user enters the room name and optionally a password and then clicks the Join button. If the Jabber server already has a room with the provided name and the password matches the password assigned to the room when it was created, the user will


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join the chat room and a new Web browser window will be displayed showing the chat room in which the user can participate.

The user can search for public chat rooms to join on a sever by clicking the  icon which displays an area in which the user can click the Open Search button next to the Search for Rooms label which displays an area in which the user to specify which Jabber server to search in the text field between the Search Server label and the Search button.

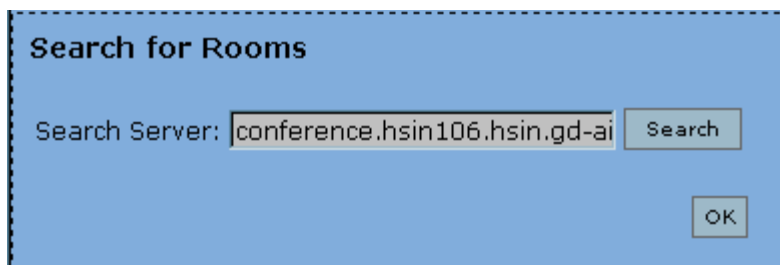


Figure 19 - Specify Jabber server to search for chat rooms

After entering the Jabber server information, the user clicks the Search button to perform the search. A list of rooms will be displayed as the search results. The user can Join a room by selecting it and the clicking the Join button.

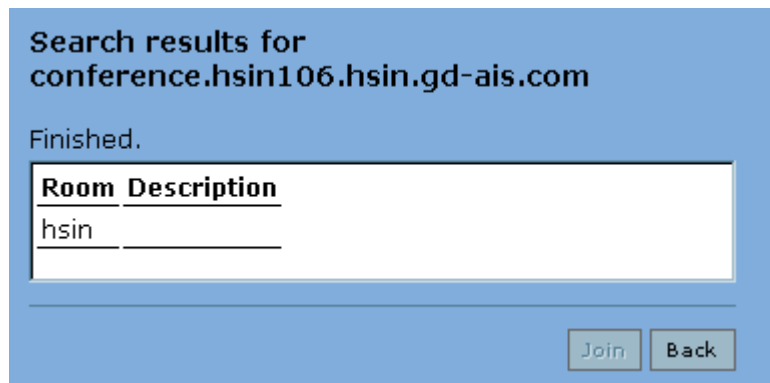


Figure 20 - Search for chat rooms results

4.3.3.5.6 Exit Chat Room

Exit a chat room by closing the Web browser window displaying the chat room.

4.3.3.5.7 Chat Privately with Chat Room Participants

If the chat room has been configured to display a list of participants to all users, individual users can initiate a private chat with another chat room participant by either

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clicking their nickname in the list of chat room participants or by right clicking their nickname and selecting Start Chat. A new Web browser window will be displayed to allow the two participants chat just as if they had initiated a chat from the contact list.

4.3.3.5.8 Delete Chat Room

Chat rooms that do not have the Mark room persistent property are automatically deleted when all participants leave the chat room by closing the Web browser window for the chat room.

Chat rooms can be destroyed at any time by their creator by joining the chat room and then clicking the Config button to display the properties window. The chat room's creator then clicks the Destroy button to permanently delete the chat room.

4.3.3.5.9 Chat Room Roles

Chat rooms have two roles for users in them: moderators and participants. By default the chat room creator is the sole moderator of a chat room and all users who join the chat room are participants. The moderator of the chat room can promote other users to the moderator role by adding them to the Moderator, Admin or Owner list by using the Modify List menu under the list of chat room participants.

Selecting the list from the Modify List menu displays a table of the users in the list and a text field labeled Nick to facilitate adding users to the list. To add a user to the list, type their nickname in the Nick text field and click the Add button. To remove a user from a list select the user in the list and then click the Delete button. After adding and removing the desired users, click the Save button to actually make the changes.

While adding a user to the Admin or Owner list promotes them to the moderator role, removing the user from the Admin or Owner list does not remove them from the Moderator list or role. To remove a user from the Moderator list, it is necessary to add them to the Members list. Adding a moderator to the Members list has the effect of demoting them to regular participant status.

4.3.3.5.10 Removing Users from Chat Room

A chat room moderator can temporarily remove users from the Chat rooms by removing them from the Voice list by using the Modify List menu under the list of chat room participants. Selecting the Voice list from the Modify List menu displays a table of the chat room participants. Removing a user from the Voice list temporarily removes them from the chat room. Remove a user from the table by selecting the user in the table and then click the Delete button. Click the Save button to actually make the changes.

4.3.3.5.11 Banning Users from Chat Room

A chat room moderator can ban users from a Chat room by adding them to the Ban list by using the Modify List menu under the list of chat room participants. Selecting the Ban

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list from the Modify List menu displays a table of the banned users and a text field labeled Nick to facilitate adding users to the list. To add a user to the list, type their nickname in the Nick text field and click the Add button. To remove a user from a list select the user in the table and then click the Delete button. After adding and removing the desired users, click the Save button to actually make the changes.

Banned users are removed from all lists other than the Ban list and are disconnected from the chat room. Banned users cannot reconnect to the chat room, even by invitation, until a moderator removes them from the Ban list.

Search

This section provides instructions on how to use the Search portlet to find content in the HSIN NextGen portal and Content Management System (CMS). The Search portlet provides users with both basic and advanced search capabilities across a broad range of informational sources with a single query. Searches performed by the user return a single, organized search results that can be grouped by ranking, information source, etc. The Search portlet allows users to save searches for repeated execution at a later time.

4.3.4.1 Overview

The Search portlet allows for basic search through a simple interface while also providing the capability to use advanced search features such as: Boolean query operators (AND, OR, NEAR, CONTAINS, etc.), case sensitivity, case insensitivity, wild character support, and support for phrases ("").

4.3.4.2 Setup

Administrators specify which sources the Search portlet can perform searches on.

4.3.4.3 Procedure

Users access the Search portlet from the right side any HSIN NextGen web page.

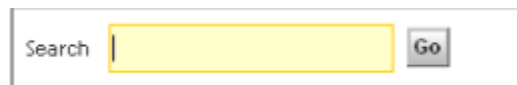


Figure 21 - Search portlet

4.3.4.4 Functionality

The user can perform a basic search by entering a search term in the text field between the Search label and the Go button. The user clicks the Go button to perform the basic search. The Search portlet displays a count and list of the results of the search ordered by most relevant to least relevant. The user can change the ordering of the results by clicking one of the Sort by criteria displayed at the top of the results list.

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Search Results
Results for "homeland" in HSIN_QA, Google-English, websynergy

98 Total | Edit Search | Save

Page 1 of 5 | Items per page: 10

Sort by: Name | Title | Mission Area | Document Type | COI Name | Status | Retention Date | Ranking | Source | Format | Size | Modified | Lock Owner | Summary | Discussion Status | Room

Department of Homeland Security | Preserving our... 72% ⓘ Save to Repository Actions

Source: Google-English

Summary: Official organization home. Includes news on latest threats, advisories, planning tips, and job opportunities.

US Department of Homeland Security 71% ⓘ Save to Repository Actions

Source: Google-English

Summary: Governmental agency works to prevent terrorist attacks within the United States, reduce America's vulnerability to terrorism, and minimize the damage from ...

Figure 22 - Search results

The following information is displayed for each search result (if applicable):

- Name – the name of the object.
- Size – the size of the object.
- Version – the version of the object.
- Modified – the date the object was last modified.
- Path – the path to the object.
- Summary – a brief summary of the object.

The user can click the property icon ⓘ to view the properties of the search result. The following are the properties displayed: Format, source, size, site, name, summary, full content size, cached-URL, related-URL, and URL. Click Close to close the properties page.

The user can click the name of the search result to view the item.

The user can click Edit Search to update the parameters to conduct an advanced search.

When the user has finished with the search results, they can save the search for later use by clicking the Save link or click the Close button at the bottom of the search results.

4.3.4.4.1 Advanced Search

Advanced Search lets the user adjust various parameters such as locations, properties, date, size, object properties, and versions as described below. An advanced search is initiated from the search results of a basic search by clicking the Edit Search link and then updating the search parameters on the General tab.

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Advanced Search:

The screenshot shows the 'Advanced Search' interface with the following fields and options:

- General** (selected), My Saved Searches, All Saved Searches
- Contains:** homeland
- Locations:** H SIN_QA; Google-English; websynergy [Edit](#)
 Current location only: H SIN_QA
- Object Type:** Document (hsin_document)
- Properties:** Name | contains | [Remove](#)
[Add another property](#)
- Date:** Modified | Anytime
 From To
- Size:** Any Size
- Additional:** Find hidden objects
 Find all versions
 Include recently modified properties or properties containing a word fragment
- Buttons: **Search**, **Clear**, **Cancel**

Figure 23 - Advanced Search page

The Contains field is populated with the search term from the basic search. The user can update this value to search for a different term.

The Locations selection specifies where to search for results. The user can click the Edit link to change the locations. This allows the user to set search locations to multiple repositories, sub-directories, and multiple external locations. After clicking the Edit link, the user can select folders from repositories in the Available Repositories list by clicking on the + sign to expand the repositories. The user can then browse the repository's folder structure to find the desired folder to search. The user selects the folder and clicks the > button to include the folder in the search. Items in the Included in Search list can be removed by selecting them and clicking the < button. External sources are selected from this page in a similar manner. Once both Included in Search lists are set to the desired values, click the OK button.

The user can specify the desired Object Type to limit the result set to.

Properties can also be used as search criteria. For the first property to search, in the Name field in the Properties area, select the property to search for from the dropdown list. In the second field, select an operator, which determines the relationship to the search value. For example, to find all files written by John Brown, specify the Authors property is "John Brown", or contains "Brown", or starts with "John". Enter search values in the next field.

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For each subsequent set of property values you want to search for, perform the following:

- Click Add another property. This adds another line for specifying property values.
- In the first field in the new line, select the relationship between this property, and the preceding properties specified in the search. Select one of the following:
 - AND: This indicates the search must match both the values for this property, and the values for the preceding properties.
 - OR: This indicates the search must match either the values for this property or the values for the preceding properties.
- In the Name field, select the name of the property to search for.
- In the next field, select an operator, which determines the relationship to the search value. For example, to find all files written by John Brown, the user could specify the Authors property is “John Brown”, or contains “Brown”, or starts with “John”. Enter the search values in the next field.

To remove a property from the search, click on the Remove on the line item for that property.

To search by date when a file or folder was created or modified, use the Date dropdown list to select one of the following: Accessed, Checkout Date, Created, Effective Date, Expiration Date, Last Review Date, Modified, or Retain Content Until. Select an option from the list to specify when the file or folder was last accessed, modified or created. By default, the date range is Anytime. Choose the appropriate date range from the dropdown list which lists Within the previous day, Within the previous week, Within the previous month or Within the previous year. To set the date range, click the radio button, and select from date, and to date by clicking on the icon beside it. When the search is saved, the data range gets saved.

To search by file size, select the search criteria from the dropdown list.

The Additional section lets the user find hidden objects or all versions. To find hidden objects, select Find hidden objects. Hidden objects are only visible to users with Read or Write permissions for the object. The search displays only the objects the user has permission to view. To find all versions of a file, select Find all versions.

After specifying all the search parameters, the user clicks the Search button to perform the search. Results will be displayed in the same format as the Basic search.

4.3.4.4.2 Saved Searches

Searches can be saved and rerun with the same parameters to return updated results. To save a search, click Save Search from the search results display. Enter a name and description for the search and click OK.

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Save Your Search:

Name: *

Description: homeland

Include Results

Make Public

OK Cancel

Figure 24 - Save Search

To run a saved search, click Edit Search and then select the My Saved Searches tab or the All Saved Searches tab. My Saved Searches lists all the saved searches which the user has saved with Description, and Modified date and time details. All Saved Searches lists all the searches made by different users. It lists owners, Description, and Modified date and time details of the search. Click Search to display the search results, Edit to edit the search, or Remove to delete the search. When deleting a search, the user selects the version(s) to delete and clicks OK.

Advanced Search:

General My Saved Searches All Saved Searches

Repository: HSIN_QA

Items per page: 10

Name ▲	Description	Modified	
search1	homeland	5/29/09 10:01 PM	Edit Remove Search

Close

Figure 25 - Saved Searches

4.4 Bookmarks

This section provides instructions on how to use the Bookmarks portlet within the user's private web pages as well as within the COI's Bookmarks page. The Bookmarks portlet organizes a collection of bookmarks to web pages in a folder hierarchy and provides a keyword search function for users to find bookmarks.

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Within the user's private pages, the user can use the Bookmarks portlet to:

- Browse bookmark folders
- View bookmarks
- Search for bookmarks
- Add, edit, and delete bookmarks and folders of bookmarks
- Merge bookmark folders

Within a COI, only users with either the Admin or Contributor roles can add, edit, and delete bookmarks and folders of bookmarks and merge bookmarks in the Bookmarks portlet.

Overview

The Bookmarks portlet can be found on the COI Bookmarks pages and on the individual user's My Home Bookmarks sub tab page. Each instance of the Bookmark portlet has its own set of bookmarks which are made available to users.

Setup

The Bookmarks portlet is installed by default on each user's My Home Bookmarks page and each COI's Bookmarks page. No special setup is required. Users who should be allowed to add bookmarks and folders to the COI Bookmark portlet should be members of either the COI Admin or COI Contributor roles.

Procedure

Use the Bookmarks portlet by navigating to a COI's Bookmarks page or the user's My Home and click on the Bookmarks sub tab. The Folders tab of the Bookmarks portlet is selected by default. A search text area will be displayed with a search button. An Add Folders button will be visible if the user has permissions to add a folder.

Any top level folders that have already been created will be displayed along with a count of the number of folders and bookmark entries they each contain.

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The screenshot displays the 'Bookmarks' portlet interface. At the top, there is a 'Bookmarks' header with a small icon. Below this, there are three navigation tabs: 'Folders' (selected), 'My Entries', and 'Recent Entries'. A search bar is located below the tabs, with a 'Search Entries' button to its right. The main content area features a table with the following data:

Folder	# of Folders	# of Entries
Folder1 Test Folder	0	2
Folder2 Subfolders: Subfolder	1	2

Below the table, it says 'Showing 2 results.'

Figure 26 - Bookmark portlet

Functionality

All COI users have the ability to browse and view the bookmarks contained in the Bookmark portlet contained in the COI's Bookmarks page. Users belonging to the COI Admin or COI Contributor roles can add, edit, and delete both bookmarks and the folders which contain them in the Bookmark portlet placed on their COI's Bookmarks page. Individual users have full control over the content of the Bookmarks portlet contained within their own My Home Bookmarks page.

4.4.4.1 Navigate Folders

Clicking a folder's name displays its contents which can be bookmarks as well as sub folders.

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The screenshot displays the 'Bookmarks' application interface. At the top, there is a 'Bookmarks' header with a 'Return to Full Page' link. Below this, there are three tabs: 'Folders', 'My Entries', and 'Recent Entries'. The 'Folders' tab is active, showing a 'Folder2' view. A search bar is present with a 'Search Entries' button and an 'Add Subfolder' button. Below the search bar is a table with columns 'Folder', '# of Folders', and '# of Entries'. The table contains one row for 'Subfolder' with 0 subfolders and 1 entry. Below the table, it says 'Showing 1 result.' There is another 'Entries' tab below the 'Folders' tab. This tab is active, showing a search bar, a 'Search Entries' button, and an 'Add Entry' button. Below this is another table with columns 'Entry', 'URL', 'Visits', 'Priority', and 'Modified Date'. The table contains one row for 'GM' with URL 'http://www.gm.com', 1 visit, priority 0, and modified date '5/4/09'. Below this table, it says 'Showing 1 result.'

Figure 27 - Displaying the contents of a folder

4.4.4.2 View Bookmark

When displaying the contents of a folder that contains one or more bookmarks, the bookmarks will be listed on the Entries sub tab. Clicking any part of the entry opens the associated bookmarked location in a new Web browser window.

4.4.4.3 Search for Bookmarks

To perform a search for bookmarks, the user enters a search term in the Search text field which is displayed on the initial Folders page as well as on each page displaying a folder (or subfolder) contents. If a search is performed on the initial Folders page, all bookmarks will be searched. Searches performed on a subfolder page will restrict the scope of the search to the current folder and all of its subfolders.

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The search terms can match tags, bookmark name, or words in the bookmark's description. After entering a search term and clicking the Search Entries button, a list of brief summary bookmarks matching the search term are displayed. A score is assigned to each search result based on the result's relevance to the search terms. The user can click on the result to display the bookmarked location in a new Web browser window.

Bookmarks [Return to Full Page](#)

Search [« Back](#)

motor [Search File Entries](#)

#	Folder	Entry	Score
1.	Subfolder	Toyota	★★★★★
2.	Folder1	Ford	★★★★★ Actions

Showing 2 results.

Figure 28 - Bookmark Search Results

4.4.4.4 Add Folder

The Add Folder or Add Subfolder buttons will be displayed within a folder's contents page if the user has permission to add a sub folder. Clicking the Add Folder button will display a page for the user to enter a name and description for the folder. Additionally, the user can configure permissions for the new folder.

Folder [« Back](#)

Name

Description

Permissions [Configure »](#)

Figure 29 - Add Folder


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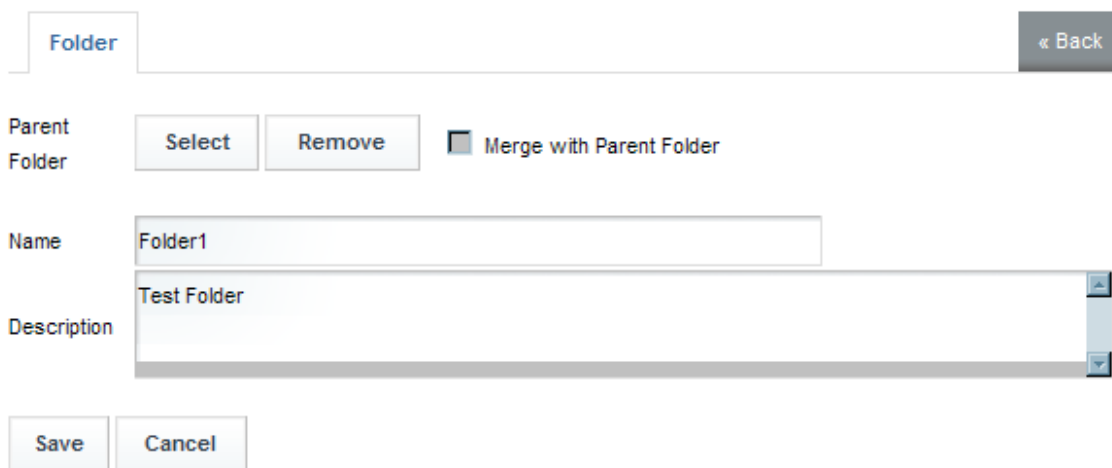
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4.4.4.5 Edit Folder

If the user has permission to edit a folder's properties, either the Actions button or Edit icon  will be displayed to the right of the folder's entry in the list of folders currently being displayed. Clicking the Edit icon or selecting the Edit item from the Actions menu will display a page which the user can edit the folder's information on. The user can change the name or description of the folder by updating the text displayed to the right of the Name and Description labels.



The screenshot shows a web form for editing a folder. At the top, there is a breadcrumb 'Folder' and a 'Back' button. Below this, the 'Parent Folder' section includes 'Select', 'Remove', and a 'Merge with Parent Folder' checkbox. The 'Name' field is a text input containing 'Folder1'. The 'Description' field is a text area containing 'Test Folder'. At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 30 - Edit Folder

The user can also change the parent folder by clicking the Select button to the right of the Parent Folder label. A popup dialog will be displayed listing the folders for the user to select as the new parent folder of the folder being edited. If the desired new parent folder is displayed the user clicks the Choose button to the right of it. If the folder the user desires to select is not displayed, it might be a sub folder of one of the folders being displayed. In that case the user must navigate the folder structure in the popup dialog until the desired parent folder is displayed at which point the Choose button to its right should be clicked. Clicking the Choose button closes the popup dialog and displays the name of the selected folder between the Parent Folder label and Select button. If the user changes their mind about the selection, the Remove button can be clicked to remove the new parent folder selection.

After the user has made the desired changes to the folder they click the Save button to update the folder. The Cancel button aborts the changes to the folder.

4.4.4.6 Merge Folder

To move the contents of a folder into the parent folder, enter the edit the folder page as described above and select the Merge with Parent Folder checkbox. Selecting this

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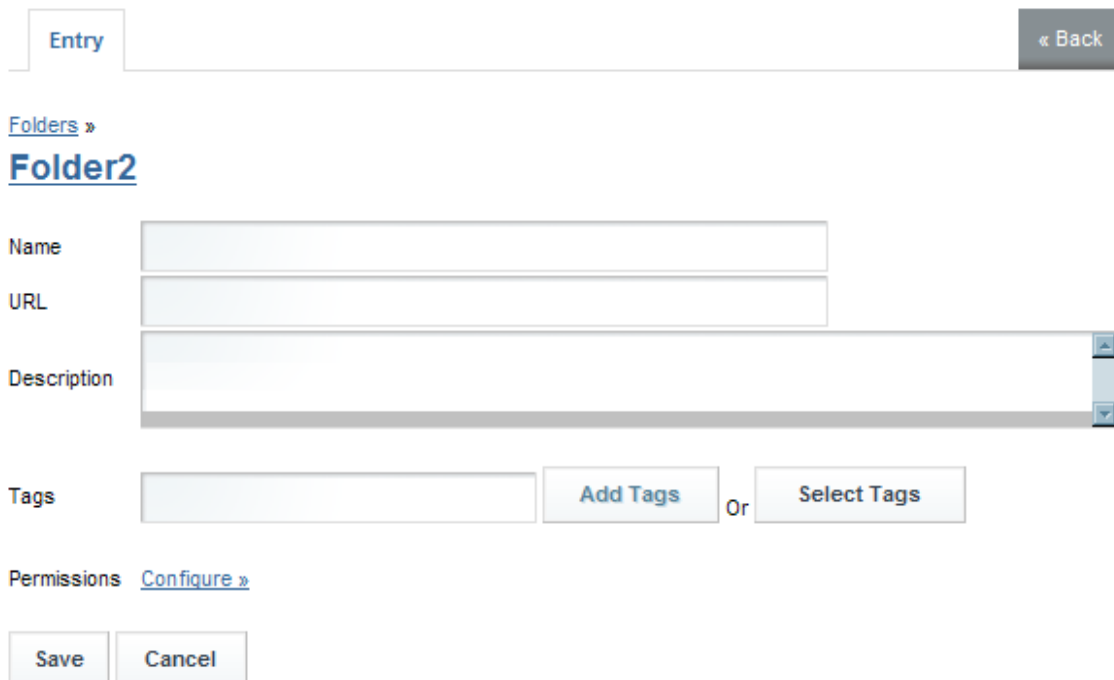
checkbox and then clicking the Save button will move the contents of the current folder to the parent folder and deletes the current folder.

4.4.4.7 Delete Folder

If the user has permission to delete a folder, either the Actions button or Delete icon  will be displayed to the right of the folder's entry in the list of folders currently being displayed. Clicking the Delete icon or selecting the Delete item from the Actions menu will prompt the user to confirm deletion of the folder. Clicking OK will delete the folder and its contents.

4.4.4.8 Add Bookmark

The Add Entry button will be displayed within a folder's contents page if the user has permission to add a bookmark entry in the folder. Clicking the Add Entry button will display a page for the user to enter a name, URL, description as well as tags for the bookmark. Assigning tags to a bookmark makes it easier to find in searches. Additionally, the user can configure COI members as well as guest users' permissions for the new bookmark. Default bookmark permissions allow COI members and guest users to view the bookmark.



Entry « Back

Folders »

Folder2

Name

URL

Description

Tags Add Tags Or Select Tags

Permissions [Configure »](#)


Save Cancel

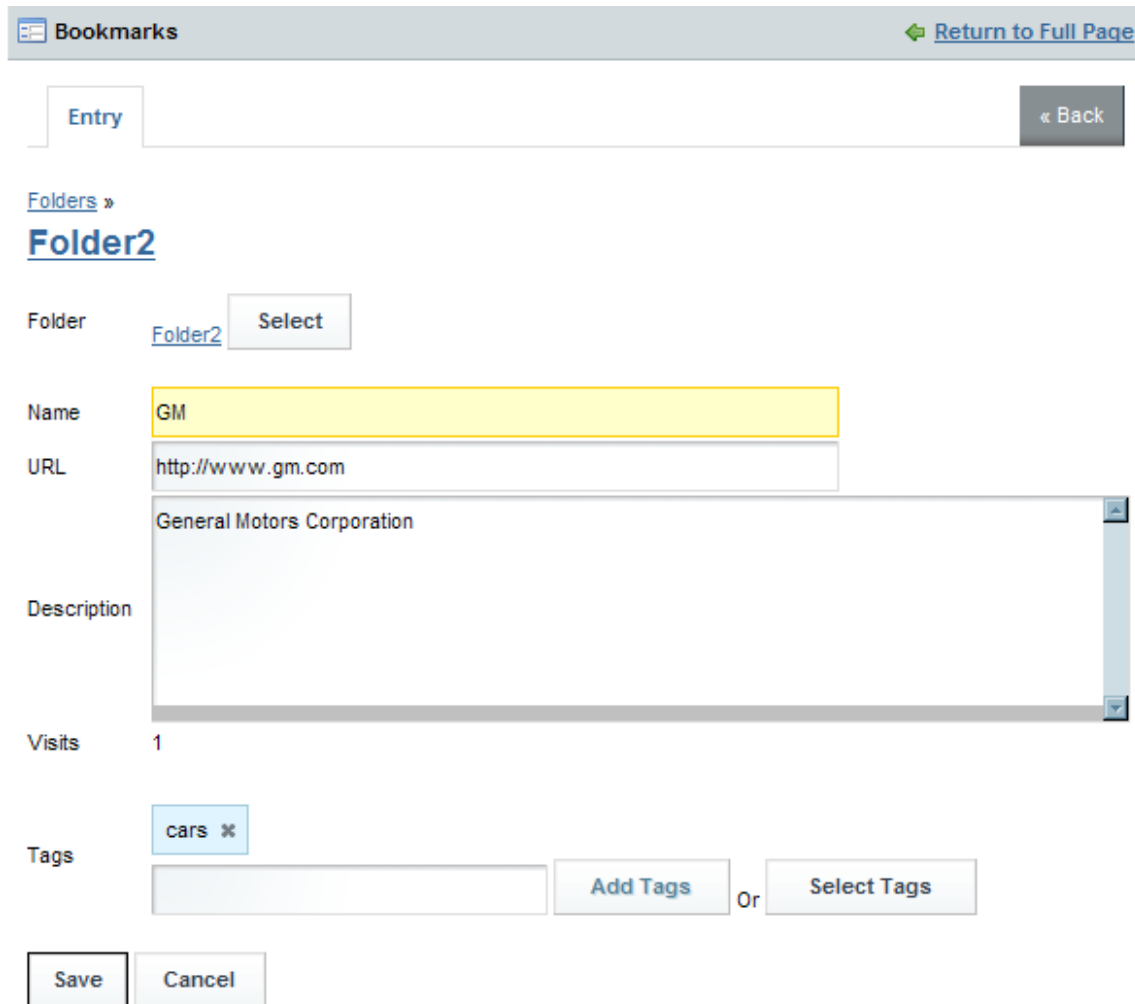
Figure 31 - Add Bookmark

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4.4.4.9 Edit Bookmark

If the user has permission to edit a bookmark, either the Actions button or Edit icon  will be displayed to the right of the bookmark's entry in the list of bookmark entries currently being displayed. Clicking the Edit icon or selecting the Edit item from the Actions menu will display a page which the user can edit the bookmark information on. The user can change the name, URL, description and tags of the bookmark.



The screenshot shows a web interface for editing a bookmark. At the top, there is a header with 'Bookmarks' and a 'Return to Full Page' link. Below this is a breadcrumb trail with 'Entry' and a 'Back' button. The main content area is titled 'Folder2'. Underneath, there are several fields: 'Folder' with a 'Select' button, 'Name' with the value 'GM', 'URL' with 'http://www.gm.com', 'Description' with 'General Motors Corporation', and 'Visits' with the value '1'. There is also a 'Tags' section with a tag 'cars' and buttons for 'Add Tags' and 'Select Tags'. At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 32 - Edit Bookmark

The user can also change the containing folder by clicking the Select button to the right of the Folder label. A popup dialog will be displayed listing the folders for the user to select as the new folder of the bookmark being edited. If the desired new folder is displayed the user clicks the Choose button to the right of it. If the folder the user

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desires to select is not displayed, it might be a sub folder of one of the folders being displayed. In that case the user must navigate the folder structure in the popup dialog until the desired folder is displayed at which point the Choose button to its right should be clicked. Clicking the Choose button closes the popup dialog and updates the name of the selected folder between the Folder label and Select button.

After the user has made the desired changes to the bookmark they click the Save button to update the bookmark. The Cancel button aborts the changes to the bookmark.

4.4.4.10 Delete Bookmark

If the user has permission to delete a bookmark, either the Actions button or Delete icon  will be displayed to the right of the bookmark entry in the list of bookmarks currently being displayed. Clicking the Delete icon or selecting the Delete item from the Actions menu will prompt the user to confirm deletion of the bookmark. Clicking OK will delete the bookmark.

4.4.4.11 My Entries

Clicking on the My Entries tab displays the bookmarks created by the user. Users always have permission to edit and delete bookmarks they created.

4.4.4.12 Recent Entries

Clicking on the Recent Entries tab displays the bookmarks created recently.

4.5 Calendar

This section provides instructions on how to use the Calendar portlet within the user's private web pages as well as on a COI's Welcome page. The Calendar portlet can be utilized within a COI to maintain and communicate the schedule of COI events.

Within the user's private pages, the user can use the Calendar portlet to:

- view events for the day, week, month, and year
- view a list of all events
- add, edit, delete events
- import and export events

Within a COI, only users with either the Admin or Contributor roles can add, edit, delete and import events or export all events.

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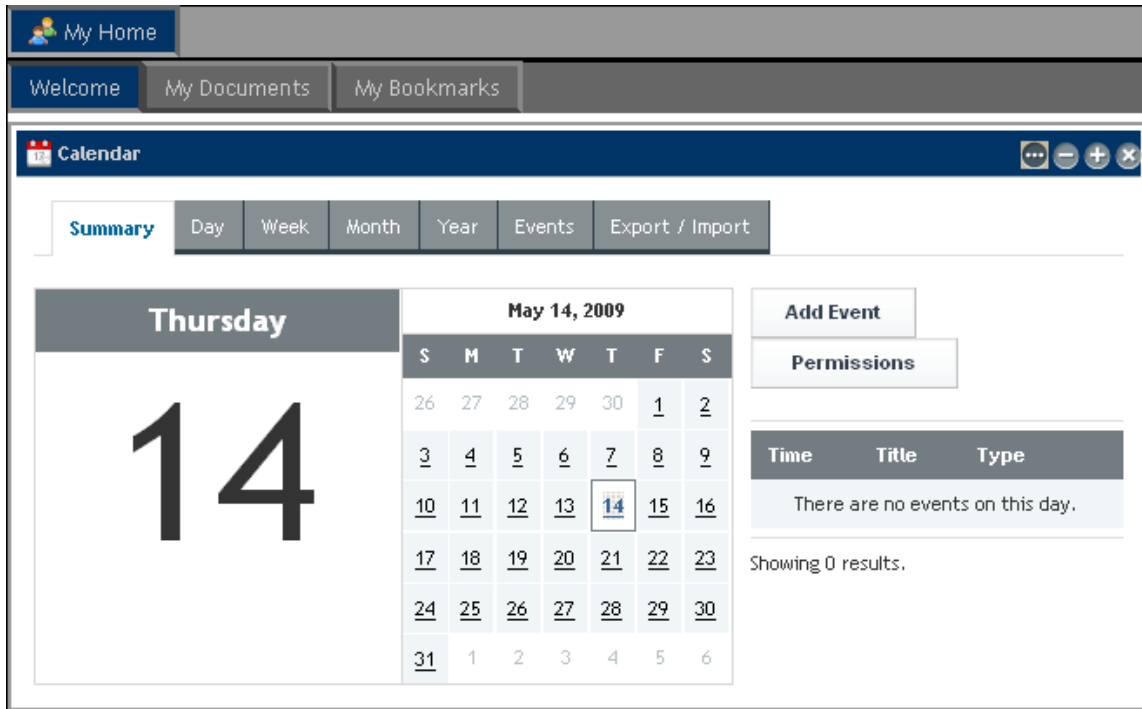


Figure 33 - Calendar portlet displayed on Welcome page of each user's My Home

Overview

A user can see a summary of events in the Calendar portlet. The portlet offers multiple views for the user to see events. Users who have permissions to add events can add onetime and recurring events to the calendar. Users who have permission to Export All Events can export the events to a file for import to an external calendar application such as Microsoft Outlook. Users have all permissions to their "My Home" Calendar.

Setup

The Calendar portlet is installed by default on each user's My Home Welcome page and each COI's Welcome page. No special setup is required. Users who should be allowed to add events to the COI Calendar portlet should be members of either the Admin or Contributor roles.

Procedure

Navigate to a COI that the user is a member of or to the user's private "My Home" web pages. Click the Welcome sub tab to display the Calendar portlet. The initial view of the Calendar portlet shows today's date, a small image of the current month and a list of events for the day. If the user has Add Event permissions, a button labeled Add Event is displayed above the list of the day's events.

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Functionality

The small image of the month highlights the current date and shows a small dot image below days of the month that have events scheduled on them. The user can click on any of the days of month displayed on the calendar to switch to the detailed view for the date selected.

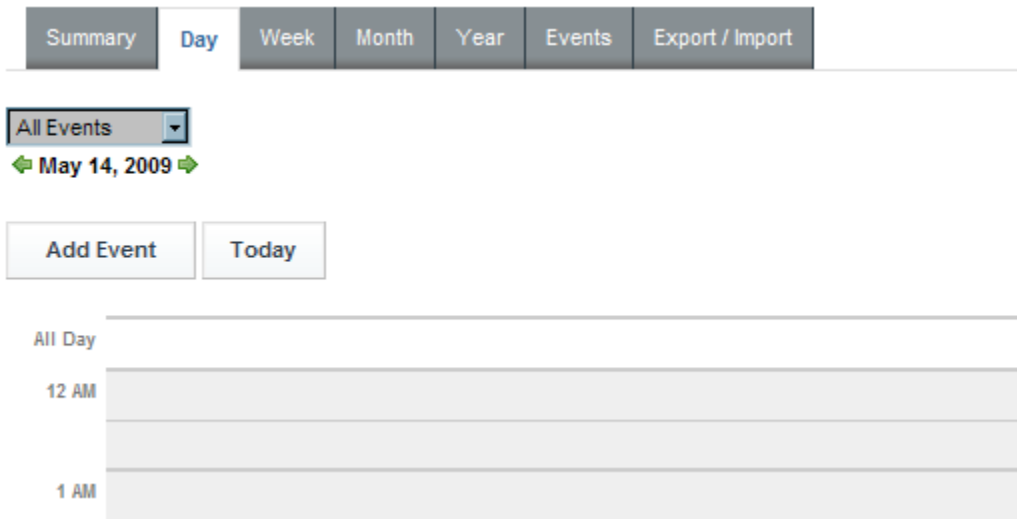


Figure 34 - Calendar Day view

The user can click on an item in the list of events for the day to see the detailed view of the event. Depending on the user's roles and permissions, an Actions button might appear to the right of items in the list of events. Clicking on the Actions button can give the user event choices such as Edit, Export, Permissions, and Delete depending on the user's roles and permissions.

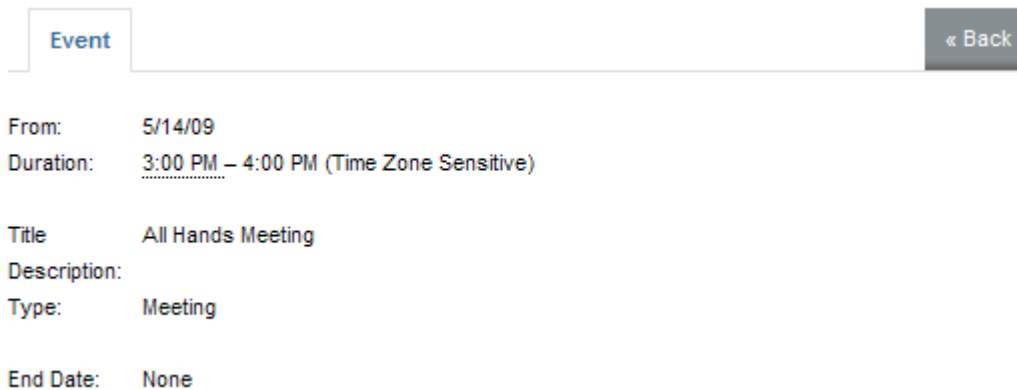


Figure 35 - Calendar Event Detail view

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4.5.4.1 Day, Week, Month, Year and Events Views

As mentioned above, selecting a day of the month in the small image of the month is one way to see the detailed view for a date. Another way to see the detailed view for a date is to click the Day tab within the Calendar portlet. The day detailed view shows all events for the day as a box covering the time for the event. Events with duration of “all day” are displayed at the top of the display. Each box will display the title of the event and the start and end time of the event if one is specified. Clicking the title of an event will display the event details. An edit icon will be displayed within the event box if the user has permission to edit the event.

A combo box at the upper left of the day detailed view enables the user to filter the displayed events based on their type. The day being displayed within the day detailed view can be changed using the previous and next arrow controls at the top left of the day detail display. Clicking the “Today” button returns the day detail display to the current date. If the user has the Add Event permission an Add Event button will be displayed.

Selecting the Week tab within the Calendar portlet shows all events for the week. Controls are similar to the day detail view except that it is not possible to edit events from the week view. If the user has the Add Event permission, in addition to the Add Event button being displayed a small add icon will be displayed in the top right corner of each day that the user can click to add a new event to the day. Clicking the day of the week (Sunday, Monday, etc.) or the date will display the day detail view for the day selected.

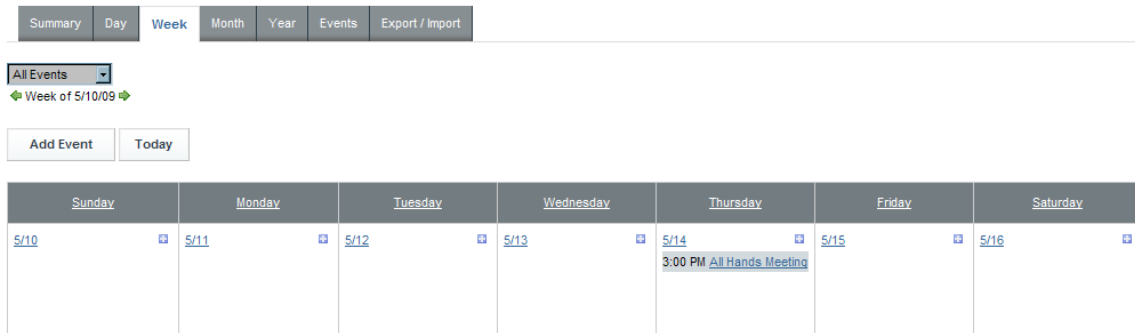


Figure 36 - Calendar Week view

Selecting the Month tab within the Calendar portlet shows all events for the month. Controls are similar to the week detail view. Clicking a day’s date will display the day detail view for the day selected.

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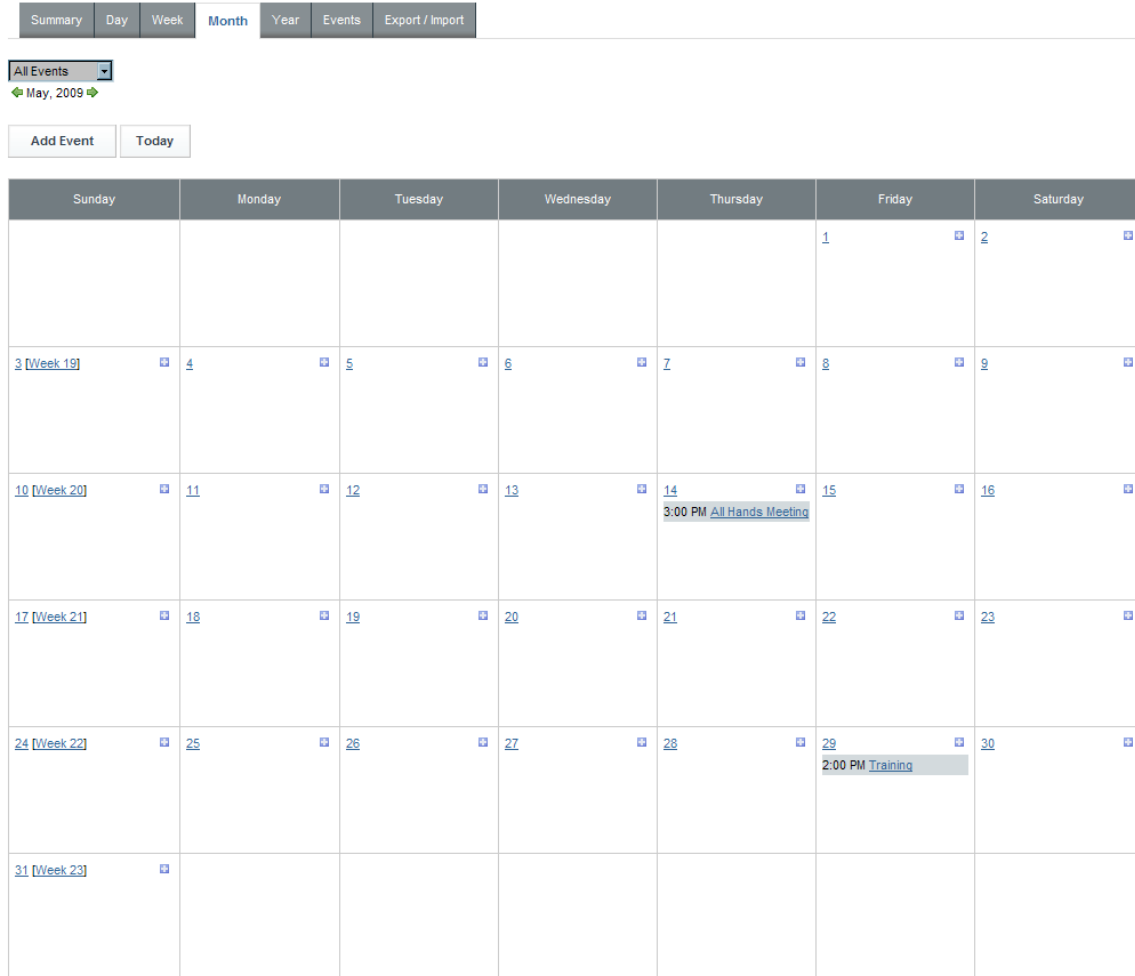


Figure 37 - Calendar Month view

Selecting the Year tab within the Calendar portlet shows a small calendar image for each month of the year. Days with events on them will have a small dot icon below them. Controls are similar to the week detail view.

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Summary
Day
Week
Month
Year
Events
Export / Import

←

2009

→

All Events

January						
S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

February						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
1	2	3	4	5	6	7

March						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

April						
S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

May						
S	M	T	W	T	F	S
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

June						
S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

July						
S	M	T	W	T	F	S

August						
S	M	T	W	T	F	S

September						
S	M	T	W	T	F	S

Figure 38 - Calendar Year view

Selecting the Events tab within the Calendar portlet shows a list of events similar to the list of daily events shown in the initial Summary tab view, but all events are displayed, not just the ones for the current day.

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Date	Time	Title	Type	Actions
5/14/09	3:00 PM – 4:00 PM	All Hands Meeting	Meeting	
5/29/09	2:00 PM – 3:00 PM	Training	Training	

Showing 2 results.

Figure 39 - Calendar Events view

4.5.4.2 Add Event

If the user has the permission to add events to the calendar, adding an event can be done by clicking the Add Event button on any of the Calendar portlet tabs except Year and Export / Import. After clicking the Add Event button, the Add Event page is displayed on which the user can specify the date and time the event begins and the duration of the event. The user should specify a meaningful event title and description. Selecting an event Type helps users find specific types of events in the Calendar portlet.

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[Events »](#)

Add Event

Start Date

Duration Hours Minutes

All Day

Event

Time Zone

Sensitive

Title

Description

Type

Permissions [Configure »](#)

- Never Do not repeat this event.
- Daily
- Weekly
- Monthly
- Yearly

End Date No end date

End by

Remind me before, and again before the event by:

- Do not send a reminder
- Email Address (admin@example.com)
- SMS
- AIM
- ICQ
- MSN
- YM

Figure 40 - Add Event page

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When adding an event, the event creator can set permissions on the event to specify who can view, edit, delete and set permissions on the event by clicking the Configure link next to the Permissions label.

By default the new event is a onetime event, but it can be changed to be a reoccurring event by selecting the recurrence interval under the Repeat sub tab of the Add Event page. An event can reoccur daily, weekly, monthly or yearly either indefinitely (no end date) or to end on a specific date.

Click the Save button on the Add Event page after entering the event information and optionally setting permissions for the event.

By default, users are granted permissions to edit and delete events they create.

4.5.4.3 Edit Event

If the user belongs to a role with permissions to edit an event, editing an event is done by selecting Edit from the Actions button to the right of the event on the Summary or Events tab or by clicking the edit icon on the Day tab. The Update Event page is exactly the same as the Add Event page except that the user cannot specify the Permissions of the event. Click the Save button on the Update Event page after modifying the desired event information.

4.5.4.4 Change Event Permissions

If the user belongs to a role with permissions to modify the permissions of an event, changing permissions for an event is done by selecting Permissions from the Actions button to the right of the event on the Summary or Events tab. Select the permissions to give to or deselect permissions to remove from the specified roles. Click the Submit button to save the updated permissions for the event.

4.5.4.5 Delete Event

If the user belongs to a role with permissions to delete an event, deleting an event is done by selecting Delete from the Actions button to the right of the event on the Summary or Events tab. The user must confirm the deletion for the event to be removed from the calendar.

4.5.4.6 Export Event

Exporting an event is done by selecting Export from the Actions button to the right of the event on the Summary or Events tab. After selecting Export, the Web Browser will prompt the user to Save or Open the iCalendar File containing the event information. This file can be imported into an external calendar program such as Microsoft Outlook.

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4.5.4.7 Export All Events

If the user belongs to a role with permissions to export all events, exporting all events is done from the Export / Import tab. Under the Export / Import tab there is an Export sub tab with a text field for specifying the name of the file to export the events to. After entering a name, click the Export button which will cause the Web Browser to prompt the user to Save or Open the iCalendar File containing the events information. This file can be imported into an external calendar program such as Microsoft Outlook.

4.5.4.8 Import Events

If the user belongs to a role with permissions to import events, importing an iCalendar file containing one or more events is done from the Export / Import tab. Under the Export / Import tab there is an Import sub tab with a text field for specifying the file to import events from. The user can specify the file location or click the Browse button to locate the file. After specifying the file, click the Import button which will cause the event(s) contained in the file to be imported to the calendar.

4.6 Document Access

The HSIN NextGen system provides a Content Management System (CMS) capable of managing all types of content across the enterprise within a common information infrastructure. Information stored in CMS repository is accessed by multiple portlets.

The HSIN NextGen system Welcome page provides access to the Cabinets portlet. Each user's private My Documents page provides access to the Home Cabinet and Subscriptions portlets. Users can optionally add the Inbox portlet to their private pages to process CMS workflow tasks. Each COI has a Document Library and Image Library page which provides access to the powerful Webtop application.

The highest level of file storage in the Content Management System (CMS) repository is the repository's cabinets. Each cabinet contains folders and files. Folders can contain sub folders and / or files.

Each COI has a cabinet and folder structure defined for it based on its defined structure. There will be a cabinet for each Mission Area under which folders will be created for each COI. Sub-COI's will have folders created for them under their parent COI folder. COI CMS administrators can add "ad-hoc" folders below the lowest level COI folder.

Each user will have a folder under a Users cabinet. The user is free to create any hierarchy of folders and subfolders under their personal folder in the Users cabinet. There is no limit to how many levels of sub folders can be created.

Cabinets and Home Cabinet

This section provides instructions on how to use the Cabinets and Home Cabinet portlets to access CMS content. These portlets can be used to:

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- view, create, rename, set permissions, and delete folders and files
- import and export folders and files
- check out a file for modification
- check in a new version of a file
- copy, move and link files and folders

Additionally, the Cabinets portlet can be used to create cabinets.

4.6.1.1 Overview

Files stored within the CMS repository are modified by first checking them out, modifying them with an application, and then checking them back in. Functionality provided by the Cabinets and Home Cabinet portlets to manipulate the cabinets, folders, and files of the CMS repository is identical except that the Home Cabinet does not provide the ability to create cabinets.

4.6.1.2 Setup

Cabinets and folders should be created in the CMS repository for the COIs and Sub-COIs and users given the appropriate permissions to them.

4.6.1.3 Procedure

The Cabinets portlet can be found on the Welcome page of the HSIN NextGen system.

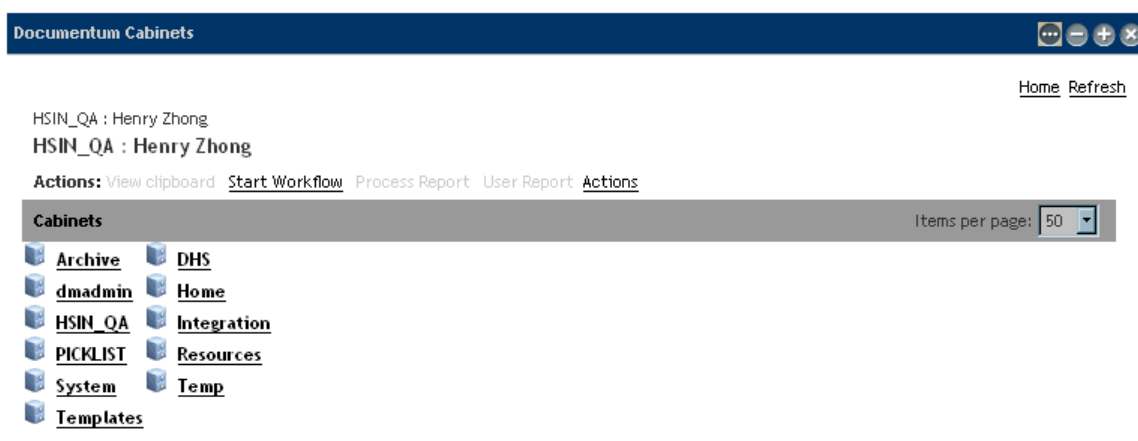


Figure 41 - Cabinets portlet displaying cabinets

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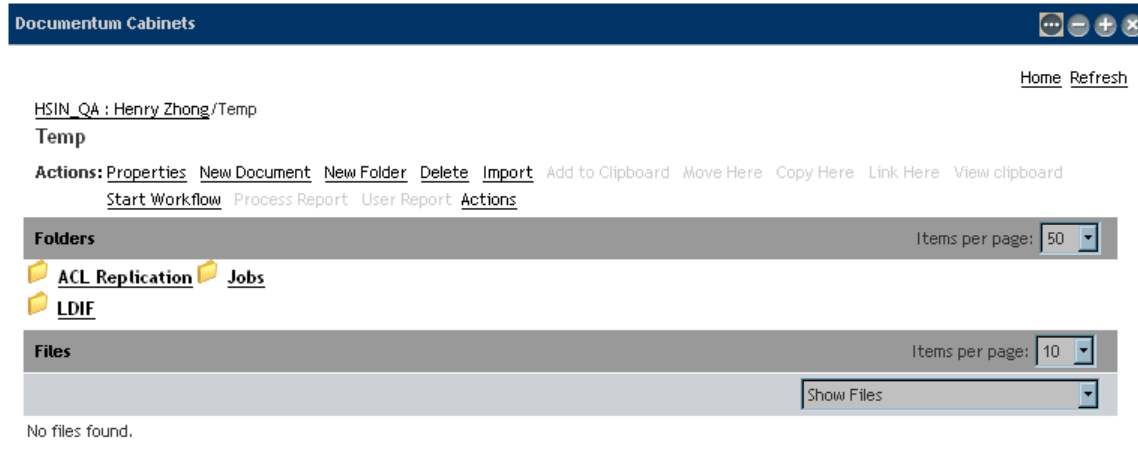


Figure 42 - Cabinets portlet displaying contents of Temp cabinet

The Home Cabinet portlet can be found under a user's private set of pages titled "My Home". The Home Cabinet, along with the Subscriptions portlet, can be found on the My Documents tab.

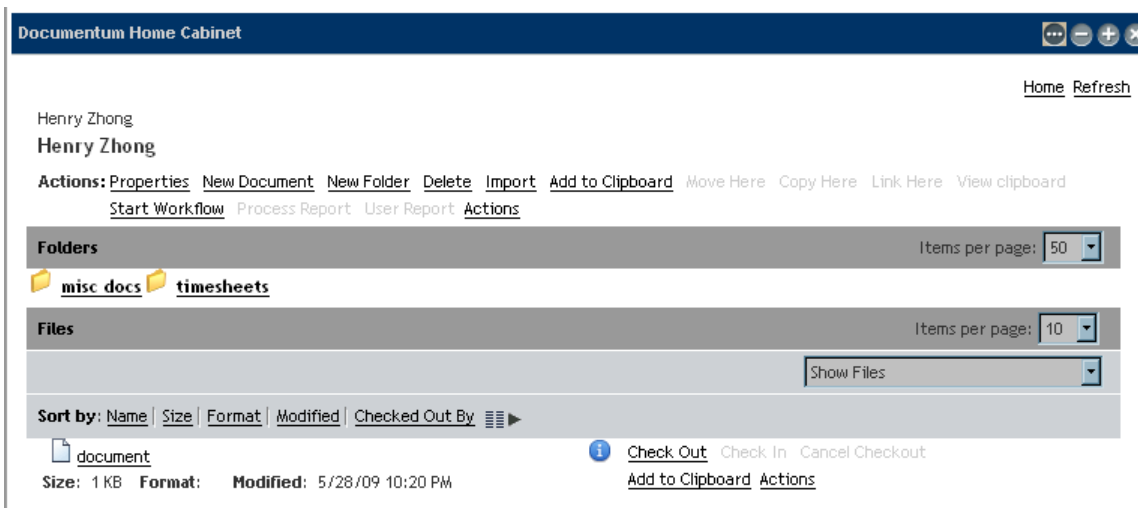


Figure 43 - Home Cabinet portlet showing folder containing two sub folders and a file

4.6.1.4 Functionality

The following functionality applies to both the Cabinets and Home Cabinets portlets, except that only the Cabinets portlet can be used to create cabinets.

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4.6.1.4.1 Cabinet Creation

To create a new cabinet in the Cabinets portlet, navigate to the repository location to create the cabinet then click New Cabinet. If New Cabinet is not displayed then click the Actions link and then click the New Cabinet link on the Actions page. In the Create tab, enter the name of the new cabinet and the type of cabinet. Additional information about the cabinet can optionally be entered in the Info tab and permissions can be set on the Permissions tab. Click Finish to create the cabinet.

4.6.1.4.2 Folder Creation

Folders can be created in a cabinet or folder. To create a new folder the user navigates to the location in the cabinet or folder to create the new folder and clicks on the New Folder link. If New Folder is not displayed then click the Actions link and then click the New Folder link on the Actions page.

New Folder: Create

1. Create 2. Info 3. Permissions

HSIN_QA/Temp

Name: *

Type: Folder (dm_folder)

[+] Show options

Previous Next Finish Cancel

Figure 44 - Create Folder page

On the Create tab, the user types the name of the new folder and enters other information as desired, such as the type of the new folder. Additional options can be displayed by clicking the Show Options link, which will display a Subscribe to this folder checkbox which the user can select. Additional information, such as Title, Subject and Keywords, for the folder can optionally be entered on the Info tab and permissions can be set on the Permissions tab.

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New Folder: Info

1. Create 2. Info 3. Permissions

HSIN_QA/Temp

Name: test folder *

Title:

Subject:

Keywords: [Edit](#)

Owner Name: [Edit](#) Henry Zhong

► Show More

Previous Next Finish Cancel

Figure 45 - Create Folder Info page

The user clicks Finish after entering all the information about the new folder.

4.6.1.4.3 Import

User can import content into the repository from local or networked computers by either browsing for files or by selecting a folder and importing all its contents, including files in the folder's subfolders. The folder directory, however, is not imported. Instead, the files appear together at the same level of the repository location the user is importing to.

To import an item into the repository, navigate to the location in the repository to where the item should be imported then click Import link. If Import is not displayed then click the Actions link and then click the Import link on the Actions page. Click either the Add Files or the Add Folders button which will open a dialog window in which the user browses the local computer's file system to locate the item(s) to import. After adding one or more files or folders to the Selected Files/Folders list, the user clicks the Next button to display the Object Definition page.

Import: File Selection:

Selected Files/Folders:

Welcome.bmp

Add Files Add Folders Remove

Previous Next Finish Cancel

Figure 46 - Import File Selection

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The user then specifies the Name, selects a Mission and Partner Areas, and selects a COI Name for the item. The user can change the Type and Format for the item from their default values. Optionally the user can select a Region and State Name for the item. The user can optionally specify values for Document Type, Document Status, Start, End and Retention dates as well as specify if the item is Shared With Other COI. If there is more than one item being imported, the user clicks the Next button to display an Object Definition page for the next item(s). After completing the Object Definition page for each item to import, the user clicks the Finish button to import the items.

Import: Object Definition:

The screenshot shows a web-based form for defining an import object. The fields are as follows:

- File:** D:\My Documents\My Pictures\screens\HSIN 108\Welcome.bmp
- Name:** Welcome.bmp (highlighted in yellow, with a red asterisk indicating a required field)
- Type:** Document (hsin_document) (dropdown menu)
- Format:** BMP Image (Windows, OS/2) (dropdown menu)
- Mission and Partner Areas:** (dropdown menu, with a red asterisk)
- COI Name:** (dropdown menu, with a red asterisk)
- Region:** (dropdown menu)
- State Name:** (dropdown menu)
- Document Type:** (dropdown menu)
- Document Status:** (dropdown menu)

Below a dashed line, there are date and time selection fields:

- Start Date:** Date field with a calendar icon and a time field set to 12:00:00 AM
- End Date:** Date field with a calendar icon and a time field set to 12:00:00 AM
- Shared With Other COI:** (dropdown menu)
- Retention Date:** Date field with a calendar icon and a time field set to 12:00:00 AM
- Actual Authors:** [Edit](#) (text link)

At the bottom right, there are **Finish** and **Cancel** buttons.

Figure 47 - Import Object Definition

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4.6.1.4.4 Export

The user can export files from the repository to local or networked computers. A copy of the files is saved to the location the user chooses and the originals remains in the repository. To export files, navigate to the file and click Export link next to the file. If Export is not displayed then click the Actions link and then click the Export link on the Actions page. The user will be prompted to choose a location for the file. Select the location to export the file and click Save.

4.6.1.4.5 Document Creation

The user can create a new document by navigating to the location to create the new document and clicking the New Document link. If New Document is not displayed then click the Actions link and then click the New Document link on the Actions page. If the Choose An Item page is displayed, then the user must select a template for the new document and then and click OK.

New Document: Create

1. Create 2. Info 3. Permissions

HSIN_QA/Temp

Name: *

Type:

Format:

[\[+\] Show options](#)

Figure 48 - Create Document page

The user then specifies the Name and a Type of the new document. Additional options can be displayed by clicking the Show Options link, which will display a Subscribe to this file checkbox which the user can select. After specifying the name of the new document, the user can click the Next button to display the Info page on which the user must select a Mission and Partner Areas as well as a COI Name for the item. Optionally the user can select a Region and State Name for the item on the Info page. The user can also optionally specify values for Document Type, Document Status, and Retention Date as well as specify if the item is Shared With Other COI. The user can click the Next button to specify Permissions for the new document or click the Finish button to create the new document with the default permissions.

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New Document: Info

1. Create 2. Info 3. Permissions

HSIN_QA/Temp

Name: *

Mission and Partner Areas: *

COI Name: *

Sub COI Name:

Region:

State Name:

Document Type:

Retention Date:

Actual Authors: [Edit](#)

Start Date:

End Date:

Shared With Other COI:

Keywords: [Edit](#)

[Previous](#) [Next](#) [Finish](#) [Cancel](#)

Figure 49 - Create Document Info page

4.6.1.4.6 View

Viewing allows the user to see the contents of a file but not to modify it in the repository. Viewing lets the user view the contents of a file without having to check it out, or when it is locked by another user, or when the user does not have adequate permission levels assigned to allow them to edit the file. To view a file in read only mode, the user locates the file in the repository and then clicks the file name or the thumbnail (if present).

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4.6.1.4.7 Check Out

To edit a file the user must first check it out from the repository. Checking out a file locks it in the repository so that no one else can edit it and copies the file to the user's computer. The user can access the file on their computer by navigating to their checkout directory and opening the file. To check out a file navigate to the file then click Checkout on the file's line item. If Checkout is not displayed then click the Actions link and then click the Checkout link on the Actions page. Click OK to check out the file.

4.6.1.4.8 Cancel Check Out

If the user chooses to cancel checkout, any changes made since they checked out the file are discarded, and the file is unlocked in the repository. To cancel checkout, navigate to the file or files in the repository then click Cancel Checkout next to the file. If Cancel Checkout is not displayed then click the Actions link and then click the Cancel Checkout link on the Actions page. Click OK to confirm cancellation of the check out.

Cancelling checkout is normally done by the user whom checked out the file, however an administrator can also cancel a user's checkout to release their lock on the file so that another user can checkout and lock the file.

4.6.1.4.9 Check In

Users can only check in a file if they have the file checked out. Users cannot check in files that have been locked by other users. Checking in a file makes it the current version of the file which users will access by default. Users can optionally access previous versions of the file.

To check in files, navigate to the file in the repository and click Checkin on the line item for the file. If Checkin is not displayed then click the Actions link and then click the Checkin link on the Actions page.

Then enter the checkin details such as version choice, version label, and description. Selecting the same version overwrites the original file with the new version. Selecting a minor version increments the decimal part of the version number (for example, from 1.4 to 1.5). Selecting a major version increments the whole version number (for example, 1.4 to 2.0). Select a minor version increment if the user only made minor changes to the document. Select a major version increment if the user changed more than 15% of the document's content.

The user can also select to change the format of the object using the drop-down list. The user can check the Full Text Indexed checkbox to turn full text indexing on (checked) or off (unchecked). The user can retain their lock on the file by checking the Retain Lock checkbox to retain (checked) or not retain (unchecked) the lock on the file when the check in completes.

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Checking the Make this the current version checkbox makes the object being checked in the current version and checking the Subscribe to this file checkbox subscribes to the object being checked in.

The user selects the file to check in by clicking the Browse button and navigating to then highlighting the object to check in followed by clicking the Open button followed by the OK button.

4.6.1.4.10 View Versions

To display a list of all the versions of a file, navigate to the file and click the Versions link. If Versions is not displayed then click the Actions link and then click the Versions link on the Actions page.

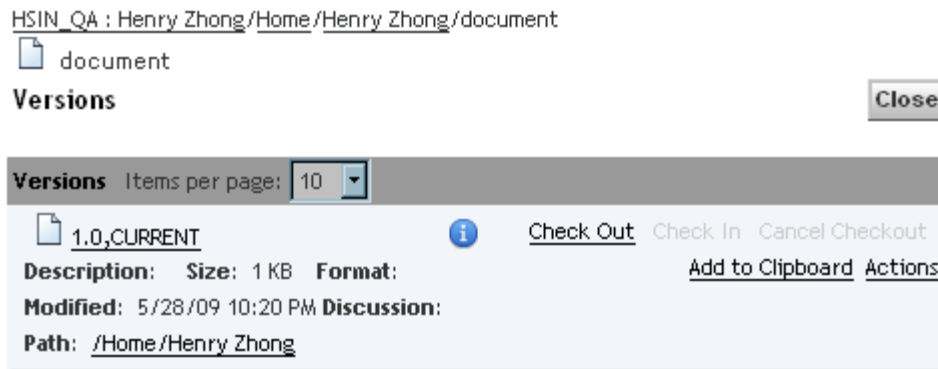


Figure 50 - Version page

4.6.1.4.11 Properties, Permissions and History

Properties are descriptive characteristics, such as creation date, format, or lifecycle state. All repository items have properties. If the user has the proper permissions, they can access and modify properties. Open an item's properties through the icon i.

The properties page often includes multiple tabs with each tab covering the settings that govern a particular functionality. The general properties tab includes things such as the item's name, creator, version number, and keywords. Keywords are the words that identify a file in a search.

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The screenshot shows the 'General Properties' page for an object named 'document'. The page has three tabs: 'HSIN', 'Permissions', and 'History'. The 'document' object is shown with a document icon and the text 'Type: hsin_document' and 'Format:'. Below this, the 'Name' field is set to 'document' and is highlighted in yellow. The 'Mission and Partner Areas' dropdown is set to 'DHS'. The 'COI Name' dropdown is set to 'GPD'. The 'Region', 'State Name', 'Document Type', and 'Document Status' fields are all dropdown menus. Below a dashed line, the 'Start Date' and 'End Date' fields are set to 'Date' and '12:00:00 AM'. The 'Shared With Other COI' dropdown is set to a greyed-out option. The 'Retention Date' field is set to 'Date' and '12:00:00 AM'. The 'Actual Authors' field has an 'Edit' link. At the bottom right, there are 'OK' and 'Cancel' buttons.

Figure 51 - General Properties page

If a property value is editable, the value can be edited in one of two ways: either set the value directly in the property field, or click the Edit link if it appears next to the property to open a separate page for setting the property's values.

The Permissions tab, if available, allows the user to set permissions for the object. There are two types of permissions: basic permissions set the access rights to an object and extended permissions allow additional functions to be carried out on the object.

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HSIN **Permissions** **History**

Add Permissions for additional users and groups

 **document** 
Type: hsin_document
Format:

Summary:

Your Permissions: Delete, Run procedure, Change location, Change state, Change permission, Change owner

Permission Set Name: [Select](#) dm_4501f45480000608

Permission Set Owner: Henry Zhong

Description: dm_4501f45480000608

Additional Permissions:
Add Permissions for additional users and groups

[Add](#)

Items per page 10

<u>User/Group</u>	<u>Permissions</u>	<u>Extended Permissions</u>
<input type="checkbox"/> dm_world	Read	Change location, Run procedure
<input type="checkbox"/> dm_owner	Delete	Run procedure, Change location
<input type="checkbox"/> dm_group	Version	

Restrictions
Deny users and groups access to this object

Advanced Permissions
Edit Permissions for Required Groups and Required Group Sets.

[Search](#)

OK **Cancel**

Figure 52 - Permissions page

The History tab displays the item's history. The history of an item is a list of events that have occurred to that item, such as checkout, checkin, and promote. Event information

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includes the user responsible for the event, the date, and time on which it occurred and other information.

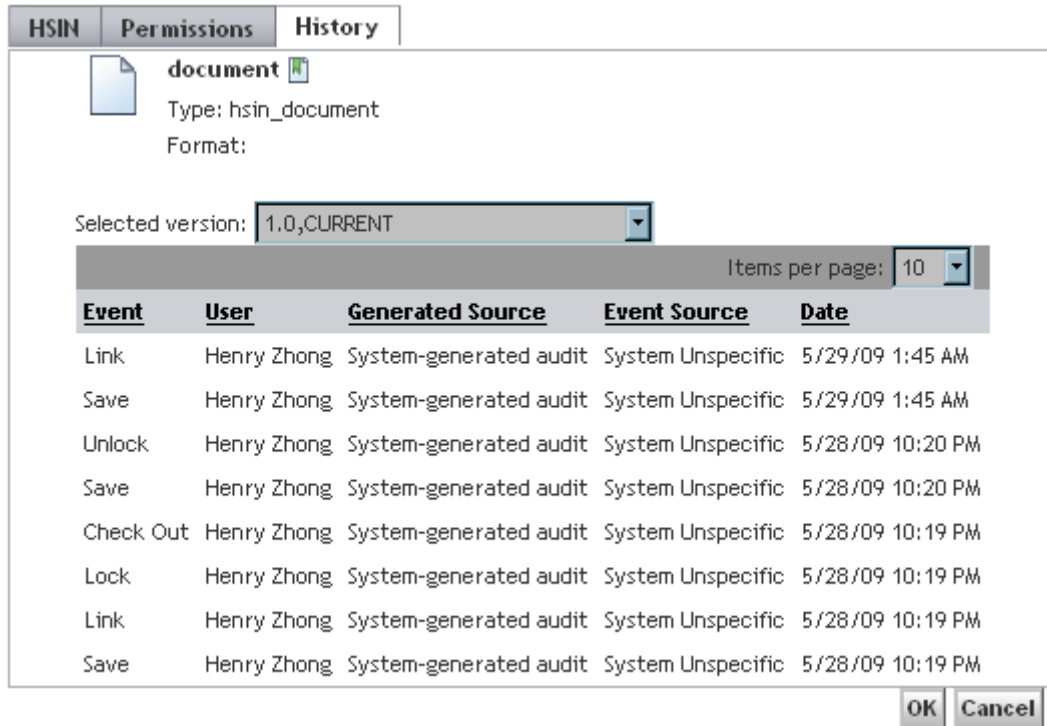


Figure 53 - History page

4.6.1.4.12 Rename

To rename a folder, navigate to through the repository until the contents of the folder are displayed and then click the Properties link. If Properties is not displayed then click the Actions link and then click the Properties link on the Actions page. Update the Name property on the Info tab and click the OK button to rename the folder.

To rename a file, navigate to the file in the repository and then click the Actions link followed by the Properties Info link on the Actions page. Update the Name property on the Info tab and click the OK button to rename the file.

4.6.1.4.13 Delete

Only users with delete permission to a file or folder can delete it. To delete files or folders from the repository, navigate to the item in the repository and then click the Delete link. If Delete is not displayed then click the Actions link and then click the Delete link on the Actions page. The user might be prompted to specify what to delete:

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Selected Version to delete only the selected version of the file or All Versions to delete all versions of the selected file. Click OK to confirm the deletion.

4.6.1.4.14 Clipboard

The Clipboard holds the files the user is moving, copying, or linking to another location in the repository. The clipboard can hold multiple files at a time.

4.6.1.4.14.1 Add to Clipboard

Items are added to the clipboard by navigating to the item to add to the clipboard and clicking the Add to Clipboard link. If Add to Clipboard is not displayed then click the Actions link and then click the Add to Clipboard link on the Actions page.

4.6.1.4.14.2 View Clipboard

To view the contents of the clipboard, click the View Clipboard link located at the top of the portlet. If View Clipboard is not displayed then click the Actions link and then click the View Clipboard link on the Actions page. Click Cancel to close the clipboard.

4.6.1.4.14.3 Remove from Clipboard

To remove files from the clipboard, the user views the clipboard as described above and then selects the clipboard item(s) by checking the box adjacent to it. The Remove button is then clicked to remove the selected item from the clipboard. Click the Close button to close the clipboard.

4.6.1.4.14.4 Copy from Clipboard

To copy the items in the clipboard to a new location, the user navigates to the location to copy to and clicks the Copy Here link. If Copy Here is not displayed then click the Actions link and then click the Copy Here link on the Actions page. If the Clipboard page appears, the user selects the item to copy then clicks Copy.

Please note that if the user copies a file to a location that already has a file of the same name, then Copy is added to the filename. If the user copies the file to that location a second time, wording is added to the filename that indicates the file is the second copy. For any subsequent copies, the appropriate wording is added to the filename.

4.6.1.4.14.5 Link Items

The user can link a file to multiple locations in a repository allowing access to the file from multiple locations. The file is considered to exist in each of those locations. If a user checks out the file in one location, it is checked out in all locations. When a change is made to the file in one location, it is changed in all locations.

To link items they must be in your clipboard. Then the user navigates to the location to link the item to and clicks Link Here link. If Link Here is not displayed then click the

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Actions link and then click the Link Here link on the Actions page. If the Clipboard page appears, the user selects the item to link then clicks Link.

4.6.1.4.14.6 Move Items

To move items in the clipboard to a new location, the user navigates to the location to move the items to and clicks the Move Here link. If Move Here is not displayed then click the Actions link and then click the Move Here link on the Actions page.

4.6.1.4.15 Sorting Lists and Configuring Columns

The user can sort items in a list according to the fields. To sort files in the repository, click any of the properties on the Sort by line. To reverse the sort order, select the property a second time.

The user can specify what columns appear in a list by clicking the Column Preferences icon  to add or remove the property type attributes from the Selected attributes to display as columns by using the left and right arrow buttons between the lists of Select attributes to display and Selected attributes to display as columns. The order of attributes selected to display as columns can be rearranged by selecting the attribute to reposition and then clicking the up and down arrow icons to the right of the page.

Subscriptions

This section provides instructions on how to use the Subscriptions portlet to subscribe to CMS files and folders they use often or to CMS files and folders they are not directly involved with but have an indirect interest in. Subscribing lets users keep track of changes to such CMS files and folders.

4.6.2.1 Overview

Users can subscribe to and unsubscribe from cabinets, folders and documents. The Subscriptions Portlet displays the list of items the user has subscribed to. The Subscriptions Portlet allows users to open or view an item, which the portlet accesses from its original repository location.

4.6.2.2 Subscribe

To subscribe the user clicks the cabinet, folder or file name in the Cabinets or Home Cabinet portlet to display its details and then clicks the Subscribe link. If Subscribe is not displayed then click the Actions link and then click the Subscribe link on the Actions page. The item will now appear in the Subscriptions portlet.

4.6.2.3 Unsubscribe

To unsubscribe the user locates the cabinet, folder or file to unsubscribe from in the Subscriptions portlet and clicks the Unsubscribe link. If Unsubscribe is not displayed then click the Actions link and then click the Unsubscribe link on the Actions page. The

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cabinet, folder, or file is now removed from the user's subscription list and will no longer be visible in the Subscriptions portlet.

Inbox

This section provides instructions on how to use the Inbox portlet to receive notifications and view, accept and complete CMS tasks. The Inbox portlet is similar to the Inbox of an electronic mail program. When repository users send documents to another repository user, they are notified in their Inbox. If users participate in a workflow, then they will receive task notifications in their Inbox. A user must open a task from their Inbox to accept or complete it.

4.6.3.1 Overview

The Inbox is not included in the user's private pages by default. To add the Inbox portlet, navigate to a user's page and hover the mouse pointer over the "Welcome UserX!" item in the banner at the top of page, where "UserX" is replaced by the name of the user, and select Add Application from the menu. The Add Application dialog will be displayed. The user can locate the Inbox portlet by typing Inbox in the text field or expanding the Documentum menu item. The Inbox portlet can then be added to the page by clicking the Add link to the right of its name or by left clicking and dragging the Documentum Inbox portlet name to the desired location on the page.

4.6.3.2 Viewing Tasks and Notifications

To view tasks and notifications the user clicks the name of the task or notification in the Inbox portlet list. The Info tab of the selected task or notification is displayed by default. In the Info tab, the user can view the instructions and view or check out any attached files.

Notifications only have an Info tab whereas tasks have additional Comments and Progress tabs. A task has buttons that allow the user to Finish, Delegate, Repeat or Close the task. Only the buttons for actions that are allowed in the Tasks current state are available.

4.6.3.3 Accepting and Performing a Task

Before a user can complete or add comments to a task they must first accept it. If the task has been sent multiple users, then the first user to accept the task is the one who performs it. Once a user accepts it, the task is removed from the other users' Inbox.

To accept and perform a task the user opens the task by clicking its name. The Info page of the selected task or notification is displayed by default.

The user can add comments by click the Comments tab and clicking Add. If the user has already added a comment, the Edit button will appear. The user types comments in the Comment field and specifies which recipients to direct the comments to. For subsequent

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recipients specifies that the comment should be sent to all users performing all future tasks in the workflow. For next recipients only specifies that the comment should be sent only to the users performing the next task in the workflow. Then the user clicks OK. These steps can be repeated for as many comments as the user wants to add. To remove a comment, click Remove.

After adding comments, the user can click one of the buttons (Finish, Delegate, Repeat or Close) for the action to perform on the task or notification. To close the task without forwarding it the user clicks Close.

Document and Image Libraries

Users whom need more access to the Content Management System (CMS) repository than the portlets described above provide can use the Webtop application which is displayed on the Community of Interest (COI) Document Library and Image Library tabs.

Additional formal training documentation is available for the Webtop application.

4.7 Directory

This section provides instructions on how to use the Directory portlet to search for and see lists of users and organizations. With the Directory portlet the user can conduct basic or advanced searches for users or organizations.

Overview

A user can look up and view details about HSIN NextGen users and organizations in the Directory portlet.

Setup

The Directory portlet can be added to COI pages, such as the Members sub tab page, and to individual user's private My Home pages.

Procedure

Navigate to a COI's Members sub tab or to user's private My Home page containing the Directory portlet.

Functionality

The Directory portlet supports simple and advanced user and organization searches.

4.7.4.1 Basic User Search

Select the Users tab of the Directory portlet and enter a search term in the text field to the left of the Search button. Pressing the Search button will search for users with a

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first, last or screen name at least partially matching the search term. Leaving the text field empty and pressing the Search button will return a list of all users.

The screenshot shows a web interface for a 'Directory' search. At the top is a dark blue header with the word 'Directory' in white. Below the header are two tabs: 'Users' (highlighted in blue) and 'Organizations' (greyed out). Under the 'Users' tab is a search input field and a 'Search' button. Below the search field is a link that says 'Advanced »'.

Figure 54 - Basic User Search

Each search result will show the First Name, Last Name, Screen Name, Job Title and list of Organizations for the user. Clicking on one of the search results will display detailed information about the user. If the current user does not have permissions to display the details of the user, an error message will be displayed.

The screenshot shows the search results for the user 'todd'. At the top, the 'Users' tab is selected. The search input field contains 'todd' and the 'Search' button is visible. Below the search field is a link that says 'Advanced »'. A horizontal dashed line separates the search interface from the results table. The table has five columns: 'First Name', 'Last Name', 'Screen Name', 'Job Title', and 'Organizations'. The first row of data shows 'Todd' as the first name, 'Bizman' as the last name, 'todd' as the screen name, and 'Exercise Support, Mission Support' as the organizations.

First Name	Last Name	Screen Name	Job Title	Organizations
Todd	Bizman	todd		Exercise Support, Mission Support

Showing 1 result.

Figure 55 - User Search Result

4.7.4.2 Advanced User Search

Select the Users tab of the Directory portlet and click the Advanced link below the text field to the left of the Search button. Enter search criteria in one or more of the text fields below to the First Name, Middle Name, Last Name, Screen Name, and / or Email Address and select either All or Any in the Match selection menu. Pressing the Search button will search for users matching the specified criteria. Search results contain identical information and can access user details the same way as the Basic user search. The user can return to the Basic search display by clicking the Basic link below the Search button.

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The screenshot shows a web interface for a Directory portlet. At the top, there is a dark blue header with the word "Directory" in white. Below this, there are two tabs: "Users" (highlighted in blue) and "Organizations" (greyed out). Under the "Users" tab, there is a section titled "Match" with a dropdown menu set to "All" and the text "of the following fields:". Below this, there are five input fields: "First Name", "Middle Name", "Last Name", "Screen Name", and "Email Address". The "First Name" field is highlighted in yellow. Below the input fields is a "Search" button. At the bottom left, there is a link labeled "Basic" with a left-pointing arrow.

Figure 56 - Advanced User Search

4.7.4.3 Basic Organization Search

Select the Organizations tab of the Directory portlet and enter a search term in the text field to the left of the Search button. Pressing the Search button will search for organizations at least partially matching the search term. Leaving the text field empty and pressing the Search button will return a list of all organizations.

The screenshot shows the same Directory portlet interface, but with the "Organizations" tab selected and highlighted in blue. The "Users" tab is now greyed out. The "Match" section is not visible. A large yellow text input field is present, followed by a "Search" button. Below the input field is a link labeled "Advanced" with a right-pointing arrow.

Figure 57 - Basic Organization Search

Each search result will show the Name, Parent Organization, Type, City, Region and Country of the organization. Additionally, a View Users link will be displayed to the right of each result. If an organization has suborganizations, an Actions button will be displayed rather than the View Users link. The Actions button will have choices to View Users and View Suborganizations.

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Users **Organizations**

oil Search

[Advanced >](#)

Name	Parent Organization	Type	City	Region	Country
Oil	Oil and Gas	Sub-COI			View Users
Oil and Gas	Critical Sectors	COI			Actions

Showing 2 results.

Figure 58 - Organization Search Results

Clicking on one of the search results will display detailed information about the organization. If the current user does not have permissions to display the details of the organization, an error message will be displayed.

Clicking on the View Users link or selecting View Users from the Actions button menu will display a list of the users who are members of the organization. The list of users belonging to the organization is displayed in the Users tab of the Directory portlet and behaves the same as results from searches performed from the Users tab.

Users **Organizations**

Search

[Advanced >](#)

Filter by Organization: Oil

First Name	Last Name	Screen Name	Job Title	Organizations
Mark	Cazavelan	caz		Oil, Oil and Gas
David	Katz	david.katz		Oil, Oil and Gas
Bruce	Kirchner	bruce.kirchner		Oil, Oil and Gas
Admin	User	admin	Administrator	Critical Sectors, Functional Test COI, Gas, Oil, Oil and Gas, Railway and Pipeline

Showing 4 results.

Figure 59 - Organization Users

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Selecting View Suborganizations from the Actions menu updates the Organizations tab search results table to just contain the suborganizations of the parent organization search result.

The screenshot shows a web interface with two tabs: "Users" and "Organizations". The "Organizations" tab is active. Below the tabs is a search bar with a "Search" button and a link for "Advanced »". A filter is applied: "Filter by Organization: Oil and Gas". Below this is a table with the following data:

Name	Parent Organization	Type	City	Region	Country	
Gas	Oil and Gas	Sub-COI				View Users
Oil	Oil and Gas	Sub-COI				View Users

Showing 2 results.

Figure 60 - Organization Suborganizations

4.7.4.4 Advanced Organization Search

Select the Organizations tab of the Directory portlet and click the Advanced link below the text field to the left of the Search button. Enter search criteria in one or more of the text fields below to the Name, Street, City, and / or Zip and select either All or Any in the Match selection menu. The user can also select the Type of organization to search for, the Country and / or region the organization is located. Pressing the Search button will search for organizations matching the specified criteria. Search results contain identical information and can access organization details the same way as the Basic organization search. The user can return to the Basic search display by clicking the Basic link below the Search button.

The screenshot shows the "Organizations" tab active. Below the tabs is a search bar with a "Search" button and a link for "Basic". Below the search bar is a "Match" dropdown menu set to "All". Below the "Match" dropdown are seven search fields: Name, Street, City, Zip, Type, Country, and Region. The "Type" dropdown is set to "Any". Below the search fields is a "Search" button and a link for "Basic".

Figure 61 - Advanced Organization Search

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4.8 Meeting Rooms

This section provides instructions on how to use Connect Pro client to hold online meetings with multiple users. Online meetings differ from Meeting Rooms provided by the Chat client in that they support rich content sharing such as files, web pages and shared whiteboards as well as text and voice communications. With the Connect Pro client, users can:

- create meeting rooms
- start meetings
- enter a meeting
- control which users can be in a meeting
- place a meeting on hold
- share content such as files, web pages, whiteboards
- take meeting notes
- conduct chat and A & A sessions
- poll attendees

Overview

Meeting participants can be both within the organization as well as external to the organization. Meeting rooms allow participants to share computer screens or files, broadcast live audio and video, and participate in interactive online activities.

This section provides a description of the most commonly used functionality of the Connect Pro client. Additional training documentation is available with more comprehensive instructions to utilize the full capabilities of Connect Pro.

Setup

To take part in a meeting, users must have a Web browser, a copy of Flash® Player 8 or higher, and an Internet connection. Each user's capabilities in a meeting depend on their assigned role and permissions.

Procedure

Navigate to a COI that the user is a member of and click the Meetings sub tab. A new Web browser will pop up prompting the user to enter their Connect Pro login credentials. After supplying valid credentials, the Web browser will display the Connect Pro client.

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My Profile | Help | Logout: **Zhong Henry**

Home | Content | Meetings | Event Management | Reports | Administration

Search ...

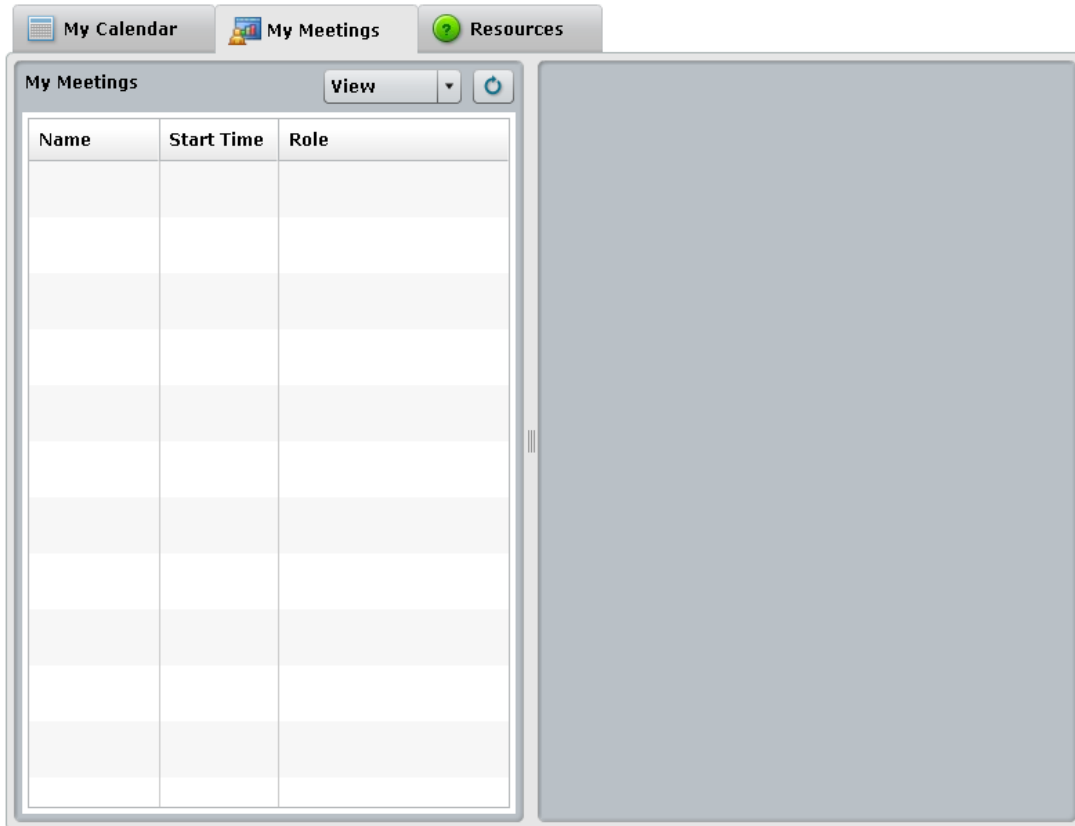


Figure 62 - Connect Pro client

Functionality

Meeting Rooms have a URL location assigned to them by the system when they are created. Clicking a meeting room's URL takes the user into the meeting room. Once a meeting room has been created, it exists until deleted. This allows meeting rooms to be reused over and over, such as for a weekly meeting.

The meeting room host can leave the meeting room open or close it between scheduled meetings. If a meeting room is open between meetings, attendees are free to enter the room at any time to view content.

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4.8.4.1 Meeting Room Overview

Content in a meeting room is displayed in pods, which are panels that contain various types of media. Individual pods contain a list of those attending the meeting, notes, chat, files, and video. The meeting room menu bar for the meeting host consists of Meeting, Present, Layouts, Pods, and Help menus, whereas presenters and participants only see the Meeting and Help menus.

In the right corner of the menu bar, the colored bar indicates the connection status of the meeting room. Messages and warnings also appear in this corner. A red circle in the menu bar indicates that the host is recording the meeting. The Secure Sockets Lock indicates that the meeting is connected over a secure socket (verifying the host server's identity).

Hosts will see a layout navigation bar at the bottom of the meeting room window. The default layouts are Sharing, Discussion, and Collaboration. When a host clicks a different layout on the layout navigation bar, the new layout is displayed on every attendee's screen.

4.8.4.2 Meeting Roles and Permissions

The user's meeting role determines their capabilities for sharing, broadcasting, and other activities in an Connect Pro meeting. There are three roles for meeting room attendees: host, presenter, and participant.

The creator of a meeting is designated as the host by default. The host can specify each attendee's role, including selecting other attendees to be hosts or presenters for the meeting.

Hosts can set up a meeting, invite guests, add content to the library, share content, and add or edit layouts in a meeting room. They can promote other participants to the role of meeting room host or presenter, or give enhanced permissions to a participant without promoting the participant. Hosts are able to create and manage small group breakout rooms within a meeting. They can also perform all the tasks that a presenter or participant can.


Presenters can share content already loaded into the meeting room from the library and share content from their computer, including Adobe® Presenter presentations (PPT files), Flash® application files (SWF files), images (JPEG files), and FLV files. They can share their screen with all attendees, chat, and broadcast live audio and video.

Participants can view the content that the presenter is sharing, hear and see the presenter's audio and video broadcast, and use text chat.

The host and presenters have access to a special Presenter Only display area which is not visible to attendees. Hosts and presenters can use the Presenter Only area to prepare content to be shared with attendees or to view confidential content that is not shared with attendees.

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4.8.4.2.1 Change Attendee's Role

To change an attendee's role, the host selects the name of the attendee in the Attendee List pod and clicks the Set User Role button  in the lower-left corner of the Attendee List pod. Then the host selects the role to give the selected attendee from the pop-up menu. The host can select to give the attendee the role of Participant, Presenter or Host. The icon of the attendee changes on all attendees' screens and the attendee names in the Attendee pod will be resorted according to role.

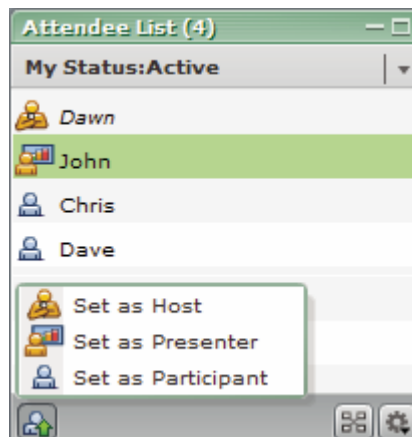



Figure 63 - Change Attendee Role

4.8.4.2.2 Change Host's Own Role

The host can use the Attendee pod only to demote themselves. To promote themselves, they must use the Present menu at the top of the meeting room window. The Present menu is visible to a demoted presenter or participant only if they initially joined the meeting as a host. To change the host's own role, click the Present menu at the top of the meeting room window and select one of the following:

- Make Me a Participant.
- Make Me a Presenter.
- Make Me a Host.

4.8.4.2.3 Assign Enhanced Participant Rights

The host can change the rights of a participant to give them control over selected pods. This enhances a participant's rights without promoting the participant to the presenter or host role. To assign a participant enhanced rights, select the name of one or more participants from the Attendee List pod and click the Pod Options button  in the Attendee List pod. Select Change Enhanced Participant Rights and select the pods that the host wants the selected participants to control in the dialog following by clicking OK.

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4.8.4.3 Meeting Room Library

The Meetings tab in Connect Pro client contains three panes for accessing meetings: Shared Meetings, User Meetings, and My Meetings. Each pane contains folders and files with meeting content and recordings. Users can create and manage content in the My Meetings pane that appears when they are logged into Connect Pro client. Access to content in the other panes is determined by the meeting library permissions set for each user by the Connect Pro administrator.

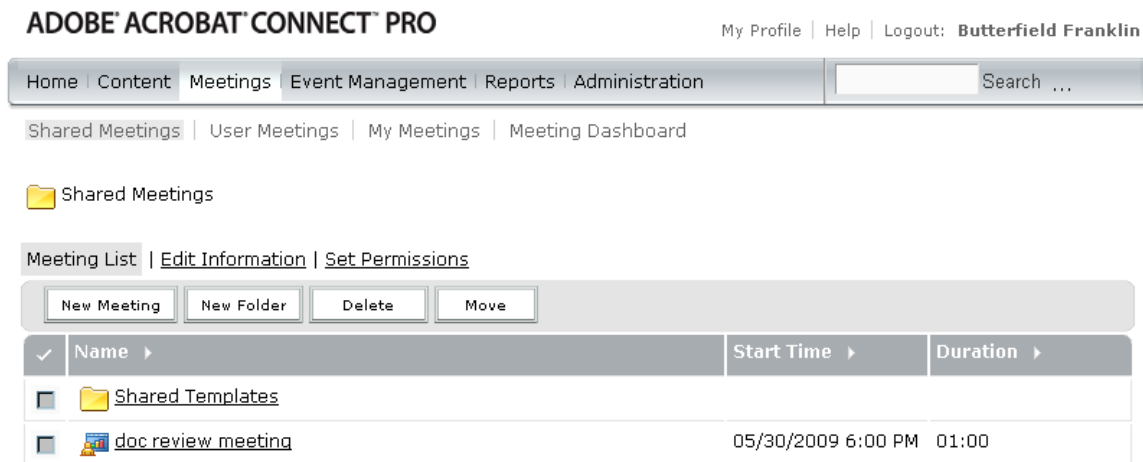


Figure 64 - Meeting Library

Content placed in the Meetings library is available only for use in meetings. To make the content to be available for other activities initiated in Connect Pro client (such as events, seminars, or training), upload the content to the Content library, or move content from the Meetings library to the Content library.

4.8.4.4 Create Meeting Room

There are two methods to create a new meeting. The first method begins by clicking the Meeting button in the Create New: line of the Connect Pro client. This method creates the meeting in the individual user's My Meetings folder. The second method is used to create a meeting in a different folder. To use this alternative, navigate to the desired folder in the Meetings library and click the New Meeting button.

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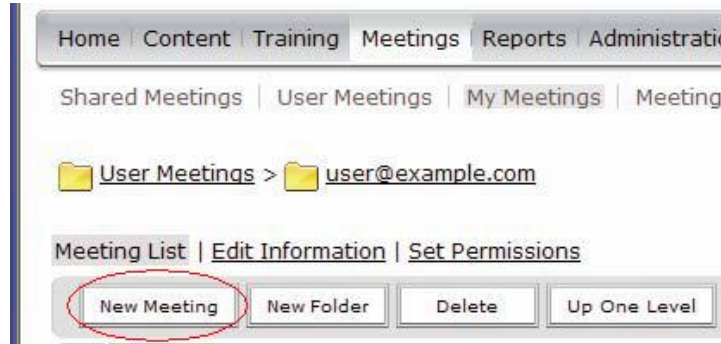


Figure 65 - Create Meeting from Meetings library

Both methods of creating a meeting result in the user being presented with a page that allows specification of meeting information such as Name, Summary, Start Time, Duration, Language, and Access permissions. The user enters the appropriate information and clicks the Next or Finish buttons at the bottom of the page.

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Enter Meeting Information

[Enter Meeting Information](#) > [Select Participants](#) > [Send Invitations](#)

Meeting Information

Name: *

Custom URL:

(Leave this field blank for a system-generated URL, or include a unique URL path. For example: "productdemo" will result in http://hsin106.hsin.gd-ais.com/productdemo/)

Summary:
(max length=1000 characters)

Start Time:

Duration: hours:minutes

Select Template:

Language: *

Access:

- Only registered users may enter the room (guest access is blocked)
- Only registered users and accepted guests may enter the room
- Anyone who has the URL for the meeting can enter the room

Audio Conference Settings

Do not include any audio conference with this meeting.

Include audio conference details with this meeting.

Conference Number(s):

Moderator Code:

Participant Code:

Update information for any items linked to this item.

* - indicates required fields

Figure 66 – New Meeting Information

If the user clicks the Next button, a Select Participants page is displayed with two lists: Available Users and Groups and Current Participants for the meeting. Users can be added by selecting them in the Available Users and Groups list and clicking the Add button. By default users will be added as a Participant in the meeting, but they can

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alternately be assigned either the Host, Presenter, or Denied roles by selecting them in the Current Participants list and clicking the Permissions button. Users can be removed from the meeting by selecting them in the Current Participants list and clicking the Remove button. Either the Next or Finish buttons are pressed after the user selected the participants.

Select Participants

Enter Meeting Information > **Select Participants** > Send Invitations

The screenshot displays a web-based interface for selecting meeting participants. It is divided into two main columns: 'Available Users and Groups' on the left and 'Current Participants For doc review meeting' on the right. Below these columns are search bars and action buttons.

Available Users and Groups	
Administrators	Administrators
Administrators - Limited	Administrators - Limited
Authors	Authors
Event Managers	Event Managers
Meeting Hosts	Meeting Hosts
DS Users	DS Users
104 hsin	hsin104
108 hsin	hsin108
admin critical	critical.admin
admin dm	dmadmin
admin elec	elec.admin
admin jasper	jasperadmin

Current Participants For doc review meeting		
Butterfield Franklin	Host	admin

Navigation buttons at the bottom: Cancel, < Previous, Next >, Finish.

Figure 67 - New Meeting Participants

If the user clicks the Next button a Send Invitations page is displayed allowing the user to select which participant roles should receive an email invitation to the meeting as well as enter a Subject and Message Body for the email message that will be sent. Clicking Finish will create the meeting and send the email invitations specified.

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Send Invitations

[Enter Meeting Information](#) > [Select Participants](#) > **Send Invitations**

This feature allows you to send invitations to your meeting invitees. These invitations include the URL, start time, end time and description of the meeting.

Send E-Mail Invitations:

- Send Invitations
 Do not send invitations

To:

All Hosts, Presenters and Participants

Subject:

Adobe Acrobat Connect Pro - Meeting I

Attach Microsoft® Outlook™ calendar event (iCal) to e-mail message:

Yes

Message Body:

Please join me in a Connect Pro Meeting.

Meeting Name: doc review meeting
Invited By: Butterfield Franklin (admin@example.com)
When: {meeting-time}
Time Zone: {time-zone}

To join the meeting:

Figure 68 - New Meeting Invitations

While navigating the pages to create the meeting, the user can click the Cancel or Previous buttons. Please note that clicking the Cancel button might still result in the meeting being created. If this happens the user can delete the meeting from their list of meetings.

4.8.4.5 Starting a Meeting

The meeting room host starts a meeting by entering into the meeting room and then inviting other users though email or instant messaging to do the same. When the host user has entered the meeting room, the host can perform tasks to set up the meeting for attendees, such as specifying phone conference information, accepting or declining requests to join the meeting, rearranging pods, and typing in notes.

4.8.4.6 Entering Meeting Room

Users do one of the following to enter a meeting room:

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- From the Home page in Connect Pro client, click My Meetings, and click the Open button for the desired meeting.
- In Connect Pro client, navigate to the Meeting Information page for a specific meeting and click Enter Meeting Room.
- Click the meeting URL in the e-mail invitation that the user received and then provide their login and password and then click Enter Room.
- Enter the meeting URL in a Web browser, provide login and password and then click Enter Room.

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My Profile | Help | Logout: Butterfield Franklin

Home | Content | Meetings | Event Management | Reports | Administration

My Calendar | My Meetings | Resources

My Meetings View [dropdown] [refresh]

Name	St...	R...
doc review... Open	05...	H...

doc review meeting

Overview

Name doc review meeting

URL <http://hsin106.hsin.>

Summary

Figure 69 - Start Meeting from Home page

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My Profile |

Home | Content | Meetings | Event Management | Reports | Administration

Shared Meetings | User Meetings | My Meetings | Meeting Dashboard

Shared Meetings > doc review meeting

Meeting Information | Edit Information | Edit Participants | Invitations | Uploaded Content | Recordings | Reports

Meeting Information

Name: **doc review meeting**

Summary:

Start Time: **05/30/2009 6:00 PM**

Duration: **01:00**

URL: **<http://hsin106.hsin.qd-ais.com/r16171109/>**

Number of users in room:

Language: **English**

Access: **Only registered users and accepted guests may enter the room**

Telephony Information: **Audio Bridge:**

Enter Meeting Room

Figure 70 - Start Meeting from Meeting Library

4.8.4.7 Controlling Meeting Attendees

While in the meeting room, hosts can invite people to attend a meeting. A host can choose to block access to a meeting, and allow or disallow requests to enter a blocked meeting.

The host can invite attendees while a meeting is in progress by either selecting Meeting > Manage Access And Entry > Invite Participants from the menu bar or by clicking the Pod Options button in the lower-right corner of the Attendee List pod and selecting Invite Participants. In the Invite Participants dialog box, the host can either click the Compose E-mail button to open the host's default e-mail application and send invitees an automatically generated e-mail message with the meeting URL or copy the meeting URL from the Invite Participants dialog box into an e-mail or instant message and send the message to invitees. The host can then return to the meeting room by clicking Cancel to close the dialog box.

The host can block incoming attendees by selecting Meeting > Manage Access and Entry > Block Incoming Attendees in the meeting bar. To allow incoming attendees to

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request entry to the meeting, select Incoming Attendees Can Request Entry. Deselect this option to disallow requests to enter the meeting. Optionally edit the message for incoming attendees in the text box and select Save Message to save the message for future use. Click OK.

4.8.4.8 Place a Meeting on Hold


The host can place a meeting on hold to allow presenters to enter a meeting room while the meeting is not in session, so that they can prepare materials for the meeting. To place participants on hold the host selects Meeting > Manage Access And Entry > Place Participants On Hold in the menu bar then can revise the Message For Participants if desired, and clicks OK to place the meeting on hold and display the message to participants.

To find out how many participants are waiting to enter a meeting you have placed on hold, place the pointer over the Stop Meeting icon at the right of the meeting room menu bar.

To restarting a meeting that is on hold the host hover the mouse pointer over the hold meeting icon  in the upper-right corner of the meeting room and in the notification window click Start Meeting.

4.8.4.9 End a Meeting

The host can remove everyone from a meeting and end the meeting to deny everyone access to the meeting room, including hosts, presenters, and participants. To end a meeting the host selects Meeting > End Meeting in the menu bar, optionally revises the messages, and then clicks OK to end the meeting and display the message to participants.

To restarting a meeting that has ended the host hover the mouse pointer over the hold meeting icon  in the upper-right corner of the meeting room and in the notification window click Start Meeting.

4.8.4.10 Updating Meeting Information

After creating a meeting, the host can update meeting information by clicking the Meetings tab at the top of the Connect Pro client home page then navigating to the folder that contains the meeting and clicking the meeting name in the list. In the Meeting Information page, click the Edit Information link on the navigation bar. Edit any of the meeting information, such as start time or duration and then click Save.

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My Profile

Home | Content | Meetings | Event Management | Reports | Administration

Shared Meetings | User Meetings | My Meetings | Meeting Dashboard

Shared Meetings > doc review meeting

Meeting Information | Edit Information | Edit Participants | Invitations | Uploaded Content | Recordings | Reports

Meeting Information

Name: *

Summary: (max length=1000 characters)

Start Time:

Duration: hours:minutes

Language: *

- Access:
- Only registered users may enter the room (guest access is blocked)
 - Only registered users and accepted guests may enter the room
 - Anyone who has the URL for the meeting can enter the room

Audio Conference Settings

- Do not include any audio conference with this meeting.
- Include audio conference details with this meeting.

Conference Number(s):

Moderator Code:

Participant Code:

Update information for any items linked to this item.

* - indicates required fields

Figure 71 - Update Meeting Information

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4.8.4.11 Managing Meeting Participants

After creating a meeting, the host can change the participants list.

To add meeting participants, select the users or groups to add from Available Users And Groups list and click Add. For each new participant user or group that added, select the appropriate permission type (Participant, Presenter, Host, or Denied) from the Set User Role menu at the bottom of the Current Participants list.

To remove meeting participants, select the users or groups to remove from the Current Participant list and click Remove.

To change a participant’s meeting permission, select the user or group whose meeting permissions the host wants to change from the Current Participants list and then select the new user role (Participant, Presenter, Host, or Denied) from the Set User Role menu at the bottom of the Current Participants list.

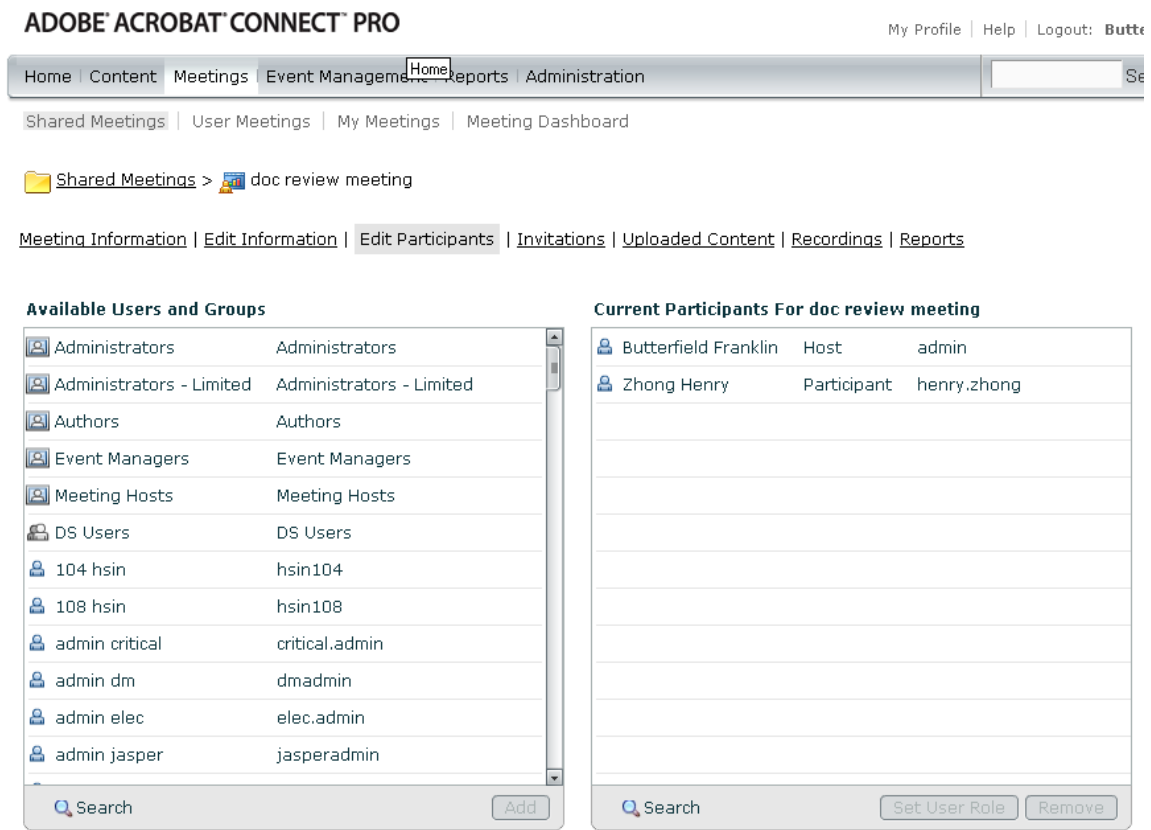


Figure 72 - Update Meeting Participants

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4.8.4.12 Managing Meeting Content

After creating a meeting, users with Manage permissions for the meeting folder can manage content associated with the meeting. Users can view uploaded content, move the content to the Content library, or delete uploaded content.

To view the list of uploaded content, click the Meetings tab at the top of the Connect Pro client home page, navigate to the folder that contains the meeting then click the meeting name in the list. In the Meeting Information page, click the Uploaded Content link on the navigation bar to see the list of all uploaded content. To see the information about a specific item in the list, click the item name. To determine if the content is still being used in the meeting room, view the Referenced column. A Yes indicates that it is still being used. An empty column indicates that it is not.

To move uploaded content to the Content library, display the uploaded content as described above and then click the check box to the left of each file you want to move. Then click the Move To Folder button on the navigation bar and navigate to the folder location in the Content library to move the content file by clicking the folder titles or the Up One Level button. Once the appropriate destination has been selected, click Move and then click OK.

To delete uploaded content, display the uploaded content as described above and then click the check box to the left of each file that you want to delete. Click Delete and also click Delete on the confirmation page to permanently delete the selected content.

4.8.4.13 Sharing Content

Hosts and presenters (and participants who have been given rights) use the Share pod to display content to attendees, such as:

- Selected items on a user's computer screen, including one or more open windows, one or more open applications, or the entire desktop.
- A document, such as a presentation, an FLV file, a JPEG, or other file format.
- A whiteboard with a variety of writing and drawing tools. Users can share a stand-alone whiteboard, or a whiteboard overlay that appears on top of other shared content.

Documents shared in the Share pod can be viewed but not downloaded by attendees. To enable attendees to download documents, a host or presenter must upload the documents to the File Share pod.

When a user shares content in the Share pod, attendees see the user's mouse pointer move in the Share pod window. All activities the user performs in shared window, application, or document are visible to attendees.

Presenters and hosts must install the Add-in the first time they attempt to upload content or share a screen. The Add-in is a special version of Flash Player with additional

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features for hosts and presenters. The Add-in provides support for uploading files to the server and sharing screens during a meeting. It also provides additional audio support.

Note: If you have a pop-up blocker enabled in your browser, the dialog box for downloading the Add-in will not appear. To correct this problem, temporarily disable the pop-up blocker.

4.8.4.13.1 Sharing Computer Screens

A user can share their computer screen by either clicking the My Computer Screen button in the middle of a blank Share pod or clicking the Share button on the Share pod control strip, and then selecting My Computer Screen from the pop-up menu. In the Start Screen Sharing window, the user selects one of the following:

- Select Desktop to share the user's entire desktop. If the user has more than one monitor connected to your computer, a desktop appears for each monitor. Choose the desktop that the user wants to share.
- Select Windows to share one or more windows that are open on the user's computer. Choose the window or windows that the user wants to share.
- Select Applications to share an application and all its related windows that are open on the user's computer. Choose the application or applications that the user wants to share.

Click the Share button at the bottom of the Start Sharing window to begin sharing.

4.8.4.13.2 Sharing Control of a Computer Screen

While screen sharing, a user can pass control of the shared desktop, window, or application to another presenter. The presenter must request control before the user can hand over your shared screen to them.

4.8.4.13.3 Requesting Control of a Computer Screen

To request control of a shared screen from another presenter, click the Request Control button on the Share pod control strip. In the Attendee List pod, hover the mouse pointer over the name of the attendee whose screen the user wants to control and from the pop-up menu, select Request Screen Share.

If the request is accepted, a message informs the user that they have been granted control of the screen. The Request Control button becomes a Release Control button and the user has control of the shared screen. When the user is finished controlling the computer screen they can click the Release Control button on the Share pod control strip (or in the notification window) to return control of the shared screen to the original presenter.

4.8.4.13.4 Releasing Control of a Computer Screen

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When another presenter requests control of the user's screen (by clicking the Request Control button on the Share pod control strip), the user will see a request message in the upper-right corner of the meeting room window. The user can either click Accept to grant control of your screen to the requesting participant or click Decline to deny control of your screen to the participant.

4.8.4.14 Sharing Documents

A host or presenter can share documents that have been uploaded to the Content library or share documents directly from their computer. If the user turns off sharing, changes the content in a Share pod, or closes the Share pod, the document is still part of the meeting room and can be displayed again. If the user deletes a Share pod, the document is deleted from the meeting room. To edit a shared document, the user must edit the source document and reload it into the meeting.

4.8.4.14.1 Sharing from Content Library

A host or presenter can load presentations, SWF files, JPEG files, MP3 files, or FLV files from the Content library on the server into a Share pod in a meeting. In the Content library, the user can select documents from a shared content folder or from a user folder, either their own or another user's. The Content library is available in the Connect Pro client application.

Library content is shared by doing one of the following:

- In the Share pod, click the Documents button.
- Select Pods > Share from the menu bar.
- Select Share > Documents from the control strip at the bottom of the Share pod.

Then click Select From Content Library on the pop-up menu and select one of the following:

- Shared Content displays uploaded content that is available to all account holders with the appropriate permissions.
- User Content displays uploaded content in individual user folders. To view the content in another user's folder, the user must have View permission from that user.
- My Content displays the uploaded content in the user's user folder.
- Uploaded Content displays the content that has been uploaded for the current meeting.

Select the document to share and click Open. The selected document will appear in the Share pod and the document name will appear in the title bar of the pod.

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4.8.4.14.2 Sharing from Local Computer

The user can load PPT, SWF, JPEG, MP3, or FLV files from their computer into a Share pod. The files are uploaded to the server and any PPT files uploaded are first converted to presentations.

Local files are shared by doing one of the following:

- In the Share pod, click the Documents button.
- Select Pods > Share from the menu bar.
- Click Share on the control strip at the bottom of the pod.

Then click Select From My Computer on the pop-up menu and select the document to share and click Open. The selected document will appear in the Share pod and the document name will appear in the title bar of the pod.

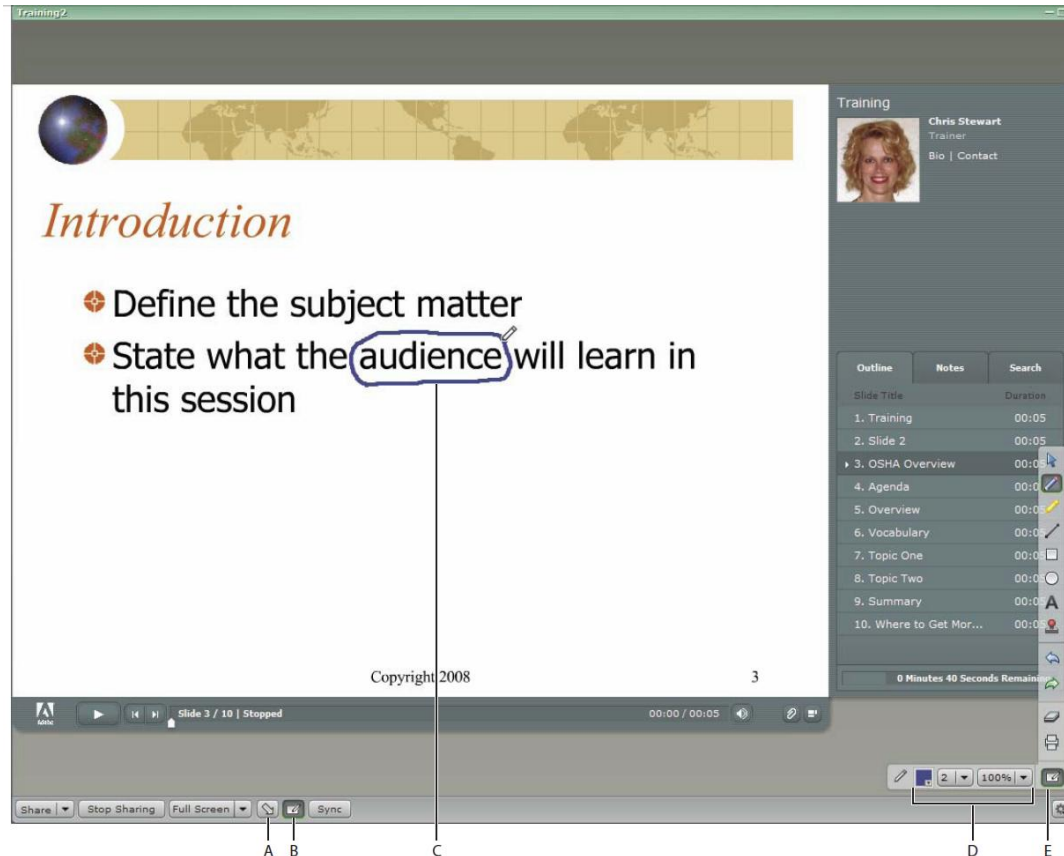
The document is added to the Uploaded Content folder associated with the meeting room in Connect Pro client. A Connect Pro client administrator can move the document to the Shared Content folder in the Content library to make the document available for other meetings.

4.8.4.15 Sharing Whiteboards

A host or presenter (or a participant that has been given rights) can use a whiteboard to create collaborative text, drawings, and other annotations in a meeting. Whiteboards can be used in two different ways in a Share pod. A stand-alone whiteboard allows presenters to create content on a white background. An overlay whiteboard allows presenters to create content over an existing document in a Share pod, adding annotations to and drawing on the document. Whiteboards can be laid over presentations, JPG, SWF, FLV, and FlashPaper documents.

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A. Pointer B. Show/Hide whiteboard overlay C. Annotation added using the Pencil tool D. Whiteboard tool options E. Show/Hide whiteboard tools

Figure 73 - Whiteboard Overlay

4.8.4.15.1 Creating Stand Alone Whiteboards

To create a stand-alone whiteboard in a blank Share pod the user does one of the following:

- In the Share pod, click the Whiteboard button.
- Select Pods > Share.
- Click Share on the control strip at the bottom of the Share pod.

Then select New Whiteboard in the pop-up menu.

4.8.4.15.2 Creating Overlay Whiteboards

To add an overlay whiteboard in a Share pod that is displaying a document the user does one of the following:

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- Clicks the Whiteboard button in the Share pod control strip.
- Clicks the Pod Options button the lower-right corner of the Share pod and selects Whiteboard Overlay.
- If sharing an application, in the upper-right corner of the window of the application, clicks the arrow next to the red Stop Sharing button and select Pause and Annotate.
- If sharing a user's entire desktop, clicks the Acrobat Connect Add-in icon in the system tray (Windows) or icon bar (Macintosh) and select Pause and Annotate.









4.8.4.15.3 Using Whiteboards

To display an existing whiteboard the user selects Pods, then Share and then the whiteboard name.

To clear a whiteboard, the user presses Control+D or presses the Clear icon  in the Whiteboard toolbar.

A stand-alone whiteboard is composed of multiple pages. If the user needs to present multiple whiteboard pages during a meeting, they can use the forward and back arrow buttons on the Whiteboard toolbar to move between pages.

The Whiteboard toolbar contains several tools to create text and drawings on the whiteboard including:

- Selection tool  to select shapes on the whiteboard or an area of whiteboard by creating a selection rectangle around all the shapes to select.
- Pencil tool  to create free-form lines.
- Marker tool  to create free-form thick marker lines.
- Line tool  to draw straight lines between two points.
- Rectangle tool  to create square and rectangle shapes.
- Ellipse tool  to create circle and ellipse shapes.
- Text tool  to create a floating multiline text field.
- Stamper tool  to create a Check Mark, Arrow, Star or Cross shape.

4.8.4.16 File Share Pod

The host and presenters (and participants that have been given rights) can upload files to share with meeting attendees either from their computers or from the Content library. Meeting participants cannot upload files; however, the host can change the participants'

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status to allow them to upload files. Participants who want to upload files should ask the host to change their attendee role or to grant enhanced rights for the File Share pod.

The first step in uploading a file is to make sure the meeting room contains a File Share pod. If the meeting room does not have a File Share pod, click Pods > File Share > New File Share Pod. The file can now be uploaded by click Upload File followed by one of the following:

- Click Select From Content Library and navigate to the folder that contains the file.
- Click Select From My Computer and in the Browse Content window, navigate to the folder that contains the file.

Then select the file and click Open.

Meeting attendees can download files from the File Share pod to their computers. In the File Share pod, the users select the file to download and select Save to My Computer. A browser window opens displaying the Save to My Computer dialog box. The user clicks the Click to Download button and then clicks Save. The next step is to navigate to the desired location and click Save. Click Close when the downloading process is complete.

The label for the file in the File Share pod can be changed by selecting the file to relabel and then clicking Pod Options button in the lower-right corner. Select Rename Selected from the pop-up menu and then type the new name in the Name box and click OK.

Files can be removed from the File Share pod by selecting the file to remove and then click the Pod Options button in the lower-right corner and then selecting Remove Selected from the pop-up menu.

4.8.4.17 Displaying Web Pages

During meetings, hosts or presenters may want participants to view websites. They can use the Web Links pod to cause attendees' browsers to open a designated URL.

The first step in displaying a website to participants is to make sure the meeting room contains a Web Links pod. If the meeting room does not have a Web Links pod, click Pods > Web Links > New Web Links Pod. It is not necessary to type text in the Browse To box; the text is not carried over to the URL name and path boxes in the next step. Then click the Pod Options button in the lower-right corner and select Add Link. Type the URL name and URL path in the text boxes and click OK.

To display a web link to all attendees, select a link in the Web Links pod, or enter a URL in the Browse To box and then click Browse To and a new instance of the Web browser displaying the URL will open on all users' screens.

To rename a web link in the Web Links pod, select a URL name in the Web Links pod. And click the Pod Options button in the lower-right corner. Then select Rename Selected Link from the pop-up menu and type the new name in the URL Name box and click OK.

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To remove a web link from the Web Links pod, select a link in the Web Links pod then click the Pod Options button in the lower-right corner. Select Remove Selected from the pop-up menu.

4.8.4.18 Taking Meeting Notes

Hosts and presenters use a Note pod to take meeting notes that all attendees can see. It remains visible in a Note pod throughout the meeting or until a presenter edits the note or displays a different note. A host can create and display multiple Note pods, each with its own text. A host can remove the Note pod from view, or switch to a different room layout that does not contain that Note pod.



The Note pod can be used in several ways:



- Create a single, persistent note that is visible to attendees during the entire meeting.
- Create multiple notes in a single pod.
- Create multiple Note pods to display different notes.

The contents of a Note pod can be e-mailed.

To create a Note pod, go to the menu bar at the top of the Stage, select Pods > Note > New Note pod, or choose New Note from the Note pod options menu.

A host or presenter can add a note to a Note pod by clicking anywhere inside the Note pod and typing the text to appear in the Note pod.

A host or presenter can create more than one note in a Note pod and choose which note to display by clicking the Pod Options button  in the lower-right corner and selecting New Note from the pop-up menu. They then type note text and click the Pod Options button  and select the Select Note option. Then select the name of the note to display from the pop-up menu.

A host or presenter can edit the text in a Note pod by click anywhere inside the Note pod containing the text to edit. Then they can modify the text. To change the size of the text, click the Pod Options button  in the lower-right corner of the Note pod, and then select Text Size. Select a text size. To change the alignment of the text, click the Pod Options button  in the lower-right corner of the Note pod and choose an alignment option: left, center, or right. All changes are immediately visible to attendees. All the text in a pod uses the same formatting.

When a host or presenter creates a note, it is assigned a default name, such as Note 1 or Note 2. A host can rename a note by double-clicking the note name in the pod and entering a new one. Alternatively, the note name can be changed by going to the menu bar and clicking Pods > Organize Pods and selecting the name of the Note pod to change. Then click Rename, and type a new name.


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A host or presenter can delete a note by clicking Pods > Organize Pod and selecting the name of the note to delete. Then click Delete and Done.

Hosts can e-mail the contents of a Note pod by clicking the Pod Options button  in the lower-right corner and select Email Note.

4.8.4.19 Chat and Q & A in Meetings

A Chat pod can be used to communicate with other attendees while a meeting is in progress. If a user has a question and does not want to disturb the meeting flow, or if they cannot speak in a meeting because sound is not enabled on their computer, the user can send a chat message to the presenters or to another meeting participant. For example, when a user first enters a meeting room, they can introduce themselves by sending a chat message to everyone in the room.

A presenter can use more than one Chat pod simultaneously. Chat pods can be set to display content to everyone or to presenters only. Messages appear in the Chat pod as they are submitted and are listed sequentially in the pod. Presenters can allow participants to conduct private chats, to clear a chat, and to turn off chat notifications.

Chat pod content is persistent and remains in a meeting room until deleted. Chat pod contents can be preserved for future use by e-mailing their content.

A Q & A pod can be used to answer questions posed by attendees. The Q & A pod is linked to the Chat pod. When an attendee asks a question in the Chat pod, a presenter can answer in the linked Q & A pod. When a presenter answers a question, the question and answer appear as pairs in the Chat pod.

4.8.4.19.1 Send a Chat Message

The user composes the chat message and addresses it to a specific participant, to all presenters at the meeting, or to all attendees.

When a user receives a chat message from a meeting participant, their Chat pod shows the sender's name and the message. If the message was sent to everyone, the sender's name is followed by the message. If the message was sent only to the user, the sender's name is followed by "(privately)". If the message was sent only to the presenters, the sender's name is followed by "(presenters)."

To send a chat message, the user first specifies the recipient by selecting one of the following options from the pop-up menu at the bottom of the Chat pod:


- The name of a participant to whom you want to send a message
- Presenters
- Everyone
- Submit Question (available if a Q & A pod is linked to the Chat pod)

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Then the user clicks the text box in the Chat pod and types the message to send and then clicks Send Message button  next to the text box or presses the Enter or Return key on the keyboard.


4.8.4.19.2 Disable Private Chat Messages

The host can prevent two participants from chatting privately by clicking the Pod Options button  in the lower-right corner of the Chat pod and clicking Enable Private Chat For Participants to disable the default option. A check mark indicates when the option is enabled.

4.8.4.19.3 Disable Private Chat Messages

When an empty Chat pod is required in a meeting, a host or presenter can clear all messages for all attendees by clicking the Pod Options button  in the lower-right corner of the Chat pod and selecting Clear Chat.

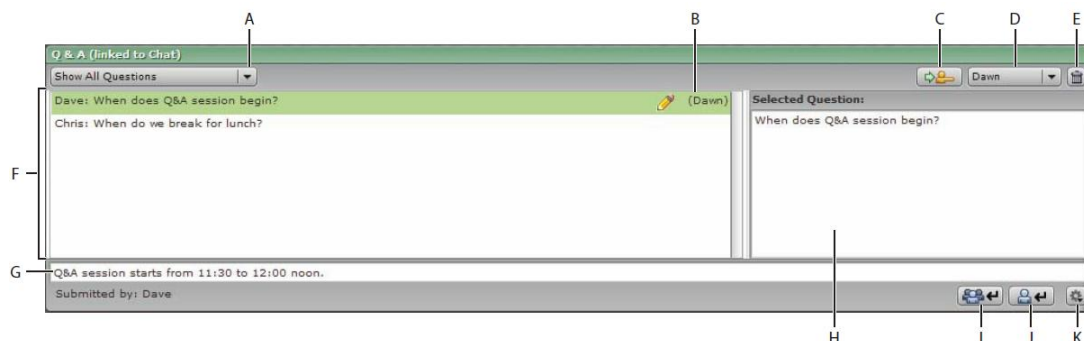
4.8.4.19.4 Email Chat Pod Contents

To email the contents of the Chat pod, click the Pod Options button  in the lower-right corner of the Chat pod and select Email Chat History.

4.8.4.19.5 Q & A Pod

The Q & A pod gives hosts and presenters additional control for managing questions and answers during a meeting. Using this pod, they can redirect a question to the appropriate presenter and place questions in a queue until ready to answer them.

Selecting a question allows the host or presenter to edit the question, enter a reply, and send the answer either to all participants or just the sender. Questions and answers appear as pairs in the Chat (Q & A) pod.



A. Filter options B. Person answering C. Forward D. Presenter list E. Delete question F. Incoming message list G. Answer text box H. Preview pane I. Answer question to everyone J. Answer question to submitter only K. Pod Options

Figure 74 - Q & A Chat pod

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4.8.4.19.5.1 Add a Q & A Pod and Link to a Chat Pod

The host or presenter can add a Q & A pod to a meeting room with an existing Chat pod. The link between the Q & A pod and the Chat pod must be done manually. Once the two pods are linked, (Q & A) is added to the name of the Chat pod. While the Chat pod is in Q & A mode, participants can only send messages to the presenters. There can be a maximum of one Q & A pod in a meeting room.

If the Presenter Only area is not displayed, click Present > Show Presenter Only Area. Click Pods > Q & A. Select the name of the Chat pod to link to the Q & A pod from the pop-up menu and click Link. The Chat pod is now linked to the Q & A pod and (Q & A) is displayed in the Chat pod name.



Figure 75 - Linking Q & A pod to Chat pod

4.8.4.19.5.2 Submit a Question

To submit a question in the Chat pod select Submit Question From the pop-up menu at the bottom of the Chat pod and then enter the message in the text box and click the Send Message (arrow) button or press Return.

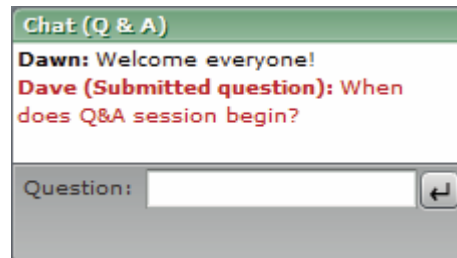


Figure 76 – Participant asks a question

4.8.4.19.5.3 Answer a Question

To answer questions using the Q & A pod select a question from the Incoming Messages list. The question becomes highlighted and a duplicate of the question appears in the Preview pane so that the user can edit it if necessary in the Preview Pane. The user then types the answer in the text box at the bottom of the pod and clicks one of the following buttons in the lower-right corner of the Q & A pod:

- Answer question to everyone  which sends the answer to all meeting attendees.

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- Answer question to submitter only  which sends the answer only to the attendee who sent the question.

When a question is sent, it is deleted from the Incoming Messages list and appears in the Chat pod in the “Answered Questions” list.

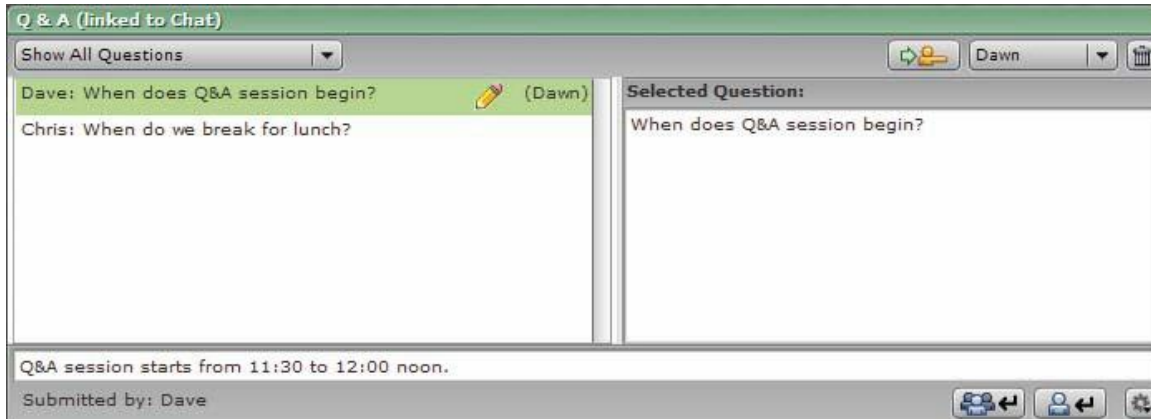


Figure 77 – Presenter answers a question

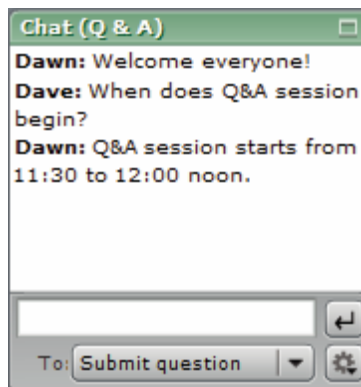



Figure 78 - Question and Answer appear together in Chat pod

4.8.4.19.5.4 Forward a Question

Presenters can forward a question to another presenter to answer by selecting the question from the Incoming Messages list followed by selecting a presenter’s name from the pop-up menu and clicking the Forward Question To Selected Presenter button.

4.8.4.19.5.5 Mark a Question as Open

A presenter can mark a question as open by selecting an unanswered question from the Incoming Messages list in the Q & A pod and then clicking the Pod Options button  in the lower-right corner and selecting Mark as Open.


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4.8.4.19.5.6 Delete a Question

A presenter can delete a question by selecting a question from the Incoming Messages list in the Q & A pod and then clicking the Pod Options button  in the lower-right corner and selecting Delete Question or Delete All Questions.

4.8.4.19.5.7 Show Names with Questions and Answers

To show the submitter name or presenter name in front of the question or answer clicking the Pod Options button  in the lower-right corner of the Q & A pod and select one of the following options:

- Show submitter name with answered question.
- Show presenter name with answered question.

4.8.4.19.5.8 Email the Q & A Pod Contents

To email the contents of the Q & A pod, click the Pod Options button  in the lower-right corner of the Q & A pod and select Email All Questions.

4.8.4.20 Polling Attendees

Hosts can use the Poll pod to create questions, or polls, for participants and to view the results. Only hosts can control poll management and how polls appear to meeting participants. Hosts can also cast votes. Polls are useful during a meeting if you want instant feedback on what is being presented. Polls can also be used at the end of a meeting to find out if participants felt the meeting, content, and presenters were high-quality.

4.8.4.20.1.1 Starting a Poll

To ask participants to respond to a poll, the host first needs to verify that the Poll pod is displayed. If the Poll pod is not displayed, click the Pods menu and select Poll > New Poll Pod. Once the Polls pod is displayed, the host can enter a question into the Poll pod and click Open Poll.

4.8.4.20.1.2 Close Poll Answer Period

To close the answer period for a poll, the host clicks Close Poll at the bottom of the Poll pod.

4.8.4.20.1.3 Edit Poll

To edit a poll, the host clicks Prepare in the lower-left corner of the Poll pod and edits the text and then clicks Open Poll.


4.8.4.20.1.4 View Poll Results

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Hosts and presenters can view poll results. Poll results are updated in real time as participants continue to cast or change their votes. To view the poll results, click the Pod Options button  in the lower-right corner of the Poll pod then select Results Settings and choose an option. The participant names and responses appear in the Poll pod.

4.8.4.20.1.5 Show Poll Results to Participants


The host can show poll results to all meeting participants in one of two ways:

- Click the Pod Options button  in the lower-right corner of the Poll pod and select Broadcast Results from the pop-up menu.
- Scroll to the bottom of the main area and select the checkbox next to Broadcast Results.

4.8.4.20.1.6 Navigate Among Polls

The host can create multiple polls and navigate among them by click the Pod Options button  in the lower-right corner of the Poll pod and choosing Select Poll and select a poll name to switch to.

4.8.4.20.1.7 Clear Poll Answers

The host can clear poll answers by clicking the Pod Options button  in the lower-right corner of the Poll pod and selecting Clear All Answers from the pop-up menu.

4.9 Members

This section provides instructions on how to use the Members portlet to see information about users in a COI. With the Members portlet, user can see information about members of the COI and initiate a chat session with them if they are currently online.

Overview

Users can see information about their fellow COI members in the Members portlet.

Setup

The Members portlet should be placed on the Members sub tab of each COI pages.

Procedure

Navigate to a COI that the user is a member and click the Members sub tab to display the Members portlet.

Functionality

The Members portlet displays a list of all the members of the current COI. A count of the COI members is displayed. If the COI has more members can be displayed on a single

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page, the Members portlet will display paging controls at the bottom of the list to allow the user to go to Next and Previous pages.

The screenshot shows a portlet titled "Members" with a dark blue header. Below the header, it states "This organization has 13 members." The main content area displays a list of five members, each with a placeholder profile picture, their name, email address, and two action links: "Send Alert" and "Chat With [Name]". The members listed are Tina Fretas, Ed Edelbrock, thomas compter, Jan Kunemunda, and Manny Smith. At the bottom of the list, there are "Previous" and "Next" navigation buttons.

Name	Email	Send Alert	Chat With
Tina Fretas	tina@hsin.gd-ais.com	Send Alert	Chat With Tina
Ed Edelbrock	eddy@hsin.gd-ais.com	Send Alert	Chat With Ed
thomas compter	thomas.compter@gd-ais.com	Send Alert	Chat With thomas
Jan Kunemunda	jan@hsin.gd-ais.com	Send Alert	Chat With Jan
Manny Smith	manny@hsin.gd-ais.com	Send Alert	Chat With Manny

◀ Previous | Next ▶

Figure 79 - Members portlet

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The following information is displayed, if available, for each user:

- Image
- Full name
- Job Title
- Email address

Additionally, if the user is online, a message “X is online!”, where X is replaced by the user’s first name, will be displayed.

Clicking the user email address will create a new electronic mail message addressed to the selected user in the user’s default email program.

Clicking on the user’s image or full name displays details about the user in the Directory portlet.

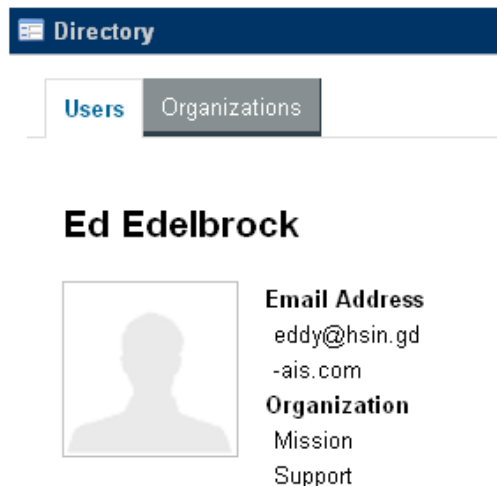


Figure 80 - User Details

“Chat with X”, where X is replaced by the user’s first name, will also be displayed for each member. Clicking on the link will open the Chat client and initiate a chat session with the user in the same manner that a chat session is established between two users from the Chat client Contact List. See the Chat section of this document for details on using the Chat client.

4.10 Message Boards

This section provides instructions on how to use the Message Boards portlet to conduct persistent user discussions about variety topics which COI members can review at any time. With the Message Boards portlet, users can:

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- view and subscribe to discussion threads

Users with the COI Contributor role can also use the Message Boards portlet to:

- add, edit or delete files, messages and subcategories
- reply to messages
- update thread priority

Users with the COI Admin role can additionally:

- add categories
- move thread
- set permissions

Overview

Users can view and participate in message board discussions by utilizing the Message Boards portlet. Discussions, called “threads” in the Message Boards portlet, are grouped into categories.

Setup

Prior to using the Message Boards portlet, a COI Admin user should place the Message Boards portlet on a COI page named Forums.

Procedure

Navigate to a COI that the user is a member of and click the Forums sub tab to display the Message Boards portlet. The initial view of the Message Boards portlet shows the categories containing discussions on a tab named Categories.

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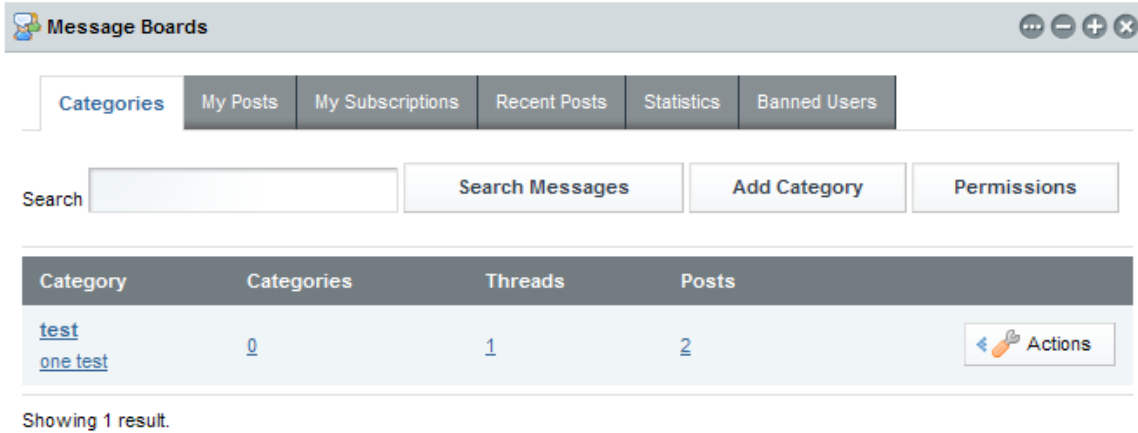


Figure 81 - Message Boards Portlet

Functionality

4.10.4.1 Add Category

Adding a category is done by clicking the Add Category button on the Categories tab of the Message Boards portlet. After clicking the Add Category button, the Add Category page is displayed on which the user can specify the name and a description of the new category. The user can specify custom permissions for the new category by clicking the Configure link next to the Permissions label. After specifying the category name, description and optionally custom permissions, the user clicks the Save button to create the new category.

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[Categories »](#)

Add Category

Name

Description

Permissions [Configure »](#)

Active

Figure 82 - Add Category page

4.10.4.2 Edit Category

Editing a category is done by clicking the Actions button to the right of the category information in the table of categories on the Categories tab of the Message Boards portlet. If the user has Update permission on the category, an Edit item will be displayed on the Actions menu which if clicked will display the Update Category page on which the user can update the name and description of the category as well as select, remove from, or merge with the parent category for this category.

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[Categories »](#)

Update Category

Parent Category Merge with Parent Category

Name

Description

Active

Figure 83 - Edit Category page

4.10.4.3 Subscribe to Category

Subscribing to a category is done by clicking the Actions button to the right of the category information in the table of categories on the Categories tab of the Message Boards portlet. If the user has Subscribe permission on the category, a Subscribe item will be displayed on the Actions menu which if clicked will add the category to the user's subscriptions listed on the My Subscriptions tab of the Message Boards portlet.

4.10.4.4 Delete Category

Deleting a category is done by clicking the Actions button to the right of the category information in the table of categories on the Categories tab of the Message Boards portlet. If the user has Delete permission on the category, a Delete item will be displayed on the Actions menu which if clicked will pop up a dialog asking the user to confirm the category should be deleted. Deleting a category also deletes the message threads and subcategories contained within it.

4.10.4.5 View Category Details

Click on one of the categories in the list on the Categories tab of the Message Boards portlet to display the details of the category. The category details page shows subcategories and threads belonging to the category.

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Categories »

test

Add Subcategory Permissions

Category	Categories	Threads	Posts
Showing 0 results.			

Threads

Post New Thread

Thread	Status	Started By	Posts	Views	Last Post	Actions
Free KFC today		Tim Boss	2	22	Date: 5/15/09 7:15 PM By: Sarah Manager	Actions

Showing 1 result.

Figure 84 - Category Details page

4.10.4.6 Change Category Permissions

Changing a category's permissions can be done by a user with the Permissions permission on the category. Clicking the Permissions button on the category details page will display the Permissions page which allows the user to update which roles can add files, add messages, add subcategories, delete, move threads, set permissions, reply to messages, subscribe to, update, update thread priority and view the category.

4.10.4.7 Add Message Thread

Adding a message thread is done by clicking the Post New Thread button on the category detail page. After clicking the Post New Thread button, the Add Message page is displayed on which the user can specify the subject and body of the new message. The body of the message can be formatted using the toolbar to select font type & size, etc. The user can also specify that the message is a question, should be posted anonymous, be assigned a priority, and assign permissions to the message. Tags can be added to the message to facilitate searching. The user can attach files to the message by clicking the Attach Files button. The user can preview the message before it is added to the category by clicking the Preview button. Clicking the Save button will add the message to the category so other users with view access to the category can read it.

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[Categories](#) » [test](#) »

Add Message

Subject

Body

Mark as a Question

Anonymous

Priority

Tags Or

Permissions [Configure](#) »

Figure 85 - Add Message Thread

4.10.4.8 Viewing Threads and Messages

The category details page displays a table of the threads in the category. The category named “test” has its details displayed in the figure below. The “test” category currently has one message thread named “Free KFC today”.

[Categories](#) [My Posts](#) [My Subscriptions](#) [Recent Posts](#) [Statistics](#) [Banned Users](#)

[Categories](#) »
test

Category	Categories	Threads	Posts
----------	------------	---------	-------

Showing 0 results.

[Threads](#)

Thread	Status	Started By	Posts	Views	Last Post	Actions
Free KFC today		Tim Boss	2	22	Date: 5/15/09 7:15 PM By: Sarah Manager	

Showing 1 result.

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Figure 86 - Category details

Clicking on the thread will display the messages in the thread as in the figure below. The “Free KFC today” thread currently has one message from the user Tim Boss.

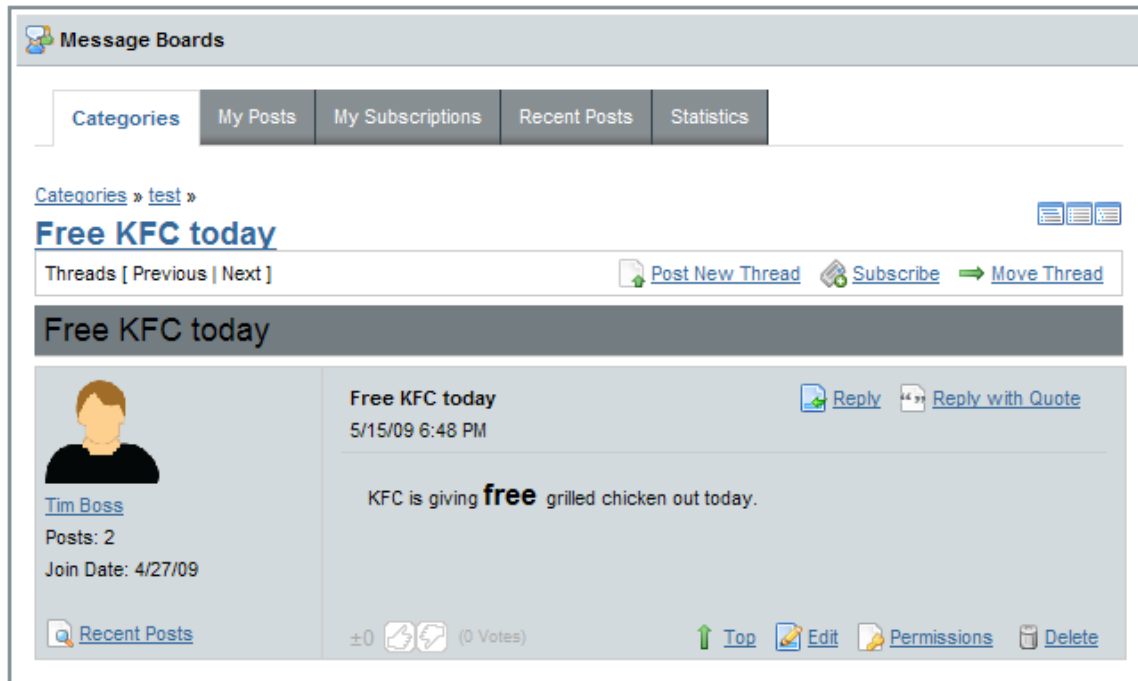



Figure 87 - Thread Messages

4.10.4.9 Reply to Message

Clicking the Reply link  Reply in the message will display the Add Message page with the Subject prefilled with the value RE: prefaced to the subject of the message the user is replying to. The user enters information just like when adding a new message thread. The message that is being replied to is displayed at the bottom of the page below the Save, Attach Files, Preview and Cancel buttons. Clicking the Save button will add the reply to the category as seen in the figure below.

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The screenshot displays a web interface for a message board. At the top, there is a navigation bar with tabs for 'Categories', 'My Posts', 'My Subscriptions', 'Recent Posts', and 'Statistics'. Below this, the current category is 'test'. The main thread title is 'Free KFC today'. A list of threads is shown, with the first one being 'Free KFC today' by Tim Boss on 5/15/09 at 6:48 PM. The second thread is a reply by Sarah Manager on 5/15/09 at 7:15 PM. The main content area shows the post by Tim Boss: 'KFC is giving **free** grilled chicken out today.' Below this is a reply by Sarah Manager: 'The local store ran out of chicken so the offer is no longer valid.' The interface includes user avatars, names, post counts, join dates, and various action links like 'Reply', 'Reply with Quote', 'Top', 'Edit', 'Permissions', and 'Delete'. There are also icons for voting and a 'Recent Posts' link.

Figure 88 - Message Thread with Reply

4.10.4.10 Edit Message Thread

Editing a message thread once it has been added to a category can be done by either the message creator or a COI Admin user. Clicking the "Edit" link  [Edit](#) in the message will display the Update Message page which allows the user to update the message subject, body, tags and file attachments.

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4.10.4.11 Subscribe to Message Thread

Subscribing to a message thread is done from the category details page by clicking the Actions button to the right of the thread information in the table of threads on the Categories tab of the Message Boards portlet. Selecting Subscribe from the Actions menu will add the thread to the user's subscriptions listed on the My Subscriptions tab of the Message Boards portlet.

4.10.4.12 Change Message Thread Permissions

Changing a message thread's permissions once it has been added to a category can be done by either the message creator or the COI administrator. Clicking the Permissions link  [Permissions](#) in the message will display the Permissions page which allows the user to update which roles can delete, set permissions, subscribe, update and view the message.


4.10.4.13 Delete Message Thread

Deleting a message thread can be done by either the message creator or the COI administrator. Clicking the Delete link  [Delete](#) in the message will pop up a dialog asking the user to confirm the message thread should be deleted from the category.

4.10.4.14 Move Thread

Moving a message thread from its current category to another category is done by clicking the Actions button next to a thread and selecting the Move Thread item. This will display a page for the user to select a new category to contain the thread.

4.10.4.15 Split Thread

Splitting a message from a thread can be done by clicking the Split Thread link  [Split Thread](#) in the message which will display a page asking the user to confirm that a new thread should be created for the message.

4.10.4.16 Search Messages

A user can perform a keyword search for message threads by entering search terms in the Search box on the Categories tab of the Message Boards portlet and then pressing the Search Messages button.

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Search « Back

chicken Search Messages

#	Category	Message	Thread Posts	Thread Views	Score
1.	test	RE: Free KFC today	2	24	★★★★★★

Showing 1 result.

Figure 89 - Message Search results

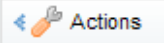
4.10.4.17 Viewing & Modifying User's Posts

A user can see all posts they have made by clicking the My Posts tab of the Message Boards portlet. Click the post to view the details of the thread it was posted to.

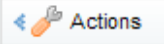
4.10.4.18 Viewing & Modifying Subscriptions

A user can view and modify their subscription to categories and threads by clicking the My Subscriptions tab of the Message Boards portlet. Click the category or thread in the tables to view their contents. Unsubscribe from a category or thread by clicking the Actions button to the right of it and selecting Unsubscribe from the Actions menu.

Categories My Posts **My Subscriptions** Recent Posts Statistics Banned Users

Category	Categories	Threads	Posts	
test	0	1	2	
one test				

Showing 1 result.

Thread	Started By	Posts	Views	Last Post	
Free KFC today	Tim Boss	2	22	Date: 5/15/09 7:15 PM By: Sarah Manager	

Showing 1 result.

Figure 90 - Subscriptions page

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4.10.4.19 RSS Feeds

Several RSS feeds can be obtained from the Message Boards portlet so the user can monitor category or thread activity in an RSS Reader such as the RSS portlet. To obtain the RSS information for an item to watch, select the RSS item from the Action menu next to the item to monitor.

4.10.4.20 Ban User

A user with the Ban User permission (typically a COI administrator) can ban users by clicking the Ban this User link  [Ban this User](#) under the user's information displayed next to thread messages. After a user is banned, this link will be renamed Unban this User and the user's name will appear in a table on the Banned Users tab of the Message Board portlet. A user can be unbanned by clicking the Unban this user link  [Unban this User](#) in either the list of users in the table on the Banned Users tab of the Message Board portlet or under the user's information displayed next to a thread message added by the user prior to being banned.

4.11 News / RSS

This section provides instructions on how to use the RSS portlet to read an aggregated collection of recent articles collected from multiple sources to present current and relevant information to individual users as well as to members of COIs.

The content displayed in the RSS portlet summaries articles from internet sites that the RSS portlet has been configured to subscribe to. The summary information generally contains the title of the article with a hyperlink to the full article on the source web site. The summary information might also contain brief text describing the article, a fragment of text from the article, or multimedia such as pictures from the article.

Within a user's private pages, the user can add and remove subscriptions to various sources of articles. Within the COI pages, only users in the COI Admin role can add and remove subscriptions.

Overview

The RSS portlet can be found on the HSIN NextGen Welcome page, COI Welcome pages, as well as the individual user's My Home Welcome page. Each instance of the RSS portlet is uniquely configured to subscribe to various web sites that offer themselves as RSS content providers.

Setup

A user with the COI Admin role will add one or more RSS sources to each COI instance of the RSS portlet so that COI members can see articles.

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Procedure

Use the RSS portlet from the Welcome page of the HSIN NextGen system, COI or navigate to the user's My Home and click on the Welcome sub tab.

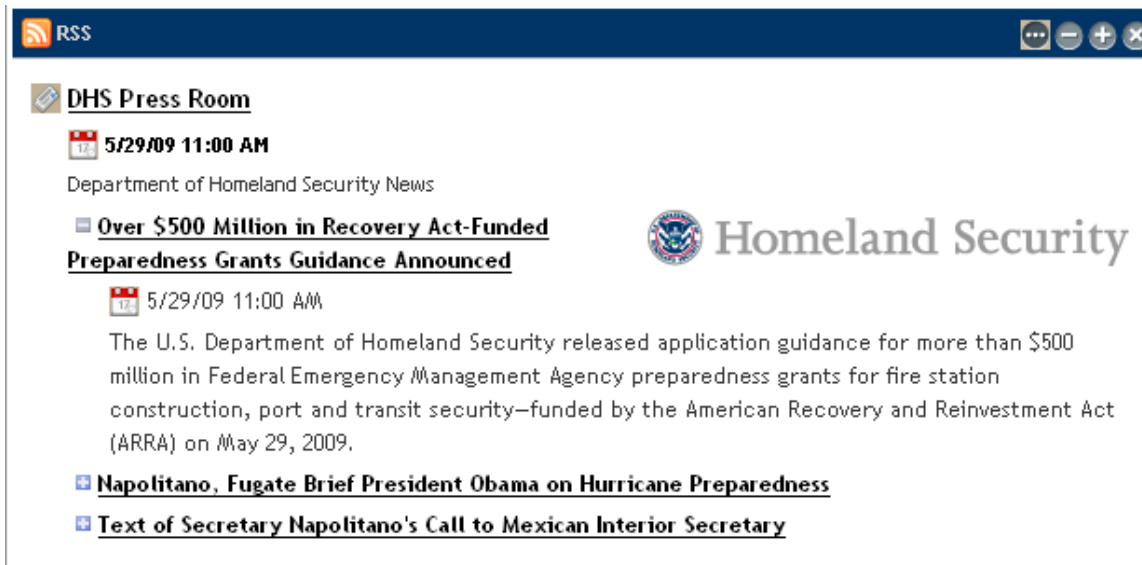



Figure 91 - RSS portlet


Functionality



The RSS portlet will show an  icon in its upper right corner if the user has permission to configure the portlet. For non-administrative users, this is usually only available on the RSS portlet displayed on their private Welcome page.

4.11.4.1 Read News Articles

The RSS portlet displays a listing of articles which the user can access by clicking the link. After clicking an article's link, a new Web browser window opens which will contain the content of the article.

4.11.4.2 Add and Remove News Subscriptions

To add or remove an RSS news source for the RSS portlet, click the  icon and select Configuration from the menu. The configuration page will display with the Setup tab selected by default.

The Setup / Current tab displays a list of URLs of RSS sources that the RSS portlet is currently subscribed to. To add an additional RSS source, click the  icon to add a new row in which to enter the Title (optional) and URL for the RSS news feed. To remove an RSS source from the list the user clicks the  icon to the right of its entry.

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Click the Save button on the configuration page to save changes to the subscription list.

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Current Archived

Title: DHS Press Room URL: http://www.dhs.gov/feeds/press_room.xml

Show Feed Title

Show Feed Published Date

Show Feed Description

Show Feed Image

Show Feed Item Author

of Entries Per Feed: 3

Feed Image Alignment: Right

Header Web Content: [Select] [Remove]

Footer Web Content: [Select] [Remove]

Save

Figure 92 - RSS portlet Configuration page

4.12 Polls & Polls Display

This section provides instructions on how to use the Polls Display portlet to ask a question of users and tally their responses. Multiple instances of the Polls Display portlet can be deployed in the HSIN NextGen system to ask multiple questions at the same time.

Overview

Users with the COI Admin role can create questions and set of possible responses for users to choose from if they wish to participate in the poll. All users who participate in a poll can see a summary of the current voting activity as long as the question remains posted in the Polls Display portlet.

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Users with the COI Admin role can view the voting summary, which includes the individual voting record for a question, as long as the question has not been deleted, even if it is no longer displayed in an instance of the Polls Display portlet.

Setup

After the Polls Display portlet is added to a COI page, the COI Admin user configures it to display a question. Before the question can be selected, the question and its set of possible responses must be created within the Polls page of the Control Panel.

Procedure

Navigate to a COI page which will display the Polls Display portlet containing a question and set of choices from which the users can respond.

Functionality

4.12.4.1 Create Poll Question and Responses

Creating a question and its set of responses is done from the Control Panel for the COI. After navigating to a page in the COI, an COI Admin user can access the Control Panel by clicking the menu labeled “Welcome UserX” (where “UserX” is replaced with the user’s name) in the upper right corner of the web page banner. Then click the Control Panel item in the menu to display the Control Panel. Next select the Polls item under the Content category to display the Polls page.



Figure 93 - Control Panel Polls page

To create a new question, click the Add Question button on the Polls page to display the form on which the user can enter the Title, Description, Expiration Date, and Choices for the question as seen in the diagram below.

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The screenshot shows the 'Add Question' form in the Polls application. At the top, there is a 'Polls' header with a menu icon. Below it is a 'Question' tab and a 'Back' button. The form contains the following elements:

- Title:** A text input field with a yellow highlight.
- Description:** A large text area for the question text.
- Expiration Date:** A date picker set to June 22, 2009, at 10:00 PM. A checkbox labeled 'Never Expire' is checked.
- Choices:** Two input fields labeled 'a.' and 'b.' for user responses. An 'Add Choice' button is to the right.
- Permissions:** A link labeled 'Configure' next to the 'Permissions' label.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Figure 94- Add Question form

The Title of the Question should be unique to aid finding it when configuring the Polls Display portlet. The Description is the actual question to ask the users in the poll. The Expiration Date is the deadline for accepting user responses. The question creator can specify that the question never expires by checking the box to the left of the Never Expire label. This enables a question to be responded to by users as long as it is displayed in the Polls Display portlet. The Choices are the responses users participating in the poll can choose from. Enter the first two responses to the right of the a. and b. labels. To provide additional choices, click the Add Choice button to add choices c, d, etc. If additional choices are added, a Delete button will be displayed next to them which allow them to be removed.


The question creator can click the Configure link to the right of the Permissions label to specify who can vote, delete the question, set permissions on the question, update the question, and view the question. The user clicks the Save button to create the question.

The Polls page will display the newly created question in a table on the Polls page of the Control Panel. The question's title, # of Votes cast, date of most recent vote, and expiration date are displayed. The user can return to the Polls page of the Control Panel to monitor, edit, delete and set permissions on the question.

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4.12.4.1 Make Poll Available to Users

The Polls Display portlet displays a question and possible responses to users to select from. After the Polls Display portlet has been added to a COI web page, an COI Admin user can configure it to display a question to the users by clicking the Edit Control  in the upper right corner of the Polls Display portlet and selecting the Configuration menu item. The Current sub tab of the Setup tab will display a selection list next to the Question label from which the user can select the question title to display in the Polls Portlet. Click the Save button after selecting the desired question's title from the selection list to the right of the Question label. Then click the Return to Full Page link in the upper right corner to return to the Polls Display portlet showing the selected question and choices.

4.12.4.2 Respond to Poll

The Polls Display portlet displays a question and possible responses to users. If the user has not already responded to a poll question, they can select one of the provided choices and click the Vote button. After casting their vote, the user will not be allowed to vote on the same question again.

4.12.4.3 View Poll Results

All users who have voted in a poll can see the current count and percentage of votes for each choice by viewing the Polls Display portlet instance. If the Polls Display portlet instance has been removed from the COI page or configured to display a different question, the poll results can be viewed from the COI Control Panel's Polls page until the question has been deleted.

4.12.4.4 View Poll Summary & Individual Votes

COI Admin users can view summary and individual user voting information from the Polls page of the COI's Control Panel. After navigating to a page in the COI, a COA Admin user can access the Control Panel by clicking the menu labeled "Welcome UserX" (where "UserX" is replaced with the user's name) in the upper right corner of the web page banner. Then click the Control Panel item in the menu to display the Control Panel. Next select the Polls item under the Content category to display the Polls page.

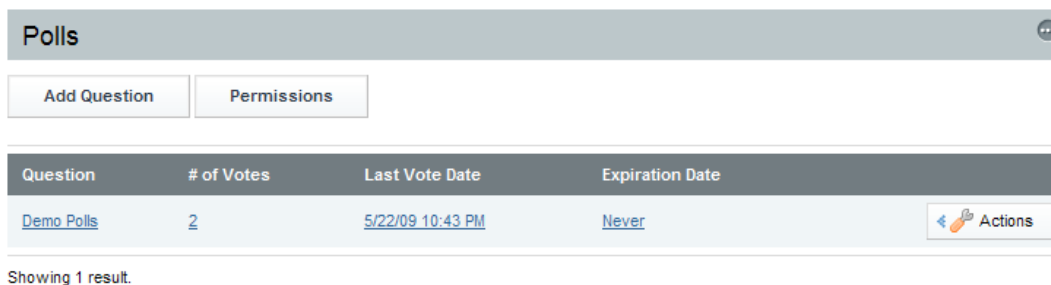


Figure 95 - Control Panel Polls Item with a Question

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The table will display a row for each question containing the title of the question, the number of votes it received, the date and time of the last vote cast, and the expiration date of the question. Clicking any value in the row will display a detailed view of the question which includes the actual question text, the number of votes the question received, and a table summarizing how many votes and what percentage of the total votes each choice received.

Polls

Demo Polls
Do you think the Polls functionality is any good?

%	Votes	
50%	1	a. Yes
50%	1	b. No
0%	0	c. Maybe

Total Votes: 2

Charts: [Area](#), [Horizontal Bar](#), [Line](#), [Pie](#), [Vertical Bar](#)

Actual Votes

User	Choice	Vote Date
Admin User	a. Yes	5/22/09 10:42 PM
Bill User	b. No	5/22/09 10:43 PM

Showing 2 results.

[Back](#)

Figure 96 - Question Details

The detailed view of the question also contains a table of the individual votes, which each row showing the name of the user, the choice selected by the user, and the time and date the user cast their vote.

4.12.4.5 Edit Question

COI Admin users can edit a question and the set of responses from the Polls page of the COI's Control Panel. After navigating to a page in the COI, a COI Admin user can

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access the Control Panel by clicking the menu labeled “Welcome UserX” (where “UserX” is replaced with the user’s name) in the upper right corner of the web page banner. Then click the Control Panel item in the menu to display the Control Panel. Next select the Polls item under the Content category to display the Polls page.

To edit a question, click the Actions button to the right of the question displayed in the table and select the Edit menu item. A form will be displayed which looks and acts identical to the form from which the question was created. The user can modify any of the information on the form including the question title, description, expiration date and choices. The text of choices can be changed and additional choices can be added. Removing choices is not allowed once they have been saved to a question. Clicking Save updated the details of the question.

4.12.4.6 Delete Question

COI Admin users can delete a question from the Polls page of the COI’s Control Panel. After navigating to a page in the COI, an authorized user can access the Control Panel by clicking the menu labeled “Welcome UserX” (where “UserX” is replaced with the user’s name) in the upper right corner of the web page banner. Then click the Control Panel item in the menu to display the Control Panel. Next select the Polls item under the Content category to display the Polls page.

To delete a question, click the Actions button to the right of the question displayed in the table and select the Delete menu item. The deletion will happen immediately, without a request for confirmation from the user, even if an instance of the Polls Display portlet is currently configured to display the question being deleted.

4.13 Surveys (Content Rating)

This section provides instructions on how to use the Page Ratings portlet to rate the content displayed on individual pages and to see the average rating for the page.

Overview

The Page Ratings portlet allows users viewing a page to rate the content of the page on a scale of 1 to 5 stars. The Page Rating portlet also displays the count of users who have rated the content and the average page rating for the page.

Setup

A COI Admin user places an instance of the Page Ratings portlet on COI pages that they want to allow users to rate.

Procedure

Navigate to the COI page containing the Page Rating portlet.

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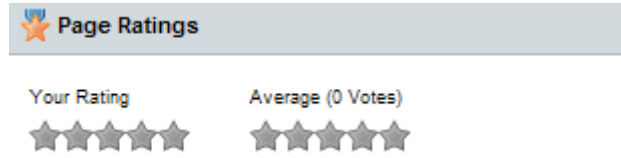


Figure 97 - Page Ratings portlet

Functionality

After reading the content of a COI page the user clicks one of the stars displayed under the Your Rating label in the Page Ratings portlet to provide their rating of the content of the COI page. To give the page the lowest rating, 1 star, the user would click the left most star. To give the page two stars, the user would click the star second from the left. To give the page a medium rating of 3 stars, the user would click the middle star under the Your Rating label. To give the content a rating of 4 stars, the user would click the second star from the right under the Your Rating label. To give the content the highest rating of 5 stars, the user would click the right most star under the Your Rating label.

A count of the number of users who have rated the page content is displayed next to the Average label. The average rating for the page content is displayed under the Average label.

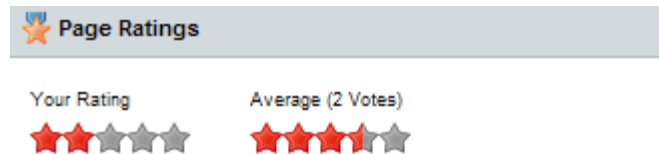


Figure 98 - Page Ratings portlet after two users have rated page content

4.14 Survey Forms

This section provides instructions on how to use the Web Form portlet create and display survey forms for users to fill out.

Overview

The Web Form portlet allows COI Admin users to create survey forms for users to fill out. The form data entered can be emailed and / or stored in the system database, which can then be exported to a comma separated values (csv) file for import into tools such as Microsoft Excel.

Setup

A COI Admin user places an instance of the Web Form portlet on COI pages that they want to display a survey form for users to enter data.

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Procedure

Navigate to the COI page containing the Web Form portlet.

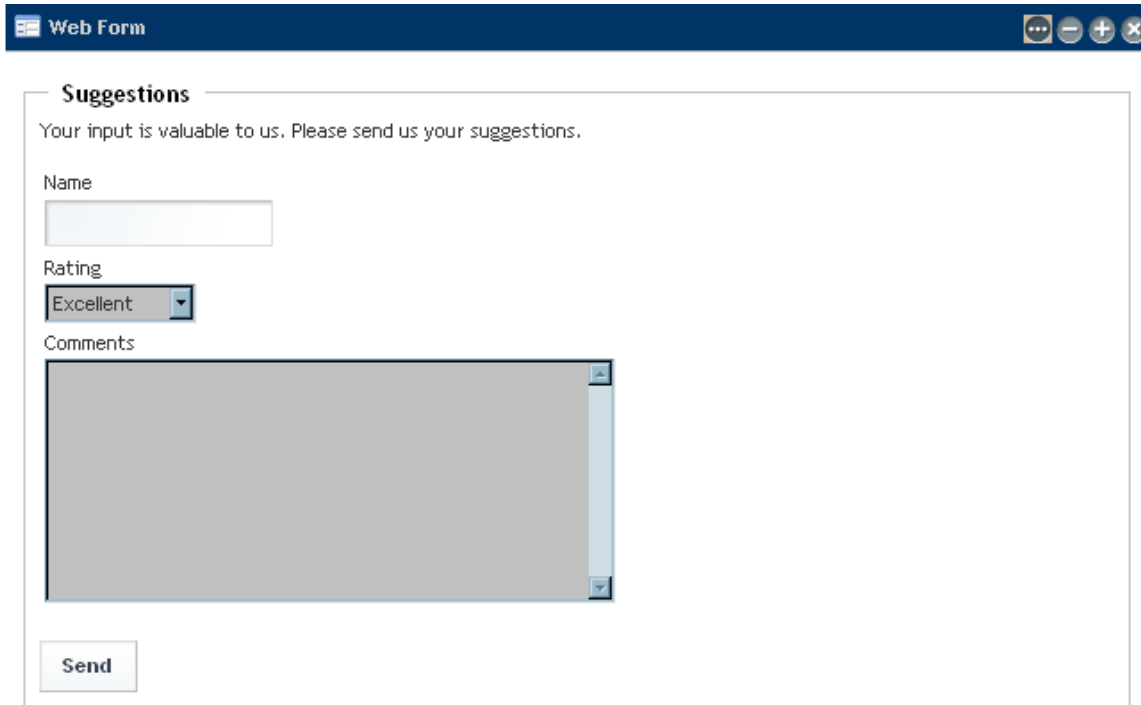



Figure 99 - Web Form portlet displaying a simple survey of user's suggestions

Functionality

After placing the Web Form portlet on a COI page, a survey form is created to display for users to complete if they choose. Completed survey form data can be exported if the portlet has been configured to store survey form data in a database.

4.14.4.1 Create Survey Form

A COI Admin user can click the edit control icon  in the upper right corner of the Web Form portlet and select Configuration to configure the survey form that will be displayed to users. A title and description of the survey form will be shown in the Form Information area of the General sub tab of the Setup tab's Current sub tab. The user can edit the values under the Title and Description labels to update their values. These values will be displayed at the top of the survey form the users fill out.

The General sub tab also displays a Handling of Form Data area to specify if the form data should be sent as email (and what email address to send it to) and / or persisted in the portal's database. Select the checkbox to the right of the Send as Email label to send form data to the email address specified below the Email Address label. Select the

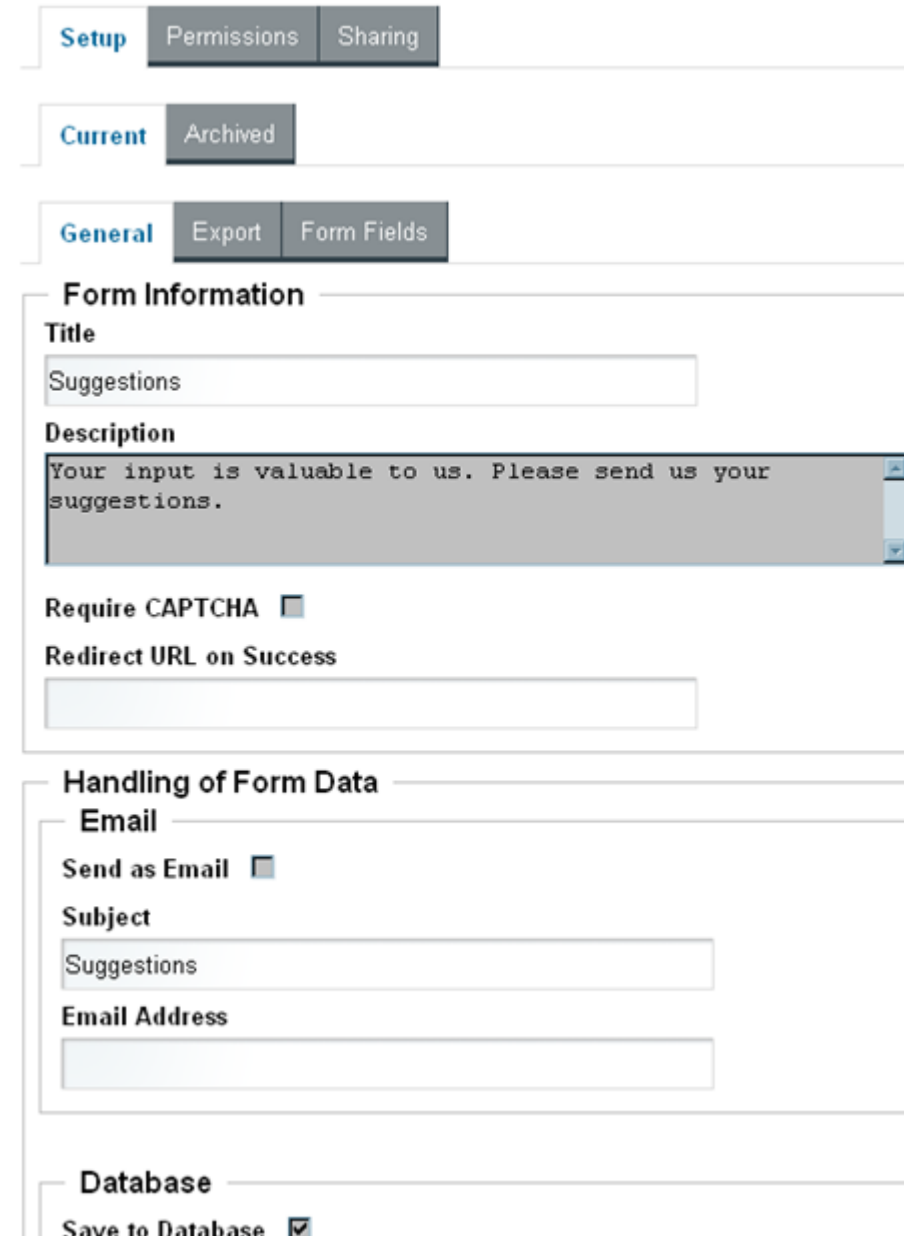
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checkbox to the right of the Save to Database label to persist form data to the portal's database.



Setup Permissions Sharing

Current Archived

General Export Form Fields

Form Information

Title
Suggestions

Description
Your input is valuable to us. Please send us your suggestions.

Require CAPTCHA

Redirect URL on Success

Handling of Form Data

Email

Send as Email

Subject
Suggestions

Email Address

Database

Save to Database

Figure 100 - Web Form Setup General page



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Click on the Form Fields sub tab of the Setup tab's Current sub tab to see the current items that will be displayed on the survey form. If the survey already has data associated with it (meaning one or more users have completed the survey form), then the Web Form portlet will display a message indicating that there is already existing form data which will need to be exported and deleted prior to making changes in the form fields. See the Export Survey Data and Delete Survey Data sections below for instructions on exporting and deleting data.

If there is no existing form data, each form field item will have a name which will be displayed next to the form field, a type which determines the type of data entry field for the user to enter their data for the item, and a checkbox to indicate the item is optional. A form item can be removed by clicking the delete icon  to its right. An additional form item can be added to the form by clicking the add icon  to the right of the item that the new item should appear below.



Web Form [Return to Full Page](#)

Setup Permissions Sharing

Current Archived



General Export **Form Fields**

Name



Name Type Optional  

Rating

Name Type Optional

Options
(Add options separated by commas.)
  

Comments

Name Type Optional  

Save Cancel

Figure 101 - Web Form Setup Form Fields page

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There are six types of form fields supported by the Web Form portlet:


- Text: displays a single line text field for the user to enter text.
- Text Box: displays a multi line text area for the user to enter text.
- Options: displays a drop down selection list for the user to select one item. Selecting this type of form field will display an additional text field titled Options on the Form Fields page. The form creator specifies the items to appear on the selection list by entering them, comma separated, in the text field below the Options label.
- radiobuttons: displays a list of options for the user to select one item similar to the Options type, except instead of a drop down selection list, the list of options will all be displayed at the same time with a radio button to the left of their value. The user clicks one of the radio buttons to specify their selection.
- Paragraph: displays read only text in the form. This type of form field does not have a name (label) associated with it. This type of form field is useful for adding instructions to a form.
- checkbox: displays a checkbox to the left of the form field name on the form. The user can check or uncheck the box.

After configuring the form fields, the user clicks the Save button at the bottom of the page to save the changes, then clicks the Return to Full Page link in the upper right corner of the Web Form portlet to exit the Configuration mode of the portlet and return to the normal mode of the portlet which will display the survey form.

4.14.4.2 Complete Survey Form

Users complete a survey form by navigating to the COI page which contains the Web Form portlet containing survey then enter data into the form and click the Send button displayed at the bottom of the survey form. If the user has entered data in all the required fields, a message is displayed informing the user that their form information was sent successfully and the form is redisplayed without any of the information the user entered, allowing the user to enter data and resubmit the form again if they wish.

4.14.4.3 Export Survey Data

To export form data submitted by users, a COI Admin user clicks the edit control icon  in the upper right corner of the Web Form portlet and selects Configuration. Then the user clicks the Export sub tab of the Setup tab's Current sub tab. Then the user can click the Export Data button to generate a comma separated values (csv) file containing the submitted form data. The Web browser will typically popup a dialog window asking the user to open the file (named Suggestions.csv) or to save the file to some location on the user's local computer.

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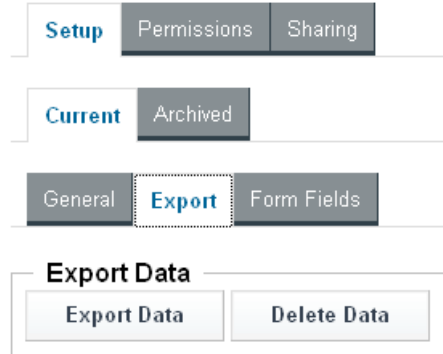



Figure 102 - Web Form Export Data page

The exported data, if opened in a spreadsheet application such as Microsoft Excel, will be displayed in a table with the name of the form field at the top of each column and each form submission as a row below the column titles. If no form data was submitted by users, the only row displayed in the table will be the row containing the column headers.

4.14.4.4 Delete Survey Data

It is advisable to export submitted form data prior to deleting it since data deletion is permanent and there is no way to undo the deletion. See the Export Survey Data section above for the procedure to export data.

To delete form data submitted by users, a COI Admin user clicks the edit control icon  in the upper right corner of the Web Form portlet and select Configuration. Then the user clicks the Export sub tab of the Setup tab's Current sub tab. Then the user can click the Delete Data button to immediately delete all submitted data. The user will not be prompted to confirm the deletion.

4.15 Tasks

This section provides instructions on how to use the Task List portlet to track ad-hoc tasks to be performed by COI members. With the Task List portlet, users can:

- view tasks
- create tasks
- edit, reassign or complete tasks assigned to them
- edit, reassign, complete, or delete tasks created by them

COI Admin users can view, edit, reassign, complete, or delete all tasks.

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Overview

All tasks are visible to all members of the COI, independent of to whom they are assigned. All COI members can create new tasks and assign them to COI members. Tasks can be updated or completed by their assignees or by the user that created them. Tasks can be deleted by the users that created them. COI Admin users can edit, complete, or delete any task.

Setup

COI Admin users should add the Task List portlet to a sub tab page in the COI.

Procedure

Navigate to the COI Tasks sub tab page to use the Task List portlet.

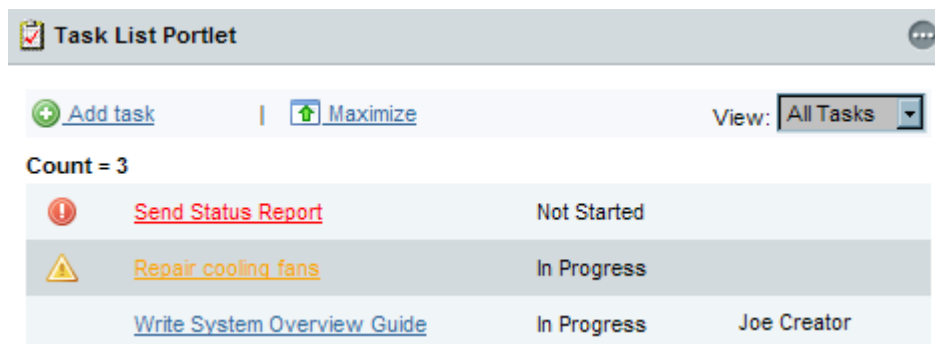


Figure 103 - Task List portlet

Functionality

The Task List portlet will show an icon in its upper right corner if the user has permission to configure the portlet. Configuring the portlet is reserved to users in the COI Admin role. The following functionality can be performed by general users.

4.15.4.1 Task List

The Task List portlet displays a listing of ad-hoc tasks for the COI ordered by their due date. Uncompleted tasks that are due today have their title colored orange and display an icon to the left of their title. Uncompleted tasks that are overdue have their title colored in red and display an icon to the left of their title.

The user can apply a filter to the list of tasks by selecting one of the filters from the View selection at the top right corner of the task list.

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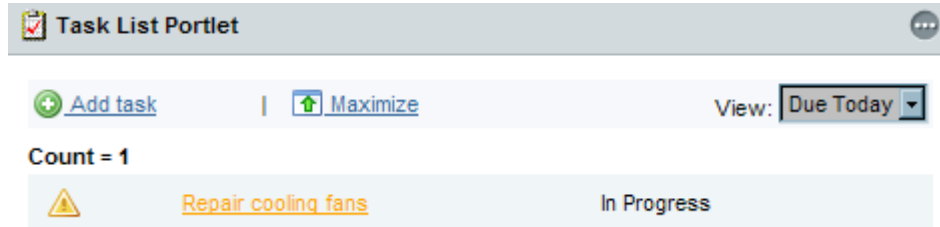


Figure 104 - Task List with Due Today filter

Clicking the Maximize button will expand the Task List portlet to occupy all the space in the Web browser and display additional information about each task in the list. The Task List portlet can be left in the maximized mode or returned to the normal mode by clicking the Return to Full Page link at the top right corner of the portlet.

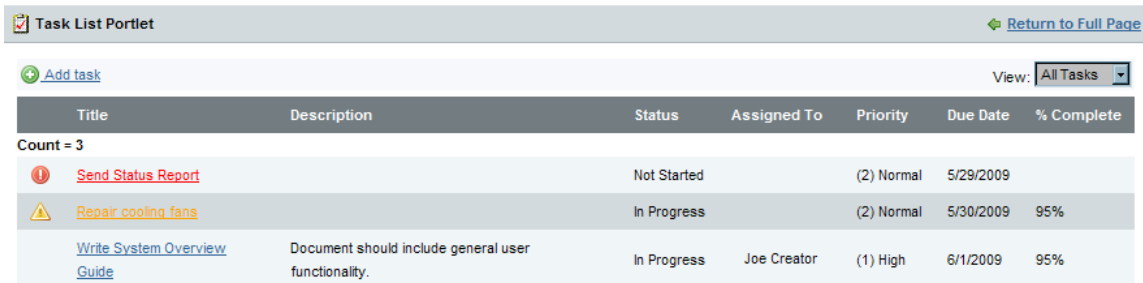


Figure 105 - Task List Maximized

4.15.4.2 View Task Details

Clicking the title of a task in the task list will display details about the task. Clicking the Close button at the bottom of the task details display goes back to the task list display.

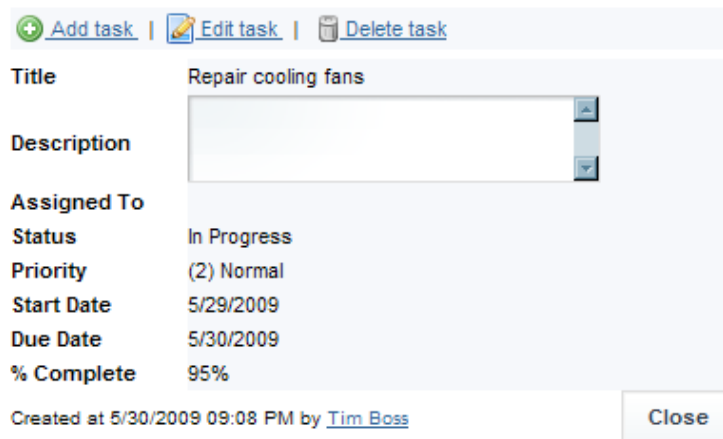



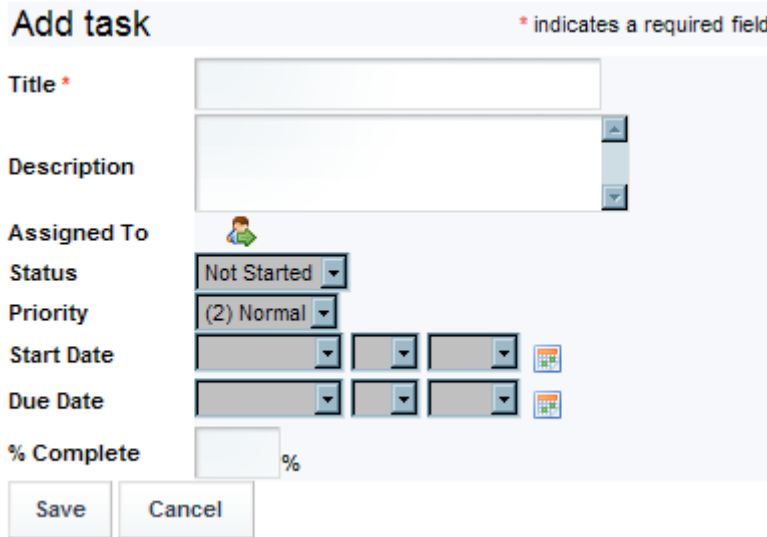
Figure 106 - Task Details

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4.15.4.3 Create Task


A new task can be created by clicking the Add Task link or the  icon on the task list or task details display which will cause the Add task page to be displayed. The user enters information about the task on the Add tasks page such as Title, Description, Assigned To, Status, Priority, Start Date, Due Date and % Complete. All tasks must have a title specified, but the other information is optional.



Add task * indicates a required field

Title *

Description

Assigned To 

Status Not Started

Priority (2) Normal


Start Date

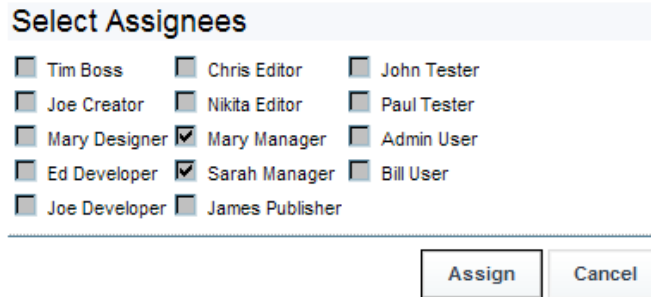
Due Date

% Complete %

Save Cancel

Figure 107 - Add Task

Click the  icon to the right of the Assign To label to assign one or more COI members to the task. Select the checkbox to the left of one or more COI member names and click the Assign button to select assignees for the task.



Select Assignees

Tim Boss Chris Editor John Tester

Joe Creator Nikita Editor Paul Tester

Mary Designer Mary Manager Admin User

Ed Developer Sarah Manager Bill User

Joe Developer James Publisher

Assign Cancel


Figure 108 - Select Task Assignees

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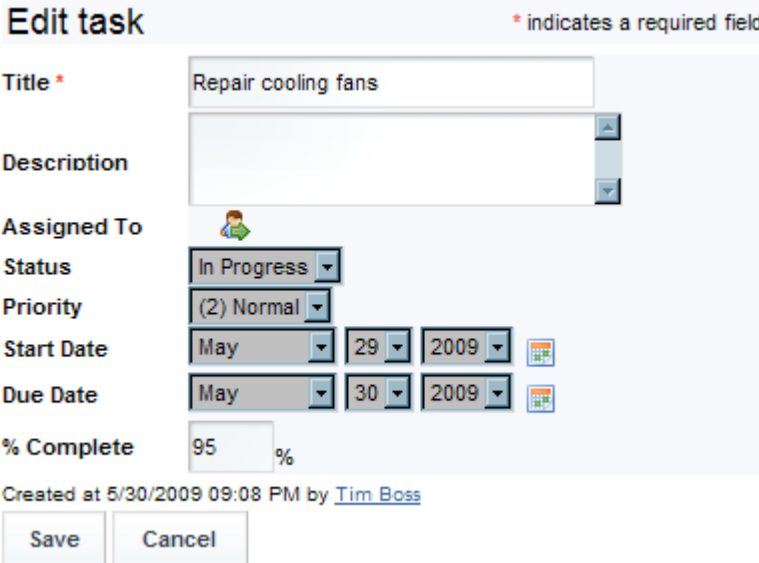
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Specifying start and due dates can be done by clicking the  icon to display the calendar tool or by selecting the month, day of the month and year from the selection boxes to the right of the Start Date and Due Date labels.

Click the Save button to add the new task and return to the task list display.

4.15.4.4 Edit Task


To edit a task, click the Edit Task link or the  icon on the task details display. The user can update any information about the task on the Edit task page such as Title, Description, Assigned To, Status, Priority, Start Date, Due Date and % Complete in the same manner the task information was added to the task when the task was created.



Edit task * indicates a required field


Title * Repair cooling fans


Description

Assigned To 

Status In Progress

Priority (2) Normal

Start Date May 29 2009 

Due Date May 30 2009 

% Complete 95 %



Created at 5/30/2009 09:08 PM by [Tim Boss](#)

Save Cancel

Figure 109 - Edit Task

Click the Save button on the Edit task page to save changes to the task or the Cancel button to discard changes to the task. The details page for the task is displayed after clicking either the Save or Cancel buttons.

4.15.4.5 Reassign Task

A task is reassigned by clicking the Edit Task link or the  icon on the task details display and then clicking the  icon to the right of the Assign To label to display the Select Assignees page. Unselect the checkbox to the left of any COI members whom should no longer be assigned to the task. Select the checkbox to the left of any COI members whom should be assigned to the task. Click the Assign button when the desired COI members have been selected and then click the Save button on the Edit task page to save the changes to the task.


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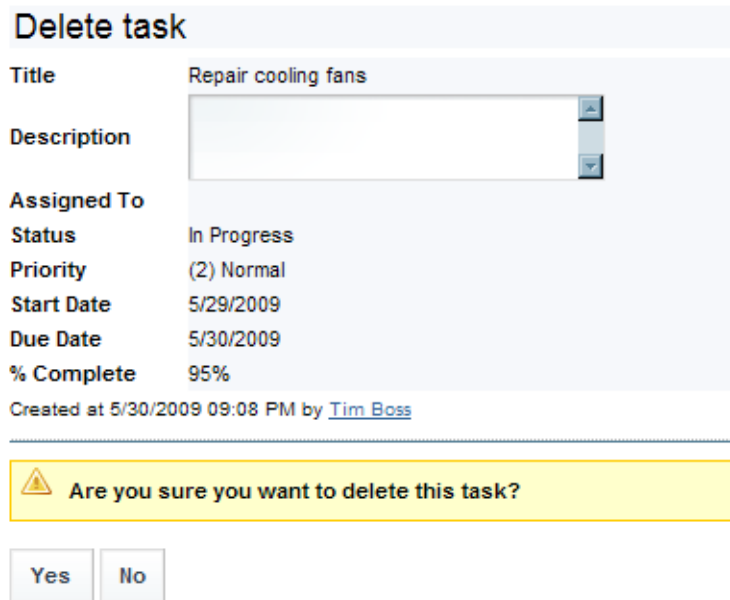
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4.15.4.6 Complete Task

A task is completed by clicking the Edit Task link or the  icon on the task details display and then either changing the % Complete to 100 or selecting a Status of Completed then clicking the Save button to save the changes to the task.

4.15.4.7 Delete Task

A task is deleted by clicking the Delete Task link or the  icon on the task details display. The user will be prompted to confirm the deletion by clicking the Yes button below the task details. The user can click No to cancel the deletion.



Delete task

Title: Repair cooling fans

Description:

Assigned To:

Status: In Progress

Priority: (2) Normal

Start Date: 5/29/2009

Due Date: 5/30/2009

% Complete: 95%

Created at 5/30/2009 09:08 PM by [Tim Boss](#)


 Are you sure you want to delete this task?

Figure 110 - Delete Task