

# CTSU Collaboration Portal User Guide

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**CTSU Collaboration Portal Users**

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## 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 <https://www.ctsu.org>. To gain access, log in to the members' website using your CTEP-IAM credentials (see Figure 1).

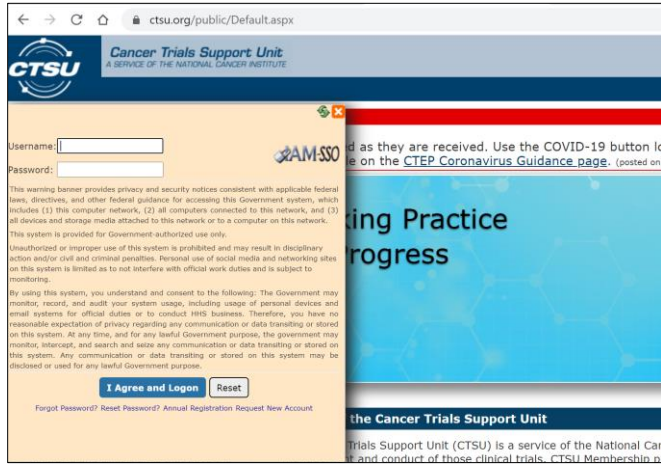


Figure 1: Log In to the CTSU website

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

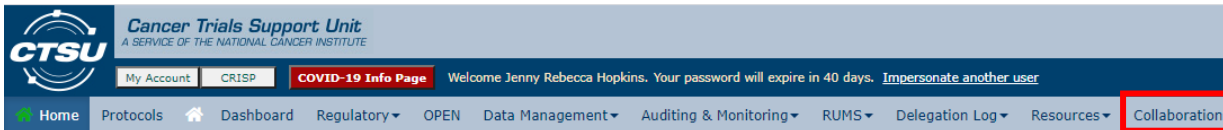


Figure 2: Location of Collaboration Portal Link

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

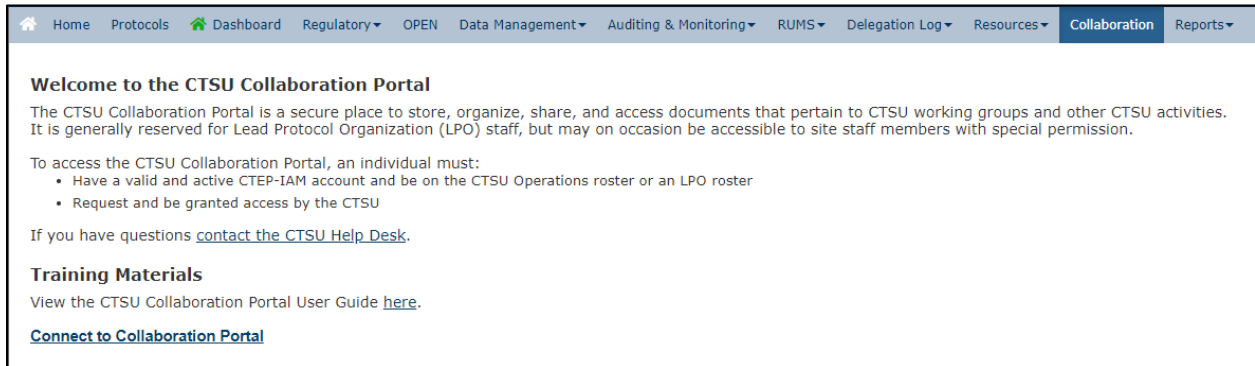


Figure 3: Collaboration Portal Welcome Page

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).

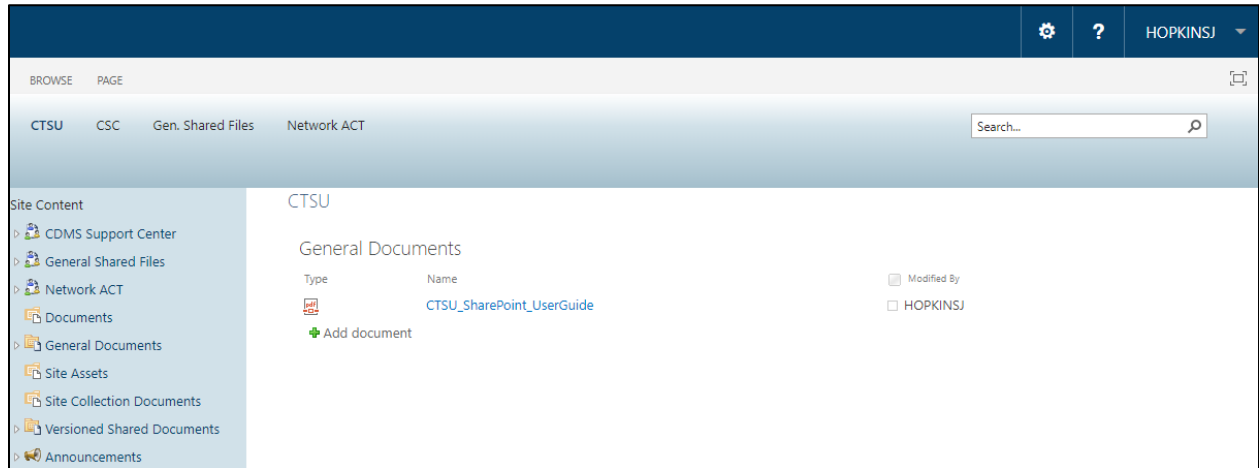


Figure 4: Collaboration Portal Landing Page

### 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).

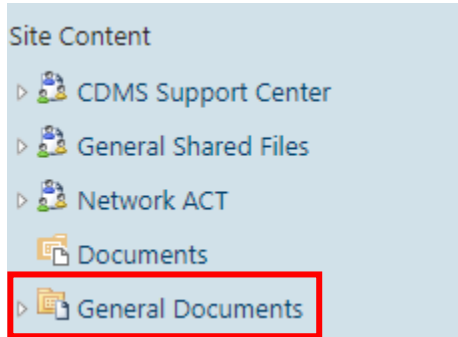


Figure 5: Top-level General Documents

#### 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).

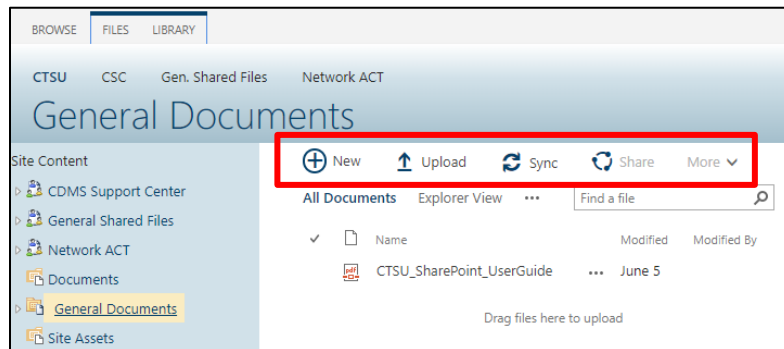
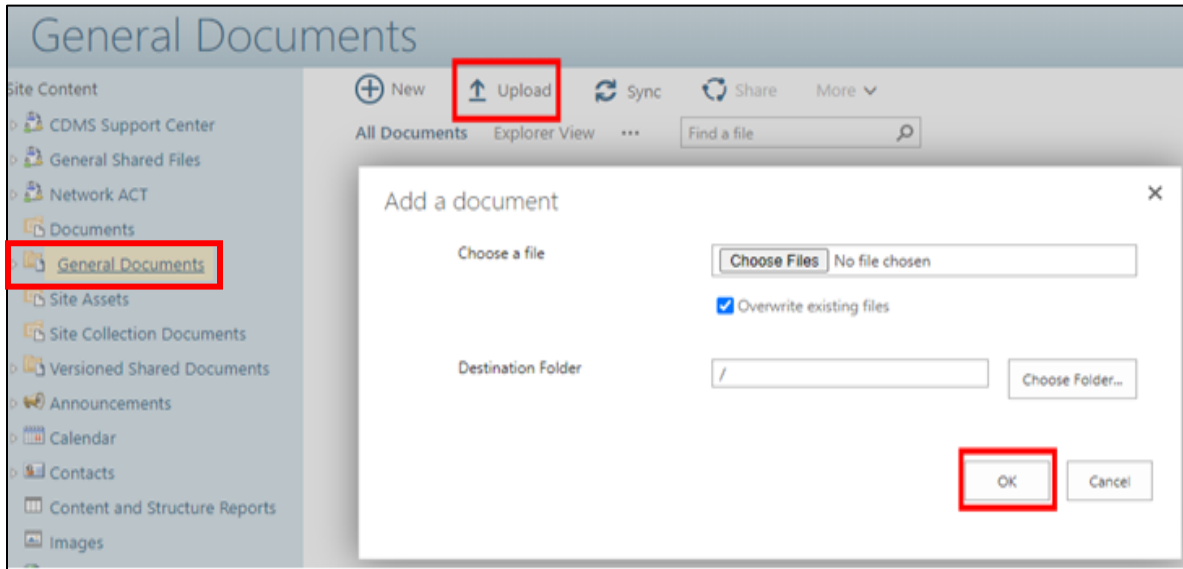


Figure 6: Action Icons within General Documents

#### 3.2 How to Upload a Document

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

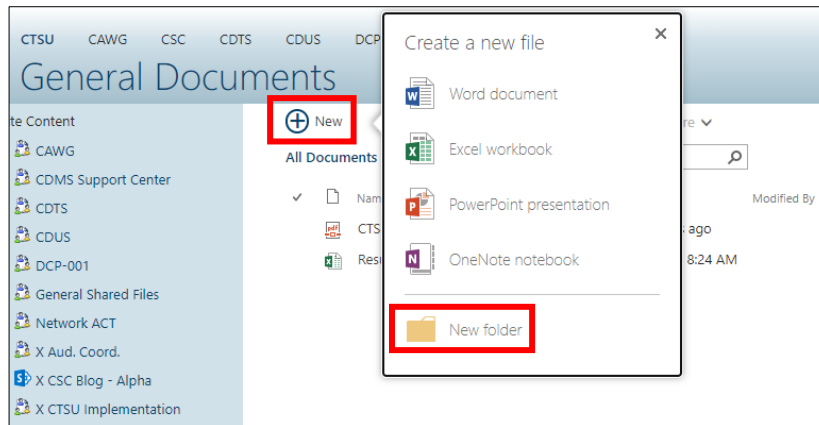
Click *Upload* (see Figure 7) and then *Choose File* to select the document from your computer. Click *OK* and the document will be saved to the General Documents folder.



**Figure 7: Document Upload Screen within General Documents**

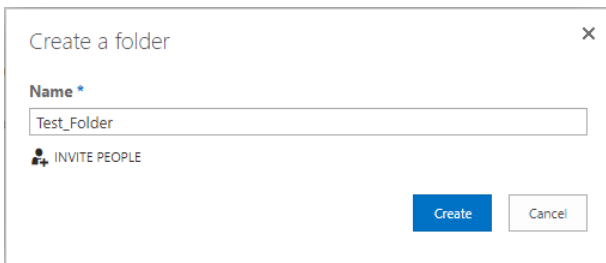
### 3.3 How to Create a Folder

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).



**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).

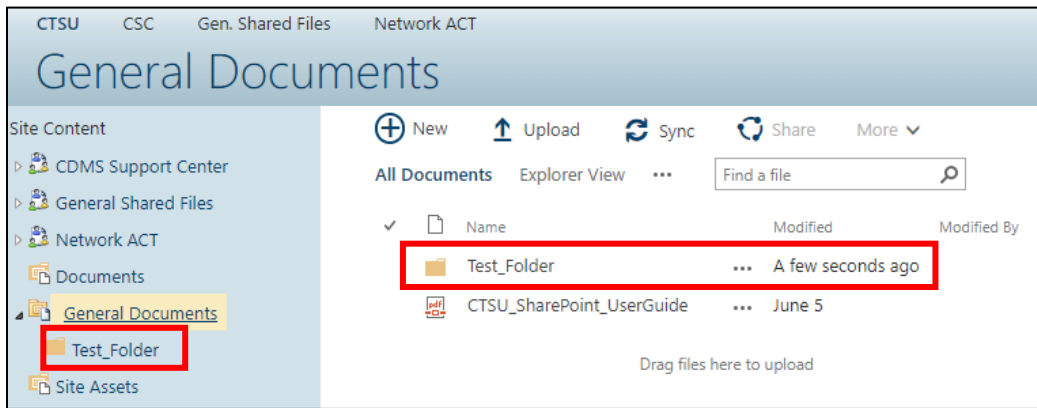


Figure 10: New Folder Appearing in General Documents

### 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).

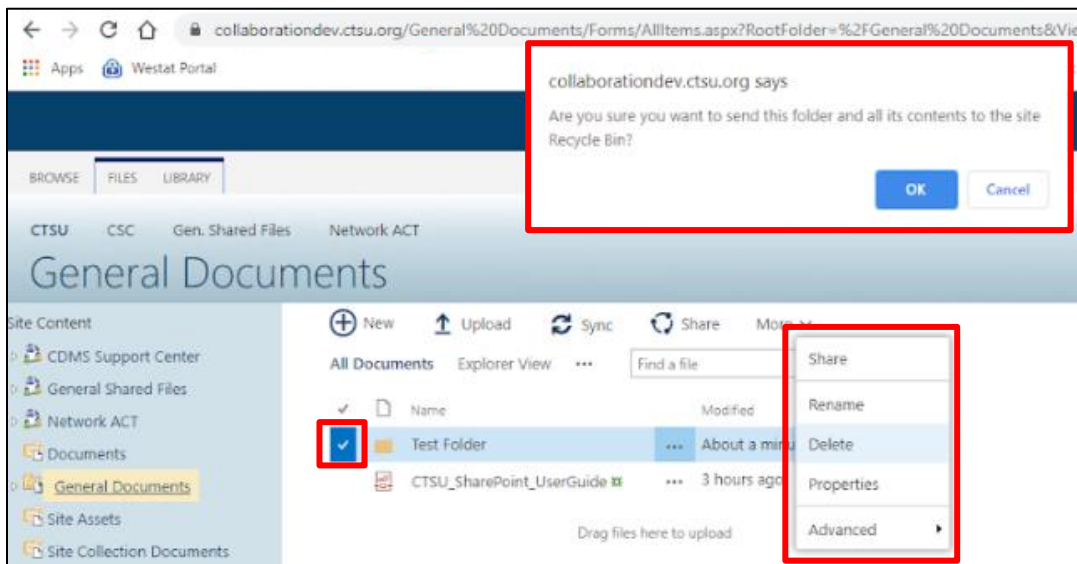


Figure 11: Deleting an Item in General Documents

## 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.

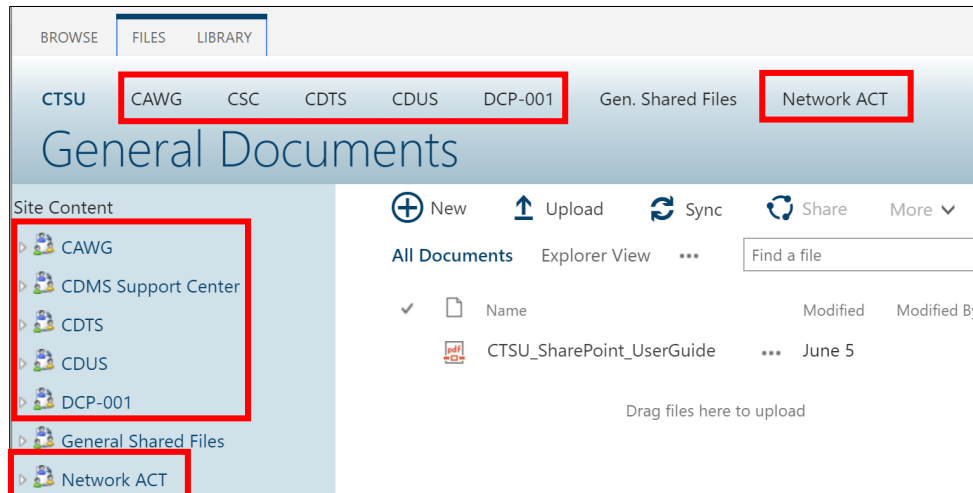


Figure 12: Viewing Available Groups

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.

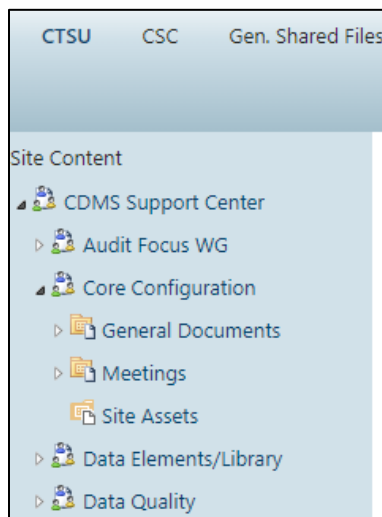


Figure 13: Sub-folders within a Group

### 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.

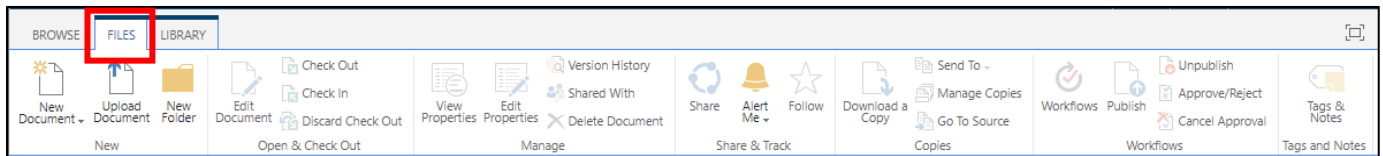


Figure 14: Action Items within Files

### 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).

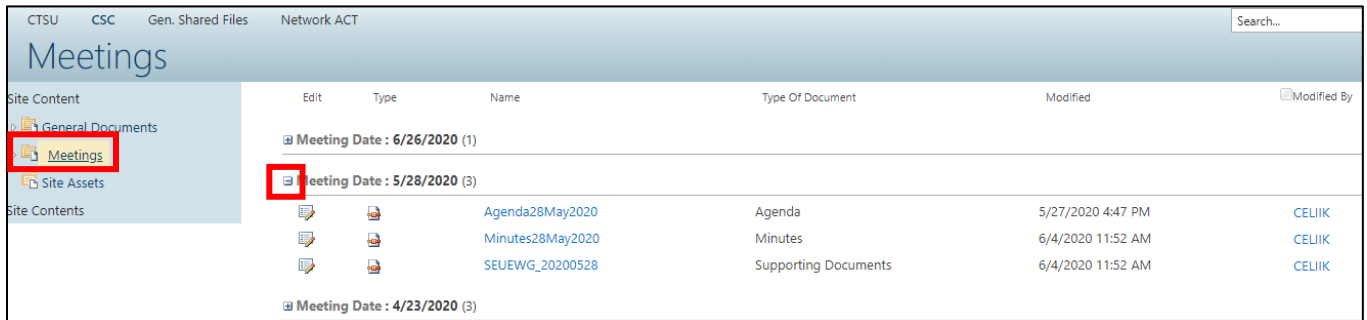
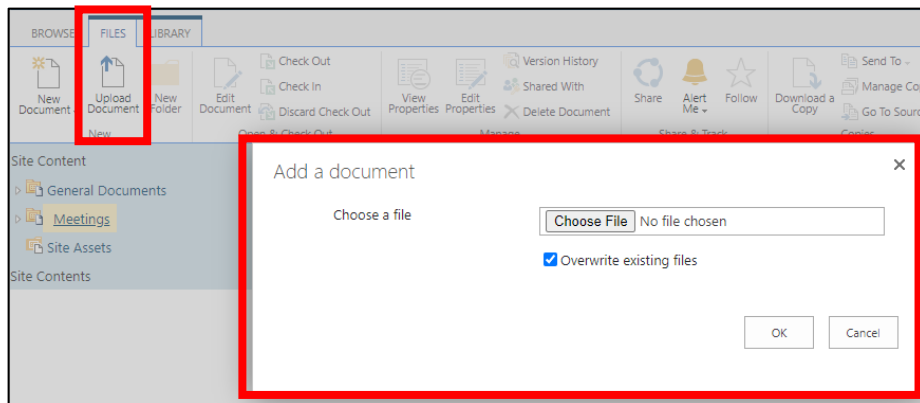


Figure 15: Contents of a Meeting Folder

#### 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).



**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*.

The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Name \* TestMeetingDocument .pdf

Title Agenda\_20200619

Meeting Date \* 6/19/2020

Type Of Document \* Agenda

Created at 6/15/2020 12:56 PM by HOPKINSJ

Last modified at 6/15/2020 12:59 PM by HOPKINSJ

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.

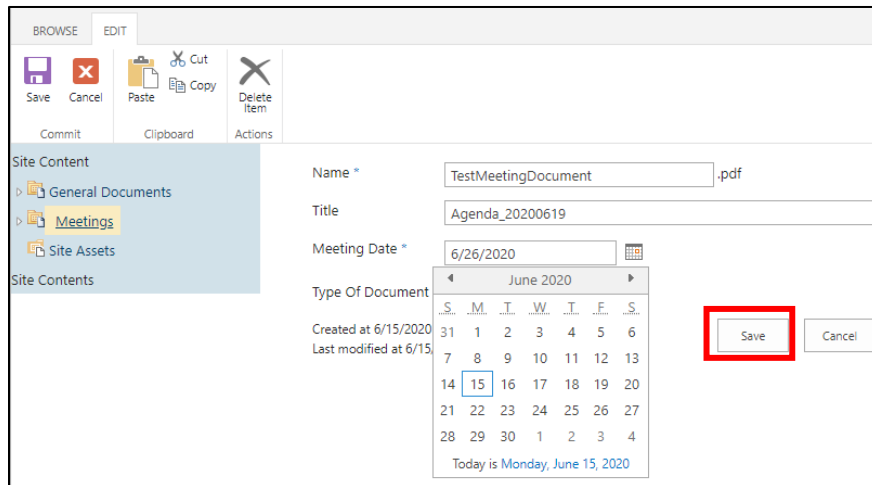
Site Content	Edit	Type	Name	Type Of Document	Modified	Modified By
General Documents						
Meetings			Meeting Date : 6/19/2020 (1)			
Site Assets			TestMeetingDocument NEW	Agenda	6/15/2020 1:02 PM	HOPKINSJ
Site Contents			Meeting Date : 5/28/2020 (3)			

**Figure 18: New Meeting Date and Document**

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

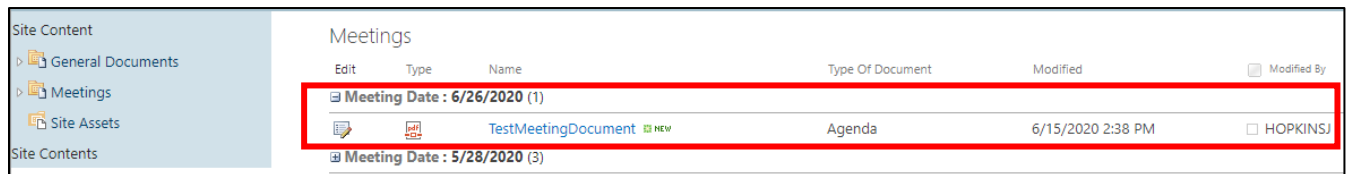
If a meeting date changes you can change the date for uploaded documents by clicking on the Edit icon

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



**Figure 19: Change Meeting Date**

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



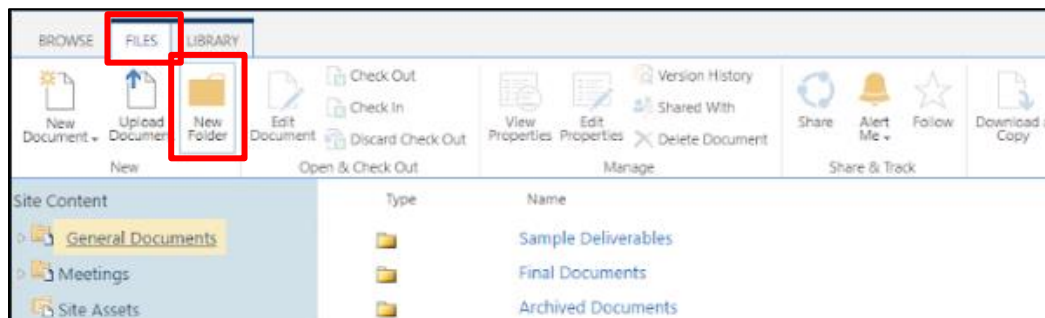
**Figure 20: Updated Meeting Date**

## 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).

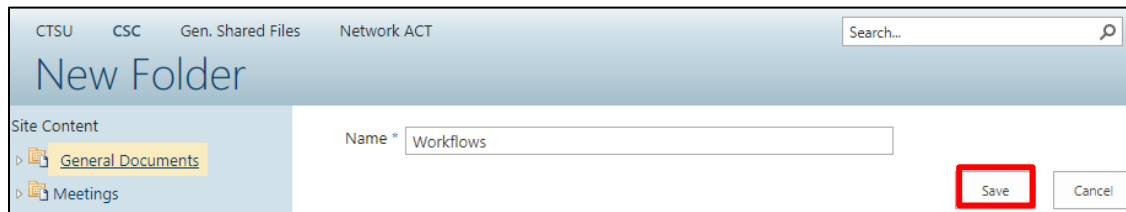
### 4.5.1 How to Create a New Folder within a Group

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).



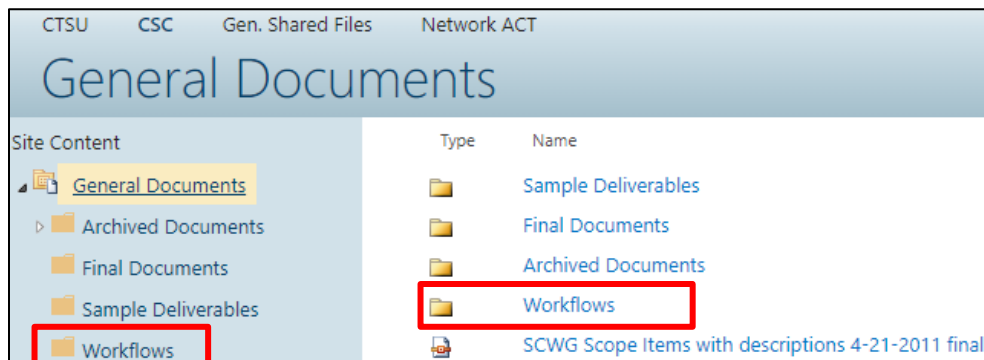
**Figure 21: Create New Folder within a Group**

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



**Figure 22: Naming New Folder**

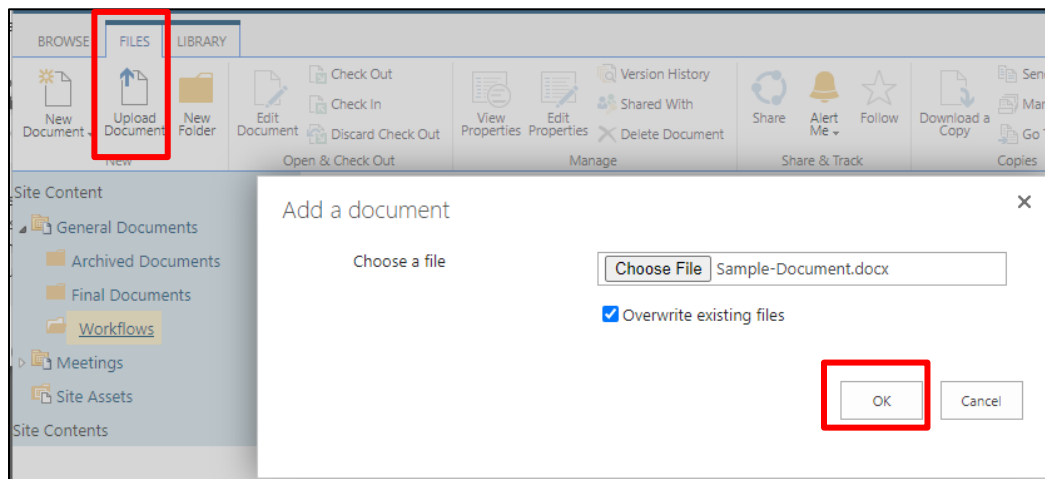
The folder will now appear (see Figure 23).



**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).



**Figure 24: Upload New Document into a Folder**

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

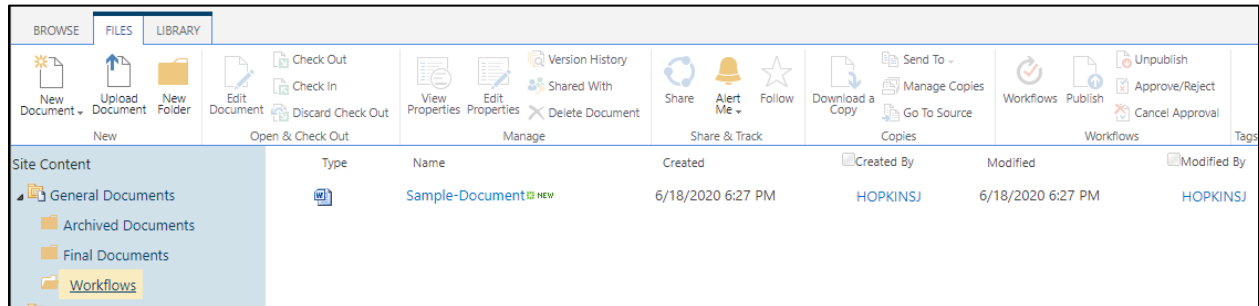


Figure 25: New Document within a Folder

## 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 and 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).

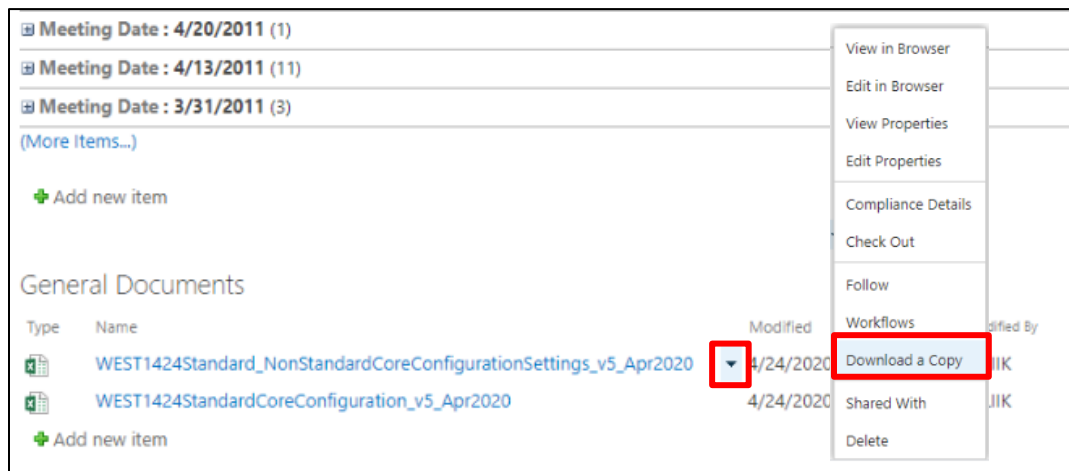


Figure 26: Downloading a Document

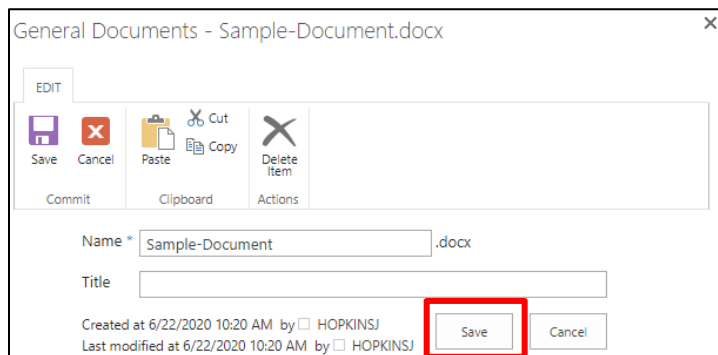
### 4.6.2 How to Change the Name of a Document

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



**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.



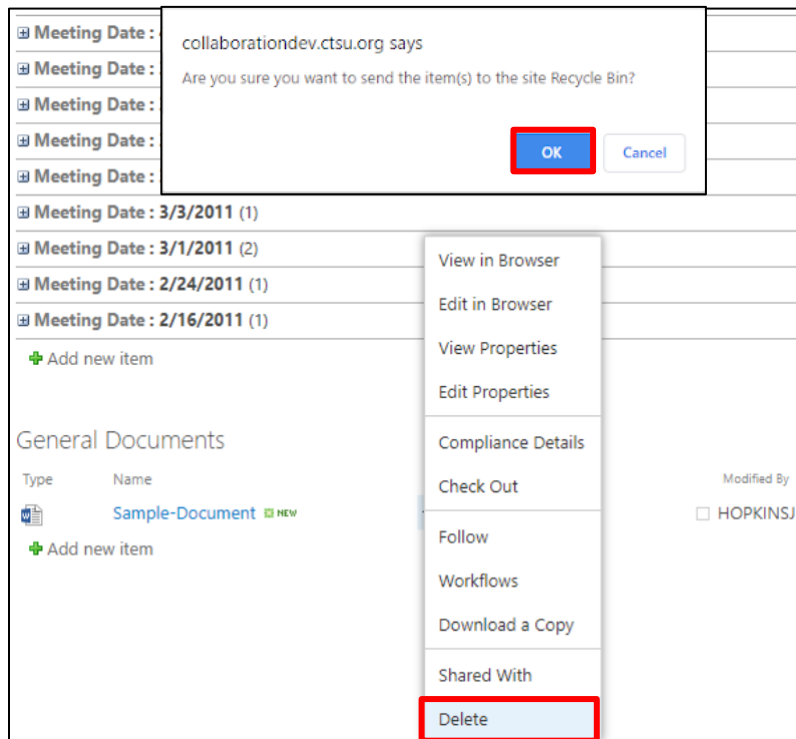


Figure 29: Deleting a Document

#### 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).

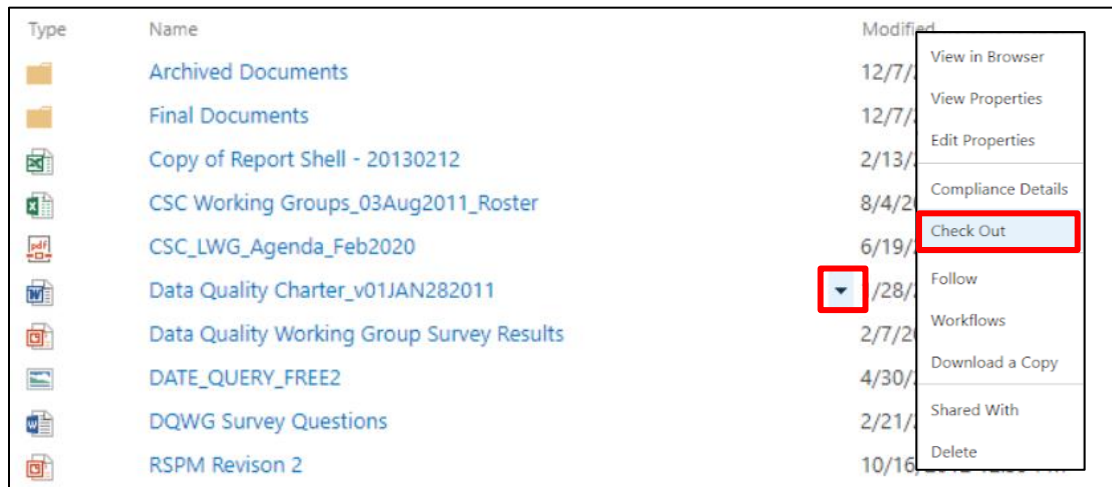


Figure 30: Checking Out a document

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

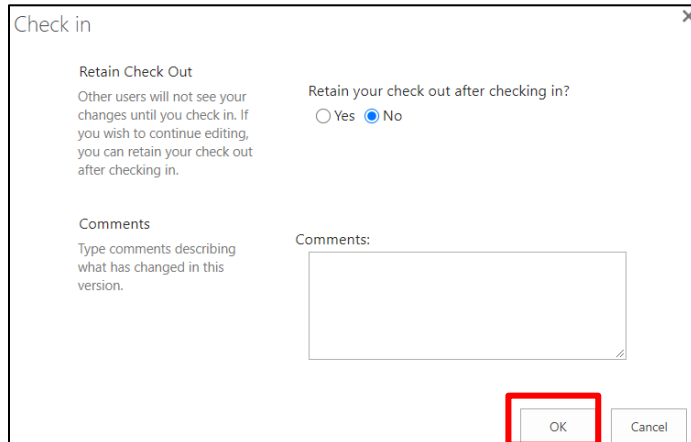


Figure 31: Checked Out Document Indicator

*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?**  
 Yes  No

**Comments**  
Type comments describing what has changed in this version.

Comments:

OK Cancel

**Figure 32: Check In Document; Comments Field**

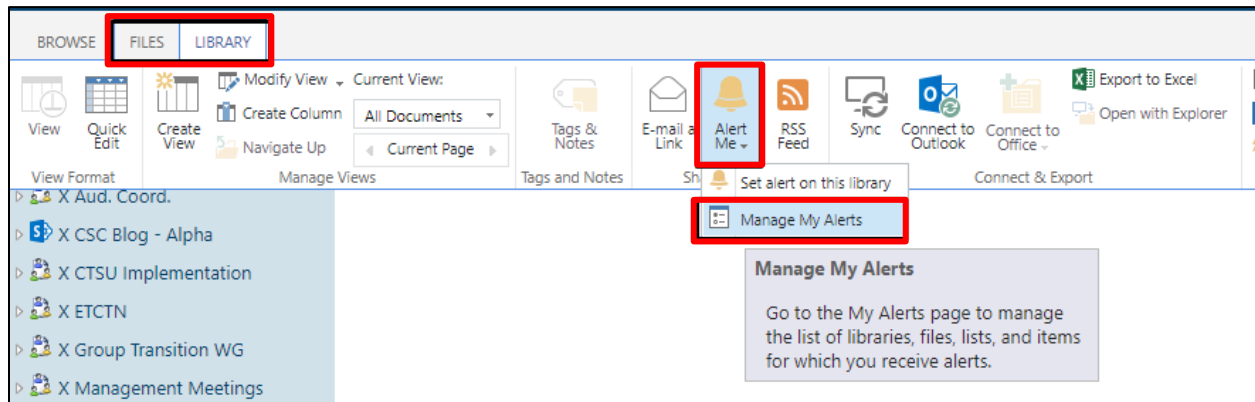
Note that if you go to check in a document but did not make any changes, you can always select *Discard Check Out* under the menu options. You will be asked to acknowledge that any changes will not be saved prior to completing the discard action.

## 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.

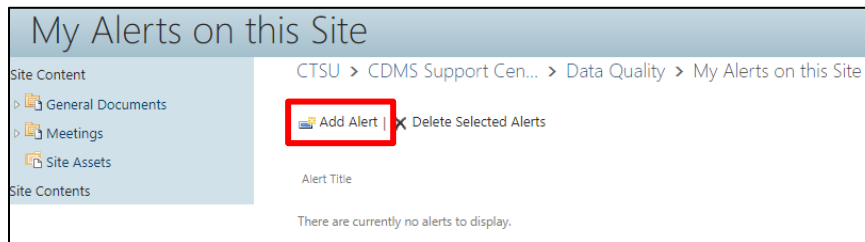
### 5.1 How to Set Up Alerts on Document Changes

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



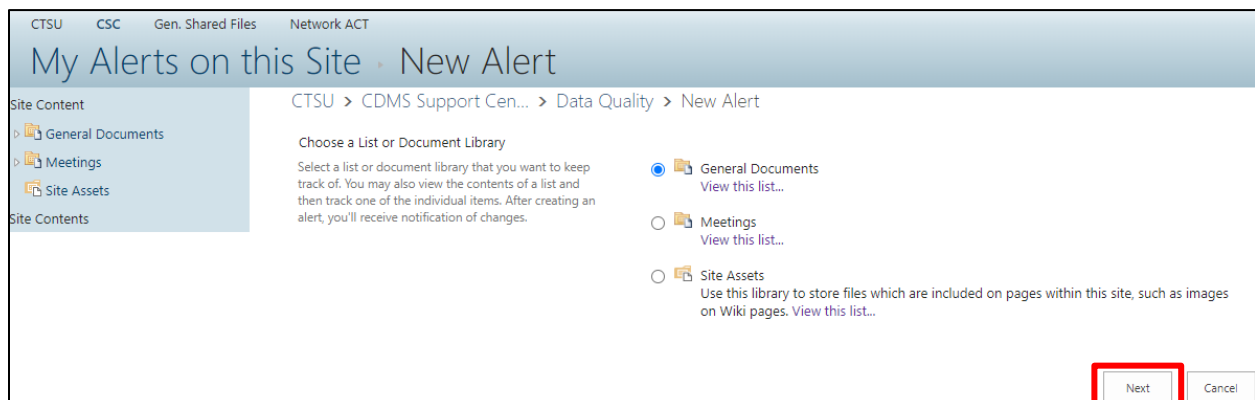
**Figure 33: Set Up New Alert**

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**

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).

**Figure 37: Alerts Screen**