# **CTSU** Collaboration Portal User Guide

Revision Information for the Cancer Trials Support Unit Collaboration Portal User Guide

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# **Table of Contents**

TAE	BLE OF (	CONTENTS	. 2
TAE	BLE OF F	FIGURES	. 3
1.	INTROD	DUCTION	. 4
2.	ACCES	SING THE CTSU COLLABORATION PORTAL	. 5
3.	GENER	AL DOCUMENTS	.7
3	.1 Cor	MON ACTIVITIES	. 7
3	.2 Hov	V TO UPLOAD A DOCUMENT	. 7
3	.3 Hov	V TO CREATE A FOLDER	. 8
3	.4 Hov	V TO DELETE SOMETHING	. 9
4.	WORKI	NG WITHIN GROUPS1	10
4	.1 Hov	v to Access a Group1	10
4	-	ESS LEVELS	-
4	.3 Con	IMON ACTIVITIES WITHIN GROUPS	11
4	.4 Mee	TING-RELATED POSTINGS	11
	4.4.1	How to Upload a Meeting Document	11
	4.4.2	How to Change the Meeting Date of an Already Uploaded Document	12
4	.5 Fol	DERS1	
	4.5.1	How to Create a New Folder within a Group	
	4.5.2	How to Upload a Document into a Group Folder	
4		IER DOCUMENT-RELATED ACTIONS WITHIN GROUPS	
	4.6.1	How to Download a Copy of a Document	
	4.6.2	How to Change the Name of a Document	
	4.6.3	How to Delete a Document or Folder	
	4.6.4	How to Check Out a Document	
	4.6.5	How to Check In a Document	18
5.	ALERTS	51	19
5	.1 Hov	V TO SET UP ALERTS ON DOCUMENT CHANGES 1	19

# Table of Figures

FIGURE 1: LOG IN TO THE CTSU WEBSITE	5
FIGURE 2: LOCATION OF COLLABORATION PORTAL LINK	5
FIGURE 3: COLLABORATION PORTAL WELCOME PAGE	5
FIGURE 4: COLLABORATION PORTAL LANDING PAGE	6
FIGURE 5: TOP-LEVEL GENERAL DOCUMENTS	7
FIGURE 6: ACTION ICONS WITHIN GENERAL DOCUMENTS	7
FIGURE 7: DOCUMENT UPLOAD SCREEN WITHIN GENERAL DOCUMENTS	8
FIGURE 8: NEW FOLDER COMMAND	8
FIGURE 9: NAMING A NEW FOLDER	8
FIGURE 10: NEW FOLDER APPEARING IN GENERAL DOCUMENTS	9
FIGURE 11: DELETING AN ITEM IN GENERAL DOCUMENTS	9
FIGURE 12: VIEWING AVAILABLE GROUPS	.10
FIGURE 13: SUB-FOLDERS WITHIN A GROUP	.10
FIGURE 14: ACTION ITEMS WITHIN FILES	.11
FIGURE 15: CONTENTS OF A MEETING FOLDER	
FIGURE 16: UPLOADING A MEETING DOCUMENT	.12
FIGURE 17: DETAILS ABOUT MEETING DOCUMENT UPLOAD	.12
FIGURE 18: NEW MEETING DATE AND DOCUMENT	
FIGURE 19: CHANGE MEETING DATE	.13
FIGURE 20: UPDATED MEETING DATE	.13
FIGURE 21: CREATE NEW FOLDER WITHIN A GROUP	.13
FIGURE 22: NAMING NEW FOLDER	.14
FIGURE 23: APPEARANCE OF NEW FOLDER	.14
FIGURE 24: UPLOAD NEW DOCUMENT INTO A FOLDER	.14
FIGURE 25: NEW DOCUMENT WITHIN A FOLDER	.15
FIGURE 26: DOWNLOADING A DOCUMENT	.15
FIGURE 27: EDIT DOCUMENT PROPERTIES TO CHANGE DOCUMENT NAME	
FIGURE 28: CHANGING DOCUMENT NAME	-
FIGURE 29: DELETING A DOCUMENT	
FIGURE 30: CHECKING OUT A DOCUMENT	.17
FIGURE 31: CHECKED OUT DOCUMENT INDICATOR	
FIGURE 32: CHECK IN DOCUMENT; COMMENTS FIELD	.18
FIGURE 33: SET UP NEW ALERT	
FIGURE 34: ADD ALERT	
FIGURE 35: SELECT ITEMS FOR ALERT	
FIGURE 36: CONFIGURE ALERT SETTINGS	
FIGURE 37: ALERTS SCREEN	.20

# 1. Introduction

The CTSU Collaboration Portal is a secure place to store, organize, share, and access documents that pertain to CTSU working groups and other CTSU activities. It is built in SharePoint and connected to the CTSU website. It is generally reserved for CTSU and Lead Protocol Organization (LPO) staff, but may on occasion be accessible to site staff members with special permission.

Note that certain types of functionality differ depending on where you are in the Portal (e.g., between the General Documents folder and group-specific folders), so please note the area-specific instructions throughout this document.

# 2. Accessing the CTSU Collaboration Portal

The CTSU Collaboration Portal is part of the CTSU website at <u>https://www.ctsu.org</u>. To gain access, log in to the members' website using your CTEP-IAM credentials (see Figure 1).



Figure 1: Log In to the CTSU website

The Collaboration link appears on the header banner (see Figure 2). Click on the link to access the portal.



Figure 2: Location of Collaboration Portal Link

From the welcome page, click on Connect to Collaboration Portal (see Figure 3).

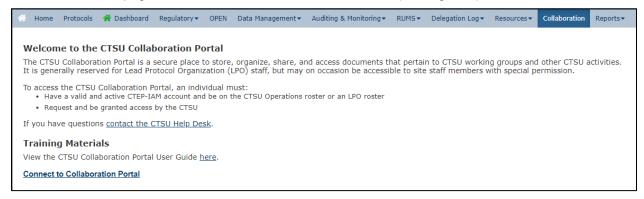


Figure 3: Collaboration Portal Welcome Page

Once connected to the portal, the landing page will appear (see Figure 4). If you have not been granted particular access, the group-specific folders will not be visible (as described in Section 4).

				۵	?	HOPKINS	J <b>-</b>
BROWSE PAGE							
CTSU CSC Gen. Shared Fil	es Network ACT		Se	earch		Q	
Site Content b D CDMS Support Center b D General Shared Files b D Network ACT C Documents b General Documents c Site Assets Site Collection Documents b Versioned Shared Documents b Announcements	CTSU General Docu Type M Add documen	Name CTSU_SharePoint_UserGuide	Modified By HOPKINSJ				

Figure 4: Collaboration Portal Landing Page

# 3. General Documents

General documents are those which do not pertain to any particular group and are accessible to all with access to the Collaboration Portal. They are visible upon first accessing the Portal, and are also in a top-level folder on the left side of the screen (see Figure 5).

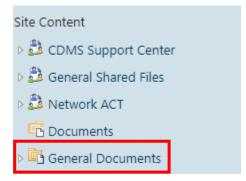


Figure 5: Top-level General Documents

## 3.1 Common Activities

Most activities related to *General Documents* (e.g., uploading, creating folders, or downloading) are accessed by using the icons along the top when viewing the folder (see Figure 6). Note that this functionality is different from what appears when working in group-specific folders (as described in Section 4).

BROWSE FILES LIBRARY	
стѕи сsc Gen. Shared Files General Docur	
Site Content	🕀 New 🛕 Upload 😂 Sync 🗘 Share More 🗸
CDMS Support Center	All Documents Explorer View ···· Find a file
General Shared Files	
Network ACT	✓ 🗋 Name Modified By
Documents	CTSU_SharePoint_UserGuide June 5
▷ 📴 <u>General Documents</u>	Drag files here to upload
🖪 Site Assets	

Figure 6: Action Icons within General Documents

## 3.2 How to Upload a Document

Click on the top-level General Documents folder so that it is highlighted in left hand pane.

Click *Upload* (see Figure 7) and then *Choose File* to select the document from your computer. Click *OK* and the document will be saved to the General Documents folder.

Site Content	⊕ New     ▲ Upload     ♥ Syn     All Documents     Explorer View     …	c 🖸 Share More 🗸 Find a file 🔎
Documents	Add a document	×
General Documents	Choose a file	Choose Files No file chosen
Site Assets		Overwrite existing files
Versioned Shared Documents	Destination Folder	/ Choose Folder
<ul> <li>Announcements</li> <li>Calendar</li> </ul>		
Sel Contacts		OK Cancel
Content and Structure Reports Images		

Figure 7: Document Upload Screen within General Documents

### **3.3** How to Create a Folder

Click on the top-level General Documents link, click on New, and select New folder (see Figure 8).

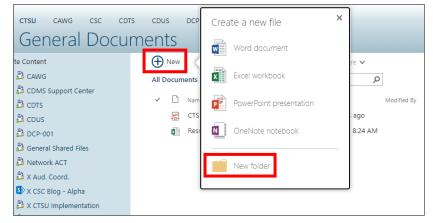


Figure 8: New Folder Command

Give the folder a name and click Create (see Figure 9).

Create a folder		×
Name *		
Test_Folder		
A INVITE PEOPLE		
	Create Ca	ncel

Figure 9: Naming a New Folder

The new folder will now appear within the top-level General Documents folder as well as in the main pane

#### (see Figure 10).

CTSU CSC Gen. Shared File		work A	ст				
Site Content          Site Content         CDMS Support Center         General Shared Files         Second State         Documents         General Documents         Test_Folder         Site Assets	Ŭ	New Docum		Find a	Modified A few se June 5	More V	<b>Р</b> Modified By

Figure 10: New Folder Appearing in General Documents

# 3.4 How to Delete Something

Select the item by clicking the check mark that appears when hovering over it with your mouse. Hit the *More* drop-down to select *Delete*, and then click *OK* in the pop-up to confirm (see Figure 11).

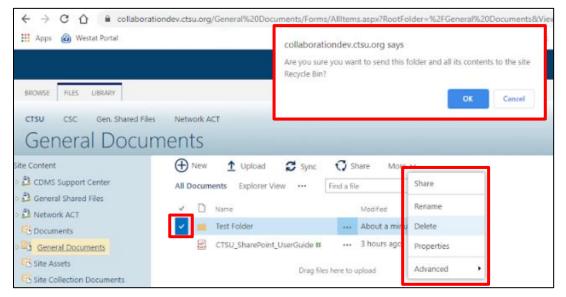


Figure 11: Deleting an Item in General Documents

# 4. Working within Groups

People who have been granted access to the Collaboration Portal are part of one or more *groups*. These groups are typically based on actual CTSU working groups, but there are exceptions. For example, there are some protocol-related groups.

### 4.1 How to Access a Group

Groups appear both on the top banner and on the left side of the screen (see Figure 12); you will only see the groups to which you have access. Simply click the name of the group to access the contents within.

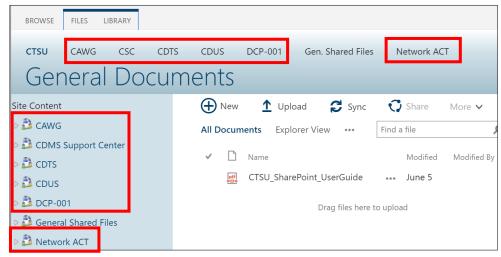


Figure 12: Viewing Available Groups

Once you access a group, the node will expand and you will see either sub-groups or sub-folders within (see Figure 13). Organization will differ by group, but will typically include folders for general documents and folders for meetings.

CTSU	CSC	Gen. Shared Files							
Site Conten	t								
a 🝰 CDMS	Support	Center							
Þ 🝰 Aud	lit Focus V	WG							
a 🝰 Cor	e Configu	ration							
> 📴 G	eneral Do	cuments							
> 🖻 M	leetings								
🖻 Si	🖻 Site Assets								
🕞 🝰 Dati	a Element	ts/Library							
🛛 🕹 Dat	a Quality								

Figure 13: Sub-folders within a Group

## 4.2 Access Levels

There are three levels of access to documents within groups:

• Owner

- Member (allowed to view, upload, and delete documents)
- Visitor (view only)

Note that your access levels may vary per group.

## 4.3 Common Activities within Groups

Some activities related to group materials (e.g., uploading documents or creating folders) are available under the *Files* link at the top of the page (see Figure 14). Note that this functionality is different from that found when working in the all-access *General Documents* folder (as described in Section 3). Also note that certain activities are limited based on your role/access level within a given group.

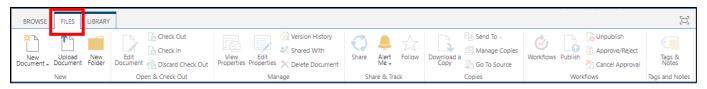


Figure 14: Action Items within Files

### 4.4 Meeting-Related Postings

Most meeting folders are automatically organized by meeting date and you can post documents for a given meeting date (e.g., agenda, minutes, other documentation). To see what documents have been posted for a specific meeting, go the folder for the group or sub-group, and select the *Meetings* sub-folder, click on the plus sign next to a meeting date to view the posted documents (see Figure 15).

CTSU CSC Gen. Shared Files	s Network A	СТ				Search
Meetings						
Site Content	Edit	Туре	Name	Type Of Document	Modified	Modified By
General Documents     Meeting Date : 6/26/2020 (1)						
Site Contents		<b>a</b>	Agenda28May2020	Agenda	5/27/2020 4:47 PM	CELIIK
		<u>-</u>	Minutes28May2020	Minutes	6/4/2020 11:52 AM	CELIIK
	1	<b>-</b>	SEUEWG_20200528	Supporting Documents	6/4/2020 11:52 AM	CELIIK
	Meeting	g Date : 4/23/	<b>2020</b> (3)			

Figure 15: Contents of a Meeting Folder

#### 4.4.1 How to Upload a Meeting Document

Go to the folder for the group or sub-group, and select the *Meetings* sub-folder as described in section 4.4.

Click the *Files* link in the upper left corner choose *Upload Document,* a pop-up window will appear (see Figure 16).

BROWSE New Document	FILES Upload Document	.IBRARY New Folder	Edit Documen	Check Out Check In Check In Check Out	View Properties	Edit Properties	C Version History	Share	Alert Me +	Follow	Download Copy		
Site Content				Add a docun Choose			Choose Fi			en			× ]
											ОК	Cancel	

Figure 16: Uploading a Meeting Document

Select a file from your computer and click OK.

In the resulting screen (see Figure 17), provide a *Title* (optional), pick a meeting date using the calendar, select the *Type of Document* (e.g., Agenda, Supporting Documents, Minutes), and click *Check In*.

Add a	docur	ment					×
EDIT							
Check In	X Cancel	Paste	X				
Com	mit	Clipboard	Actions				
	i be to	low are correc other users ur	t and that all	required fields		out to you. Check . The file will not b	
	Name	*	TestMeeting	gDocument	.pdf		
	Title		Agenda_20200619				
	Meetin	ig Date *	6/19/2020				
	Type O	of Document *	Agenda	~			
		at 6/15/2020 1 dified at 6/15/2		HOPKINSJ	I	Check In	Cancel

Figure 17: Details About Meeting Document Upload

If the document uploaded is the first document for a particular date a new *Meeting Date* is created (see Figure 18). Otherwise, the document is added under an existing date.

Site Content	Edit	Туре	Name	Type Of Document	Modified	Modified By	
General Documents	🗆 Meetin	ng Date : 6/1	<b>19/2020</b> (1)				
▷ Image Meetings Image Meetings Site Assets		•	TestMeetingDocument	Agenda	6/15/2020 1:02 PM	HOPKINSJ	
Site Contents	⊞ Meetin	ng Date : 5/2	<b>28/2020</b> (3)				

Figure 18: New Meeting Date and Document

#### 4.4.2 How to Change the Meeting Date of an Already Uploaded Document

If a meeting date changes you can change the date for uploaded documents by clicking on the Edit icon

prext to the meeting document and then using the calendar to select a new date and select *Save* (see Figure 19).

BROWSE EE	TIC												
Save Cancel	Paste X Cut	Delete Item											
Commit	Clipboard	Actions											
Site Content	ocuments		Name *	Tes	stMe	eting	Docu	umen	t		.pdf		
Meetings			Title	Agenda_20200619									
🖻 Site Assets	Site Assets		Meeting Date *	6/2	26/2	020							
Site Contents			Type Of Document	4		Ju	ne 20	20		•			
			Created at 6/15/2020 Last modified at 6/15,	<u>S</u> 31 7	1 8	_T2 9	W 3 10	_T4 11	. <u>F</u> 5	<u>S</u> 6 13	Sav	e	Cancel
				́г	15	16	17	18	19	20			-
				21	22	23	24	25	26	27			
				28	29	30	1	2	3	4			
				То	day is	Mor	nday, J	lune 1	15, 20	20			

Figure 19: Change Meeting Date

The document will now appear in the appropriate meeting folder (see Figure 20).

Site Content	Mee	etings						
General Documents	Edit	Туре	Name	Type Of Document	Modified	Modified By		
Meetings	⊟ Me	□ Meeting Date : 6/26/2020 (1)						
🖻 Site Assets	<b>I</b>	pdf	TestMeetingDocument 🗰 🕬	Agenda	6/15/2020 2:38 PM	HOPKINSJ		
Site Contents	⊞ Me	eting Date :	5/28/2020 (3)					

Figure 20: Updated Meeting Date

#### 4.5 Folders

Folders may be created as needed within groups (however, folders are not allowed in the traditional meeting sections, i.e., those organized by date by the application itself, as shown in Figures 15, 18, and 20).

#### 4.5.1 How to Create a New Folder within a Group

Click into one of the non-meeting document folders in your group or sub-group of interest until it is highlighted on the left pane. Click on *Files* and then *New Folder* (see Figure 21).

BROWSE	FILES	LIBRARY	1			
New Document +	Uplead Documen	New Folder	Edit Document	View Edit Properties Properties X Delete Document	Share Alet Follow	Download a Copy
	New		Open & Check Out	Manage	Share & Track	
Site Content	t		Type	Name		
o Gene	ral Docur	ments	-	Sample Deliverables		
o 🛄 Meeti	ngs		<b>a</b>	Final Documents		
Site A	ssets		<b>1</b>	Archived Documents		

Figure 21: Create New Folder within a Group

Supply a name for the folder in the field and click Save (see Figure 22).

CTSU CSC Gen. Shared File	s Network ACT	Search	Q
New Folder			
Site Content       Image: Site Content	Name * Workflows	Save	Jancel

Figure 22: Naming New Folder

The folder will now appear (see Figure 23).

CTSU CSC Gen. Shared File	s Network	ACT
General Docu	ments	
Site Content	Туре	Name
General Documents		Sample Deliverables
Archived Documents		Final Documents
Final Documents		Archived Documents
Sample Deliverables		Workflows
Workflows		SCWG Scope Items with descriptions 4-21-2011 final

Figure 23: Appearance of New Folder

#### 4.5.2 How to Upload a Document into a Group Folder

Click into the folder where you want to add a new document. Click on *Files* and then *Upload Document* (see Figure 24).

BROWSE	FILES	LIBRARY										
New Document	Upload Document	New Folder	Edit Documer		View Properties	Edit Properties	/ Delete Document		Alert Me +	Follow	Download a Copy	🔓 Go To
	INEW		C	Open & Check Out		Mai	nage	Sh	are & Tra	ack		Copies
Site Conten		ents	A	Add a documen	t							×
Arc 📕	hived Doc	uments		Choose a file			Choose File S	ample-Do	cumen	t.docx		
🗾 📕 Fina	al Docume	ents										- 1
<u>w</u>	orkflows						Overwrite exis	ting files				
> 🖻 Meet	ings								-		-	
🖪 Site A	ssets								Γ	OK	Cano	el
Site Conten	ts											

Figure 24: Upload New Document into a Folder

The document will now appear in the folder (see Figure 25).

BROWSE	FILES LIBRA	RY											
New Document + D	Upload New Document Folde	Edit Documen	🖹 Check Out 🔓 Check In t 📸 Discard Check Out	View Properties Properties	C) Share	Alert Me +	Follow	Download a Copy	Send To - Manage Copies	<b>Workflows</b>	Publish	Unpublish Approve/Reject	
N	New	0	pen & Check Out	Manage	Sł	are & Tra	ack		Copies		Work	flows	Tags
Site Content			Туре	Name	Created	i		Crea	ated By	Modified		Modified	d By
🖌 🖻 General	l Documents		W	Sample-Document # NEW	6/18/20	20 6:27	7 PM	но	PKINSJ 6	/18/2020 6:	27 PM	HOPKI	NSJ
Archiv	ved Documen	s											
📕 📕 Final (	Documents												
Work	<u>kflows</u>												

Figure 25: New Document within a Folder

## 4.6 Other Document-Related Actions within Groups

Your access role in a given group will dictate which actions you are able to perform.

Many of these activities require that you select the top level of a given group or sub-group, which will bring up the group's meetings <u>and</u> the group's documents in *one long list* in the main pane, meaning that you must scroll down to see all of them.

Once you are at the desired level, most of the functionality is accessed by clicking on the *Open Menu* icon (downward triangle) appearing to the right of a document title. The resulting list of actions will allow you to download, check out/in, or delete the item.

#### 4.6.1 How to Download a Copy of a Document

Once you scroll down to find the document, click on the *Open Menu* icon and select *Download a Copy* (see Figure 26).

	View in Browser	1
Meeting Date : 4/13/2011 (11)	Edit in Browser	
■ Meeting Date : 3/31/2011 (3)	View Properties	
(More Items)		
	Edit Properties	
🕈 Add new item	Compliance Details	
	Check Out	
General Documents	Follow	
Type Name Modified	Workflows	dified By
WEST1424Standard_NonStandardCoreConfigurationSettings_v5_Apr2020 v4/24/2020	Download a Copy	ιк
WEST1424StandardCoreConfiguration_v5_Apr2020 4/24/2020	Shared With	лк
🕈 Add new item	Delete	

Figure 26: Downloading a Document

#### 4.6.2 How to Change the Name of a Document

Once you scroll down to find the document, click on the *Open Menu* icon and select *Edit Properties* (see Figure 27).

<b>⊞ Meeting</b>	Date : 2/24/2011 (1)	View in Browser		
	Date : 2/16/2011 (1)	View Properties		
🖶 Add ne	w item	Edit Properties		
		Compliance Details		
		Check Out		
General	Documents	Follow		
Туре	Name	Workflows		Modified By
	Sample-Document 🖩 🕬	Download a Copy	10:20 AM	
Add new item		Shared With		
		Delete	]	

Figure 27: Edit Document Properties to Change Document Name

Enter the new name of the document and click Save (see Figure 28).

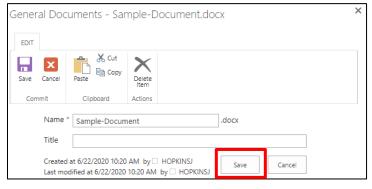


Figure 28: Changing Document Name

#### 4.6.3 How to Delete a Document or Folder

Once you are at the desired document or folder, click on the *Open Menu* icon and select *Delete* (see Figure 29).You will be asked to confirm that you want to delete the item. Select *OK* to proceed with the deletion.

Meeting Date :	collaborationdev.ctsu.org says	5						
Meeting Date :	Are you sure you want to send the	item(s) to the site Recycle	e Bin?					
Meeting Date :								
Meeting Date :	OK Cancel							
Meeting Date :								
Meeting Date :	<b>3/3/2011</b> (1)							
Meeting Date :	<b>3/1/2011</b> (2)	View in Browser						
Meeting Date : 2	2/24/2011 (1)	Edit in Browser						
Meeting Date : 2	2/16/2011 (1)	- Edit in Browser						
🕈 Add new item		View Properties						
		Edit Properties						
General Docu	ments	Compliance Details						
Type Name		Check Out	Modified By					
Add new item	e-Document 🛚 🕬	Follow						
		Workflows						
		Davialand a Carry						
		Download a Copy						
		Shared With						
		Delete						

Figure 29: Deleting a Document

#### 4.6.4 How to Check Out a Document

Once you scroll down to the document, click on the *Open Menu* icon (downward triangle) and select *Check Out* (see Figure 30).

Туре	Name	Modified
	Archived Documents	12/7/. View in Browser
	Final Documents	12/7/. View Properties
1	Copy of Report Shell - 20130212	Edit Properties
	CSC Working Groups_03Aug2011_Roster	8/4/2 Compliance Details
pdf	CSC_LWG_Agenda_Feb2020	6/19/. Check Out
W	Data Quality Charter_v01JAN282011	✓ /28/. Follow
	Data Quality Working Group Survey Results	2/7/2 Workflows
	DATE_QUERY_FREE2	4/30/. Download a Copy
	DQWG Survey Questions	2/21/. Shared With
	RSPM Revison 2	10/16, Delete

#### Figure 30: Checking Out a document

A green arrow icon will indicate when a given document is checked out (see Figure 31).

Data Quality Charter\_v01JAN282011

Figure 31: Checked Out Document Indicator

Note: When a document is checked out by an owner or a member, the document will be visible to others, but will not be available for any actions, (e.g., updates or deletion).

#### 4.6.5 How to Check In a Document

Follow the same steps as in Section 4.6.4, but select the *Check In* option in the menu. Complete the comments in the pop-up if appropriate (see Figure 32) and then select *OK* to complete the check-in process. The document will now be available for actions by others.

Check in		
Retain Check Out Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.	Retain your check out after checking in?	
Comments Type comments describing what has changed in this version.	Comments:	<i>i</i>
	OK	Cancel

Figure 32: Check In Document; Comments Field

Note that if you go to check in a document but did not make any changes, you can always select *Discard Check Out* under the menu options. You will be asked to acknowledge that any changes will not be saved prior to completing the discard action.

# 5. Alerts

Alerts can be set up to notify you of changes made to individual documents, folders, or entire libraries. There are slight variations depending on where you are starting from, but the steps are generally the same.

# 5.1 How to Set Up Alerts on Document Changes

Click on Files or Library, then click on Alert Me, and then Manage My Alerts (see Figure 33).

BROWSE FI	LES LIBRARY							
View Quick Edit	Create View		Tags & Notes	E-mail a Link	Alert Me +	RSS Feed Sync	0 🖂	Export to Excel
View Format	Manage	Views	Tags and Notes	Sh	🐥 Se	et alert on this library	Connect & Export	
<ul> <li>S X Aud. Coord.</li> <li>X CSC Blog - Alpha</li> </ul>			The America Manage My Alerts					
X CTSU Im	plementation					Manage My Ale	erts	
D 🝰 X ETCTN						Go to the My A	lerts page to manage	
> 🝰 X Group Transition WG					the list of libraries, files, lists, and items for which you receive alerts.			
🖻 🍰 X Manage	ment Meetings							

Figure 33: Set Up New Alert

Click on Add Alert (see Figure 34).



Figure 34: Add Alert

Choose a list or document from the list by clicking on the circle next to the selection, and click *Next* (see Figure 35).

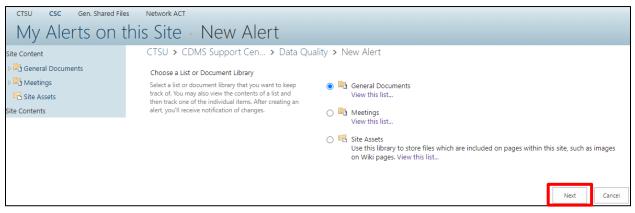


Figure 35: Select Items for Alert

New Alert CTSU > CDMS Support Cen... > Data Quality > General Document... Site Content General Documents Cancel > 🖻 Meetings ОК 🖻 Site Assets Alert Title Site Contents DQWG: General Documents Update Enter the title for this alert. This is included in the subject of the notification sent for this alert. Delivery Method Send me alerts by: Specify how you want the alerts delivered. JENNYHOPKINS@WESTAT.COM E-mail Text Message (SMS) Send URL in text message (SMS) Change Type Only send me alerts when: Specify the type of changes that you want to be All changes alerted to. ○ New items are added O Existing items are modified Items are deleted Send Alerts for These Changes Send me an alert when: Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view. Anything changes O Someone else changes a document ○ Someone else changes a document created by me O Someone else changes a document last modified by me When to Send Alerts Send notification immediately Specify how frequently you want to be alerted. (mobile alert is only available for immediately O Send a daily summary send) Send a weekly summary Time:

Configure the alert settings (see Figure 36) and select OK.

**Figure 36: Configure Alert Settings** 

The new alert will now appear in your alerts screen, and can be edited or deleted from there at any time (see Figure 37).

My Alerts on this Site							
Site Content	CTSU > CDMS Support Cen > Data Quality > My Alerts on this Site						
<ul> <li>▷ General Documents</li> <li>▷ General Documents</li> <li>□ Hettings</li> <li>□ Site Assets</li> <li>Site Contents</li> </ul>	🐭 Add Alert   🗙 Delete Selected Alerts						
	Frequency: Immediate	Delivery Method(s)					
	DQWG: General Documents Update	E-mail					

Figure 37: Alerts Screen