Virtual Office Manager

Administrator Guide

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Introduction

What is Port 80 Virtual Office Manager?

Port 80 Virtual Office Manager integrates the powerful Community of Practice (CoP) tools into your organization website. Communities of Practice connect individuals with each other in self-organizing, boundary-spanning communities. CoP's are made up of distributed groups of people who share a concern, set of problems, mandate or sense of purpose.

Virtual Office Manager can be used with Port 80 Web Manager or seamlessly integrated into an existing web site.

Virtual Office Manager has easy-to-use tools available to the administrator to manage the secure online area. Unlike other web page creation applications you may have used in the past the Web Manager makes all changes on the live site immediately. So be very careful when working in the Web Manager Administration area.

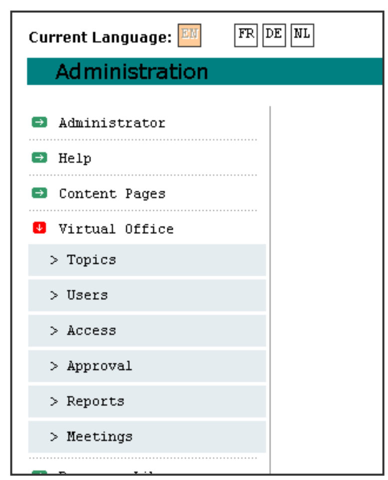
Logging In

To access the Administration tools for your Virtual Office go to http://cms.nortia.org/admin

Login to the web area with the user name and password supplied by your Port 80 Representative.

Keep in mind any changes you make will be automatically transferred to the live site. So be 100% sure of any changes you are making!

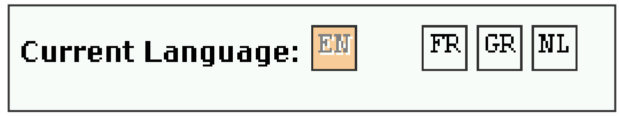
Main Features



Once your password has been accepted, you will be taken to the Administrators Console. Please note Port 80's Virtual Office and Web Manager share the same administrator's area, so the options available in the left menu will be slightly different for each organization, and may not appear exactly as illustrated in the screen shots throughout this document.

This guide is written to explore each of the sections under the Virtual Office menu option.

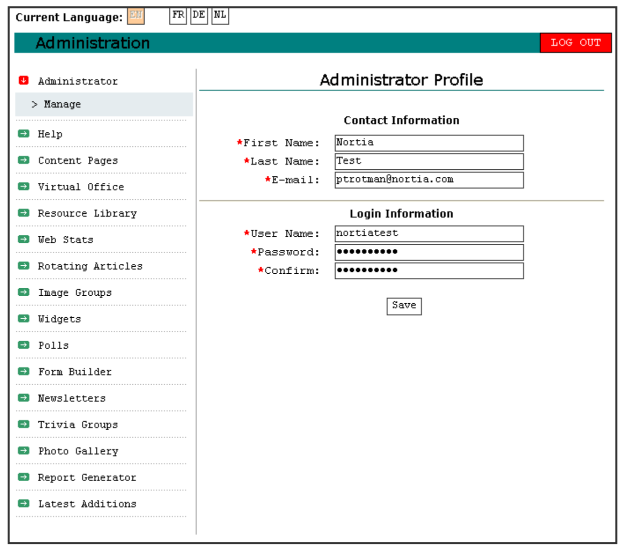
Language Settings



Language Settings are shown at the top of the Administrator Console. Not every site will have multiple languages content. If you do have additional languages, locate 'Current Language' at the top left of the Table of Tools.

By default, English (En) will be selected. To change to another language, simply click on the desired language symbol. The selected language will be highlighted. The unselected language(s) will be colourless and will be shifted slightly to the right. For example, in the illustration above, English is selected.

Administrator



In the Administrator section you can change the administrator's contact and login information (user name and password).

Click on 'Administrator' and enter the appropriate information in the fields; ensuring that the 'Password' field and the 'Confirm' field are the same. Click the 'Save' button to update the administrator information.

Please Note: As an administrator and only if your organization has "Security Zones", you may have the ability to edit other administrators contact and login information. To edit an administrator, select a name from the drop down menu and change the contact or login information accordingly and click 'Save' to store your changes. Please use caution when editing another users login information as they will be unable to login to the system without notification of their new login information.

Content Pages

The Content Pages section will allow you to edit information on your Community page as well as upload files that you can link from your pages.

Under 'Content Pages' on the left side of the screen, you will see a list of tools available to you. They are:

- Manage Pages
- File Management

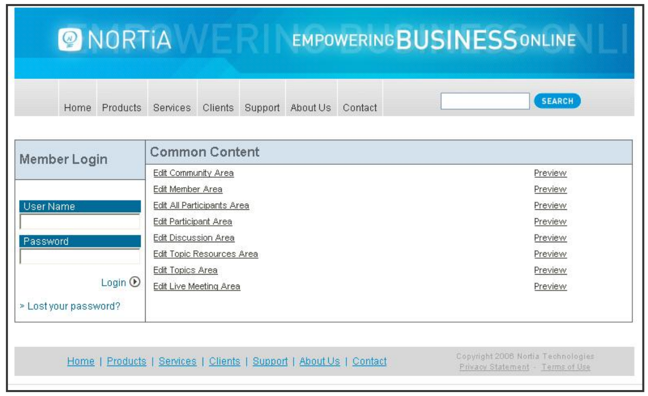
We will discuss each tool in further detail.

Manage Pages

The Manage Pages section allows you to globally edit and preview the page content in various areas of your Virtual Office. Most administrators use this tool to add instructions to the top of the various Virtual Office pages their Members will see.

Editing and Previewing your Virtual Office Areas

To edit or preview your Virtual Office areas, hold your mouse pointer over the Community (or Virtual Office) page and select Edit from the list of options that appear. A window similar to the screen shot on the right will appear. Once logged in, each screen of the Virtual Office will be laid out in a similar fashion. Most organizations will have their banner, and their web site navigation at the top of each screen. We refer to the column on the left as the Control Panel, and the area on the right as the Content Area.



To create the content that will appear in a specific Virtual Office area/page, simply click on the corresponding option listed. The following is a brief description of the area that will be edited with each selection:

Edit Community Area – this is the information users will see when they first come to your Virtual Office login page or when they log out of the Virtual Office.

Edit Profile Area – this information will appear at the top of the Content Area when a member chooses to Edit their Profile.

Edit All Participants Area – each Virtual Office Topic has a Member/Participant link. This information will appear at the top of the Content Area when a member chooses to view the Member/Participant information in any given Office/Topic.

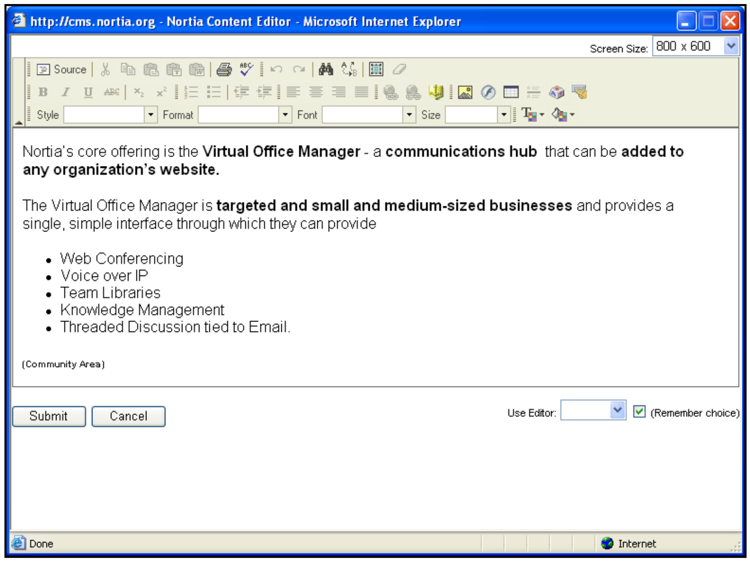
Edit Participant Area – when a member clicks on another Members name in the Control Panel they will see this information above the of the profile information.

Edit Discussion Area – each Virtual Office Topic has a Discussion link. This information will appear at the top of the Content Area when a member accesses this area in any given Office/Topic.

Edit Topic Resources Area – each Virtual Office Topic has a Resources/Links/Files area. This information will appear at the top of the Content Area when a member accesses this area in any given Office/Topic.

Edit Topics Area – this information will appear when a user clicks on the Manage Topics link that is available in the Control Panel

Edit Live Meetings Area – each Virtual Office Topic has a Live Meetings area. This information will appear at the top of the Content Area when a member accesses this area in any given Office/Topic.



Once you click on a link to edit the content in a given area the Content Editor will open. The Content Editor will look like the illustration to the right. Does this window look familiar? The tool bars located at the top are similar to Microsoft Word tools, so you can edit the content using similar tools from your familiar word processing program. To add content in a text format simply type and add your content onto the blank screen. If you are copy and pasting text from another application please refer to the instructions in Appendix A.

If you are more comfortable working in HTML you can access the source code for this content area by clicking on the Source check box in the top left corner of the Content Editor. To return to the Word editor, simply click in the 'Source' option box again.

To accept the changes you have made click on 'Submit Data'. If you click 'Cancel' or you exit the Content Editor without clicking 'Submit Data', all of the changes you have made will not be saved. Therefore, it is advisable to click 'Submit Data' every few minutes to save your changes.

When you click on Submit Data, the Content Editor will close and you will be returned to the Community/Virtual Office page. You can choose to Edit anther area or close the window. If you would like to preview your changes, simply click on the corresponding preview link.

For additional Content Editor Tips, please refer to Appendix A.

Previewing your Community/Virtual Office Page

To preview your Virtual Office login page, run your mouse pointer over the Community.asp page and select Preview from the list of options that appear.

File Management

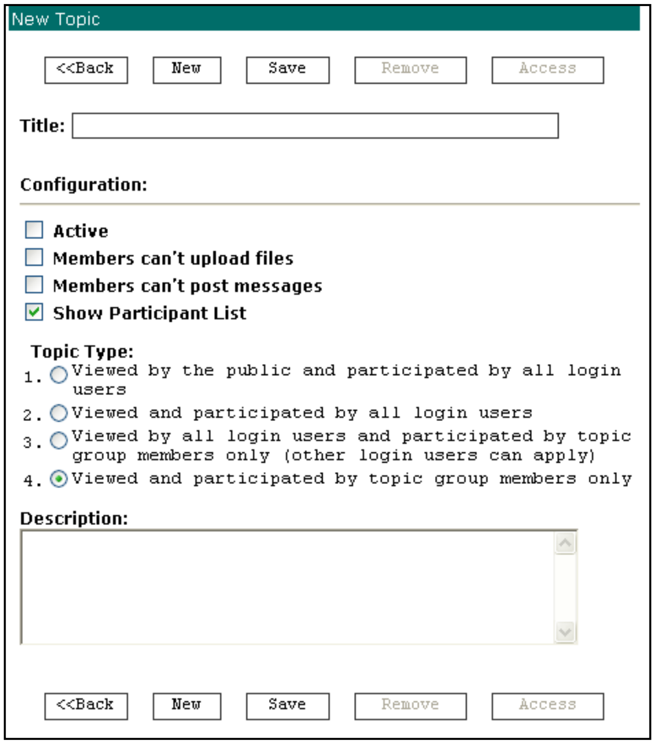
Each Office has an Overview/Welcome area. You can give specific Office Members the ability to edit this page using the same Content Editor tool. We will discuss this in more detail later. However, for security reasons Members are not able to upload pictures that can be used on their Overview pages. So if they would like to include an image, you will have to upload it for them. For additional details on posting files to your Topic Overview area, please contact your Port 80 Representative.

Topics

Within your Virtual Office, you can create an unlimited number of Topics, and you can assign an unlimited number of Users access to one or more Topics.

Add a Topic

To create a new Topic, click on 'Topics' below the Virtual Office Manager menu option. In the 'Topics: Search' window, click on the 'New' option. The screen will be refreshed to display the New Topic screen as seen to the right.



Enter the name of your new Topic (Office) in the **Title** field.

Click on the **Active** check box to make this Topic active.

If you would not like any Members to be able to upload files to this Topic click on the **Members can't upload files** check box. Please note: Topic Leaders will be able to set individual file access and upload privileges from within the Topic.

If you do not want to give Members of this Topic the ability to post messages in the Discussion area click on the **Members can't post messages** check box.

Now, choose the appropriate **Topic Type**. The Topic Types start at 1 the least "secure" to 4 the most "secure".

1: Viewed by the public and participated by all login users – this means that anyone who accesses the login page will be able to participate in these Topics

2: Viewed and participated by all login users – all of your Virtual Office Users will be able to see and participate in these Topics

3: Viewed by all login users and participated by topic group members only (other login users can apply) – users must be assigned to these Topics to participate. However, all users will be able to see this Topic exists and will have the ability to apply to gain access to these Topics

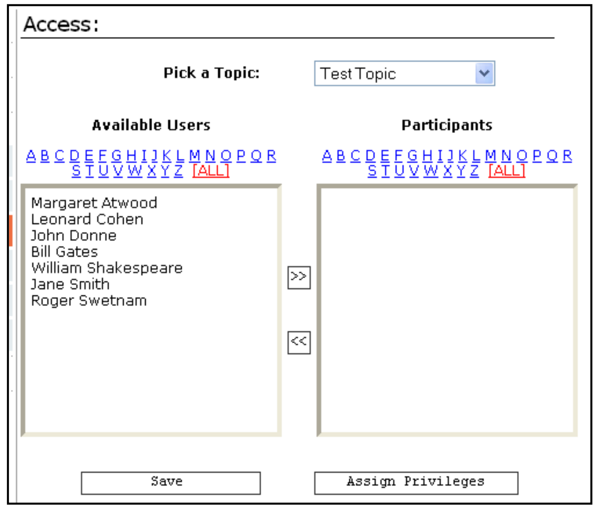
4: Viewed and participated by topic group members only – only those people who have been assigned by you the administrator will have access to participate in these Topics

Finally, you are able to add a **Description** for the each Topic.

Once you have selected the Topic Type, click 'Save' to save the new Topic.

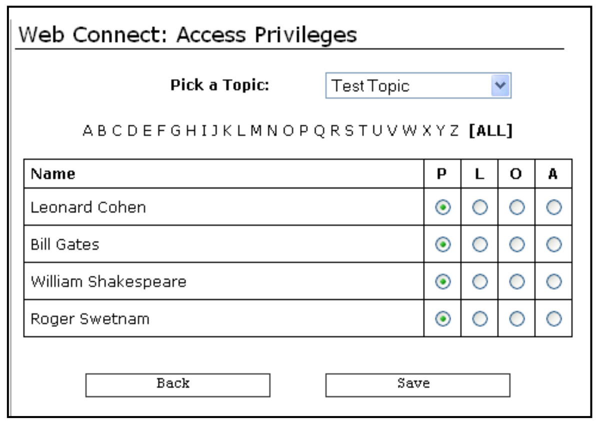
Once you have created your new Topic, the next step is to add Members to the topic. Once your new topic is successfully saved, the screen will refresh and the **Access** bottom near the bottom right of the screen will become enabled. Click on this button to add Users to the topic or use the 'Access' option under the Virtual Office menu option in the Administrator Console.

This will refresh the page to display the Virtual Office **Access** page. If you navigated to this page from the new Topic screen you will see the Topic you just created in the Pick a Topic drop-down field. If you navigated to this page through the menu options be sure to select the Topic that you would like to add users to.



From the **Available Users** box, select the user you wish to add and click on the double arrow pointing to the right. This will move their name to **Participants** box.

Use the alphabetized list or the 'All' button to search for specific users of interest. Once users have been added to your Participants box, click on the **Assign Privileges** option to customize the permission levels of this Topic's participants. The screen will refresh to display the Access Privileges information. You can assign Topic participants one of four access levels.



Participants (P) -

- Can view the Topic Overview page
- If given the privilege by the Topic Leader they may be able to view and/or upload links and files
- Can view Topic member profiles
- Can post messages and delete their own messages in the Discussion area
- Can be invited to, and can participate in Live Meetings

Leader (L) - There can only be one leader per Topic… so choose wisely.

- Can view and edit the Topic Overview page
- Can view and upload links and files
- Can assign view and upload privileges to each all other Topic members
- Can view Topic member profiles
- Can post messages and delete their own messages in the Discussion area
- Can delete messages from all other Topic members
- Is the only Topic members who is able to schedule Live Meetings

Observers (O) – This access level is rarely used. The have the same privileges as a Participant, but Observers do not appear in the participant lists, but their names will appear next to any messages, link and/or files that they post.

Topic Authors (A): - exact same privileges as a Participant, but also have the ability to Edit the Topic Overview page.

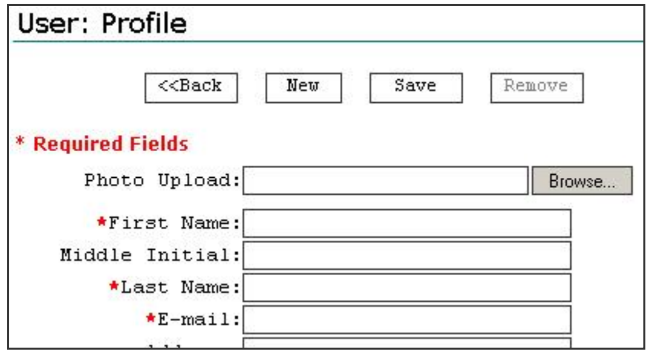
For each participant, click in one of the privilege level option circles. Once finished, click on 'Save' to store your changes.

Users

You can create an unlimited number of Virtual Office Users and assign them to one or more Topics.

Adding a User

In order for a user to have access to a (level 2, 3 or 4) Topic, they must first be entered into the system.



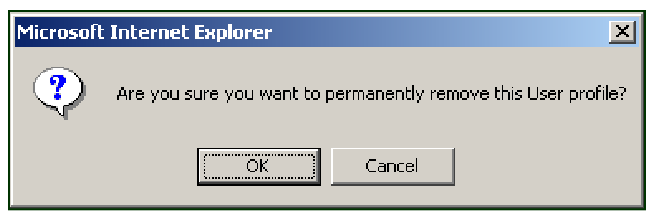
Users can subscribe themselves or the organization administrator can manually add users to the system. If you do not see a sign-up (become a member) link on the users login page let your Port 80 Customer Service Representative know.

As an Administrator you can enter a new User into the system by clicking on the User option, below the Virtual Office menu item. The screen will refresh displaying a list of all of the users currently in the system. To enter a new User click on the New button located at the bottom of the window. Fill in the required fields with the appropriate information and click ‘Save’. Be sure to note the User Name and Password to forward on to the user. To return to the ‘User: Search’ screen, click on the ‘Back’ option.

Editing a User

Click on the desired user name. The user’s profile will open. Make any necessary changes and click ‘Save’ to store the additions. Note: Be cautious of editing a user’s login name and password without the user’s approval because once you have made the change, the user will no longer have access to the system unless you notify them of their new login information.

Deleting a User



There are two methods utilized to remove a user from the system. The first option, while within the ‘Users: Search’ page (click on the ‘Users’ option from the main tool bar), select the option box next to the desired user and click on the ‘Remove Selected’ button. Or, click on the user’s name to display the user profile. In the ‘User: Profile’ page, click on ‘Remove’ to delete this user from the system. When the Microsoft Internet Explorer window appears, click on ‘OK’ to continue with the removal or click ‘Cancel’ to end the procedure.

Note: Removing a user using either of the methods noted above will delete the user from the server. If you wish to remove a user from a select topic, however keep their user information within the system, you must edit the topic access level by selecting ‘Access’ and removing the user from the specific topic.

Exporting a User List

When you first enter the User area you will see an Export button. Click on this button to Export your user list to a CSV file. The export includes all of the Users profile information (with the exception of their username and password). It also includes the date their User record was create, the last date they edited their profile, and the date they last logged into the Virtual Office. Please note: you must save the export file to your computer before opening it.

Access

Editing Access Levels

At any time, as an administrator you can assign the Access Level of Topic Members. To edit Topic Members or to reassign Access Levels, select the **Access** option from the Virtual Office menu.

Use the drop down menu to find the topic of interest. The screen will automatically refresh to display topic participants. To remove a Member from a Topic select their name from the box on the right and click on the double-arrow pointed to the left. Be sure to click Save to finalize the change.

To change a Topic Members access level click on the Assign Privileges button. Make any necessary changes and click 'Save'.

Approval

Users area able to apply to Level 3 Topics through the Manage Topics area in the User console for the Virtual Office. If a user requests access to a Level 3 Topic, you can grant them access to the topic, through the Approval area.

Approving Users

Enter the Approval page, by clicking on the 'Approval' option from below the Virtual Office menu in the Administrators console. A listing of all Users who wish to access a specific topic will appear. Click on the specific topic name to view a complete list of all requesting users. Select users by clicking in the option box to the left of the user name. You will know a user has been selected because a check mark will appear in the corresponding option box. The 'Approve Selected' and 'Reject Selected' options will become enabled. Click on the appropriate option to approve or reject a user's request.

Reports

The 'Reports' area allows administrators to quickly view the members of each Topic Area within the Virtual Office. Use the alphabetical legend at the top of the page to quickly locate the topic area you are looking for, once found simply click on the Topic Title for a list of members. Finally, the lists can be printed or copied and pasted into external programs such as Microsoft Excel, etc…

Meetings

We have integrated a variety of online Meeting applications into our Virtual Office. Scheduling a Live Meeting involves a three-step process. Step 1 sets up the meeting time, date and gives the meeting an identity. Step 2 involves setting up meeting options such as the bandwidth and privacy settings. Step 3 involves selecting members to participate in the meeting.

Select the **Meeting** option found in the Virtual Office menu option. A list of existing meetings will appear. To create a new meeting, click on the New button. The screen will refresh and Step 1 will appear.

In **Step 1**, enter the Meeting Title, meeting Topic, the online meeting Service you would like to use, a Description, and the meetings Date and Time. Click on ‘Step 2 >>’ to continue.

In **Step 2**, you may be asked to enter the following options:

Bandwidth Limit - A drop down menu with various bandwidth is provided to help control the connection speed of the meeting. By default, the bandwidth is set to Client Bandwidth.

Starting Permission – Select this item if you would like the meeting to start without the moderator’s presence. If the moderator’s presence is required to start the meeting, leave this box unchecked.

Recorder – Check this box if you would like the capability to record meeting. This is an excellent tool to review meeting contents after the completion of the meeting. Please note: you still have to click on the Record button once the meeting application has been launched.

Private – Check this box if the meeting is Private and Confidential. If checked, access to this meeting is limited to individuals selected in step 3. If unchecked, the meeting is available to the public (i.e all users of your organization’s Virtual Office) and only the moderator is chosen.

Click on ‘Step 3 >>’ to continue.

In **Step 3**, you will be required to choose the moderator, or the moderator and participants depending on your Private settings in Step 2.

If ‘Private’ is checked – then this step requires you to select the participants and the moderator for the meeting. Under the Participants heading, there are two lists available. The list to the left is the list of all available participants in your Virtual Office. The list on the right (which starts out empty) is the list of all participants in this private meeting. Use the “Add >>” arrow to move available participants to the meeting list on the right. Use the “<< Remove” button to remove participants from the meeting. Now, select the moderator of the meeting by selecting the name of the individual in the drop down menu under the Moderator heading located below the Participant area. Please note that the moderator is selected from the list of participants of the meeting. This means that to be a moderator, the individual has to be a participant whose name appears on the meeting list (on the right) of the participant area. Now click on ‘Finish’ to save the meeting settings.

If ‘Private’ is unchecked – then this step chooses only the moderator since the meeting is public and is available to all user in your Virtual Office. First, enter the maximum meeting capacity in the ‘Enter Public Seats Needed:’ field. Next, select a moderator from the drop down menu. The list in the drop down menu is made up of all users in your Virtual Office.

Now click on ‘Finish’ to save the meeting settings.

Note: if you schedule a meeting you will be charged for the meeting hours regardless if no one attends. You may cancel a meeting 48 hours in advance without being charged.

Appendix A - Port 80 Content Editor

The Content Editor has been designed to resemble the look and feel of common word processing applications, so that you can edit the content by using familiar WYSIWYG tools.

Note: for those users with HTML experience, you can build your content in HTML by clicking on the Source check box in the top left corner.

To accept the changes in HTML or Word editor, click on 'Submit Data'. If you click 'Cancel' or you exit this window without clicking 'Submit Data' all the changes you have made will not be saved.

Content Editor Tips

Lets take a look at some of the functionality of the Content Editor. We will take a look at each of the tools in the menu bar, starting in the top left and working our way across each row. Note: short cut key(s) are in parentheses.

Cut (Ctrl + X)
If you would like to remove a piece of text or a graphic – select that piece of content and then click on the Cut icon.

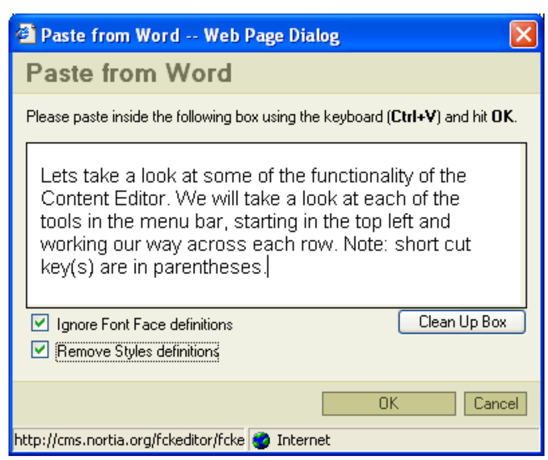
Copy (Ctrl + C)
If you would like to copy text or graphic select that piece of content click on the Copy icon – move the cursor to where you would like to Copy the Content and then click the paste icon:

Paste (Ctrl + V)
Once you have copied a piece of text (from within the Content Editor or from another document or email) move your cursor to where you would like to insert the text you have copied and click on the Paste icon.

Paste as Plain Text
If you have copied the text that has a different format (colour, font, size) than you would like to use, click on the Paste as Plain Text to only copy the text without any formatting. This function can also be used to copy content from existing web pages.

Paste from Word
If you are copying and pasting from a Word document;

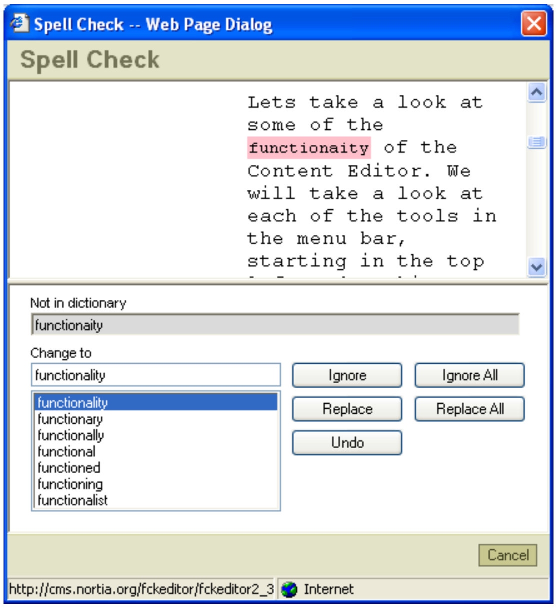
- copy the desired text from Word
- in the Content Editor place your content where you would like to paste the text
- click on the Paste from Word icon, this will open the Paste from Word and then click on the Paste From Word icon to preserve the formatting of original word document.
- Make sure the Ignore Font Face definitions and Remove Styles definitions are checked
- Then click on the OK button
- The text will be pasted into the content editor



Print
Click on the Print button to print your page content.

Spell Check

Click on the Spell Check option to check your content for possible spelling, grammar, and writing style errors. Clicking on the Spell Check button will open the Spell Check window. This tool works in a very similar fashion to other Spell Check tools which display any spelling errors and then allows you to select from alternatives, type in an alternative word, ignore the error, and replace all similar errors.



Undo

If you have made a change that you to not want to keep click on the undo button to revert back to the way the content was before performing your last function.

Redo

Works in the opposite manner as the Undo button.

Find (Ctrl + F)

If you would like to find a specific word or phrase, click on the Find icon. A small pop-up window will open in which you can enter the word or phrase to search for in the current document.

Replace

If you would like to replace a specific word or phrase, click on the Replace icon. A small pop-up window will open in which you can enter the word or phrase you wish to replace as well as the new content.

Select All (Ctrl + A)

To select all of the content in the entire document including graphics, tables, etc click on the Select All button.

Remove Format

To remove the colour, font type, size, etc from a piece of text, select the desired text and then click on the Remove Format button.

Bold (Ctrl + B)

If you would like to make a word or phrase Bold, select the desired text and click on the Bold button.

Italics (Ctrl + I)

If you would like to make a word or phrase Italics, select the desired text and click on the Italics button.

Underline (Ctrl + U)

If you would like to underline a word or phrase, select the desired text and click on the Underline button.

Strike Through
You can add the strike through line to text by selecting the desired text and clicking on the Strike Through button.

Subscript
If you would like to change the format of a character to Subscript select that character and then click on the Subscript button. (For example, the '2' in H_20)

Superscript
If you would like to change the format of a character to Superscript select that character and then click on the Superscript button. (For example, the '2' in m^2)

Numbered List
You can place items in a numbered list by clicking on this button. To end a list click on the Enter button twice.

Bulleted Points
You can make a bulleted points list by clicking on this button. To end a list click on the Enter button twice. Please note: if you have applied formatting to the text you are trying to bullet the text may not be displayed exactly has you have intended.

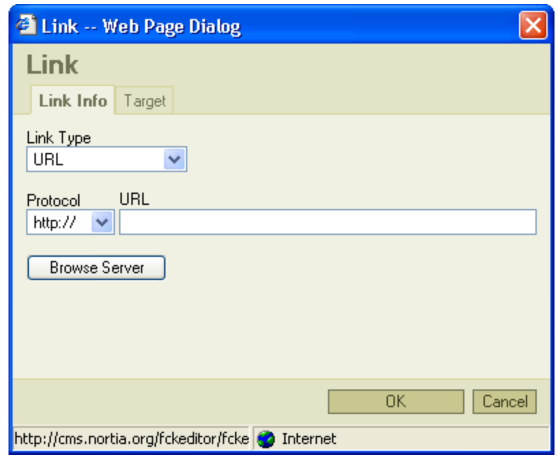
Tab Left
To move a section of text one tab space to the left, highlight the desired text and click on the Tab Left button.

Tab Right
To move a section of text one tab space to the right, highlight the desired text and click on the Tab Right button.

Alignment Buttons
You can change the alignment of a section of text by selecting that text and then clicking on one of the four alignment buttons: align left, centre align, align right, and justify left and right.

Add Hyperlink

If you would like to link a section of text or a graphic to a web page, file or email address, select the text or graphic you would like and then click on the Add Hyperlink button.



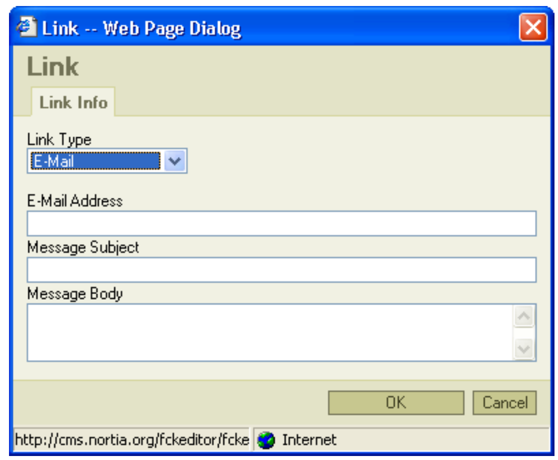
Link Type: URL

The Link Web Page Dialog box will open where you can enter the URL (web address) for the page you would like your link to open.

You may also link to a file you have already uploaded to your organization's folder. To link to a file, click on Browse Server and click on file and click on 'Submit'.

Link Type: Email

In addition, you can also link a section of text or graphic to an email address. To link to an email, in the Link Type drop down menu, select Email. Enter in the E-mail Address, Message Subject and Message Body. Click 'Ok' to save your hyperlink.

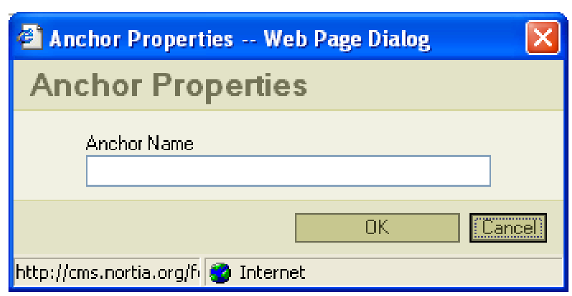


Remove Hyperlink

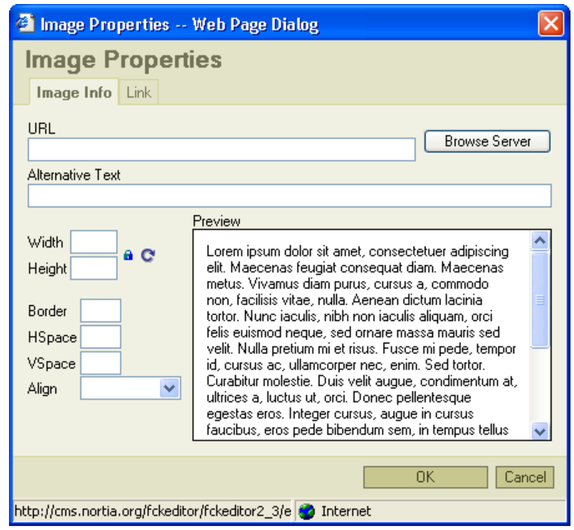
If you would like to remove a Hyperlink from text or a graphic, select the content you wish to remove the hyperlink from and then click on the Remove Hyperlink button.

Anchor

Anchors allow you to create links to specific sections in a page. To insert and anchor move your cursor to where you would like the anchor to be located. Then click on the Anchor button. This will open the Anchor Properties window. Type in an easy-to-remember name for the Anchor. Click OK to create the Anchor. To use the Anchor (to link to that specific area of the page,

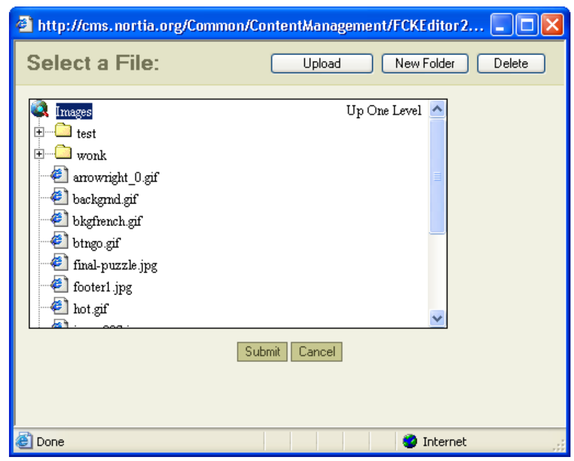


Insert Picture



Click on the Insert picture button to add a photo or other graphic to your content. Clicking on the Insert Picture button will open the Image – Web Page Dialog Box as seen to the right.

Tip: All pictures you use on your website should be "optimized for the web". This option is available in most photo-editing applications. You should make all pictures as small as possible (dimension and file size) to minimize the time it will take for the webpage to load.

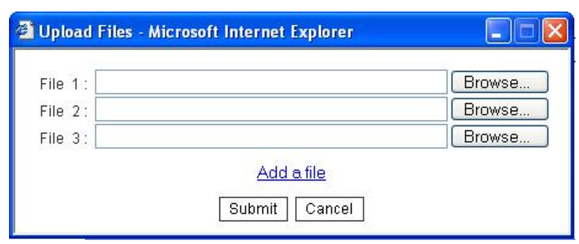


To select an image that has already been uploaded to the website server, or to upload a new image click on **Browse Server**. This will open the File Upload – Web Page Dialog window.

To use an existing photo click on its name, and then click on the 'Submit' button. You will be returned to the previous window.

To upload a new image, click on the **Upload a File** radio button.

This will open another window. You can choose and existing folder to upload your image into or you can create a 'New Folder'.



To upload a picture click on the 'Browse' button, you will be able to Browse your computer or network computers to find the file (image) you would like to use. Select the file you would like to upload and then click on the 'Open' button. Continue to upload as many files as you wish and click on 'Submit' to upload all the selected files.

Once all the files have been uploaded, click on the 'Submit' button. You will be returned to the **Insert Image** prompt. Select your picture from the navigation map and click on 'Submit'. Now adjust the size, padding, border, and alignment of the picture and click on 'OK'.

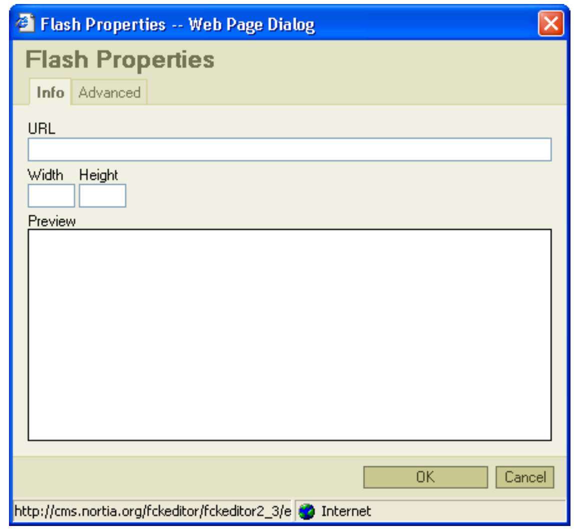
Tip: Once you have added an image to a page you can modify its properties by right clicking on the image in the Content Editor and selecting Image Properties from the option window that appears.

Insert/Edit Flash

You can insert a Flash file onto your web page by clicking on the Insert/Edit Flash button. The Flash Properties window will open. Enter in your flash web url.

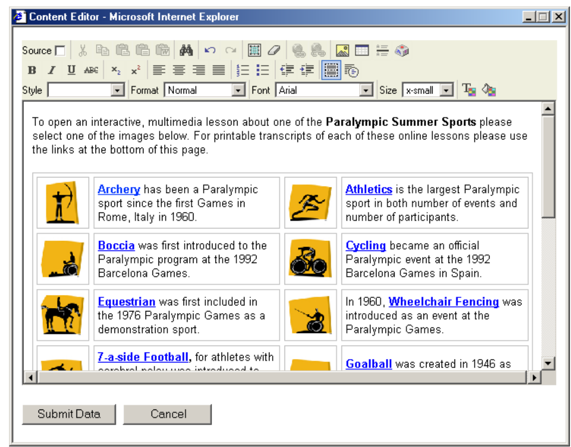
Please Note: Your flash file must be uploaded to the File Management System before it can be added to a webpage. Within the File Management system, click on the flash file and select Preview to retrieve the file's web url. Copy and paste this url into your Flash Properties window.

Set the desired width and height of the file in the fields provided and click on the 'OK' button.



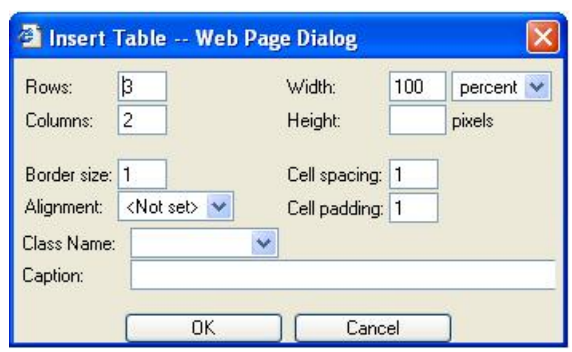
Insert Table

You can insert a table by clicking on the Insert Table button. Using a table will often help with formatting difficulties when using pictures or other images. You can see in the example to the right that a table was created with four columns. Pictures were then inserted into the first and third columns; and then text was typed into the second and fourth columns.



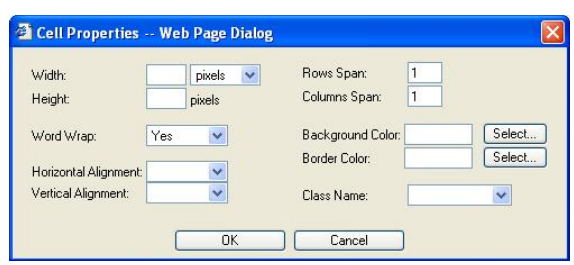
When creating a Table you can set the following properties:

- Number of Rows and Columns
- Border Size ('0' = no border)
- Alignment on the page
- Width (If you would like the table to span the entire width of the content area set the width to 100 percent)
- Height (The table height will grow with the content it contains, so it is recommended that this field be left blank)
- Cell Spacing (This is the distance between cells)
- Cell Padding (This is the distance between the edge of the cell and content it contains)
- Class Name (use a preset a table style)
- Caption (you can enter text that will appear when the user moves there mouse over top of the picture)



Once you have Inserted a Table onto a content page you can modify it's properties by moving your mouse to one side of the table, your cursor will change to a four-way arrow, right click and select Table Properties from the option list that appears.

To change the size and formatting for individual cells, move the cursor into that cell and then right click and choose **Cell Properties** from the option list. You can then change a number of properties as seen in the Cell Properties window to the right.



Once option that is frequently used, is the background colour.

Insert Horizontal Line

To break up you content move your mouse to the start/end of a paragraph and click on the Insert Horizontal Line button. A dark grey line will be inserted that spans the width of the content area.

Insert Special Character

To insert a character that is not found on the typical English keyboard click on this icon to select from a list of Special Characters.

Universal Keyboard

To type your page content in a language other than English, click on the Universal Keyboard and select the desired language from the list. Use the universal keyboard to type your content and click on the 'OK' button when finished.

The **Style, Format, Font,** and **Size** drop down lists all refer to text properties. Select the section of text you would like to change and then select the desired property from the appropriate drop down list. Please note: Styles have been customized for your web site or online application, if there is a Style you would like to change or a new Style you would like to add please contact your Port 80 or SportWeb customer service representative.

Text Colour

If you would like to change the colour of your text, select the desired text and click on the Text Colour button. You will then be able to select a colour from the colour palette.

Background Colour

This button can be used to change the Background colour of a section of text or for the cell in a table.