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Chapter I: Introduction

This user manual is prepared to address the usage of the collaboration features present on the ECA knowledge hub site. Currently there are three collaboration functionalities present on the site. These are:

1. **The ECA Discourse**: An ECA-sponsored peer-to-peer facilitation service for ECA staff, conference participants, development partners/practitioners and policy makers to come together and discuss issues of common interest and concern by sharing their knowledge and experiences towards the common objective of enabling the economic transformation of Africa.

2. **Team Project Portal**: The ECA Team Project Portal is an ECA service allowing ECA staff, conference participants, development partners/practitioners and policy makers to come together and manage a joint-project using standard project management tools. The ECA Shared Project portal allows multiple stakeholders to have visibility across a shared project with features such as task assignment, notifications, reporting, Gantt charts, etc.

3. **Live Document Services**: The ECA Live Document service is a real-time document collaboration service that allows multiple people to collaborate in real-time around a single document all working together at the same time. The service allows users to author documents, publications, reports, etc. together with ECA colleagues, conference participants, development partners, and policy makers, all working on the same document at the same time.

**Exploring the ECA Knowledge Hub Site**

The ECA Knowledge hub is one stop-shop to information on the latest social and economic development issues in Africa. The site can be reached by typing the site address (URL) [http://knowledge.uneca.org/](http://knowledge.uneca.org/) at your browser. The site shown in Figure 1 appears.

*Figure 1: The ECA Knowledge Hub home page*
To access feature of the site, click on the “Menu” link at the top left corner of the screen shown in yellow background or click on the “Access ECA Knowledge” button in the middle of the screen also shown in yellow background (refer to Figure 2 bellow)

![ECA Knowledge Hub menu links](image)

*Figure 2: ECA Knowledge hub menu links*

Upon clicking on the links the screen shown in Figure 3 appears

![ECA Knowledge Hub main menu items lists](image)

*Figure 3: ECA Knowledge Hub main menu items lists*

Since our interest is in the collaborate feature, clicking on the menu item link “Collaborate” shown in red circle in Figure 3 above will take us to the collaborate page shown in Figure 4 bellow
Clicking on the links shown in red circle on Figure 5 will take us to the specific collaboration features

- Clicking on “The ECA Discourse” will redirect us to the discussion forum service portal
- Clicking on “Team Project Portal” will redirect us to the project collaboration service portal
- Clicking on “Live Documents Services” will redirect us to the document collaboration portal
Chapter II: The ECA Discourse

The ECA discourse home page shown in Figure 6 provides links to perform different functions in the forum.

![ECA Discourse home page](image)

The following functions can be performed from the home page:

1. The top bar provides features to Search the Site, Change language (English, French), Sign Up (to register new users) and Log in (for already registered user to login)
2. The left pane provides features to Start a new discussion and provides links to show all discussions or specific discussion topics (tags)
3. The middle pane shows discussion topics as selected from the left pane. By default, it shows all discussions. To change to a specific topic or tag select your desired tag from the left pane.

Please note that only registered users can start new discussion or reply to comments.

New user registration

If you are new to the discourse service portal click on the sign up link at the top bar as shown in Figure 7.

![Figure 7 ECA knowledge Hub Sign up link](image)

The sign up page pops up as shown in Figure 8.

![Figure 8: The ECA Discourse Sign up page](image)

To proceed with the sign up fill in the required information (User Name, your email and your password for the site) and Click on “Sign Up”
You will be redirected to the home page with a message to activate your account from your email address as shown in Figure 9.

The next step is to activate your account from your email account. If you do not receive an email, click on “RESEND CONFIRMATION EMAIL”

Logging In
If you already have an account on the ECA discourse portal click on the login link at the top right section of the portal as shown in Figure 10.

Figure 9 The ECA Discourse Sign up message

Figure 10
Figure 10 The ECA Discourse login link

Clicking on the “LogIn” link will pop up the login screen as shown in Figure 11

Figure 11 The ECA discourse login page

Fill in the required information (User name or Email and your password) and click on log in. If wrong information is entered, the following screen is displayed (Figure 12)
If your login is correct you will be redirected to the home page with your account name displayed at the top right corner of the screen (Figure 13).

Setting Personal Profile

After login in, to setup your personal profile click on your login name at the top right corner (Figure 14) and click on the profile link.
On the profile setting page (Figure 15) the logged in user can set his/her own details as well as get general information.

![Figure 15 The ECA Discourse Profile setting page](image)

On the profile setting page you can set:

1. Your Profile Image by clicking on the plus icon inside the circle to the left of your name
2. Write short text describing you (just below your user name)
3. Make Settings changes (Figure 16) which enable to change account information, notification and privacy settings
4. In addition, you will have reports related to:
   a. How many posts you have made,
   b. Number of discussions you participated on
   c. Number of mentions made to you

The details can be found by clicking the links for each (posts, discussions and mentions)
Starting a new discussion

To start a new discussion, click on “Start a Discussion” link on the home page (Figure 17)

A popup screen appears at the bottom of the home page as shown in Figure 18
On the popup windows

- Choose you tag,
- Type the Discussion Title
- Write your post
- Finally, when done, click on Post Discussion

The new created discussion appears on the home page (Figure 19)
Interacting with newly created forums

After creating a new discussion, the owner/creator can perform additional tasks such as renaming the title, following other participating in the discussion, or deleting the discussion as a whole. To do that click on the vertical three dots to the right of the forum name as shown Figure 20

![Forum Options](image)

*Figure 20 Setting options for newly created topics*

Besides this clicking on the forum title will also take to a dedicated page where one can see the reply of others and also can set the options indicated above. The dedicated page for each discussion is shown Figure 21 bellow
Editing individual posts

When a discussion is created different users can post to the topic. Each individual can edit or delete his/her own post. This can be done by clicking on the horizontal ellipsis (three dots) at the right end of each post (Figure 22). You can either edit or delete the post.

Replying to a post on existing topics

If you are a logged in user, you can reply to other people posts. This can be done by typing inside the reply box or clicking on the “Reply” button on the right pane. When writing a post to address a specific individual use the “@” tag. This will bring option of available users as shown in Figure 23.
Figure 23 Replying to posts

The discussion topic looks like as shown in Figure 24 bellow after a second person posts to a topic

Figure 24 Discussion topic after a second person posts
The discussion topic creator and anybody following the discussion will be notified when new posts are made unless it is turned off as shown in Figure 25. Clicking on the notification will bring a list of the notifications (Figure 26). Then clicking on the individual notification again, will take you to the specific discussion topic.

![Figure 25 Notification after a new post](image)

![Figure 26 Notification popup list](image)

Based on the site setting a new post may not be publicly visible write away. If there is a site moderator, it has to be approved as shown in Figure 27
The red circle shows the specific user is a moderator/Admin. On his/her screen, he will find an approval notification where he can approve or delete the post. After approval, the post appears for all to see and reply to.

After four replies, the discussion topic looks like as shown in Figure 28. If you like a specific post you can like it by hovering over the topic and clicking on like (Figure 29)

Figure 27 Approval of a post
Figure 28 The discussion topic after 4 posts

Following up a topic

To follow up a topic, hover you mouse over the topic on click on “Follow” in the vertical ellipsis (three dots) as shown in Figure 30
When you are following a specific topic a circle in yellow appears in the topic as shown in Figure 31.

To unfollow a topic just click on the vertical ellipse where you clicked on follow. This time the follow text will be replace by unfollow (Figure 32)

Searching the forum

To search on the home page type in your key word the top of the screen (Figure 33), the system popup option related to your keyword. You can either select from the lists or click on enter to search.
The search result will be displayed in the middle of the screen, with the keyword highlighted (Figure 34).

Figure 33 Searching for topics

Figure 34 Search results page
CHAPTER III: ECA Project Management Portal

To go to the ECA project management portal click on the “Team Project Portal” link as shown in chapter I (Figure 5: ECA knowledge hub collaboration features links). The link will take us to the login screen of the project management portal (Figure 35 Project management Portal login Screen).

On the screen, type in your account information (your email and password) assigned from your administrator and click on “Login”. If you have entered an invalid credential, you will receive a
notification (Figure 36) and you have to reenter your account information. If your credentials are valid you will be redirected to the home page of the project management portal (Figure 37).

Please note that if you do not have an account information please communicate to your project leader or administrator who can create accounts for their team members. If
The project management portal has three sections:

1. **Left Pane**: This area hosts application menus where a user can select to perform specific activity
2. **Top Pane**: This hosts the application name, which when clicked will take you to the home page, and on the right side of it shows the logged in user name. Clicking on the user name will enable you to set personal profiles as well as provide you functionality to log out.
3. **Middle Pane**: This area presents information or data entry form based on the functionality selected from the Left Pane.

**Managing projects**

**Creating a New Project**

Users can view their project or create new projects. To perform tasks related to new project expand the projects menu (Figure 38)
To create a new project, click on “Add Project”. The screen shown in Figure 39 appears. The popup page has three sections of data to be filled:

1. **General Information**: Project Name, Type, Status, Project Site, Project Phases (Figure 39)
2. **Team Information**: Area to select team member who will participate on the project (Figure 40). If your team member does not exist on the list, then an account has to be created for the user (Adding a new user)
3. **Attachments**: If there are any documents to be attached, by clicking on the attachment tab a feature to upload documents will be visible (Figure 41)
Figure 39 Project management portal project creation

Figure 40 Project management portal team selection
After making any changes to the data entry forms please do not forget to click on “Save” so that the data will be persisted.

**Viewing existing projects**

To view or edit created project clicking on the “View All” button under the project menu (Figure 38) will take us to project view page (Figure 42). Under the action column, the user can either edit or delete the project.

While viewing a project list we can use filters to shorten the result displayed (Figure 43). Project can be filtered by status, project type or team members.
Adding new task to a project

Once a project is created, the next logical step is to create a task for it. To do so expand the task menu on the left pane and click on “Add task” (Figure 44). Then the task management screen shown in Figure 45 appears.

On the new task creation page three basic information has to be filled

1. **General Information:** This will enable entry of task name, status, to whom it is assigned, priority etc.
2. **Time Information:** This will enable entry for task start and end time, progress and estimated time to complete the task (Figure 46)
3. **Attachments:** If there are any documents to be attached, by clicking on the attachment tab a feature to upload documents will be visible (Figure 47)
Whenever a task is assigned to a team member, the system will automatically send an email reminder to the team member.

*Figure 45 Project management portal new task creation*
Viewing existing tasks

Once a new task is created it can be visible in the task view all page (Figure 44). To view all task under a given project, click on “View All” button under the task menu (Figure 48)
By selecting each task, we can either edit or delete the task. On each task we can edit the information to change the status (for example from open to closed) or modify the progress markers. If the number of tasks displayed are many we can use filters to shorten the results (Figure 49). A task can be filtered by Priority, status, label, type, team member, project it belongs to, project status and project type.

Managing task groups, versions and Phases

Once a project and tasks are created we can group tasks, create versions and break tasks into phases. To create groups, view existing tasks or projects and click on the project/task name (Figure 50)
Figure 50 Project management portal viewing detail of each task

Clicking on a specific task will take us to the detail page as shown in

Figure 51 Project management portal task detail page

From the menu bar highlighted in red circle in Figure 51 we can use:

1. Task Groups menu link to create and view groups
2. Versions menu link to create and view versions
3. Phases menu link to create and view phases

To create a new group, click on Task Groups - > Add Group, the page shown Figure 52 appears, type the group name and save.
To create a new version, click on Version - > Add Version, the page shown Figure 53 appears, type the status, version name, description and due date and click on save.

To create a new phase, click on Phase - > Add Phase, the page shown Figure 54 appears, type the status, version name, description and due date and click on save.
Once a group, version or phase is created, we can edit or delete them by viewing them to do so we can click on “View All” from their respective menus (Figure 51).

1. To view groups: Task Groups -> View All
2. To view versions: Versions -> View All
3. To view Phases: Phases -> View All

Clicking on the “View All” link will take us to the detail page where we can see groups. Figure 55 shows the view all page for phases.

**Associating groups, version and phases to a task**

To associate a task to a given group, version or phase we have to start by viewing existing tasks. Once a list of existing tasks appears, we have to edit the specific task. On the popup page that
appears (Figure 56) we can associate the task to groups, phases and version. After associating click on save.

![Image](image1.png)

**Figure 56 Project management portal associating task to group, version and phases**

**Commenting on tasks**

To comment on existing task, you have to view the existing tasks as described in the previous topics (Viewing existing tasks). Once the list of tasks appears click on the name of the task you want to comment on. This will take you the screen shown below (Figure 57)

![Image](image2.png)

**Figure 57 Project management portal commenting on a task**

**Tickets**

Tickets are used to raise some point/question that needs attention by a service desk or admin personnel. This could be a simple raising question or reporting a bug to name a few.
Adding a new ticket

To create a new ticket, expand the ticket menu and click on “Add Ticket” (Figure 58). The ticket data entry form appears (Figure 59).

![Figure 58 Project management portal ticket menu item](image1)

![Figure 59 Project management portal ticket data entry](image2)
On the new ticket creation page two basic information has to be filled

1. **General Information:** This will enable entry of department raising the ticket, type of ticket, status, subject and description for the ticket
2. **Attachments:** If there are any documents to be attached, by clicking on the attachment tab a feature to upload documents will be visible (Figure 60Figure 47Figure 41)

![New Ticket](image)

*Figure 60 Project management portal ticket document attachment screen*

**Viewing existing tickets**

To view or edit existing tickets clicking on the “View All” button under the ticket menu (Figure 38) will take us to ticket view page (Figure 61). Under the action column, the user can either edit or delete the ticket.
Managing Users

Adding a new user

To add a new user to the project management portal, click on “Add User” under the Users menu on the left pane. (Figure 62)

Clicking on the “Add User” will take us to user creation screen (Figure 63). Fill in the required information and click on Save. The login details will be sent to the user.
Managing existing users

To manage existing user, click on the “View All” button under the Users menu item. The screen shown in Figure 64 appears. We can either edit the details of the user or delete the user if not longer required.

Sending Emails

The project management portal enables us to send email to existing users. To do that click on the “Send Email” options under the Users menu item. This action will present us the send email page shown in Figure 65.
Reports

The project management portal has features for different aspect of projects that are defined in the system. To view reports, click on the Reports menu item link.

There are five type of reports:

1. Project Reports
2. Task Reports
3. Ticket Reports
4. Time Reports
5. And Ghannt Chart
Clicking on any of the links takes us the report selection view page, where we can create our report and save if for viewing (Figure 67). If there are pre-defined reports we can view them by clicking the name of the report (for example in Figure 67 we can click on “Task by Type” exiting report resulting in the report shown in Figure 68). Once a report is opened we can analyse it or if we can edit it by clicking on the “Edit Report” button.

![Project management portal report view page](image1)

**Figure 67** Project management portal report view page

![Project management portal sample report](image2)

**Figure 68** Project management portal sample report

If we do not see the kind of report we want we can create our own report by clicking on “Add Report” (Figure 67). This will take us to the project creation page shown in Figure 69.
Once we select parameters for our report, we can type a descriptive name for the report and save it. Once saved the report appears in the report view page (Figure 70) for its type (project, task, ticket etc...).

Profile Management
Each user of the system can manage their own personal profile by clicking on the drop down link from their user name (Figure 71)
Figure 71 Project management portal personal profile

From the drop down menu user can manage:

1. Personal Details: The link will enable user to change their password, upload photo or change system language setting (Figure 72)
2. My Time Report: Enable users to see their performance report
3. My Scheduler: Enable users to set their calendar and schedules
4. Change Skin: Enable users to change the skin/colour of the software to fit their preference
5. Log Off: Enables the user to sign out of the system
Managing Schedules

To manage personal schedules click on “My Scheduler” link (Figure 71). The page shown on Figure 73 appears. On this page, any schedules you have saved will show up. To enter new schedule, click on any cell. The screen shown in Figure 74 appears.

![Figure 73 Project management portal schedule view page](image)

![Figure 74 Project management portal new event registration](image)

Fill in the subject, start date, end date and details. If there are document attachments upload the document. Finally click on save. The saved detail will appear on the schedule viewer (Figure 75)
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<tbody>
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</tr>
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</table>

*Figure 75 Project management portal registered event view*
Chapter IV: Live Document Service

To go to the ECA Live Documents Service portal click on the “Live Documents Services” link as shown in chapter I (Figure 5: ECA knowledge hub collaboration features links). The link will take us to the login screen of the portal (Figure 76)

Figure 76: Live document services login screen

The login screen will allow the following functionalities:

1. Registration of new users
2. Logging in as anonymous users or
3. Logging with registered user credentials

Credential management

Registering as a new user

To register as a new user click on the register link (Figure 77). This will pop up the register link shown in Figure 78. On the Screen input your full name, email address and your password for your site. Finally accept the terms of usage and click on the register button. You will receive a confirmation message (Figure 79). Once the system administrator approves your registration, your account will be activated.
Figure 77 Live documents service register link

Figure 78 Live Document Service registration screen
Logging with existing account information

If you already have a user account for the live document services portal you can login to the site by clicking on the login link (Figure 80). This will open the login window show in Figure 81.

Type in your credentials (email address and password) and click on login. If correct credential is provided you will be redirected to the home page (Figure 82).
Logging as anonymous user
If you just want to work on a document without having to register type in a document name (pad name) and click on open as shown in Figure 83. Documents created this way will be publicly available.
Creating Groups and pads

If you are a registered user, you have the option of creating two kind of document from your home page (Figure 82). Registered user can create:

1. Private Groups: Only users belonging to the group can collaborate on the document. (Figure 84)
2. Public pads: All public user can work on the document (Figure 85)
Creating a private group

To create a private group type in the group name and click on the create link (Figure 84). This will open a window where you can add users to the group.

Once a user is added to the group, you can access your groups by clicking on the group from the links shown in Figure 87
Figure 87 Live document service group lists

Clicking on the group list will take you the group page (Figure 88)

Figure 88 Live document service group page
Creating a private pad
After forming a group, a pad has to be created. To do this type in the pad name and click on the create button (Figure 88). Once a pad is created, the list of pads appear on the group page (Figure 89)

Figure 89 Live document services pad lists

Clicking on the pad link (Figure 89) will take you the document collaboration page (Figure 90)

Figure 90 Live document service collaboration page
Creating a public pad
To create a public pad type in the pad name and click on create on the home screen (Figure 85). This will take you the live document collaboration page (Figure 90)

Working on a live document
The live document collaboration page (Figure 90) will enable multiple users to work on a single document. The screen will be the same for logged in or anonymous users. The screen is also similar for private or public pads.

![Live document service collaboration page sections](image)

*Figure 91 Live document service collaboration page sections*

The screen provides the following sections (Figure 91):

1. **Document editing shortcuts (Shown in red mark):** This will provide functionality to edit our document such as making text bold, italic, text aligning, changing font type etc...
2. **Collaboration Menu links (Shown in blue mark):** This will enable printing of document, showing revisions made on the document, save revisions, sending an invitation to people or seeing members of the group
3. **Users working on the group (Shown in black mark):** This will show active users working on the document. The colours on the document correspond to the user’s colour, which is intended to indicate which user edited the specific text. As shown in Figure 91 the current user is “Yishak” shown in light green. In case of public pad, if your user name is blank, please type in your user name. Any Edits made by this user will be shown in light green (Figure 92)
4. **Document Editing Section:** The screen will enable us to type in our text for the document. This is where we type all content for the document
After typing in your content click on the “Star” icon (Collaboration menu) to save your revision.

Screen shot of multiple users working on a single document is shown in Figure 93.

Figure 92 Live document services document edit marking

Figure 93 Live document service multiple users working on a single document

Collaboration Menu link
- Click on the print icon to print the document
- Click on the arrows to export the document to other formats such as word or html
- Click on the clock icon to view the revision made on the document
- Click on the start to save your document
- Click on the gear to set the setting for the document
- Click on the “<>/” icon to send invitation to users
- Click on the users icon to view users working on the document