



EXTRANET TEAM'S PORTAL USER MANUAL

Extranet team's portal manual

UNITED NATIONS ECONOMIC COMMISSION FOR AFRICA Addis Ababa, Ethiopia



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Introduction

This user manual details the usage of ECA's extranet team's portal. The document discusses points related to managing sites, content, users, calendars, documents, discussion forums and other features of the portal.

Logging in

The extranet team's portal is located at <https://teams.uneca.org>. The home page of the portal looks like the screen shot in Figure 1, provide your user credentials and click on 'Log in' button.

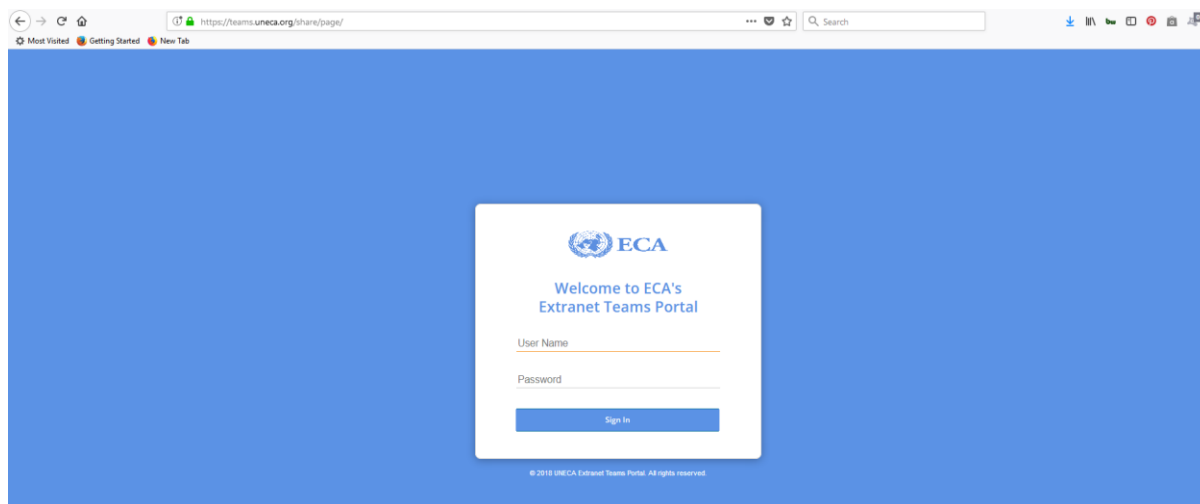


Figure 1 Extranet Team's Portal home page

Once you logged in you can proceed to do your documents and data management. If you do not have an account please contact your system administrator.

Finding Your Way Around

Extranet Team's Portal Share toolbar

The toolbar is designed to help you to navigate Extranet Team's Portal Share and to quickly find, create, and share content.

It's always available at the top of the page, wherever you are in Share.

Home

Opens your user dashboard (or any screen that you have selected to be your home page).

My Files

Opens the My Files area where you can store your own personal content.

Shared Files

Opens the Shared Files area where you can quickly share content with other users without adding it to a site.

Sites



Options to open a recent or favourite site, create a site, view all the sites you're a member of, or open the Site Finder page where you can search for sites and manage your site membership.

Tasks

Options to open the My Tasks page where you can manage your tasks, or view workflows that you've started.

People

Opens the People Finder page where you search for other users.

Repository

Opens the repository which shows all the content stored in Extranet Team's Portal Content Services.

Admin Tools

System administrators only have this option which opens the Admin Tools.

Sites Manager

Only Extranet Team's Portal administrators and Site administrators have this option which opens the Sites Manager. If you are an Extranet Team's Portal administrator, you can access the Site Manager through the **Admin Tools** on the toolbar. If you are a Site administrator, you'll have an additional **Sites Manager** option on the toolbar.

User menu

Click on your name to open the user menu. You can access your user profile, change your password, open the user help, and log out.

Search

Use the search box to find files, sites, and people.



Figure 2 : Main toolbar

User dashboard

Wherever you are in Extranet Team's Portal Share, you can click **Home** or **User Dashboard** on your user menu to go to your dashboard.

The dashlets (areas on your dashboard that show data from another area or feature of a site) on this page give you a simple and up-to-date overview of what's been going on in the sites you're a member of.

Important: If you've set your home page then when you click **Home** that page will open.

You can customize your dashboard to display the information that interests you. Each dashlet you select is displayed on the dashboard. The available dashlets are:

My Sites

Displays the sites that you belong to



My Activities

Tracks the most recent activities in your sites

My Tasks

Displays your tasks

My Documents

Tracks your content in all site libraries

My Profile

Displays a summary of your personal details

My Calendar

Displays upcoming events scheduled for your sites

Content I'm Editing

Displays the last three library items, blog posts (drafts, not published posts), wiki pages, and discussion forum posts that you edited

Web View

Display a website which you select by hovering over the dashlet on your dashboard

RSS Feed

Hover over the dashlet on your dashboard to select an RSS feed (displays the Extranet Team's Portal website feed by default)

Extranet Team's Portal Add-ons RSS Feed

Displays the latest news from the Extranet Team's Portal Add-ons website by default

My Discussions

Displays the most recent topics created in the discussion forums of all sites you belong to

Site Search

Let's you quickly search all sites you belong to

Saved Search

Displays the results of a specific search that you configure

My Document Workspaces

Displays all Document Workspace sites that you belong to (Document Workspaces are created in Microsoft Word)

You can resize most dashlets. To resize a dashlet click and drag on the bottom edge of the dashlet until it's the height you want. This is saved between sessions.

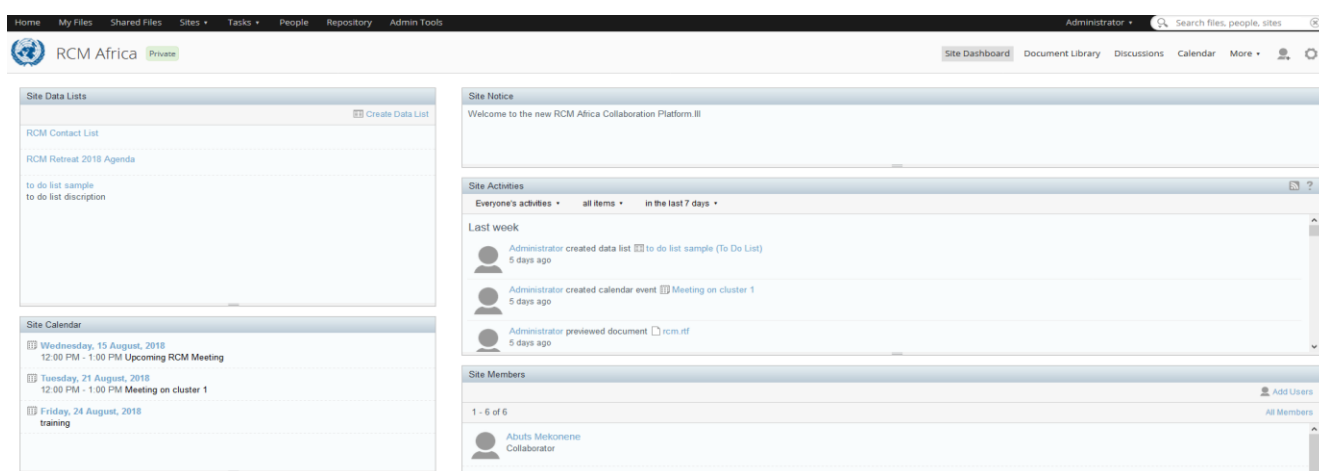


Figure 3 : The dashboard

What can I do with my dashlets?

As well as giving you an overview of activity and information in Extranet Team's Portal Share, the dashlets also give you links to various areas of Share and let you carry out a range of actions.

Tip: When a user name, site name, or item appears as a link, you can click it to navigate to the related page.

Each dashlet has a unique role:

My Sites

Lists the sites you belong to.

- Click **Create Site** to start a new site.
- Click a site name to go to that site.
- Use the filter to display all sites, recent sites, or just your favourite sites.
- Mark a site as a favourite or revoke its "favourite site" status.
- Click the **Delete** icon to delete the site and its contents. (Managers only)

My Activities

Tracks the most recent activities in your sites.

- Use the filters to specify the activities you want to see and for what time period.
- Subscribe to the RSS feed to automatically receive activity updates.

My Tasks

Displays your tasks.

- Click **Start Workflow** to start a workflow for yourself or another user.
- Click **Active Tasks** or **Completed Tasks** to view those tasks.
- Click the **View Task** icon to view the details for a specific task.
- Click the **Edit Task** icon or the task name to manage a task.



My Documents

Tracks your content in all site libraries.

- Use the filter to choose the information you want to see.
- Select a view option: **Simple** or **Detailed**.
- Mark an item as a favourite or revoke its "favourite" status. (Detailed view only)
- *Like* an item or *unlike* an item. (Detailed view only)
- Click **Comment** to provide feedback. (Detailed view only)


My Profile

Shows a summary of your personal details.

- Click **View Full Profile** (or your name) to go to your user profile.


Web View

Displays the website of your choice.

- Click the  configure icon to specify the website.
- Click the dashlet title to open the website in a separate window.

RSS Feed

Displays the Extranet Team's Portal website feed by default.

- Click the  configure icon to change the RSS feed.

Extranet Team's Portal Add-ons RSS Feed

Displays the Newest Add-ons feed from the Extranet Team's Portal Add-ons website by default.

- Click the  configure icon to change the RSS feed.

My Discussions

Shows the most recent topics created in the discussion forums of your sites.

- Use the filter to choose the information you want to see.


Site Search

Lets you search all the sites you belong to.

- Enter search criteria and click **Search** (or press ENTER).
- Select the maximum number of results you want to display.

Saved Search

Displays the results of a pre-configured search.

- Click the  configure icon to define the search.



My Document Workspaces

Displays all Document Workspace sites that you belong to (Document Workspaces are created in Microsoft Word)

- Delete a workspace if you have the correct permissions.

My Meeting Workspaces

Displays all Meeting Workspace sites that you belong to (Meeting Workspaces are created in Microsoft Outlook)

- Delete a workspace if you have the correct permissions.

Viewing your user profile

Your user profile includes more information than just your contact details. Here you can see at a glance who you are following, who is following you, the sites you belong to, and the content you have recently added and modified.

1. Open the user menu on the toolbar.
2. Click **My Profile**.

Tip: You can also access your user profile from the My Profile dashlet: click **View Full Profile**.

3. Navigate your profile pages to view and manage your information:

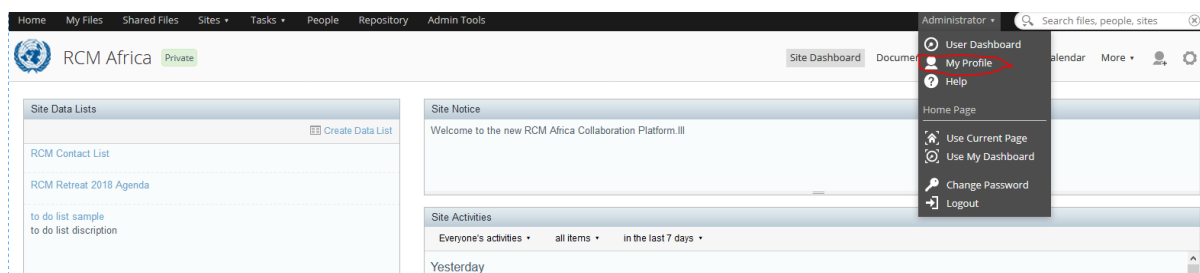


Figure 4 : My Profile menu item

Info

Displays your personal details, including contact information, company details, and a photo

Sites

Lists the sites you're a member of and lets you disable and enable activity feeds from those sites

Content

Displays two lists detailing your recent activities: **Recently added** (last 5 pieces of content you added), **recently modified** (last 5 pieces of content you edited)

I'm following

Lists the people you are following

Following Me

Lists the people who are following you



Change Password

Lets you change your password

Notifications

Lets you specify whether or not you want to receive email notifications

Trashcan

Lets you find and recover deleted content

Cloud Sync

Lets you connect to your Extranet Team's Portal Share in the Cloud account so that you can synchronize your content.

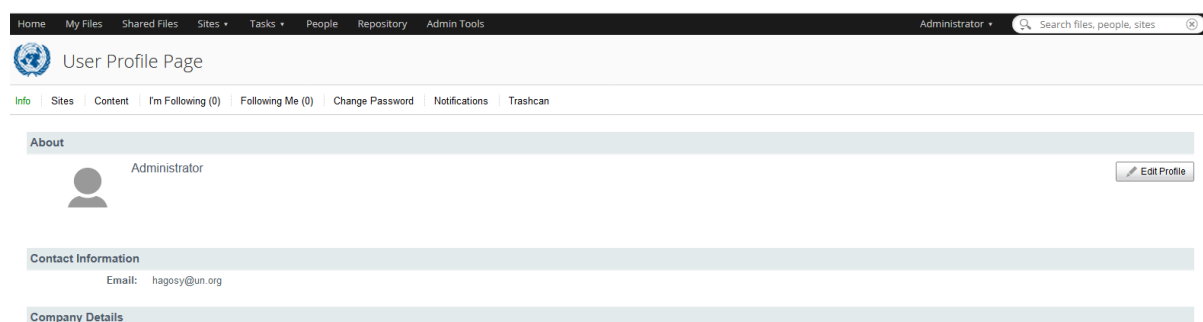


Figure 5 : User Profile page

Your profile and dashboard

Customizing your dashboard

You can change the layout of your dashboard and choose from a number of dashlets to show the information you want to see. If you want, add multiple copies of each dashlet and then set the filters so that each one displays different information.

Note: The Get Started panel links to the Extranet Team's Portal Share Help where you can watch help videos. You can always Hide it and show it again later.

1. Click  to start customizing your dashboard.

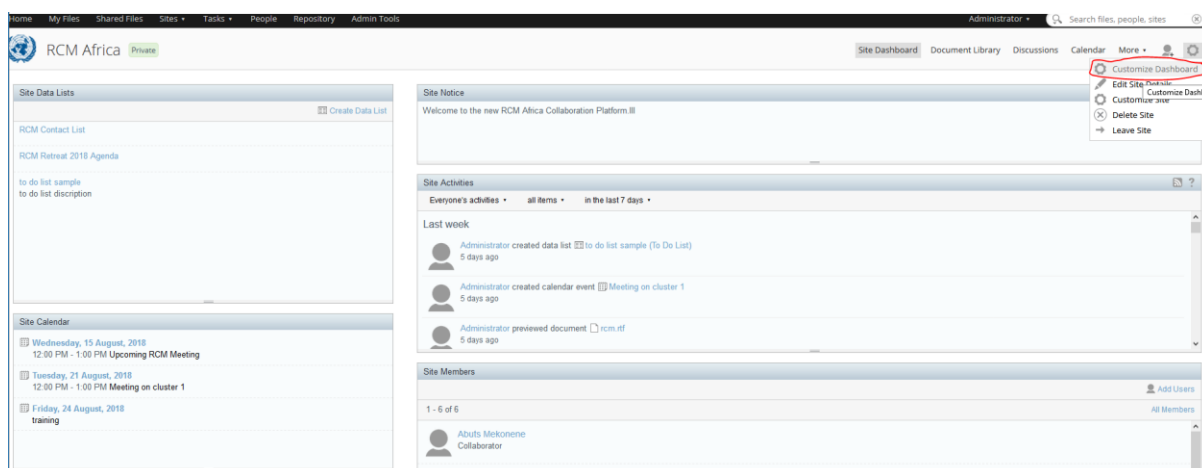


Figure 6 : Customize dashboard

2. Change the dashboard layout:

- a. Click Change Layout.
- b. Select a layout.

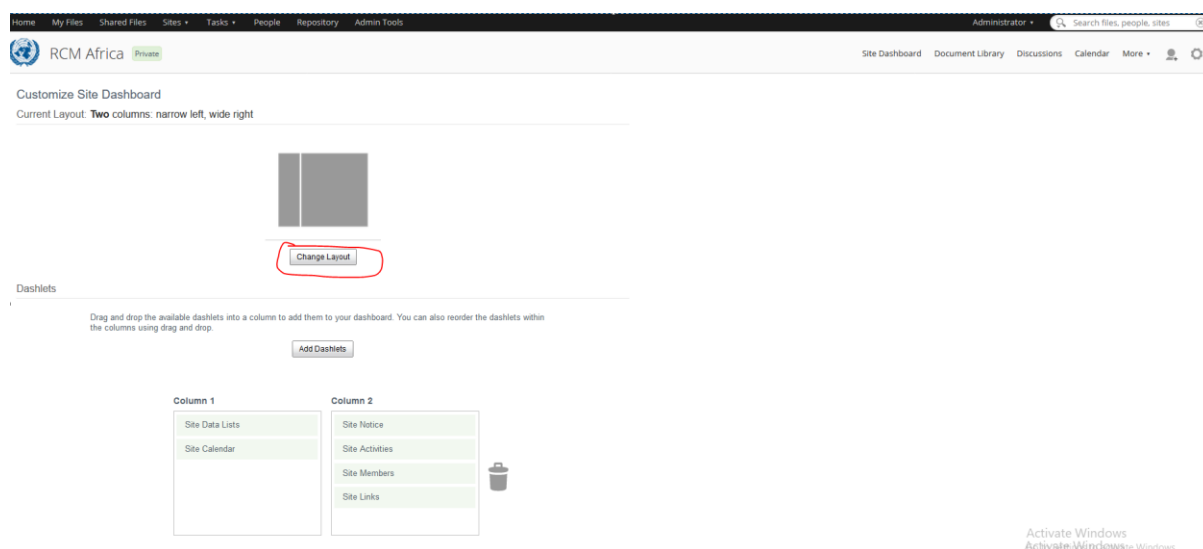


Figure 7: Change dashboard layout

3. To select your dashlets:

- a. Click Add Dashlets.
- b. Drag and drop dashlets from the Add Dashlets section onto the columns below.

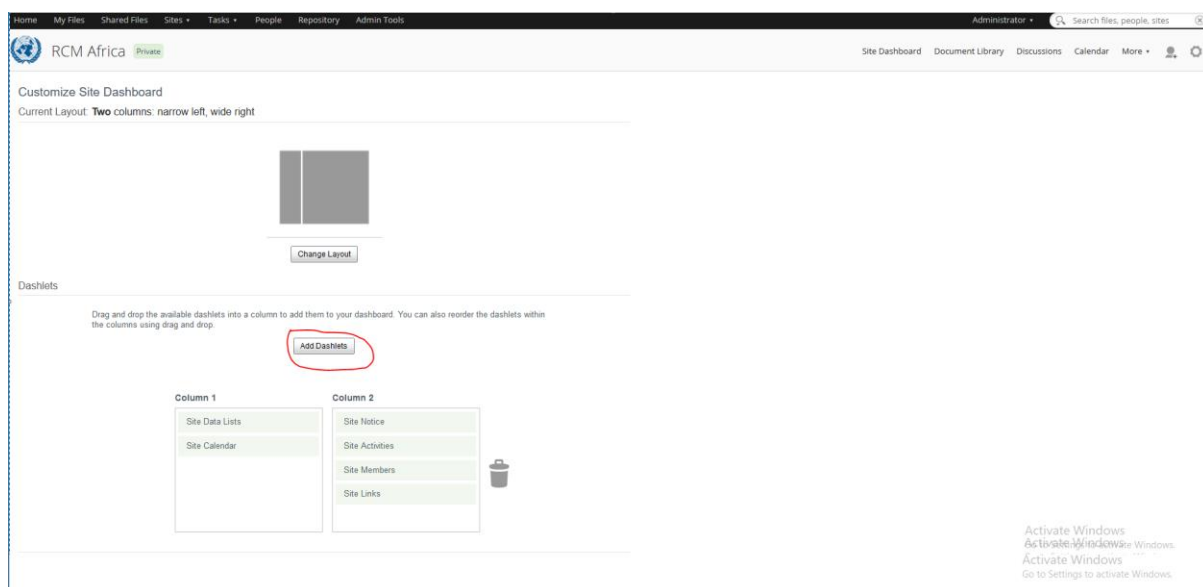


Figure 8 : Add Dashlets on your dashboard

Note: You can drag and drop dashlets around the columns to change the display order, or to the trash can (or press DELETE) to remove them.

4. Click OK to save the dashboard configuration.

Setting your home page

Your default Extranet Team's Portal Share home page is your user dashboard, but you can set it to be any page in Share that you have access to. This can save you time if most of your work is done from a specific Share location, by taking you straight to that screen every time you sign in.

1. Go to the page that you want to be your home page.
2. Click your user name and select Use Current Page.

That's it. Now, every time you sign in Share will open on this page. You can change this whenever you want to or select Use My Dashboard to set your home page back to your dashboard.

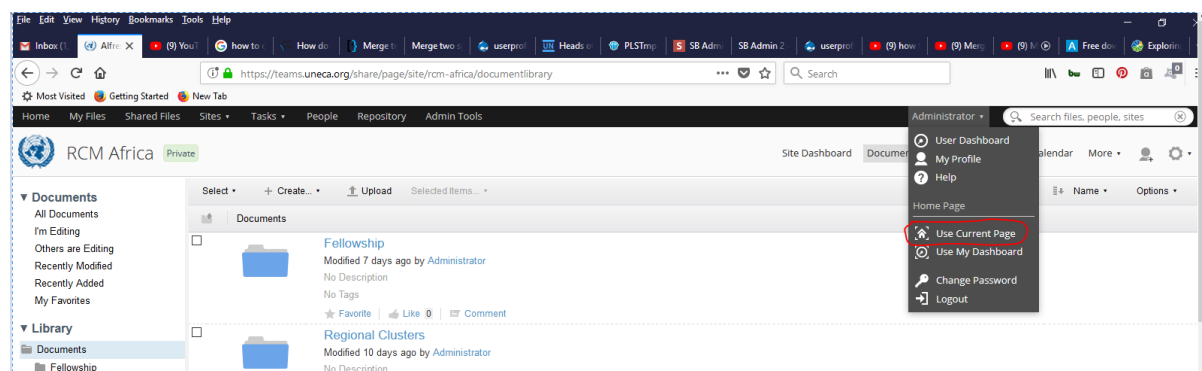


Figure 9 : Setting current page



Updating your profile

User profiles help you to identify a user's roles and responsibilities, or even find out who's who in your organization by checking profile pictures. When you click on your name at the top of the screen a menu opens where you can update profile details, change your password, search the help, and log out.

1. Click your user name and select My Profile, then Edit Profile.

Note: You can also select View My Profile from the My Profile dashlet.

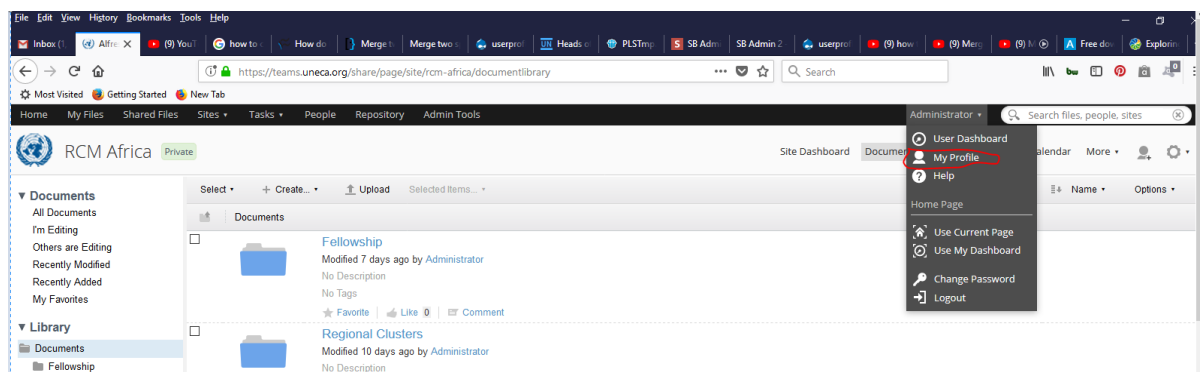


Figure 10 : My Profile menu link

2. Enter all the details that you want to show in your profile, including a picture if you want, then click Save Changes.

Note: If you already had a profile photo, uploading a new one overwrites it.

If you enter a Google Username it will be used as the default account when you edit or create Google Docs.

3. Click Home and you can see the updated details in the My Profile dashlet.

When your colleagues view your profile, they'll see all the details you've entered and know exactly what you're working on.

Following people

You can follow users you're interested in so that you can easily keep track of what they've been working on.

1. Click People and search for a user. You can also follow users by clicking a user's name wherever you see it to display their profile page.
2. Click Follow.

An email is sent telling the user that you're following them. You can't follow a user without them knowing.

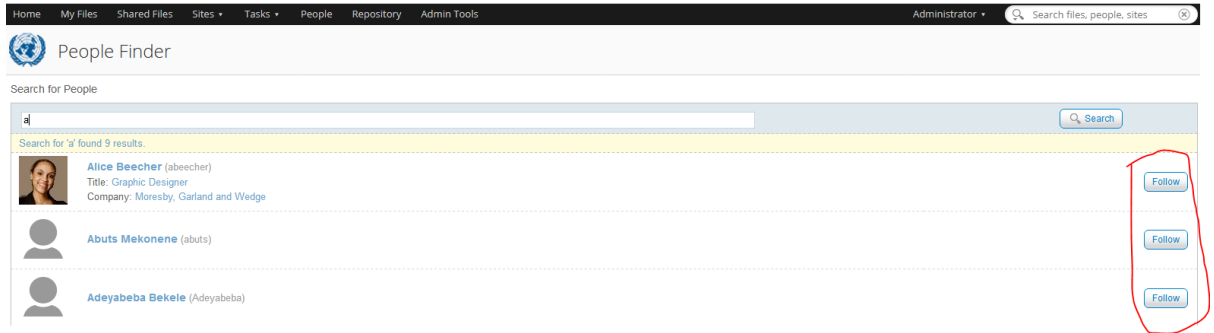


Figure 11 : Follow link

3. Open the I'm Following page of your user profile. You see a list of the users you are following.

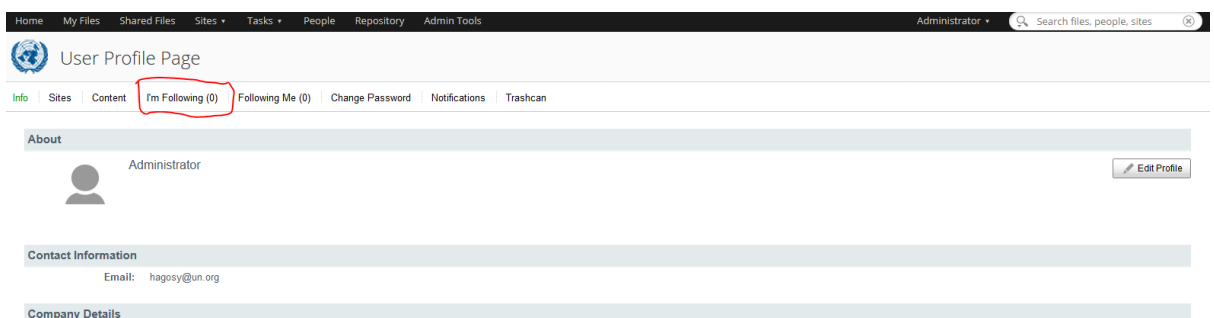


Figure 12: Page showing 'I am following'

4. You can select the Private check box to hide your I'm Following page from other users.

Note: Even when your list is private, email notifications will be sent to people you choose to follow.

When your list is private, the I'm Following page doesn't appear to people viewing your profile.

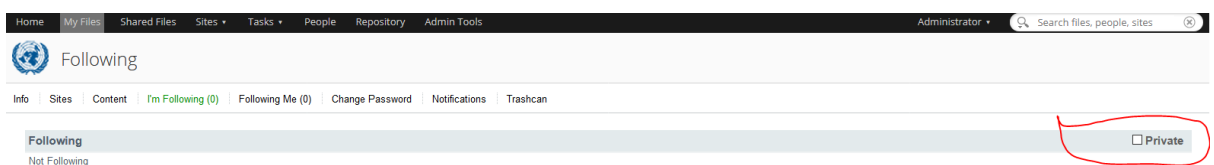


Figure 13: Making user following private

5. Click Unfollow to stop following someone.



Changing your password

Change your password for increased security.

1. Click your user name on the toolbar and click Change Password.

Note: This option might not be available if your company passwords are kept in an external password management system.

2. Type your current password in the Enter Old Password field.
3. Type your new password in the Enter New Password and Confirm New Password fields. Your password must be at least ten characters long and use a combination of uppercase and lowercase letters, numbers, and symbols.
4. Click OK.

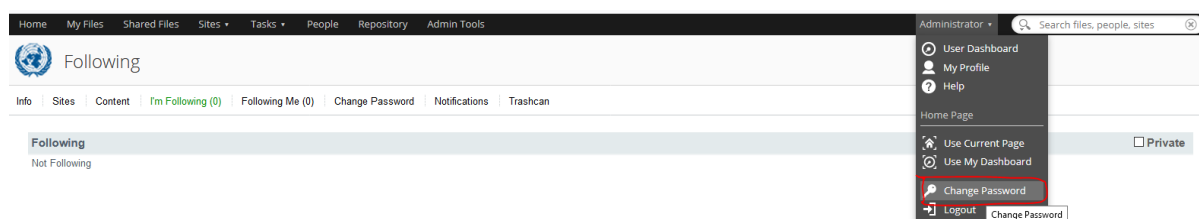


Figure 14 : Changing password

Sites

A site is a area where you can share content and collaborate with other site members. Any user can create a site. The site creator becomes the Site Manager by default, though additional or alternate managers can be added after this. Each site has a visibility setting that marks the site as *public*, *moderated*, or *private*. This setting controls who can see the site and how users become site members.

Public site

- All users can view the content but only site members can work with the content.
- Any user can join the site.

Moderated site

- All users can access the site but only site members can see and work with the content.
- Users must ask to join the site.


Private site

- Only site members can access the site.
- Users must be added to the site by a site manager.

The manager of any site—whether public or private—can add users.

Note: The visibility setting of a site is displayed next to the site name when you're in the site.



You can remove yourself from a site at any time by clicking  in the site and selecting Leave Site.

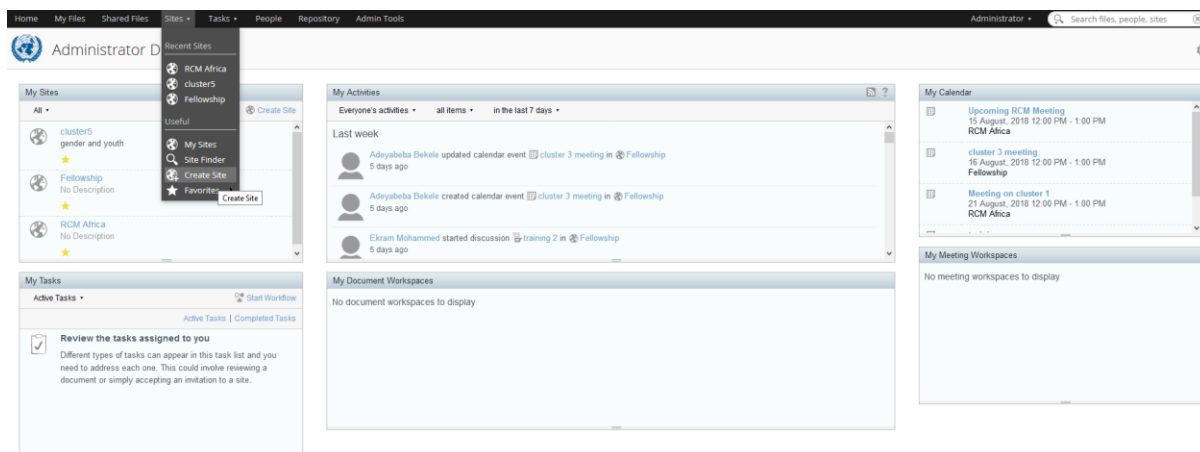


Figure 15: Creating a site

Accessing existing sites

Accessing an existing site is easy. You can search for sites using the Site Finder, the search box on the toolbar, or you might receive an email notification that you've been added to a site. If you see a link to a site anywhere in Extranet Team's Portal Share, just click the link to have a look. You can see all the sites you're a member of by clicking Sites then My Sites on the Extranet Team's Portal toolbar.

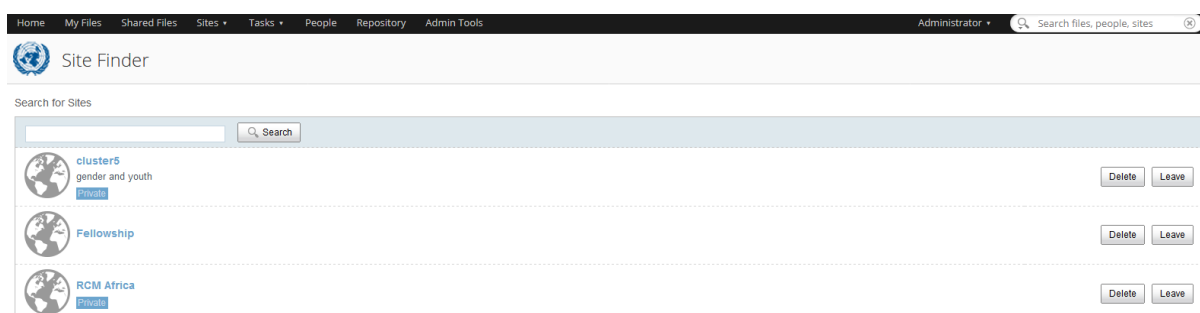


Figure 16 : Managing existing sites

Joining a site

When you join sites, you gain access to the content that's stored on them.

Note: You can see all the sites you're a member of on the My Sites dashlet or by clicking Sites then My Sites on the toolbar.

1. Click Sites to see your Recent Sites and the site tools available.
2. Click Site Finder.
3. Enter a search term and click Search.

Note: You can leave the search field empty to search for all available sites.

All sites meeting your search criteria are now displayed. You have options to:


- Join a public site
- Request to join a moderated public site



- Leave a site that you're a member of
 - Delete a site that you're a manager of
4. Click on a site to go straight to the site dashboard.
 5. Click Sites and you can add or remove the current site from your favourite sites list.

Leaving a site

It's quick and easy to leave a site when you no longer want to be a member.

1. On the dashboard of the site you want to leave, click  then Leave Site.
2. Click OK to confirm that you want to leave the site.

Restriction: All sites require a site manager so if you're the only manager of a site you can't leave it.

Entering a site



You can access a site from several places in Extranet Team's Portal Share. It's easy to get to sites you're a member of from the My Sites dashlet or by clicking Sites then My Sites on the toolbar. If the site you want to access isn't there, you can search for it on the Site Finder page, or in the search box on the toolbar.

1. Click Home.
2. On the My Sites dashlet click the name of the site you want to access.

Moving around a site

The default areas available in a site are the Site Dashboard, Document Library, and the Site Members areas. If a site has additional site features, then you'll also see a more menu. Additional features can be set up by a site manager when they're site. In a site click Document Library, Site Members, or More and select an option from the more menu. The site features you've selected will open; see the links for further details on each of these.

Site dashboard

The site dashboard contains information specific to the current site, and like your user dashboard, site information is organized and displayed in dashlets. The site name is displayed at the top of the screen. The site manager has additional options under the  tools menu and an additional  add users button to set up and manage the site and it's members.

Sites are made up of different features, or pages, which you can find under the more menu. Each new site includes only a library, but a site manager can customize the site to include any combination of pages, including a wiki, a blog, a calendar, a discussion forum, web links, and data lists.

Note: Site managers can **choose a site homepage** other than the dashboard, or remove the dashboard altogether. There's a Site Members link for managing the site membership.

Note: When more features are added to a site you can find this option on the more menu.

A site manager can resize most dashlets by clicking and dragging on the bottom edge of the dashlet until it's the height you want. This is saved between sessions.

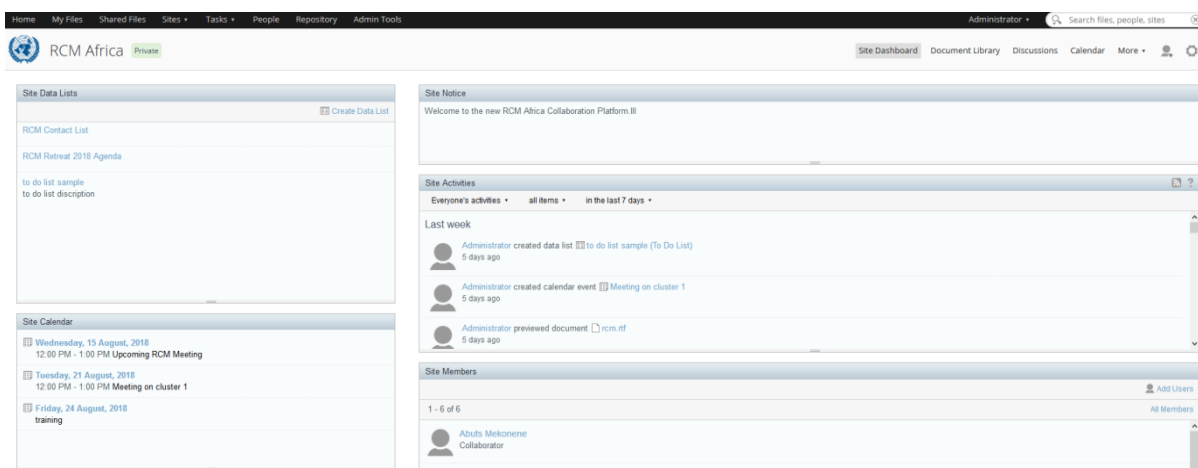



Figure 17 : Site Dashboard

Choosing a site homepage

Site dashboards are the default homepage on all Extranet Team's Portal Share sites. Site managers have the option to remove the site dashboard for individual sites. Whichever page comes first in the Current Site Pages will then become the default homepage for the site. You can also keep the dashboard but reorder the pages so that a different page is the homepage.

1. Enter a site.
2. Click  then Customize Site. The Site Dashboard is shown by default as one of your Current Site Pages.
3. Click Remove to remove it from the site. Alternatively, change the order of the Current Site Pages so that a different page comes first (from left to right). This page will become the site homepage.
4. Click OK to save your changes.

The site displays with it's new homepage. You can always add the site dashboard back later.

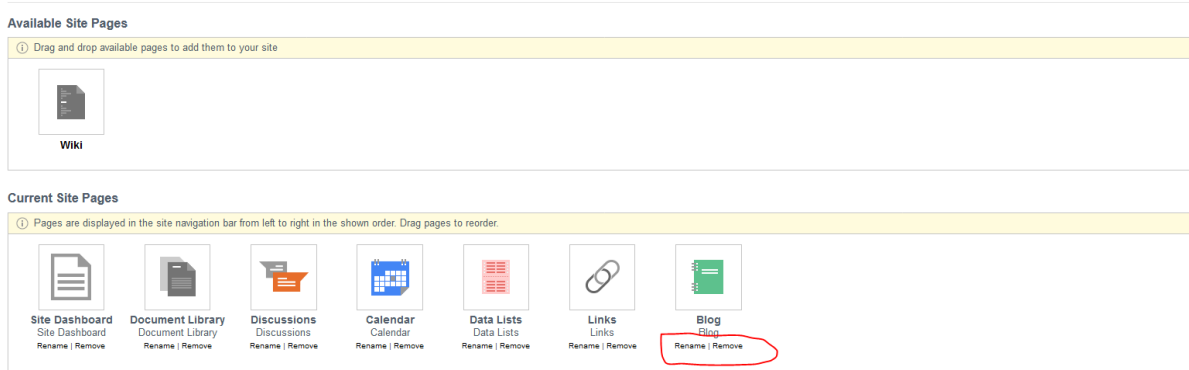


Figure 18 : Adding/Removing dashlets

Managing a site

Creating a site is quick and simple. You can then customize it to build a fully functional project site.

When you create a new site, you are automatically made the manager. This gives you full access to the site features.



Creating a site

You can create a site from anywhere in Extranet Team's Portal Share and are automatically made the manager of the site you create. A site *can* have multiple managers.

1. Open the Sites menu on the toolbar and click Create Site.
2. Enter the site details:
 - Name: The title of the site.
 - URL Name: You'll notice that the URL Name is automatically created but you can edit it if you want.
 - Description: Enter a description that will help users know what the site is for.
3. If you have modules such as Records Management installed, then there will be an additional Type option. Select Collaboration to create a standard site.
4. Select the site visibility:
 - Public: All users can view a public site in their own organization, whether or not they have joined the site. Users who join the site are listed as site members and can work with the site content, depending on their assigned roles.
 - Moderated: The same as a Public site but the site manager must approve a user's request to join.
 - Private: Only available to the site manager and any users added to the site.
5. Click Save.

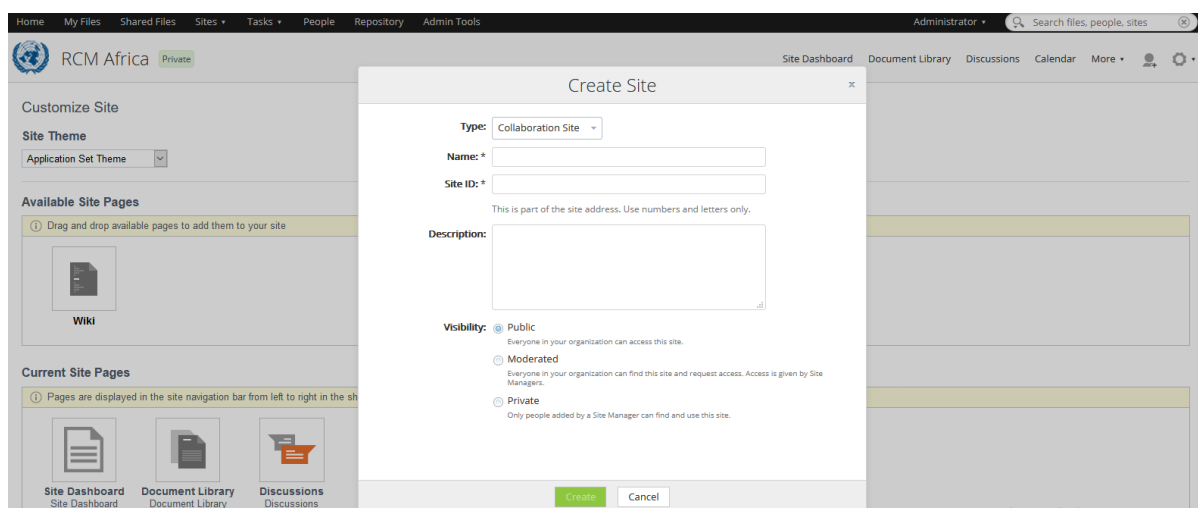


Figure 19 : Creating a Site


You'll see the dashboard for the new site which you can now customize. Sites that you create are automatically added to your Favourites list.

Customizing a site

Once you've created a site you can customize it to add extra features.




Each new site contains a library, and the site manager can add other features, such as a wiki, a blog, and a calendar. These features can be further customized by renaming, and creating a theme or colour scheme. You can also choose a site homepage.

1. Enter a site.
2. Click  then Customize Site.
3. Choose a site theme.
4. Drag and drop pages from the Available Site Pages to the Current Site Pages to add them to the site. You have to move the pages one at a time. You can drag the pages around to reorder them the way you want to see them in the site. The leftmost page will become the site homepage.
5. Click OK to save your changes.

The site dashboard displays the new theme, if one was selected. You can select the new pages by clicking more on the dashboard. With the site customized you can now customize the site dashboard to display information that's relevant to the site.

Customizing the site dashboard

Like your user dashboard, site information is organized and displayed in dashlets. As a site manager you can change the site layout, choose dashlets, and configure the display order.

1. Enter a site.
2. Click  then Customize Dashboard. The Customize Dashboard page displays the current layout and configuration of your dashboard.
3. Change the site dashboard layout:
 - a. Click Change Layout.
 - b. Click the layout you want to use. You can click the image or the Select button beside it.
4. Select the site dashlets:
 - a. Click Add Dashlets.
 - b. Drag and drop dashlets from the Add Dashlets section onto the columns below.
 - c. Drag and drop a dashlet to the garbage can to remove it (or press DELETE).
5. Drag the dashlets within and across columns to organize the display order.
6. Click OK to save the dashboard configuration.


You can resize most dashlets. Drag the bottom edge of the dashlet until it is the height you want.

Editing site details

You can change the name, description, and visibility of a site after it is created. Only a site manager can edit the site details.

1. Enter a site.



2. Click  then Edit Site Details.
3. Change the site details as necessary. You cannot change the site's URL name.
4. Click OK.

Favouriting a site


You can mark a site as a favourite to add it to the Favourites list in the Sites menu. This lets you quickly access the site from anywhere in Extranet Team's Portal Share. You can mark any number of sites this way. While in a site, open the Sites menu on the toolbar and click Add Current Site to Favourites.

Note: If a site is already a favourite you instead have the option to Remove Current Site from Favourites.

The current site now appears in the Favourites list in the Sites menu and the My Sites dashlet.

Deleting a site

Delete a site to move it and all of its content to your Trashcan. Only a site manager can delete a site.

1. Enter a site.
2. Click  then Delete Site.
3. Click OK to confirm the deletion.

The selected site and all its content is deleted. The site member roles are stored in case you want to restore the site. When you empty your Trashcan all site details and content including site member roles are permanently deleted.

Managing site members

Site users can easily see who else is a member of the site, and site managers can edit user roles and remove a user from the site. Enter a site and click Site Members to view or search for members of the site.

Users

Use this page to search for a site member or view a list of all members. A site manager can add users, edit user roles, and remove site members from here.

Groups

Use this page to search for a site group or view a list of all groups. A site manager can add groups to the site, change a group's role, and remove a site group from here.

Pending


Use this page to view users who have been invited to, or requested to join the site. You can cancel invitations here. Only site managers see the Pending page.

Adding users to a site

Site managers can quickly add users to a site.



You can add any user, either internal to your organization or an external user.

1. Click  in the site you want to add users to, or click Add Users in the Site Members dashlet. You can also open the Add Users page directly from the Site Members page.

Important: You must be a site manager to add a user.

2. Enter a search term such as a user name and click Search. You need to enter at least one character. The search is not case sensitive. If you don't see any users then try a different search term and check that your Extranet Team's Portal administrator has created users.
3. Click Select for each user you want to add.
4. Set the site role for each user, or use set all roles to assign the same role to all users. This controls what the user can do in the site. Once you've selected site roles for all the users you've selected, the Add Users button will be switched on.
5. Click Add Users.

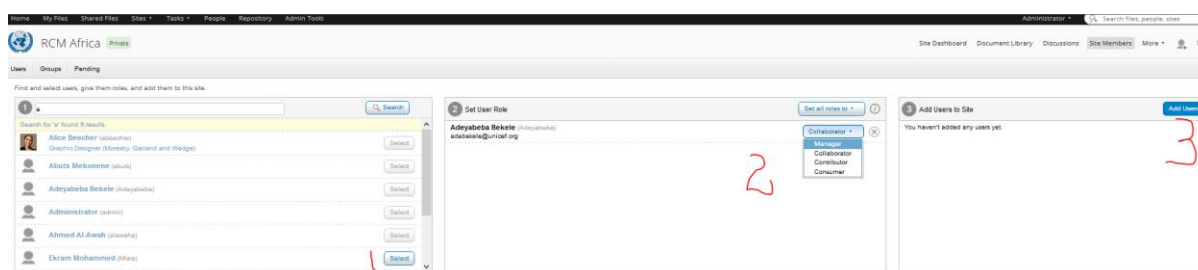


Figure 20 : Adding users to a site

A message displays showing the number of users you've added. All these users receive an email notification and can now use the site. You can continue to add more users as required.

Approving users to join a moderated site

When a user requests to join a moderated site, the request needs to be approved by a site manager. All managers of a site will be receiving an email and be given a new approval task when a request to join the site is made. Any of the managers can complete this task.

1. Click Site Members Then Pending. You'll see a list of pending requests to join the site. You can also click Tasks then My Tasks to get to the approval task or access it direct from the notification email that was sent. You'll also see any Pending Invites. From Extranet Team's Portal One version 5.1 or later, users are added to sites and invites are only sent if your Extranet Team's Portal Administrator has specifically configured this option.
2. Click Approve or click View to view the approval task where you can approve, reject, and comment on the request to join.

The task is cleared from your task list and the user is added to the site.

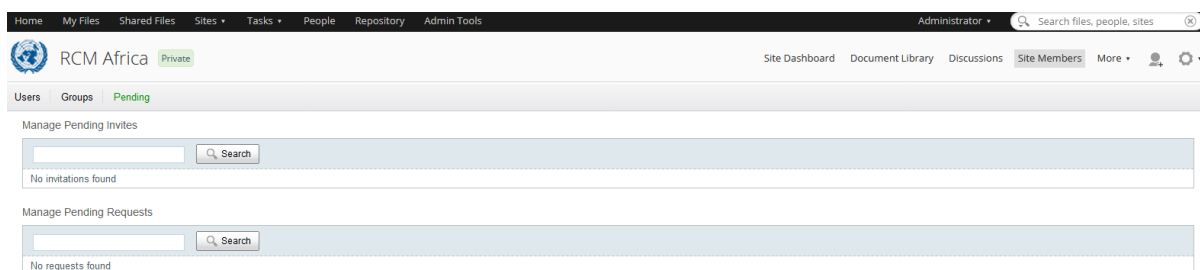



Figure 21 : Managing groups and pending users to a site

Adding groups to a site

Inviting users one at a time to join your site can be time consuming. To save time you can add entire user groups.

1. Click  in the site you want to add groups to or click Add Users in the Site Members dashlet. You can open the Add Users page directly from the Site Members page.
Important: You must be a site manager to add groups.
2. Click Groups and then click Add Groups.
3. Enter a search term such as a group name and click Search. You need to enter at least one character. The search is not case sensitive.
4. Click Add for each group you want to add.
5. Set the site role for each group, or use set all roles to assign the same role to all groups. This controls what the group's users can do in the site. Once you've selected site roles for all the groups you've selected, the Add Groups button will be switched on.
6. Click Add Groups to add the groups listed.

A message displays showing the number of groups you've added. All these groups can now use the site. You can continue to add more groups as required.

Reviewing the site members

Use the search feature to find a particular site member. You can also list all site members.

1. In a site click Site Members, or More then Site Members if the site has additional features. You can also click Groups to view groups that are members of the site.
2. Type the full or partial name of a user. Leave the search box empty to display all site members.
3. Click Search.

Reviewing site groups

Use the search feature to find a particular site member. You can also list all site members.

1. In a site click Site Members, or More then Site Members if the site has additional features.
2. Click Groups.
3. Type the full or partial name of a site group. Leave the search box empty to display all site members.
4. Click Search.





Changing a site role

A site manager can amend a member or group role to change what they can do in a site.

1. In a site click Site Members, or More then Site Members if the site has additional features.
2. Select Users or Groups in the Members component.
3. Search for the site member or group whose role you want to change. Type a full or partial name or leave the search box empty to display all members or groups. The results list includes the assigned role.
4. Click the current role and select a new role from the list.

Becoming a site manager

If your account is an administrator account, then you can make yourself a site manager of any site that you're a member of. Users who aren't an Extranet Team's Portal administrator don't have this option. They need to request a role change from an existing site manager. In a site click  then Become Site Manager. You are now a manager of the site. You'll see that you have additional options available when you click .

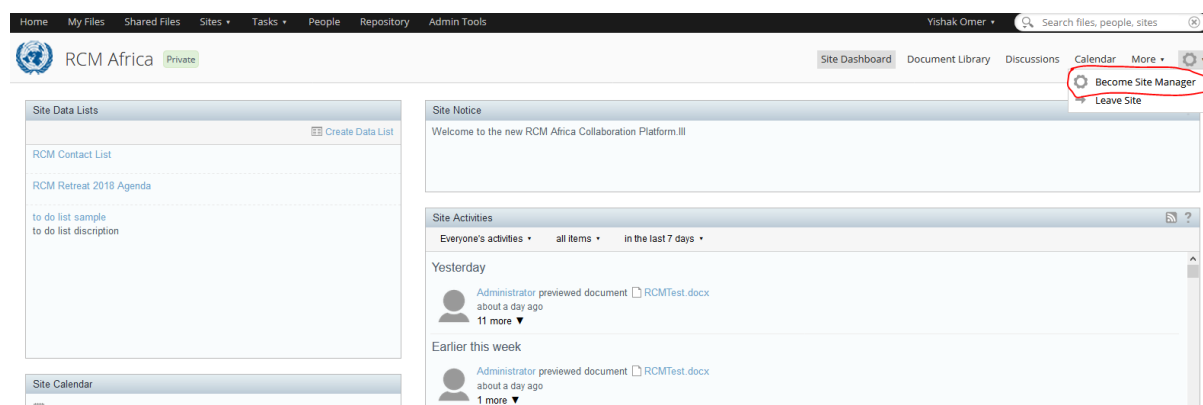


Figure 22 : Becoming a site manager

Removing a site member or site group

When you remove members or groups from a site they can no longer access it, but if the site is public they can re-join it. Only a site manager can remove members from a site.

1. In a site click Site Members, or More then Site Members if the site has additional features.
2. Select Users or Groups.
3. Search for the site member or group you want to remove. Type a full or partial name or leave the search box empty to display all members or groups.
4. Click Remove.

Content


A site document library is where you store and manage content, such as documents, images, and videos. You can upload content to share and work on with other site members. Users can view and work on this content, depending upon their permission settings.



Document library activities appear in the Site Content dashlet, so you can see at a glance the content that's been added and updated. You can also store content in the My Files and Shared Files areas and in the Repository, see [Working with content outside the library](#) for more.

The Document Library

Access the site Document Library to view and work with the content in the current site.

1. In a site click Document Library to access the library. In each site the component names can be customized. If the site manager has done this, the link in the navigation bar might have a label other than Document Library. The item list takes up most of the library main page. You can filter the item list and navigate the library using the explorer panel on the left side of the page.
2. By default, items are shown in the Detailed View. Click Options to select a different view, see [Library Options](#) for more details. In the Options menu you can also show and hide folders, switch to full screen view, and set up an RSS feed.
3. Use the sort menu at the top of the list to change the criteria used to sort the items and click the  icon to toggle between ascending and descending sort order. The view options you select (library view, sort order, hide/show folder selection) are specific to your user account. These settings are carried over from the current site to all other sites that you view. They are saved between sessions and remain the preferred view until you change it.
4. In the list views position your cursor over a piece of content item to display the available actions. This also displays the version number, which is set to 1.0 when a new item is uploaded to the library. If you're using a Mac then it might seem that not all of the actions are available. This is because with a Mac sometimes the scrollbars are hidden. To display the scrollbars, go **System Preferences > General** and select to always show scroll bars.

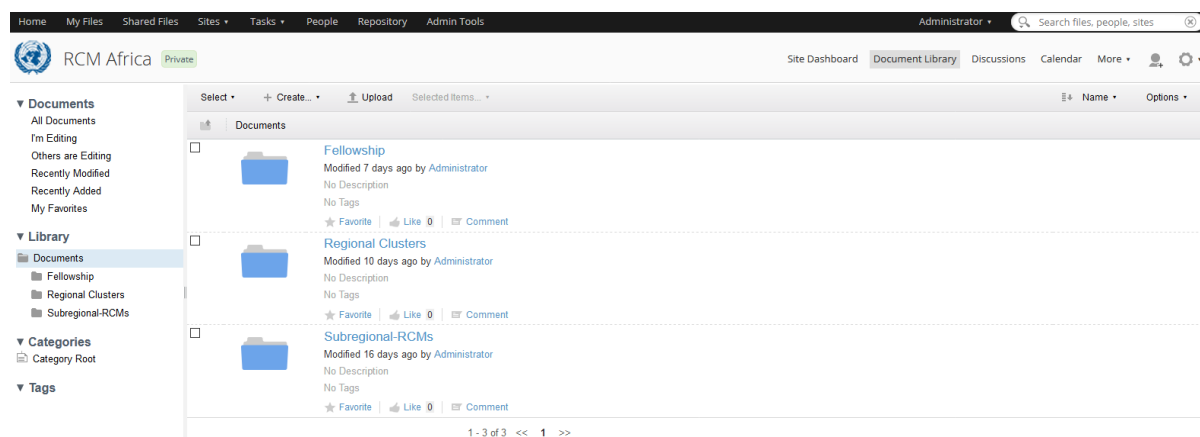


Figure 23 : Documents Library

Exploring the library

You can filter which items you see in the library using the explorer panel on the left side of the library. This can help you to locate specific items in the library. The **Documents** list in the explorer panel provides the following views:

All Documents

Displays all files in the library



I'm editing

Displays the files you currently have checked out

Others are editing

Displays the files checked out by other site members

Recently Modified

Displays files modified in the past seven days

Recently Added

Displays files added to the library in the past seven days

My Favourites


Displays the files you have marked as favourites

Synced Content

Displays the files that have been synchronized with an Extranet Team's Portal Share in the Cloud site

Synced with Errors


Displays the files that have been synchronized with an Extranet Team's Portal Share in the Cloud site, but have errors in the synchronization

The **Library** section displays the folder structure in a tree view. The symbol  indicates a library folder contains subfolders. Click on a folder to expand or collapse it.

The **Categories** tree lets you filter the library contents by category. Click a category to expand the branch; click it again to collapse it.

The **Tags** list displays the tags currently associated with one or more files. The number following the tag tells you how many files have that tag. When you filter content using **Tags** view, items have additional **Locate File** and **Locate Folder** actions to show the actual location of content in the library tree.

The *breadcrumb path* above the file list displays your current position in the tree. Each breadcrumb item is a link, so you can easily return to any part of the current navigation path. You can:

- Click a link to return to the corresponding folder.
- Click  to display the contents of the folder one level higher.
- Click **Options** Then **Hide Breadcrumb** / **Show Breadcrumb** to hide/show the breadcrumb path.

For each piece of content (folders and files) you view in the **Document Library** you can:

- Click the name of a file to display the file preview screen for that files.
- Click the name of a folder to view its contents. You can see your current location in the breadcrumb path.

All files and folders have multiple options that are displayed when you hover over them.



Library view options

The **Options** menu in the **Document Library** lets you customize how you view content. The default view for the library is **Detailed View**. This view displays the basic details for each file or folder as well as a thumbnail, description, tags, and social features (Favourite, Like, Comment, and Share). **Simple View** just displays the basic details. You can use the other view options to get a more visual representation of site content, or to view content in a more basic table format.

At the bottom of the **Options** menu you can click to **Set** or **Remove** the current view as the default view for the folder you're in. In all viewing options, just click an file name to open the file preview screen. Click a folder name to open that folder so you can view its contents.


With **Media View** and **Audio View** you'll see extra file information. If you select one of the more visually rich views, the way you interact with content changes slightly. Here are some useful features you'll find in these views.

Resize the thumbnails



Use the resizing bar to make the thumbnails larger and smaller. This lets you choose how much detail you see in the main view, so you can either quickly scan many smaller images or preview larger ones without needing to view the details page.

Display the information panel

Click the  Information icon to display content details and available actions.

Select content

Click the check box on an item or folder to select it. In **Gallery View** you can select multiple items, in **Filmstrip View** just one.

In the **Options** menu you can also show and hide folders or the breadcrumb trail, switch to full screen or full window view

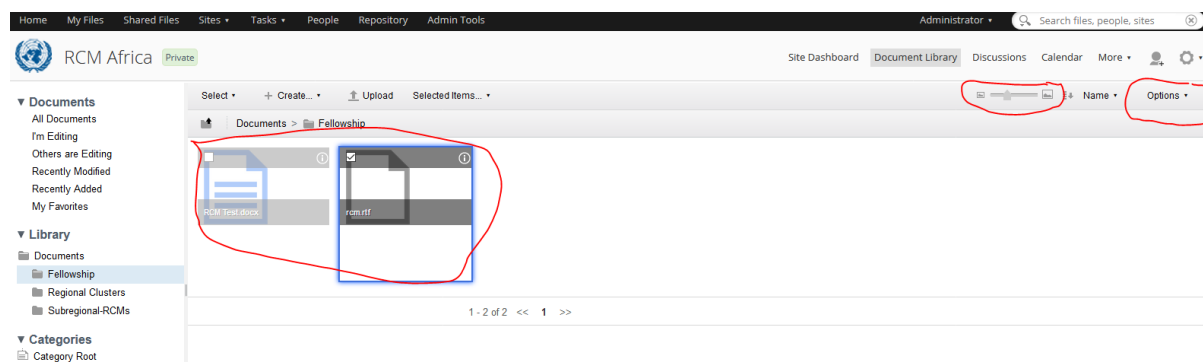


Figure 24 : Managing preferences in documents library

Adding content

You build up site content by creating an organized folder structure then adding content to it.



There are two ways to add content to Extranet Team's Portal Share: create new content or upload existing content from your computer.

There are different options available depending on whether you're adding files or adding folders.

- Adding folders
- Adding files

Adding folders

You can add folders from outside Extranet Team's Portal Share and create new folders within a site. There are three ways to add folders:

- Click Create in the Document Library
- Drag and drop folders from your computer
- Create folders from templates

Creating folders

The **Library** section of the explorer panel shows the folder structure for the current site. A new site contains just one folder named Documents. Add new folders here.

1. Choose where you want to add a folder, either by using the explorer panel or by clicking through folders in the file list.
2. Click **Create** then **Folder**.
3. Enter a name for the folder. The folder name does not support the following special characters: * " < > \ / . ? : and |. When the name contains a disallowed character the **Save** button is disabled. The folder name *can* include a period as long as it is not the last character.
4. Add a title and description for the folder.
5. Click **Save**.

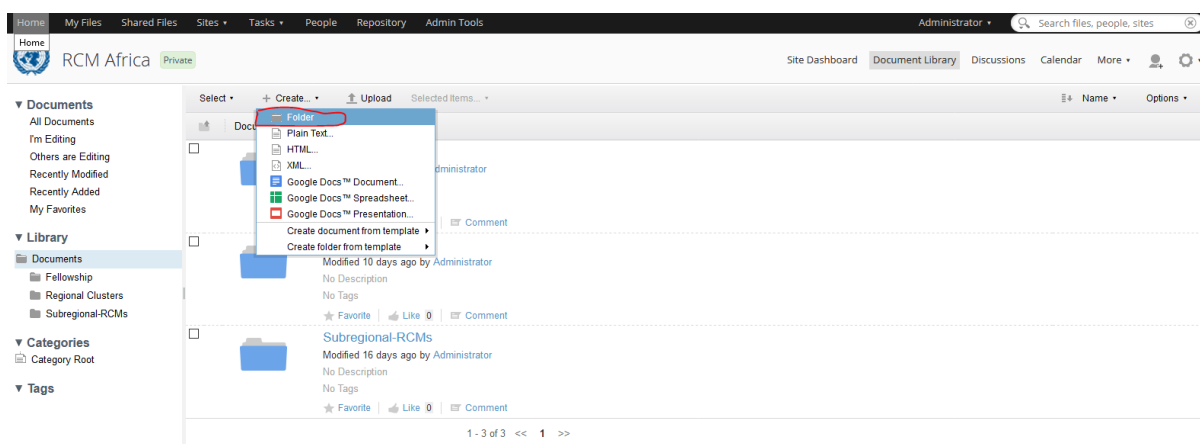


Figure 25 : Creating a new folder and document types

Drag and drop folders

You can drag and drop folders straight from your computer into Extranet Team's Portal Share.



Note: Internet Explorer 11 and Microsoft Edge do not support drag and drop functionality. We recommend using with Google Chrome or Firefox. When you drop a folder, subfolders, or files, the dropped folder will also be added. This means that you can add whole sets of files and folders and maintain their structure. If empty folders exist in the folder structure, then they'll also be created when you upload.

1. Choose where you want to add a folder, either by using the explorer panel or by clicking through folders in the file list.
2. Click on the folder in Windows Explorer, Apple Finder, or on your desktop. Hold down the mouse button while you drag the folder then let it go to drop the folder.

You can drag and drop folders into the current level or directly onto another folder. An arrow will be displayed when the files are correctly positioned over a folder to be dropped. You can't drag and drop content directly into folders in Table, Audio, or Media views. You can't upload folders whose names contain the following special characters: * " < > \ / . ? : and |.


Adding files

You can add both existing files from outside Extranet Team's Portal Share and create new files within a site. Use the **Upload** option to upload existing files from your computer into the library. You can also drag and drop one or more files to the library view - even to a particular folder.


In **Detailed View** you can drag and drop files into the current library level or directly onto a folder. An arrow will be displayed when the files are correctly positioned over the folder to be dropped. In all other views you can drop files into the current library level only. So if you want to drop them into a specific folder, that folder needs to be open in the library view.

The **Create** menu provides options for creating different kinds of content directly in the library: plain text, HTML, and XML documents, as well as three types of Google Docs content (documents, spreadsheets, presentations). You can also create content from a template.

Uploading files

Adding files from your computer to Extranet Team's Portal Share is simple. You can upload a single file or several files at a time. You can upload files in two ways: drag and drop files from your computer directly into the library, or click  **Upload**. When you drag and drop a blue outline highlights the selected drop point.

You can drag and drop files into the current library level or directly onto a folder. An arrow will be displayed when the files are correctly positioned over the folder to be dropped. You can't drag and drop content directly into folders in Table, Audio, or Media views.

1. Select the folder in the document library where you want to add your content. When you select a folder in the explorer panel the item list displays the current contents of that folder. When using the **Upload** action the file(s) you select will be added here.
2. Click  **Upload**.
3. Click **Select files to upload** on the **Upload Files** dialog box.
4. Find and select the files that you want to upload from your computer. The document library displays the uploaded content.

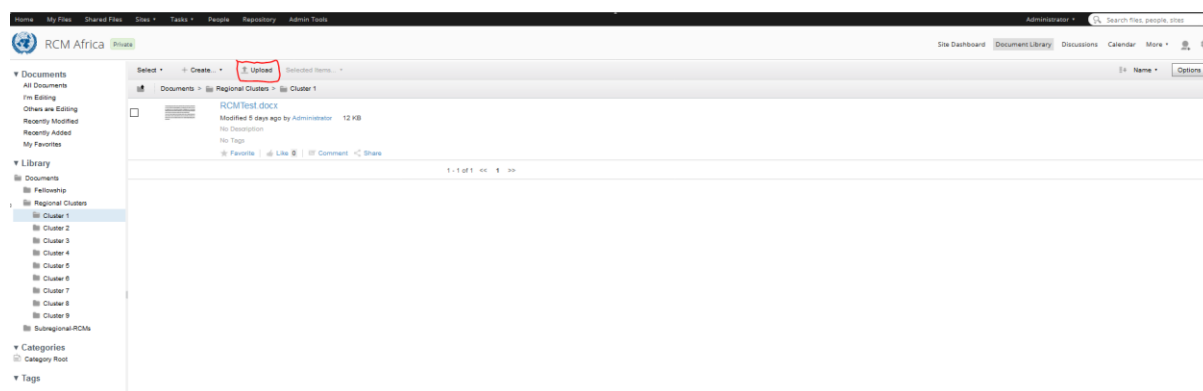


Figure 26 : Uploading a document

Creating files

With the **Create** feature you can create plain text, HTML, and XML files directly in Extranet Team's Portal Share. You can also **create Google Docs content** and **create content from templates**.


1. Select the folder where you want to add the content. The file list displays the current contents of the selected folder. The content you create will be added here.
2. Click **Create** and then select the type of file you want to create. To create content from a template, click **Create document from template** and select from the list of templates made available by your administrator. A new file with the same name as the template is created. You can rename the new file and edit the default content. No other steps in this task are required.
3. Enter a **Name** for the content. The **Name** does not support the following special characters: * " < > \ / . ? : and |. When the name contains a disallowed character the **Create** button is disabled. The name *can* include a period as long as it is not the last character. This allows you to add an extension (for example, .txt, .html, or .xml) if you want, though it's not required.
4. Add a title and description for the file.
5. Add the file content in the **Content** box. For HTML documents you can use the additional formatting options, and for XML documents you can include any required XML tagging. For HTML documents you can also drag the bottom right corner to resize the text editor.
6. Click **Create**.

The file is saved to Extranet Team's Portal Share and displayed in the file preview screen.



Creating Google Docs files

You can easily create Google Docs documents, spreadsheets, and presentations from Extranet Team's Portal Share. Files you edit are temporarily stored in Google Docs, then removed from Google Docs once they've been checked back in to Share.

1. Select the folder where you want to add the content. The file list displays the current contents of the selected folder. The content you create will be added here. You can create new folders as necessary.
2. Click **Create** and select the type of Google Docs file you want to create. The first time you access Google Docs you have to authorize Share to use your account. If you have a Google Username in your Extranet Team's Portal Share profile then it will be used as the default account. After responding to the prompts a message lets you know that the authorization was successful. Share stores your Google Docs account information. You will need to authorize Share each session, but you won't have to re-enter your credentials each time. If your browser asks you to allow popups for Google Docs then go ahead and do so. If you're using Safari you won't be able to use Google Docs until you enable all popups in the settings, so for security reasons you may prefer to use a different browser. Google Docs opens with standard Google Docs functionality available, including the menu, the toolbar, and the features to add comments and share.
3. Click the default title to rename the file. On the **Rename Document** dialog box, enter a name and click **OK**. You can also rename the file in the Share.
4. Create your content. The file is saved to Google Docs, and locked in Extranet Team's Portal until you check it in.
5. When you're done, close the Google Docs browser tab. In Share you'll see the file displays the  icon to show that it's open in Google Docs.
6. In Share, click **more** then **Check In Google Doc**.




Viewing content

To get a closer look at a file or folder without downloading it, you can view it on the file preview screen. This gives you more detail, a preview, and access to social features, actions, and version history.

Viewing folder details

View the details page for a folder to conveniently see all information and actions in one place.

1. Hover over a folder in the file list in the document library. Make sure you haven't selected **Hide Folders** in the Options menu.
2. Click  **View Details**.

The Folder Details page displays all folder information, including properties and permissions. This page includes social features and folder actions. Click the folder in the breadcrumb trail at the top of the screen to return to the item list for that folder.

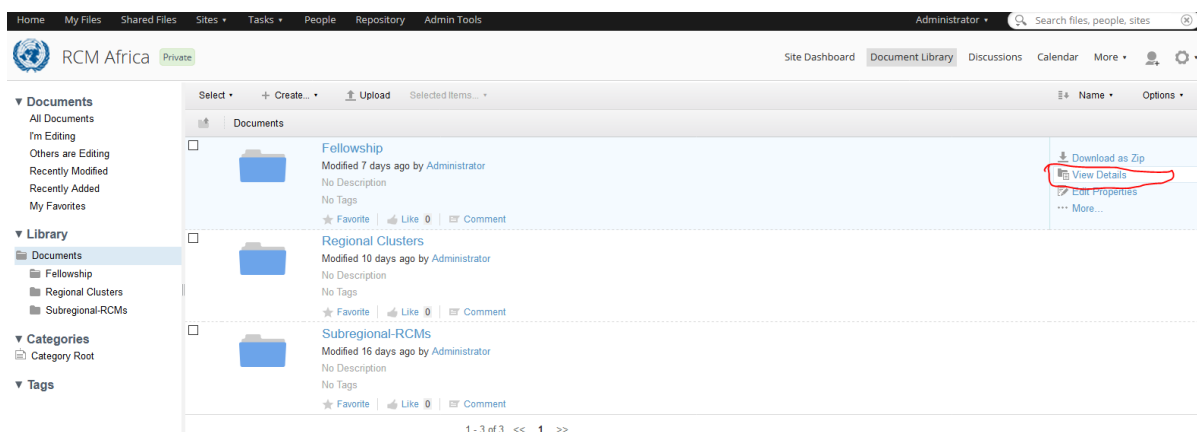


Figure 27: Viewing details of files and folders



Viewing a file

You can preview files by clicking on the thumbnail or name in the document library. All file details and actions are available on this one screen. The preview screen is split into four sections:

- Info and options
- Preview
- Comments
- Actions and details list

Info and options

The info includes the file location and name, version number, the user who last modified the file, and the date/time of the modification. An icon to the left of these shows the file type. Above this info is a link to return to the document library. With the options you can:

- Click  to download a file.
- Click  to like a file. You can click it again to unlike it.



- Click ★ to favourite a file. You can click it again to unfavourite it.
- Click 💬 to comment on a file. When you've entered your comment click **Add Comment**.
- Click ➦ to share a file. You can copy a link or share it directly on social media.

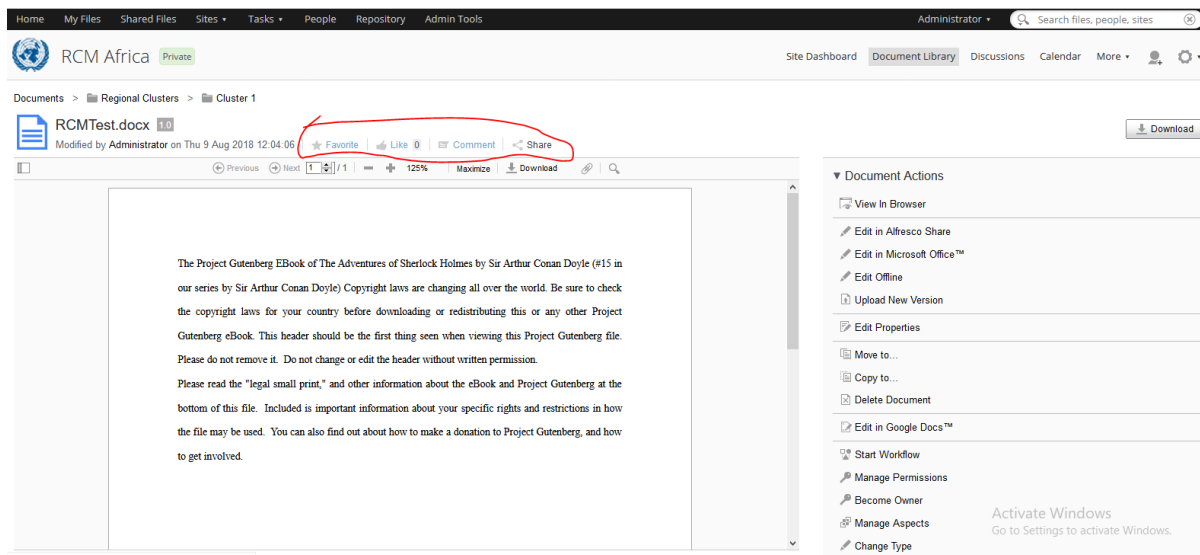


Figure 28 : Like, favourite, Share and comment links for files

Viewing a file in a browser

While the preview feature lets you view a file in Extranet Team's Portal Share, you also have the option of viewing it in your default browser.

1. Hover over a file in the document library.
2. Click **View in Browser**.

A new browser window opens displaying the selected file. For some file types, such as Microsoft Office documents, Share launches the file in its associated program.

Working with files and folders

Once files are added to a site, site members can access and work with them. In addition to adding more files, members can view, download, edit, and delete files.

Editing files

There are multiple ways to edit content. These options are available whenever suitable for a file type. The **Edit Offline** action lets you download a file to your computer, so you can edit it there. This locks the file in the library to prevent others from editing it simultaneously. It's available for every file.

The **Edit in Microsoft Office** action lets you edit a file in the appropriate MS Office program. The file is locked in Extranet Team's Portal Share while it's being edited. It's available only for Microsoft Office 2003 or later files.



The **Edit in Extranet Team's Portal Share** action lets you edit plain text, HTML, or XML files directly in the document library. It's available for these file types, which can all be created with the **Create** feature in the library.

The **Edit in Google Docs** action lets you work with files in Google Docs. The file is locked in Extranet Team's Portal Share while it's being edited. It's available for supported document, presentation, and spreadsheet formats.

You can also edit the properties of a file, or upload content as a new version of an existing file.

Editing files offline

When you edit a file offline it's downloaded to your computer and locked in the library, so that other users can't overwrite it while you make changes offline.

1. Hover over a file and click **More** then **Edit Offline**. The prompts that follow vary between browsers.
2. Follow the prompts. When asked to open or save the file, save it to your computer. Depending on your browser settings, the file might be saved automatically to a default location on your computer. The file is added to the **I'm Editing** view (on the left side of the library). The original file is still in its original location in the library. An icon indicates to users that the file is locked by you for editing.
3. Now you can open and edit the version you've downloaded.
4. When you're done, click **Upload New Version** to upload the edited version to Extranet Team's Portal Share.

You can click **Cancel Editing** to unlock the file without making changes.

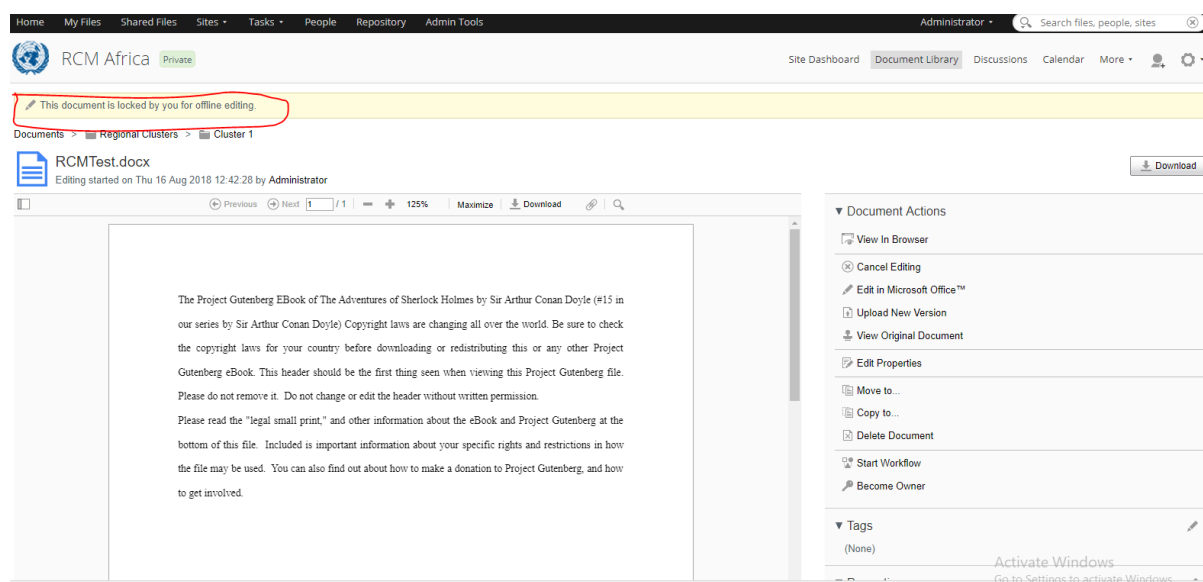


Figure 29 : Offline document editing and locking

Editing files in Microsoft Office

You can edit Microsoft Office files directly from Extranet Team's Portal Share. When you're editing a file, it's locked in Share until you finish editing it.



If you're working on a Mac then make sure you've updated to the latest minor version number of Microsoft Office. If you have an older version installed, then you might have problems opening documents.

1. Hover over a file and click **More** then **Edit in Microsoft Office**. A message asks you to make sure you can trust the content. The file opens in a separate window. In Share the file will be shown as locked. You might get a further request to enter your Share login details and **Enable Editing**.
2. You can now edit the file. The minor version number in Share is updated each time you save the file. All standard Microsoft Office functionality is available.
3. When you're done, save and close the file.


If **Edit in Microsoft Office** isn't available, then check that:

- You have the site permission to edit the file. Consumers can only view a file.

Editing files in Google Docs

The **Edit in Google Docs** action is available for any file that can be edited in Google Docs. Common document, presentation, and spreadsheet formats are supported.

Files you edit are temporarily stored in Google Docs, then removed from Google Docs once they've been checked back in to Extranet Team's Portal Share.

1. Hover over file and click **More** then **Edit in Google Docs**. If prompted, authorize Share to access your Google Docs account. If you have a Google Username in your Extranet Team's Portal Share profile, then it will be used as the default account. If you previously locked the file for editing and are returning to it, you'll have the action **Resume Editing in Google Docs**. The file opens in Google Docs in a new browser tab. It's locked in Share so that other users can't edit it while you're working on it. The file stays locked until you either discard or save your changes.
2. Edit the content.
3. When you're done, close the Google Docs browser tab. In Extranet Team's Portal Share you'll see the file displays the  icon to show that it's open in Google Docs.
4. In Extranet Team's Portal Share, click **More** then **Check In Google Doc**. You can also select **Resume Editing in Google Docs** to carry on editing and **Cancel Editing in Google Docs** to discard the editing session and any changes made.
5. On the **Version Information** dialog box, indicate if the revision is major or minor, then add any information that might be relevant to the updates you made.
6. Click **OK**.

Editing file and folder properties




Edit the basic details of a folder or file to change its name, description, and tags.



Note: If the selected folder or file has the *Classifiable* aspect applied, there will be an additional **Categories** option available.

1. Hover over a file or folder and click **Edit Properties**. The **Edit Properties** dialog box displays the basic metadata for the item. The **All Properties** link in the upper right corner will display the full set of properties available for the item.
2. Edit the details. The **Name** doesn't support the following special characters: * " < > \ / ? : and |. The name can include a period as long as it is not the last character.
3. Click **Select** beneath the **Tags** label to edit the tag associations. You can add and remove existing tags, and create new tags.

On the **Select** page the left column lists the tags being used in this network. The right column displays the tags already associated with the folder or item.

- a. **Create a new tag:** Type the tag name and click the  Create new item icon (or press ENTER). Create one tag at a time. The tag can be a single word or a string of words.
- b. **Add an existing tag:** Find a tag in the left column and click the  Add icon to associate it with the current folder or item.
- c. **Remove an existing tag:** Find a tag in the right column and click the  Remove icon.
- d. Click **OK** to save the changes.

You can add, edit, and delete tags by hovering over existing tags or the **No Tags** description in the document library.

4. Click **Save**.

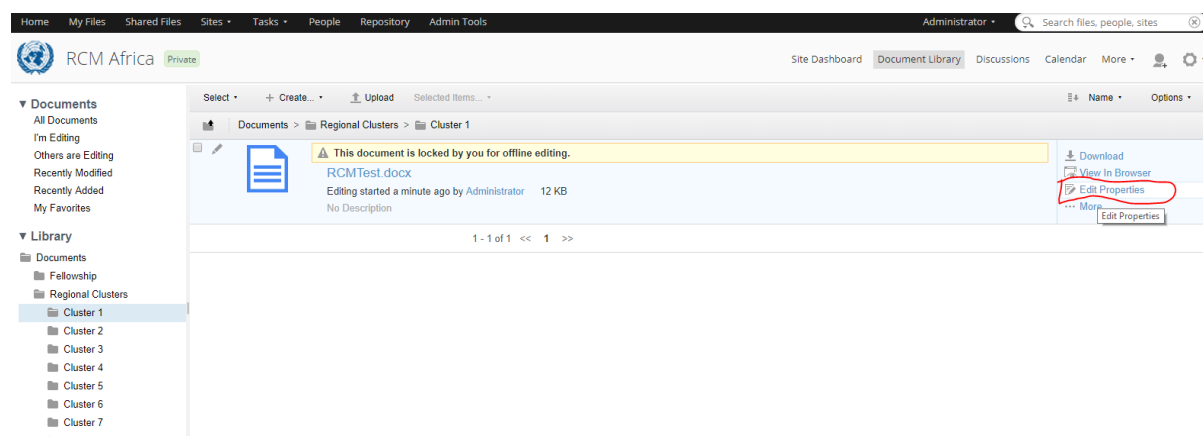


Figure 30 : Editing File properties

Uploading new versions

You can upload content from your computer to update a file. Doing this to a file you've locked updates the content and removes the lock at the same time. You can also do this to an unlocked file to update it without first downloading it to your computer.



1. Find the file you want to update. The **I'm Editing** view shows the files locked by you for editing.
2. Hover over the file and click **More** then **Upload New Version**.
3. Click **Select files to upload** on the **Update File** dialog box.
4. Find and select the file that you want to upload from your computer. If you select a file with a different name or file type then this will be shown. You can continue as in the next step, cancel, or select a different file to upload. If you continue then the uploaded file name and/or file type will be used.
5. Indicate if the revision is minor or major.
6. In the **Comments** box, add any information that is relevant to the update.
7. Click **Upload**.
8. When the progress bar shows that the upload is complete, click **OK**.

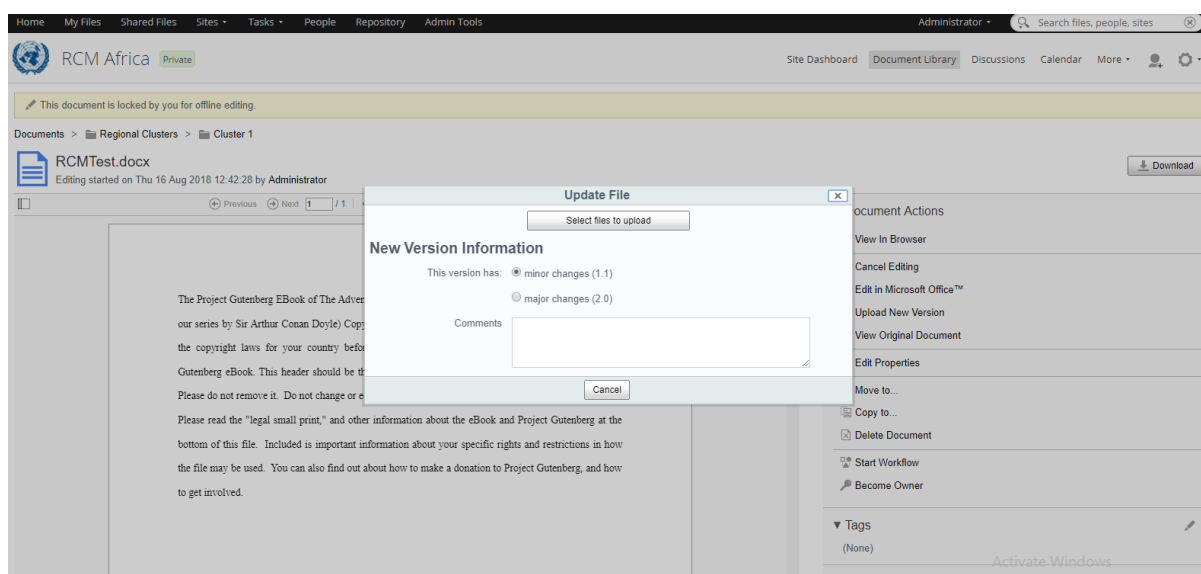


Figure 31 : Uploading a new version of a document

Downloading files


You can quickly download files from Extranet Team's Portal Share so that you have a local copy. When you select a locked file you're actually downloading the last version that was added to Share, which might be out of date. The user who locked it for editing might have a more recent version of it outside Share.


1. Hover over a file/folder and click **Download / Download as Zip**. You are prompted to open or save the file. Depending on your browser settings, the file might be saved automatically to a default location on your computer.
2. Save the file to your computer.




Sharing files

You can easily share an file - even with people who don't have an Extranet Team's Portal Share account. Clicking the **Share** action generates a URL that you can send by email or publish using social networking websites.

People with access to the URL can view the file. Those with an Share account have the option of signing in; those without an account can create one. This option is available in the Document Library Detailed view and on the file preview screen. In the Document Library graphical views click  to see the option.

1. In the **Document Library** find the file you want to share. You can only share files, not folders.
2. Click  **Share**. A window appears displaying the URL for this file. The **View** action lets you preview the file to ensure it is the content you want to share.
3. Click the icon that represents how you want to share the link. You can also copy the link and paste it wherever you like, such as an email or document. When you select a sharing option, a page relevant to your selection displays.
4. Complete the details on the page provided and share the link.
 - Email: The email subject and body are pre-populated for you. Add a recipient and edit the message as necessary, then send.
 - Facebook: Write a comment to post with the link and select how you want to share it. Click **Share Link**.
 - Twitter: Edit the message as necessary and click **Tweet**.
 - Google+: Write a comment to post with the link and specify who you want to share it with. Click **Share**.

If the file is a Microsoft Office, PDF, or other text-based file type (not an image or video) then you can also click  on the file preview to share a link to the item, and even select to **Link to current page**.

Cancelling a shared link

When you don't want your publicly shared file to be available anymore, you can break the link. Once you make the link invalid, anyone who tries to access it will be unable to reach the public page.

1. Find the file you previously shared.
2. Click **Shared**. The window displaying the item's URL appears.
3. Click **Unshared**.

Managing file and folder permissions

You can override the default site permissions for any content you add to the document library. This lets you control what site members can see and do with your content.



Each user has an assigned role in the site - Manager, Collaborator, Contributor, or Consumer - and each role has a default set of permissions. This controls the actions site members can **perform in the site**.

The Manage Permissions feature goes beyond the site permissions. It lets you override a user's site role for a particular content item or folder. This means you can give a site member either more or less access to specific content compared to what they can do with other content in the library.

This can be really useful to hide and restrict content to only a set group of site members. Remember to keep your content secure. If you give someone access to a file or folder then they'll see the breadcrumb path to it, even when they don't have access to its parent folder.

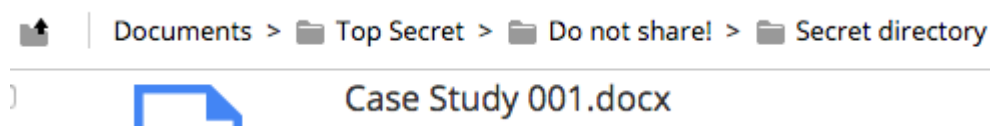


Figure 32 : File and folder permission

CAUTION:

Don't give permissions to users who aren't a member of the site, as this can cause problems with the document library.

1. Hover over a file/folder in the library and click **More** then **Manage Permissions**.
2. Manage the inherited permissions:
 - **Inherit Permissions** shows that permissions are being inherited from the parent folder. Click this button to ignore the inherited permissions.
 - **Inherit Permissions** shows that permissions are not being inherited from the parent folder. Click this button to inherit the permissions.
3. Manage the local permissions:
 - a) Click **Add User**.
 - b) Search for the user you want to define permissions for.
 - c) Click **Search** or press ENTER. The search returns a list of users.
 - d) Click **Add** to place a user in the Locally Set Permissions table. The user is given the role Consumer.
 - e) Change the role as needed.
 - f) Repeat this step to add more users and set their permissions for the same content. To revoke the permissions for a user, click **Delete** in the Actions column.
4. Click **Save**.

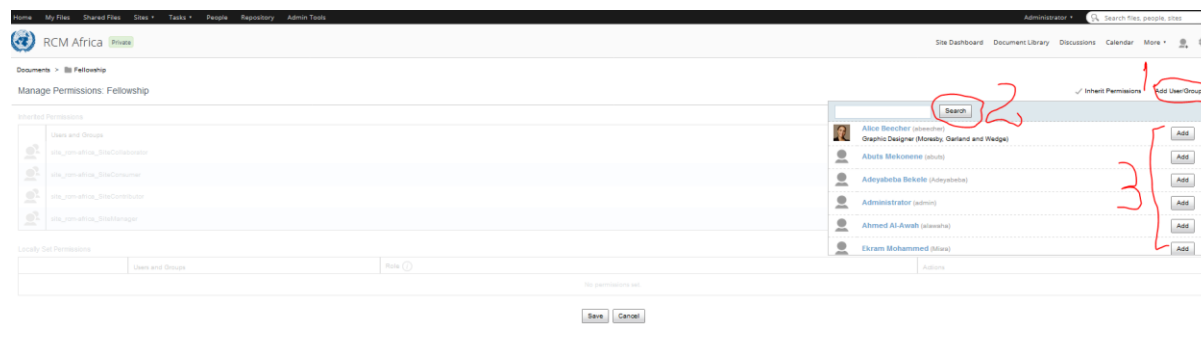


Figure 33 : Managing user group permission

Becoming content owner

You can take ownership of files and folders from other users. You may need to do this if someone who owned a file or folder has left your company and you need to take responsibility for it. You need to be a Site Manager or have permission to delete a file or folder to become its owner, see User roles and permissions.

1. Click on a file to open the file preview. If you're taking ownership of a folder you need to hover over it then select View Details.
2. Click Become Owner and select OK.

You now have full ownership rights of the file / folder.

Organizing content

With different people creating folders and adding files, you want to keep on top of it. Extranet Team's Portal Share has multiple features available to help you keep content labelled, organized, and filed correctly.

Dragging and dropping content

The drag and drop functionality lets you easily move content around the library. You can't drag and drop content in Table, Audio, or Media views.

1. In the library click the thumbnail of the file or folder you want to move. Don't release the mouse button. When you move a folder, all of its content moves with it.
2. Drag the content to its new location. This can be a folder in the explorer panel or breadcrumb path, or onto another folder in the library. The target folder must be visible before you do the move. When you are positioned over the folder it is highlighted. The target folder appears highlighted in the tree or the breadcrumb path.
3. Release the mouse button to move the content.


Important: To move several files or folders at once, or to move content to another site library, use the **Move to** action.

To upload a new version of an existing file you need to use the **Upload New Version** option. If you drag and drop a file that has the same name as a file already in the drop location, it'll be added as a new file with "-1" appended to the file name.



Moving content


You can move content to relocate it to another location within the current library or to a library in a different site.

1. Hover over a file/folder in the library and click **More** Then **Move to**. When you move a folder, all of its content moves with it.
2. Hover over a file/folder and click **More** Then **Move to**. When you move a folder, all of its content moves with it. In some views you'll need to click the  information icon.
3. Choose the site and folder where you want to place the content. You can only move content to sites that you have permission to access.
4. Click **Move**.

You can move multiple files/folders at once by selecting them and using the **Move to** option on the **Selected Items** menu.


Copying content


You can copy content between locations, within a site or across different sites.

1. Find the file or folder you want to copy. When you copy a folder, you also copy its contents.
2. Hover over a file/folder and click **Copy to**. In some views you'll need to click the  information icon. You're copying only the current version. The version history and comments are not carried over with the content.
3. Choose the site and folder where you want to place a copy of the content. You can only copy content to sites that you have permission to access.
4. Click **Copy**.

A copy of the content is created. This is considered a new file so appears as version 1.0, with you as the creator. You can move multiple items at once by selecting them and using the **Move to** option on the **Selected Items** menu.

Favouriting content

Use the **Favourite** action to mark library content that you access often. This adds the file or folder to the My Favourites view in the explorer panel where you can easily find it. You can favourite both file and folders. In some views this option isn't available, or you'll need to click the  information icon.

1. In the library find the content you want to favourite.
2. Click  **Favourite**.


You'll see the icon change. Click the **Favourite** icon again if you want to remove the content from your list of favourites.



Locate items and folders

When you filter library, content using one of the **Documents** or **Tags** explorer views, it is not possible to tell where a file or folder is within the library folder structure. The **Locate File** and **Locate Folder** actions reveal the actual location of a file or folder in the library.

This option is only available if a **Documents** view (All Documents, I'm Editing, Others are Editing, Recently Modified, Recently Added, or My Favourites) or **Tag** view is selected in the explorer pane.

1. Hover the cursor over a file or folder to display the available actions. In some views you'll need to click the  information icon.
2. Depending on the type of content you have selected, click **Locate File** or **Locate Folder**. The view updates to show the file/folder in its library location.

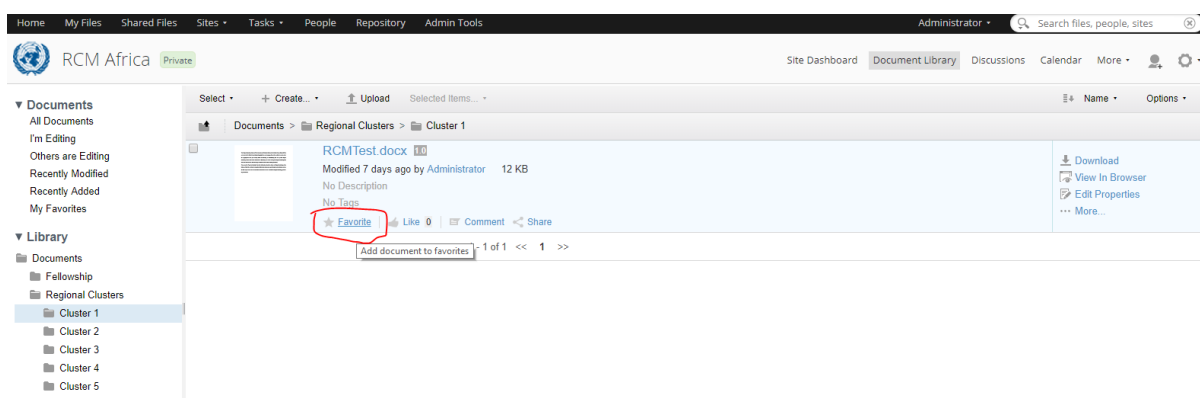



Figure 34 : Favouriting a document

Deleting content

Delete content to remove it from a site library.

1. Hover over a file/folder in the library and click **More** then either **Delete Document** or **Delete Folder**. When you delete a folder you also delete all of its contents. This includes any content created by other users, even if you don't have permissions to directly delete them. In some views you'll need to click the  information icon. A message prompts you to confirm the deletion.
2. Click **Delete**.

The content is moved to your trashcan. From there you can recover it or delete it permanently.

Site features

As well as the Document Library and Site Members area, there are lots of features that can be included in a site. Site managers can easily add and remove features by customizing a site

The calendar

The site calendar lets you schedule and track events related to the current site.



Site members can create events that appear on the calendar for all site users to see. These events also display in the Site Calendar dashlet. You can view the calendar by day, week, or month. The Agenda view displays upcoming events.

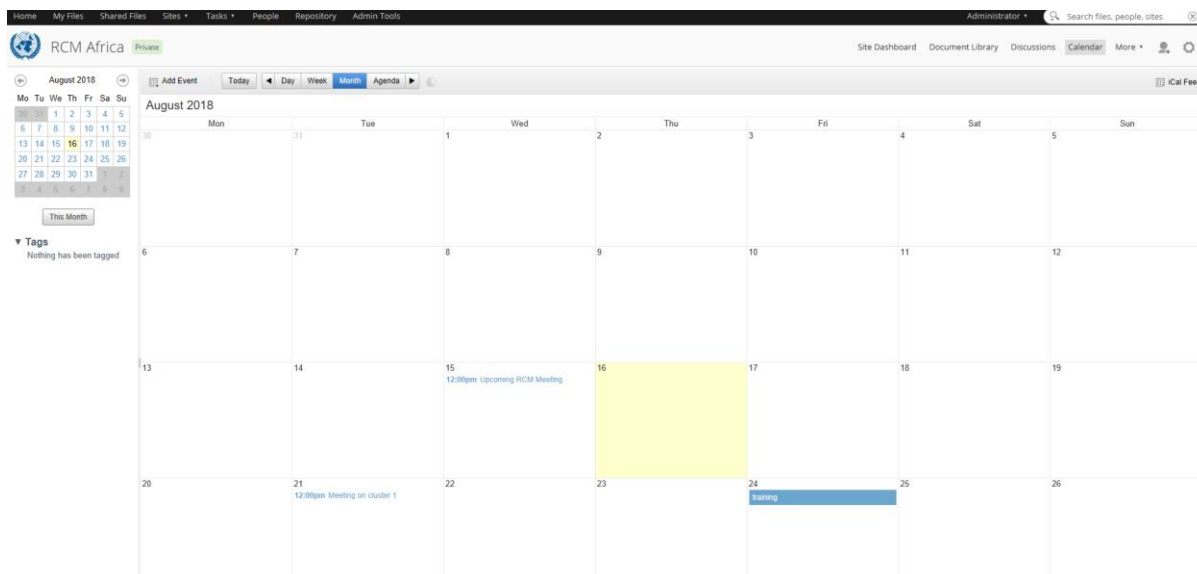


Figure 35 : Calendar Management Screen


Accessing the calendar


Access the calendar to view upcoming events for the current site. Within the calendar you can create events, as well as edit and delete any events that you created. In a site click **More** then **Calendar**. In each site the feature names can be customized. If the site manager has done this, the link might have a name other than **Calendar**. This opens the calendar which defaults to the Month view. Any events scheduled in the current month are displayed on the calendar.

Browsing the calendar


The main view defaults to a calendar displaying the current month. The explorer panel to the left provides another calendar for navigating the months without affecting the main view.

1. In the calendar use the navigation buttons to change the main calendar view:
 - a. Use the **Day**, **Week**, and **Month** buttons to change the main display to a daily, weekly, or monthly view.
 - b. Use the Previous ◀ and Next ▶ buttons to move forward and backward through the calendar, either a day, week, or month at a time, depending on the current view.
 - c. Click **Agenda** to view a list of the upcoming events scheduled for this site.
 - d. Click **Today** to display the current date.

By default, the Day and Week views display only the working hours. Click the  Show all hours icon to display the full day.

2. Use the calendar in the browsing pane to navigate through the months without affecting the main view.
 - a. Click  to display the previous month.



- b. Click  to display the next month.
 - c. Click **This Month** beneath the calendar to reset it to the current month. The current day and any dates with scheduled events are highlighted.
3. Click a date on the browsing pane calendar to load the selected date on the calendar in the main view.
4. Click a tag in the **Tags** list to display only the events associated with that tag. Click **Show All Items** to display all events.
5. Click an event in the calendar to view its full details.
6. Click **iCal Feed** in the header to use the calendar data exchange.

Viewing an event

The calendar displays only the event name and time, so to view full details you must open the event. Once open you can edit or delete the event.

1. In the calendar find the event you want to view in one of the following ways:
 - Navigate the calendar on the main view.
 - Navigate the calendar in the explorer panel and select a date to update the main view calendar.
 - Click **Agenda** to display upcoming events.
2. On the main view click the event you are interested in. You can do this in any view: Day, Week, Month, or Agenda. The **Event Information** dialog box displays the full details of the selected event. The Related Content section shows where you can find material associated with the event if a location has been provided. Click the link to jump to that folder in the library. If you have the correct permissions, you can edit and delete the event from here.
3. Click **Close** to return to the calendar.

Adding an event

Any site member can schedule an event in the site calendar. The event appears in the calendar and the Site Calendar dashlet.

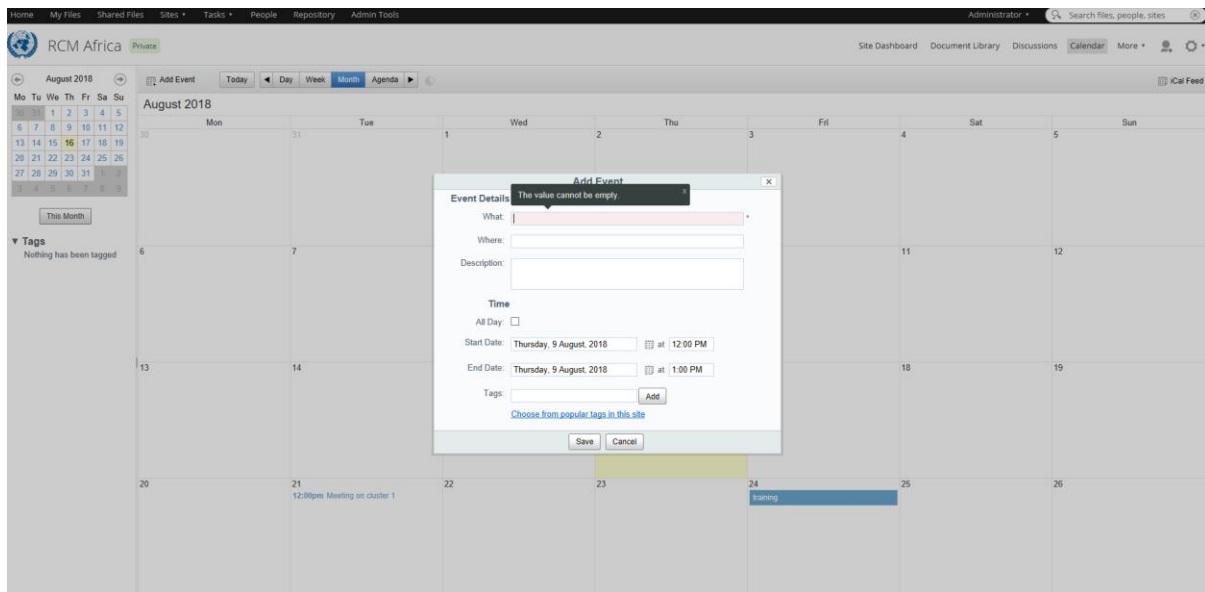


Figure 36 : Adding an event to a calendar

1. In the calendar start the event creation in one of the following ways:
 - Click **Add Event**.
 - Click on an event date on the explorer panel calendar and then click **Add Event**.
 - Navigate the calendar on the main view and click an event date.

To create an event in the Agenda view you must use the **Add Event** button in the header. Simply clicking **Add Event** causes the start and end dates to default to the current date. Specifying a date first, as in the other two methods, causes the start and end dates to default to the date selected.

The **Add Event** dialog box opens. Fields marked with an asterisk (*) are required.

2. Type a name for the event in the **What** box.
3. Type the event location in the **Where** box.
4. Enter a **Description** of the event. The details you enter in these first three fields appear in the Agenda view for all users to see. In the other views only, the event name displays.
5. Select the event start and end dates. The start and end dates default to the same day but events can span multiple days. Click the icon to the right of the date field to display a calendar then navigate to the required month and click a date to select it.
6. Specify the duration of the event: Select **All Day** to schedule a full day event. The start and end times are not applicable when you schedule an all-day event. All times are in 24-hour clock.
7. Add existing or create new tags for the event as necessary.
8. Optionally, select a folder to indicate to users where material related to the event is located:
 - a) In the Related Content section, click **Browse**.



- b) On the **Browse Folders** dialog box navigate the library folder structure and select the appropriate folder.
- c) Click **OK**.

The selected path is displayed on the **Add Event** page.

9. Click **OK**.

Editing event details

Edit a scheduled event to change any of the details, including the location, date, and time. You can also add and remove tags and change the library folder associated with the event.

1. In the calendar find and click on the event you want to edit.
2. Click **Edit** on the **Event Information** dialog box. The **Edit Event** dialog box displays the details for the selected event.
3. Make the required changes to the event and edit any tags as necessary. You can add and remove existing tags or create new tags.
4. Add or change the library folder in the Related Content section to indicate where related event material is located.
5. Click **Save**.

The dialog box closes, and the calendar displays the updated event. No changes will be evident on the calendar unless you changed the event name or time.

Changing event date and time

You can easily change the day, time, and duration of an event.

1. In the calendar find the event you want to edit.
2. Select the **Day** or **Week** view.
3. Edit the event:
 - a. Position the cursor on the resizing bar at the bottom of the event. Click and drag the bar to adjust the duration of the event.
 - b. Position the cursor anywhere in the event span. Click and drag the entire event to a different time slot.
 - c. (Week view only) Position the cursor anywhere in the event span. Click and drag the event to a different day and time.

Deleting an event

When a scheduled event is cancelled you can easily delete it to remove it from the calendar. This also removes it from the Site Calendar dashlet.



1. In the calendar find and click on the event you want to delete. The **Event Information** dialog box displays the full details of the selected event.
2. Click **Delete**. A message prompts you to confirm the deletion.
3. Click **Delete**.

The discussion forum

The discussion forum lets you post user-generated content related to a site. These topics often take the form of questions or comments with threaded discussions. Members of a site can create new topics and can also reply to a posting to take part in a discussion on a specific topic.

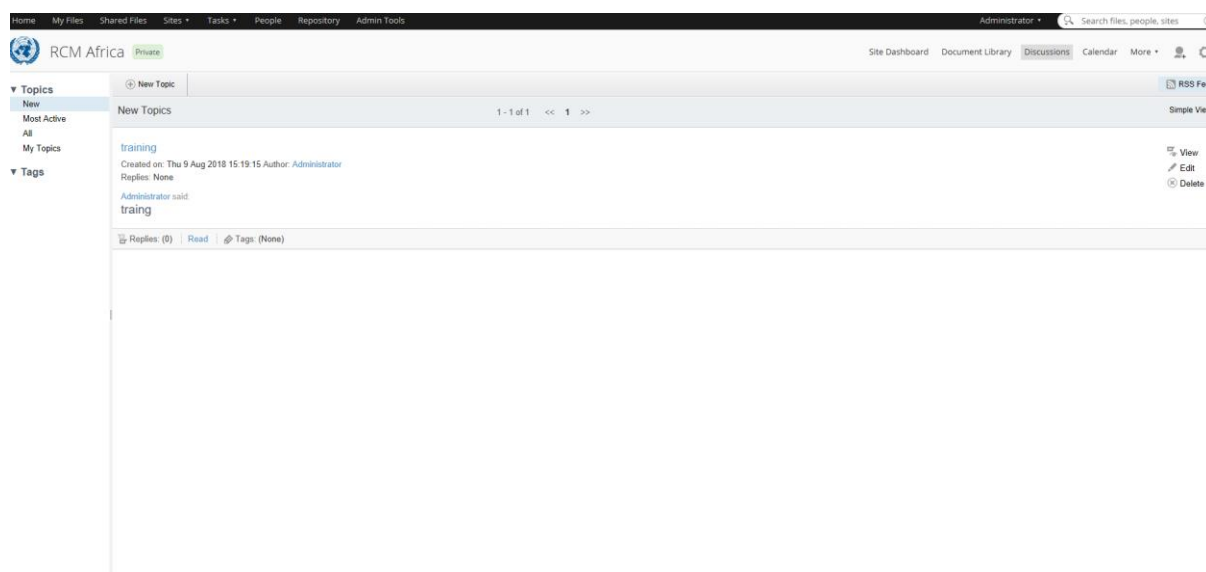


Figure 37 : Discussion forum screen

Accessing the discussion forum

Access the discussion forum to view the discussion topics for the current site. Within a discussion you can create new topics, as well as edit and delete topics you created. You can also take part in a discussion by replying to a topic.

1. In a site click **More** then **Discussions**. In each site the feature names can be customized. If the site manager has done this, the link might have a name other than **Discussions**. This opens the discussion forum. The main page defaults to the **New** view so you see a list of the topics created in the past seven days. The summary includes:
 - the topic title
 - the date and time the topic was created
 - the user who created the topic
 - the number of replies to the topic
 - a sample of the content
 - the tags associated with the topic



2. Use the << and >> navigation buttons to move forward and backward through multiple pages of topics.
3. Click **Simple View** to display only the basic topic information: title, creation date/time, and author.

Click **Detailed View** to display the summary view.

Browsing the discussion topics

The browsing feature in the discussions forum lets you filter the discussion topics so you can more easily navigate the content. The explorer panel on the left side of the page lets you display a subset of the discussion topics by selecting a specific view or a tag.

The **Topics** list in the browsing pane provides the following views:

New

Displays the topics created or updated in the past seven days

Most Active

Displays the topics with the most replies

All

Displays all topics

My Topics

Displays the topics created by the current user

The **Tags** list displays the tags currently associated with one or more discussion topics. The number following the tag tells you how many discussion topics are associated with the tag.

To browse the discussion topics:

1. In the Discussions feature select an option in the explorer panel:
 - a. In the **Topics** list click a view to display the discussion topics in the current site that correspond to that selection.
 - b. In the **Tags** list click the tag you're interested in to display all topics in the current site associated with that tag.
2. Click **Simple View** to display only the basic topic information: title, creation date/time, and author.

Click **Detailed View** to display the summary view.

Viewing a topic

The discussion forum topics display in either a summary view or a simple list. Viewing a topic allows you to see the full contents of the discussion.

Although you can perform actions on a topic from the main page, you might want to view the topic before you edit, delete, or reply to it in order to confirm that you have selected the correct one.

1. In the Discussions feature browse the discussion topics to find the one you want to view.



2. Click the name of the topic to open it. Alternately, click **View** to the right of the topic or click **Read** beneath the topic. If the main page displays the simple view, the **Read** action is not available. The topic view displays the selected topic in its entirety along with any replies.
3. Click **Discussions Topic List** to return to the main view.

Replying to a discussion

Reply to a topic to take part in the discussion. You can reply to the original discussion topic or any replies already created for that topic. Each reply is nested to visually indicate the discussion flow.



Figure 38 : Replying to a discussion

1. In the Discussions feature click the name of a topic to open it. The topic view displays the selected topic in its entirety along with any existing replies.
2. Click **Reply**.
3. Type your content in the **Add Reply** box. Use the features provided to format the text; insert bulleted and numbered lists; change the font colour; and insert or edit links, anchors, and images. To assist with editing, use the undo, redo, and remove formatting features as needed. Additional features are also provided; position the cursor over an icon to display its function. Click and drag the bottom right corner to resize the text editor.
4. Click **Create**.

The reply appears beneath and indented from its parent topic or reply.

Editing a reply

You can edit a reply just as you edit a discussion topic.

1. In the topic list, find and then click on a topic. The topic view displays the selected topic in its entirety, along with its replies.
2. Click **Edit** to the right of the reply you want to change. The selected reply appears in its entirety in an edit box.
3. Make the changes to the topic title and content.
4. Click **Update**.

The updated reply appears as users will see it. The text **(Updated)** appears to indicate it has been edited.



Creating a new topic

Create a new topic to start a discussion relevant to the current site. All site members will have access to this content.

Figure 39 : Creating a new discussion topic

1. In the Discussion feature click **New Topic**. The **Create New Topic** page appears.
2. Type a **Title** for the topic.
3. Type the topic content in the **Text** box. Use the features provided to format the text; insert bulleted and numbered lists; change the font colour; and insert or edit links, anchors, and images. To assist with editing, use the undo, redo, and remove formatting features as needed. Additional features are also provided; position the cursor over an icon to display its function. Click and drag the bottom right corner to resize the text editor.
4. Optionally, add existing or create new tags for the discussion topic. The newly associated tags appear beneath the **Text** box. Click a tag to remove it.
5. Click **Save**. The new topic appears as users will see it.
6. Click **Discussions Topic List** to return to the main view.

Editing a topic

Edit an existing discussion topic to modify or add to the content. Only a Site Manager, a Site Collaborator, and the user who created the topic can edit it.

1. In the Discussions feature click **Edit** to the right of the topic you want to edit. Consider viewing the topic first to ensure it is the one you want to edit. You can then select **Edit** on the topic page. The **Edit Topic** page appears displaying the selected topic.
2. Make the required changes to the topic title and content. Use the features provided to format the text; insert bulleted and numbered lists; change the font colour; and insert or edit links, anchors, and images. To assist with editing, use the undo, redo, and remove formatting features as needed. Additional features are also provided; position the cursor over an icon to display its function. Click and drag the bottom right corner to resize the text editor.



3. Edit the tags for this topic as necessary. You can add and remove existing tags or create new tags.
4. Click **Save**. The updated topic appears as users will see it. The text **(Updated)** appears after the title.
5. Click **Discussions Topic List** to return to the main view.

Deleting a topic

Delete a topic to permanently remove it from the discussions forum. This action also deletes all replies to that topic. Only the Site Manager and the user who created the topic can delete it.

1. In the Discussions feature click **Delete** to the right of the topic you want to delete. Consider viewing the topic first to ensure it is the one you want to delete. You can then select **Delete** on the topic page. A message prompts you to confirm the deletion.
2. Click **Delete**. A message indicates the selected topic has been deleted.

Site links

The links component lets site members compile a list of web links that are related to the site or that might be of interest to site users. These can be internal links pointing to site pages or external links pointing to any web address.

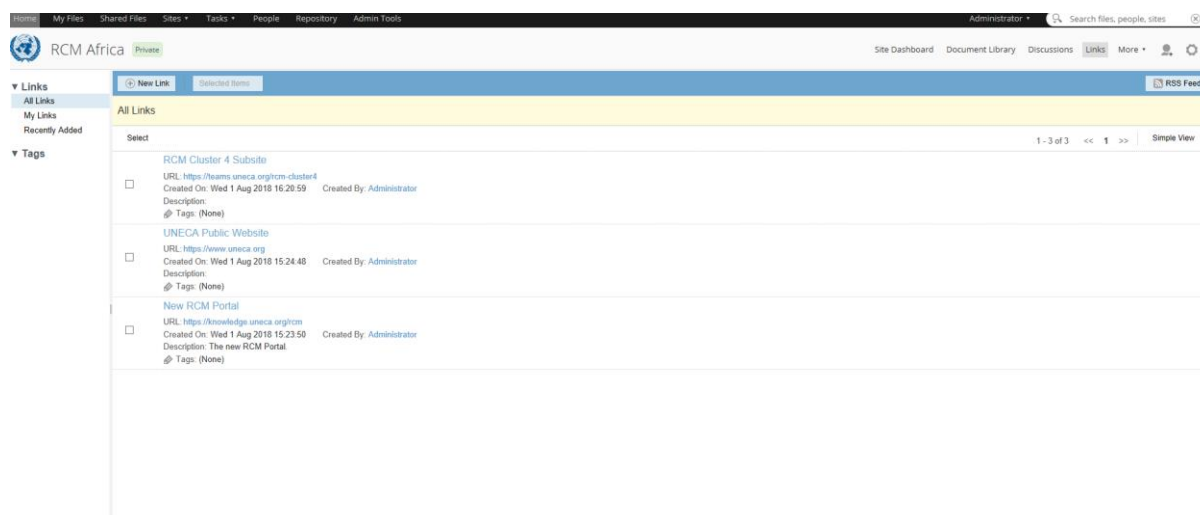


Figure 40 : Site links screen

The comment feature allows site members to add and manage comments on the site links.

Accessing the site links

Access the site links component to view the web links compiled for the current site.

In this component you can create new links, as well as edit and delete the links that you created. You can add a comment to any link listed.

1. In a site click **More** then **Links**. In each site the feature names can be customized. If the site manager has done this, the link might have a name other than **Links**. This opens the component. The main view defaults to the **All Links** view so you are seeing a list of all web links created for the site. The summary includes:
 - the link titles



- the link URL
 - the date and time the link was created
 - the user who created the link
 - a description of the link
 - the tags associated with the link
2. Use the << and >> navigation buttons to move forward and backward through multiple pages of links.
 3. Click **Simple View** to display only the basic link details: title and URL. Click **Detailed View** to display the summary view.

Browsing the site links

The explorer panel on the main view enables you to filter the links for easier navigation. The explorer panel on the left side of the page lets you display a subset of the links by selecting a specific view or a tag. The **Links** list in the browsing pane provides the following options for browsing links:

All Links

Displays all links

My Links

Displays the links created by the current user

Recently Added

Displays the links created in the past seven days

The **Tags** list displays all tags currently associated with one or more links.

To browse the links:

1. In the Links feature select an option in the explorer panel:
 - a. In the **Links** list click a view to display the links in the current site that correspond to that selection.
 - b. In the **Tags** list click the tag you're interested in to display all links in the current site associated with that tag.
2. Click **Simple View** to display only the basic link details: title and URL.

Click **Detailed View** to display the summary view.

3. Position the cursor over an item in this list to display its available actions.

Viewing a link

The main view of the Links feature displays the existing links for this site. You can choose a summary view or a simple list. Viewing a link enables you to see the full link details as well as any comments that have been added.



Although you can perform actions on a link from the main page, you might want to view the link before you edit or delete it in order to confirm that you have selected the correct one.

1. In the Links feature browse the links to find the one you want to view.
2. Click the title of the link to display the full details. The link view displays the selected link in its entirety, along with any comments that have been added.
3. Click **Links List** to return to the main view.

Creating a new link

Create a new site link to provide easy access to information that could be of interest or use to the site members. You can add any internal or external web address.

Figure 41 : New site link creation screen

1. In the Links feature click **New Link**. The **Create Link** page appears.
2. Type a **Title** and **Description** for the link.
3. In the **URL** box type the web address for the link you are creating.
4. To have the link open in the same browser window, select **Internal**. Leave this option blank to have the link open in a new browser window or tab.
5. Optionally, add existing or create new tags for the link. The newly associated tags appear. Click a tag to remove it.
6. Click **Save**. The new link appears.

Editing a link

Edit an existing link to modify it. Only a Site Manager, a Site Collaborator, and the user who created the link can edit it.

1. In the Links feature browse the links to find the one you want to edit.
2. Position your cursor over the link to display the available actions and then click **Edit**. You can view the link first to ensure it is the one you want to edit, then select **Edit** on the link view page. The **Edit Link** page appears displaying the selected link.
3. Make the changes to the link details.
4. Edit the tags for this link as necessary. You can add and remove existing tags, or create new tags.



5. Click **Update**. The link view displays the updated details.
6. Click **Links List** to return to the main view.

Deleting a link

Delete a link to permanently remove it from the current site. This action also deletes any comments on the link. Only the Site Manager and the user who created the link can delete it.

1. In the Links feature browse the links to find the one you want to delete. When deleting more than one link you can use the multiple selection feature provided.
2. Position your cursor over the link to display the available actions and then click **Delete**. Consider viewing the link first to ensure it is the one you want to delete. You can then select **Delete** on the link view page. A message prompts you to confirm the deletion.
3. Click **Delete**.

A message indicates the selected link has been deleted.

Adding a comment to a link


In the links feature you can add a comment to a link.

1. In the Links feature find and click the link you want to comment on. The detail view displays the selected link along with any related comments.
2. Click **Add Comment**.
3. Enter your comment in the box provided. Use the features provided to format the text; insert bulleted and numbered lists; and change the font colour. To assist with editing, use the undo, redo, and remove formatting features as needed.
4. Click **Add Comment**. The comment displays beneath the link.
5. Click **Links List** to return to the main view.



Deleting a link comment


Delete a comment to permanently remove it from a link. Only a Site Manager and the user who created the comment can delete it.

1. In the Links feature find and click the link containing the comment you want to delete. The detail view displays the selected link along with any related comments.
2. Position your cursor over the comment you want to delete to display the available actions and then click the  Delete option. This action is available only when the currently signed in user has permission to delete the comment. A message prompts you to confirm the deletion.
3. Click **Delete**. The comment is removed from the page.
4. Click **Links List** to return to the main view.

Editing a link comment

You can edit a comment on a link to modify or add to its content.

Only a Site Manager, a site Collaborator, and the user who created the comment can edit it.

1. In the Links feature find and click the link containing the comment you want to edit. The detail view displays the selected link along with any related comments.
2. Position your cursor over the comment you want to edit to display the available actions and then click the  Edit icon. This action is available only when the currently signed in user has permission to edit the comment. The **Edit Comment** box appears displaying the selected comment.
3. Make the changes to the comment. Use the features provided to format the text; insert bulleted and numbered lists; and change the font color. To assist with editing, use the undo, redo, and remove formatting features as needed.
4. Click **Save**. The updated comment displays.
5. Click **Links List** to return to the main view

Data lists

The data lists component lets site members create and manage lists of data relevant to the site. Users can work with their own lists and can also contribute to lists created by other site members.

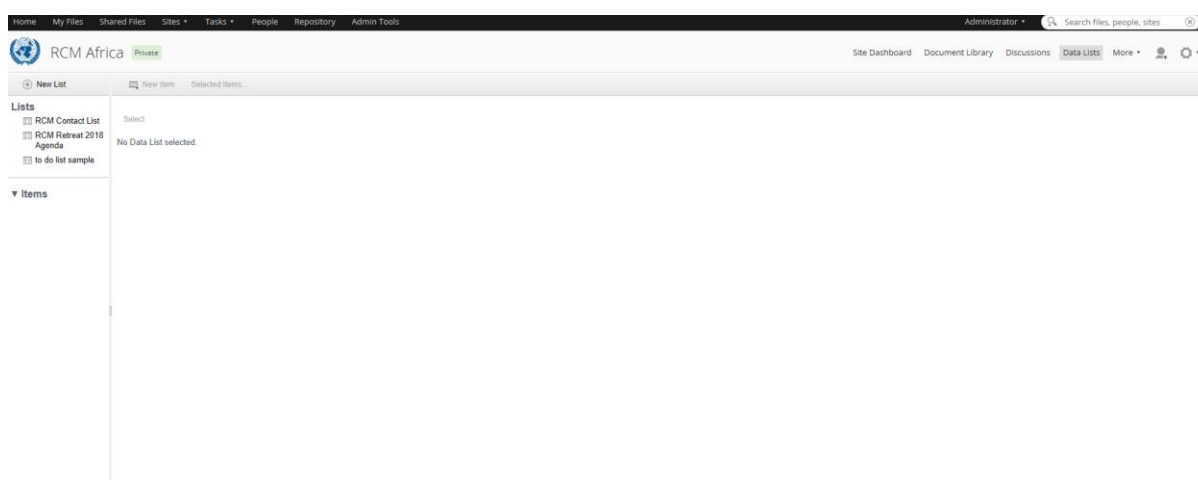


Figure 42 : Data lists management screen

Accessing the Data Lists component

Access the data lists component to view the lists created for the current site. In this component you can create new lists, as well as edit and delete any lists that you created. In a site click **More** then **Data Lists**.

In each site the feature names can be customized. If the site manager has done this, the link might have a name other than **Data Lists**. This opens the feature. The browsing pane displays a list of all existing data lists for the current site.

Viewing a list

The **Lists** section of the explorer panel displays the data lists for the current site. Once you select a list to view you can apply filters to display specific list items within that list. The **Items** list in the explorer panel provides the following options for filtering the rows displayed in the current list:

All

Displays all list items

Recently Added

Displays the list items created in the past seven days

Recently Modified

Displays the list items modified in the past seven days

Created by Me

Displays the list items created by the current user

1. In the Data lists explorer panel click the list you want to view. The main view displays the selected list in its entirety. Where the list contains more items than can be displayed on a single page, navigation links become enabled at the top and bottom of the list. The number in bold indicates your current page. Click a page number to display a specific page. Use the previous (<<) and next (>>) links to move forward and backward through multiple pages of items.



2. In the **Items** list click the view representing the list items you want to display. The current list displays only the list items that correspond to the selection.
3. In the table click a column heading to sort the results by that column.

Creating a new list

Create a new list for the current site.

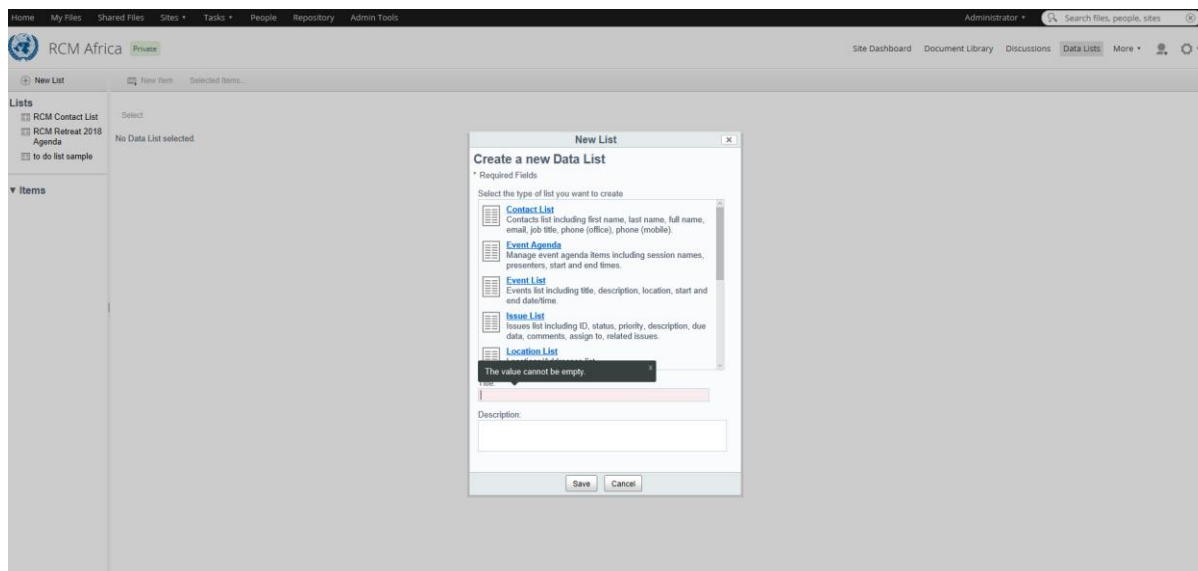


Figure 43: New list creation screen

1. In the Data lists feature click **New List**. The **New List** dialog box appears.
2. Select the type of list you want to create.
3. Type a **Title** (required) and **Description** (optional) for the list.

CAUTION:

You are not warned if you create lists with duplicate titles. Review the existing lists to ensure that your list name is unique.


4. Click **Save**. The name of the new list appears in the **Lists** section of the browsing pane.
5. Click the list name to display the list in the main view.

A new list contains no list items.

Editing the list details

Edit an existing list to modify its title and description.

Only a Site Manager, a Site Collaborator, and the user who created the list can edit it.

1. In the Data lists explorer panel position your cursor over the list you want to edit to display the available actions.
2. Click the  Edit icon.

The **Edit List Details** dialog box appears displaying the current list details.



3. Make the changes to the title and description.


CAUTION:

You are not warned if you create lists with duplicate titles. Review the existing lists to ensure that your list name is unique.

4. Click **Save**.

Deleting a list

Delete a list to permanently remove it from the site. Only the Site Manager and the user who created the list can delete it.

1. In the Data lists explorer panel position your cursor over the list you want to delete to display the available actions.
2. Click the  Delete option. A message prompts you to confirm the deletion of the selected list.
3. Click **Delete**.

A message indicates the selected list has been deleted.

Searching for content

You can use the search box on the toolbar to search for files, sites, and people.



Figure 44 : Search Screen

Type your search into the search box, and a list of matching files, sites, and people will be shown as you type. If you're in a site you can click **Search all content** or **Search in [sitename]** to search all sites or just the site you're in. Private sites that you're not a member of, and their files, aren't shown.

There are lots of search tips available, including:

- Type * to complete a word if you don't know the full word you're searching for. For example, both "**resco*" and "*alf**" will show results for *Extranet Team's Portal*.
- To search for items that contain only one of several words, use OR and surround your search with brackets, for example, (*big OR red*). If you don't use brackets, search results are returned containing both *big* and *red*.

The five most relevant files, sites, and people are shown, but you can click **More** to see further results.

You can either:



- Click on one of the results to go straight to it, or
- Press Enter (with the cursor in the search box) to view all the **search results** for all files found by your search.

Search results

If you press Enter in the Search box then all the files and folders found by your search are shown.

You can now:

- Click on a result thumbnail to preview it.
- Click on a result name to open it.
- Click on one or more of the filter options to switch them on and off and narrow down the search results.
- Hover over a result and click **Actions** and select an option from the menu.
- Select multiple results and click **Selected Items** to select an action option.

The main file actions are available here, but you may find more options available when you preview the file. You can delete a file this way but the search results won't be updated until you run a new search.

Using the Site Finder

You can search for sites using the search box on the toolbar or you can use the Site Finder to get more detailed site information. From the search results you can navigate to a site, join or leave sites, and delete a site (managers only).

1. Open the **Sites** menu and click **Site Finder**.
2. Type a full or partial site name in the search box. Leave the search box empty to display all sites you have permission to access. The search looks for sites starting with your search criteria, so entering the search criteria *awe* won't find the site *Project Awesome*. If you add *, so your search criteria is **awe*, then you will find the site.
3. Click **Search**.

A list of sites matching your criteria is shown. This list includes public sites, moderated public sites, sites you created, and private sites that you belong to. To the right of a site, the actions **Join** and **Request to Join** indicate you are not a site member; the action **Leave** indicates you are a site member.

Using the People Finder

You can search for people using the search box on the toolbar or you can use the People Finder to get more detailed user information. When you find the user, you are looking for you can use the Follow/Unfollow option. You can also view their user profile.

1. Click **People** on the toolbar.
2. Type a full or partial name in the search box. You must enter at least one character. The search is not case sensitive. The search looks for user names starting with your search criteria, so entering the search criteria *1* won't find the user *User1*. If you add *, so your



search criteria is *1, then you will find the user. See the search tips provided on the People Finder page to perform more complex searches.

3. Click **Search**.
4. In the results list, click a user name to display that user's profile.

Reviewing a user profile

When you search for a user, you can view their profile details. The profile details are organized across several pages:

Info

Displays the user's personal details, including contact information, company details, and a photo.

Sites

Lists the sites the user belongs to.

Content

Displays two lists detailing the user's recent site activities.


The **Recently added** list displays the last three pieces of content that the user added to any site. This includes wiki pages, blog postings, library content, and discussion items. The **Recently modified** list displays the last three pieces of content the user edited.

Following (#)

Displays a list of people the user is following. The number to the right of the page label indicates how many people are currently being followed by this user. If the user has marked their list as private, this page will not appear in the profile.

Using the Advanced Search

Use the search box in the toolbar to access the advanced search.

1. Click  in the search box then click **Advanced Search**. The Advanced Search screen displays.
2. Choose a search type:
 - **Content:** Searches for all types of content
 - **Folders:** Searches for all folders and containers, such as library folders and data lists
3. Enter your search criteria. To search by modification date, click the calendar icon to select a date from a calendar. To search by the user who last modified the content, enter the appropriate user name in the **Modifier** field. You can type * to complete a word if you don't know the full word you're searching for. For example, both **resco* and *alf** will show results for *Extranet Team's Portal*.
4. Click **Search**.

All the files and folders found by your search are shown. You can now:

- Click on a result to open it.



- Click on one or more of the filter options to switch them on and off and narrow down the search results.
- Hover over a result and click **Actions** and select an option from the menu.

User roles and permissions

A user's role determines what they can and cannot do in a site. Each role has a default set of permissions.

The following sections describe these permissions. In general:

- Managers have full rights to all site content - what they have created themselves and what other site members have created.
- Collaborators have full rights to the site content that they own; they have rights to edit but not delete content created by other site members.
- Contributors have full rights to the site content that they own; they cannot edit or delete content created by other site members.
- Consumers have view-only rights in a site: they cannot create their own content.

Note: As well as these four default roles you might also see additional roles in different places in Extranet Team's Portal Share.

- Coordinator - has full rights to all content - what they have created themselves and what others have created.
- Editor - has rights to edit file properties and check files in and out; they cannot create their own content.

Your Extranet Team's Portal Administrator can also add additional roles.

Site managers can change a site role for the site users.

If you're a member of two user groups which have different permissions then you will get the sum total of all the permissions. For example, if Group 1 has permission to view a file and Group 2 has permission to view and edit a file, then you would have view and edit permission for the file.