ForumPass User Guide

February 2021

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Document Versioning

Version	Change Overview	Date	Responsible Party
6.6	6.6 Release Notes	06/08/18	Mahmuda Islam
6.7	6.7 Release Notes	11/22/19	Anne Gregg
MAG 7.0		2/19/21	Beena Nair

ForumPass Product Summary

ForumPass, Exostar's secure collaboration solution, is built on the Microsoft SharePoint platform and is enhanced with multiple security features. The solution enables customers from many industries to efficiently, effectively, and securely exchange business-critical documents and build intranets and extranets – all while maintaining compliance with applicable policies or regulations.

Many Aerospace and Defense and manufacturing organizations use ForumPass to coordinate project management, and design activities with their customers and supply partners in the centralized, secure environment. ForumPass has a simple and streamlined user interface that allows users to share information through internet sites for project collaboration, social networking, and other activities.

ForumPass users benefit from enhanced collaboration throughout every aspect of product design and development. These benefits are realized through improved communication, better quality, faster cycle times, and cost reduction.

Exostar's Managed Access Gateway (MAG)

Exostar's Managed Access Gateway (MAG) is the authentication and entry point to ForumPass. MAG extends the concept of *Web Single Sign-On (SSO)* to support highly sensitive applications which host proprietary and/or sensitive data. MAG provides the following:

- **Identity & Access Management:** A state-of-the-art, cloud-based platform that provides simple and secure access to applications.
- **Certified Public Key Infrastructure (PKI):** Full lifecycle management of digital certificates, strong authentication practices, and controlled access to applications.
- **Multifactor Authentication:** Reduces risk and provides stronger online identity protection.
- **Identity Proofing:** Provides varying levels of identity verification to address enterprise compliance and access policies.

All users must be registered in MAG prior to gaining access to ForumPass. MAG registrations can be initiated by the user, via a self-registration process, or managed by your organization's designated administrators. For more information on MAG, please visit the self-help page: MAG Registration.

Microsoft SharePoint Platform

The foundation of ForumPass is the Microsoft Office SharePoint Server 2016 platform. As one of the fastest growing applications in the Microsoft product suite, SharePoint provides tools to help simplify information management and collaboration.

SharePoint uses several building blocks which can be combined to create a variety of business solutions:

- **Project Sites**: Provide a central location to securely store, manage, and collaborate on items and information. Sites can be customized to best suit your business needs.
- **Apps**: Application web pages that make up project site collections. Apps can be added, edited, or removed from your site collection in order to best organize and present relevant information. Most commonly used Apps include: Document Libraries, Task Lists, Discussions, and Calendars.
- **Workflows**: Allow for information to be sent through a defined business process in order to generate notifications and to collect feedback and approvals.
- **Alerts**: Allow users to subscribe to items and receive notifications of added or changed information.
- **Search**: Provides the ability to find information when needed.

These building blocks form the foundation of ForumPass and are either utilized out-of-the-box (OOTB) or enhanced, based on Exostar's customer requirements.

ForumPass Exclusive Features

Leveraging the Microsoft SharePoint capabilities, ForumPass enables individuals to work together effectively by allowing them to easily share information regardless of location. ForumPass is customized with several exclusive features and enhancements, including:

- **Multi-tenancy**: Allows organizations to coexist in shared workspaces while ensuring each organization's information is secure and separate. Ensures compliance with industry standard security requirements.
- **ForumPass Profiles**: Organizations have the option to subscribe to different categories of user profiles: **Core**, **Sensitive**, **Restricted**, and **Protected**. ForumPass Site templates are allocated to organizations based on their user types.
- **Integrated WebEx**: This functionality provides the ability to schedule and manage web-based meetings and to host instant meetings. Organization may opt to subscribe to the ForumPass WebEx service.
- **End-to-End Encryption**: Available for content stored in Sensitive, Restricted, or Protected sites.
- **My Workspaces**: Provides users with a dashboard to all their projects, tasks, alerts,

checked out work, links, discussions, and quick access page.

- **My Links Menu**: Allows you to add links to sites you access most frequently. My Links list is easily accessible from the top navigation bar.
- **Invite-by-Email**: This feature makes inviting users to your site quick and easy.
- **Custom Workflows**: Allows the flexibility for organizations to define desired workflows for implementation.
- **ForumPass Support Site**: Accessible by all ForumPass users, provides support information such as Release Notes, FAQs, User and Training Companion Guides, and Notifications.

Getting Started with ForumPass

All user workstations must be equipped with defined minimum system requirements in order to work in a supported environment, and to fully benefit from the features and functionality of ForumPass. ForumPass interacts with installed software, and dictates access controls to content available within ForumPass based on your access profile. ForumPass supports multiple user access profiles, each requiring unique login credentials for user authentication. In addition, each user profile can support the use of the integrated WebEx functionality.

This section covers the setup and system requirements necessary to run ForumPass and take full advantage of its features and functionality.

System Requirements

Each ForumPass release undergoes testing with a variety of Operating Systems and Browser combinations. The combination of operating systems and web browsers supported for use with ForumPass can be found at: ForumPass Overview.

Additional requirements may be necessary for users who access sites with restrictions and who work with encrypted content.

Multifactor Authentication Credentials (optional)

Users with Sensitive, Restricted, and Protected profiles within ForumPass, require two-factor authentication (2FA) credentials. Users logging in with 2FA use their User ID and Password, as well as a software or hardware digital certificates to authenticate.

Exostar’s Federated Identity Service (FIS) and Exostar’s Managed Access Gateway (MAG) products are used to issue both basic and medium assurance level digital certificates. In order to support certificate issuance, an Exostar signed ActiveX component must be downloaded and installed on each client PC used to obtain certificates.

Digital Certificate Install Error

When attempting to download digital certificates, the following error may display:

"The ActiveX Control is not installed or is not running. You need to install it or give permissions to run it before you can proceed".

> Cause: *Internet Explorer settings and/or system level permissions that are not set correctly and therefore do not allow the download and use of Exostar's ActiveX control.*

In order to resolve the error, you must add Exostar to your Internet Explorer settings as a trusted site and additional browser settings must be set. With the proper system permission levels, follow the steps below to add Exostar as a trusted site and to examine your relevant browser and JAVA settings.

If you are unable to complete the steps below, contact your local system administrator for assistance.

A. System setup: Add Exostar as a Trusted site:

1. Open an Internet Explorer browser window.
2. Select **Internet Options** from the **Tools** menu. A tabbed dialog box opens, displaying Internet Explorer settings options.
3. Select the **Security** tab. Click **Sites** under the **Trusted Sites** section.
4. The **Trusted Sites** dialog box opens. Under **Add this website to the zone**, enter the following: **https://*.exostar.com**. Click **Add**.
5. Click the **Close** button to return to the **Security** tab.

B. System Setup: Review Security Levels:

1. On the **Security** tab, click the **Custom Level** button to display the **Security Settings** window.
2. Review the settings that allow the download and use of the Active X control. Verify your settings reflect the following:

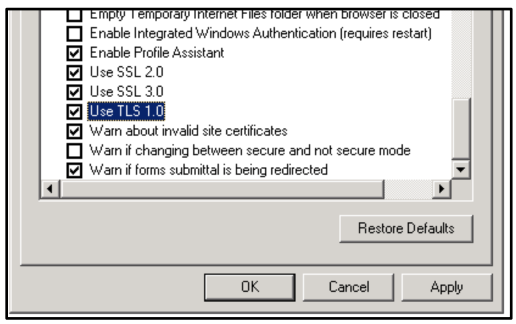
Section	Setting Name	Required Value
ActiveX controls and plug-ins	Allow previously unused ActiveX controls to run without prompt	Enable
	Automatic prompting for ActiveX controls	Enable
	Binary and script behaviors	Enable
	Download Signed ActiveX controls	Enable
	Run ActiveX controls and plug-ins	Enable

	Script ActiveX controls marked safe for scripting	Enable
Miscellaneous	Don't prompt for client certificate when no certificates or only one certificate exists	Enable
	Use Popup Blocker*	Disable

NOTE: The **Use Popup Blocker** setting disables popup blocking for all websites in the **Trusted Internet** zone. Alternatively, you can specifically disable popup blocking for the Exostar website by adding it to the list of sites not blocked by the popup blocker functionality in Internet Explorer.

C. System Setup: ForumPass Restricted and Protected Profile users must set the TLS 1.0 option.

1. Click the **Advanced** tab on the Internet Explorer options dialog box, and scroll down to the **Security** section. Check the **Use TLS 1.0** setting. Click **OK**.



Java Runtime Environment Requirement

In order to use the encryption functionality available within Sensitive, Restricted, and Protected sites, it is necessary for you to have the following supported JRE environment installed on your machine: JRE 1.8 (Version 8) or higher.

Meeting Manager System Requirements

WebEx Meeting Manager is integrated into ForumPass as an option to allow real-time internet meeting capability. The use of WebEx requires the following browser settings and can use either a runtime or local installation of the WebEx plug-in control:

Component	Minimum	Recommended
Brower Control Settings	Java Script and cookies need to be enabled	ActiveX to be enabled for the host site in Internet Explorer
WebEx Client v8.5	Local Install	Runtime Install

Design Constraints Requirements

Design constraints within ForumPass are determined by Microsoft Office SharePoint Services capabilities, as follows:

URL Length

- When storing files, the path structure and file names (entire path including sites, folders and file name) cannot exceed 255 characters or users see an error message or form validation error with the explanation around the URL length.
- Link list items are restricted to 255 characters and shorten links to SharePoint documents (or other items) with lengths longer than this.

Site Names

- Site Names cannot contain the following characters: / , \, :, *, ?, “, <, >, |, #, {, }, %, &, <TAB>, “, ~, +
- A Site Name or Sub-site Name, or a Site Group Name cannot start with an underscore (_) or with the period character (recommend avoiding the underscore character completely in site names).
- The period character (.) cannot be used consecutively in the middle of a Site Name or at the end of a Site Name.
- The URL for a site should not contain any spaces.

File Names

- File Names may not contain the following characters: /, \,:, *,?, “, <, >, |, #, {, }, %, &, “, ‘, ~, +, □
- File Names cannot be longer than 128 characters.
- The period character (.) cannot be used consecutively in the middle of a file name, at the end of a file name, or at the start of a file name.
- File names may not contain more than one consecutive space.

Folder Names

- Folder Names or Server Names cannot contain the following characters: /, \, :, *, ?, “, ‘, +, <, >, |, #, {, }, %, &, ~
- Folder Names cannot be longer than 128 characters.
- The period character (.) cannot be used consecutively in the middle of a file name, at the end of a file name, or at the start of a file name.

Document Size Limits

The system shall limit the sizes for the following:

- Large File Upload: 500MB per file

- Encrypted File Upload: 250MB per file

Interaction with Microsoft Office

Microsoft Office's suite of tools is used for content generation and modification and is the natural complement to the processes built into ForumPass. ForumPass operates most efficiently and takes advantage of optimal functionality coupled with Microsoft Office 2016. ForumPass works with MS Office 2010, but you may notice some degradation in functionality.

User Profiles

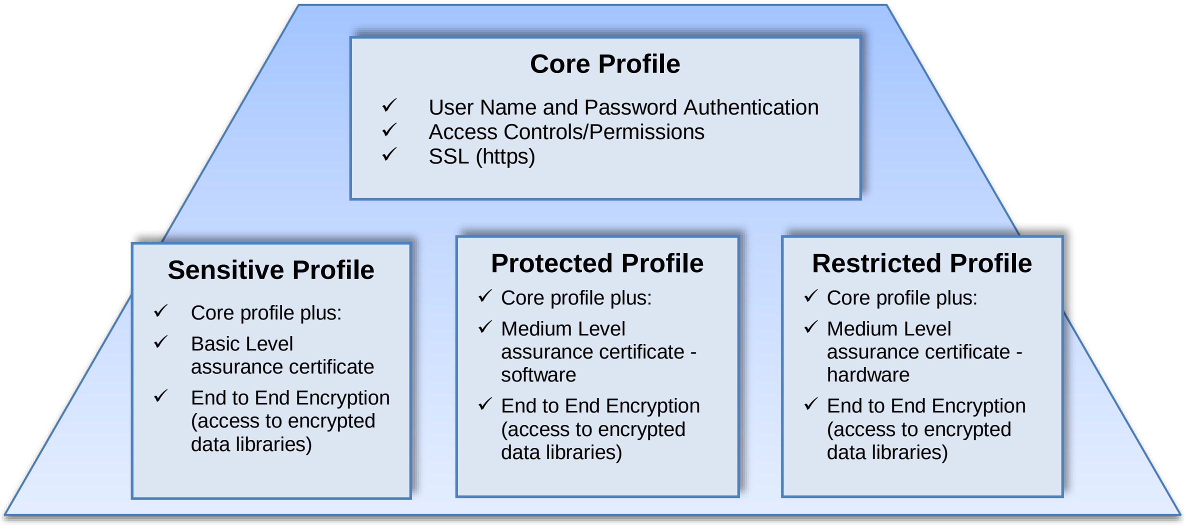
ForumPass supports four different access profiles for users: **Core, Sensitive, Restricted,** and **Protected**.

The **Core Profile** provides the following capabilities:

- ➢ Document Management Capabilities, including:
  - Multiple file upload and download capability
  - Document Check out/Upload a New Version capability
  - Version Management
  - Fully configurable folder and file level permission assignment
  - Document approval routing
  - Document access reporting
- ➢ Business Process Automation (workflows), including:
  - Customizable business workflow templates
  - Ability to route, track, and monitor tasks
  - Ability to re-route and escalate delayed tasks
  - Shared project calendar for project-wide visibility
- ➢ Enhanced Features and Usability, including:
  - Personalized site views allowing users to aggregate tasks, documents, and other resources into a single site
  - Fully customizable access controls for projects, sites, and individual documents
  - Streamlined end-user enablement process.
- ➢ Web Conferencing

The **Sensitive, Restricted,** and **Protected Profiles** provide all features of the **Core** Profile, as well as certificate-based authentication and enhanced capability to share information. CertiPath compliant certificates can be used, including FIS certificates.

Sensitive profiles have the ability to create and access both encrypted and non-encrypted document libraries. Restricted profiles have the ability to create and access only encrypted document libraries.



- **Core Profile**: Requires a User ID and Password.
- **Sensitive Profile**: Requires a User ID, Password, and Basic Level of Assurance (BLOA) certificate.
- **Restricted and Protected Profiles**: Require a User ID, Password, Medium Level of Assurance (MLOA) certificate, Restricted Attribute enabled in MAG, TLS 1.0 must be enabled in your browser and JAVA applet.

NOTE: A user authenticated at a higher level, can access sites that require a lower level of authentication, as long as the user has the correct permissions. Conversely, a user who is authenticated at a lower level cannot access sites that require a higher level of authentication, even if the user has the permissions.

End-to-End Encryption (E2E)

E2E encryption provides a high level of information integrity and security by maintaining encryption on transmitted data from the origin of the data to the destination. ForumPass encryption is invoked at the document library level to ensure files contained within that library are handled and maintained with the additional level of security encryption provides.

Before you can take advantage of the Encryption functionality, you must have a Sensitive, Restricted, or Protected Profile in ForumPass, and have a digital certificate installed on your machine. With that, dual authentication (login credentials and the digital certificate) automatically invoke when logging in to ForumPass.

Desktop Integration (DI)

Microsoft SharePoint Services provides a server-based sharing feature which integrates the user's desktop (and office applications) with SharePoint. This functionality can be used with Microsoft Office 2010, 2013 or 2016.

New User Registration and Enablement

Managed Access Gateway (MAG) is Exostar's consolidated portal for account registration, authentication, and management. In order to gain access to ForumPass, you must have an account created and approved in MAG. If certificates are required, the enablement process takes you through installing certificates.

The MAG registration and approval process is managed by administrators designated by your organization. The following sections provide direction on the user enablement process for new users and for new sponsored or non-sponsored users.

Exostar Onboarding Services

At the core of the user enablement process is Exostar's Onboarding team. The Onboarding team works directly with each company's Administrators and contacts with Sponsoring Organizations to ensure successful user registration.

New User Enablement – High Level Overview

Depending on how each company defines its process, the Organization Administrator and/or ForumPass Administrator may be responsible for initiating approvals for new users (including internals and suppliers).

Once Exostar is notified of the approved users, Onboarding reviews, approves, and validates commercial compliance (where applicable). Until this step is completed, the user is able to access MAG; however, access to ForumPass shows the user as **Pending** in the MAG portal. Upon completion of the final approval, the user can access ForumPass via the **Launch** link from the MAG portal and go through the account activation process.

New Sponsored/Non-Sponsored User

For new sponsored/non-sponsored users, Exostar's internal sales team works with the organization to validate commercial compliance prior to hand over to the Onboarding team for organization and user enablement. User enablement requires unique organization identification. Thus, if the organization is not currently registered with Exostar, the Onboarding team ensures registration of that organization prior to the user being enabled.

Exostar User Registration Contacts

For more information regarding Exostar's Managed Access Gateway (MAG) registration for your company, please contact your company representative. For registration or ForumPass questions, please visit: ForumPass Registration.

User Login

The following sections provide information on the account activation process and subsequent logins to the ForumPass application.

Account Activation

Once an administrator creates your user account in MAG, you receive an email with instructions on how to activate your account. For more information on account activation, please visit the MAG section of my.exostar.com.

Login

Once you complete account activation, all subsequent logins proceed as follows:

1. Go to the login page at https://portal.exostar.com.
2. Enter your User ID. Click **Next**.
3. Enter your Password. Click **Next**.
4. The MAG portal displays. Click **Launch** to open ForumPass.

NOTE: If you see a link with a status other than **Launch**, your account is not yet provisioned for access. Contact Exostar's Customer Support.

With a Digital Certificate installed on your system, you may receive a prompt to confirm the certificate once you select the MAG Login URL.

Export Control Usage Notice

The first time you access the ForumPass solution, the system displays the **ForumPass Export Control and Usage Notice**. All users must read the agreement and acknowledge the notice before accessing the ForumPass environment.

The agreement offers two options with the following actions:

- If you select **I have read the ForumPass Export & Usage Notice, understand and acknowledge its requirements**, you are directed to the ForumPass application

- If you select **I did not read/understand the ForumPass Export & Usage Notice**, you are denied access and are presented with additional instruction. The Usage Notice continues to display each time you log into ForumPass until you choose to acknowledge it.

If you have any questions about the notice, please contact Exostar's Customer Support.

Desktop Shortcut to ForumPass

Creating a desktop shortcut to ForumPass provides an easy way to access the solution and open a desired site. To create a Desktop Shortcut to ForumPass:

1. From any site in ForumPass, select the Exostar icon from the address bar and drag it, or copy and paste it, onto your desktop.

2. The Exostar icon displays on your desktop. Click the icon to access the site. The MAG login displays for you to authenticate.

Digital Certificates

ForumPass users who have FIS or CertiPath compliant PKI credentials can also access the application through MAG. The MAG application recognizes the certificate and provides the user with Sensitive, Restricted, or Protected access, if the user's profile permits.

- If a computer has multiple certificates installed, MAG prompts the user to choose a certificate to utilize for the sessions.
- If a user does not have a valid certificate, i.e., expired certificate, the user receives an error message. Depending on the user profile, and their need for a digital certificate, the user can choose to delete the certificate or renew.

For assistance with this process, please contact Exostar's Customer Support.

Access Restricted

If a user tries to access a site but does not have sufficient assurance level credentials, the system denies access and displays an **Access Restricted** page. In order to gain access, the user must logout and login into MAG with stronger credentials and access the ForumPass application again.

Renewal of Digital Certificate

You are prompted to renew the Basic Level Assurance (BLOA) digital certificate every year, and the Medium Level Assurance (MLOA) digital certificate every one or every three years (depending on the user's subscription period). When the renewal period is approaching, you receive an email with instructions on the renewal process.

ForumPass Landing Page

Once you login to ForumPass via the MAG platform, you are redirected to your My Workspaces page. This page serves as a dashboard to all your work activities. My Workspaces provides an access point to all your project sites – including those created by you, or to which you are granted access – and to your work activities. You have the following tab options:

- **My Workspaces**: Lists all projects you have access to.
- **Checked Out**: Provides a list of all files you currently have checked-out.
- **Tasks**: Displays all tasks assigned to you across all projects.
- **Alerts**: Displays all alerts you created or were created by someone else, on your behalf.

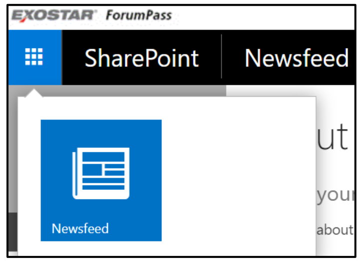
On the bottom of the page, you have the following options:

- **My ForumPass Profile**: Redirects to your profile page, where you can update personal information.
- **My ForumPass Support**: Provides access to all ForumPass-related documentation, Release Notes, FAQs, etc.
- **My MAG Profile**: Provides access to the **My Account** tab in your MAG profile.
- **My WebEx Personal Room**: Provides access to WebEx functionalities.
- **Getting Started FAQ**: Redirects you to the ForumPass Support Site directly in the FAQ section.
- **ForumPass 6 Training (Scheduled)**: Provides registration information for the monthly ForumPass Familiarization Training and Site Creator Training.
- **ForumPass 6 Training (Pre-Recorded)**: Provides previously recorded ForumPass Familiarization Trainings and Site Creator Trainings.

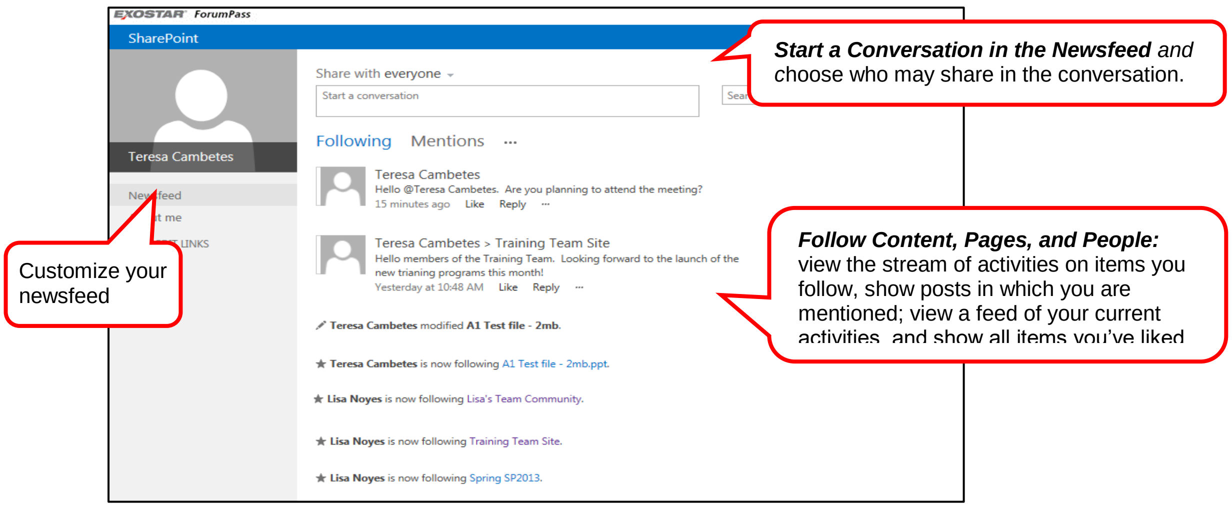
IMPORTANT: The landing page can be customized with branding elements by Site Collection Administrators.

Newsfeed

A Newsfeed page is created for each user upon first login. The Newsfeed is located by clicking the top left menu and selecting **Newsfeed** from the drop down.



The Newsfeed supports the social networking features integrated throughout ForumPass, and it provides access to the user's **About Me** page.



My Newsfeed

The Newsfeed page contains a stream of information regarding content items, sites, and people you chose to **Follow**. The page also supports the **Conversation** feature, which allows you to mention and dialog with others in your organization or within a specific project area.

Features of the Newsfeed:

- **Follow Content, Pages, and People in the Newsfeed stream***:* Quickly and easily follow activities on documents, sites, and people of interest.
- **Start a Conversation in the Newsfeed***:*
  - Choose who may view your conversation
  - Add mentions (@) and alert users
  - Designate who can view the conversation
- **Customize your Newsfeed settings**: **About Me → Edit → … → Newsfeed Settings**

<u>Newsfeed Activities Feed</u>

- The **Following** view of the newsfeed stream contains items you find most relevant and interesting. Here, you see posts created by people you follow, and updates to things you currently follow including people, documents, sites, and tags.
- The **Mentions** view shows all the posts in which you are mentioned.
- The **Activities** view shows a feed of your current activities. The activities view also appears in your **About Me** page.
- The **Likes** view shows the list of all items you **liked**.

<u>Conversations</u>

When conversations are started, or when someone replies to an existing conversation, it appears in the **Newsfeed Stream**. The **Following** view displays conversations initiated by people you currently follow and conversations shared within sites you currently follow. The **Mentions** view shows conversations in which you are mentioned.

NOTE: Anyone who sees a conversation in the thread can post a reply to that conversation post. As a result, you may see replies to conversations created by people you are not currently following.

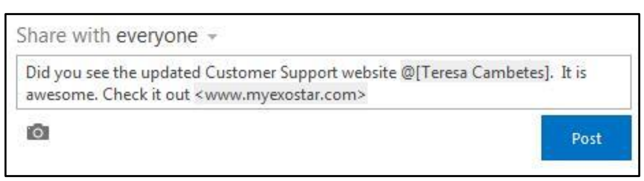
Conversations may include mentions, a feature which allows you to call out someone from your organization, and URLs, and embedded pictures. Users mentioned in a post receive email notifications, and can see the post in their newsfeed.

To Start a Conversation

You can initiate a conversation from your newsfeed page, and you can choose to share the conversation with **Everyone**, or **Restrict** a conversation to a subset of people.

To initiate a conversation:

1. From the **Newsfeed** page, type a message in the **Start a Conversation** field.



   You can include **Mentions** in a post if you want to draw attention to someone in your organization. Use the @username to call out the user.

   - People you mention receive email message to let them know they've been mentioned.
   - People you mention will see the post in their newsfeed.

- Others can see the person you've mentioned as a link, and can go to his/her site page.

You may also choose to include URLs and embed pictures.

2. Select who the Conversation will be shared with.

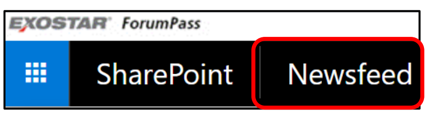
3. Click **Post**. The conversation is created and posted on the appropriate newsfeed streams.

<u>Newsfeed Settings</u>

Your Newsfeed is where you can see what your co-workers are doing, track activities, and share ideas and observations. Depending on your settings, the newsfeed may be set up to send emails to notify you of events. Newsfeed email notification settings are managed from within the **About Me** page.

To view and edit **Newsfeed** settings:

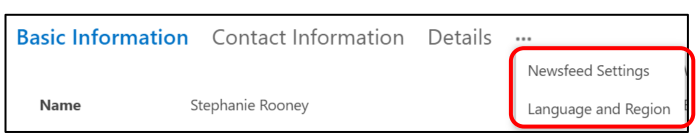
1. From within the Newsfeed page, or from the **User Access** menu in the top-right of the ForumPass application, access your **About Me** page.



OR

2. Click **Edit your profile** to display the **Edit Details** page.

3. Click the ellipsis **(…),** and then click **Newsfeed Settings**.



4. Edit your information as desired, including:
   - Followed Tags
   - Email Notifications
   - People I follow

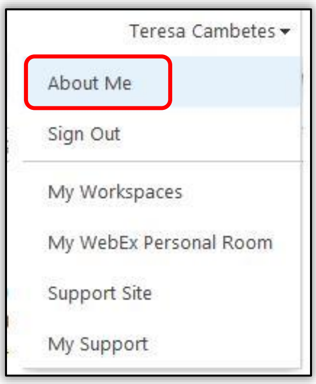
- Activities I want to share in my newsfeed

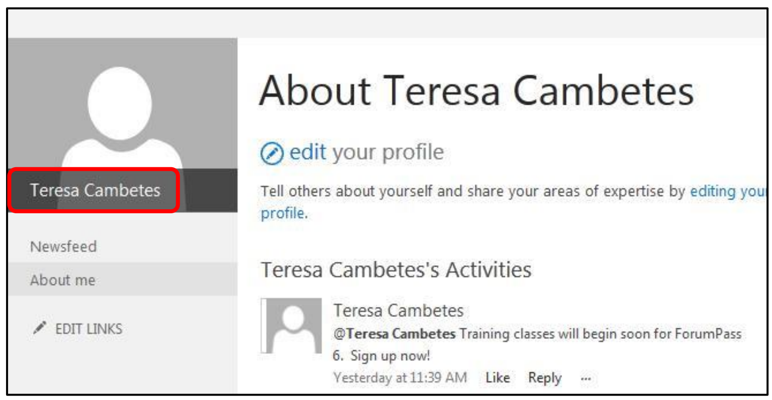
5. Click **Save** and close.

About Me

Your personal profile contains information about you, which can be viewed by people in your organization when they visit your profile page. Some profile information is fixed by your organization and always shared with everyone, such as your name, title, and department. You can provide additional personal details about yourself and choose to share this information with others as well.

To view your profile, select **About Me** from the **User Access** menu or from the **Newsfeed** page.





The About me page displays a list of your recent activities, and provides a link to **Edit** your profile.

Edit Your Profile Page

On the **About Me** page, there are several sections of information which can be populated and edited including: Basic Information, Contact Information, Details, Newsfeed Settings, and language and Region preferences.

ForumPass General Navigation

Each site within ForumPass has its own unique elements and can be tailored to meet project and user specific requirements. There are several site navigational elements that remain consistent throughout each site.

User Access Menu

Your User Access Menu is located in the upper right corner of all Site pages. It consists of a set of navigational links that provide access to commonly used areas. The options on the menu may vary depending on the page you are currently viewing and your permissions on that page.

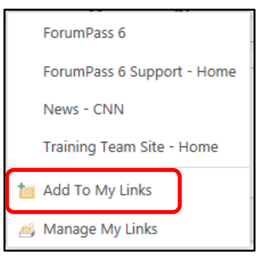
- **About Me:** Access your profile page to update information about yourself.
- **Sign Out:** Logs you out of ForumPass.
- **My Workspaces:** View the list of project sites, documents, and items you have access to.
- **My WebEx Personal Room:** Provides access to your personal space in WebEx.
- **My Information Service:** Provides access to the ForumPass support documentation, Site Ownership information, a user search option, and an additional resources tab.

My Links Menu

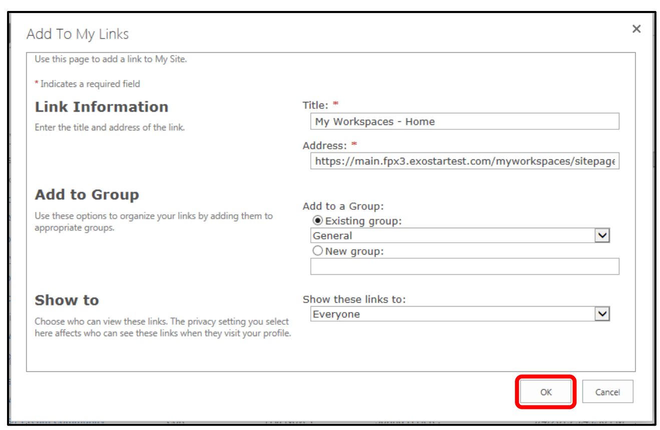
ForumPass allows you to manage a list of links important to you. The links list may include links to existing sites in the environment, links to other resources in your corporate network, or links to resources available across the internet. You can create and organize your links.

To add links to your My Links menu:

1. Navigate to the site you would like to add to the **My Links** list.
2. Open the **My Links** menu. Click **Add to My Links**.



3. The **Add to My Links** page displays. Complete the following fields:
    - Enter a **Title** for the link.
    - Verify the URL in the **Address** field.
    - Select a group under which to organize the link.
    - Choose who can view these links in your profile information.
4. Click **OK** to create the link.

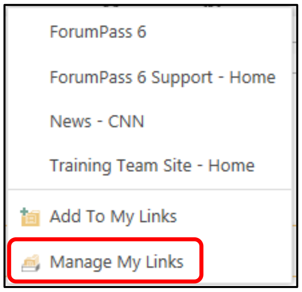


NOTE: You may also add a link by copying a URL into the **Address** field.

To manage your My Links list:

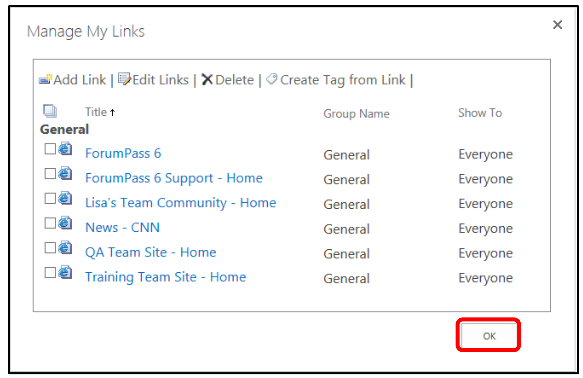
1. From any location in ForumPass, open the **User Access Menu** and select **My Links**.

2. Select **Manage My Links**.



3. From the **Manage My Links** page, you may choose to:

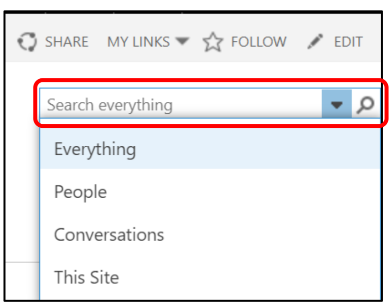
    - **Add a Link**: This page allows you to enter the page information.
    - **Edit Link**: Select a link and edit the title, URL, permissions, and/or group association.
    - **Delete Link**: Select a link to delete.
    - **Create Tag**: Select a link and create a tag to that item.



4. Click **OK** to when you complete any changes.

Search Bar

A basic search can be performed from any site in ForumPass by using the **Search** feature. This feature provides the ability to search sites, lists, and libraries within the site collection, that you have access to, in order to find information and documents.

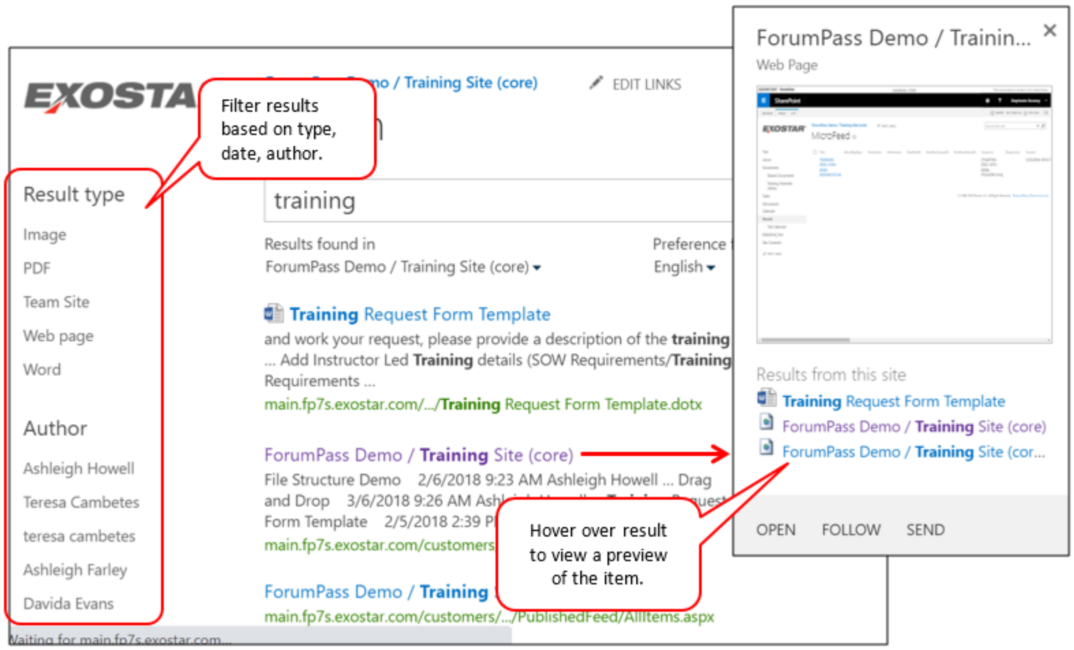


NOTES:

- Keywords and phrases can be used in the search field.
- Search filter options allow you to select to search for **Everything** (all matches), or to limit searches to **Conversations**, **People**, or **This Site**.
- The default search results include all indexed content that match your search criteria and you have proper permissions to access.

Search Results

Search results are displayed on the **Search Results** page. From the Search Results page, users can further refine the search scope results by clicking on additional search filtering options offered in the left navigation menu. Hovering over an item in the search results offers a preview of that item.



Search tips:

- ForumPass supports full word searches (full words separated by spaces). Partial keyword searches and wildcard (e.g. *, $, #, etc.) searches are not supported.
- ForumPass search results are controlled by the scope of the search as set by the Administrator as well as the user.
- The user can see an item in the search results if the user has at least **View Item** permission on that item. To actually access and open the item, the user must have proper permissions and authentication credentials.

Settings Menu

The Settings menu provides administrators access to manage site permissions, view and modify site settings, and content areas, or Apps, or create new subsites. The options available on the Settings menu are permissions driven, and vary depending on the page you are viewing and your permission settings.

Add a page: Create a new page to include in the project site collection.

Add an app: Add a new content area (list, library, wiki, etc.) to the project site collection.

Site Contents: Display all lists, libraries and subsites in the site.

Change the look: Change the layout of your page display.

Site Settings: Provides access to site management options.

Getting Started: Customize your lists/libraries and other display options.

Invite By Email: Easily add users to collaborate on a project.

Remove User: Easily remove users from your site/project.

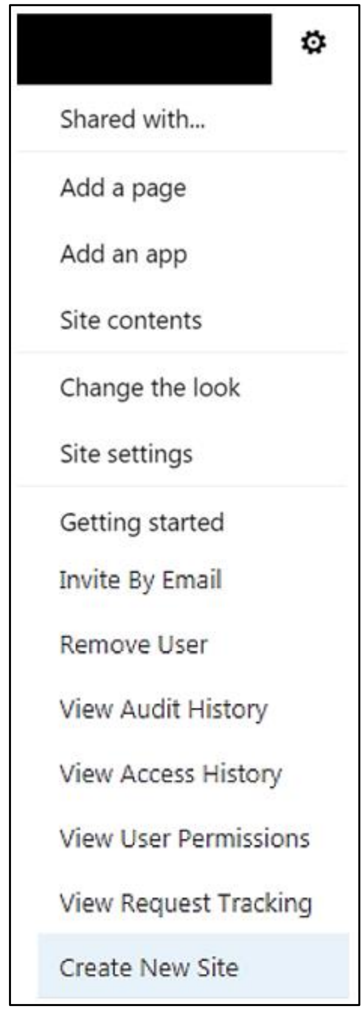
View Audit History: Allows you to view audit history for this site for the past thirty days.

View Access History: Lists all users who have access to this site and indicates last date/time of access.

View User Permissions: Lists permissions for all users with access to this site. The user permissions pages displays the list of users and their permissions and rights.

View Request Tracking: Shows the request tracking by user for the site for the past 30 days.

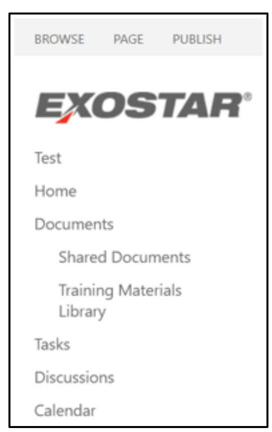
Create New Site: The opens the Site Provisioning Form to create a new subsite.



Quick Launch Menu

The **Quick Launch** menu is located along the left side of all project site pages. The Quick Launch Menu displays links to featured site content containers such as lists, libraries, sites, and publishing pages. The Quick Launch Menu:

- Can be configured, reordered, and its contents can vary from site to site.
- As new apps (libraries, lists, etc.) are added to the site, the Site Creator can choose to include a link to the item on the Quick Launch Menu.



Quick Launch Area Customization

The Quick Launch Area can be configured by Site Administrators who can determine what is displayed in the menu, the ordering, and the headings. Because the Quick Launch Menu is configurable, all lists and libraries for the site may not always display. Customizations of the Quick Launch Menu are done on a site-by-site basis; therefore, subsites do not inherit the parent site settings.

The Quick Launch Area can be customized in many ways, including:

- Add a new link to a site, either within the site collection or external to the site collection;
- Delete a link;
- Change the name and URL of an existing link;
- Change the order of links within a heading;
- Change the names and URLs of headings, delete headings and create new headings;
- Change the order of sections (i.e., headings and their associated links).

To customize the Quick Launch Menu:

1. Go to **Settings** dropdown menu (gear icon).
2. Select **Site Settings.**
3. Under the **Look and Feel** section, select **Navigation.**
4. Scroll to the **Structural Navigation: Editing and Sorting** section, and make any necessary changes.
5. Click **OK**.

Site Contents

The Site Content navigation element is available from the **Settings** menu and from the **Quick Launch Menu**. Site Contents acts like a **Table of Contents** for the site collection. From the Site Contents page, users can easily view what is available in the site and navigate to desired content. The Site Content link cannot be customized or disabled in the user interface.

Only subsites that are direct children of the parent site are displayed on the Site Content page. For example, in a site hierarchy where the parent site has three subsites and each of the subsites has additional subsites, the Site Content page displays only the three subsites one level below the parent.

Recycle Bin

The Recycle Bin appears as a link in the upper right corner of the Site Content page. The Recycle Bin acts as a multi-stage recycle bin, providing a safety net when deleting documents, list items, folders, and files. When site members delete any of these items from a site, the items are placed in the Recycle Bin and remain there for 30 days.

To open the Recycle Bin and view all the content recently deleted, go to **Site Contents** and click **Recycle Bin**. From there, deleted items can be restored or permanently deleted from the Recycle Bin.

The Recycle process works as follows:

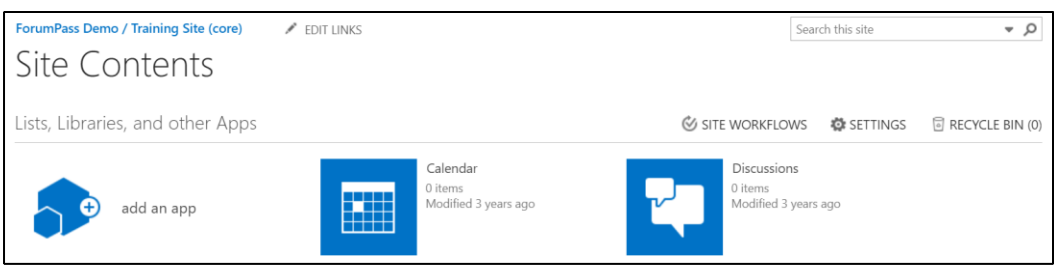
Stage 1: End-user deletes a document from a document library.

Stage 2: The document is moved to the site's Recycle Bin, where the user can restore or delete it.

Stage 3: If the file is deleted from the site Recycle Bin, it is sent to the Site Collection Recycle Bin, where it remains for an additional 30 days, from here an administrator can restore it or delete it permanently.

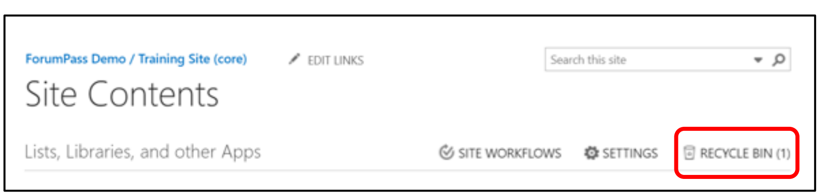
The Site Collection Recycle Bin gives the administrator of a site collection greater control over deleted items by providing a second stage safety net before an item is permanently deleted.

The Site Collection Recycle Bin is enabled in a site collection by default, and is configured by Exostar at the site collection web application level. Exostar can also disable the Site Collection Recycle Bin, or disable the Recycle Bin in a site collection altogether, upon request of an Organization Administrator (although this is not recommended).



How to access the Recycle Bin:

1. From the Quick Launch Menu, click **Site Contents**.
2. In the upper right of the Site Contents page, click **Recycle Bin.**



3. Place a checkmark next to an item in the recycle bin. With the item selected:
    - To restore: Click **Restore Selection**

- To delete: Click **Delete Selection**.

NOTES:

- If you restore an item originally located in a deleted folder, the folder is recreated in its original location and the item is restored in that folder**.**
- Items deleted more than 30 days prior are automatically permanently deleted from the user's recycle bin.
- Items in the recycle bin count toward the site quota.
- Items are sorted in descending order by date deleted.
- The second stage is invoked when the end user deletes the item from the Recycle Bin. The item no longer displays in the interface for the end user and no longer counts toward the site quota. The Site Collection Administrators can see all second-stage deleted items and can restore deleted items from this stage.

ForumPass Component Overview

ForumPass sites are comprised of several components essential to the effective use of the solution. Although each of these items are discussed in detail in later sections, the following section offers a brief overview of each element.

Sites and Site Collections

ForumPass Sites are webpages that provide the data management capabilities and the collaboration services that make up the foundation of ForumPass. Sites include a variety of components, such as Apps and Webparts, that support the hosting and managing of information; and, sites are designed to be dynamic and interactive.

Site Collection, or Project site collections, simply refers to a collection of sites organized around a central Team site and used to manage all aspects of a project.

Site Templates

Creating a new site in ForumPass begins with the selection of a site template. A variety of site templates are available and templates may include lists, libraries, pages, and other elements and features.

In addition to many standard templates available through SharePoint, Exostar developed a custom template called the **Quick Start Template**, which can be used as a starting point for new projects. The template includes frequently used collaboration features and common configurations.

Custom Site Templates

In ForumPass, users have the option to create Custom Site Templates. In order to create a custom template, you must first begin with an existing template available from the list of default templates. Once a site is created with a default template, you may then modify the site as desired, and save it as a custom template.

To save a new template:

1. Access the **Settings** menu (gear icon).
2. Select **Site Settings.**
3. Select **Save as Template** under the **Site Actions** section.

ForumPass Apps

The App is a fundamental component of the ForumPass solution. Apps are content containers that store a collection of information you share with team members. Several types of Apps are incorporated in site templates and, as such, become a part of the Site Collection when created. These Apps range from document libraries and task lists to calendars. Additional Apps can be incorporated into Site Collection as the project necessitates.

ForumPass Apps are easy to incorporate and can store virtually any type of information. The most commonly used Apps include:

- Document Libraries
- Calendars
- Tasks
- Announcements
- Contacts List
- Discussion Boards.

In addition, custom lists may be created for just about any usage scenario to track and share information.

Web Parts

Web Parts are used to display information on your site. Web Parts are stored in a gallery and are then incorporated into web pages. When an App is added to a project, ForumPass automatically generates a corresponding Web Part that can later be added to a Web Part page. Users should think of a Web Part as mini-applications or modules that display information on a page or perform a special function.

Workflows

A Workflow automates a business process by breaking it into a set of steps users must take to complete a specific business activity. Automation eliminates manual tasks and reduces the chance of data entry errors. ForumPass includes several standard workflows, and users can create customized workflows. Workflows are generally incorporated in document libraries, but may also be applied in list apps.

When you initiate a workflow, it generates status entries for each of its stages in a Task list and the workflow's progress is recorded in a workflow history list. If a user fails to respond to a task, the workflow reminds them of the task and tracks when it is past due. Typical Workflows include: Approval, Approval with Notification, Collect Feedback, and Notification.

To initiate a workflow:

1. In your Document Library or List, place a checkmark next to the desired file or folder.
2. Click the **Workflows** icon in the **Files/Items** ribbon.
3. Select the desired workflow.
4. Fill out all necessary information and click **Start**.

Content Types

Content types are a set of fields grouped together to form metadata, behaviors, and workflow for a particular content item. When new documents are added to a library, a document profile is created based on the content type of the new document. Content types allow a user to manage multiple kinds of documents within a single library. As you associate a content type with a document library or list, it appears in the library or list's **New** dropdown menu.

ForumPass Apps

A key means of information storage, tracking, sharing, and collaborating in ForumPass is achieved using Apps. Every App in ForumPass can contain its own unique set of attributes that describe the items in that App. For example, within an app users can control how information is displayed, who has the ability to edit or view information, and whether new content must be approved before it appears in the list.

ForumPass includes a variety of standard App templates and provides the ability to create custom Apps. Each App template is designed to allow maximum efficiency when working with particular types of documents.

Apps can be divided into two general types: Libraries and Files which support different functionalities.

Files Apps:

- Collect and share information and facilitate communications.
- Track information by presenting it in columns and rows.

Library Apps:

- Collect and share documents and support collaboration.
- Supports folder structures, versioning, and check in/check out capabilities.
- Maintains standard properties (title, author, updated dates) and allows for custom properties to be included.

Features of an App

There are many different ways you can work with Apps in your site to help manage information for your group:

- Using apps, you have the ability to track versions and history of items, so you can see which have changed from version to version, who made the changes, and when.
- Apps can be set up to require approval on new or changed data. Specify approval for an item is required before it can be viewed. If approval is required, the item remains in a pending status until it receives the required approvals.
- Apps support integrated email notifications.
- Customized permissions can be set within an App. Users with permission to manage the app can read and edit all items, while others may be assigned Read only rights. Permissions can also be set up on a single list item.
- Create and manage views to best support the data and user needs. Users can create different views of the same app. The contents do not change; however, the items are organized or filtered so that the user can easily locate important information.
- Incorporate formulas and calculated values to generate information in the columns of an app. The operation can include information from one or more columns in a list, as well as functions such as "today" to indicate the current date.
- Keep informed about changes within an app by creating an alert on the app.

App Templates

ForumPass supports many App Templates which offer a variety of features to support the management of information. Lists can be grouped into four categories: Communication, Tracking, Libraries and Custom.

- **Communication**: Provide templates to facilitate communication with other users of the site.
- **Tracking**: Provide templates which support information tracking.
- **Document Libraries**: Provide library templates to support the organization and collaborate of documents.
- **Custom Lists**: Provide the templates that allow you to define all of the desired settings and columns to suit your site needs.

Category	List Template	Features
Communication / Content	Announce-ments	Share news, status, reminders and other short pieces of information.
	Links	A links list can be used as a central location for links to the web, the company intranet, and other resources that you may want to share in your site.
	Contacts	A list of people your team works with, like customers or partners. Contacts lists can synchronize with Microsoft Outlook or other compatible programs.
	Discussion Board	A place to have newsgroup-style discussions. Discussion boards make it easy to manage discussion threads and can be configured to require approval for all posts.
	Promoted Links	Use this list to display a set of link actions in a tile based visual layout.
Data	Survey	A list of questions which you would like to have people answer. Surveys allow you to quickly create questions and view graphical summaries of the responses.
	External List	Create an external list to view the data in an External Content Type.
	Import Spreadsheet	Create a list which duplicates the columns and data of an existing spreadsheet. Importing a spreadsheet requires Microsoft Excel or another compatible program.
Tracking	Advanced WebEx Meetings	Create a calendar list when you want a calendar based view of upcoming WebEx meetings and events. You can also host Instant WebEx meetings from this calendar.
	Restricted WebEx Calendar	Requires that both the meeting host and participants authenticate in ForumPass in order to access the meeting event.
	Calendar	A calendar of upcoming meetings, deadlines or other events. Calendar information can be synchronized with Microsoft Outlook or other compatible programs.
	Tasks	A place for team or personal tasks. Tasks can be assigned to people, and their status can be tracked and recorded as the task is completed.
	Project Tasks	Used to track information about projects and other ongoing to-dos for team members.

	Issue Tracking	A place to manage issues or problems associated with a project or item. You can assign, prioritize and track issue status.
Custom	Custom List	Create your own list from scratch; add any other columns you need, and add items individually, or bulk edit data with Quick Edit.
	Custom List in Datasheet View	A custom list which is displayed as a spreadsheet in order to allow easy data entry.
Libraries	Document Library	Use a document library to store, organize, sync, and share documents with people. You can use co-authoring, versioning, and check out to work on documents together. With your documents in one place, everybody can get the latest versions whenever they need them. You can also sync your documents to your local computer for offline access.
	Encrypted Document Library	Used to manage documents that you want to have encrypted. Any document uploaded to this library will be end to end encrypted. You must be a Sensitive, Restricted, or Protected user on a Sensitive, Restricted, or Protected site for this functionality to be available.
	Data Connection Library	A place where you can easily share files that contain information about external data connections.
	Form Library	A place to manage business forms like status reports or purchase orders. Form libraries require a compatible XML editor, such as Microsoft InfoPath
	Wiki Page Library	An interconnected set of easily editable web pages, which can contain text, images and web parts.
	Picture Library	A place to upload and share pictures.
	Asset Library	A place to share, browse and manage rich media assets, like image, audio and video files.
	Report Library	A place where you can easily create and manage web pages and documents to track metrics, goals and business intelligence information.

Using App Templates

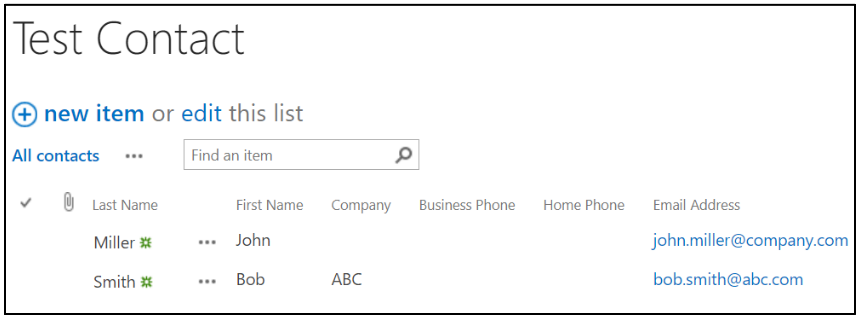
In this section, several commonly used apps will be further defined and default columns and views available within these lists will be highlighted.

Announcements

The Announcements List template allows you to share important time-sensitive information with site users. The Announcements functionality provides a number of features such as versioning, expiration dating, and formatting tools.

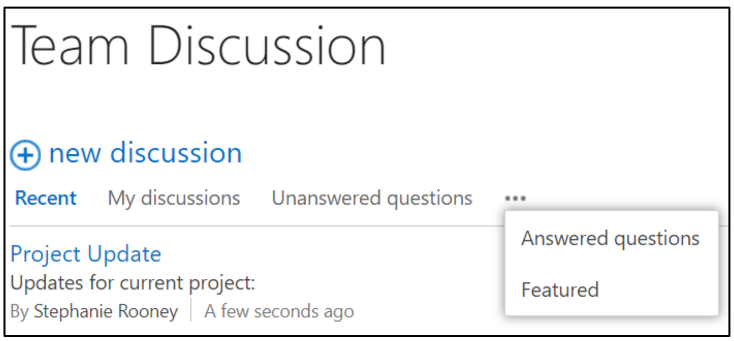
Contacts

The Contacts list template can be used to maintain the contact information for team members, clients, suppliers, etc. The app will be maintained in the project site collection, and may be used by all team members. Items in the Contacts list can be exported from ForumPass into Outlook or saved in vCard file format.



Team Discussion

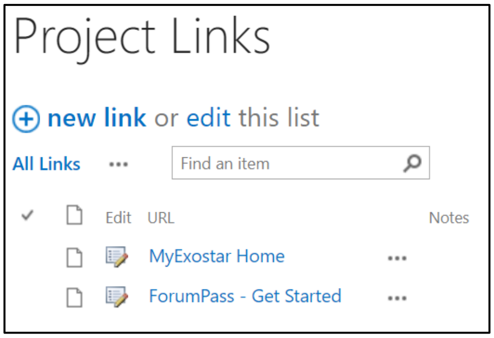
The Team Discussion list template works similarly to an internet newsgroup or web discussion forum and it facilitates discussions around specific topics. New discussion topics can be created, and replies to existing topics recorded.



Within the Team Discussion you may access existing discussions, reply to a topic, and create new discussions. Using the ellipsis menu, you may also choose to create an alert, mark as featured or delete the item.

Links

The Links list template displays a list of links that have been added to the list. The template allows users to enter the URLs, provide a title and includes a note, or description, of the link. The URLs can point to internal site collection pages, external sites, other project pages, corporate websites, and intranet sites.



NOTE: When you select a link from the list, the link opens in the current browser window. You may, however, right-click on the link and choose the **Open in New Window** option to launch the site in a new browser window.

Calendars

The Calendar list template is used to keep team members informed of upcoming meetings, deadlines, events, and milestones. The Calendar apps support the scheduling of meetings, webex meetings, and recurring meetings

There are several types of Calendar Apps including: Advanced WebEx Calendar, Restricted Audience WebEx Calendar, and Calendar.

Tasks Lists

The Task list template is used to assign and track tasks for site users. When tasks are added, the email notification option allows users to be notified of assigned tasks. The app includes a timeline visual.

The Task app offers many different views which allow users to easily display the tasks that they are interested in. Views include: All Tasks, Completed, Gantt Chart, Late Tasks, My Tasks, and Upcoming.

Custom List

Custom List Apps provide the opportunity to share information the way you want with your team members. Create your own list from scratch, add any other columns you need, and add items individually, or bulk edit data with Quick Edit.

Document Library

The Document Library template is used for collaboration on your documents and files. The Document library supports many collaboration features, including check-in/check-out and versioning, and document libraries allow you to apply business rules-based workflows and control item-level permissions to all shared documents.

Picture Libraries

The Picture Library template shares many similarities with document libraries, and has some additional tools that facilitate working with image files. Image files can be uploaded, organized into folders, and managed through workflows just as documents are in a document library.

There are limitations to the file types that the Office Picture manager will support. The supported files types are .gif, .jpeg, .jpg, .jfif, .bmp, .png, .wmf, .emf, .tif, and .tiff.

NOTE: If the file type to be uploaded is allowed by ForumPass, but not supported by the Office Picture Manager, the user will need to use the Add Picture command and add the files one at a time.

Encrypted Document Library

An Encrypted Library is a library type that is available only on Sensitive, Restricted, and Protected site templates. The Encrypted document library offers all of the same functionality as a standard document library; in addition, all documents that are uploaded in an encrypted library will be end to end encrypted (E2E). The Java applet (version 5.0 or higher) must be installed on the user's computer for E2E to be successful.

Wiki Page Library

A Wiki Page Library template is a collaborative web page that teams use to share information in a highly interactive and less structured environment. In a Wiki Page library you can add, edit, or remove web page content in an open and informal manner without following a restrictive editing or approval process. Wiki pages can be more inviting for team members to add their experiences and goals because of the lack of formality and restriction.

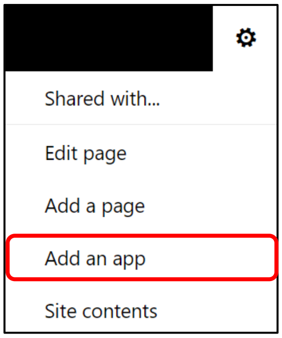
Using Apps

Apps are easy to use applications that can be added to your site to address specific project needs or to display information. There are a variety of App templates available, as discussed above, from which to incorporate into your project sites.

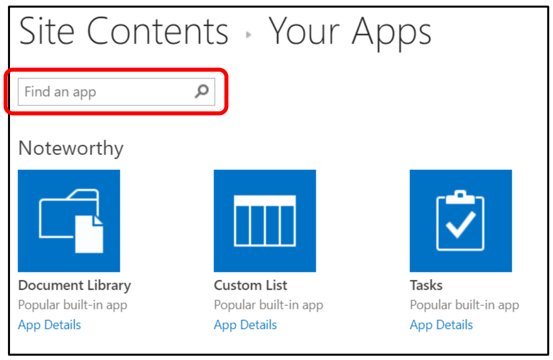
Add a App to a Site Collection

In the same way that a user may add a sub site to an existing site collection, they may also add a list, library or other app by following the steps below.

1. Access the project. Open the **Settings** menu and select **Add an App.**



2. From the list of App templates, select the desired App to add to the project site. You can use the **Search** field to locate an App.



3. Enter a name for the new App. Click **Advanced Options** to add a description for the app.

4. Click **Create**.

Toolbar Ribbons

ForumPass project site collections typically include a variety of list and library content areas, or apps. Each content area provides two toolbar ribbons designed to help you easily locate and complete commands used to facilitate collaboration, manage content and manage content areas.

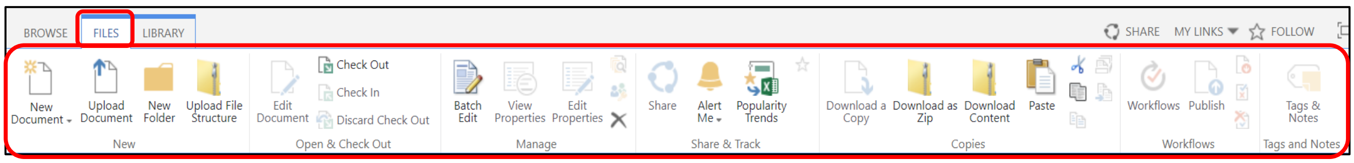
- **Library/List Ribbon**: Offers many commands used to help define and manage the content area, including display views, content filters, library alerts, customization tools, and library settings, among other things. This toolbar is covered more extensively in the **Site Creator** class.

- **Files/Item Ribbons**: Offers many commands used to help manage the content within the content area.

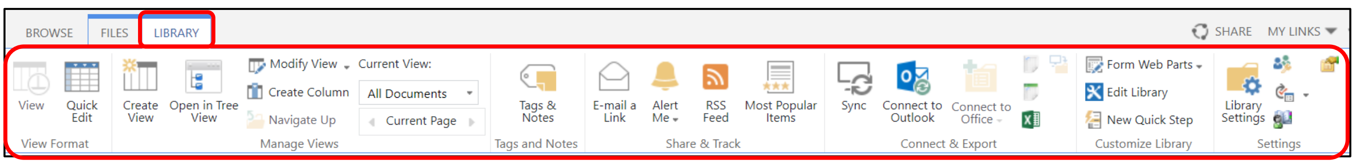
The File (list) / Library Ribbon

This chapter reviews the toolbar controls available in both File (Lists) and Libraries.

File (List) Toolbar Ribbon



Library Toolbar Ribbon



Common Controls:

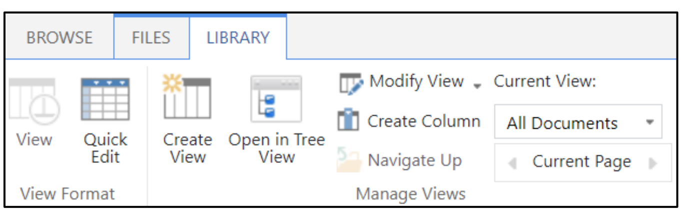
Grouping	Commands
View Format	View – displays items in the standard format.
	Quick Edit View – displays items in a datasheet or workbook format.
Manage Views	Create View -- allows for the selection of columns, filters, and settings to create a view.
	Open in Tree View – shows files and folders in tree view fashion.
	Modify View -- allows for the modification of the current view.
	Create Column– allows you to add a column to the list.
	Current View filter – toggle between views in order to define content being displayed.
Share and Track	Email a Link - sends a link to this library to your designated recipient.
	Alert Me - allows the user to receive email notifications when items within this list change.
	RSS Feed -- view and subscribe to the RSS feed for this list.
Connect and Export	Export View Data – export the data from the current view of the list to an Excel workbook.
	Export List Data – export the data from all columns in this list to an Excel workbook.

	Connect/Sync To Outlook – synchronize items and make them available offline using Microsoft Outlook.
	Export to Excel – export the data from the current view of this list to an Excel workbook.
	Open with Explorer / Project / Access - work with list items using MS Office applications.
Customize Library	Form Web Parts – modify the Web Parts in the forms associated with this library.
Settings	Library Settings– go to the Library Settings page to manage settings such as permission, columns, views, and policy.
	Shared With... -- add, modify or remove user permissions associated with this library.
	Workflow Settings – modify the workflows associated with this library, or add new workflows.

Managing Views

Views are used to present items in an App in ways that are most relevant to you. All Apps come with standard views, and additional custom views may also be incorporated. For example, if you would like to display all of the items in the list, the standard **View** option is selected. Or, you may want to create a view that displays items that are department specific, or one that display only certain file types.

The **View Formats and Manage Views** groups of commands allows the user to access default views and to create, modify and manage different content views within the workspace. Multiple views can be created within a workspace for users to select from.

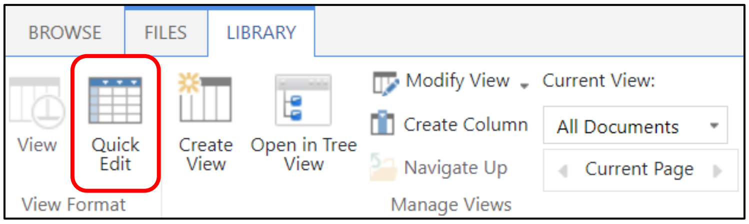


Quick Edit View

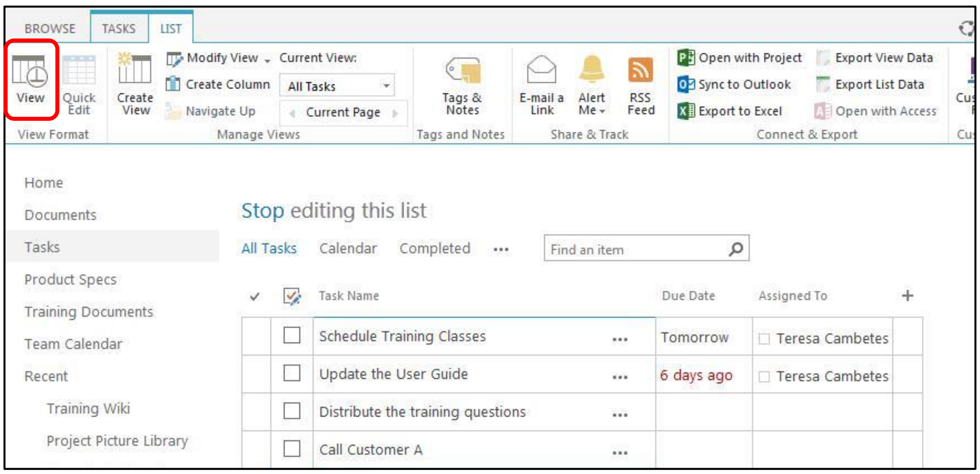
The Quick Edit view provides a workbook content display which allows for easy editing and updating of list-based data. To edit a list in the **Quick Edit View**:

1. From the Quick Launch Area, select a list app to open it.
2. Go to the List toolbar ribbon.

3. Select **Quick Edit**. A grid control similar to MS Excel will display the list content.



4. The list is displayed in the datasheet view where content can be added or edited directly in the list cells.



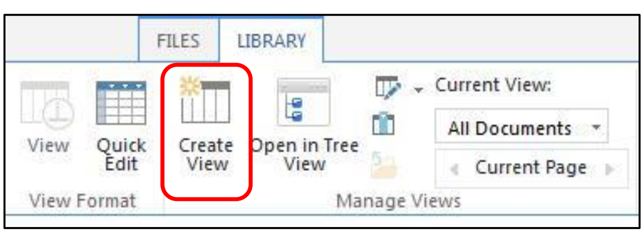
5. When you are done editing the list, select **View** on the toolbar. The default view of the list will be displayed.

Create or Modify View

Views are used to display information within in a library or list in different ways. Some views display all the items, while others show specific items based on their properties or metadata values. ForumPass views can be customized and used to quickly find relevant information.

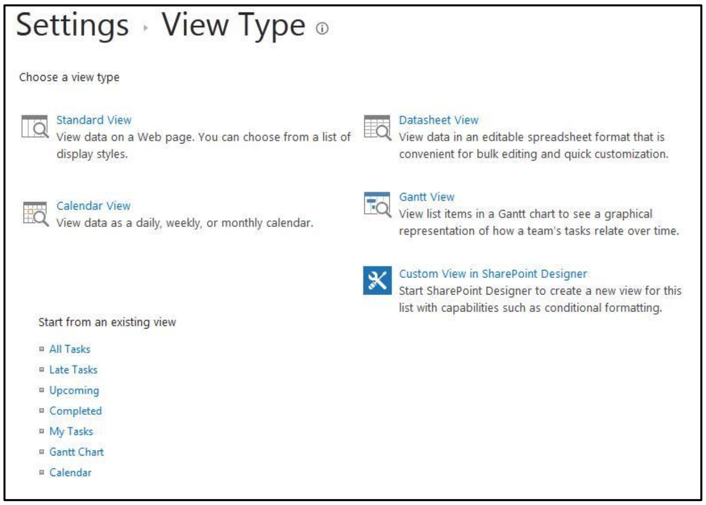
How to create a view:

1. Working within an app, open the List or Library toolbar ribbon.



2. Click **Create View**.

3. Select the view format you would like to use. You may choose from view templates or you may choose to edit an existing view.



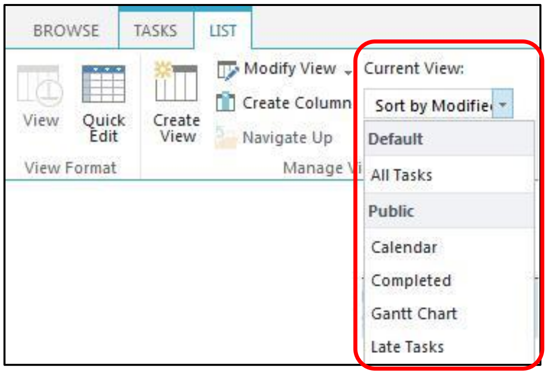
4. The **Create View** page displays. Complete the defining fields:
   - **Name**: Type a name for this view of the list. Make the name descriptive.
   - **Audience**: Select the option that represents the intended audiences: Personal View or Public View
   - **Columns**: Mark the checkboxes next to each column you want to show in this view.
   - **Sort**: Select columns to determine the order in which the items in the view are displayed. For example, if you want the content to display by Modified date in order to show most recently modified items on top, select Modified and Descending as sort criteria
   - **Filter**: Show all of the items in this view, or display a subset of the items by setting filters. For example, you may use Filter criteria to narrow the view to display only items Assigned to you. Select to filter by Show Items When: Assigned To is equal To <your name>.
5. Once you enter all applicable information, click **OK**

The new view filter option is now available in the List/Library tools view filter.

Using the View Filter

With multiple views available within a List or Library, users can quickly and easily sort and access relevant data. As described above, views can be created using a variety of criteria including all types of item attributes.

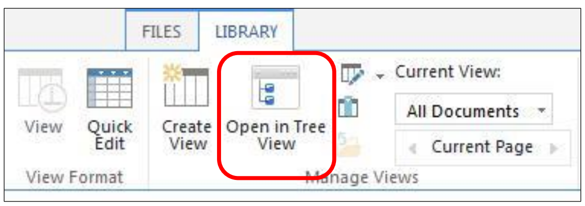
To access the views available within a workspace, simply access the List/Library toolbar ribbon and use the Current View dropdown menu to toggle between views.



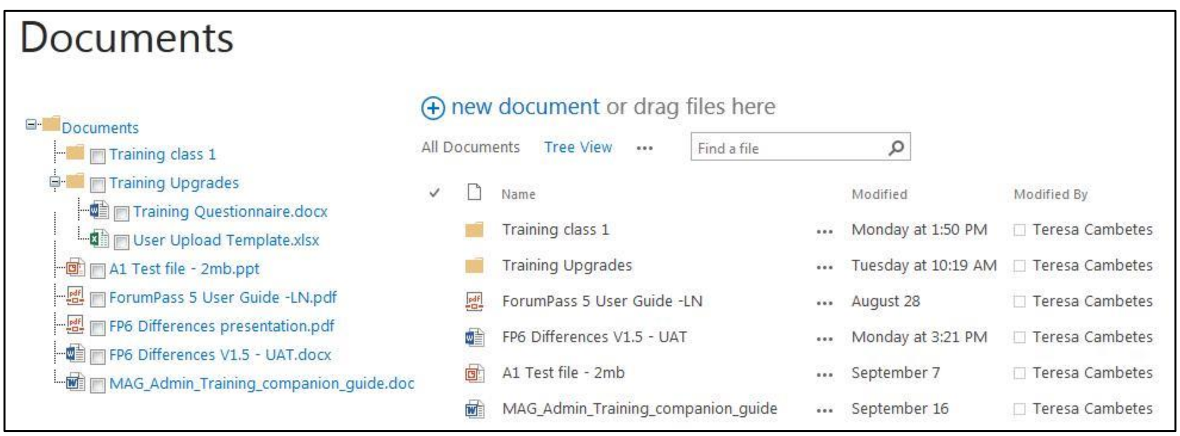
Open in Tree View

The Tree View option allows you to view List/Library content in a hierarchical navigational structure thus providing familiar Explorer navigation. This view allows users to easily maneuver through contents

In order to access this view, simply click **Open in Tree View** on the toolbar ribbon.



Tree view of a document library:

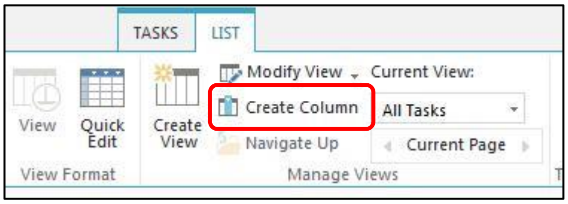


Create Column

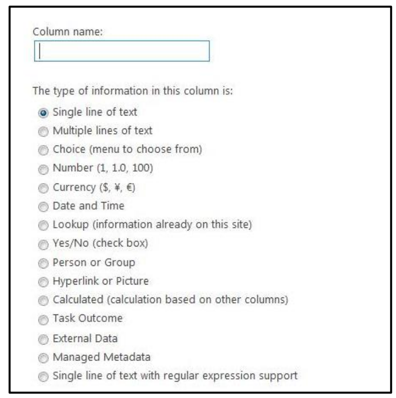
A column is an element of information about an item that is presented in a ForumPass App – list or library. Items in a list may be an event or a task, or they may be a document, web page or a business form, but no matter what the actual item is, columns provide a great way to further define and organize information beyond what is available via titles or folders. Columns can be easily added or modified within an App.

To create a Column:

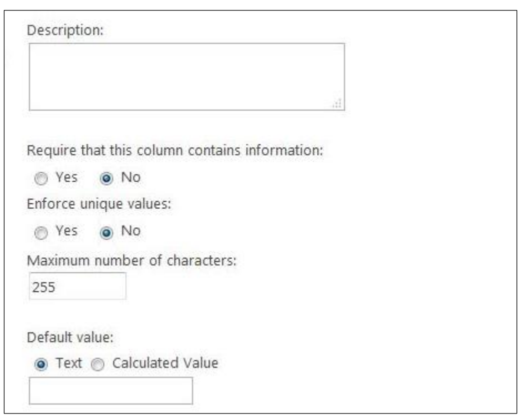
1. Open the List or Library toolbar ribbon. Click **Create Column**.



2. The **Create Column** page is displayed.
   - Enter a **Name** for the new column.
   - Specify the **type of information** you want your column to contain.
3. Enter a **description** for the data column.



Select if you would like to **Require** that data be entered for the column and if you would like to enforce unique values.

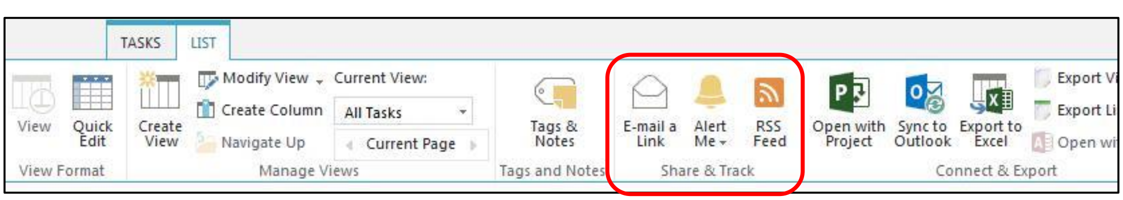


- Define the maximum number of characters allowed in the column and define the default value character types.
- Once all applicable information has been entered click **OK**

4. The Library/List is refreshed and the new column is displayed.

Container Sharing and Tracking

There are several commands within the List/Library toolbar ribbon associated with sharing and tracking information contained within the App.



E-mail Link

The E-mail a Link option allows you to share a link to this content container with others. Executing this command by clicking the icon will open the user's mail reader application. The New, or Compose, mail page is displayed and will contain a link to this site.

Alerts

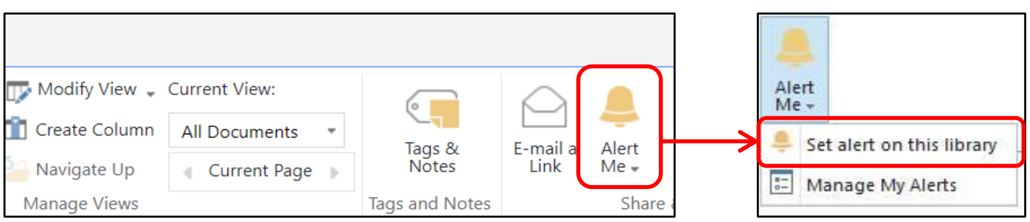
You may use alerts to stay updated when documents or items on your sites change. **Alerts** are used inform you about updates to items, folders, lists or libraries. Alert notifications are delivered via email, and you may customize how much information you receive and how often you want to know when specific items change.

An alert can be established for any single item, folder, list, or library. Alerts are most commonly used on the following object types:

- **A Single File:** Sends you an email if a specific file is changed. For example, a MS Word document, an image, etc.
- **A Folder:** Checks a folder; if it is modified or if a file is added, modified, or removed, you are notified. For example, in a document library.
- **A List/Library Item:** Checks a specific list item in any type of list; if the item is modified, you are notified. For example, libraries, announcements, discussions, tasks, etc.
- **A Complete List/Library:** Checks a specific list; if the list is updated, if a list item is added or modified, you will get an email.

When the Alert is set up, the user specifies several options regarding the Alert. To set up an alert:

1. Go to the library or list where you want to set the alert.
2. Click the **Alert Me** icon. Then select **Set alert on this library** option.



3. The **New Alert** page displays. Select the options you want for the alert:
   - **Alert Title**: Enter the title for this alert. The title is included in the subject line of the email notification sent for this alert.
   - **Sent Alerts To**: Enter your name or email address.
   - **Change Type:** Choose the types of changes that you want to be notified about.

- **Send Alerts for These Changes:** Specify under what circumstances you want an alert sent.

4. When all the criteria is set, click **OK.**

Once an Alert is created, you receive an email notification the specified alert was successfully created.

Receiving an Alert

Alerts are received via email based on the frequency that you selected when you created the alert. The Alert email contains information about the content that triggered the alert, and the following links:

- *<Site Name>* opens the project site page.
- **Modify My Alert Settings** displays the **My Alerts** on this Site page where you can update any of your alert settings for this site.
- **View <Item>** opens the item which triggered the alert.
- **View <List/Library>** displays the list or library in which the content is stored.
- **Mobile View** displays the mobile view of the item.

View and Manage My Alerts

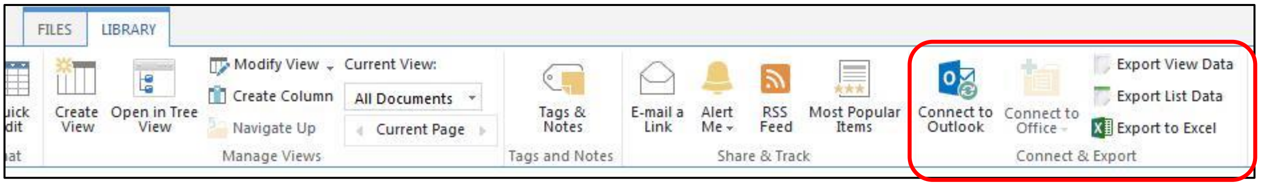
You can view and manage your alerts in two ways:

- Manage alerts via the **My Workspaces** page. This option allows you to manage all of their alerts.
  - From the **User Access Menu → My Workspaces → Alerts.**
- Manage alerts from within a Site. This option allows you to manage only site-specific alerts.
  - Go to site list or library → **Alert Me → Manage my Alerts.**

Site Owners have the ability to track all Alerts for a specific team site. To access this feature, go to: **Settings → Site Settings → User Alerts**. Alerts can also be deleted here by the Site Owner for a specific user.

Connect and Export from Apps

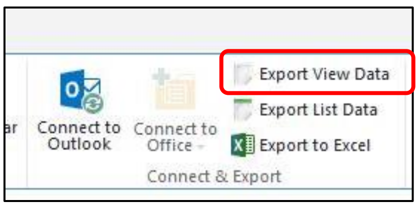
ForumPass offers several commands that allow you to export data and use Microsoft applications to analyze the data. These commands utilize the desktop integration features within ForumPass.



Export View Data

When working in a list or library, columns of data are displayed representing each item. When displaying a particular view of data, users may want to export this list view, including all displayed attributes, into an Excel workbook using **Export View Data**.

1. Go to the desired list or library. Open the **List or Library** toolbar ribbon.
2. Select **Export View Data.** A File Download dialog box is displayed.

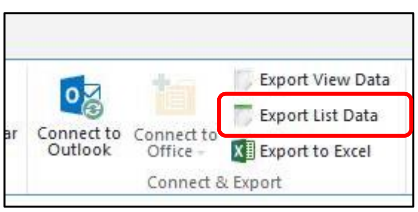


3. Select to **Open** or **Save** the file.
4. The Excel Workbook is created and opens displaying all View Data associated with the items in the list.

Export List Data

Beyond the View Data (data defined to be displayed by a particular view), additional attributes of data exist for each item within the list, although out of view. Users may use the Export List Data to export all of the associated data for each item into an Excel Workbook.

1. Access the list or library from which you would like to export the all list data.
2. Using the **List or Library** toolbar ribbon, select **Export List Data.**



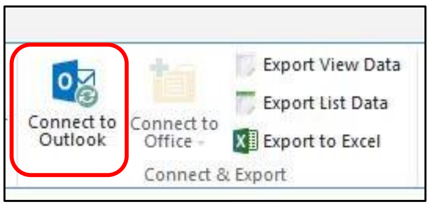
3. A File Download dialog box displays. Select to **Open** or **Save** the file. Click **Open**.
4. The Excel Workbook is created and opens displaying all List Data.

Connect to Outlook

ForumPass provides the ability to connect lists and libraries to your Outlook application. With this connection made, you can access files contained within ForumPass in order to browse or work on files via the Outlook application.

When a list or library is connected to Outlook, a folder called SharePoint Lists is created and will contain a link to each connected list or library. This feature is great for keeping up with your discussion lists and calendar lists, among others.

1. Access the list or library you would like to connect to Outlook.
2. Using the **List or Library** toolbar ribbon, select **Connect to Outlook.**



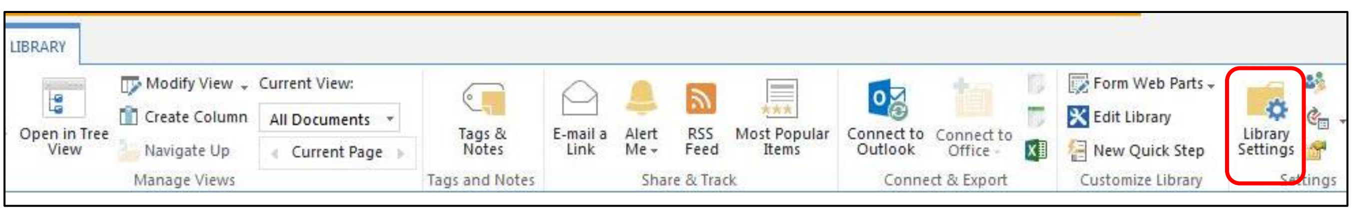
3. An Outlook confirmation page displays. To connect this list to Outlook, click **Yes**.

The list now displays in the SharePoint Lists folder. From here, you may view the content of the list, update content, or add new content.

***NOTE**: User must be logged into ForumPass in order to download files and update content.*

List/Library Container Settings

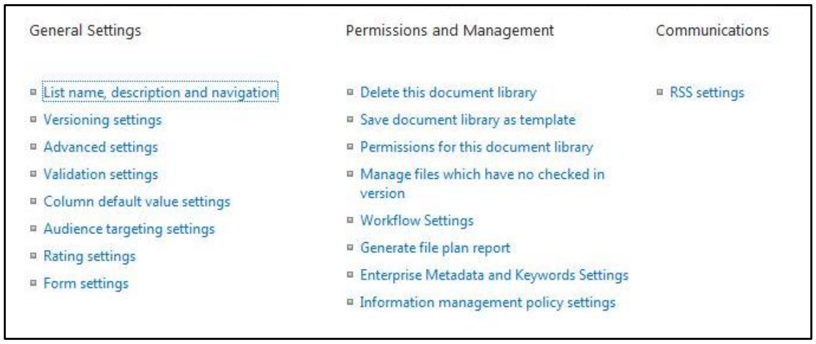
Each List and Library, or content container, has a collection of associated settings. When a content container is added to a project site collection, default settings are assigned which can then be reviewed and modified to suit the needs of the project. Default settings will include Permission inheritance, among other things.



To access the settings for an App, go to the **Library toolbar → Library Settings** page (or **List →**

List Settings).

NOTE: Several setting options, such as Columns and Views, were covered earlier in the document as they are also available commands available on the toolbar ribbon.



General Settings

The General Settings area governs how a library is configured, including title, description and navigation. It is also the area where versioning settings can be determined.

Although, we do not detail **Advanced Settings, Validation Settings, Audience Targeting and Rating settings** it is worthwhile to note that in these sections you can utilize Content Types to manage metadata and you can control users' ability to create new folders.

NOTE: *It is not recommended that you modify current Content Types. Instead, choose to create a new content type if you would like to incorporated changes.*

Title, Description, and Navigation

Title, Description and Navigation settings allow you to change the name of the library as well as update the description of the library. In the Navigation section, you may designate whether the document library will be displayed on the Quick Launch Area.

Versioning Settings

Versioning can be enabled within document libraries for all file types that can be stored in libraries. With versioning enabled:

- You can see when an item or file was changed and who changed it.
- You can see when properties or other information about the file were changed.
- And, you can view previous versions, or restore a previous version as your current version.

Libraries can track both major versions, and minor versions, while lists can track only major versions. Lists and libraries can also limit the number of versions that people can store. The default settings for the Shared Document Library do not include versioning.

- **Content Approval:** Allows you to require that all new or updated content in the library be approved before being made available in the Library. Items will remain with a Pending status until the Approval is complete, at which time the status is changed to Approved.
- **Document Version History:** Allows you to turn versioning on in the library. You can also set the type of versions that will be retained – *Major and/or Minor* – and you can limit the number of versions to be retained.

NOTES:

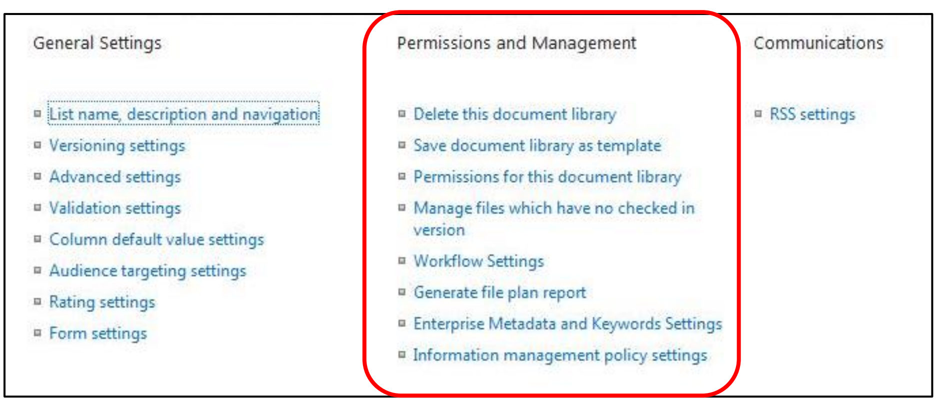
  - The maximum of versions is 50,000.
  - If you limit the number of versions that it stores, the oldest version is permanently deleted when the limit is reached.
  - If you delete the actual file, all of its versions are deleted with it. By default, when you delete a version, the version is sent to the Recycle Bin, where it can be recovered until it is permanently deleted.

- **Draft Item Security:** Used with the Content Approval Setting. If a library requires approvals, you can set who can see the draft versions of the items before they are approved.
- **Require Check Out:** Allows you to require that an item be checked out before it can be modified.

NOTE: If **Require Check Out** is set to **Yes** and a user completes a multiple file download all the files are marked as checked out and must individually be checked back in. The default setting for the Quick Start Template is **No**.

Permissions and Management Settings

The Permissions and Management area governs how document content is managed.



Delete this Document Library

This option will move the library and all of its contents to the Site Recycle Bin.

Save Document Library as Template

With proper permissions, you may choose to save the list or library as a template to be reused to create additional containers. Templates are stored at the Organization's site collection level.

Permissions for this Document Library

Sometimes a library may require a different set of permissions than the rest of the site. For example, a document library containing sensitive financial information should not be shared with everyone who has access to the site. See chapter on Permissions for more information.

Workflow Settings

Site templates will include the OOTB SharePoint workflows for Approval, Approval with Notification and Collect Feedback. In addition, the Quick Start Template has enabled two custom workflows: Notification and Review and Approve. .

A Workflow automates a business process by breaking it into a set of steps that users must take to complete a specific business activity, such as approving content, collecting feedback, or sending a notification. See chapter on Workflows for more information.

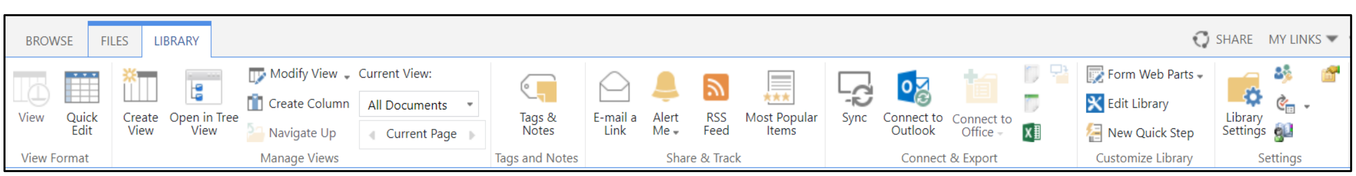
The Files Toolbar Ribbon

Each App, or content area, in ForumPass provides **toolbar ribbons** designed to help you easily locate and complete a command. While a ForumPass project site collection may include a variety of list and library apps, the process of managing content – whether creating, viewing, tracking or editing – within each app is handled similarly.

The Files toolbar ribbon (located on the left) is used to manage content contained within a Library.

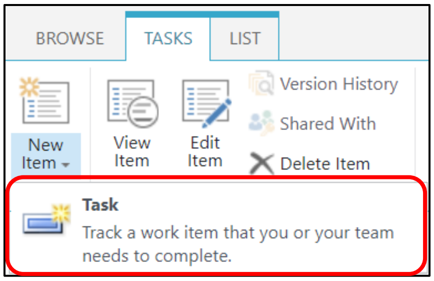
NOTE: The number and types of controls that are available on a toolbar ribbon may vary as they are dependent on the content and your permissions within the content area.

Files Toolbar Ribbon



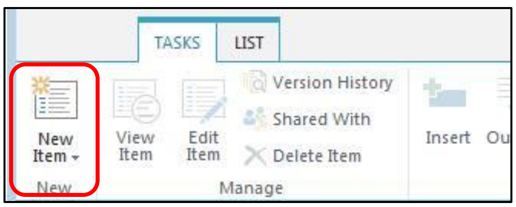
Create a New Item (Tasks list)

From the Quick Launch Menu, select **Tasks**. Then from the Toolbar Ribbon you will see the **Tasks** ribbon display, which allows users to add new items.



NOTE: In the case where a list is presented as a web part on your project site's home page, items may also be added directly from the project page via a link provided within that content area.

1. Working within a list, open the **Tasks** toolbar ribbon to display the command ribbon.
2. Click the **New Item** icon.



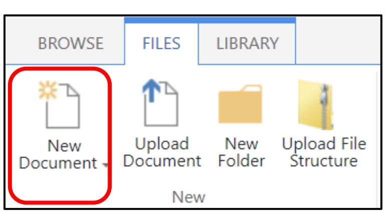
3. Complete the required fields and other information for the new item.
   For example:
   - To enter a Task list item, provide the Task Title, Due Dates, Assignees, etc.
   - To enter a Link list item, provide the URL and Name for the link.
4. Click **Save** to add the new item.

Create a New Document

ForumPass supports the creation of documents using desktop integration with the server using the **New Document** command on the **Files** toolbar ribbon. Users are not required to first create and store documents locally. Items can be created and stored directly on ForumPass servers.

To create a new document using desktop integration:

1. Working within a document library, open the **Files** toolbar ribbon to display the command ribbon**.**
2. Click the **New Document** icon. The MS Office application associated with the library will open by default.

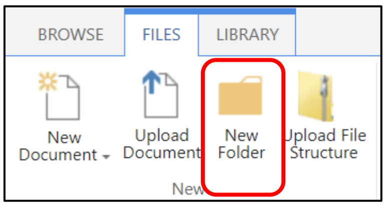


3. Working within the particular application, create the document. Click **Save** within the application and name the file. The file is automatically uploaded to the server as part of the project site.
4. The library refreshes and your new document is listed.

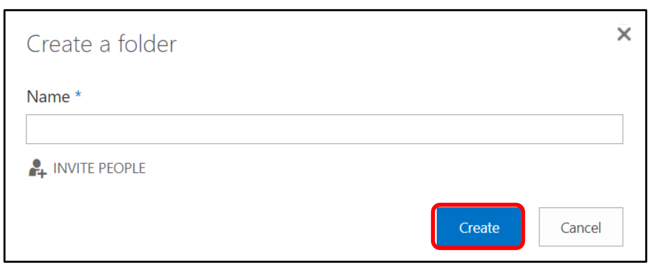
Create a New Folder

Folders are used in lists and libraries to organize items or documents. Users have the ability to create folders and sub-folders to store their files.

1. From the Quick Launch Area, click on the **Documents** library link to access that library.
2. Open the **Files** toolbar ribbon to display the command ribbon**.**



3. Click the **New Folder** icon. The **Create a folder** dialog box will display.
4. Enter the **Name** for the new folder. Then click **Create**.

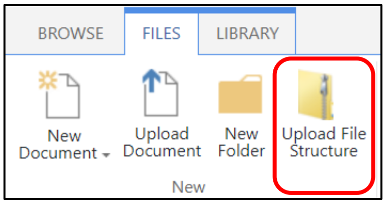


Add an Item

There are a variety of ways to add content to a list or library. As mentioned above, using desktop integration, users may create a file and store it directly in ForumPass. Or, users may choose to upload content from their local environment, or users may choose to Drag and Drop content into a library in ForumPass.

Upload Documents

1. Working within a document library, open the **Files** toolbar ribbon to display the command ribbon**.**

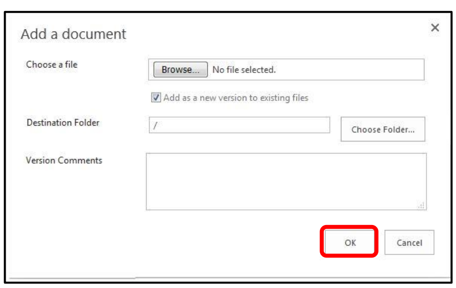


2. Click the **Upload Document** or **Upload File Structure** icon.
   - Upload Document allows you to upload an individual file.
   - Upload File structure option allows you to upload a zip file and extract the contents of the file into the currently selected folder.
3. Click **Browse** and locate the file you would like to upload.
   - You may choose a destination folder, or leave the field blank and the file will be uploaded in the currently location.
   - Add version comments, if applicable.
4. Click **OK.** The Documents Library is updated and your file now exists in your folder

Drag and Drop

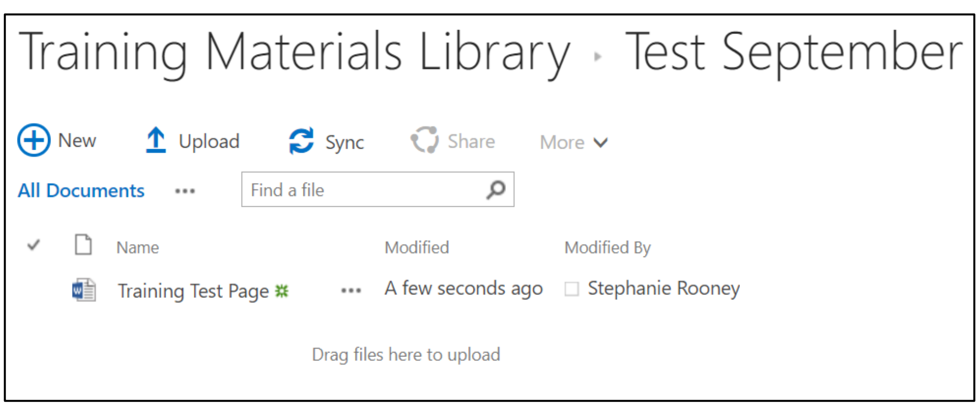
You can upload files to your team site, lists and libraries by simply dragging and dropping them from a local drive/folder on your computer. To **drag and drop** documents:

1. Open the Site Library page in ForumPass you want to upload the file to.



- From your computer, locate the file and document(s) you want to upload.
- Drag and drop the document(s) to the space in the library where it says **Drag files here.**

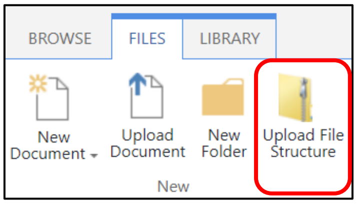
NOTE: You cannot drag and drop folders.



Upload a File Structure:

You can upload compressed file structures (or zip file). This allows you to compress multiple files for storage and transmission. To utilize this function:

1. From the **Files** toolbar ribbon, click the **Upload Files Structure** icon.



2. Click **Browse** and navigate to the compressed/zipped folder you want to upload.
3. You may choose a destination folder, or leave the field blank and the file uploads in the current location.
4. Click **OK**.

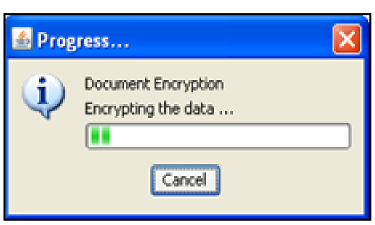
The library refreshes with your uploaded folder, and you can view your files.

Upload an Encrypted Item

Working within an Encrypted Document library is quite similar to working within a standard library. However, of course, content contained within an Encrypted Document library is transmitted and stored on ForumPass servers encrypted.

When uploading a file to an Encrypted Document Library, a progress bar displays as the content is being encrypted. Otherwise, the steps to upload are very similar.

1. When working within an Encrypted document library, select the **Upload Document** option.
2. Click **Browse** to navigate and locate the file you would like to upload. Click **OK** to proceed with upload.
3. The Progress dialogue box is displayed showing the Document Encryption progress.



4. The Encrypted Document Library is updated and the new file presented in the library.

Edit Existing Document

When editing documents contained in a list library, users have two options:

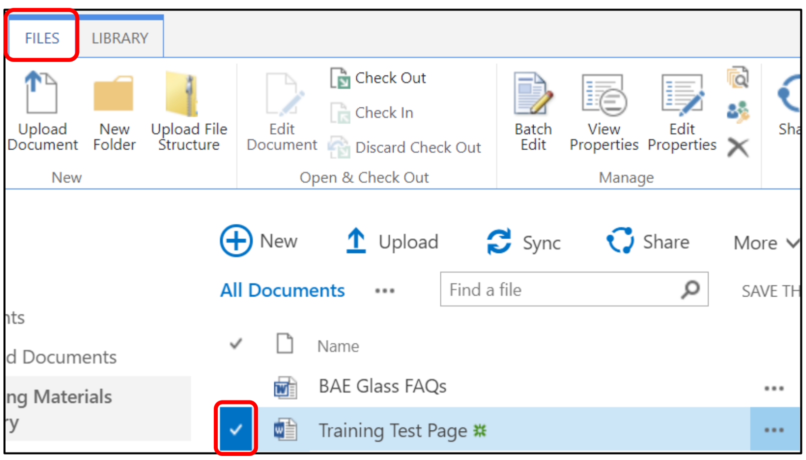
1. Update a document directly on the ForumPass servers using desktop integration.
2. Update a document locally.

When you want to **Edit** a document, you should always check the file out ***first***. This ensures no one else is modifying the document at the same time. ForumPass captures the checkout event, and marks the document as checked out, and prevents others from making simultaneous changes, potentially overwriting your work.

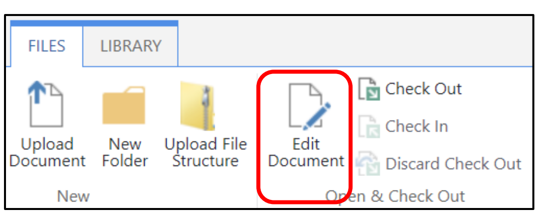
When a document is checked out its icon is denoted with a green ‘checkout’ icon . When you have the file check out, you may edit it online, or offline, and save it.

To edit an existing document in ForumPass:

1. Open the Site Library page, then select the **Files** toolbar ribbon.
2. Next place a checkmark next to the document you wish to edit.



3. Click the **Edit Document** icon.



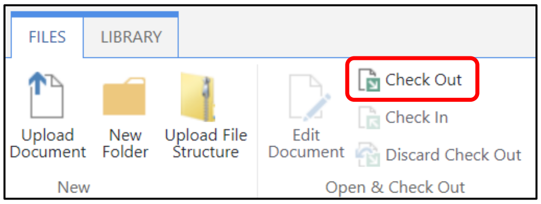
4. Edit the document as desired, and click **Save**.

NOTE: If the list is set up to track changes, a new version of the item will be created when you edit a list item.

Check Out, Download, and Edit a File

Check Out a Document

1. Go to the Site Library page where the file is saved. Then place a checkmark next to the document to select it.
2. From the **Files** toolbar ribbon, click the **Check Out** icon.



3. The object is checked out to you and the document icon is updated with the checked out indicator 

Edit a Document

With a document checked out, you can open the file to edit using desktop integration, or you may choose to download the file and edit it locally.
To edit a document:

1. To edit the document, click on the document name. The document opens in its native program.

   For example, an Excel document opens in Microsoft Excel. The document remains synched with the server.
2. Make the desired change to the file.
3. Click **Save** and close the document.
4. You are prompted to check the file in. Click **Yes**.
5. The file is saved on the server and the library is refreshed presenting the latest iteration of the document.

If you prefer to download and work on a local copy of a document, select to download a copy. With a copy stored locally, update the file and then upload the new version into ForumPass.

To download the file:

1. First, check out the file to be updated. (See steps above).
2. Then, select the file by placing a checkmark next to the document name.
3. In the toolbar, click the **Download a Copy** option and save a local copy of the file for editing.

Edit the document locally, as desired. Upon completion of your changes, you are ready to upload the new version on to the server.

To upload the updated file:

1. Working within a document library, open the **Files** toolbar ribbon to display the command ribbon.
2. Click the **Upload Document** icon.
3. Click **Browse** to navigate to the file that you would like to upload and check in.
4. Click **OK** to proceed with upload.
5. The new and updated document is uploaded and automatically checked in.

NOTE: You can choose to retain your check out if desired. The new version uploads and the document remains checked out to you.

Versioning

Versioning is available for list items in all default list types. When versioning is enabled, you can store, track, and restore items whenever they change. Versioning provides control over the content available in the site and can provide great value if there is ever a need to refer to an older version of a document, or to restore an older version.

Important Note: Versioning may only be enabled by users with permissions to manage the list. Additionally, versioning is turned on at the individual list level.

You can use versioning to:

Track history of a version: When versioning is enabled, you can see when an item or file was changed, and who changed it. You can also view any changed properties and any comments that were added when the updated item was checked back in.

Restore a previous version: If a mistake is made in a current version, or the current version becomes corrupt, or if you simply like a previous version better, you can replace the current version with a previous one. The restored version becomes the new current version.

View a previous version: You can view a previous version without overwriting your current version.

Versions are created:

- When a list items is first created or a file is uploaded.
- When a file is uploaded that has the same name as an existing file, and the **Add as new version to existing files** is checked.
- When the properties of a list items or file are changed.
- When a file is open, edited, and changed. A version is created when you click **Save**.

Version History

To view the version history for a file or list:

1. From the Quick Launch Area, click the desired list link. Select the file by placing a check in the check box.
2. Open the **Files** toolbar ribbon**.** Click the **Version History** icon. This opens the **Versions History** for this file.

Version History

Delete All Versions

No. ↓	Modified	Modified By	Size	Comments
4.0	11/24/2020 9:18 PM	Stephanie Rooney	50 KB	
3.0	10/28/2020 4:38 PM	Stephanie Rooney	50 KB	
2.0	10/28/2020 4:36 PM	Stephanie Rooney	50 KB	
1.0	9/8/2020 9:35 AM	Ashleigh Howell	50 KB	

From this page, you can view the details for a version, restore a previous version of the document or delete a version of the document.

NOTE: In order to view the content of a previous version of a document, you click on the version date/time stamp. The View menu option will require that you restore the document prior to viewing.

It is important to note when you restore a previous version of a document, the document becomes the current version of the document. The restoration of a document does not overwrite or delete previous versions. Instead, it creates a completely new version within the library.

Item Alerts

You can use alerts to stay updated when documents or items on your sites change. **Alerts** are used inform you about updates to items, folders, lists or libraries. Alert notifications are delivered via email, and you may customize how much information you receive and how often you want to know when specific items change.

An alert can be established for any single item, folder, list, or library. Alerts are most commonly used on the following object types:

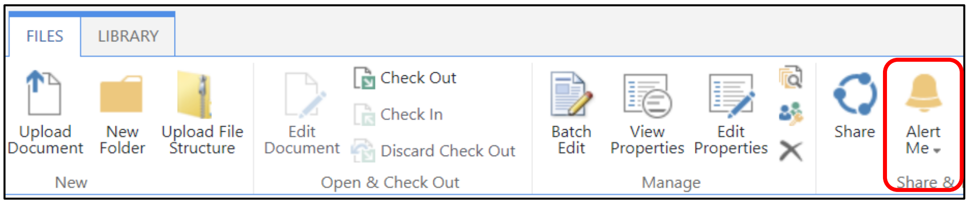
- **A Single File:** Sends you an email if a specific file is changed. For example, a MS Word document, an image, etc.
- **A Folder:** Checks a folder; if it is modified or if a file is added, modified, or removed, you are notified. For example, in a document library.

- **A List/Library Item:** Checks a specific list item in any type of list; if the item is modified, you are notified. For example, libraries, announcements, discussions, tasks, etc.
- **A Complete List/Library:** Checks a specific list; if the list is updated, if a list item is added or modified, you will get an email.

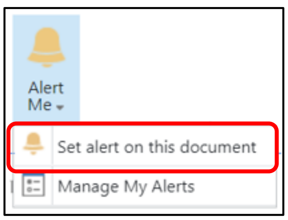
Create an Alert for an item

When the Alert is set up, the user specifies several options regarding the Alert.

1. Go to the library or list where you want to set the alert.
2. Select the item, list or library and then click **Files** ribbon**.** Click the **Alert Me** icon.



3. Click **Set alert on this document** option.

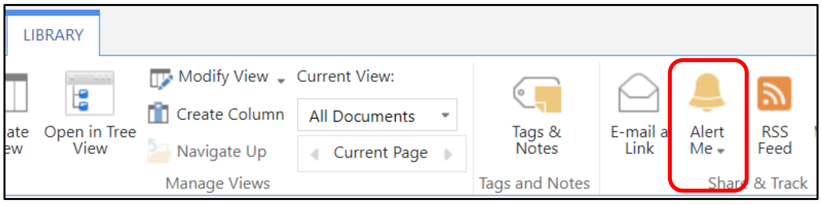


4. The **New Alert** page displays. Select the options you want for the alert:
   - **Alert Title:** Enter the title for this alert. This is included in the subject line of the email notification sent for this alert.
   - **Send Alerts To:** Enter your name or email address.
   - **Send Alerts for These Changes: S**pecify under what circumstances you want an alert sent.
   - **When to Send Alerts:** Specify how frequently you want to be alerted.
5. When all the criteria is selected, click **OK.**

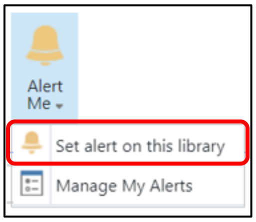
Create an Alert for a list or library

When the Alert is set up, the user specifies several options regarding the Alert.

1. Go to the library or list where you want to set the alert.
2. Access the list or library and then click **Library ribbon.** Click the **Alert Me** icon.



3. Click **Set alert on this library** option.



4. The New Alert page is displayed. Select the options you want for the alert.
    - **Alert Title:** Enter the title for this alert. This is included in the subject line of the email notification sent for this alert.
    - **Send Alerts To:** Enter your name or email address.

      NOTE: *If you have permission to manage alerts, you can also create an alert for another person by typing his or her information into the* ***Users*** *box.*

    - **Change Type:** Choose the types of changes that you want to be notified about.
    - **Send Alerts for These Changes:** Specify under what circumstances you want an alert sent.
    - **Send Alerts for These Changes:** Specify under what circumstances you want an alert sent.
    - **When to Send Alerts:** Specify how frequently you want to be alerted.
5. When all the criteria is selected, click **OK.**

Once an Alert is created, you receive an email notifying the specified alert was successfully created.

Manage Alerts

You can view and manage your alerts in two ways:

- Manage alerts via the **My Workspaces** page. This option allows the user to manage all of their alerts.
    - From the **User Access Menu → My Workspaces → Alerts**
- Manage alerts from within a Site. This option allows the user to manage only their site specific alerts.
    - Go to site list or library → **Alert Me → Manage my Alerts**

Site Owners have the ability to track all Alerts for a specific team site. To access this feature, go to **Settings → Site Settings → User Alerts**. Alerts can also be deleted here by the Site Owner for a specific user.

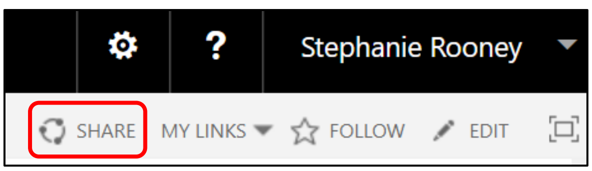
Share

Sometimes when working in a team site, you may want to share a specific document or folder with colleagues who do not otherwise have access to the site. With the Share command, you may quickly and easily share sites or files and control what the users can do with the file (read, write, etc.)

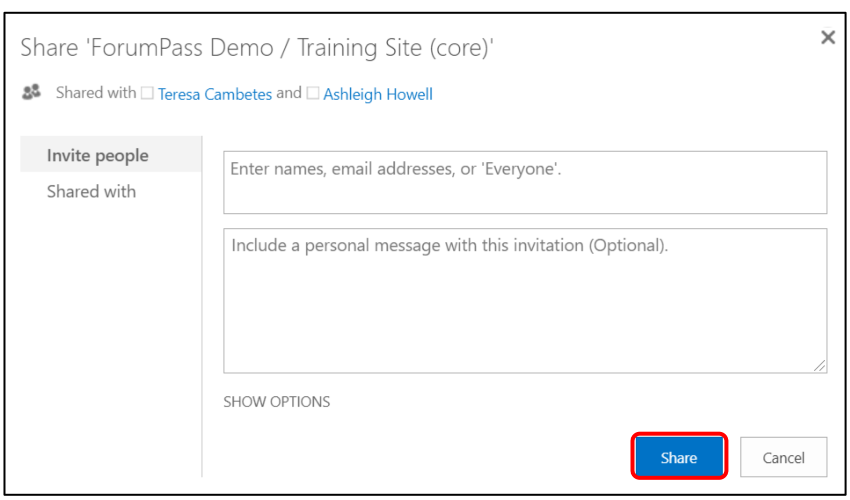
The Share command (icon) is located throughout ForumPass. On project site pages, you find the Share icon as part of the upper-right navigational elements; and in lists, the Share icon is part of each toolbar ribbon.

Steps to share a site:

1. Access the site that you would like to share with a colleague.
2. Click **Share** in the upper-right navigation.



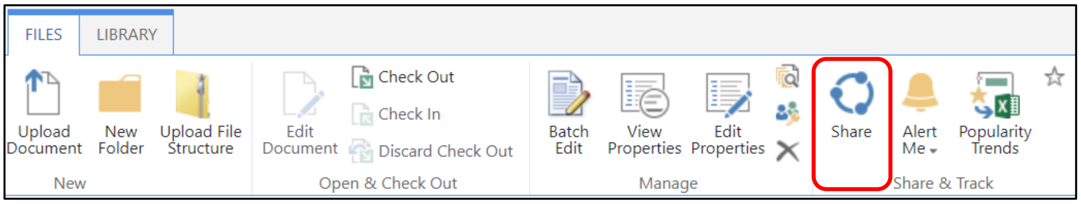
3. The Share <site name> page is displayed. Enter the user names or email address. Share with Everyone is restricted in ForumPass 6. Include a personal message to be delivered to the newly added users, if desired.



4. Click **Share**.

Steps to share a file

1. From the Quick Launch menu, click the list you want to share.
2. Open the **Files** toolbar ribbon and click **Share**.



3. The Share <file name> page displays. Enter the user names or email address. Share with Everyone is restricted in ForumPass 6. Enter a personal message, if desired.
4. Choose a level of permissions to be assigned to the users.
5. Click **Share.**

Permissions

ForumPass provides the security that allows site owners to control access to their sites, and specify what permissions are assigned to users. In addition, permissions can be configured on all securable objects within a site including: lists, libraries, folders, documents, and individual items.

Security and permissions for your site, and site content, include several standard elements:

- **ForumPass Group**: A group of users defined in order to assign and manage permissions. Groups can be created at an organization site collection level or project site levels and are available for inheritance to sub sites. Groups are assigned permission levels and can also be used for email distribution lists.
- **Users**: A person with a ForumPass account and access to the project site. User permissions can be granted *directly* to a securable object in ForumPass, or *indirectly* by adding the user to a Group which has access to the object.
- **Permissions**: Authorization of specific actions such as view an object, edit object, and create object.
    - **Permission Level**: A defined collection of permissions assigned to an individual user or group on an object such as a list, library, folder, item or document.
        - **Securable Object**: An object on which permissions can be configured. By default, users and groups are assigned permission on a site level and lower level items inherit those permissions; however, securable objects can maintain unique permissions.

If a user is granted multiple permissions, for example the user is added to two Groups with different permission levels, their permissions will be cumulative and higher levels of permissions will prevail. So, if the user has Read permission *and* Contribute permission on the same site or object they will not be restricted to Read only.

NOTE: The Site Collection Administrators have access to and control over all sites within the organizational site collection. They can perform the same actions as a Site Owner on any site in the collection.

Groups and Users

Generally, access to sites and securable objects is controlled by listing users in ForumPass Groups for management of permissions. Groups that are created at the Organization Site Collection level can be inherited by the Project Sites and/or unique Groups can be created for your particular Project Site.

It is typically easier to manage permissions using groups rather than assigning permissions to each individual user. For example, you may create a group that contains the list of organization managers, and that could be called the 'Managers Group'. This 'Managers Group' could be granted Write permissions on sub site 1, Read permissions on sub site 2, and Full Access on sub site 3.

In addition to all of the Groups that have been created within the Site Collection, there are three default Groups within each project site to which you may add users. The permissions associated with these default groups can also be modified.

- **<Project Site Name> Owners:** This user group is assigned Full Control permissions which gives the users full control over the content item, list, library, or site.
- **<Project Site Name> Members:** This user group is assigned Contribute permissions which give the users management rights (including the ability to delete) over content items, lists, and libraries.
- **<Project Site Name> Visitors:** This user group is assigned Read permissions which gives the users Read only rights over the content item, list, library, or site. The user can not make any changes to content.

Sub Site Permissions

Sub sites can either use the same permissions as the parent site by inheriting site groups and users from the parent site, or use unique permissions by breaking permissions from the parent site and creating unique groups and user permissions.

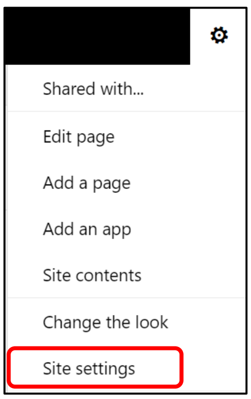
Manage Permission Groups

Site groups are used to manage site-wide security and permissions, and each user should be included as a member of at least one site group. Each site group possesses an assigned permission level or rights which define the actions that users within that group can perform, such as Manage Lists.

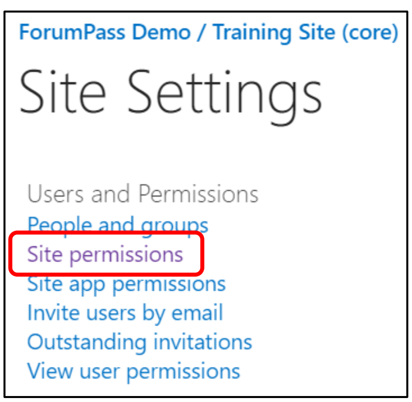
Create a New Group

To create a new Group to manage users and permission within your project site follow the steps below:

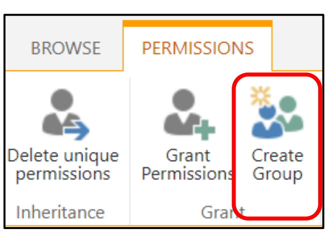
1. Access the site for which you want to modify users and groups.
2. Open the Settings menu and select **Site Settings.**



3. The Site Settings page displays. Select **Site Permission.**



4. Select **Create Group** from the **Permission Tools** toolbar.



5. The Create Group page is displayed.
    - **Name** and **About Me** description: Type a name and a description for the group.
    - **Owner:** Specify the group owner. The owner can add and remove members or delete the group.
    - **Group Settings:** Specify who can view and edit the membership of this group.
    - **Membership Requests:** Select desired settings to govern how users request and manage membership in this group.
    - **Give Group Permission to this Site:** Specify the permission level or set of permission levels you want to assign to this group.

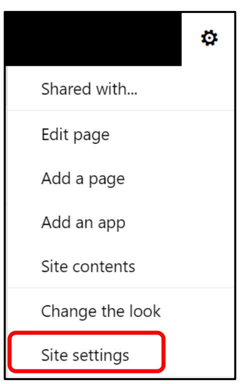
    NOTE: This option is not available if the site is inheriting permissions.
6. Click **Create**.

It is important to note that when creating new groups in ForumPass, each group must be unique to the Organizational Site Collection. For example in Site A if you have an "Engineer" group you may not create an "Engineer" group in Site B, if both Site A and B are within the same Organizational Site Collection.

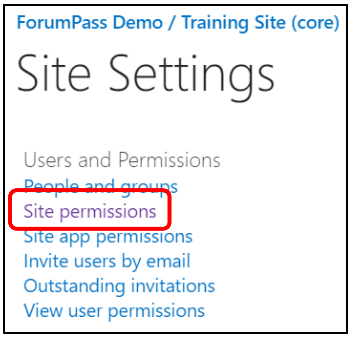
Change Group Settings

Steps to modify settings associated with an existing group:

1. Access the site for which you want to modify users and groups.
2. Open the Settings menu and select **Site Settings.**

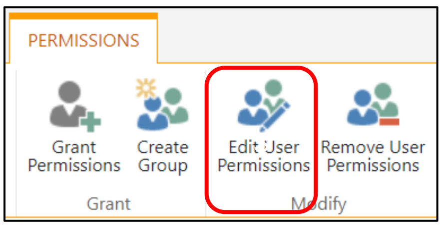


3. The **Site Settings** page display. Select **Site Permissions**.



4. Place a checkmark next to the group you want to modify. Click **Edit User Permissions**.

NOTE: Select **Stop Inheriting Permissions** if the site does not have unique permissions.



5. On the **Edit Permissions** page, select the desired permission settings for this group.

NOTE: Manually de-select any existing checkmarks that are no longer valid.

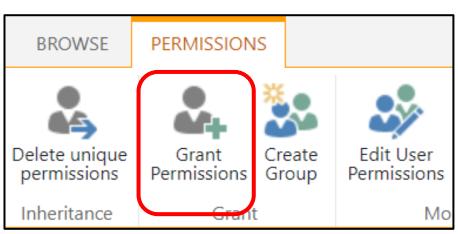
6. Click **OK** to save the changes.

Grant/Remove User Permissions

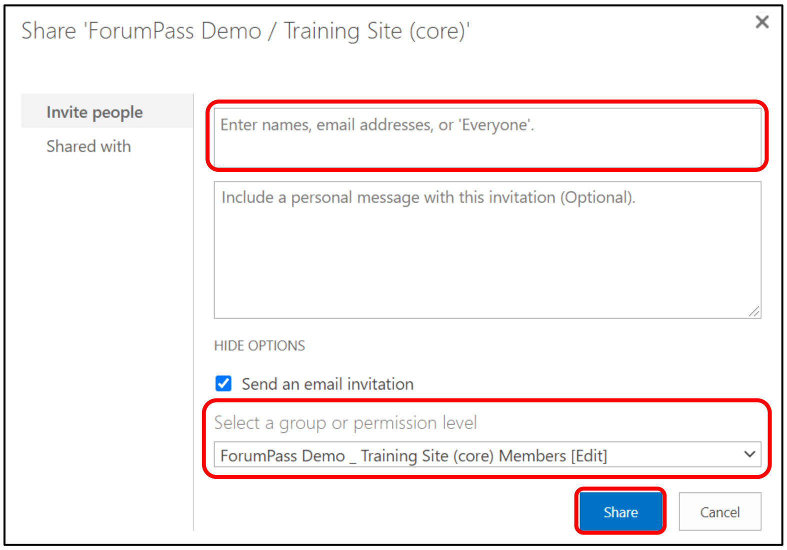
With Permission Groups established with appropriate permission settings, users will then be added to the groups. There are a variety of ways to grant a user permissions to a site including: via Site Permissions, using the Share option, or Invite by Email.

Steps to Grant Permissions via Site Permissions page:

1. Access the site for which you want to modify users and groups.
2. Open the Settings menu and select **Site Settings.**
3. The **Site Settings** page displays. Select **Site Permissions.**
4. Place a checkmark next to the group to modify. Click **Grant Permissions**.



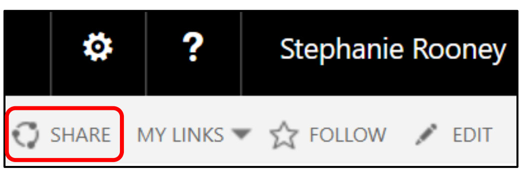
5. On the **Share <project name>** page, enter the users' names or email addresses. Click **SHOW OPTIONS** to select or change the permissions group association.



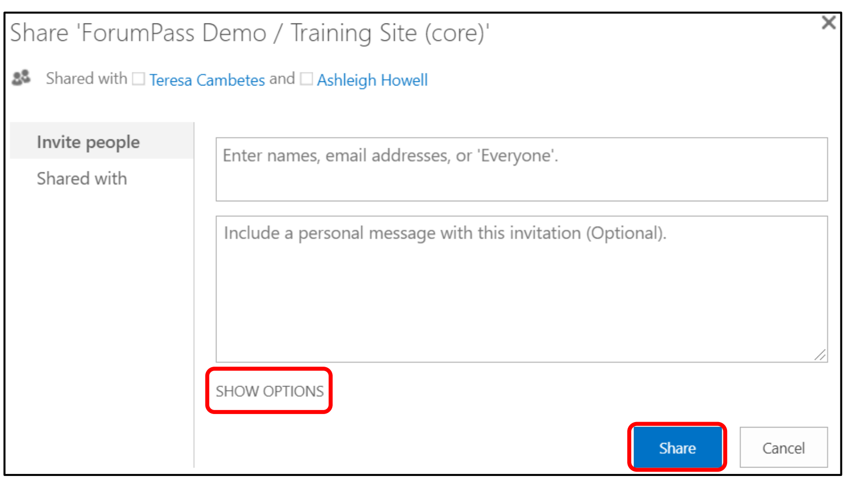
6. Click **Share.**

To grant permissions via Share option:

1. Access the site for which you want to modify users and groups.
2. Select **SHARE** from the upper right navigation.



3. On the **Share <project name>** page, enter the users' names or email addresses.



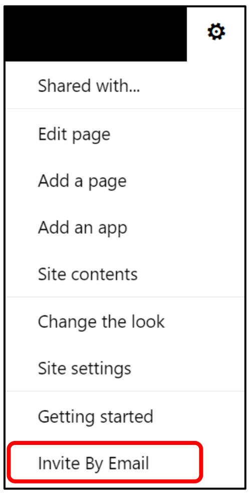
4. Click **SHOW OPTIONS** to select or change the permissions group association.
5. Click **Share.**

To Grant Permissions via Invite by Email:

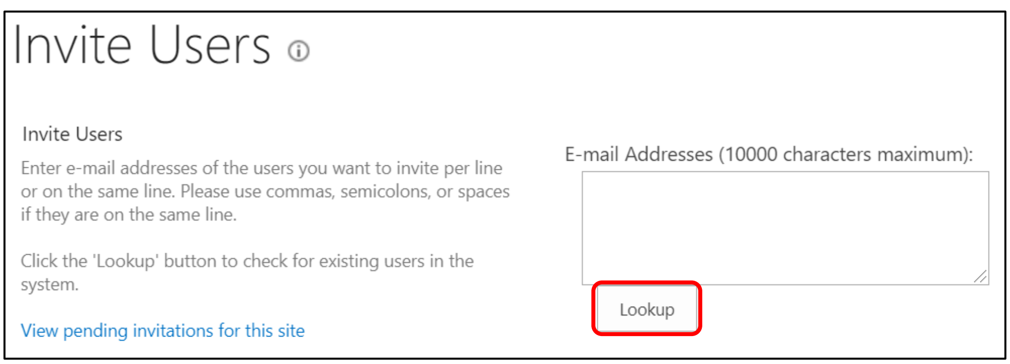
When working in a Project Site, users can be invited to join the site, and, in turn, be granted permissions using the **Invite User by Email** functionality. This allows you to add a user to a Group and then list them as a user in the site.

You can differentiate between users who do not have access to ForumPass and which users are not subscribed to a particular ForumPass environment.

1. Access the site for which you want to modify users and groups.
2. Open the **Settings** menu and select **Invite by Email.**



3. The **Invite Users** page displays. Enter the email address of the user. Click **Look up.**



NOTE: If the user does not have a ForumPass account, hover your mouse over the information icon to view additional details.

4. Place a checkmark next to the user's email address.
5. Choose the permissions you want to assign the user.
6. Optionally, enter a personal message to include in the email notification sent to the user.
7. Click **OK**.

To remove individual user/permissions from a Site Collection:

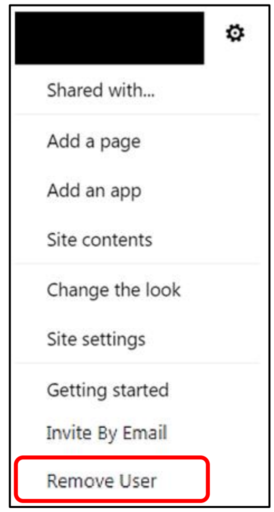
A Site Collection Administrator can permanently remove a user's access to a ForumPass site collection. The process permanently removes a named user from all permission groups in all sites and sub sites within a site collection.

To remove a user:

1. Any Site Collection Administrator has the **Remove User** link in the **Settings** gear dropdown.

   NOTES:

   - A Site Collection Administrator cannot remove anyone outside of their organization.
   - You can also access the feature by: Settings gear > Site Settings > Users and Permissions > Remove User from Site Collection.
   - All users will see the **Remove user from site collection** option in the Users and Permissions group, but it is only functional for SCAs.



2. Enter the name of the person you wish to remove. **People Picker** provides a list of names from which to choose. Select the user you want to remove. Click **OK**.

The user and all permissions associated with that user are permanently removed from the site collection and all SCAs receive email confirmation.

Securable Object Permissions

Permissions can be more finely managed by setting unique permissions on a per-list or per-object basis. Securable Object permissions override site-wide permissions for the object (lists, libraries, folders, items, and documents).

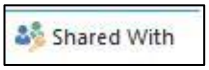
For example, a document library containing sensitive financial data may restrict access to that library or to specific documents contained in the library, so that only the specific users or group can view it.

As lists and libraries are created within a site collection, they inherit the permission settings from their parent site. These library permissions can be viewed and managed as described below.

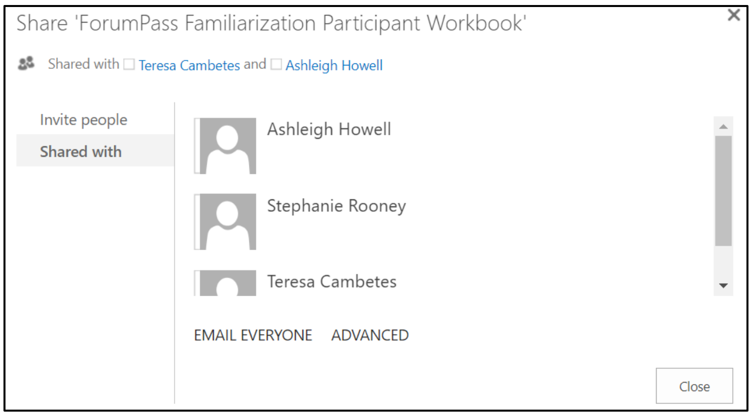
View User/Group Permissions for Securable Object

1. Open the list or library for which you would like to view users and groups.

2. Access the **List** toolbar ribbon Click the **Shared with** icon located on the far right of the ribbon.



3. The **Shared with** page displays the list of all users who have access to the list.
   - **Invite People**: Grant additional users permissions to this content.
   - **Email Everyone**: Sent an email all of the listed users.
   - **Advanced**: View permission groups. Click a group to see the list of users.



Modify User/Group Permissions for App

With owner rights, you can adjust the permissions on a list or library so that only a group or subset of users can access the information contained within.

1. Open the list or library for which you would like to view users and groups.
2. Access the **List** toolbar ribbon Click the **Shared with** icon located on the far right of the ribbon.

3. The Shared with page displays the list of all users who have access to the list.
   - **Invite People**: Grant additional users permissions to this content,
   - **Email Everyone**: Sent an email all of the listed users.
   - **Advanced**: View permission groups. Click a group to see the list of users.

4. Click **Advanced**.

5. Click **Stop Inheriting Permissions**. You receive a warning you are about to disconnect from the permissions of the parent site. Click **OK** to continue.

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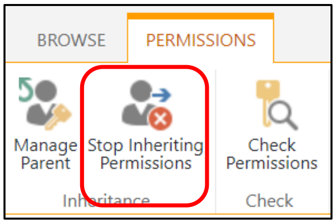
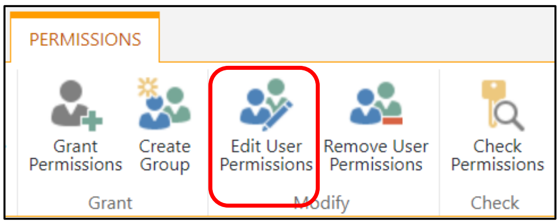
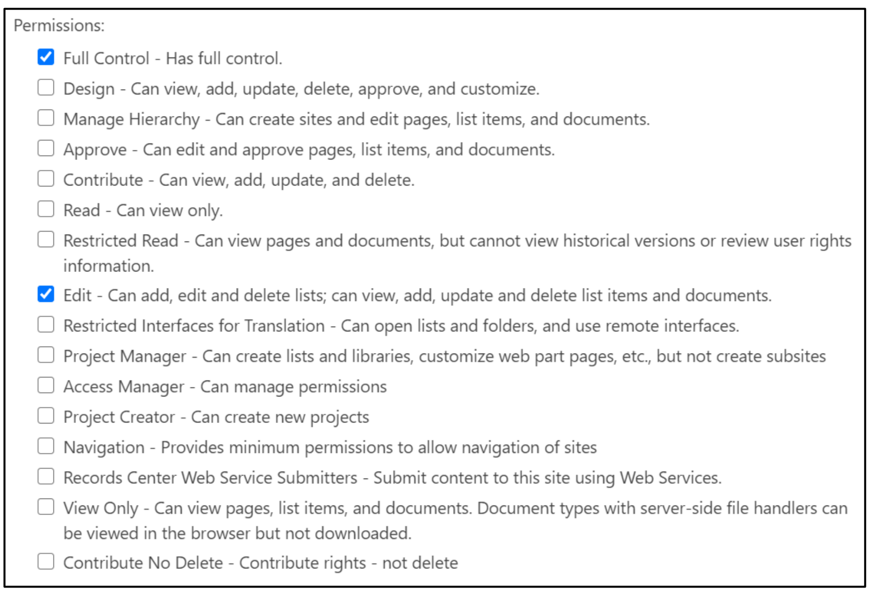


6. To modify the permissions assigned to an existing user or group, locate and select the user or group by placing a checkmark beside the name.
7. Click **Edit User Permissions.** A list of permission levels displays.



8. From the list, select the appropriate permissions for the user or group.

NOTE: Manually remove any existing checkmarks that are no longer applicable.

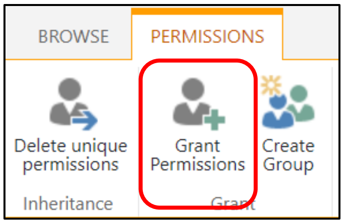

Permissions:

- [x] Full Control - Has full control.
- [ ] Design - Can view, add, update, delete, approve, and customize.
- [ ] Manage Hierarchy - Can create sites and edit pages, list items, and documents.
- [ ] Approve - Can edit and approve pages, list items, and documents.
- [ ] Contribute - Can view, add, update, and delete.
- [ ] Read - Can view only.
- [ ] Restricted Read - Can view pages and documents, but cannot view historical versions or review user rights information.
- [x] Edit - Can add, edit and delete lists; can view, add, update and delete list items and documents.
- [ ] Restricted Interfaces for Translation - Can open lists and folders, and use remote interfaces.
- [ ] Project Manager - Can create lists and libraries, customize web part pages, etc., but not create subsites
- [ ] Access Manager - Can manage permissions
- [ ] Project Creator - Can create new projects
- [ ] Navigation - Provides minimum permissions to allow navigation of sites
- [ ] Records Center Web Service Submitters - Submit content to this site using Web Services.
- [ ] View Only - Can view pages, list items, and documents. Document types with server-side file handlers can be viewed in the browser but not downloaded.
- [ ] Contribute No Delete - Contribute rights - not delete

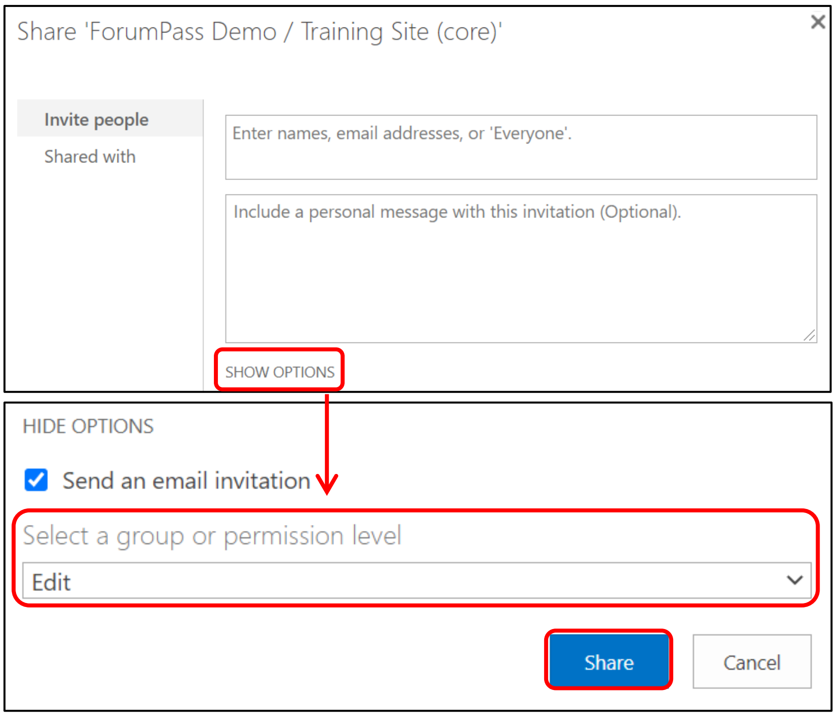
9. Click **OK** to save the permission settings.

Grant User Permissions for Securable Object

1. Open the list or library for which you would like to view users and groups.
2. Access the **List** toolbar ribbon. Click the **Shared with** icon on the far right of the ribbon.
3. Choose a permission group, and select **Grant Permissions** on the **Permission**s toolbar.



4. On the **Share <list name>** page, enter the users' names or email addresses. Click **SHOW OPTIONS** to select or change the permissions group association.



5. Click **Share**.

Permission Levels

Permission Levels allow for the assignment of permissions to users and groups in ForumPass so that they can perform specific actions within the site. The following table lists and describe the default permission levels that can be assigned to users and groups.

Permission Level	Description
Full Control	Contains all permissions.
Design	Can view, add, update, delete, approve, and customize.
Edit	Can add, edit and delete lists, can view add update and delete items
Contribute	Can view, add, update, and delete list items.

Read	Can view pages and list items and download documents.
Limited Access	Can view specific lists and items when given permissions
Approve	Can edit and approve pages, list items, and documents.
Manage Hierarchy	Can create sites and edit pages, list items, and documents.
Restricted Read	Can view pages and documents, but cannot view historical versions or review user rights information.
Project Manager	Can create lists and libraries, customize Web Part pages, etc., but not create sub sites.
Project Creator	Can create new projects.
Navigation	Can navigate sites with minimal permissions.
Access Manager	Can manage permissions.

User and/or groups can have more than one permission level assigned and the permissions are cumulative. If there is a contradiction in permissions (Read only and Contribute are both assigned), the higher level of permissions is assigned.

Viewing Permission Levels

Permission levels are managed at the site level. Beyond the system default permission levels, new permission levels can be created, and existing permission levels can be copied or modified by Site Collection Administrators.

To view the permission levels associated with your organizations site collection go to **Settings → Site Settings → Site Permissions → Permission Levels.**

Web Parts

When you add an App in a ForumPass project, a corresponding Web Part is automatically generated. You can think of Web Parts as mini-applications or modules that display information on a page or perform a special function. Web Parts can perform a number of functions including allowing a user to add custom text and images to a web page, to displaying a financial report based on information stored in a separate application. Within a ForumPass site, a user with the proper permissions can add Web Parts to existing sites.

Web Part Pages

One important things to note about Web Parts is that a user may only add them to a special type of page known as a Web Part page. A Web Part page usually consists of Web Part zones – or areas where you add Web Parts. The site template determines the layout of the zones on the page.

Generally, a template has a header, columns for the middle sections and footer. Each Web Part can act independently of others on the page or they can be connected or organized in a way that best suits the needs of the user and organization.

Adding and Editing Web Parts

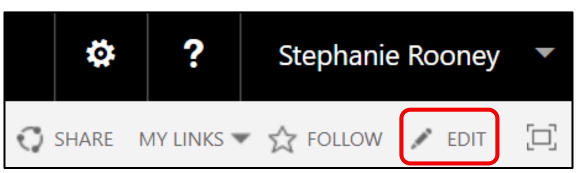
Only users who have the ability to manage site structure and content within a specific site will be able to modify sites using Web Parts. With proper permissions, the user can access the Web Part gallery by selecting Edit Page from the Site Actions menu.

From the Edit mode the following actions can be performed:

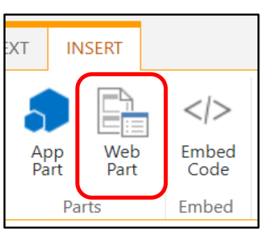
- Add Web Parts to a Web Part Zone
- Drag Web Parts from Zone to Zone
- Change Properties of a Web Part
- Browse for Web Parts
- Import Web Parts to a Page
- Search for Web Parts

You can add a Web Part and edit a Web Part through the following steps:

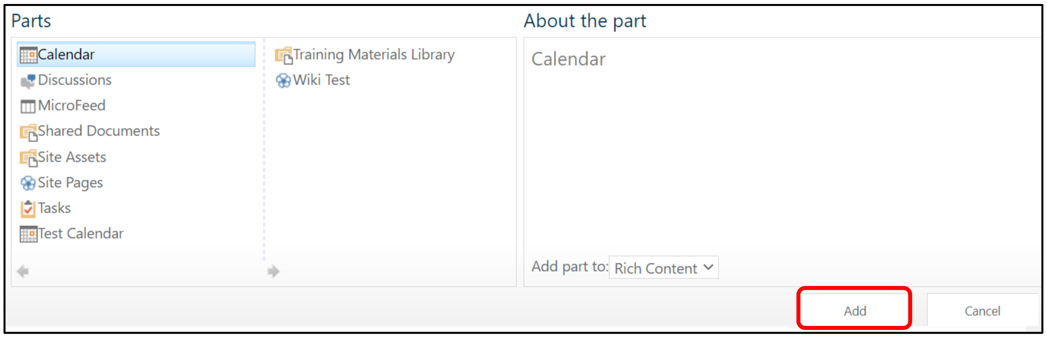
1. Navigate to the site where you wish to add the Web Parts, select **Edit.**



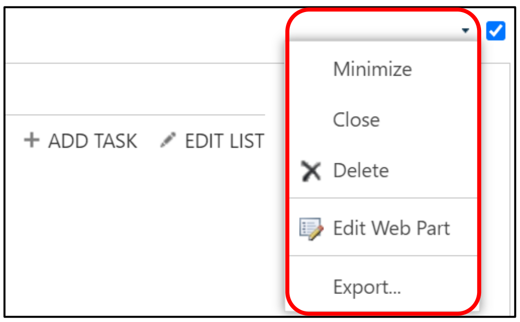
2. From the Insert toolbar ribbon, select **Web Part** to add. A list of Web Part Categories is displayed.



3. In the **Parts** section, select the desired web part. Click the section of the web part page in which you would like to insert, and click **Add**. The screen automatically refreshed with the new web part.



4. To edit a Web Part that currently exists on the page, click the down arrow in the upper right corner of the Web Part.



5. The edit menu is displayed where the user can select to **Minimize, Close, Delete, Edit,** or **Manage the Web Parts connections** to data sources.

6. When you make all your updates to the Web Part page, click **Save.**

Web Part Templates

See **Appendix B** for a complete list of Web Part Templates.

Working with Workflows

A workflow automates a collaboration activity by breaking it into a set of actions that users must take in order to complete a specific business process, such as approving content, obtaining feedback, or routing a document from one location to another. Workflows allow organizations to define the steps involved in a business process in order to insure consistency, accountability, and an audit trail. Organizations benefit from improved efficiency and productivity by managing the tasks and steps involved with workflows.

Workflows are created based on templates, which have pre-defined steps, and a handful of options. Once a workflow has been created, it can be made available within lists, libraries, and contents types.

About Workflows

Understanding the Workflow Templates

ForumPass offers several workflow templates to organizations for implementation within their Organizational site collections. The templates that are available within your project site collections may depend on your organizational settings. In addition, custom workflow templates can be created by site administrations for use within their project site collections.

The following default Workflow templates are available.

- **Approval:** Routes a document for approval, tasks are assigned based on how the approvers are listed in the workflow. Users in the CC list shall not receive any email upon start of the workflow, but shall receive an email upon completion of the workflow.
- **Approval with Notification: F**unctions as an Approval workflow with the following updates: the workflow initiator shall be able to add external users' email addresses on the workflow initiation form, such that the external users are notified of the workflow status after the workflow is completed, the users in the CC list (both external and internal users) shall not receive any email upon start of the workflow, but shall receive an email upon completion of the workflow and the workflow association form shall provide the ability to add external user's email addresses.
- **Collect Feedback:** Routes a document for review by one or more members of the site chosen by the workflow author. The Collect Feedback workflow is defined as parallel by default so that all reviewers receive email notification and are assigned a task at the same time. Participants can optionally delegate their tasks or decline to participate.
- **Notification:** Provides the ability to alert a group of individuals of the status of a file to which they have been assigned. This type of workflow is used to communicate information and does not require a response from any of the participants.
- **Review and Approve:** This is a two-stage workflow. In the first stage, this workflow shall allow an object to be routed to one or more reviewers. Once the review is complete, or deadline to review passes, it is routed to an approver or group of approvers.
- **Three-State:** Routes a document out for three levels of approval. The ability for the document to be routed from one level to the next is dependent on approval at the previous level. Approvers shall be able to approve or reject the document, reassign the approval task or request changes to the document. The Three State workflow is currently enabled in ForumPass Lists.

Enabled workflows vary from site to site depending on how the site was created and how permissions were set.

Workflow Implementation

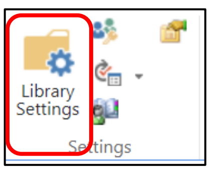
There are two steps involved in making workflows available for use within your project site. At the top level, the Site Collection Administrator must enable the workflow functionality within your organizational site collection.

Then, when your specific project site is created, the Site Creator or Owner will define the lists and libraries that will support specific workflows. In order to add a workflow to a list, library or content type the user must have Manage List permissions.

The availability of workflows available will depend on how it is added to the site:

If a workflow is added to...	It becomes available for...
A list or library	All items within that list or library
A specific content type in a list or library	Items of that content type within that list or library
A specific content type in a site	Items of that content type within the site

When a workflow is created within a list, library or content type, it can be customized with several setting options including:



- **Name the workflow**: Assign a name for the workflow that is easily understood by team members.
- **Task location**: Identify where the tasks associated with this workflow are listed.
- **History location**: Identify where the history records associated with this workflow are listed.
- **Task Routing**: Define how the tasks for this workflow are routed to assignees.
- **Workflow Completion**: Set under what conditions the workflow is assigned a completed status.

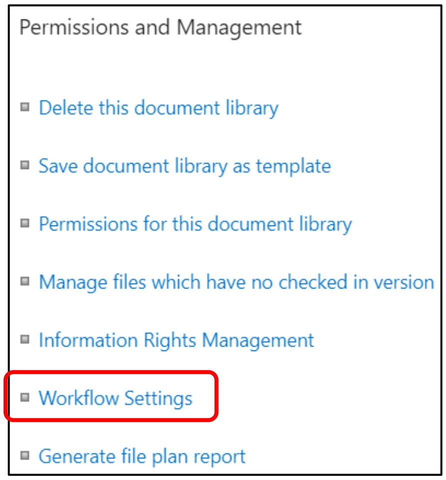
Add a New Workflow type

A List or Library owner can create a new workflow to be implemented into a list or library.

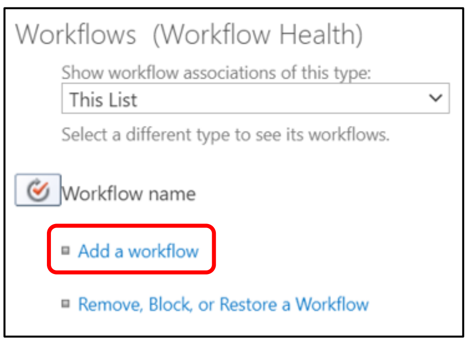
NOTE: Workflows must be activated by Site Collection Administrators and added to a document library by Site Owners before they can be utilized.

1. Open the list or library in which you would like to create a new workflow type.
2. Access the **Library** toolbar ribbon. Click **Library Settings**.

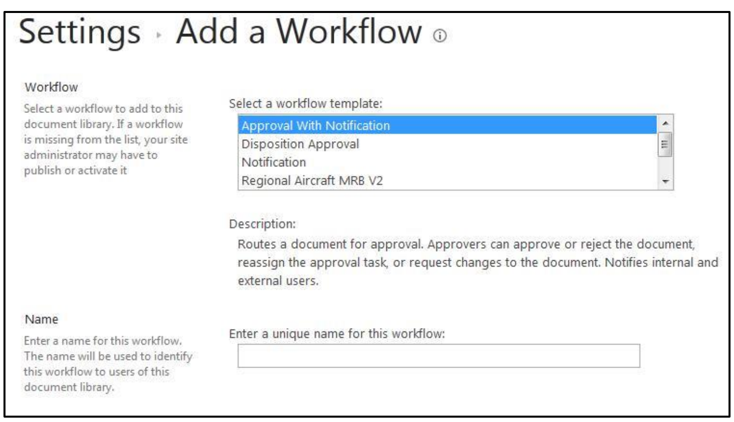
3. In the **Permissions and Management** section, select **Workflow Settings**. The Workflow Settings page display.



4. From here you can add or remove a workflow, edit a workflow, or view workflow reports. Click **Add a Workflow.**

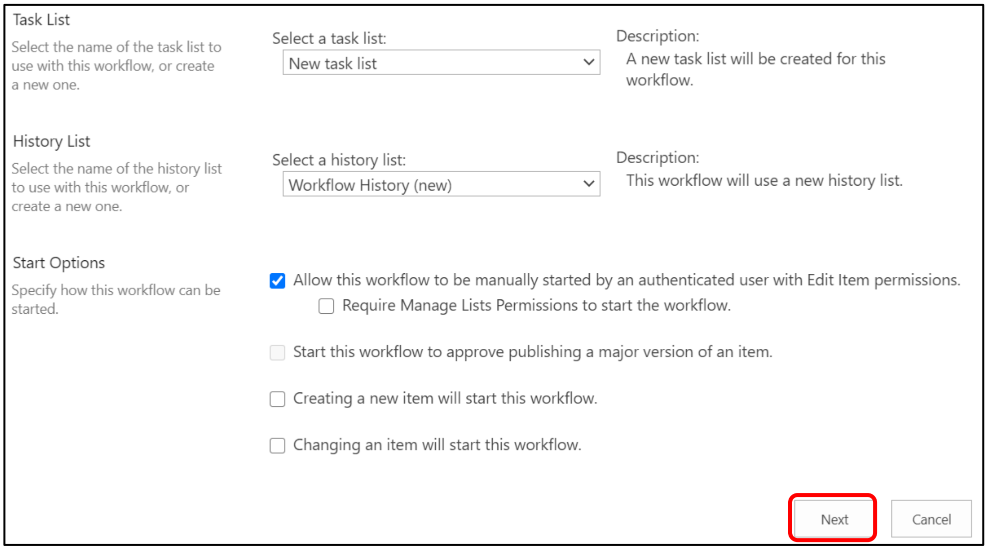


5. Select the **Workflow** template to be used, and enter the **Name** for the new workflow.



6. Select a **Task List** to use for this workflow. The task list stores all tasks associated with the workflow.

7. Select a **History List** in which to display all events that occur during each instance of the workflow.
8. Set your **Start Options,** which specify how, when, or by whom a workflow can be started.



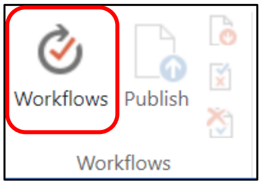
9. Once all the information is entered, click **Next** to continue.
10. Complete the remaining customizable fields:
    - **Workflow Tasks:** Specify how workflow tasks are assigned, if a workflow can be reassigned, and if a participant can request a change be made prior to completing the workflow.
    - **Default Workflow Start Values:** Specify default values of the workflow upon start.
    - **Complete the Workflow:** Specify when the workflow is considered complete, or if the workflow should be cancelled under certain circumstances.
    - **Post-completion Workflow activities:** Upon completion of the workflow, do you want the document status to be automatically updated.
11. Click **OK.**

Start a Workflow

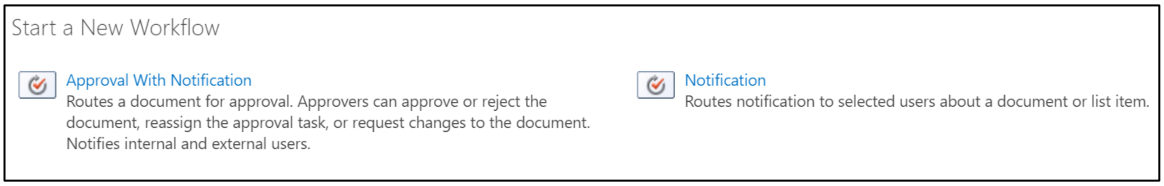
With a workflow available to a list, library or content type, you can start a workflow on an item manually.

1. Open the list or library in which you would like to add a new workflow type.
2. Select the item for which you would like to initiate a workflow.

3. Access the **Files** toolbar ribbon. Click **Workflows.**



4. Select the desired workflow. For example, select the **Approval with Notification** workflow. Note the workflows available depend on how the library is set up.



5. Enter the workflow start criteria. The workflow start criteria depends upon the type of workflow selected:

   - To initiate an **Approval with Notification** workflow you will be prompted to enter the following information:
     - The user ID(s) of approver or reviewer.
     - Select how the tasks will be assigned.
     - Type a message to include in the workflow notification.
     - Designate duration for the process.
     - The user ID(s) of the internal users to notify on the workflow.
     - The email of the external users to notify on the workflow (only applicable to Approval with Notification.

   - To initiate the **Notification** workflow provide the following:
     - The user ID(s) of people to notify.
     - The user ID(s) of individual who should be cc'd on the notification.
     - Type instructions to include in the notification.

   - To initiate a **Review and Approve** workflow provide the following:
     - The user ID(s) of reviewer.
     - The review due date.
     - Indicate if and when a reminder should be sent.
     - The percentage of participation to complete the review step of the process.
     - Whether to require any one reviewer to complete the task. If this option is selected, the percentage of participation option is disabled.
     - The name(s) of approver(s).
     - The approval due date.

- Whether or not, a due date reminder should be sent and if so, how many days prior.
- The percentage of participation to complete the approval step of the process.

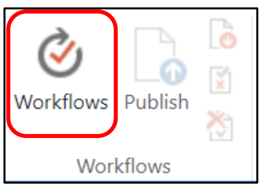
6. Click **Start** to initiate the workflow.

When the workflow is initiated, a task is created for the workflow assignees. In addition, e-mail notifications are sent to assignees and the workflow initiator.

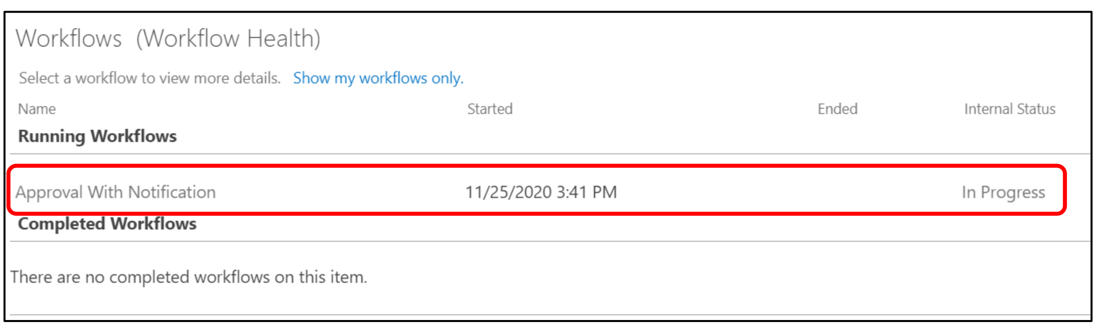
Track and Update a Workflow

You may track the progress of the workflow, and update the workflow participants, instructions, and due dates by accessing the workflow's status page. In addition, all of the details for completed workflows may be accessed review. Details regarding workflows are typically stored in the Workflow History list in the project.

1. Open the list or library.
2. Select the item for which you would like to review the running a workflow.
3. Access the Files toolbar ribbon, and then click **Workflows**.



4. The **Running Workflows** section of the page lists all workflows currently active for this item. The **Complete Workflows** section lists all previous workflows for this item.



5. Select the workflow to review.

Completing a Workflow Task

Once a workflow is created, the required participants are notified by email. Users can access the workflow request from the notification email, or directly from the site.

To complete an assigned workflow, complete the following steps:

1. Click the **Tasks list**.
2. Select the **Title** of the assigned task.
3. The **Workflow Task** page displays where you can access the item to be reviewed as well as type in your comments regarding the item.
4. Once you review the item and typed in any appropriate comments, click on the **Approve** button.

An email is generated and sent to the user who initiated the workflow advising them that the workflow has been completed.

Notification of Workflow Tasks

Workflow Created Notification

When a workflow is initiated, ForumPass sends an email to the initiator of the workflow and to all those who are being tasked (approvers, reviewers, etc.) and those being notified. The email includes a link to the item requiring action and any instructions entered by the initiator.

NOTE: External users are only notified when the workflow has been completed. These users will not receive workflow creation notifications, update notifications or overdue notifications.

Workflow Updated Notification

If a workflow task is updated in any way, an email notification is sent to the affected parties notifying them that a change has taken place.

Workflow Complete Notification

When a workflow task has been completed, an email is sent to all affected parties notifying them that the task is completed and providing a link to workflow history.

Overdue Notification

If a task has not been completed by the due date, ForumPass sends an email to the assignee with a copy to the initiator informing them that their task is overdue and providing them with the workflow instructions found in their original notification.

Reviewer Notification

The reviewer notification email looks different than the rest of the notification emails in format, but contains similar information such as a link to the document location.

Managing Sites and Site Collections

Upon becoming part of the ForumPass community of users, each organization is allocated space on ForumPass servers out of the Exostar Farm. This space contains your **organization site collection**, and is used by Site Creators to build out project site collections for collaboration. (An example of a simple organizational site collection is depicted in the diagram below.)

There are several important things that a Site Creator needs to consider when building the project site:

- In order to add users to your project site, the user must be first be added to the top-level site in an organization. Typically, the user is added at that level as a “Visitor”. Once a member of your organization, the Site Creator can invite the user to the project site and assign appropriate permissions.
- As project sites are created within the organizational site collection, permissions are set to inherit from the parent site, by default. As you build your sites, you will have the option to break that inheritance and create unique permissions.
- And finally, a Newsfeed area is created for each user upon first login.

Sites and Workspaces

ForumPass sites and workspaces are web pages that provide the foundation for collaboration. Sites and workspaces can be used to support project planning activities, document lifecycles, task management, and information sharing. ForumPass sites are dynamic and interactive.
There are five primary categories of Sites within ForumPass, including:

- Team Sites or Collaboration Sites: Collaboration sites are webpart sites and often the primary site and center of a project site collection. Collaboration site templates generally provide document libraries, announcement and task lists, calendars, and a discussion board.
- Community Sites: Enable members of an organization to share information and discuss topics with other members. Includes built in search feature, rating feature, and participation rewards which encourage participation.
- Wiki Sites: Similar to Wikipedia that you find on the Internet, Wiki sites support the sharing and transfer of information and knowledge. Users can create and contribute to Wiki topics, and can create links to other Wiki topics.
- Blog Sites: Allows a user to post ideas, observations, or expertise, then the site becomes a running commentary on the blog’s subject matter.

Apps and Web Parts

A ForumPass Project Site Collection is a group of related web pages which contain content in support of a project. Apps, such as document libraries and lists, are incorporated into the collect in order to store information, share ideas and content, as well as collaborate on other's work.

Project Sites may be comprised of a collection of the following:

- **Document Libraries**: Containers used for file storage and management; and support features such as folders, versioning, checkout, approval capabilities and workflows.
- **Lists**: Containers available to facilitate communication and track information such as announcements, calendar, discussion boards, links, project tasks, issue tracking and surveys.
- **Web Parts**: Components used to build your primary team site by providing visibility and access to featured Apps. For each App that is added to the project site collection, a corresponding web part is created which will be included in the gallery and may be displayed in the Team site.

Site Planning

There are several key things that a Site Administrator or Site Creator must consider when planning a Site Collection. It is critical that user access and permissions, site hierarchy, collection taxonomy, and system limitation all be thoroughly researched and planned.

User Access

One of the most important items for a Project Creator/Owner to understand is that all members of sites must be added to the top-level site in an organization; as well as, the individual site that the user needs to be a member of. It is also recommended to add all members at the top-level site as visitors and then at the lower level sites with appropriate permissions. Permissions may be set by the functionality that will need to be performed.

NOTE: The My Site has limited user access and should not be used for Project Site collaboration.

Site Planning

Prior to building Site Collections, organizations should give careful consideration to the planning that needs to occur to ensure consistency of sites which will allow for easier end-user navigation.

The site **Taxonomy** refers to how you structure and categorize your site content and how users will find information throughout the sites – much like a well-designed blueprint or rules.

There are three types of taxonomies:

- **Flat**: Listing of items, best suited for 30 or fewer objects.
- **Hierarchical**: Represented as a tree architecture; hierarchies are bi-directional, each direction has meaning.
- **Faceted**: Metadata is one type of facet in a faceted taxonomy.

Organizations should define simple policies that can be easily followed and that will support the long-term sustainability and usability of the taxonomy and content.

It is important to recognize that users will think about and look for information in different ways. Some important items to consider when defining your taxonomy are:

- How to best structure your site and site components, such as sub sites, lists and libraries
- How to best organize your data
- Incorporate standard business practices, categorizations and nomenclatures

Taxonomy Best Practices

When designing taxonomy, organizations should keep in mind the following elements:

- Users want options, not complexity
- Quality of metadata affects the quality of the taxonomy
- Scalability: quality must increase as the taxonomy scales
- Consistency: achieved better programmatically than by human intervention
- Persistency: must be able to persist over time

Scale Considerations

The following are system limitations to be aware of and consider when planning your site and defining your taxonomy:

Supported Limits		
250,000	**Sites**	Number of sites per Site Collection per Farm
2,000	**Nested Sub Sites**	Number of sub sites nested under a site
30,000,000	**Items/ Documents**	Number of items per list or library
5,000	**List Views**	Number of list or library items that a database operation can process at a time
500 MB	**File Size**	Maximum threshold for document file size
250 MB	**Encrypted Document**	Maximum file size for encrypted documents

For a complete overview of limits and boundaries visit: http://technet.microsoft.com/en-us/library/cc262787.aspx#Overview.

Site Creation

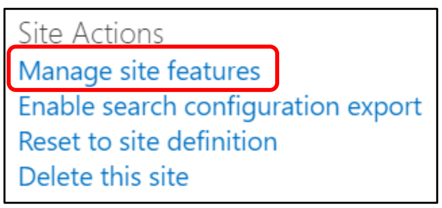
Once you complete all necessary planning, you are ready to create a ForumPass site. Prior to creating a site, you must first understand your Organizational Site Collection structure, and where this project site is best suited within the collection.

Workspace Provisioning Form

Site Owners and Site Collection Administrators can configure their Site Collection with the Workspace Provisioning Form, which provides a *New Site* option directly from the **Settings** menu. The form is configurable to include customization options for site creation.

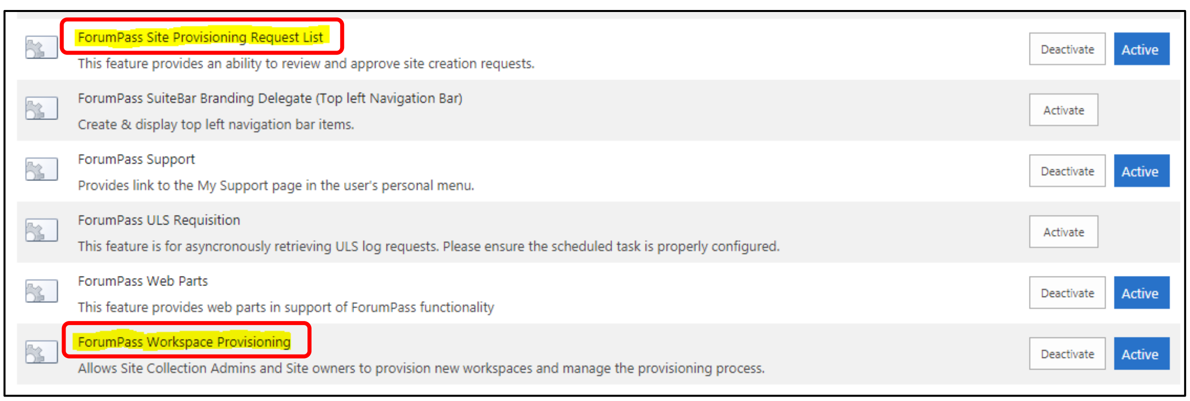
To enable the configurable form:

1. From the **Settings** menu, select **Site Settings**.
2. Under the **Site Actions** section, select **Manage site features**.



3. Active **ForumPass Workspace Provisioning** and **ForumPass Site Provisioning Request List** automatically activates.

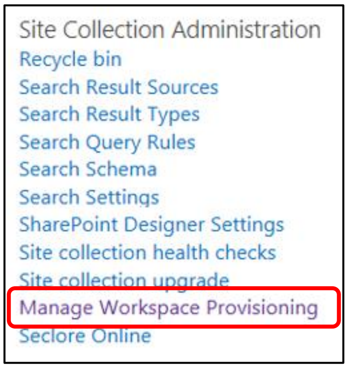
NOTE: Double-check both functions are activated before proceeding.



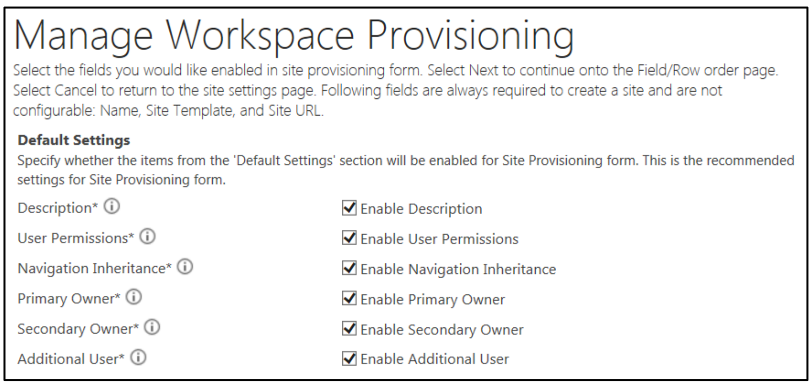
To configure the form:

1. From the **Settings** menu (gear icon), select **Site Settings**.

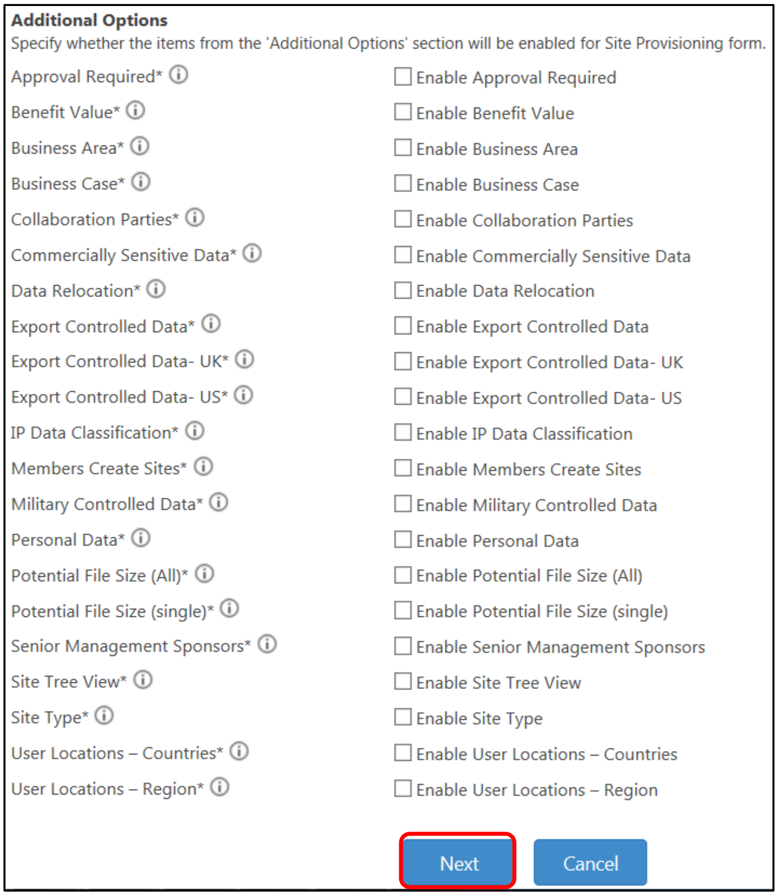
2. Under the **Site Collection Administration** section, select **Manage Workspace Provisioning**.



3. On the **Manage Workspace Provisioning** page, place a **checkmark** next to all desired selections and deselect any unwanted selections. Click **Next**.



NOTE: The **Default** section has all options selected automatically. The **Additional Options** section provides the following:



Additional Options

Specify whether the items from the 'Additional Options' section will be enabled for Site Provisioning form.

Approval Required*	☐ Enable Approval Required
Benefit Value*	☐ Enable Benefit Value
Business Area*	☐ Enable Business Area
Business Case*	☐ Enable Business Case
Collaboration Parties*	☐ Enable Collaboration Parties
Commercially Sensitive Data*	☐ Enable Commercially Sensitive Data
Data Relocation*	☐ Enable Data Relocation
Export Controlled Data*	☐ Enable Export Controlled Data
Export Controlled Data- UK*	☐ Enable Export Controlled Data- UK
Export Controlled Data- US*	☐ Enable Export Controlled Data- US
IP Data Classification*	☐ Enable IP Data Classification
Members Create Sites*	☐ Enable Members Create Sites
Military Controlled Data*	☐ Enable Military Controlled Data
Personal Data*	☐ Enable Personal Data
Potential File Size (All)*	☐ Enable Potential File Size (All)
Potential File Size (single)*	☐ Enable Potential File Size (single)
Senior Management Sponsors*	☐ Enable Senior Management Sponsors
Site Tree View*	☐ Enable Site Tree View
Site Type*	☐ Enable Site Type
User Locations – Countries*	☐ Enable User Locations – Countries
User Locations – Region*	☐ Enable User Locations – Region

Next Cancel

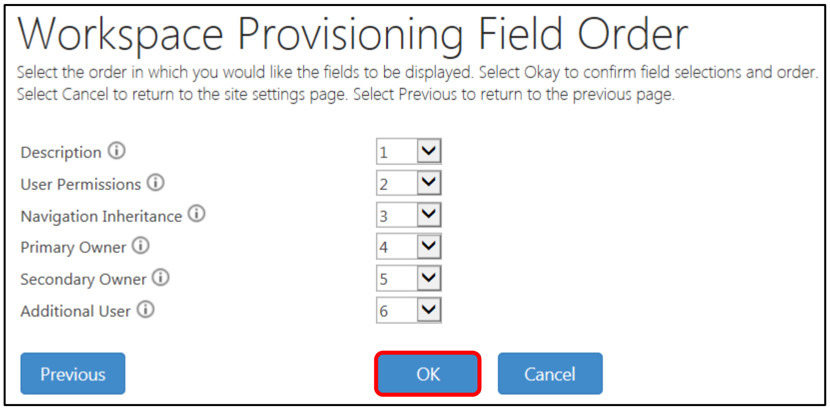
Notes on Approval Required:

- If you select **Approval Required**, a **Site Approvers Group** is created to approve new site requests.
- The SCA is automatically a part of that group and can add additional users.
- Site Approvers have permission to edit **Site Provisioning Information List**.
    - This list stores information provided on the form. When approval is required, Site Approvers go to the list to approve the site.
- Emails are sent out to the person who requests site creation, the primary/secondary owners, and the members of the Site Approvers Group.
- When **Members Create Site** is enabled, Approval Required is automatically enabled.

Notes on Business Area:

- When Business Area is enabled, a business area list is created.
- Business Area list stores the Site Collection URLs and their corresponding titles.

4. On the **Workspace Provisioning Field Order** page, select in which order you want the options to display on the form. Click **OK** to create your form.

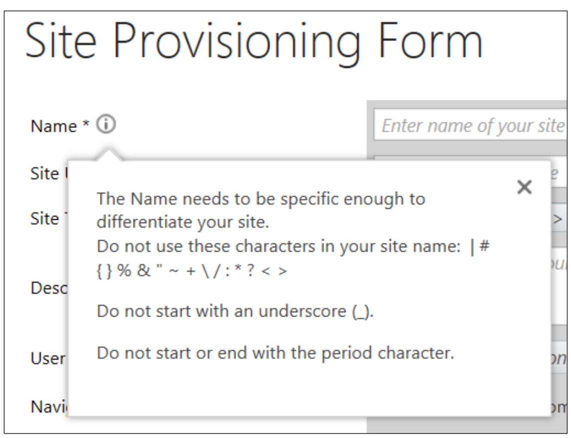


Using the Quick Start Template

There are several site templates to choose from when creating your project site. The steps below use the Quick Start Custom template, and use a provisioning form with just the default options selected. Each field has an information icon with tips on the information you enter.

To create a new subsite:

1. In the upper left corner of the page, access the **Settings** menu (gear icon).
2. Select **Create New Site.**
3. The **Site Provisioning Form** displays**.** Enter a **Name** for the site.



4. Enter your **Site URL**.

NOTE: You do not need to enter the first part of the web address (http://).

5. Select a **Template**.
6. Enter a **Description** for the site. The description should define the purpose of your site.
7. Select **User Permissions**. If you choose **Parent Site Permissions**, the subsite inherits the parent site's permissions. If you choose **Unique Site Permissions**, three user groups are automatically created for you to manage.

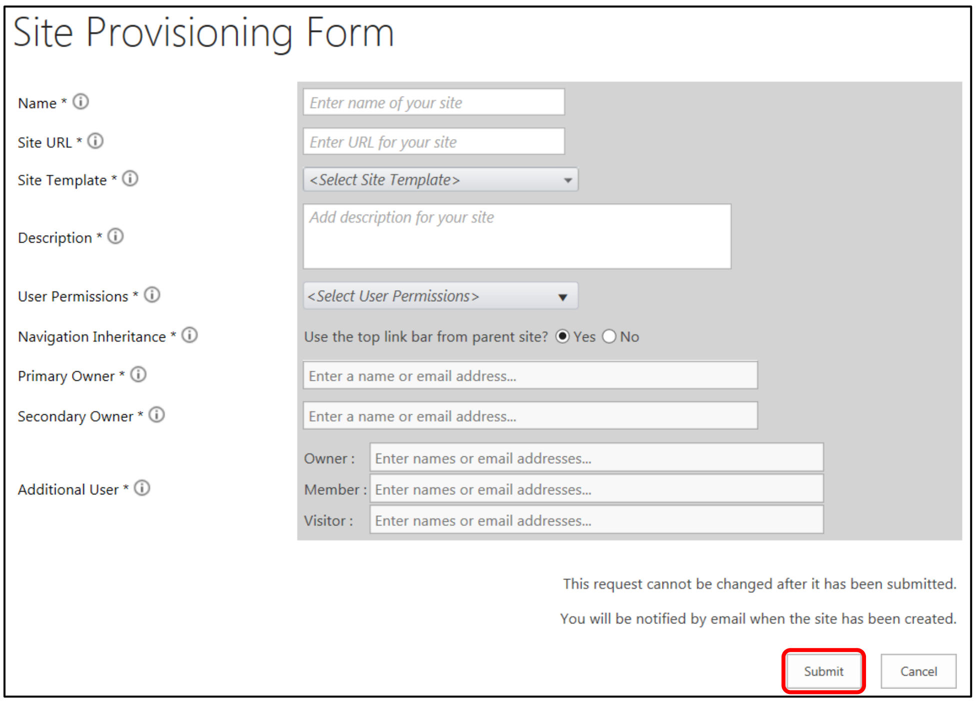
NOTE: If you choose to inherit the parent site permissions, the **Primary Owner**, **Secondary**

Owner, and **Additional Users** fields disappear from the form.

8. In the **Navigation Inheritance** section, specify whether you want the site to display the same top link bar as the parent.

NOTE: This setting also affects the navigation link to the parent site within the Navigation Folder path. If you click **No**, your subsite will not contain the link to the parent site.

9. With all settings designated, Click **Submit** to create your site**.**



Site Settings

Once you create a site, there are a number of site settings associated with the site which can be viewed and modified to suit the needs of your project.

To access the site settings:

1. Select the **Settings** dropdown.
2. Select **Site Settings.**

The settings available to you depend on the permissions you are assigned. The majority of users managing sites are site owners (i.e. users that have full control permission over the site) and have access to the following settings:

Users and Permissions
People and groups
Site permissions
Access requests and invitations
Site collection administrators
Site app permissions
Invite users by email
Outstanding invitations
Remove user from site collection
View user permissions

Web Designer Galleries
Site columns
Site content types
Web parts
List templates
Master pages and page layouts
Themes
Solutions
Composed looks

Site Administration
Regional settings
Site libraries and lists
User alerts
RSS
Sites and workspaces
Workflow settings
Site output cache
Term store management
Popularity Trends
Content and structure
Manage catalog connections
Content and structure logs
Site variation settings
Translation Status

Search
Result Sources
Result Types
Query Rules
Schema
Search Settings
Searchable columns
Search and offline availability
Configuration Import
Configuration Export

Look and Feel
Design Manager
Master page
Title, description, and logo
Page layouts and site templates
Welcome Page
Device Channels
Tree view
Change the look
Import Design Package
Navigation
Image Renditions

Site Actions
Manage site features
Reset to site definition
Delete this site

Site Collection Administration
Recycle bin
Search Result Sources
Search Result Types
Search Query Rules
Search Schema
Search Settings
Search Configuration Import
Search Configuration Export
Site collection features
Site hierarchy
Site collection navigation
Search engine optimization settings
Site collection audit settings
Audit log reports
Portal site connection
Content Type Policy Templates
Storage Metrics
Site collection app permissions
Site collection cache profiles
Site collection object cache
Content type publishing
Site collection output cache
Popularity and Search Reports
Variations Settings
Variation labels
Variation logs
Translatable columns
Suggested Content Browser Locations
Help settings
HTML Field Security
SharePoint Designer Settings
Site collection health checks
Site collection upgrade
Manage Workspace Provisioning
Seclore Online

Users and Permissions Settings

Setting Category	Setting	Description
Users and Permissions	People and Groups	View, edit, and create permission groups. Groups are a collection of uses who all have the same permissions. Groups simplify the task of assigning and managing access.
	Site Permissions	Define the capabilities that each user or group can perform on this site and all subsites inheriting permissions.
	Site app permissions	Manage app access to content in the site.
	Invite by Email	Invite users from outside your organization by their email address.
	Outstanding invitations	View pending invitations to this site.
	View user permissions	Show permissions for user who can access this site.
	Check User access	Show all items that a user can access.
	Check visitor access	Check visitor access.

An effective permission strategy enhances the manageability of your site, ensure compliance with your organization's data governance policies, and help control the maintenance for you and your organizations.

When planning your site permission strategy consider the following tips:

Permission groups:

- Use groups to manage your users
- Most users should be added to the Members or Visitors group which provides contribute rights. Members have contribute rights, and Visitors have read only right
- Limit the number of user in the Owners group

Permission inheritance:

- Content areas are set to inherit permissions from parent
- Using inheritance allows for a clean, easy-to-visualize hierarchy
- Minimize the use of unique permission

The Users and Permission site settings section allows you to manage permissions on your site.

Inviting Users to Your Site

The Users and Permissions section of the site settings also provides you two options with which to invite people to your project site.

People and Groups: You may invite users through the **People and Groups** link, by clicking **New → Add Users**. The email that is generated using this functionality appears below. This email provides a link to join the project site and also includes basic information on 'What is a SharePoint site'.

Invite users by Email: You may also use the **Invite by Email** option to add participants to your project site. You may utilize this functionality prior to a person being a member of ForumPass. The email generated with the Invite by Email option includes more specific information; including:

- Name of the person inviting the user.
- Name of the site with a hyperlink to the site.
- User permissions for that site.
- Additional text explaining where the site is listed as well as what to do if they are not able to access the site.
- Site Description.
- Site Owner Organization.
- Site Permissions.
- Additional comments sent from the site owner.

If the person is not yet a member, their invitation is stored in **Outstanding Invitations** and is sent once their User ID is linked to ForumPass.

From **Settings → Site Settings,** select the **Outstanding Invitations** link. From here, you can **Delete** a pending invitation; if perhaps the name/email address was entered incorrectly or if the invitation to join the project is no longer valid.

Look and Feel Settings

The Look and Feel section of the Site Settings allows you to modify site attributes and navigational options, change the color schemes, and save the site as a template.

Setting Category	Setting	Description
Look and Feel	Design Manager	Create and modify page templates and more
	Title, Description and logo	Configure the tile, description and logo displayed on this site

	Device Channels	Create and organize device channels to optimize the way your site is rendered to mobile and alternate devices
	Tree View	Show or hide the quick launch and hierarchical tree view of sties, lists, and folders
	Change the look	Select a style which defines the fonts and colors for this site
	Import Design Package	Import a Design Package or Design Files
	Navigation	Manage the links on the quick launch (within a site) and global navigation (across sites)

Title, Description, and Icon

These settings allow you to define descriptors for your site.

- **Title and Description** fields allow you to update the title and description of the site
- **The Logo URL and Descriptions** section allows you to personalize your site with your company logo which will appear in the upper left of the site.
  - You must first add the image to a site list in order to establish a URL for the image in ForumPass.
  - Then, paste the location URL to map to that image. You can also add a hint text description for the image.
- Lastly, you can update the **Web Site Address** for the site.

Navigation

The Navigation Settings allow you to specify the items that you want to display in the navigation link bars of the site.

- **Global Navigation** specifies if this site will display the same tabbed navigation as the parent site.
- **Current Navigation** provides inheritance options regarding the Quick Launch menu. Your site may display the same navigation as the parent site, sibling sites, or neither.
  - **Sub sites and Pages** will show in the navigation area. All newly create sub sites will be added, and you can hide individual sites as desired.
- **Sorting** allows you to define how the Quick Launch menu items will be sorted.
- The last setting on this page, **Navigation Editing and Sorting**, allows you to modify and reorder the navigation items displayed in the Quick Launch Menu.
  - You can change the order of items on the Quick Launch, as well as add, edit or delete a Quick Launch heading.
  - You can also add, move or delete a Quick Launch link.

Tip: Depending on who is accessing your site, the Site Administrator may want to remove the

People and Groups heading from the Quick Launch Area and manage users from the Site Actions Menu.

Tree View

The Tree View settings option allows you to **Enable Quick Launch** and to **Enable Tree View**.

- **Enable Quick Launch** allows you to specify if a Quick Launch Area is to be displayed.

  NOTE: If you choose to deselect **Enable Quick Launch**, the content of the Quick Launch Area will no longer be visible; however, the **View all Site Content** and the **Recycle Bin** links will still be displayed.

- **Enable Tree View** allows you to specify whether a Tree View should be displayed in the Quick Launch Area. The Tree View displays the site content in a folder structure, or physical manner.

Please note for Tree View to work properly, your site should not inherit navigation from the parent site.

Change the Look

The Change the look setting allows you to change the fonts and color scheme for your site. Applying a theme does not affect your site's layout and will not change any pages that have been individually themed.

You may click through the different theme options to Preview the selectio*n.*

NOTE: If you would like to incorporate specific branding look and feel, please contact your Site Collection Administrator. Your company will need to contact Exostar to coordinate with Professional Services in order to implement custom site themes for your site collection.

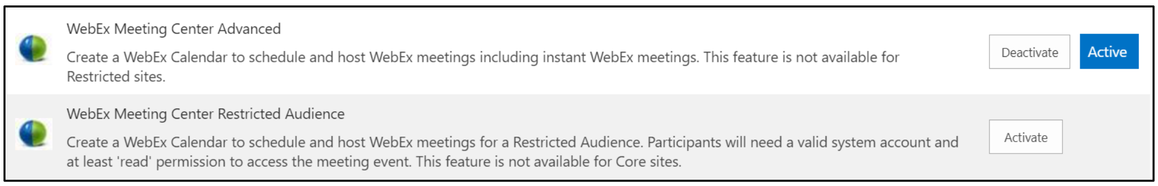
Site Actions Settings

Setting Category	Setting	Description
Site Actions	Manage site features	Activate or deactivate features that provide additional Web Parts, pages, and other functionality to your site.
	Save site as template	Save this site as a template which can be reused when creating other sites.
	Enable Search configuration export	Activate features to enable export of search settings.
	Reset to site definition	Remove all customizations from a single page or all pages in this site.
	Delete this site	Permanently remove this site and all contained content.

Manage Site Features

The Site Features page allows you to activate or deactivate several features within the project site. Many of these features are activated by default when the site is created using the Quick Start Template. Site features do not propagate to sub sites; therefore, each sub site created will require activation of these features, if required.

One commonly accessed feature is the **WebEx Meeting** options. A **WebEx Meeting Center** feature must be activated in order to integrate the WebEx functionality into your site collection. There are two available WebEx features.



WebEx Meeting Center Advanced feature: Enables WebEx within the project site collection and creates one custom list in the site: *Advanced WebEx Calendar* list. This list provides the ability for users to create and manage team events and WebEx meetings, and host instant meetings. *Note: Activating this feature may add the Host Instant Meeting option to the toolbar of existing WebEx meeting lists.*

WebEx Meeting Center Restricted Audience feature: Enables WebEx in a sensitive, restricted or protected project site collection and creates one custom list in the site: *Restricted Audience WebEx Calendar* list. This feature can only be enabled in Sensitive, Restricted and Protected project sites, and all meeting content transmission will be encrypted. In addition, meetings managed within the Restricted Audience WebEx Calendar list require all participants be authenticated in ForumPass in order to host or participate in the events.

Reset to Site Definition

Reset to Site Definition allows you to remove all customization from a page. You can choose to reset a single page within your site, or you can reset all of the pages.

Caution: When you reset to the site definition version, you will lose all customizations. No backup copy of the page will be made available.

Delete this Site

Delete this site allows you to simply delete the site and all of the content within the site.

Caution: When you elect to delete the site, no archive of the site or content is retained and the site/content will no longer be available.

Site Administration Settings

Setting Category	Setting	Description
Site Administration	Regional Settings	Configure regional settings such as locale, time zone, calendar format, and work week.
	Lists and Libraries	View and customize the lists and libraries in this site
	User Alerts	Manage alert settings
	RSS	Enable or disable syndication feeds
	Sites and Workspaces	Review and create subsites and workspaces
	Workflow settings	Manage the workflows that are associated with this site
	Term store management	Manage taxonomy metadata and keyword used by this site
	Popularity Trends	Review popularity trends reports, which provide insight into how and what content is being accessed
	Content and Structure	Use the content and structure application to rearrange the physical layout of all your sites, lists, and libraries
	Content and Structure logs	Review the long running operation logs, which provide a history of operations and recovery information for operations in error
	Translation status	Review variation logs, which provided tracking and history for the variations publishing process

Regional Settings

Regional Settings are the "**Time Zone Settings**" for your site. Since our site was created using the Quick Start Template, the regional settings associated with it reflect those that were set in the template.

However, the regional settings on your site may need to be different than those defined by the Quick Start Template. In these situations, modify the regional settings to better suit the need of your users.

- **Time Zone:** Specify the standard time zone.
- **Locale:** Select a locale (language) from the list to specify the language the site displays numbers, dates, and time.
- **Sort Order:** Specify the sort order.

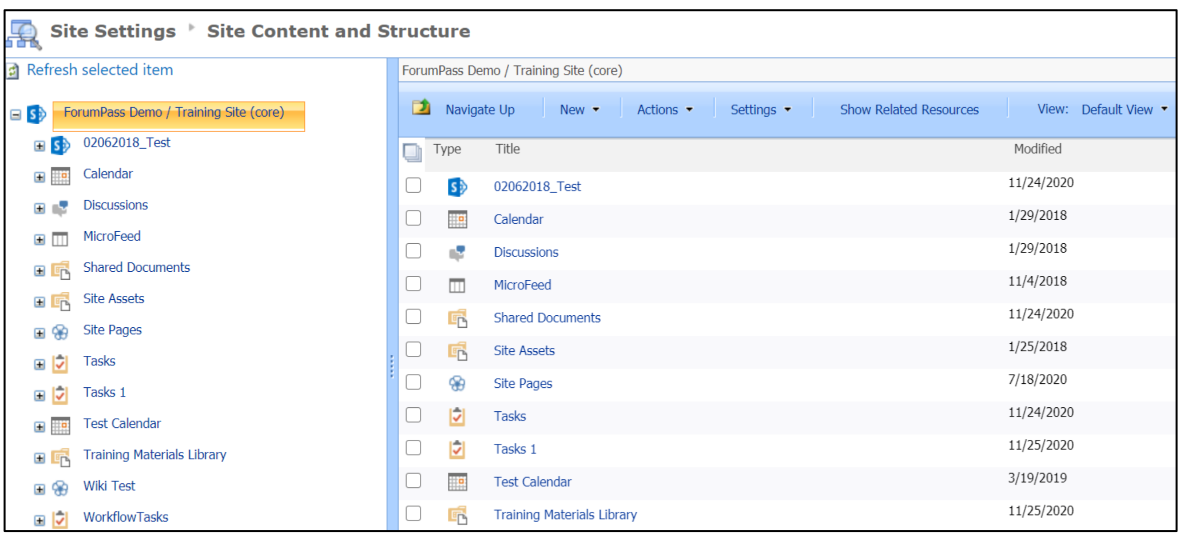
- **Set Your Calendar:** Specify the type of calendar.
- **Enable an Alternate Calendar:** Specify a secondary calendar that provides extra information on the calendar features.
- **Define Your Work Week:** Select which days comprise your work week and select the first day of each work week.
- **Time Format:** Specify whether you want to use 12-hour time format or 24-hour format.

To adjust any of the items simply click on the drop down arrow and the various options for each category will be displayed. After you have changed all the applicable settings, click **OK**.

Content and Structure

The **Content and Structure** page allows you to see, in Tree View, the complete hierarchy of your site collection and also allows you to navigate between sites and site content.

Content and Structure also allows you to perform actions on multiple items simultaneously. For example, if you would like to move, or delete several items within a document library, you access that content, select multiple items, and use the Actions menu to perform the action.



Site Libraries and Lists Settings

The **Site Libraries and Lists** settings provide access to all of the site's libraries and lists. From here you can create a new library or list, or you can customize the libraries and lists that are currently in your site.

Libraries and Lists can be customized in many ways including:

- You can control how documents or items are viewed, tracked, managed and created.

- You can track versions, including how many and which type of versions.
- You can limit who can see documents or items before they are approved.
- You can choose to include workflows to collaborate on documents in libraries as well as content of lists.

The Quick Start Template used to create a site includes document libraries, communication lists, tracking lists, and a custom list. Of course, each one of these content containers has settings associated with them.

NOTE: You can also access many of the library and list settings from within the library by using the **Library Tools** → **Library** ribbon.

Site Apps Settings

Each app within a project site has settings that can be reviewed and modified to suit the needs of the project.

For information on Apps and App Settings refer to the section on Apps above.

WebEx Meetings and Meeting Workspaces

The ForumPass integrated webinar functionality supports web conferencing through WebEx's meeting center. Organizations who subscribe to the WebEx feature, can take full advantage of WebEx by integrating WebEx colanders into project site collections, and hosting and attending WebEx meetings.

Enabling the WebEx Service

In order to take advantage of the WebEx features, Organizations must first subscribe for and enable the WebEx Meeting Center Service in MAG.

Once an organization has subscribed for the service, all users within that organization will automatically have access to WebEx.

Incorporating WebEx into a Project Collection

A WebEx meeting calendar app may be incorporated into project sites by the site administrator. The WebEx meeting calendar supports the integrated WebEx functionality needed to take advantage of using WebEx's meetings within a project.

Working within a project site, Site Administrators have two options of WebEx features and can choose to enable one or both of them within the project site collection:

WebEx Meeting Center Advanced: Enables WebEx within the project site collection and creates one custom list in the site: *Advanced WebEx Calendar* list. This list provides the ability for users to create and manage team events and WebEx meetings, and host instant meetings. The

- Advanced WebEx Calendar list: Provides the capabilities to schedule and manage team events, WebEx meetings, and host instant meetings on one calendar.

WebEx Meeting Center Restricted Audience: Enables WebEx in a sensitive, restricted or protected project site collection and creates one custom list in the site: Restricted Audience WebEx Calendar list. This feature can only be enabled in Sensitive, Restricted and Protected project sites and all meeting content will be encrypted.

- The Restricted Audience WebEx Calendar list: Provides the capabilities to schedule and manage meetings that require both the host and the participants be authenticated in ForumPass. Participants will need a valid ForumPass account and at least "Read" permission to access the meeting event. All meetings hosted within this calendar list type will transmit encrypted data. Note: Instant WebEx meetings are not available within this meeting list.

Enabling the WebEx Feature

To activate the WebEx feature within a project site:

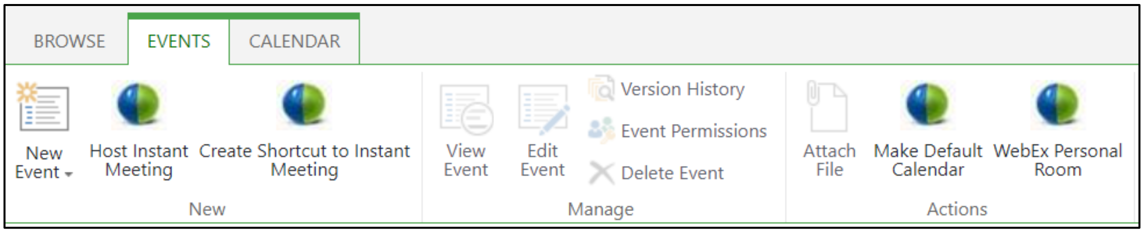
1. Access the site in which the WebEx feature is to be activated.
2. Select **Settings → Site Settings** menu item. The Site Settings page displays.
3. Within the Site Settings page, locate the **Site Actions** column and select **Manage site features.**
4. On the Site Features page, locate the WebEx Meeting Center options. Click **Active** for the **WebEx Meeting Center Advanced**.
5. The WebEx calendar is now available from the site's Quick Launch Area.

NOTE: The site features do not propagate to subsites; hence for each subsite created you must activate a WebEx Meeting Center for it to be available within that site.

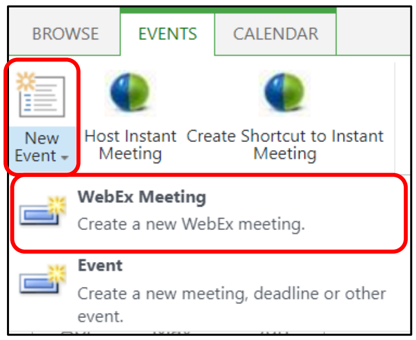
Schedule a WebEx Meeting

As mentioned above, custom calendar lists are created within a site upon activation of the WebEx feature. These site calendar lists are used to schedule, join, manage, and host meetings.

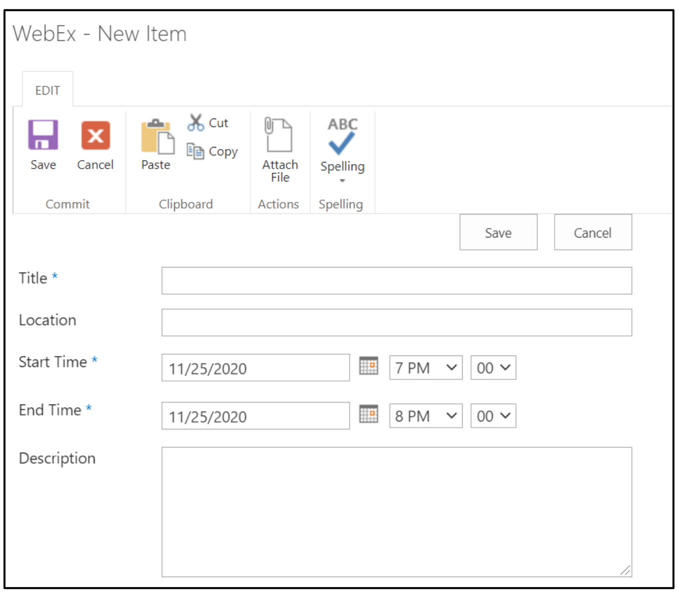
With WebEx enabled within a site collection, you are able to create and manage web based meetings using the WebEx calendar list.



1. Select the WebEx meeting calendar list in the Quick Launch area.
2. In the Events toolbar ribbon, click **New Event → WebEx Meeting.**



3. Complete the required fields, including: Title, Start Time, and End Time.

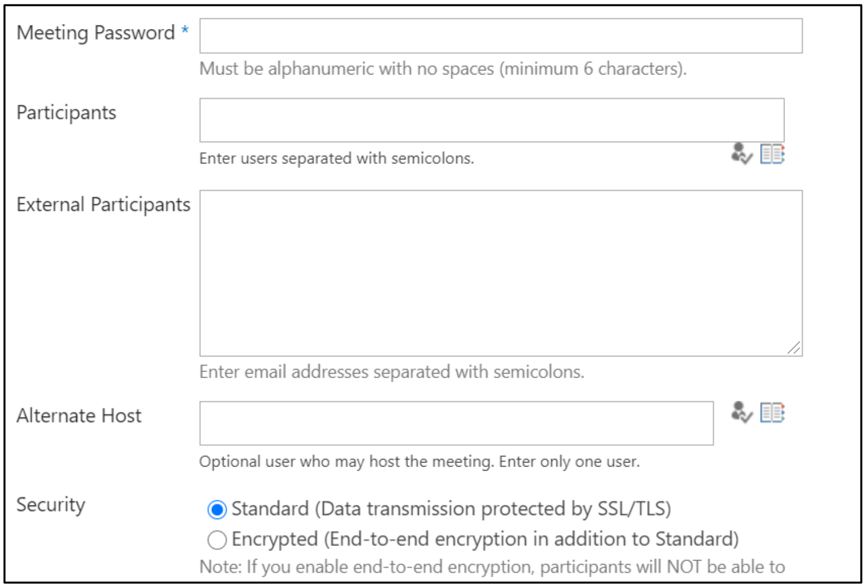


4. **Add Participants:** In the Participants section, click the **Address Book** icon. Type the participants name or group name in the Find field and then hit Enter. Select the participant's name and click **Add**, then click **OK**.

NOTE: You can also invite users by email address in the External Participants section. External participants cannot be added to Restricted Audience meetings.

5. You may select to identify an Alternate Host, which is an optional user who may host the meeting.

NOTE: Your Alternate Host must be a member of ForumPass with a minimum of Contribute permission level in the project site.



6. Select either **Standard** or **End-to-End Encryption** for your data transmission.
    - Standard data transmissions supports 128-bit Secure Sockets Layer (SSL) protected meetings.
    - Encrypted: All web conferencing content is encrypted using AES-256 throughout its transversal of the network and across all public Internet links.

Notes about Encrypted meeting transmission:

- Because the host generates the private key when the meeting is hosted, the ‘join before host’ functionality for E2E Encrypted meetings cannot be provided.
- Because the ‘join before host’ functionality is not necessary for Instant Meetings, these meetings will be end to end encrypted by default.
- Meetings conducted in the Restricted Audience calendar will always transmit encrypted data; therefore this option is not available.

7. Click **OK** to complete the creation of this meeting.

The system automatically generates a meeting number for a WebEx meeting once it is created, and sends an email with all the meeting details to the participants, as well as the host, and if applicable the alternate host.

NOTE: Because ForumPass automatically generates a meeting number immediately for the WebEx meeting, the meeting number can be published in advance of the meeting.

Meeting Notification

The meeting invitation email that is sent to all meeting participants includes:

- Status
- Date
- Starting Time
- Duration
- Meeting Number
- Meeting Password
- Teleconference
- Host
- Host's Email Address

From the email that is sent to a WebEx meeting invitee, the user is able to:

- Join Meeting
- View the meeting agenda (if applicable)
- Add the meeting to their Microsoft Outlook calendar

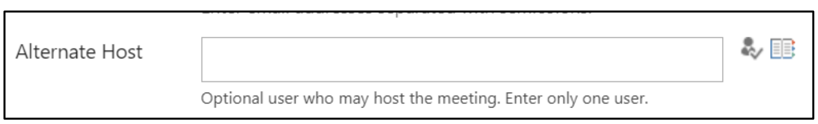
As the host of the WebEx meeting you receive a Host Email with all the meeting details.

Password Restrictions

Meeting Passwords must contain at least six (6) alphanumeric characters. In addition, the following are not permitted to be used as the meeting password: “password”, “passwd”, and “pass”.

Alternate Host Capability for WebEx Meetings

A WebEx Meeting event in ForumPass includes the option to specify an Alternate Host for the event. The Alternate Host has the ability to host the event just like the creator of the event.



The creator of the WebEx meeting is able to select an Alternate Host using the address book icon. The Alternate Host needs to have at least Read permissions within the project site to be able to host the meeting.

While the meeting creator has the ability to edit or delete the event, the Alternate Host does NOT have these capabilities.

The Alternate Host receives an email containing all meeting details and host information.

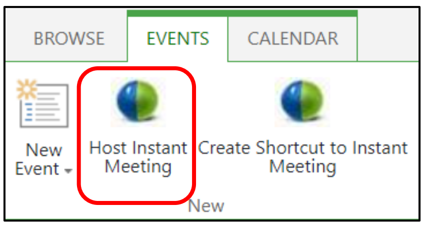
Instant Meeting

The option to host an instant meeting is available within WebEx Meeting lists. When hosting an instant meeting, ForumPass automatically assigns a meeting number and starts the WebEx meeting in a separate browser window. No user invitations will be required for instant WebEx meetings.

1. Select a **WebEx Meetings list** in the Quick Launch Area.

NOTE: WebEx Instant Meetings are NOT available within a Restricted Audience WebEx Calendar.

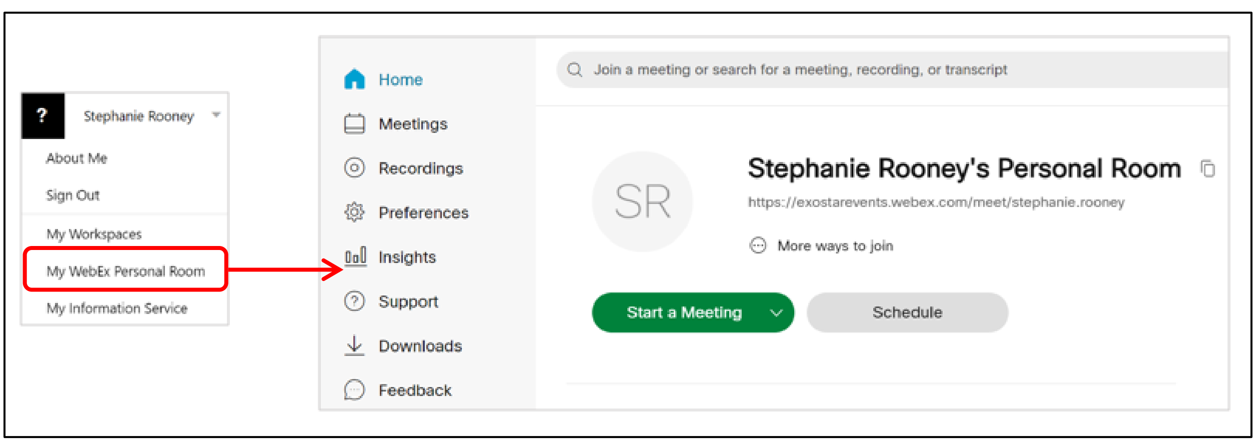
2. Access the Custom Commands toolbar option. Select **Host Instant Meeting.**



3. The WebEx Meeting Manager application is launched in the browser. A new meeting is started in WebEx.

My WebEx Personal Room

Each user has a *WebEx Personal Room* which provides access to all of your scheduled WebEx meetings and provides the ability to join meetings and launch an instant meeting. You can access your WebEx Personal Room from the User dropdown menu at the top right of all ForumPass pages. Your ForumPass credentials are passed to WebEx, and you will be able to join and schedule meeting.



Attend a Meeting: enter meeting number and join a meeting in progress.

Host a Meeting

- **My Personal Room***:* Click Enter Room to launch and host an instant meeting. From there you may invite participants and share content.
- **Schedule a Meeting:** Add a meeting to your calendar. Invitees will be notified via email.
- **My Meetings:** Provides access to all of your scheduled meetings.
- **My Recorded Meetings***:* Provides access to meetings that you've recorded.

WebEx Meeting Tips

The following are tips and best practices for a successful meeting:

- Prior to your meeting, ensure your computer and network are working properly to avoid any unexpected delays or problems during your meeting.
- Place all presentation files in a single folder, so you can quickly retrieve them for sharing during your meeting.
- Practice sharing your presentation materials in advance of your participant's arrival.
- Once your meeting has begun, take note of the meeting number and host key (located on the Info tab in the WebEx). These numbers will help you reclaim the host privileges if necessary.
- If your scheduled meeting details change, update the meeting within the meeting list in ForumPass rather than create a new meeting. This helps avoid confusion for your participants.
- For security purposes, it is best practice to always apply a password to your meeting.

Appendix A – Blocked File Types

The following file types are blocked for upload into ForumPass:

ade	ins	msi
adp	isp	msp
app	its	mst
asa	jse	ops
ashx	ksh	pcd
asmx	lnk	pif
asp	mad	prf
bas	maf	prg
bat	mag	printer
cdx	mam	pst
cer	maq	reg
chm	mar	rem
class	mas	scf
cmd	mat	scr
com	mau	sct
config	mav	shb
cpl	maw	shs
crt	mda	shtm
csh	mdt	shtml
der	mdz	soap
dll	msc	stm
exe	msh	vb
fxp	msh1	vbe
gadget	msh1xml	vbs
hlp	msh2	ws
hta	msh2xml	wsc
htr	mshxml	wsf
htw		wsh
ida		
idc		
idq		

Appendix B – Web Part Templates

ForumPass allows a user to create and customize a Web Part using the following templates:

Category	Web Part Templates	Description
Business Data	Business Data Actions	Display a list of actions from the Business Data Catalog.
	Business Data Item	Display one item from a data source in the Business Data Catalog.
	Business Data Item Builder	Creates a Business Data item from parameters in the query string and provides it to other Web Parts. This Web Part is only used on Business Data profile pages.
	Business Data List	Display a list of items from a data source in the Business Data Catalog.
	Business Data Related List	Display a list of items related to one or more parent items from a data source in the Business Data Catalog.
	iView Web Part	Displays iViews from SAP portal servers.
	WSRP Consumer Web Part	Displays portlets from web sites using WSRP 1.1
Content Rollup	Colleague Tracker	Displays a list of your colleagues and their recent changes.
	Colleagues	Shows the link to colleagues the user has shared with you.
	Get Started with My Site	Links to various hints and tips about the usage of My Site.
	In Common Between Us	Shows what is in common between you and the user.
	Memberships	Displays your site and distribution list membership.
	My Links	Use to display your links.
	My Pictures	Displays pictures from your picture library, with an option to view as a slide show.
	My SharePoint Sites	Use to display documents authored by you on sites where you are a member and sites of your choice.
	My Workspaces	Displays sites created under your My Site.
	Recent Blog Posts	The most recent blog posts for the user.
	SharePoint Documents	Use to display documents authored by the user where the user is a site member.
	Site Aggregator	Use to display sites of your choice.
Dashboard	Key Performance Indicators	Shows a list of status indicators. Status indicators display important measures for your organization and show how your organization is performing with respect to your goals.
	KPI Details	Displays the details of a single status indicator. Status indicators display an important measure for an organization and may be obtained from other data sources including SharePoint lists, Excel workbooks, and SQL Server 2005 Analysis Services KPIs.
Default	I need to….	Displays tasks and tools from a list.

	This Week in Pictures	Displays one image from an Image Library and links to a slide show where users can see all of the images in the Image Library.
Filters	Business Data Catalog Filter	Filter the contents of Web Parts using a list of values from the Business Data Catalog.
	Choice Filter	Filter the contents of web parts using a list of values entered by the page author.
	Current User Filter	Filter the contents of Web Parts by using properties of the current page
	Date Filter	Filter the contents of Web Parts by allowing users to enter or pick a date.
	Filter Actions	Filter action.
	Page Field Filter	Filter the contents of Web Parts using information about the current page.
	Query String (URL) Filter	Filter the contents of Web Parts using values passed via the query string.
	SharePoint List Filter	Filter the contents of web parts by using a list of values from a Office SharePoint Server list.
	SQL Server 2005 Analysis Services Filter	Filter the contents of Web Parts using a list of values from SQL Server 2005 Analysis Services cubes.
	Text Filter	Filter the contents of Web Parts by allowing users to enter a text value.
Miscellaneous	Contact Details	Use to display details about a contact for this page or site.
	Content Editor Web Part	Use for formatted text, tables, and images.
	Form Web Part	Use to connect simple form controls to other Web Parts.
	Image Web Part	Use to display pictures and photos.
	Page View Web Part	Use to display linked content, such as files, folders, or web pages. The link content is isolated from other content on the Web Part page.
	Relevant Documents	Use this Web Part to display documents that are relevant to the current user.
	Site Users	Use the Site Users Web Part to see a list of the site users and their online status.
	Tree View Web Part	Use this Web Part to display document library in a tree view.
	User Tasks	Use this Web Part to display task that are assigned to the current user.
	XML Web Part	Used for XML, and XSL TRANSFORMATION of the XML.
Search	Advanced Search Box	Used for parameterized searches based on properties and combinations of words.
	Federated Results	This Web Part displays the Federated results from the configured location.

	People Search Box	Used to search people.
	People Search Core Results	This Web Part displays the people search results and the properties associated with them.
	Search Action Links	Web Part to display the search action links.
	Search Best Bets	Web Part to display the special term and high confidence results.
	Search Box	Used to search document and items.
	Search Core Results	The Web Part displays the search results and the properties associated with them.
	Search High Confidence Results	Displays keywords, best bets and high confidence results.
	Search Paging	Displays links for navigating pages containing search results.
	Search Statistics	Displays the search statistics such as the number of results shown on the current page, total number of results and time taken to perform the search.
	Search Summary	This Web Part displays the “Did you mean” feature for the search terms.
	Top Federated Results	This Web Part displays the Top Federated result from the configured location.
Site Directory	Categories	Displays categories from the Site Directory
	Sites in Categories	Displays sites in the Site Directory
	Top Sites	Display the top sites from the Site Directory

Appendix C – Glossary

Term	Description
Blog	Web log
CPU	Central Processing Unit
DI	Desktop Integration
FP	ForumPass
FTP	File Transfer Protocol
GHz	Gigahertz
HTTP	Hyper Text Transfer Protocol
HTTPS	Secure HTTP
IRM	Information Rights Management
JRE	Java Runtime Environment
MAG	Managed Access Gateway (Exostar's provided application to access multiple secure offerings)
MB	Megabyte
MHz	Megahertz
MOSS	MOSS – Microsoft Office SharePoint Services
MS	Microsoft
OOTB	Out Of The Box SharePoint
OS	Operating System
RMS	Rights Management Services
RSS	Really Simple Syndication (A family of web feed formats used to publish frequently updated pages)
S/MIME	Secure/Multipurpose Internet Mail Extensions
SSL/TLS	Secure Sockets Layer (SSL) a communications protocol (now referred to as Transport Security Layer (TLS)
XML	Extended Markup Language