



**NEW USER TRAINING**  
**CDC TEAM**

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September 26, 2006

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## **FEATURES AND BENEFITS OF CDC TEAM**

### **INTRODUCTION**

Collaboration using SiteScape Enterprise Forum (SEF) is a way to bridge the gap between working alone at your computer and working together with teammates during meetings. Forum facilitates online work, creating a "virtual meeting space."

SiteScape is a web-based software application that allows users to collaborate through a team workspace equipped with discussion forums, calendars, document, task, and meeting management.

By using SiteScape, users will see an increase in team synergy:

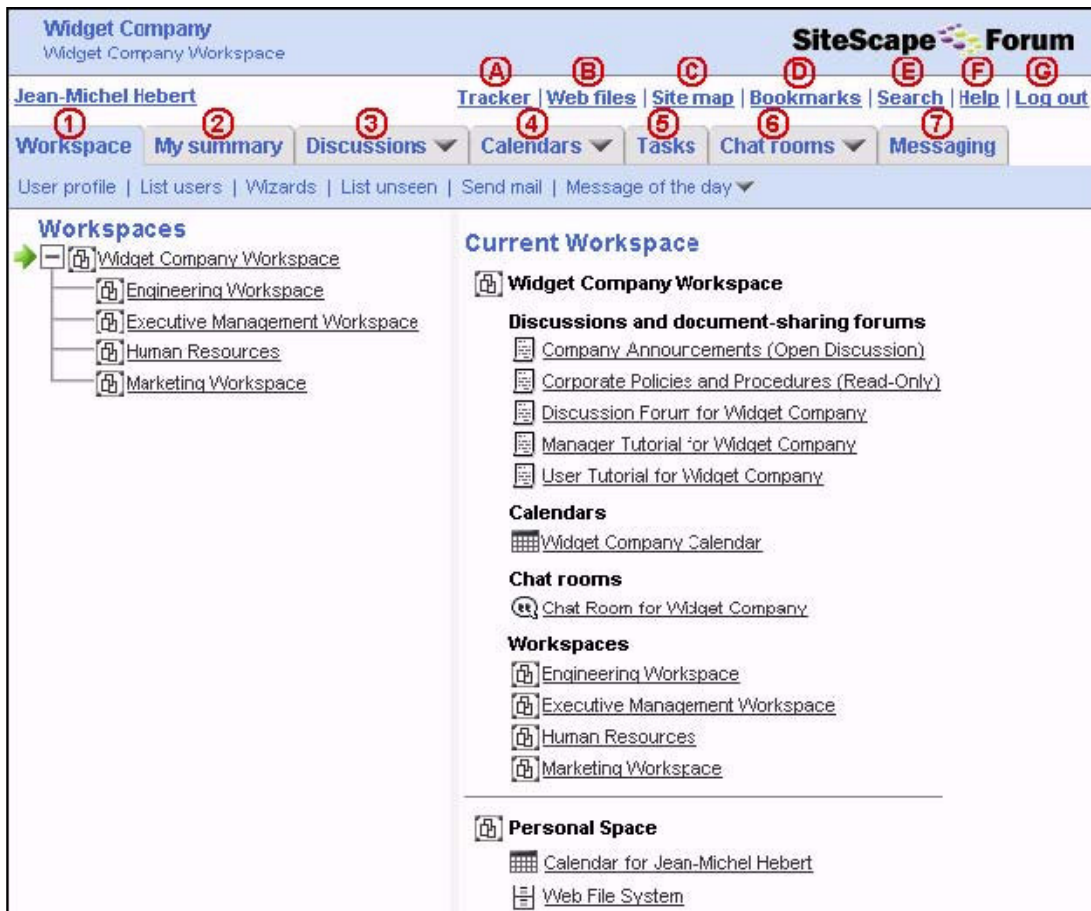
- You and your teammates can collaborate without having to be in the same room or working at your computers at the same time. Someone can post a note or document to a discussion, and, at their convenience, teammates can review and further develop the idea. With Forum, collaboration is ongoing and potentially never ending.
- Ideas are formed together, interactively, with your teammates. By the time you hold that meeting in the conference room, the team has already been a part of the formation of the idea, and teammates are more likely to understand it, buy into it, and assist with its implementation. Forum becomes a "pre-meeting" meeting.
- Documents are reviewed earlier in the process, allowing easier modifications and adjustments. Forum also makes it easier for more than one person to write a document, because you can use Forum to define who gets to access the document at which point in the writing process.
- Your collaborative process is preserved and publicly accessible in Forum. (No more searching through e-mail folders in a frantic effort to "catch someone up" on a lengthy e-mail discussion.) To review past discussions and decisions, or to review a previous version of a document, use Forum's powerful search capability to locate the historical information quickly and easily.

## CDC TEAM FEATURE SET AND TERMINOLOGY

### Forums

Forums are applications that enable you to communicate and collaborate with your teammates and partners. Some forums are optional. For example, some companies never enable the “Chat rooms” forum because of company policy.

The following sections introduce the forum structure and types. The numbers correspond to the numbers in the picture.



### Forum Structure

The green arrow indicates the Current Workspace. Under that heading on the right you see the list of discussions and document-sharing forums, calendars, and workspaces.

#### (1) Workspace

A *workspace* is a collection of navigation pages and forums that members of a group can use to work toward a common goal. Workspaces are like online office spaces. Just

as the Engineering Department and the Sales Department may be located on separate floors of an office building, your zone may have an engineering workspace primarily for engineers and a sales workspace primarily for salespeople. The workspace page displays links to all of the forums (such as discussions and calendars) that are available to a user in that workspace.

A user may be allowed access to more than one workspace. If this is the case, he or she can see links to additional workspaces on the left side of the workspace page. Users without access permission do not see these links. For information about the complete list of workspaces and forums available in your organization, contact your workspace manager.

More information about the workspace page is in this chapter.

### (2) My summary

The “My summary” page provides a concise display of summary information about your workspace and about forums that are important to you. You configure the “My summary” page according to your preferences.

### (3) Discussions

Discussions include threaded discussion topics, documents, URLs, and surveys. Threaded discussion topics are posted notes and replies to the notes. Discussion forums provide a dynamic, synergistic working space in which you can combine information (files, plans, documents, URLs) with discussions about that information (replies and surveys).

To select a specific forum either click the forum title directly or click the Discussions tab to display a small pop-up box that also has a listing of the discussion forums. Options listed on the Discussion tab include Add, Modify/delete, Tools, Next unseen, List unseen and Search.

When a discussion thread is finished, Forum contains a snapshot of the information exchange. A new member of the team can review discussion entries to understand the way that documents were developed, the logic behind decisions, and other important historical information about a project.

More information about using discussions is in this chapter.

### (4) Calendars

Calendars provide a mechanism for tracking appointments. Workspace calendars are available to all of the users in a workspace, and users may be able to create personal calendars (if the zone manager has enabled this feature). You can share appointments between your Forum calendar and your Microsoft Outlook calendar by exporting and importing entries from one calendar to the other.

### (5) Tasks

Tasks provide an automated way to keep track of your work. You can assign tasks and reminders to yourself or to other users. You can also attach a task to a discussion entry, so that the entry can provide documents or replies that assist in the completion of the task. Forum can notify assignees by e-mail when a task is assigned, almost due, or overdue.

### (6) Chat Rooms and Meetings

Chat rooms allow synchronous collaboration in the form of chat sessions, in which a large number of people can participate at the same time. The chat session displays comments in the order in which they are submitted, forming a stream of conversation. When the conversation is finished, the manager can mark the chat session as *inactive*. The transcript of the conversation is then available.

Forum eMeeting enables you to host web conferences from within the context of Forum. Forum eMeeting includes capabilities for live application sharing, whiteboarding with markup, audio conferencing, web tours, instant feedback, and more. (This feature is optional and must be purchased separately from SiteScape. It may not be available on your installation.)

For more information about Forum eMeeting, see the online User Help system.

### (7) Messaging

The ability to send instant messages using Forum has been disabled.

## RULES OF BEHAVIOR

This **CDC Team Collaboration Site (CDC Team)** is shared by many people and groups, and its effectiveness and integrity depend upon common observance of rules for safe and appropriate use. As a user of this facility, you are required to comply with the following rules:

- You must assess content you intend to post and refrain from posting it if it is sensitive in nature. Content is deemed sensitive if its inappropriate release or distribution could compromise CDC's ability to function or damage CDC's reputation .
- You may not use this system to distribute copyrighted or licensed material illegally, to post fraudulent, insulting, sexually explicit content, or for solicitation, harassment, or personal financial gain.

- You may not attempt to circumvent system security controls, e.g. to bypass the user login controls or to access forums to which you have not been granted access.
- If you witness another user violating these rules you must notify the Forum Director, the ECTP Technical Support Team, or the **CDC Helpdesk** immediately.
- You should report system problems as soon as possible to the **CDC Helpdesk**. Please be as thorough as possible.

If you are a workspace or forum administrator, you are also responsible for the following:

1. Grant forum access only to individuals who have legitimate need for access,
2. Monitor your forum(s) to ensure that users are using forum(s) in compliance of these rules, and that only authorized users are accessing your forum(s),
3. Take steps to curtail inappropriate use of forum(s), up to an including revoking access of users,
4. Close down forums that have ceased to be useful or active, or request that they be merged with other forums.

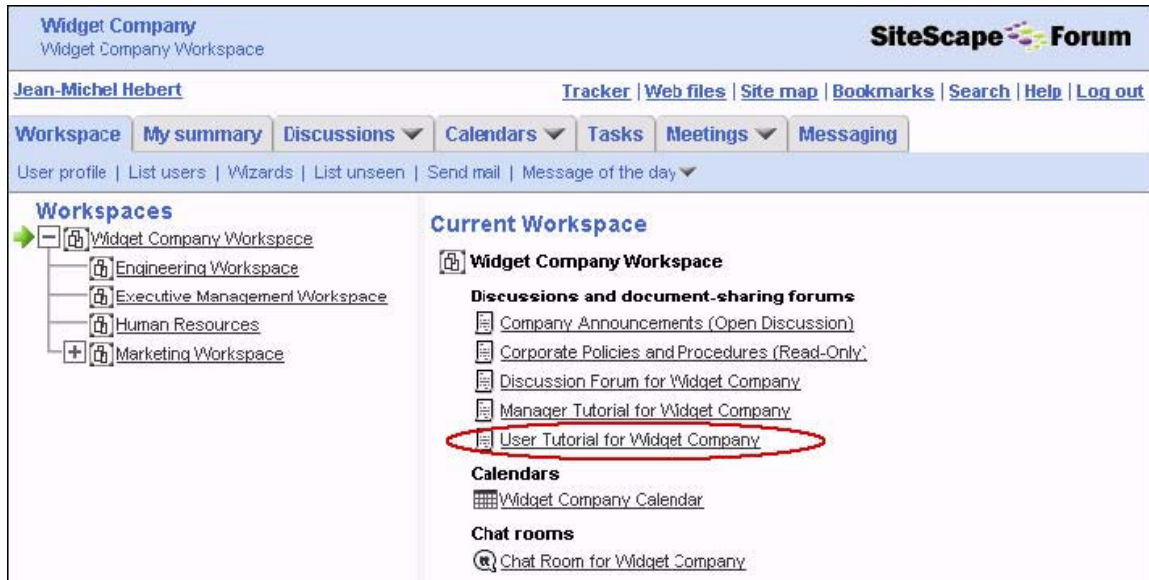
Failure to abide by these rules is subject to penalties that can be imposed under existing policy and regulation including reprimands, suspension of system privileges or duty, termination, and criminal prosecution.



# DISCUSSION FORUMS

## VIEW A DISCUSSION FORUM

You view a discussion forum by clicking its name on the right side of the workspace page. (You can also click the Discussions tab, then click the name of a discussion.)



The discussion forum that you chose appears, displaying a list of entries (discussion topics, replies, documents, and more).

The screenshot shows the SiteScape Forum interface for 'Widget Company'. At the top, there's a header with the company name and 'SiteScape Forum'. Below that, the user 'Jean-Michel Hebert' is logged in, with navigation links like 'Tracker', 'Web files', 'Site map', 'Bookmarks', 'Search', 'Help', and 'Log out'. A toolbar contains 'Workspace', 'My summary', 'Discussions', 'Calendars', 'Tasks', 'Meetings', and 'Messaging'. A sub-toolbar has 'Add', 'Modify/delete', 'Tools', 'Next unseen', 'List unseen', and 'Search'. The main content area is titled 'User Tutorial for Widget Company' and contains a welcome message and instructions. Below this is a 'User filters' section with a 'None' button. The main part of the screenshot is a table listing discussion topics.

Unseen	Number	Type	Task	Title	Replies	Author	Activity date
	8.			<a href="#">Helpful hints about discussion forums</a>	(3)	Administrator	02/27/04 05:02 PM
	7.			<a href="#">Example Survey: Do you like the default colors?</a>	(4)	Administrator	02/27/04 05:00 PM
	6.	URL		<a href="#">Example URL</a>	(1)	Administrator	02/18/04 10:01 AM
	5.			<a href="#">Example document</a>	(3)	Administrator	02/27/04 04:54 PM
	4.			<a href="#">Example discussion topic</a>	(4)	Administrator	02/18/04 11:08 AM
	3.			<a href="#">Learning about SiteScape Forum</a>	(6)	Administrator	02/27/04 04:06 PM
	2.			<a href="#">Please click here to sign in</a>		Administrator	02/17/04 11:14 AM
	1.			<a href="#">Introduction to this discussion</a>	(3)	Administrator	02/17/04 11:06 AM

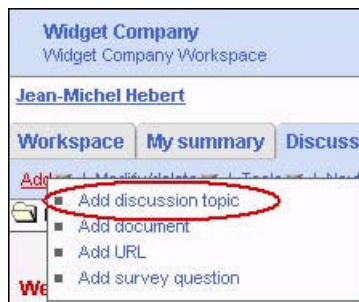
In a discussion, information is organized in folders. Folders can contain subfolders, which in turn can contain subfolders, and so on. To view the list of entries in a subfolder, click the subfolder name. To view an entry, click its title in the list.

## POSTING TO AND REPLYING TO MESSAGES IN A DISCUSSION BOARD

### Add a Discussion Topic

To add a discussion topic:

- 1 - In the discussion forum, view the list of entries.
  - 2 - Click the **Add** toolbar item on the left side of the toolbar.
- A drop-down menu appears, displaying the possible entry types.



3 - Click **Add discussion topic**. The “Add a discussion topic” form appears.

4 - Once the Web form below is displayed, enter the **Title** of your discussion topic into the Title text box.

5 - Enter additional description text into the Text box. (Note: You can use additional formatting options in the text box to highlight especially important passages, or to otherwise demonstrate additional importance to specific text.

6 - For **Keywords**, enter any keywords that might appear. If a standard vocabulary is available, those items will appear as a pick list. Otherwise, you will need to enter keywords as free-form text entries. Using keywords will allow other users to more quickly find this particular post when they do key word searches.

7 - Check the **Allow other members to modify this entry**, if you want other CDC Team users to have the ability to modify the contents of this entry.

8 - Check the **Send me e-mail whenever anyone replies to this entry** option if you want CDC Team to send you an email (via Outlook) if anyone replies to this entry

CDC Team also allows you to attach a file to the Discussion topic.

9 - The **Attach more files** check box allows the CDC Team user to attach multiple files to a discussion topic.

10 - Click the **Ok** button. The entry you created appears.









In Internet Explorer, you can use the HTML editor to format your text (in other browsers, you can use the regular text editor). For example:

Add a discussion topic to [User Tutorial for Widget Company](#)

**Title**  
A new discussion topic

**Text**

Style  Font  Size

**B** ***I*** **U**        

Use the tools in this HTML editor to emphasize text by using **bold**, *italics*, or underscores.  
You can change the font style, size, and color, and you can add [links](#).

You can center text, or

change the indent level in some other way, and you can add lists:

1. Item one
2. Item two

- Item one
- Item two

View HTML [Stop using the HTML editor](#) [Check spelling](#) ▼

[Editing options...](#)

**Keywords (separated by commas)**

**Allow other members to modify this entry** (This overrides the default access controls set by the administrator.)  
 **Send me e-mail whenever anyone replies to this entry.**

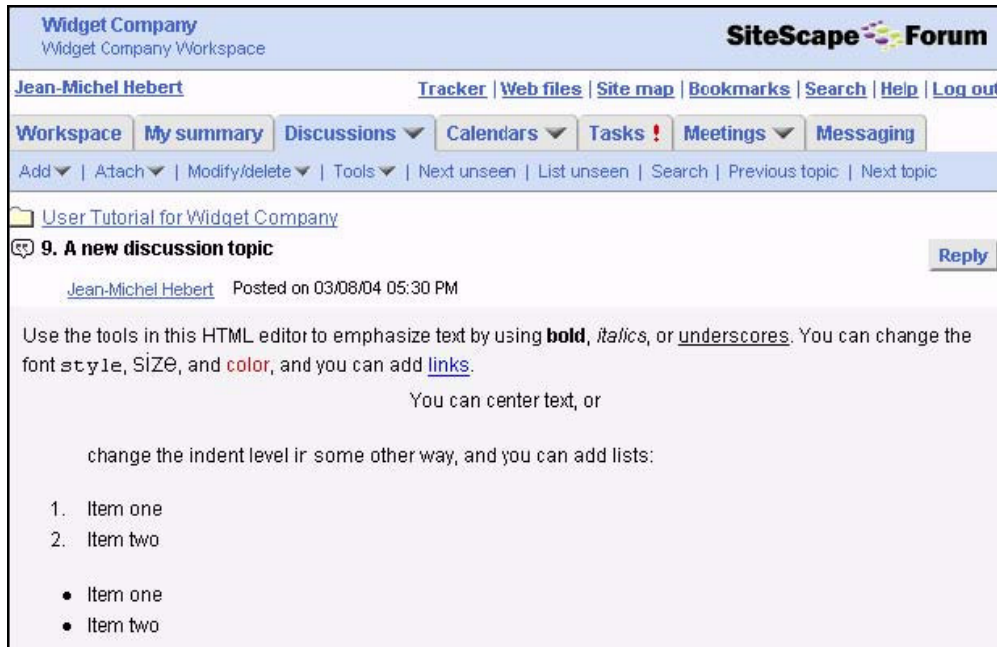
**Attach a file**

**Attach more files** (a prompt will appear after you click OK)

You can copy and paste Microsoft Word and Excel files directly into the HTML editor. Files retain their formatting. To enter HTML directly, click the “View HTML” checkbox at the bottom of the text box, and make sure that you use closing tags such as:

</p>  
</li>  
</ol>

Otherwise, you may encounter display problems when you view the entry in the discussion forum. The HTML editor does not support scripts.



This view is what other users see when they click the title of your entry in the list of entries.

## ADD A REPLY WITH AN ATTACHED DOCUMENT

After reading an entry in a discussion forum, you may decide to add a response. You can attach files to several kinds of entries; in this example, you attach one to a reply.

To add a reply to a discussion-forum entry:

- 1 - In the discussion forum, click a title that interests you in the list of entries. The entry appears.
- 2 - To the far right of the entry title, click the **Reply** button. The “Add reply to...” form appears. It is similar to the form for adding a topic.
- 3 - In the “Title” text box, specify a descriptive title for the reply.
- 4 - Enter the text of the reply in the “Text” box. You do not need to enter your name, because Forum automatically includes a signature line. The signature line includes the full name you gave when you registered, and the date and time that you entered the reply.
- 5 - Next to the **Attach a file** box, use the **Browse** button to locate a file on your computer.
- 6 - Click **OK**.

The title that you provided now appears in the list of replies to the discussion topic. A

link to the attached file also appears.

The screenshot shows a web interface for a discussion topic. At the top, there is a folder icon and the text "User Tutorial for Widget Company". Below this is the title "9. A new discussion topic" with a "Reply" button to its right. The author is "Jean-Michel Hebert" and it was posted on "03/08/04 05:30 PM". The main content area contains text about HTML formatting: "Use the tools in this HTML editor to emphasize text by using **bold**, *italics*, or underscores. You can change the font style, size, and color, and you can add links." followed by "You can center text, or" and "change the indent level in some other way, and you can add lists:". Below this is a numbered list with two items: "1. Item one" and "2. Item two", followed by a bulleted list with two items: "• Item one" and "• Item two". At the bottom, there is a "Replies:" section with a red oval around the title "9.1. A reply to the new discussion topic" and a "Reply" button to its right. The author is "Administrator" and it was posted on "03/08/04 05:53 PM". Below the reply is the text "Please implement the attached revisions." and an "Attachments" section with a red oval around the attachment "Revisions.doc" and a "Reply" button to its right. The attachment is dated "03/08/04 05:53 PM (20 KB)".

In addition to placing a response at the end of the list of replies, you can place your response in the middle of the list by replying to another reply. To do this, view the reply to which you want to respond, then click **Reply** to the far right of its title. After you enter your reply, it appears below the reply you were responding to.

## DELETE AN ENTRY

You can delete only those entries that you created (or you must have management privileges to delete entries). This section describes how to delete a discussion topic. The process for deleting other entries (documents, surveys, URLs) is the same.

To delete a discussion topic:

- 1 - View the discussion topic.
- 2 - Click the **Modify/delete** toolbar item. A menu appears
- 3 - On the menu, choose **Delete**. The Delete items from..." page appears, displaying a list of folders and entries that you have access to delete.
- 4 - Click the title of the discussion topic you want to delete. You can select multiple items by Ctrl+clicking the titles of the entries you want to delete.

**Note:** *Ctrl+click is a method used on Windows systems for selecting multiple items in a list. If you are not using Windows, use the method supported by your system.*

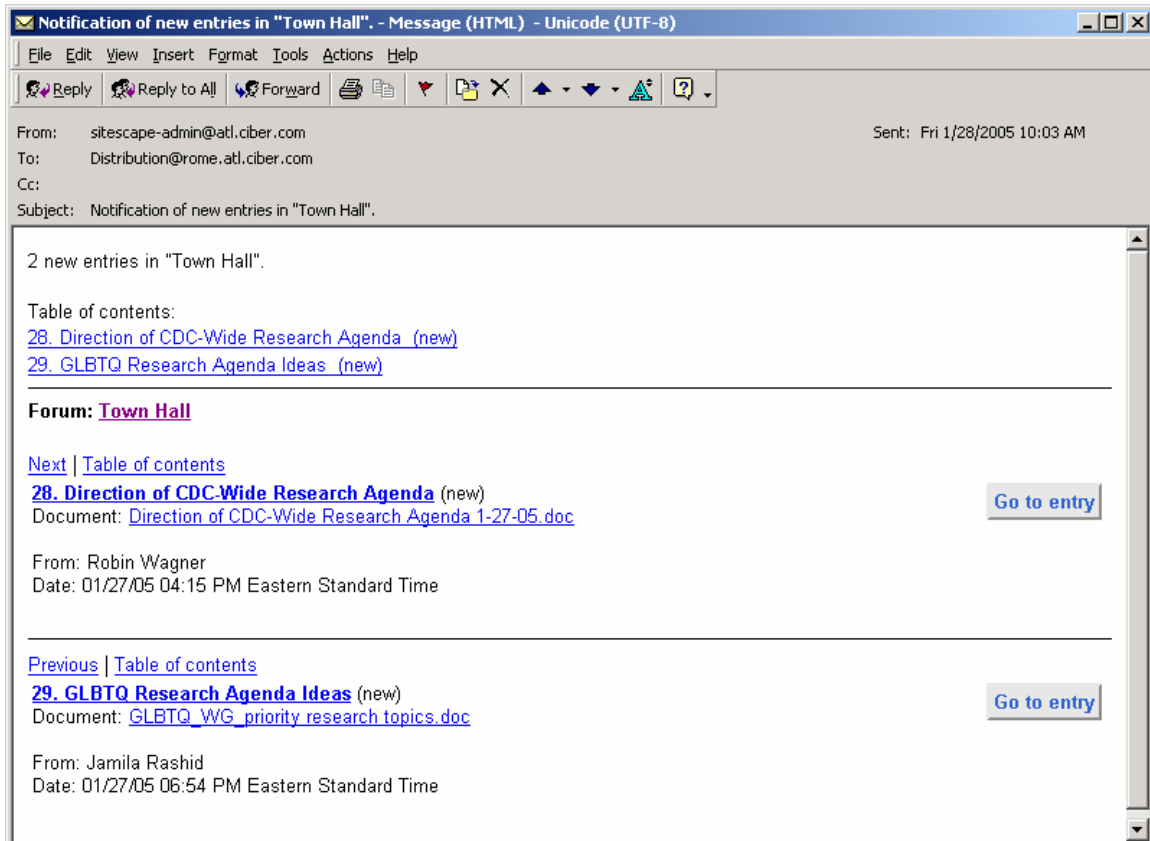
5 - Click **OK**. A confirmation form appears, explaining that this action cannot be reversed. (There is no “Undo” button.)

6 - Click **OK** on the confirmation form. The topic you selected has been deleted.

# MONITORING FORUM ACTIVITY

## E-MAIL NOTIFICATIONS

If you are subscribed to a discussion forum, you will be periodically sent e-mail with a summary of recent activity in that discussion forum, as in the following example:



### Advantages:

- You can be notified immediately of new activity.
- You are provided with a summary of the post and a link to it.
- You can reply to discussion entries using e-mail.

### Disadvantages:

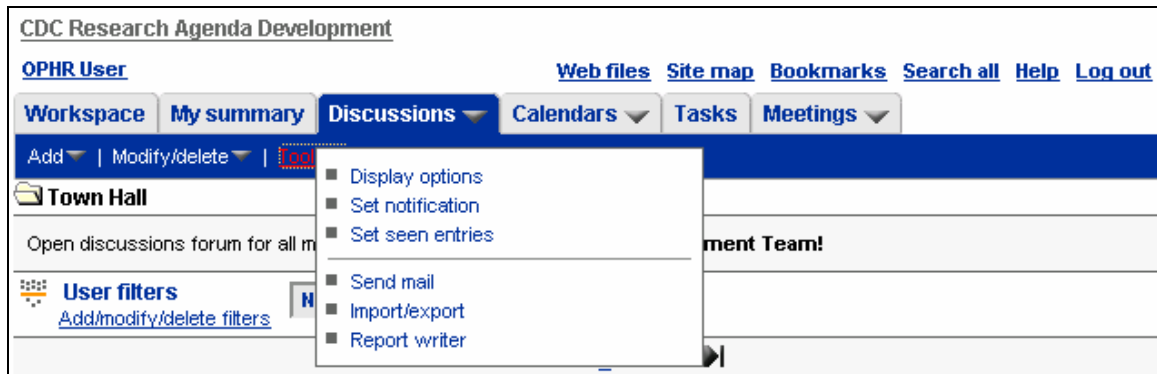
- You will be unaware of new activity until you check your e-mail.
- Highly active forums may flood your e-mail inbox or produce lengthy activity summaries.
- You may be interrupted while doing other work.



## Configuring e-mail notification

The manager of a forum may include your username in the *distribution list for notifications of forum activity*. To override the manager's settings or to ensure that you receive notifications for a particular discussion:

1. From within the discussion forum, click on the Tools menu.



2. Choose **Set Notification** from the menu. Forum displays the "Notification for..." page.

### Notification for OPHR User

You can choose to receive notification of new entries in this forum, "Town Hall" by email. Mail notifications are sent to the email address specified in your personal profile.  
Note: Mail notifications are sent out according to the schedule set by the moderator.

---

#### Email Notification

**Use Forum default e-mail notification**  
You will receive mail notification of new entries at the discretion of the Forum Administrator.

**Disable e-mail notification**  
You will not receive mail notification of new entries if you check this box.

**Enable e-mail notification (digest style)**  
You will receive mail notification of new entries if you check this box. New entries will be in digest form, all in one message. You will not receive attachments to Forum postings.

**Enable e-mail notification (individual message style)**  
You will receive mail notification of new entries if you check this box. New entries will be sent individually, one entry per mail message. You will receive attachments to Forum postings.

---

3. Select from among the following options:

- **Use Forum Default E-mail Notification.** Before you can receive e-mail notifications, your manager must add your username, or the name of a group to which you belong, to the discussion distribution list.
- **Disable E-Mail Notification.** If you disable e-mail notification for this discussion, this setting overrides settings made by the discussion-forum manager. So, if your name is on the discussion distribution list, but you check this box, you do not receive e-mail notifications.
- **Enable E-Mail Notification (Digest Style).** This option allows you to receive a summary e-mail message according to a schedule set by your discussion-forum manager. You receive one e-mail message with summaries of all activities in the discussion forum since the last time you received a notification. This setting overrides settings made by the discussion-forum manager.
- **Enable E-Mail Notification (Individual Message Style).** According to a schedule set by your discussion-forum manager, you receive an e-mail message for every new or modified entry. The e-mail message also includes any files attached to the entry. This setting overrides settings made by the discussion-forum manager.

4. Click **OK**.

E-mail notifications contain links to one or more new or modified entries. When you click on the link in the e-mail message, it displays the entry in the browser window.

## **TRACKING PAGES**

### **The "My summary" page**

This page lists the number of updates made to discussion forums you opted to track. It also lists scheduled activities for the current day.

#### **Advantages:**

- Overview of activity across all workspaces
- Multiple views of activity possible
- Fast navigation to items of interest
- Includes scheduled activities for the current day.

#### **Disadvantages:**

- You will be unaware of new activity until you check this page.
- Page does not include details of discussion activity

**CDC Research Agenda Development**

**OPHR User** [Web files](#) [Site map](#) [Bookmarks](#) [Search all](#) [Help](#) [Log out](#)

**Workspace** **My summary** **Discussions** **Calendars** **Tasks** **Meetings**

[User profile](#) | [List users](#) | [Wizards](#) | [Preferences](#) | [List unseen](#) | [Send mail](#) | [Hide message](#)

**Discussions and document-sharing forums**

New entries	Forum name	New entries	Forum name
<a href="#">0</a>	<a href="#">CDC Team User Guides and Tutorials</a>	<a href="#">0</a>	<a href="#">Health Equity Champions</a>
<a href="#">7</a>	<a href="#">Background Materials</a>	<a href="#">0</a>	<a href="#">Health Information and Services</a>
<a href="#">0</a>	<a href="#">Community Preparedness and Response</a>	<a href="#">0</a>	<a href="#">Health Promotion</a>
<a href="#">0</a>	<a href="#">Environmental and Occupational Health and Injury Prevention</a>	<a href="#">0</a>	<a href="#">Infectious Disease</a>
<a href="#">0</a>	<a href="#">Global Health</a>	<a href="#">28</a>	<a href="#">Town Hall</a>

**Calendar: 28 Jan 2005** [Today](#) [This week](#) [This month](#)

When	Description	Where	Calendar
11:00 AM-1:00 PM	<a href="#">Infectious Diseases Workgroup Meeting</a>	TollFree Number: 866-711-0019; PASSCODE: 6504577	<a href="#">Research Agenda Calendar</a>
1:00 PM-2:00 PM	<a href="#">Health Information Services Workgroup Meeting</a>	Conference Call	<a href="#">Research Agenda Calendar</a>
1:00 PM-2:30 PM	<a href="#">Core Team meeting</a>	conference call OR (optional): Executive Park, Bldg 33, small conference room, Atlanta	<a href="#">Research Agenda Calendar</a>
2:30 PM-4:00 PM	<a href="#">Global Health WG conference call</a>		<a href="#">Research Agenda Calendar</a>

**Tasks**

Task	Forum	Due date
No tasks are due within the past 20 days.		

**Forum eMeeting meetings**

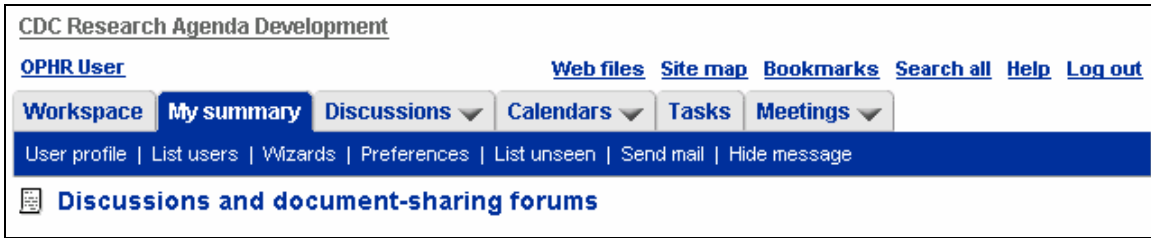
Time	Meeting	Description
<i>There are no scheduled Forum eMeeting meetings today.</i>		

## My Summary preferences

The "My summary" page provides concise information about the forums that are most important to you and your work. The page contains a count of the new or modified entries in the discussions that interest you. If your zone includes a large number of discussion forums, the "My summary" can save you time. You can keep track of any discussion that you can access in the zone.

In addition, you can specify that you want your page to display entries from selected calendars, scheduled chat sessions, tasks, and easy access to messaging.

The menubar on the "My summary" page allows you to view or modify your user profile, send e-mail, and more.



Because the "My summary" page is highly customizable, you need to set your preferences before you can begin using it.

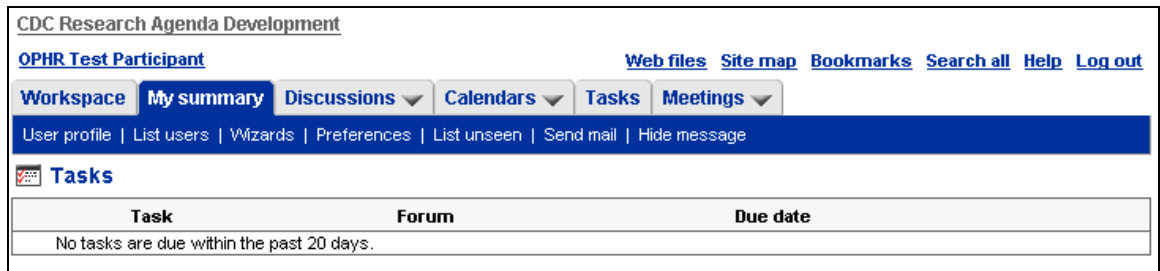
## Configure My Summary

The "My summary" page is designed to track only the forums that are important to you and your work. You need to specify which forums you want to track before the "My summary" page can display them.

To initialize or modify the settings for the "My summary" page:

1. Click on the "My summary" tab.

The "My summary" page appears. If you have not yet set your preferences, the page will be mostly empty, as below:



2. Click on the Preferences menu item.

The User Preferences page appears.

3. Select or clear any of the following checkboxes:
  - **Show the Summary page as the default zone home page** Select this to set the "My summary" page as the first page seen every time you log in.
  - **Show the selected discussion forums on the summary page** Select this to track discussion forums, and then select each discussion forum you want to track. The list of discussion forums is organized by workspace. By default, all discussion forums that you can access are

selected. If not selected, the discussion-tracking section will be removed from the "My summary" page.

**User preferences**

Return to the [CDC Research Agenda Development](#)

---

**Show the Summary page as the default zone home page**

---


 **Show the selected discussion forums on the summary page**  
Clearing the box at left disables the display of all forums.  
[Select all](#) [Clear all](#) **Warning:** if you select all forums, the summary page may be slow to load.

**CDC Research Agenda Development**

- CDC Team Helpdesk
- CDC Team Virtual Classroom
- Sand Box
- Background Materials
- Community Preparedness and Response
- Environmental and Occupational Health and Injury Prevention
- Global Health
- Health Equity Champions
- Health Information and Services
- Health Promotion
- Infectious Disease
- Jan 10th Orientation Materials
- Research Agenda Core Team
- Research Agenda Steering Workgroup
- Town Hall
- Training Plan

- **Show today's calendar events from selected calendars** Select this to track calendar events, and then select each calendar that you want to track. The list of calendars that may be tracked is divided by workspace. By default, the "My summary" page displays calendar appointments for the current day. If you deselect this, the calendar section is removed from the "My summary" page.
- **Show the Tasks summary** Click on this checkbox to have the "My summary" page track tasks that are assigned to you.
- **Show the meeting summary for the selected meetings and chat rooms** Click on the checkbox, and then select each chat room whose sessions you want to track. When you do this, the "My summary" page displays all of the chat sessions in that room that are scheduled for the current day.

- **Show the Messaging summary** Select this to enable access to messaging from the "My summary" page, including a list of the users who are currently "listening" for messages from other users.

 **Show today's calendar events from selected calendars**  
Clearing the box at left disables the display of all calendars.  
[Select all](#) [Clear all](#) **Warning:** if you select all calendars, the summary page may be slow to load.


**CDC Research Agenda Development**

Research Agenda Calendar


**Personal Calendar**

Calendar for OPHR User

---

 **Show the Tasks summary**

---

 **Show the meeting summary for the selected meetings and chat rooms**  
Clearing the box at left disables the display of all meetings and chat rooms.  
[Select all](#) [Clear all](#) **Warning:** if you select all meetings and chat rooms, the summary page may be slow to load.

**Meeting Servers**

Forum eMeeting meetings

**CDC Team**

Chat room

---

4. Click **OK**.

The "My summary" page appears, displaying the items you chose. To modify the settings, click on the Preferences menu item again, and change your selections.

CDC Research Agenda Development

OPHR User [Web files](#) [Site map](#) [Bookmarks](#) [Search all](#) [Help](#) [Log out](#)

**Workspace** | **My summary** | Discussions | Calendars | Tasks | Meetings

User profile | List users | Wizards | Preferences | List unseen | Send mail | Hide message

**Discussions and document-sharing forums**

New entries	Forum name	New entries	Forum name
<a href="#">0</a>	<a href="#">CDC Team User Guides and Tutorials</a>	<a href="#">0</a>	<a href="#">Health Equity Champions</a>
<a href="#">7</a>	<a href="#">Background Materials</a>	<a href="#">0</a>	<a href="#">Health Information and Services</a>
<a href="#">0</a>	<a href="#">Community Preparedness and Response</a>	<a href="#">0</a>	<a href="#">Health Promotion</a>
<a href="#">0</a>	<a href="#">Environmental and Occupational Health and Injury Prevention</a>	<a href="#">0</a>	<a href="#">Infectious Disease</a>
<a href="#">0</a>	<a href="#">Global Health</a>	<a href="#">28</a>	<a href="#">Town Hall</a>

**Calendar: 28 Jan 2005** [Today](#) [This week](#) [This month](#)

When	Description	Where	Calendar
11:00 AM-1:00 PM	<a href="#">Infectious Diseases Workgroup Meeting</a>	TollFree Number: 866-711-0019; PASSCODE: 6504577	<a href="#">Research Agenda Calendar</a>
1:00 PM-2:00 PM	<a href="#">Health Information Services Workgroup Meeting</a>	Conference Call	<a href="#">Research Agenda Calendar</a>
1:00 PM-2:30 PM	<a href="#">Core Team meeting</a>	conference call OR (optional): Executive Park, Bldg 33, small conference room, Atlanta	<a href="#">Research Agenda Calendar</a>
2:30 PM-4:00 PM	<a href="#">Global Health WG conference call</a>		<a href="#">Research Agenda Calendar</a>

**Tasks**

Task	Forum	Due date
No tasks are due within the past 20 days.		

**Forum eMeeting meetings**

Time	Meeting	Description
<i>There are no scheduled Forum eMeeting meetings today.</i>		

## Viewing current appointments

By default, the "My summary" page displays calendar appointments for the current day. To display appointments for the current week:

1. On the "My summary" page, locate the Calendar row.
2. Locate the Today and This week links in the Calendar row.

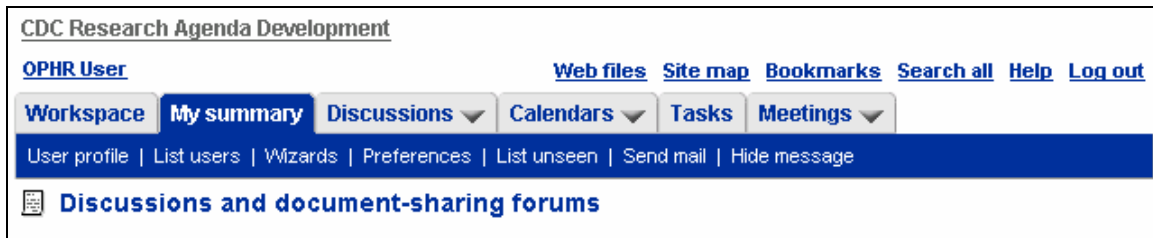
The *Today* link has a green arrow to its left, indicating that it is active. The *This week* link is inactive.

3. Click on the *This week* link.

The *My summary* page displays appointments for the current week. The green arrow now appears to the left of the *This week* link.

## REVIEWING UNSEEN ITEMS

When viewing a discussion forum, you can click on the Next Unseen menu item to view new or modified entries (from the oldest to the most recently created or modified), or you can click on the List Unseen menu item to see a list of these entries. The "List unseen" feature also appears on a workspace page.



The screenshot shows the top navigation area of the CDC Research Agenda Development workspace. At the top left, it says "CDC Research Agenda Development". Below that, the user is identified as "OPHR User". To the right of the user name are links for "Web files", "Site map", "Bookmarks", "Search all", "Help", and "Log out". Below these links is a row of menu items: "Workspace", "My summary", "Discussions", "Calendars", "Tasks", and "Meetings". The "Discussions" menu item is expanded, showing a sub-menu with "User profile", "List users", "Wizards", "Preferences", "List unseen", "Send mail", and "Hide message". Below the sub-menu is a link for "Discussions and document-sharing forums".

### Advantages:

- View complete entry, not just summary
- View all changes individually

### Disadvantages:

- You do not know of new activity unless you view each discussion forum separately.
- You may review new and changed entries that you are not interested in, which can be time-consuming in large discussion forums.



The screenshot displays the 'CDC Research Agenda Development' user interface. At the top, it identifies the user as 'OPHR User' and provides navigation links for 'Web files', 'Site map', 'Bookmarks', 'Search all', 'Help', and 'Log out'. Below this is a menu bar with tabs for 'Workspace', 'My summary', 'Discussions', 'Calendars', 'Tasks', and 'Meetings'. A blue bar indicates the user's profile and 'Wizards'. The main content area is titled 'Unseen entries' and includes a link to 'List titles of unseen entries'. It features two expandable sections: 'CDC Team' and 'Solutions'. The 'CDC Team' section lists several discussion forums with counts: CDC Team Helpdesk (8), CDC Team User Guides and Tutorials (0), Manager tutorial (0), Training materials (0), User Registration (0), User tutorial (0), and Chat room (0). The 'Solutions' section is expanded to show a list of discussion forums: CDC Team Helpdesk (8), CDC Team User Guides and Tutorials (0), Background Materials (7), Community Preparedness and Response (0), Environmental and Occupational Health and Injury Prevention (0), Global Health (0), Health Equity Champions (0), Health Information and Services (0), Health Promotion (0), Infectious Disease (0), Jan 10th Orientation Materials (0), Research Agenda Core Team (0), Research Agenda Steering Workgroup (0), Town Hall (28), and Training Plan (0).

## List Unseen and Next Unseen

The top section of the "My summary" page displays counts of new or modified entries that you have not yet seen for each of the discussions you specified in your preferences. When a number signifies to you that there has been significant new activity in a discussion, you can view a list of the new or modified entries for that discussion.

To view a list of new or modified entries for one discussion on the "My summary" page:

1. Click on the "My summary" tab.
2. In the top section of the "My summary" page, review the counts of new activity in the discussion forums.

Counts of new activity are located in the "New entries" column, and the titles of the discussions are located in the "Forum name" column.

CDC Research Agenda Development

OPHR User [Web files](#) [Site map](#) [Bookmarks](#) [Search all](#) [Help](#) [Log out](#)

Workspace **My summary** Discussions Calendars Tasks Meetings

User profile | List users | Wizards | Preferences | List unseen | Send mail | Hide message

**Discussions and document-sharing forums**

New entries	Forum name	New entries	Forum name
0	<a href="#">CDC Team User Guides and Tutorials</a>	0	<a href="#">Health Equity Champions</a>
7	<a href="#">Background Materials</a>	0	<a href="#">Health Information and Services</a>
0	<a href="#">Community Preparedness and Response</a>	0	<a href="#">Health Promotion</a>
0	<a href="#">Environmental and Occupational Health and Injury Prevention</a>	0	<a href="#">Infectious Disease</a>
0	<a href="#">Global Health</a>	28	<a href="#">Town Hall</a>

- Click on the number to the left of the title of a discussion with significant new activity.

Forum displays a list of the unseen entries (entries you have not seen yet) in that discussion forum.

CDC Research Agenda Development

OPHR User [Web files](#) [Site map](#) [Bookmarks](#) [Search all](#) [Help](#) [Log out](#)

Workspace My summary **Discussions** Calendars Tasks Meetings

Add | Modify/delete | Tools | Next unseen | List unseen | Search

**Town Hall**

Open discussions forum for all members to the **Research Agenda Development Team!**

**User filters**   
[Add/modify/delete filters](#)

1 2

Unseen	Number	Type	State	Task	Title	Replies	Author	Activity date
!	37.				<a href="#">Health Promotion List for Review_Feb 3 2005</a>		Kakoli Roy	02/03/05 02:26 PM
!	36.				<a href="#">Final Health Equity List for review</a>		Jamila Rashid	02/01/05 08:59 PM
!	34.				<a href="#">Statement of Supervisory Approval for Deputy Detail</a>		Elizabeth L Skillen	01/31/05 10:02 AM
!	29.				<a href="#">GLBTQ Research Agenda Ideas</a>		Jamila Rashid	01/27/05 06:54 PM
!	28.				<a href="#">Direction of CDC-Wide Research Agenda</a>		Robin Wagner	01/27/05 04:15 PM

- Click on the title of an entry you wish to view.

The entry appears.

- Use the List unseen menu item to view remaining unseen entries.

If the list contains more than one page of unseen entries, then, at the bottom of the page, you can click on the number of the page you wish to see, or you can click on the Next link to view the next page of unseen entries.

6. When you have reviewed all of the entries you wish to view, then, in the "Mark entries seen" row at the bottom of the page, click on Select all, then click on the OK button.

Forum marks all of the remaining entries as "seen," even though you did not view them. (Do this to entries that do not interest you.)

As another option, when viewing a long list of unseen entries, you can remove entries from the list by clicking on the checkboxes next to entries you do not wish to see. In the *Mark entries seen* row, make sure the *checked entries* radio button is on, and then click **OK**. Forum removes those entries from the list, making the list of remaining unseen entries more manageable.

**CDC Research Agenda Development**

**OPHR User** [Web files](#) [Site map](#) [Bookmarks](#) [Search all](#) [Help](#) [Log out](#)

**Workspace** **My summary** **Discussions** **Calendars** **Tasks** **Meetings**

Add | Modify/delete | Tools | Next unseen | List unseen | Search

Item	Workflow state	Title	Replies	Author	Activity date
<a href="#">Town Hall</a>					
<input type="checkbox"/>	!	<a href="#">34.</a> <a href="#">Statement of Supervisory Approval for Deputy Detail</a>		Elizabeth L Skillen	01/31/05 10:02 AM
<input type="checkbox"/>	!	<a href="#">29.</a> <a href="#">GLBTQ Research Agenda Ideas</a>		Jamila Rashid	01/27/05 06:54 PM
<input type="checkbox"/>	!	<a href="#">28.</a> <a href="#">Direction of CDC-Wide Research Agenda</a>		Robin Wagner	01/27/05 04:15 PM

**Mark entries seen** [Select all](#) [Clear all](#)

checked entries  all entries on this page  all entries

View entry number:   [Top of page](#)

## DOCUMENTS IN CDC TEAM

### EDIT A DOCUMENT

**When to use:** To make changes to a posted document. Version control is maintained by reserving the document so that no one else can be making changes at the same time.

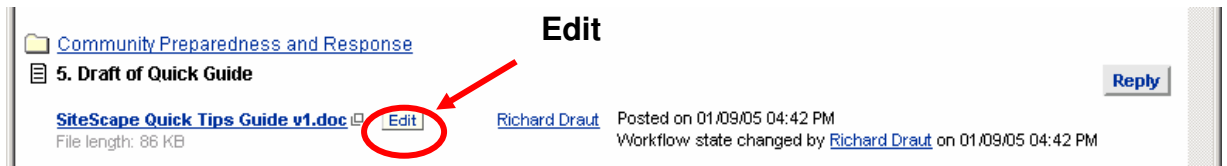
**How to Use:** Within a forum entry that contains a document, you may choose to use the **Edit** button, or you may manually reserve the document and download for editing.

- Manual Reserve/Release: If you do not have the Java editing plug-in installed, you must use the manual method (**See Appendix A: Enabling your browser to edit posted files for the details on the Java applet.**) If you plan to disconnect from the network while working on the document, you should use the manual method.
- Using the **Edit** button: Other than in the above cases, the **Edit** button is preferred. It automatically reserves the document and prompts for uploading and versioning. It requires fewer steps by the user.

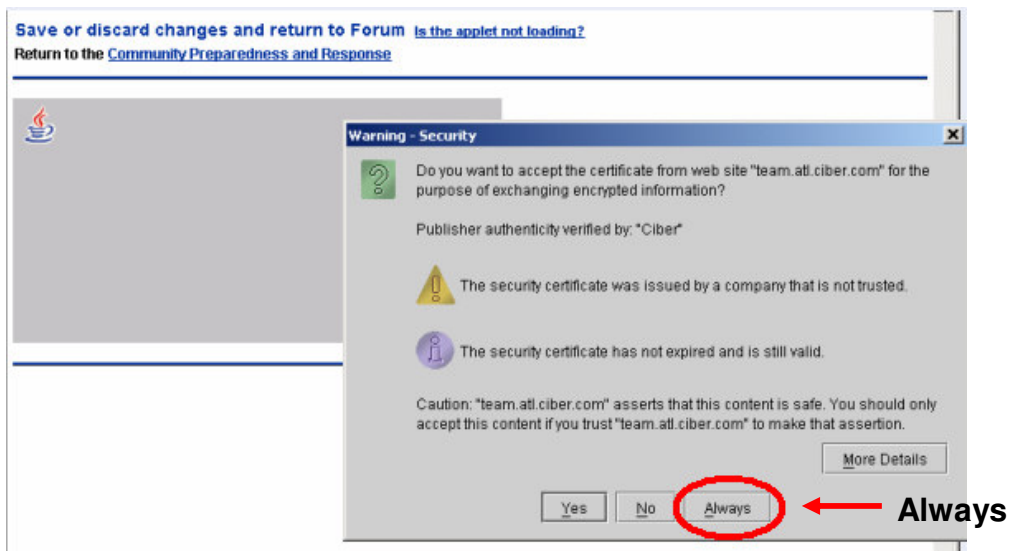
## EDIT A DOCUMENT USING THE EDIT BUTTON

(Note: the instructions given here are for Microsoft Word®, but you may use this feature in a similar fashion with Microsoft Excel, PowerPoint, Project, and Access, as well as WordPerfect® and Adobe PhotoShop®.)

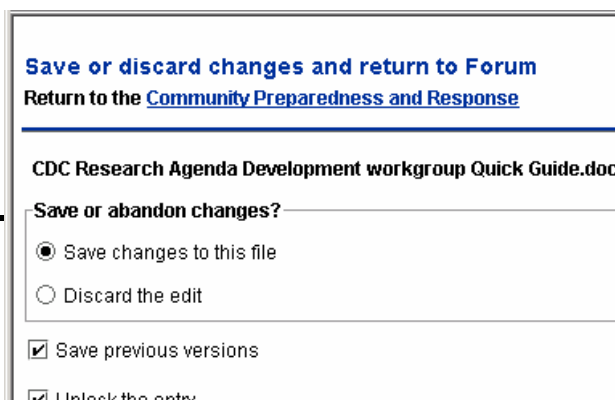
1. Click the **Edit** button.



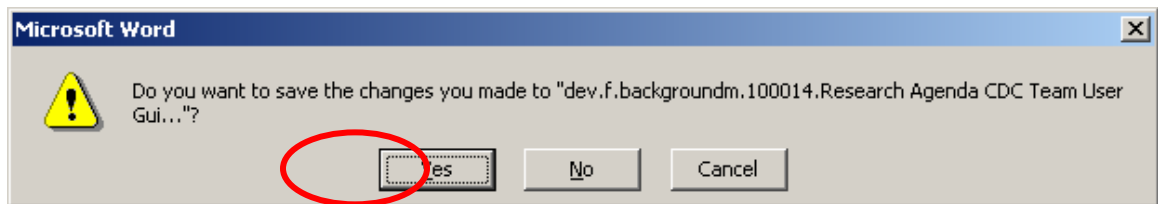
2. The applet will ask security permission to load. Click **Always**. Two such screens may be displayed.



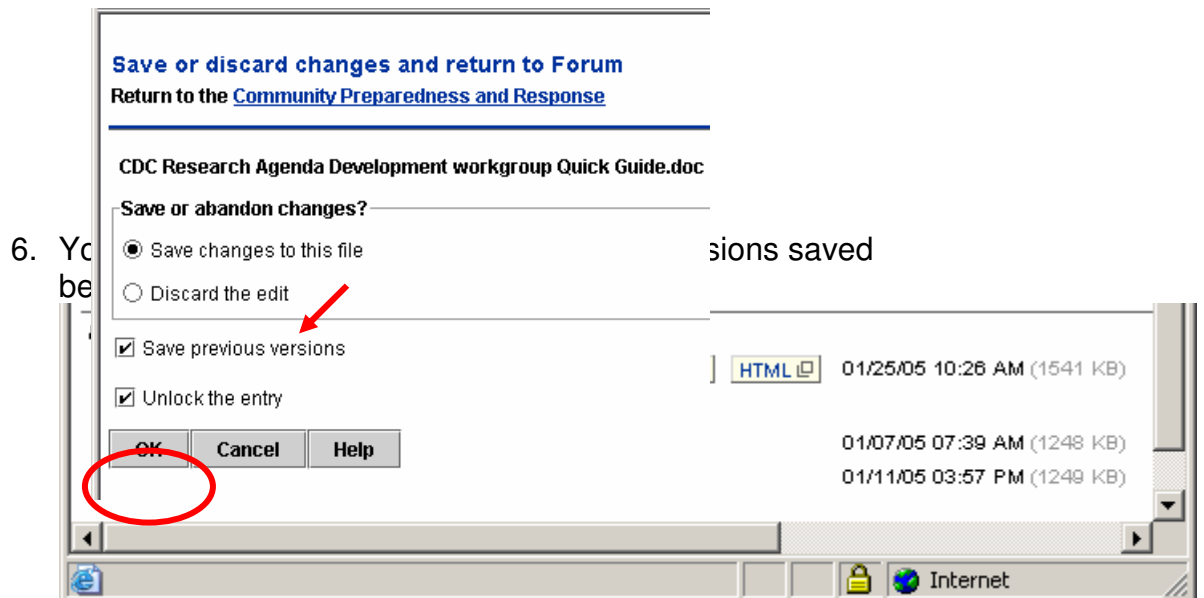
3. The document will load for you to edit. The window shown below will remain open waiting for you to complete your edits. Usually, it will be in the background underneath the document window. **TIP: Close unnecessary open applications and windows before editing a document. Be careful not to lose track of this window. You must return to it and click "OK" when you are finished editing or you may lose your edits.**



4. Edit the document. When finished, from the Word Menu bar click **File** then **Close**. On the confirmation screen click **Yes**.



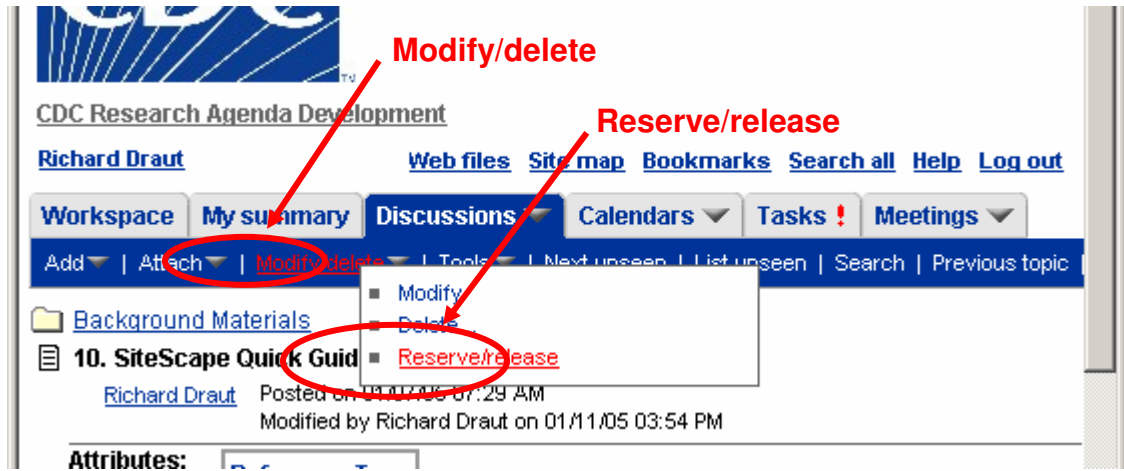
5. Click **Yes** on the Save Changes... screen. The default selections save the changes, keep older versions, and release the document so others can edit.



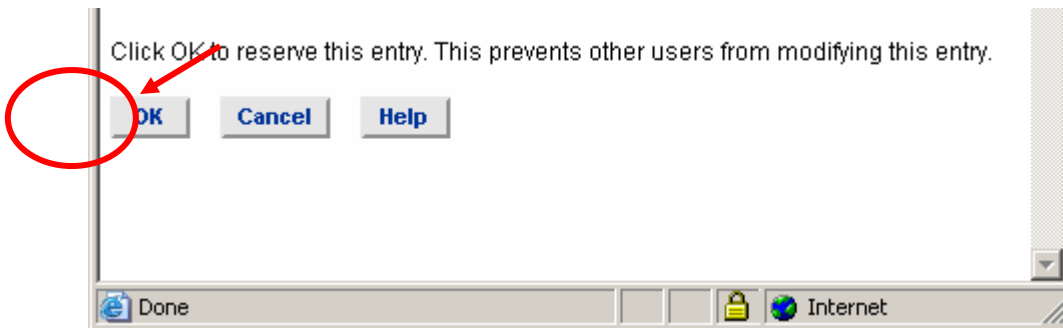
6. You be

## EDIT A DOCUMENT MANUALLY USING RESERVE/RELEASE

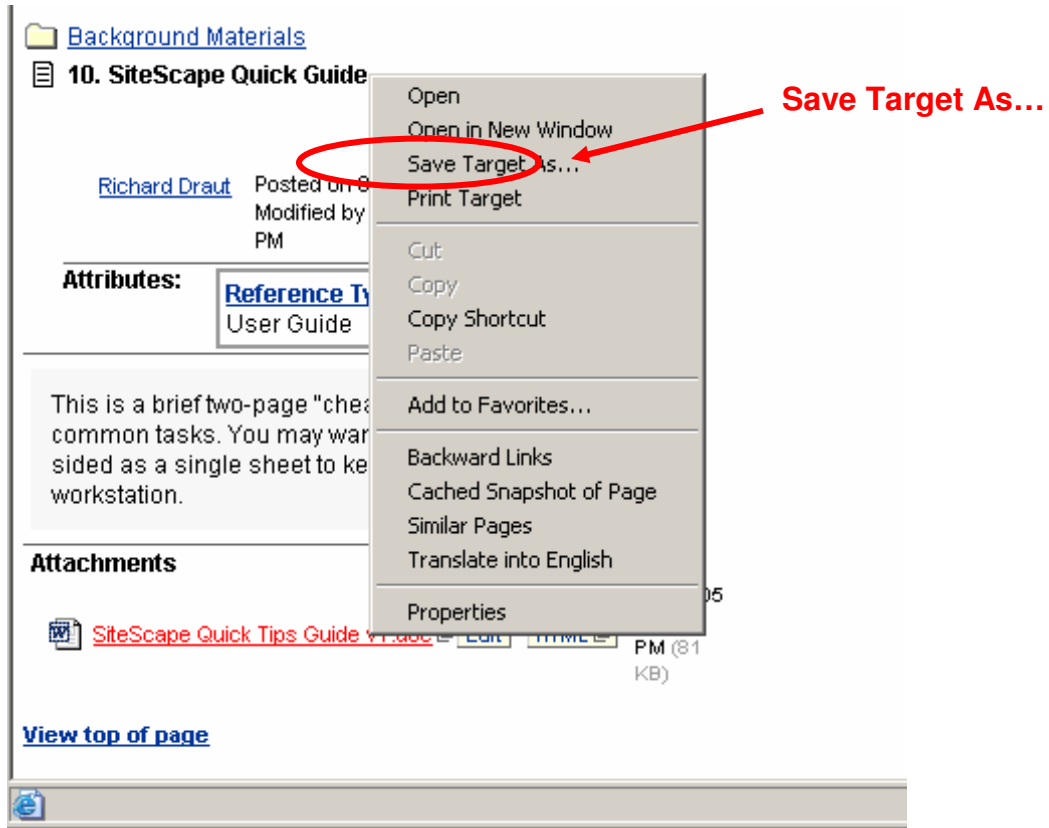
1. Click the **Modify/delete**, then **Reserve/release**.



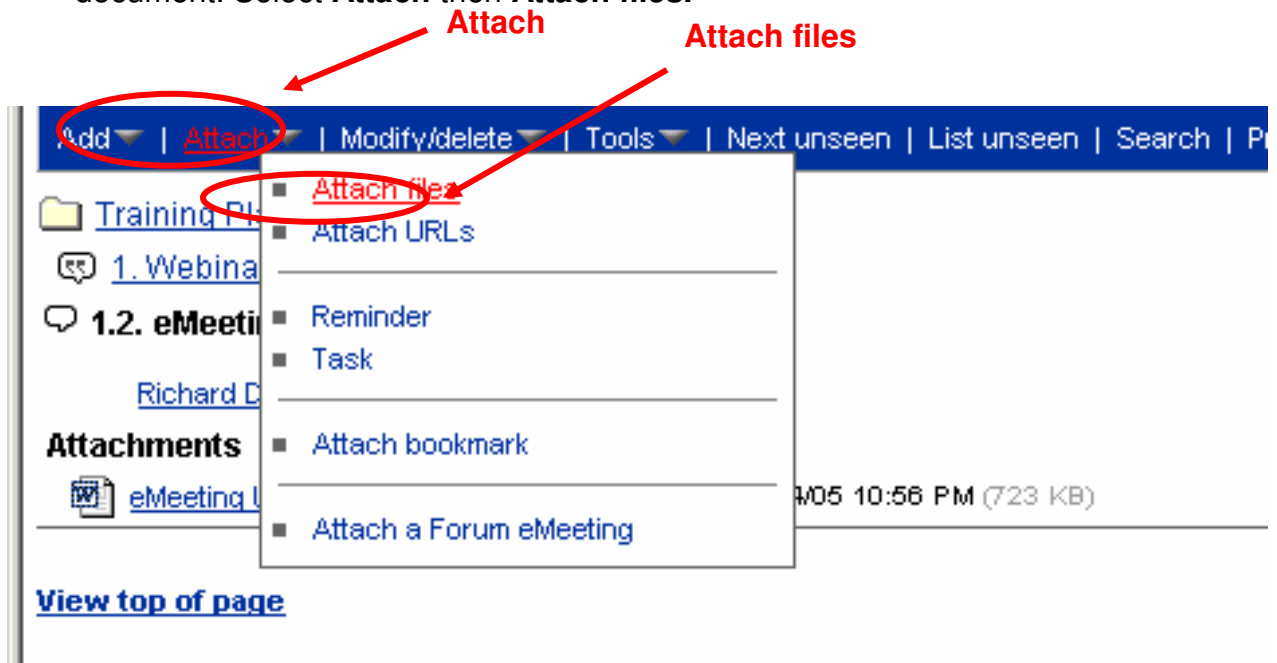
2. Click **OK** to reserve the entry.



3. Right-click on the document name and select **Save Target as...** Save the document. Open the document to make your edits. Save your changes.

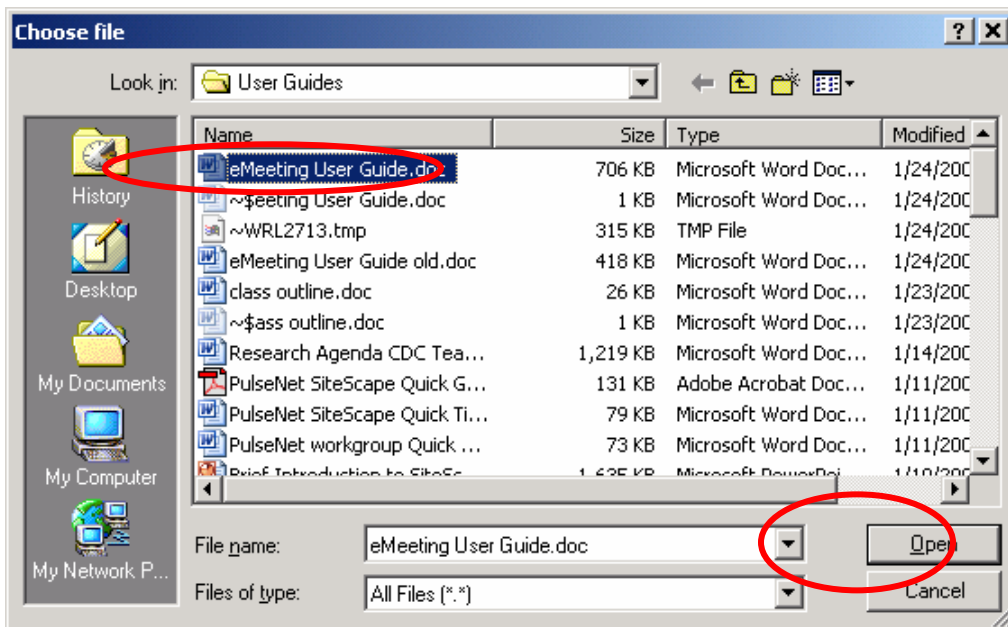
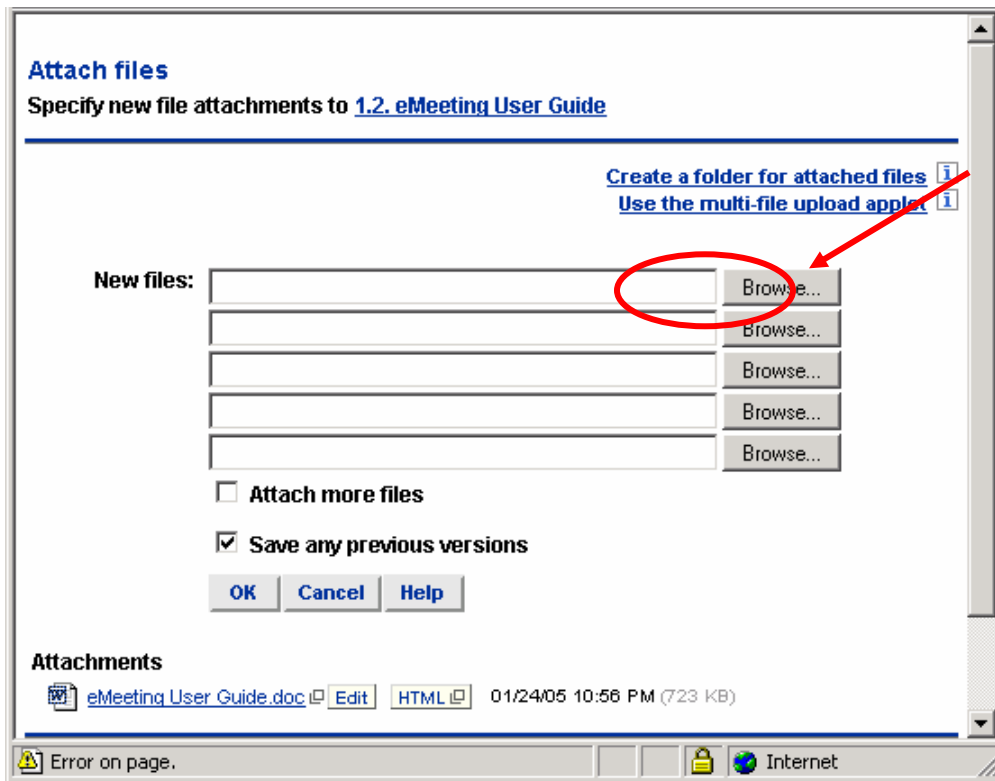


4. Next, return to the entry from which you downloaded the original document. Select **Attach** then **Attach files**.



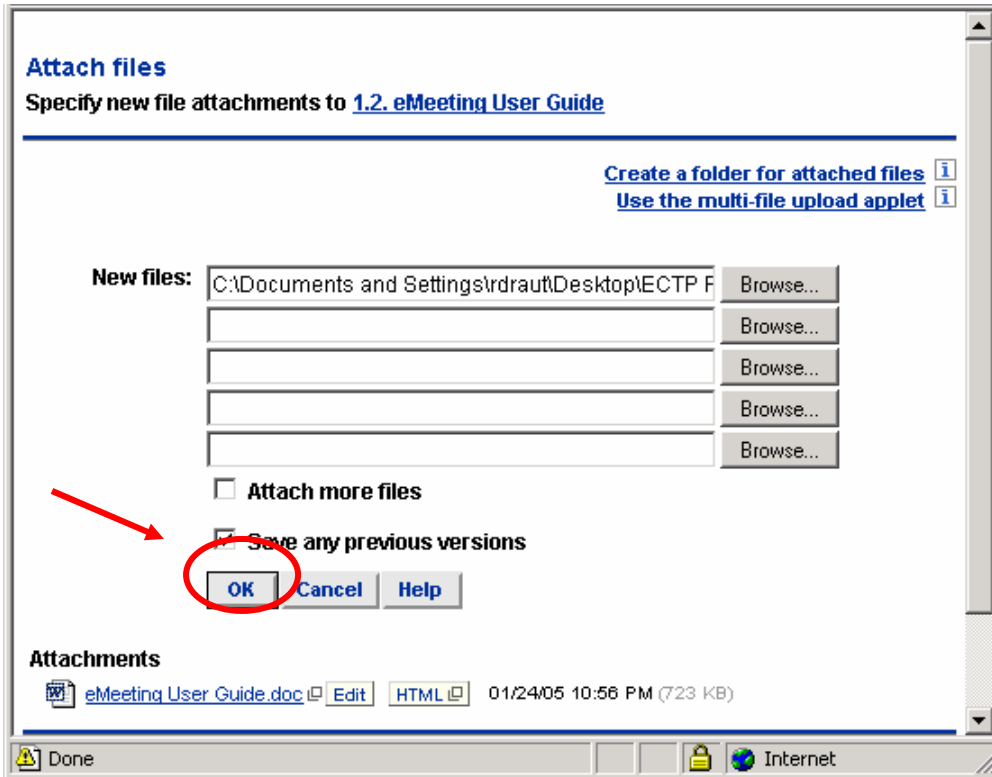


- When the Attach files screen appears, click browse to find the revised document you saved in Step 3.

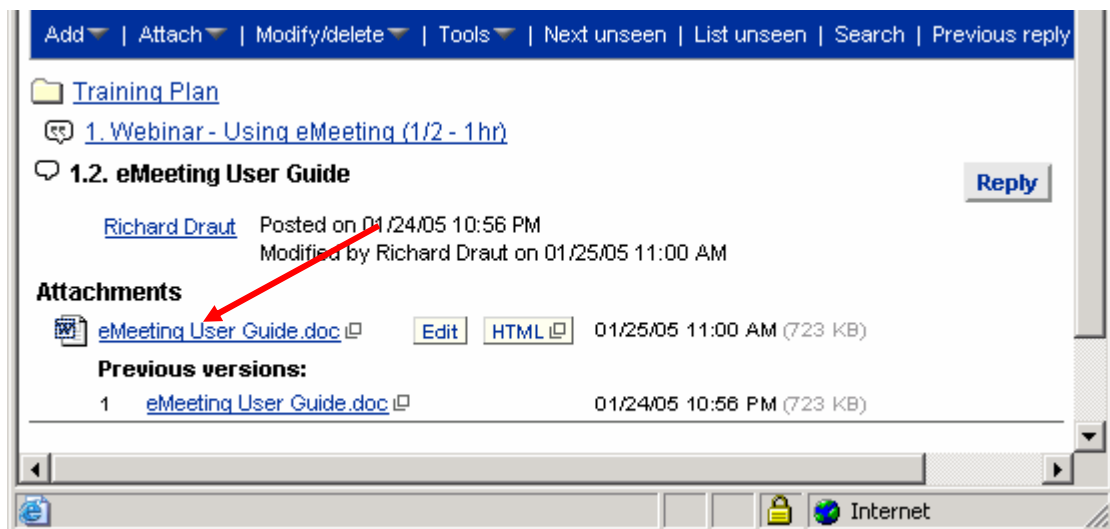


- Select the document and click **Open**.

7. Click **OK** to upload the new version. The default value is to save old versions.



**YOUR VERSION APPEARS AT THE TOP WITH OLDER VERSIONS SAVED BELOW.**



### Additional Note about Reserve/release

You can use **Reserve/release** to release documents that have been inadvertently locked.

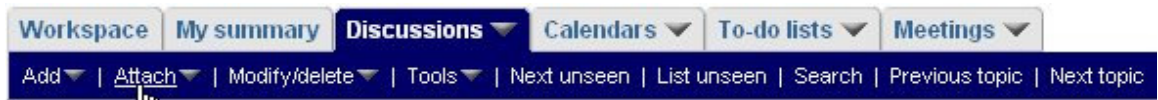
## DOWNLOADING AND SAVING DOCUMENTS FROM A DISCUSSION FORUM

### Transferring Multiple Documents

#### Uploading Documents

Within a forum entry you have the option to attach single or multiple documents at once. There are two ways to do this.

**Option 1:** Use the Attach button on the toolbar.





1. Click Attach
2. Click Attach Files
3. Search for files one at a time using the browse buttons in the form method
4. Click OK when finished

#### Attach files

Specify new file attachments to [11.Practice posting documents](#)

---

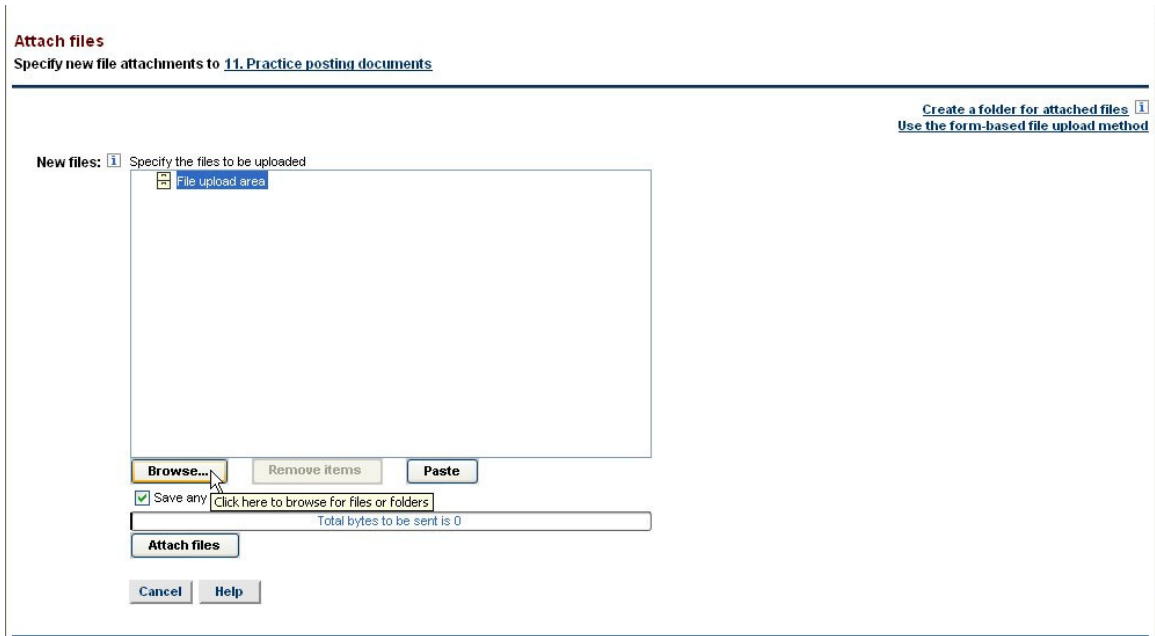
[Create a folder for attached files](#)   
[Use the multi-file upload applet](#) 

New files:    
   
   
   
   
 Attach more files   
 Save any previous versions

New URL:

---

5. **OR** Click 'Use the multi-file upload applet' link on the right of the screen.



6. Click the Browse button to search for and select files from your computer
7. Make sure 'Save Any Previous Versions' is checked
8. When you have selected all your files click Attach Files



9. The files you have uploaded will appear in the discussion thread

The screenshot shows the CDC Team web interface. At the top is a blue header with the 'CDC Team' logo. Below the header, the user 'Denise Williams' is logged in. The main navigation bar includes 'Workspace', 'My summary', 'Discussions', 'Calendars', 'To-do lists', and 'Meetings'. A secondary navigation bar contains 'Add', 'Attach', 'Modify/delete', 'Tools', 'Next unseen', 'List unseen', 'Search', 'Previous topic', and 'Next topic'. The current page is a discussion forum titled '11. Practice posting documents'. The post was made by Denise Williams on 03/06/06 at 02:45 PM and was modified on 03/06/06 at 03:04 PM. Below the post is an 'Attachments' section with three options: 'Show file drag/drop box', 'Select files to download', and 'Download all files as a zip file'. Two files are listed: 'Draft Report Health EquityFinalDraft.doc' (131 KB) and 'Questions.doc' (21 KB), each with 'Edit' and 'HTML' options.

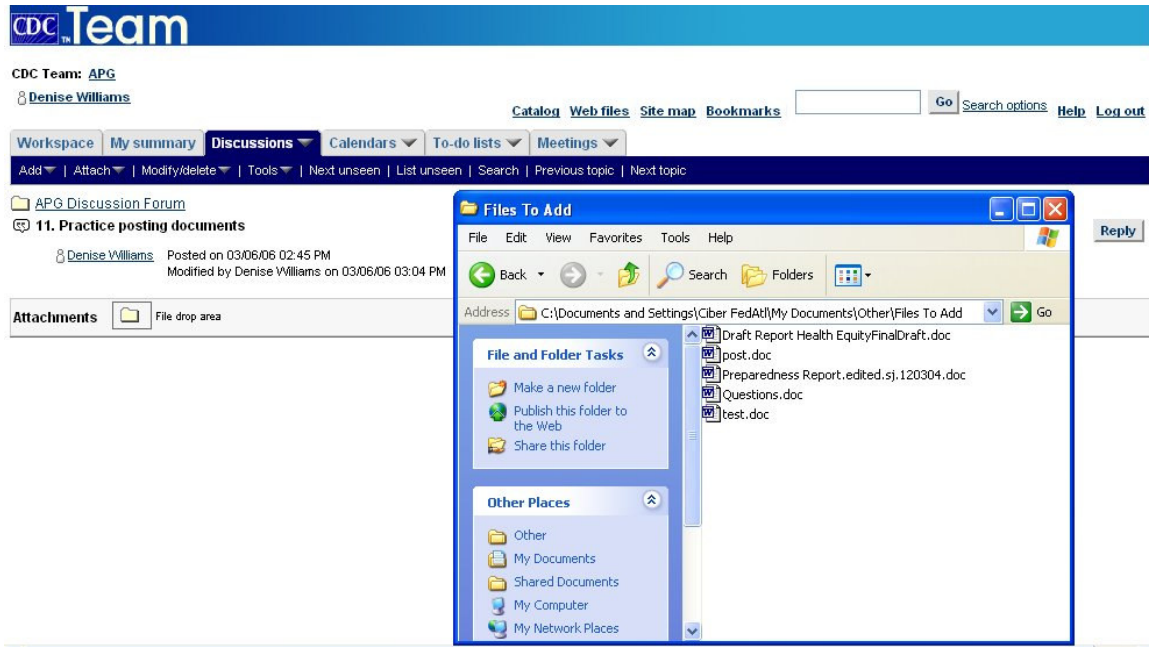
**Option 2:** Use the Show File Drag/Drop box towards the bottom of the screen



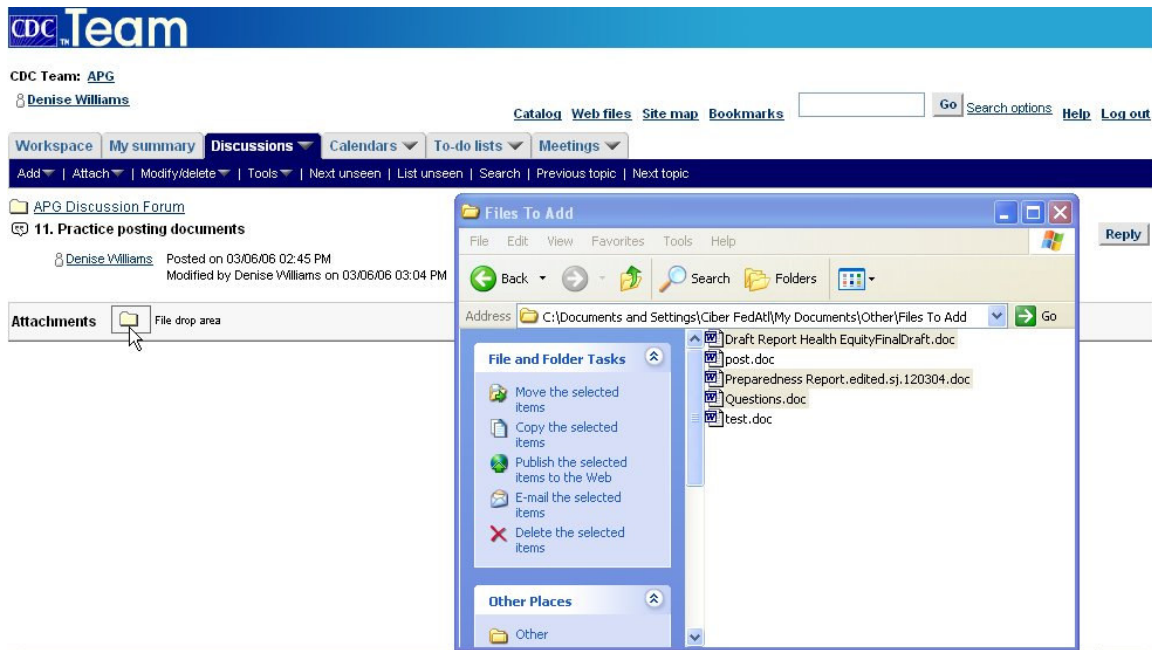
1. Click 'Show Files Drag/Drop Box'
2. The link will change to display a folder icon and text reading 'File drop area'



3. Search your computer for the files you would like to add



4. Select the files you would like to add and drag them to the folder icon



5. The files will appear in the discussion thread

The screenshot shows the CDC Team website interface. At the top, there is a blue header with the CDC logo and the word 'Team'. Below the header, the user is identified as 'Denise Williams'. There are navigation tabs for 'Workspace', 'My summary', 'Discussions', 'Calendars', 'To-do lists', and 'Meetings'. The 'Discussions' tab is selected. Below the tabs, there are links for 'Add', 'Attach', 'Modify/delete', 'Tools', 'Next unseen', 'List unseen', 'Search', 'Previous topic', and 'Next topic'. The main content area shows a discussion thread titled '11. Practice posting documents' in the 'APG Discussion Forum'. The thread is posted by Denise Williams on 03/06/06 at 02:45 PM and was modified on 03/06/06 at 03:04 PM. Below the thread, there is an 'Attachments' section with three options: 'Show file drag/drop box', 'Select files to download', and 'Download all files as a zip file'. The 'Select files to download' option is highlighted. Below this, there is a table of attachments:

Attachment Name	Actions	Date/Time	Size
Draft Report Health EquityFinalDraft.doc	Edit HTML	03/06/06 03:04 PM	(131 KB)
Questions.doc	Edit HTML	03/06/06 03:01 PM	(21 KB)

## Downloading Documents

After a document(s) have been posted to a discussion thread you will receive additional options for downloading the attachments to your computer when you are ready to work with them.

1. Click 'Select Files to Download'

This screenshot shows the same discussion thread as above, but with the 'Select files to download' dialog box open. The dialog box has a title bar that says 'Select the files to download'. It contains three checkboxes, each with a corresponding file name, date, and size:

File Name	Date/Time	Size
<input type="checkbox"/> Draft Report Health EquityFinalDraft.doc	03/06/06 03:41 PM	(128KB)
<input type="checkbox"/> Preparedness Report.edited.sj.120304.doc	03/06/06 03:41 PM	(2141KB)
<input type="checkbox"/> Questions.doc	03/06/06 03:41 PM	(20KB)

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons.

2. You will see a screen that will let you select files one at a time or all files at once

### Select the files to download

This screenshot shows the 'Select the files to download' dialog box with the 'Select all' button highlighted. The dialog box contains the same three file entries as in the previous screenshot:

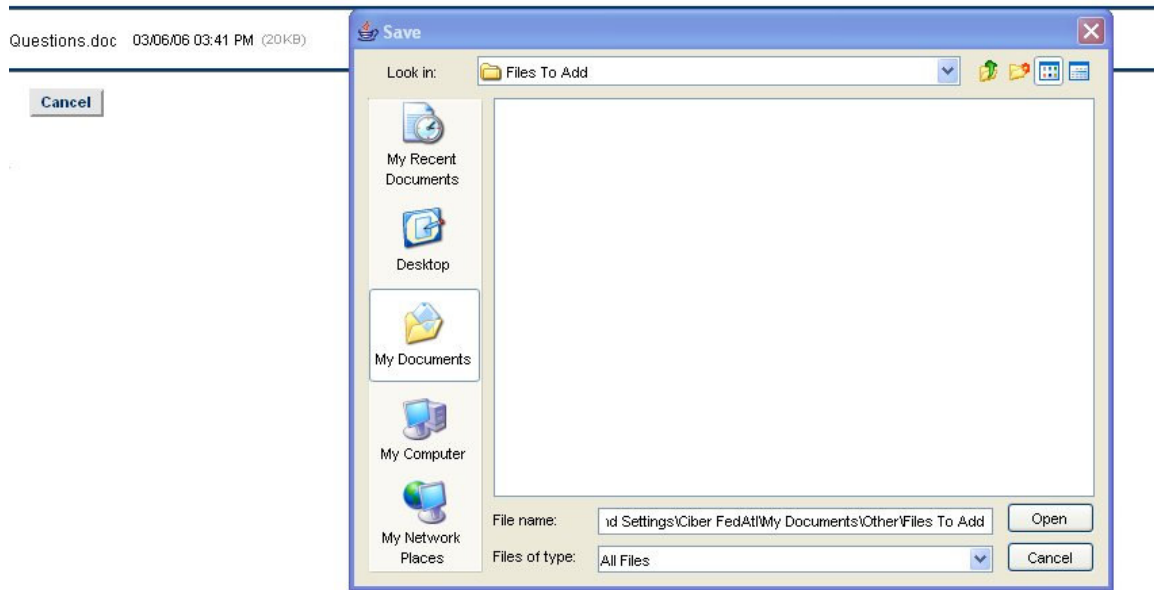
File Name	Date/Time	Size
<input type="checkbox"/> Draft Report Health EquityFinalDraft.doc	03/06/06 03:41 PM	(128KB)
<input type="checkbox"/> Preparedness Report.edited.sj.120304.doc	03/06/06 03:41 PM	(2141KB)
<input type="checkbox"/> Questions.doc	03/06/06 03:41 PM	(20KB)

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons.

3. Click OK after you have selected your files. You will see a Save box.



Downloading files...



4. Select the desired location for your files.

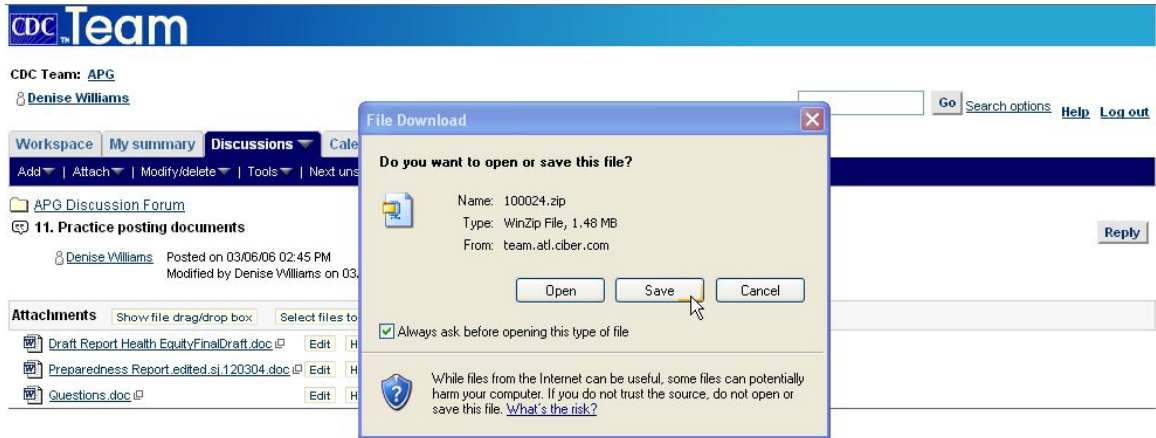
You also have the option to download all the attachments into a ZIP file.

1. Click 'Download all files as a zip file'

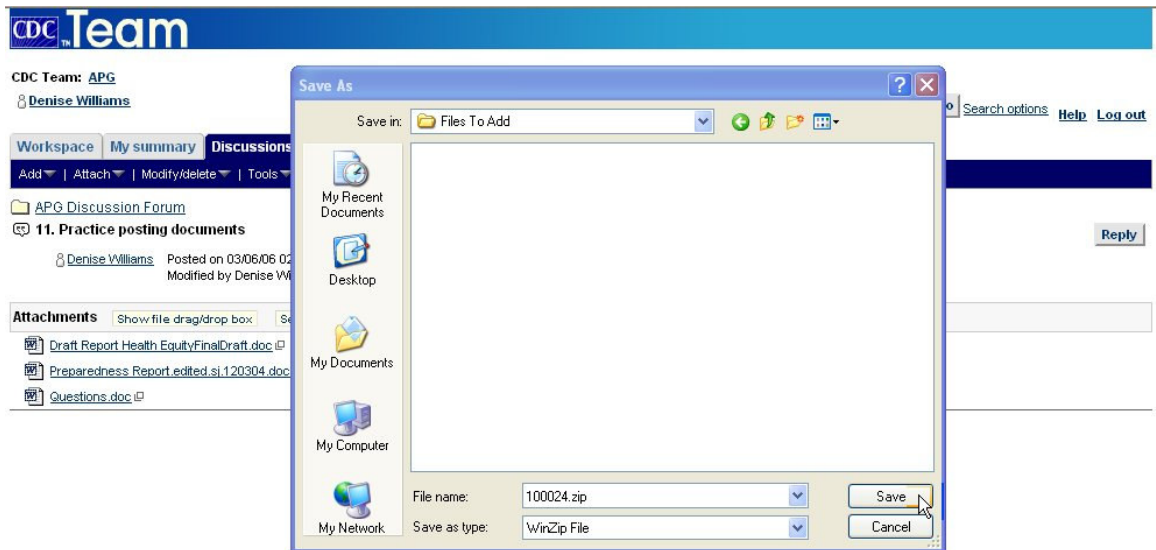


2. Click Save in the pop up box





3. Select the location to save the file and click Save

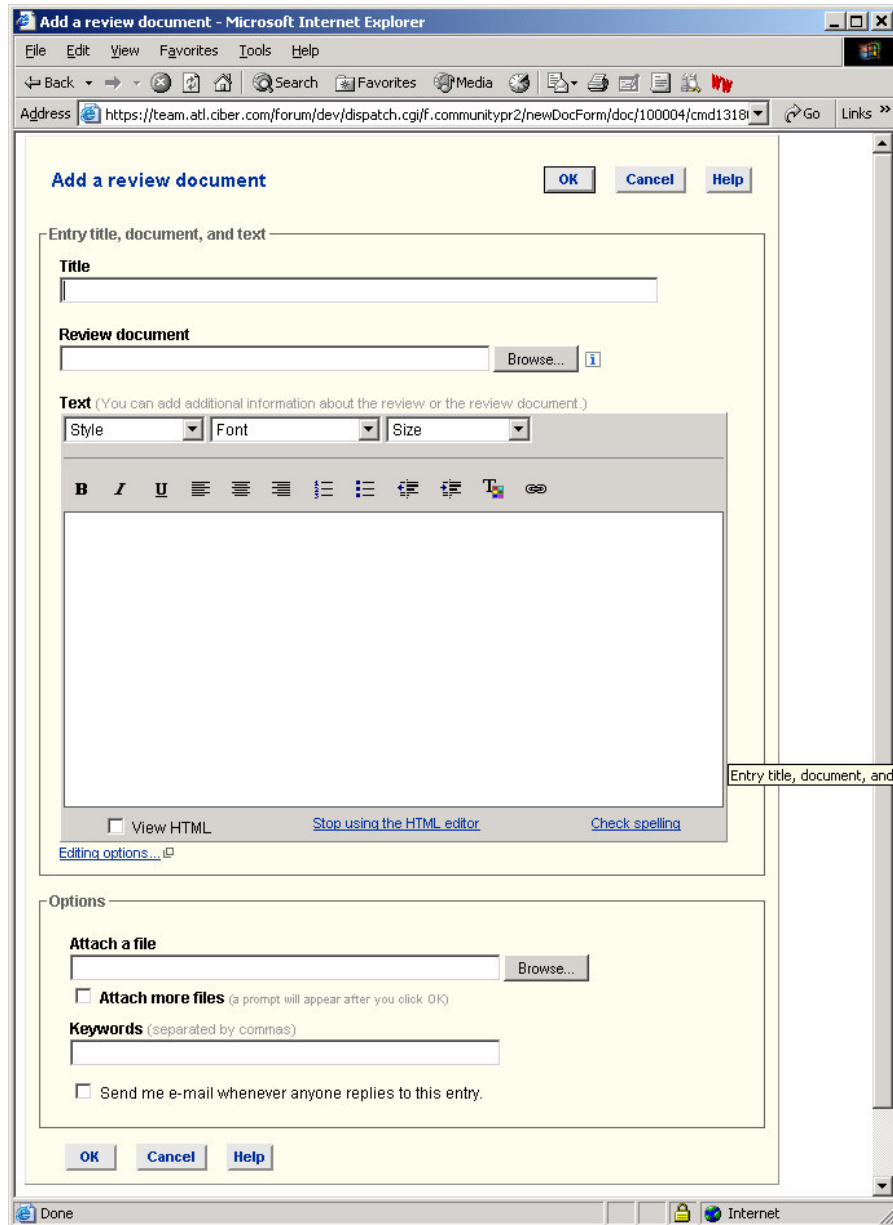


## ADD A REVIEW DOCUMENT

**When to use:** When a CDC Team user wants a small, select group of CDC Team users to review a document before it is made available for the larger audience.

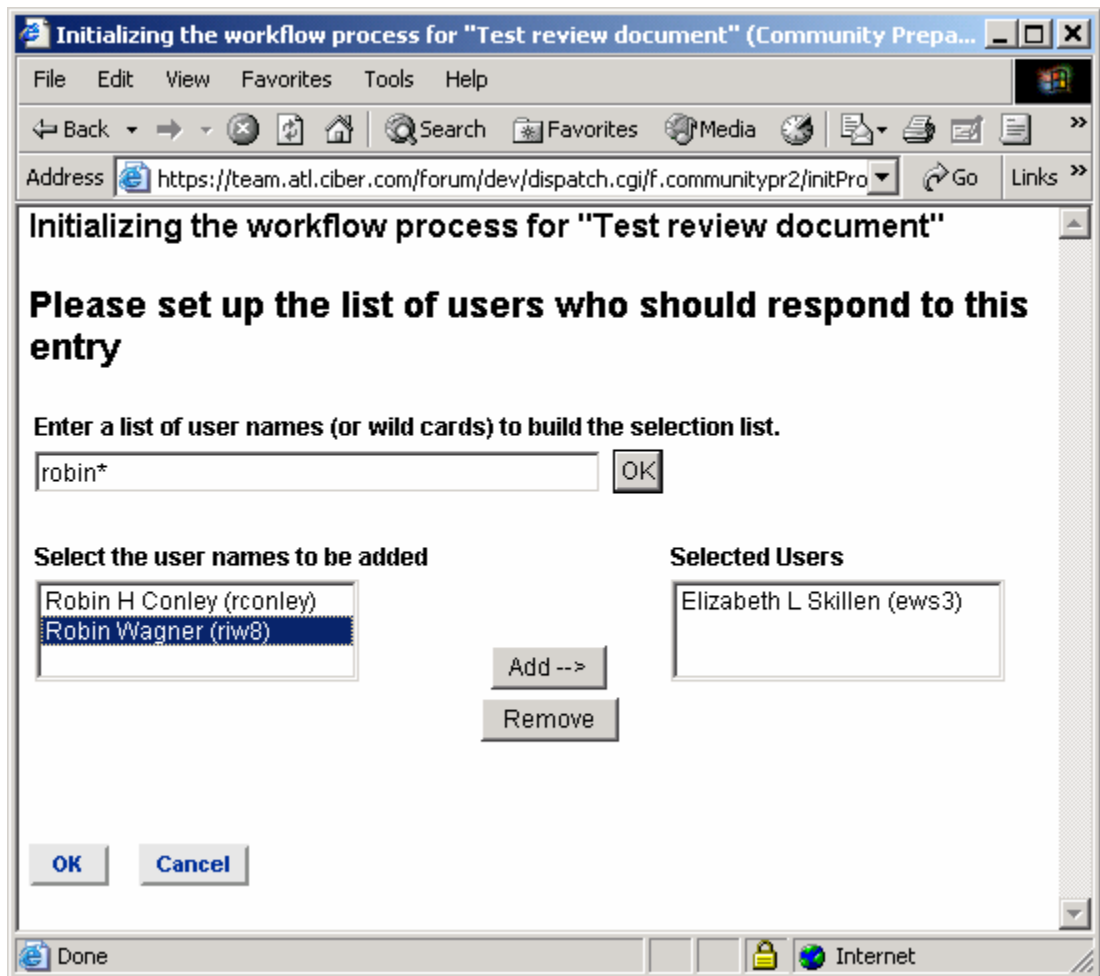
### How to use:

1. Within any Forum, click on the **Add** menu option
2. Click on the **Add review document** menu option
3. Once the Web form below is displayed, enter the title of your document into the **Title** text box



4. In the **Review document** text box, you can either enter the fully qualified file name, or click on the **Browse** button to pull up the **Choose file** Dialog box. In the **Choose file** dialog box, select the file that you want to have reviewed and click on the **Open** button. The fully qualified document name has now been added to the text box.
5. Enter additional description text into the **Text** box. (Note: You can use additional formatting options in the text box to highlight especially important passages, or to otherwise demonstrate additional importance to specific text.
6. In the **Attach a file** text box, you can place additional files within the Forum post. To do so, either enter the fully qualified file name, or click on the **Browse** button to pull up the **Choose file** Dialog box. In the

- Choose file** dialog box, select the file that you want to add and click on the **Open** button. The fully qualified document name has now been added to the text box.
7. For Keywords, enter any keywords that might appear in this document or forum post. This will allow other users to more quickly find this particular post when they do key word searches.
  8. Check the **Send me e-mail whenever anyone replies to this entry** option if you want CDC Team to send you an email (via Outlook) if anyone replies to this entry
  9. Click the **Ok** button

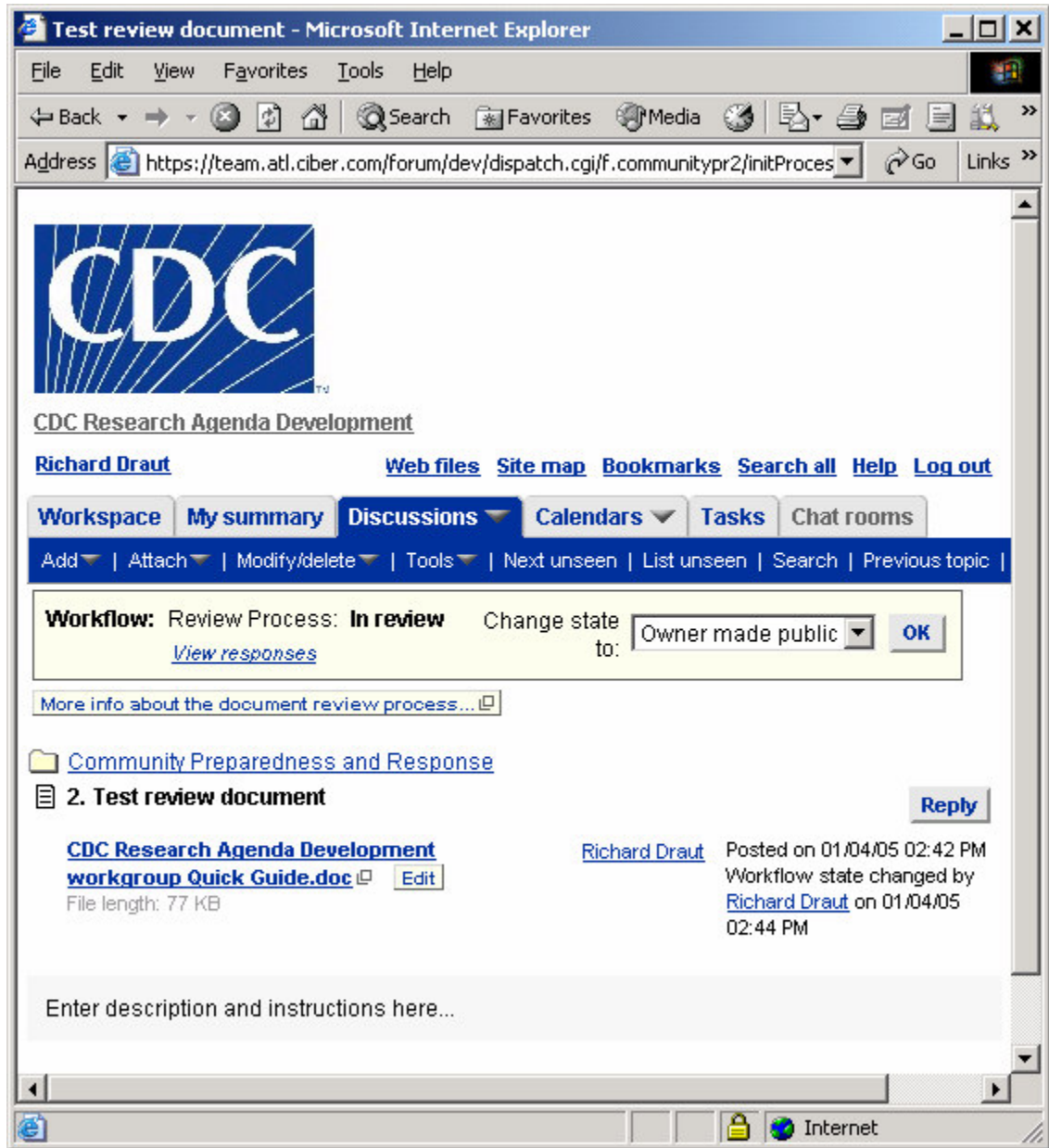


10. After clicking the **Ok** button, the web form above will be displayed. In the **Enter a list of user names (or wild cards) build the selection list** text box,

**Wildcard Tips:** the character wild card in CDC Team is an "\*", so entering just \* in the **Enter a list of user names (or wild cards) to build the selection list** text box will return all CDC Team users. To narrow the list,

you can enter in the first three letters of the CDC Team users name followed by an \*. So, for example, entering rob\* in **Enter a list of user names (or wild cards) to build the selection list** text box and clicking the **Ok** button will display a list of all CDC Team users named Rob, Robert, Robbie, Robin, Roberts, Robinson, etc.

11. Once the users have been displayed in the Text Box, select them by clicking on their name and then clicking on the **Add->>** button. To select multiple users at one time, hold down the Ctrl-Key and select each individual reviewer that you want to review this document. After highlighting the reviewers, click on the **Add->>** button, to add them to the list.
12. After selecting all of the reviewers that you want to review this document, click on the **Ok** button.
13. You will then be returned to the entry screen below. Meanwhile, all of the reviewers will receive an automatic email requesting they review the document, and containing a link directly to the document.



The document will not be 'visible' to the general audience until all reviewers have responded **Yes, I'm finished editing...** (see below), or until the document "Owner" makes the document public, presumably after the reviewers have posted their comments.

Those selected as reviewers, however, will see the document as it appears in the screen below. They each can view and edit the document. They will also see review process workflow information and options. See the screen below.

Respond to status question

CDC Research Agenda Development

Elizabeth L Skillen

Web files Site map Bookmarks Search all Help Log out

Workspace My summary Discussions Calendars Tasks Meetings

Add | Attach | Modify/delete | Tools | Next unseen | List unseen | Search | Previous topic | Next topic

Workflow: Review Process: **In review**

[View responses](#)

More info about the document review process...

Community Preparedness and Response

5. Draft of Quick Guide

[SiteScope Quick Tips Guide v1.doc](#) [Edit](#)

File length: 86 KB

Richard Draut Posted on 01/09/05 04:42 PM  
Workflow state changed by [Richard Draut](#) on 01/09/05 04:42 PM

Reply

See document status

See who is finished

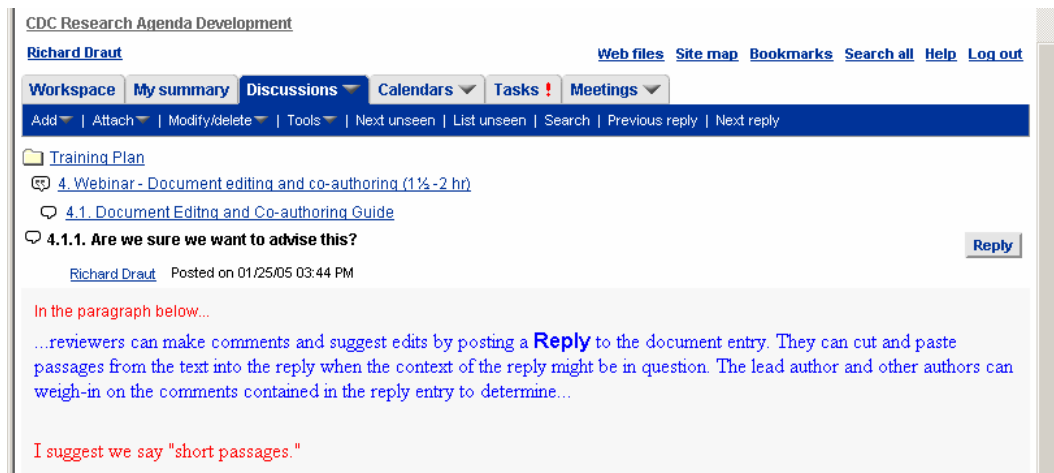
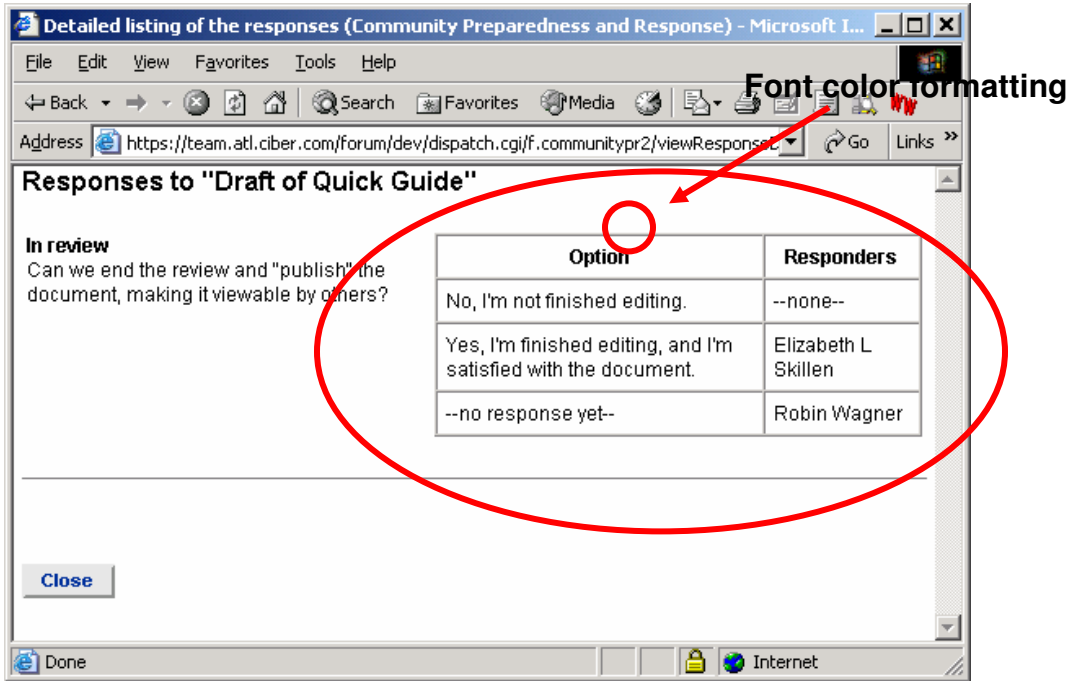
Edit the

Click **View responses** to show who has finished reviewing. Click **Close** when finished. Once everyone has responded **Yes, I'm finished...** the document will be viewable by all participants.

## Review a Document Using “Reply”

When a two or three co-authors are working on a document, using the **Edit** feature is very manageable. Each author makes edits or comments in the document, optionally using **Track Changes**, and the designated lead author reconciles the edits. However, if a larger number of people are collaborating on a document, it is far better to restrict users from changing the actual document. Instead, reviewers can make comments and suggest edits by posting a **Reply** to the document entry. They can cut and paste

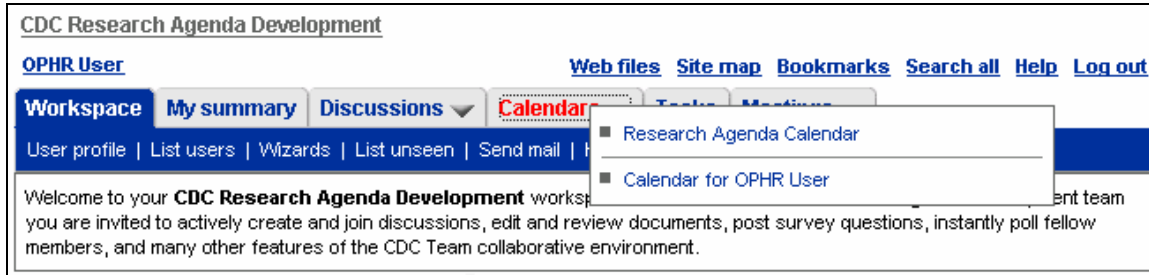
passages from the text into the reply when the context of the reply might be in question. The lead author and other authors can weigh-in on the comments contained in the reply entry to determine resolution. Then the lead author updates the document with the edits as resolved by the discussion.



## CALENDARS

### NAVIGATING CALENDARS

To view a calendar, simply click the Calendar tab, which will pop-up a list of available calendars, as in the graphic below. A dividing line separates workspace-related calendars from your personal calendar. The availability of workspace calendars is determined by the workspace in which you are currently. Once created, your personal calendar is always available.



There are four, calendar views from which you may choose: Today, Week, Month, and Year. The current view is indicated with a green arrow, as shown below. To switch views, simply click the view name.



When a calendar is opened, the current day is selected/highlighted. You may view another day by entering a date in the text boxes at the lower-right corner of the page and clicking the Go button, as pictured below. You can view calendar entries at any time, even after their date has passed.



To view additional details about a calendar entry, click on the entry title. A window pops up, displaying the complete entry. Actions that may be performed on the entry are presented across the bottom of the pop-up window.



## SCHEDULING APPOINTMENTS

Although you may add an entry in your personal calendar at any time, you might not have permission to create entries in other calendars.

To add an appointment to a calendar:

1. From the calendar, click on the Add entry menu item.

The "Add a calendar entry" form is displayed. You must enter the title, date, start time, and end time of the appointment. Entry of other information is optional.

2. By default, the appointment date will be for the day you are currently viewing. You may specify a different date using either drop-down lists or the calendar gadget/widget.
3. To enter the start time and end time, either use the drop-down lists or click the hyperlinks provided to quickly set the hour and quarter hour.

For an all-day event, click the “Set an all-day event” hyperlink. The words "All day" will appear as the Start time and End time.

**Add a calendar entry** [Submit entry](#) [Cancel](#) [Help](#)

Entry title, location, description

**Entry title**

**Location**

**Description**

---

Entry date & time

**Date** day month year or choose date from popup calendars: January February

**Start time** hour minutes or click to set a time:  
 : 

8AM	9AM	10AM	11AM	12PM	1PM	:00	:15
2PM	3PM	4PM	5PM	6PM	7PM	:30	:45

**End time** hour minutes or click to set a time:  
 : 

8AM	9AM	10AM	11AM	12PM	1PM	:00	:15
2PM	3PM	4PM	5PM	6PM	7PM	:30	:45


OR [Set an all-day event](#)

---

[More options](#)

[Submit entry](#) [Cancel](#) [Help](#)

- To add a repeating appointment, click “More options,” located near the bottom of the page. NOTE: The start date entered here will override/superscede the event date above / previously entered.


**Frequency** 

No repeat

Every  day(s)

Every  week(s) on  Sun  Mon  Tue  Wed  Thu  Fri  Sat

Every  month(s) on the

**Range** 

**Start date:**  day  month  year or choose date from popup calendars:

**End date options:**

Specific end date  day  month  year or choose date from popup calendars:

No end date

Repeat count:  occurrences

---

**Attachments**

Attach a link to this URL:  
URL

Attach a link to an existing forum entry  
You will be prompted to search for the entry when you submit this form.

Create an entry in another forum and then attach a link to it  
You will be prompted to create the entry when you submit this form.

5. Click Submit entry.

The calendar page reappears, displaying the new entry.

## EVENT NOTIFICATIONS

### Announcing an event / Inviting attendees


To invite others to an appointment, you must be either the appointment creator or the calendar owner.

To invite others:

1. From the calendar, click on the title of the appointment.

A smaller window appears, displaying the details of the appointment.

2. Click on the "Mail this entry" icon in the smaller window:

For illustration only: 

If this icon is not present, speak to your calendar manager about obtaining access to invite others to appointments.

The "Send a mail message" form appears, as illustrated below.

3. Use this form to specify the invitees to the appointment by entering their e-mail addresses, by selecting the user group to which they belong, or by entering their usernames. Be sure to include yourself as a recipient if you wish to have a record of this invitation. You can also make changes to the subject line and the body of the message.
4. Click OK.

A message appears, confirming that the invitations have been sent.

To return to the Calendars page, click Close.

### Send a mail message

#### Recipients

Add e-mail addresses (separate multiple addresses with commas):

OPHR User (gamiller@ciber.com)

#### Groups

--None--  
OPHR Research Agenda Participants

All groups    Groups in this workspace    Groups I belong to

[Rebuild group list](#)

#### Users (login names)

[Search for user names](#)

#### Message

##### Subject:

##### Message:

This calendar entry has been forwarded to you by  
Forum user OPHR User.

Calendar: Research Agenda Calendar

Description: SiteScape Training

[OK](#)

[Cancel](#)

## Notify of schedule changes

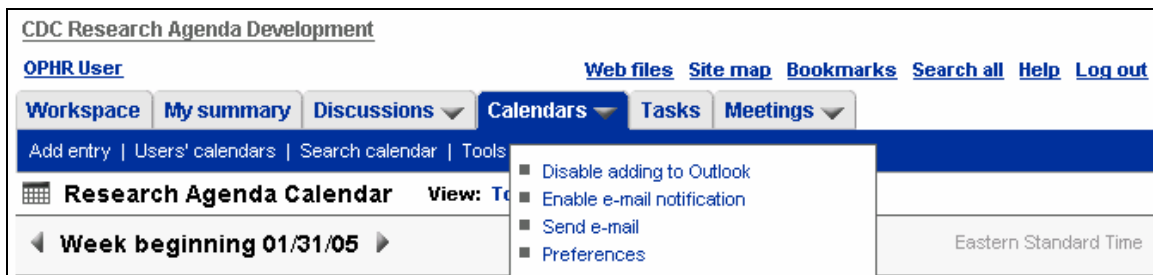
Forum can send you an e-mail notification every time someone adds or modifies an entry in the calendar. The appointment information is attached to the e-mail message. You can import the appointment into a Microsoft Outlook calendar by double-clicking on the attachment. When the Outlook Appointment card appears, click **Save and Close**.

To enable e-mail notification:

1. From the calendar, click on the Tools menu item.
2. Click on **Enable e-mail notification**.

E-mail notification is now enabled. Forum sends you an e-mail message every time someone adds or modifies an entry in the calendar.

To disable e-mail notification, follow the steps above, but click on **Disable e-mail notification** in the menu.



## COORDINATING CALENDARS

### Avoiding conflicts

If you want to make an appointment with someone, you can view his or her personal calendar to check available times.

By default, you can only view entries from another person's calendar. You cannot schedule an appointment or change the calendar preferences.

To view another user's personal calendar:

1. From any calendar, click on the Users' calendars menu item.

Forum displays the "View personal calendars" form.

2. In the "Select calendars" list, click on the name of the person whose calendar entries you wish to view. You can use Ctrl+click to select multiple names.
3. In the Date section, specify the date for the entries you wish to check.

**View personal calendars**

Before scheduling a meeting, you can use this form to check the availability of others attending the meeting. You may select multiple users' calendars.

**Select calendars**

Gary Miller  
Ning Peng  
Susanne Pickering  
**Tony Pruitt**  
Elizabeth L Skillen

**Date**

31 January 2005

OK Close Help

4. Click OK.

Forum displays entries from the personal calendars you selected.

◀ 01/31/05 ▶

People	
Gary Miller	No entries
Ning Peng	No entries
Susanne Pickering	No entries
Tony Pruitt	No entries
Elizabeth L Skillen	No entries
Stephen B Thomas	No entries

Close

5. Click Close to return to the calendar.

## Merging calendars

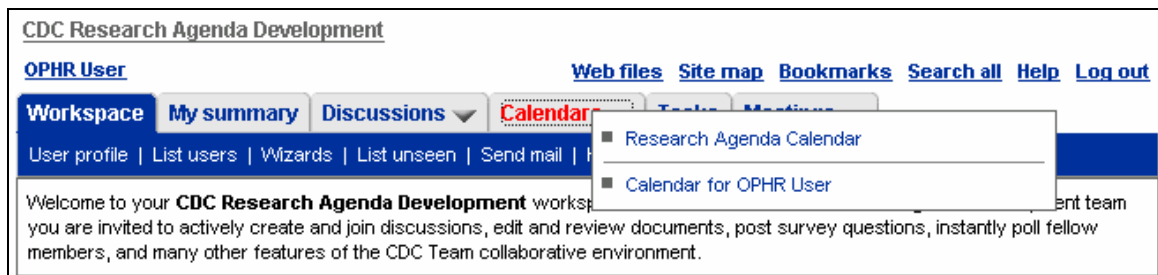
You may have appointments in more than one calendar. To coordinate these appointments, you can merge two or more Forum calendars and view all of the appointments together. You can also coordinate appointments between a Forum calendar and a Microsoft Outlook 2000 calendar.

Users typically access more than one calendar. To view entries from several different calendars within a single calendar, you can merge calendars.

For example, an organization-wide calendar for the CDC could include entries from the various centers, institutes, and offices. As another example, you can merge a workspace calendar with your personal calendar so that you can view entries from both calendars at the same time.

To merge a workspace calendar with your personal calendar:

1. In the Calendars drop-down menu, click the Calendar for [your name] link to access your personal calendar.



2. Click the Tools menu item.
3. Click the **Administration** menu item.

The calendar management menu appears.



**Calendar management: [Calendar for OPHR User](#)**  
Go to the current workspace: [CDC Research Agenda Development](#)

---

Select other management areas [Close](#)

[Manage the workspace](#) [Manage groups](#) [Manage users](#)

---

**Manage calendar features**  
[Merge calendars \(personal view\)](#)  
[Rebuild the search index](#)  
[Scan the database for errors](#)

---

**Manage calendar layout & display**  
[Manage forum templates and graphics](#)  
[Rename this calendar](#)  
[Select templates for use in this calendar](#)

---

**Manage access control**  
[Control access to this calendar](#)

---

**E-mail operations**  
[Manage e-mail posting to this calendar](#)

---

**SiteScope Forum product support**  
[SiteScope Support Forum](#)

---

[Close](#)

4. Click the Merge calendars (personal view) link.

The Merge Other Calendars form appears. It contains a list of all of the calendars to which you have access.

**Merge Other Calendars (personal view)**

Select (or deselect) other calendars whose entries you would like to see appear in this calendar. These entries will only be visible by you; others will not see this merging of entries.

Calendar  
Calendar  
Publication Schedule  
**Research Agenda Calendar**

Show personal calendars? *Warning: checking this box may produce a long list.*

[OK](#) [Close](#) [Help](#)

5. In the Select box, Ctrl+click on the titles of the calendars you want to merge.
6. Click OK.

7. Click Close.

The personal calendar reappears. It now includes entries from the calendars you selected.

The Hide merged entries link in the lower-left corner of the calendar lets you choose which entries appear in the calendar. If the merged calendar page is too crowded, click on Hide merged entries to display only entries specific to that calendar. Hide merged entries then becomes Show merged entries. Click on Show merged entries to redisplay all merged calendar entries.

<a href="#">Hide merged entries</a>	Day <input type="text" value="27"/>	Month <input type="text" value="01"/>	Year <input type="text" value="2005"/>	<input type="button" value="Go"/>
-------------------------------------	-------------------------------------	---------------------------------------	--	-----------------------------------

To turn off this merge, repeat the steps above, and on the "Merge Other Calendars" form, Ctrl+click on the calendar or calendars to deselect them.

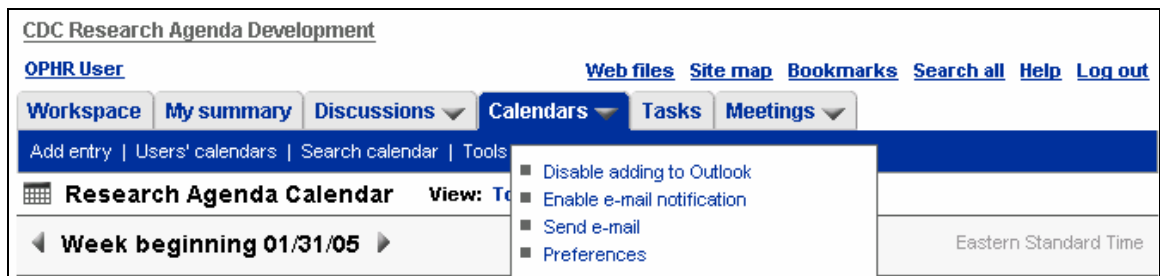
## Exporting appointments

You can export an appointment from a Forum calendar to a Microsoft Outlook 2000 calendar.

To export an appointment to a Microsoft Outlook 2000 calendar:

1. View the Forum calendar that contains the appointment you want to add to Outlook.
2. Make sure that adding to Outlook is enabled by doing the following:
  1. Click on the Tools menu item.
  2. Toward the bottom of the menu, look for the **Enable adding to Outlook** item.
  3. If the item appears on the menu, click on it.

When the item reads **Disable adding to Outlook**, this feature is enabled. Do not disable it.




3. Click on the title of the appointment you wish to add.

The entry appears in a popup window.

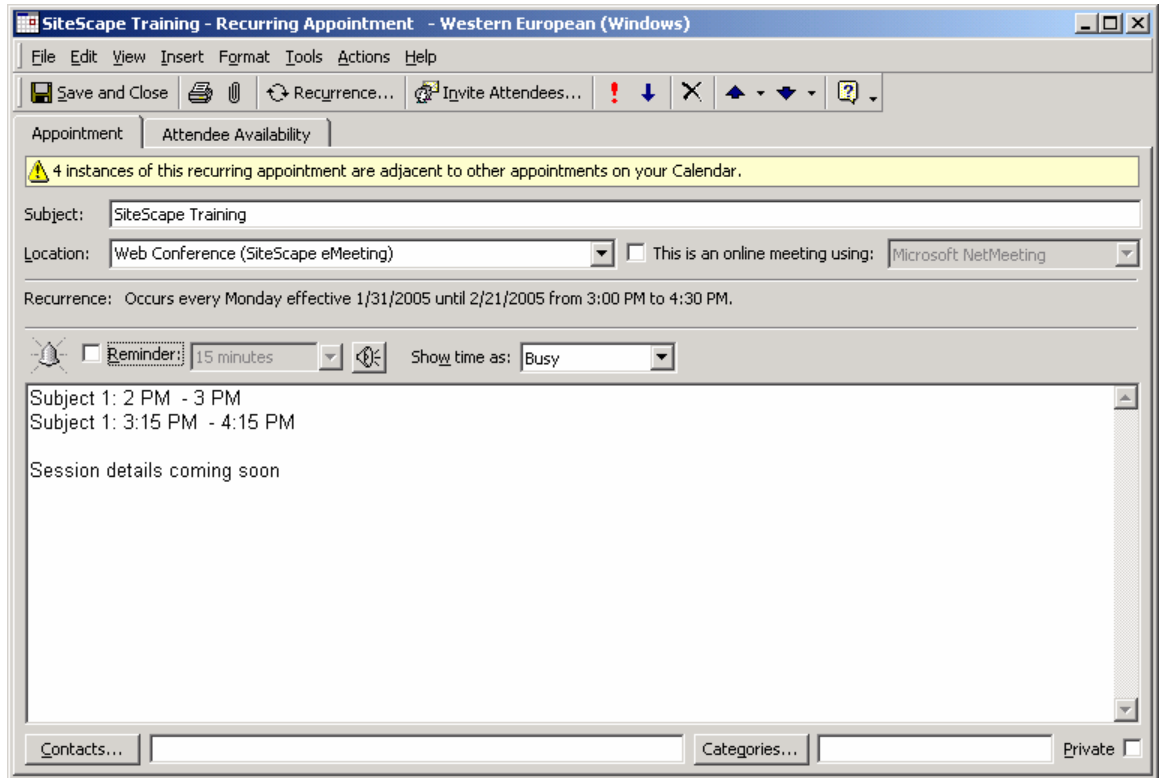
The screenshot shows the 'CDC Research Agenda Development' web interface. At the top, there are navigation links for 'OPHR User', 'Web files', 'Site map', 'Bookmarks', 'Search all', 'Help', and 'Log out'. Below this is a menu with 'Workspace', 'My summary', 'Discussions', 'Calendars', 'Tasks', and 'Meetings'. A blue bar contains 'Add entry | Users' calendars | Search calendar | Tools'. The main area is titled 'Research Agenda Calendar' with view options: 'View: Today', 'Week', 'Month', and 'Year'. A navigation bar shows 'Week beginning 01/31/05' and 'Eastern Standard Time'. A calendar grid lists days from Mon 31 to Sun 06. A popup window titled 'Entry for 01/31/05' is open over the Monday entry. The popup contains the following details: Event: SiteScape Training; Time: Start: 3:00 PM, End: 4:30 PM; Location: Web Conference (SiteScape eMeeting); Created by: Richard Draut; Repeat: Frequency: every week on Monday, Duration: 4 occurrences; Description: Subject 1: 2 PM - 3 PM Subject 1: 3:15 PM - 4:15 PM Session details coming soon. At the bottom of the popup are 'Close' and 'Outlook' buttons.

4. In the popup window, click on the export to Outlook icon.

For illustration only: 

5. If the option to "Open it with the default application" appears, choose this option.

Forum opens Microsoft Outlook and displays the new appointment, as below:



6. Click **Save and Close**.

The appointment is now in the Outlook calendar.

## **TO DO LISTS (TASKS & REMINDERS)**

### **MANAGING TASKS**

The Tasks page helps you keep track of your work using two types of entries:

- **Tasks** are activities you assign to users. Forum indicates when the task is started, almost due, completed, or overdue. Optionally, Forum can send e-mail to assigned users to inform them of the task and its due date.
- **Reminders** provide documentation of events that users need to remember. Forum sends e-mail notifications on or before the dates of the events. You can remind yourself or others of deadlines, errands, meetings, and so on.

You can also attach a task to a discussion-forum entry. The entry may provide documents or discussion replies that are useful or necessary for the completion of the task. If opting to do this, do not create the task before initiating the attachment process.

Tasks and reminders use workflow processes to indicate their status and to send e-mail notifications.

## VIEWING TASKS

To view the Tasks page, log in to Forum and click on the *Tasks* tab. You can see tasks and reminders that you created and those assigned to you.

Tasks and reminders can be in one of two categories:

- **Active** tasks and reminders are those that have not been completed. Active tasks and reminders appear toward the top of the task list.
- **Completed** tasks and reminders have had their state changed manually to Completed.

CDC Research Agenda Development

Gary Miller [Web files](#) [Site map](#) [Bookmarks](#) [Search all](#) [Help](#) [Log out](#)

[Workspace](#) [My summary](#) [Discussions](#) [Calendars](#) **Tasks** [Meetings](#)

Add | Manage tasks | Help

[Delete selected items](#) [Mark all items seen](#)

### Active tasks

delete?	Task	Forum	Creator	Priority	Start	Due	State
<input type="checkbox"/>	<a href="#">Prepare "Using eMeeting" lesson plan, script, and course materials. (Richard) (public)</a> <a href="#">Modify</a>	<a href="#">Training Plan</a>	Richard Draut	Medium	01/21/05	01/24/05	Overdue
<input type="checkbox"/>	<a href="#">Prepare "Document Editing" lesson plan, script and course materials (Robb) (public)</a> <a href="#">Modify</a>	<a href="#">Training Plan</a>	Richard Draut	Medium	01/21/05	01/24/05	Overdue
<input type="checkbox"/>	<a href="#">Develop "Calendaring and Tasking" lesson plan, script and course materials (Gary) (public)</a> <a href="#">Modify</a>	<a href="#">Training Plan</a>	Richard Draut	Medium	01/24/05	02/01/05	Started

### Completed tasks

delete?	Task	Forum	Creator	Priority	Start	Due	State
<input type="checkbox"/>	<a href="#">Configure eMeeting</a> <a href="#">Modify</a>	Tasks	Gary Miller	Medium	01/10/05	01/10/05	Completed




[Delete selected items](#) [Mark all items seen](#)

The task list displays the following information about each task, none of which is required:

- Task name
- Forum (if the task is attached to a discussion-forum entry)
- Creator
- Priority (Low, Medium, or High)
- Start date
- Due date
- State (Started, Almost Due, Overdue, Completed)

You can sort the tasks by clicking any column header, including Priority, Due, and State.

In the task list, one of three icons appears to the left of each active task:

<b>Icon</b>	<b>Meaning</b>
	The task is overdue.
	The task is almost due: the due date is 3 or fewer days away (you can specify a different number when you create the task).
	The due date of the task is more than 3 days away (see above).

## **MANIPULATING TASKS**

### **Add a task**

Within the Tasks page, click **Add** on the menu bar. Choose either **Task** or **Reminder** from the pop-up menu. Complete the form.



**Add a task**

**Task title**

private  public

**Description**

**Formatting options:**  Automatic  None  HTML [Check spelling](#)

**Start date** day: 19 month: January year: 2005 or choose date from popup calendars: [January](#) [February](#)  
[Start now](#)

**Due date** day: 28 month: January year: 2005 or choose date from popup calendars: [January](#) [February](#)

Notify assignees (other than yourself) of this task now  
 Notify assignees when the due date passes  
 Notify assignees  day(s) before the due date

**Priority**

**Assignees** (login names)

[Find user names](#)

## **Modify a task**

Click the **Modify** button that follows after the task title. Edit the task details. When done, click either **OK** to save the changes or **Cancel** to discard the changes.

## Delete a task

Select the tasks to be discarded, then click **Delete selected items** at the bottom of the page. When prompted, confirm your selection.

## Complete a task

To mark a task as completed, view the details of the task. The current state of the task appears on the right-hand side, along with the ability to mark the task as completed. If the task is not yet overdue and you are not the sole assignee, you may mark your part of the task as completed rather than mark the entire task completed.

CDC Research Agenda Development

[Gary Miller](#) [Web files](#) [Site map](#) [Bookmarks](#) [Search all](#) [Help](#) [Log out](#)

[Workspace](#) [My summary](#) [Discussions](#) [Calendars](#) [Tasks](#) [Meetings](#)

[Add](#) | [Modify](#) | [Delete](#) | [Previous task](#) | [Next task](#) | [Send mail](#)

[View the task & reminder list](#)

**Develop "Calendaring and Tasking" lesson plan, script and course materials (Gary)**

Forum entry: [Training Plan](#) > [Webinar - Scheduling and Tasking \(1 hr\)](#)

<b>Task type:</b> Task with notification	<b>Workflow state</b>
<b>Visibility:</b> Public	<b>State:</b> Started
<b>Start date:</b> 01/24/05	
<b>Due date:</b> 02/01/05	<b>Workflow question</b>
<b>Creator:</b> Richard Draut (rdraut)	Is this task completed?
<b>Priority:</b> Medium	<input type="radio"/> My part of the task is completed.
<b>Percent done:</b> 0	<input type="radio"/> The whole task is completed.
<b>Assignees:</b> Richard Draut (rdraut) Gary Miller (gamiller) Robb Chapman (rsc0)	<input checked="" type="radio"/> No.
	<a href="#">Enter response</a> <a href="#">View responses</a>

[Close](#)

## Restart a task

A task that is frequently performed need not be recreated time and again. To restart a task, view the details of a task by clicking on its title. Modify the task as desired, and then click **OK** beside “Restart the task” as pictured below:

The screenshot displays the 'CDC Research Agenda Development' interface. At the top, there is a navigation bar with links for 'Web files', 'Site map', 'Bookmarks', 'Search all', 'Help', and 'Log out'. Below this is a menu with tabs for 'Workspace', 'My summary', 'Discussions', 'Calendars', 'Tasks', and 'Meetings'. The 'Tasks' tab is active, showing a sub-menu with options: 'Add', 'Modify', 'Delete', 'Previous task', 'Next task', and 'Send mail'. The main content area is titled 'Configure eMeeting' and includes a link to 'View the task & reminder list'. A message states 'No forum is associated with this task.' The task details are as follows:

<b>Task type:</b> Task with notification	<b>Workflow state</b>
<b>Visibility:</b> Private	<b>State:</b> Completed
<b>Start date:</b> 01/10/05	<b>Change state to:</b> <input type="button" value="Restart the task"/> <input type="button" value="OK"/>
<b>Due date:</b> 01/10/05	
<b>Creator:</b> Gary Miller (gamiller)	
<b>Priority:</b> Medium	
<b>Percent done:</b> 0	
<b>Assignees:</b> Gary Miller (gamiller)	

At the bottom left of the form is a 'Close' button.

## ORGANIZING TASKS

### Attach a task or reminder to a discussion entry

If a task or reminder is directly related to the content of a discussion-forum entry, you can embed it in the entry such that the task or reminder is visible alongside the content.

NOTE: The task will be created during the attachment procedure, below. You cannot attach an existing task.

To attach a task or reminder to a discussion-forum entry:

1. Open the entry by clicking its title.
2. From the **Attach** menu, choose **Task** or **Reminder**.

3. Enter the task or reminder information.

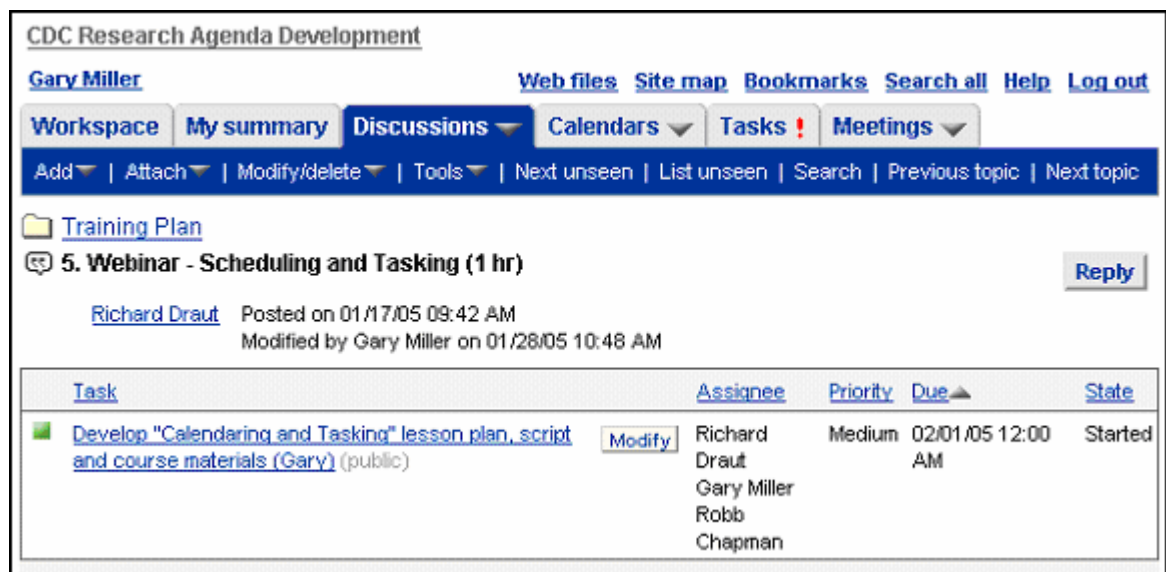
When you add a task to a forum entry, you can choose from two different attributes:

- **Private** Only the task creator and the assignees can see the task.
- **Public** By default, anyone who has the right to view the discussion forum can see the task as well.

**Note:** By default, users can add both public and private tasks to discussion-forum entries. However, managers may turn off access to this feature.

4. Click **OK**.

The entry page reappears, with the task or reminder information below its title. Now, when people view the discussion-forum entry, they can also view information about the task or reminder.



043000000789

When a forum entry contains a task or reminder, the Task icon appears to the left of that entry title in the list of entries, as visible in the image below. (If an entry has both a task and a bookmark, solely the Task icon is displayed.)

If the entry has more than one task, the Task icon that is the most urgent appears. For example, an Overdue task (red icon) is more urgent than a task that is Almost Due (yellow icon). If an entry has both kinds of tasks, only the Overdue icon appears.

CDC Research Agenda Development

Gary Miller [Web files](#) [Site map](#) [Bookmarks](#) [Search all](#) [Help](#) [Log out](#)

**Workspace** | **My summary** | **Discussions** | **Calendars** | **Tasks** | **Meetings**

Add | Modify/delete | Tools | Next unseen | List unseen | Search

**Training Plan**

User filters None  
[Add/modify/delete filters](#)

Unseen	Number	Type	State	Task	Title	Replies	Author	Activity date
	9.				<a href="#">APPENDICES</a>		Richard Draut	01/26/05 03:35 PM
	7.				<a href="#">Question?</a>	(3)	Susanne Pickering	01/25/05 10:27 AM
	6.				<a href="#">Possible session - Filtered Forums and attributes (1 hr)</a>		Richard Draut	01/17/05 09:43 AM
	5.				<a href="#">Webinar - Scheduling and Tasking (1 hr)</a>		Richard Draut	01/28/05 10:48 AM
	4.				<a href="#">Webinar - Document editing and co-authoring (1½ -2 hr)</a>	(2)	Richard Draut	01/25/05 08:09 PM
	3.				<a href="#">Possible session - Initiating and nurturing collaborative activity (1 hr)</a>	(1)	Richard Draut	01/25/05 03:25 PM
	2.				<a href="#">Possible session - Navigating SiteScape and setting preferences (1 hr)</a>	(1)	Richard Draut	01/25/05 03:22 PM
	1.				<a href="#">Webinar - Using eMeeting (1/2 - 1 hr)</a>	(1)	Richard Draut	01/27/05 09:31 AM

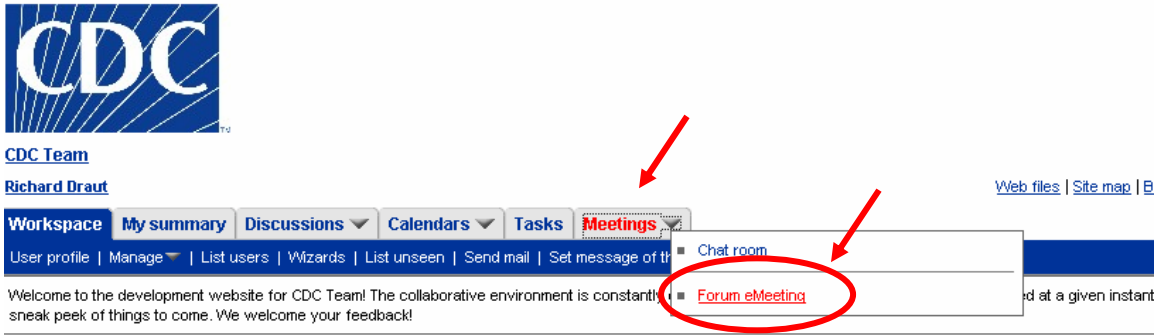
View entry number:   [Top of page](#)

## PARTICIPATING IN AN E-MEETING

### ATTENDING AN EMEETING AS A PARTICIPANT

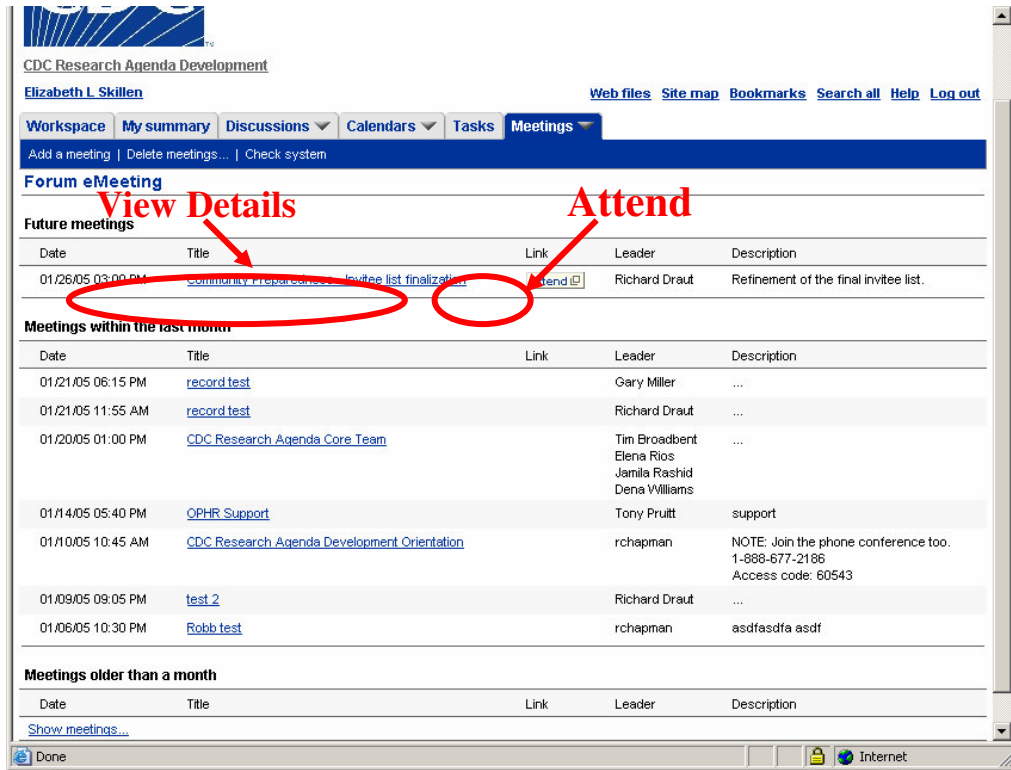
View the Forum eMeeting Screen:

1. Click on the Meetings tab.
- A drop-down menu appears.
2. Click on Forum eMeeting.



The Forum eMeeting list appears. The list is divided into up to four sections: "Future Meetings", "Today's meetings," "Meetings within the last month," and "Meetings older than a month."

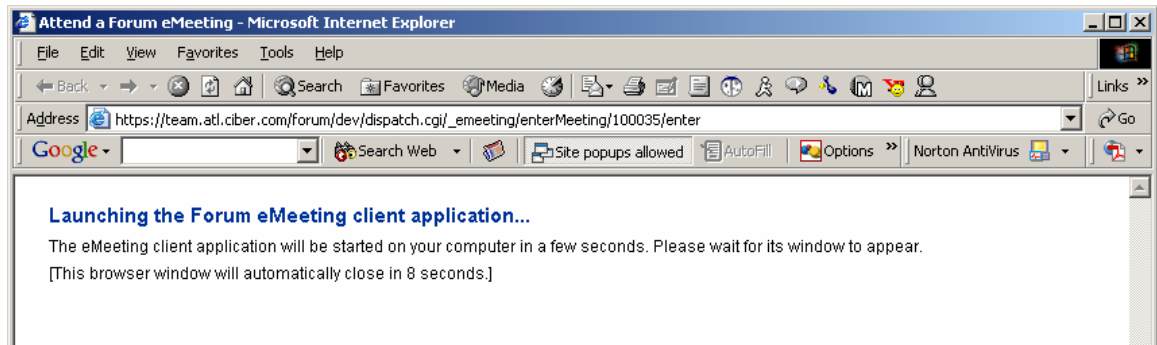
- ❑ To view details about a meeting, click on its title. The phone conference dial-in number and access codes are on the detail page.
- ❑ To attend a meeting, join the phone conference and click on the **Attend** link next to the meeting title.



NOTE: Close all applications, except SiteScape and any application that you intend to share with other eMeeting participants.

### Attending an eMeeting

When you click on the Attend link next to the meeting title, the following screen is briefly displayed.



### First time: eMeeting software download

If this is the first time that your computer has been used to attend an eMeeting and you have not performed the special software download ahead of time, it will



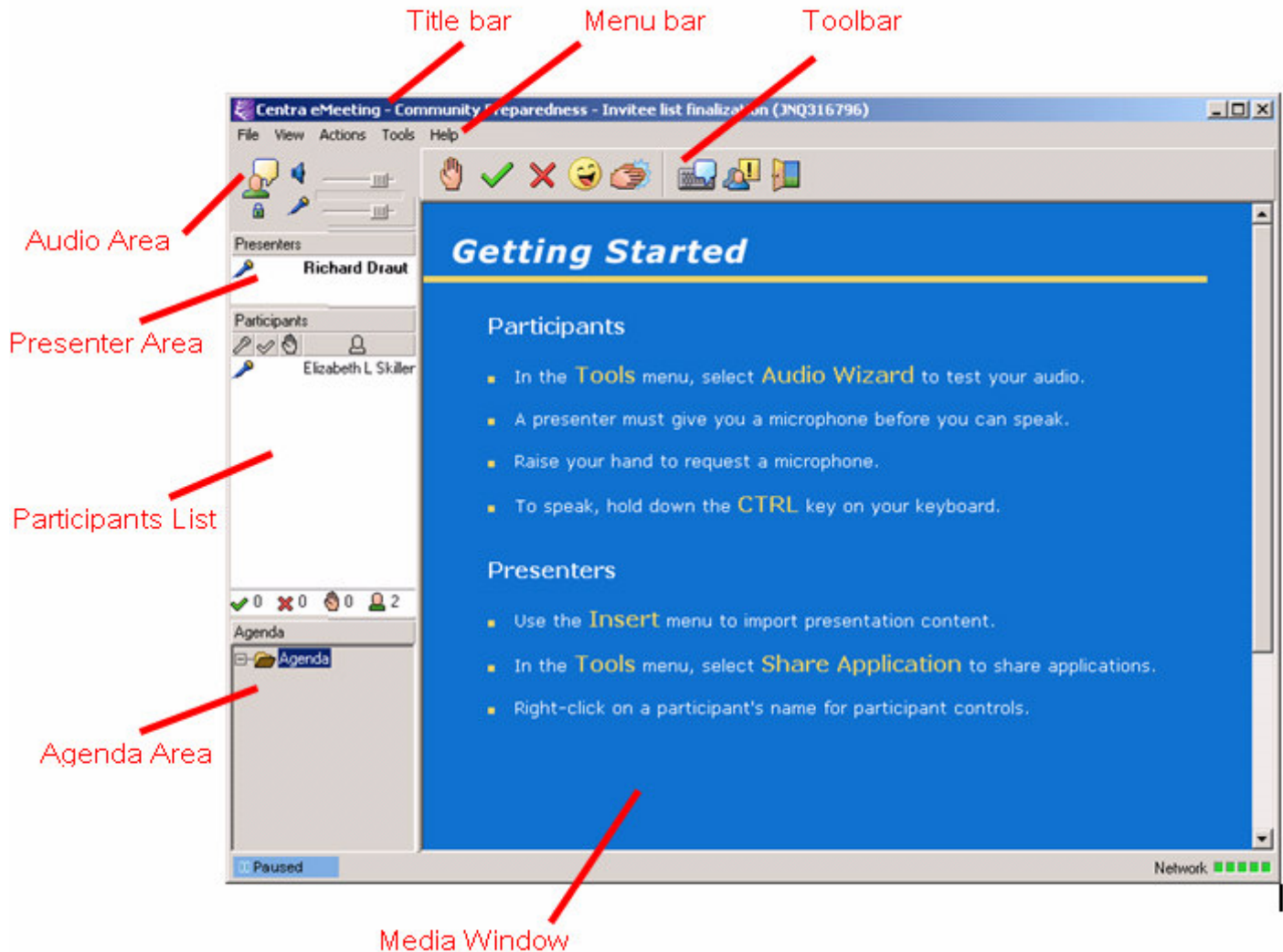
proceed automatically now. **In order for this installation to proceed, you must have rights to install new software on the machine.**

**Refer to Appendix B: Enabling your browser to use Forum eMeeting, for details.**

After the loading screen is displayed for a few moments, the eMeeting window will appear. You have now joined the eMeeting session. You will see your name and the names of other participants in the **Participants** window.

## THE EMEETING INTERFACE

The eMeeting interfaces, both Participant and Leader, contain the following components.



## **Title Bar**

The Title bar appears at the top of the interface.

Standard Windows buttons appear at the right end of the Title bar. Use these buttons to minimize, maximize, or close the interface.

## **Participant Menu Bar**

The Participant Menu bar contains the following default options:

- ❑ **File** - to print or exit a session.
- ❑ **View** - to change the look of your Participant interface.
- ❑ **Actions** - to raise your hand and say yes or no, to indicate laughter and applause, and to step out.
- ❑ **Tools** - to use text chat, set the Audio Wizard and Video Wizard, and view conference call info. Additionally, to host an application, send feedback, or change the view options.
- ❑ **Help** - to find out about this session and to view online Help.

## **Leader Menu Bar**

The Leader Menu Bar contains the following default options:

- ❑ **File** - to print content or exit a session.
- ❑ **View** - to change the look of your Leader interface or Participants' interfaces.
- ❑ **Insert** - to include a PowerPoint presentation, a URL, a File to download, or an existing Agenda in the Agenda.
- ❑ **Actions** - to raise your hand, say yes or no, step out and return, clear yes/no responses, clear microphones, and lower hands. Additionally, to indicate laughter and applause, and grant microphones to all.
- ❑ **Tools** - to use the tools (Survey, Web Safari, and Appshare), use text chat and set text options, enter conference call information, invite by email or Instant Messenger, change voice options, change the Appshare options, or run the Audio or Video Wizard. Additionally to collect feedback, use the Whiteboard, and change the view options.
- ❑ **Help** - to find out about this session and view online Help.

**Note:** The Record, Markup, and Video menus appear when these features are enabled.

### **Video Panel**

The Video panel opens when video services are launched. The broadcaster appears in the panel.

### **Presenters Area**

The Presenters area lists the Leader and Co-Presenters for the session. The Leader's name appears first and is followed by any Co-Presenters.

### **Participants List**

The Participants List shows the Participants in the session.

Click the associated icon above the list of names to sort the Participant List by microphone, Yes or No responses, raised hands, or Participant names. In a Participant interface, the user's name appears at the top of the list. To view another Participant's full name, hold the mouse over the Participant's name. A summary area shows the total number of Participants who responded Yes or No, or who raised a hand. It also shows the total number of Participants in the Main Room.

### **eMeeting Leader**

eMeeting also includes an auto-sort feature, which allows the Leader to sort

Participants by:

- Ascending order of names (alphabetically)
- Descending order of names (alphabetically)
- Raised hand
- Yes or No responses

#### **To sort Participants automatically:**

1. Select **Tools, View Options**.
2. Click the **Auto Sort** radio button in the **Participant Table** area.
3. In the **First by** drop down menu, select the primary order in which to sort Participants.
4. In the **Then by** drop down menu, select the secondary order in which to sort Participants (optional).
5. Click **OK**.

### **Agenda Area**








The Agenda area lists the content for the session in the form of an Agenda. Leaders and Co-Presenters use an Agenda during a session as a guide to select and show content and tools.

### **Status Bar**

The Status bar indicates whether the session is in pre-session or session mode, or if the session is being recorded. eMeeting sessions are considered "in session" as soon as the Leader enters.












### Participant Toolbar




The Participant toolbar provides quick access to many eMeeting functions. The following lists which Toolbar buttons are available in each Centra application.

Icon	Description
	<b>Raise your hand</b> to ask a question. A number appears next to their name to indicate the order in which Participants raised their hands. Click again to lower your hand.
	<b>Say Yes</b> (check mark) to answer yes to a question. <b>Say No</b> (x mark) to answer no to a question.
	<b>Indicate Laughter</b> at any time. A smiley face flashes to the left of your name for five seconds.
	<b>Indicate Applause</b> at any time. Clapping hands flash to the left of your name for five seconds.
	Communicate with other Participants and the Leader using <b>Text Chat</b> .
	<b>Provide Feedback</b> to the Leader.
	<b>Step Out</b> to temporarily leave a session.

## Leader Toolbars

The Leader interface Toolbar provides quick access to many functions. The following lists which Toolbar buttons are available in each Centra application.

Icon	Description
	<b>Give microphone to next raised hand</b> to allow the Participant to speak. Each time Participants click Raise Your Hand, a number appears next to their name to indicate the order in which they raised their hands.
	Communicate with others using <b>Text Chat</b> .
	Show anonymous <b>Feedback</b> from Participants regarding the session.
	<b>Raise your hand</b> to ask a question. Click again to lower your hand.
	<b>Say Yes</b> (check mark) to answer yes to a question. <b>Say No</b> (x mark) to answer no to a question.
	<b>Display selected Agenda item</b> to show the item in the Media Window to all.
	<b>Share an application</b> to show an open application on your computer to all others.
	<b>Conduct a survey</b> to poll Participants.
	Go on a <b>Web Safari</b> to share Web sites and active Web site links with Participants.
	Use the <b>Whiteboard</b> to type text, create simple shapes, or highlight images.
	<b>Show Conference Call Information</b> during a session.






	If enabled, broadcast <b>video</b> in the session.
	If enabled, <b>pause</b> the Server-Side Recorder.
	If enabled, use the Server-Side Recorder to <b>record</b> the session.

**Media Window**

The Media Window shows the Agenda item or tool (such as Appshare, Web Safari, or Whiteboard) currently being used.

**Network Status Indicator**

A Network Status Indicator appears in the lower right corner of the eMeeting interface. Five lights indicate the quality of your network connection:

State	Indicator
Good connection 	4 or 5 green lights with the last one blinking
Fair connection 	2 or 3 yellow lights with the last one blinking
Poor connection 	1 red light
Disconnected 	5 red lights
Reconnected 	5 green lights

**PARTICIPANT**

**BASICS**

- As a Participant, you can:

- ❑ Raise your hand.
- ❑ Respond to questions with a Yes or No answer.
- ❑ Use markup tools.
- ❑ Communicate with others using Text Chat.
- ❑ Play back a recording of a session.
- ❑ Use the View menu to change the interface display.
- ❑ Broadcast video.
- ❑ Interact with or share an application on your computer.
- ❑ Provide feedback to the Leader.
- ❑ Temporarily step out of a session.

## **PARTICIPANT TIPS**

- ❑ Make sure you can clearly hear the Leader and others at all times. Run the Audio Wizard if you encounter problems.
- ❑ Raise your hand to request a microphone or ask a question.
- ❑ Remember that running other applications while in session can slow your session.
- ❑ If experiencing a technical problem, close the session and then rejoin it.
- ❑ Use Private Text Chat to communicate with the Leader if you continue to experience technical problems.
- ❑ Click **Step Out** to temporarily leave the session.

## **TEAM TRAINING AND SUPPORT**

### **Training resources, user manuals, and guides**

Training resources are located in the Training and Support workspace. Look in the Training Materials discussion forum and the CDC Team User Guides entry. Additional information is the FAQ & Tutorial for Forum Managers discussion forum.

### **CDC Team Support**

This is the order for problem solving and issue resolution

1. Check the “Quick Guide”
2. Try the context-sensitive help pages themselves
3. Use the “User Guide”
4. Use the CDC Team “Help” link
5. Search the CDC Team Support Forum
6. Post a request to the CDC Team Support Forum
7. For emergencies contact us by phone

### **Support forms**

The CDC Team Support forum is located in the Training and Support workspace under the Helpdesk discussion forum.