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Survey Project Management Portal (SMaP): Manual for researchers for using the project management platform

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The four year project (2015-19) is a collaboration between the three leading European Research Infrastructures in the social sciences – the European Social Survey (ESS ERIC), the Survey of Health Ageing and Retirement in Europe (SHARE ERIC) and the Consortium of European Social Science Data Archives (CESSDA AS) – and organisations representing the Generations and Gender Programme (GGP), European Values Study (EVS) and the WageIndicator Survey.

Work focuses on three key areas: Addressing key challenges for cross-national data collection, breaking down barriers between social science infrastructures and embracing the future of the social sciences.

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### Glossary

#### Intranet
The SMaP intranet provides a private virtual network accessible only to participants in a survey project. It is conducive to supporting internal company processes as it constitutes an important focal point of internal communication and collaboration including workspace applications, search engines, user profiles, wikis, notification systems, etc. Individual permissions can be assigned for each user so that they only see what they are allowed to.

#### Navigation
A set of menus (sometimes so-called node tree) that contains hyperlinks to other parts of a site. The default navigation menus in SMaP are located in the top navigation bar and left navigation.

#### Space / Workspace
A collaboration workspace where you can share documents, tasks, events, wikis and more. A space can be open or closed, private or public and space administrators can manage members and applications that are available.

#### Activity
An activity is published on the Activity Stream and allows you to follow what other members of your space are sharing, such as links to documents or just moods.

#### Permission
Permission settings control actions of a user within the site and are set by the administrators.

#### Symlink
Symlink is a special file which contains a reference to a document or a folder. By using symlinks, you can easily access specific nodes (target) to which symlinks point. In Documents, a symlink has a small chain symbol next to its icon.
1. Introduction

The Survey Project Management Portal - SMaP is a concept of a customisable intranet portal, designed to support the management of cross-national survey projects. This concept has been developed based on the requirements of survey projects with regard to the life cycle, workflows and organisational structure as well as on the technical features provided by the open source software eXo Platform - Community Edition version 4.4. In other words, SMaP is a theoretical as well as functional concept applicable to the particular software (eXo Platform), which results in a tailored portal of a specific survey project.

Since no unique SMaP exists, it is not possible to provide a unique user guide. The present user manual covers the key features/functions of a sample portal with a low level of restrictions, i.e. option of customisation of few features is allowed for users. This also implies that layout images may differ from the SMaP you are using. Moreover, some features described here may not be available in your workflows. The source of the content and images is online eXo Platform Documentation Version 4.4. For more detailed explanation of features, please consult the eXo Platform User Guide.

This guide can be used by all portal members. It assumes that the user is using the defaults provided in the SMaP portal. Portal implementation steps and Administration Management features and settings are described in the Administrator’s Manual.

A series of reality-based examples and respective explanations will guide portal users in their project tasks. To make it easy for readers when approaching, this guide is organized in a sequence we assume researcher will accomplish their tasks, once they enter the project intranet portal for the first time:

- Getting started
- Your personal applications
- Searching on the portal
- Working with Spaces
- Communication channels
- Manage your Documents
- Calendar actions
- Manage workflows with Tasks

2. Getting started

According to SMaP concept, the actors of the survey project will be registered on the portal by the project or SMaP administration team. The user account information - user name and password - will be communicated individually via e-mail. The users will be asked to change their password upon their first login.

After signing in your user account successfully, you are redirected to the Intranet homepage, the starting point for exploring the portal content and tool applications. Intranet homepage gives an overview of all collaboration activities available in SMaP.
There are 3 main divisions in the Intranet homepage:

- **Navigations**
  - **Top navigation** contains menus that allow common actions, such as User Profile, On-site notifications, Search, and FAQs.
  - **Left navigation** allows you to quickly jump to applications, web pages shared by all users in the [PROJECT] list, and the workspaces in the "MY WORKSPACES" list. By default, the following applications are available: People (To display the whole list of the portal members), Wiki, Forums, Calendar, Tasks, and pages shared by all users.
  - The order of applications and pages in the PROJECT list may change in case some applications are not deployed, or some additional applications/pages are implemented.

- **Homepage**
  - Homepage is a classical static page providing relevant information on the project, links to relevant documents, etc.

- **Social gadgets**
  - You can quickly perform key actions through the following standard applications provided on the right hand side of the Intranet homepage:
    - Announcement: Relevant news about the project (updated by the administrator)
    - Calendar: Get an overview of calendar events. See Calendar application for more details.
    - Who’s Online?: See who is currently online
    - Support: Contact details for technical support

The order and the type of the applications/gadgets may change depending on their priority.
Browser settings

We generally recommend using Mozilla Firefox as internet browser while working with SMaP. There are some actions you can take for a better portal usage:

- If the page is not displayed correctly, please **Refresh** the browser page.
- In case the notifications setting of your browser is not defined, you will receive a pop-up message for **Show notifications**. Please click on Allow notifications to be able to get on-site notifications on the portal.

Recommendations for using Microsoft Office programs:

- Opening Microsoft office files requires additional user’s **Authentication** on the server. Usually, there is the possibility to remember the user account information to avoid repetitive request.
- When using default settings in Chrome browser, the files that are linked on myEVS web pages will be downloaded automatically.

If you use Google Chrome browser, under chrome://settings/downloads you can activate the setting **Ask** for where to save each file before downloading in order to save the file in an appropriate folder while downloading.
In the next step click in drop-down menu the downloaded file and Open the file or Show in folder.

- In Firefox you have the possibility to change the default actions for opening Microsoft office files. You can choose between these options:
  - Always ask
  - Save file
  - Open with Microsoft [Office] (Standard)

We recommend setting Standard file format in order to reduce the load of notifications during the workflows. These settings can be modified at any time.

3. Your personal applications

In top navigation the menu User Profile include personal applications that allow you to manage your profiles, email notification and to work with Wiki quickly.

3.1 Change your account settings

Before starting to collaborate on the portal you need to adapt the settings of your user account. In most cases, users may need to change their password after the first login. Moreover, you can edit profile information and change the language of the User Interface (UI).

3.1.1 Edit profile information

By clicking your display name you will be able to change your profile information by clicking on My Profile. You can quickly navigate to your personal pages: My Wiki, My Notifications or change account preferences or language of the portal interface.
3.1.2 Change UI language

To change the language of Use Interface, do as follows:

1. Click your display name on the top navigation bar, and then select **Change Language** from the drop-down menu.
2. In the Interface Language Setting form, you will see 23 languages that eXo Platform supports. Select your preferred language to display, e.g. English.
3. Click **Apply** to commit your changes.

![Interface Language Setting](image)

3.1.3 Change password

If you forget your password, you can request the system to send you a link to reset it. The link will be sent to your email. It helps if you forget the username too.

1. Click **Can't access your account?** link in the Login screen.
2. In the next screen, input your username or email, and then click **Send**.
3. Check your mailbox. Open the email **Password Reset** sent by the system.
4. Click the link in the email, then input your new password and click **Save**.

![Change Password](image)

If the password is saved successfully, a popup will notify you in seconds, and then you are redirected to the Login screen.

In case the link has expired already, you will see a notification with the request to "repeat the activation process". The link expires as soon as you successfully reset the password, or after 1 day by default.
3.2 My Wiki

My Wiki is your own wiki page where you can store works on drafts before being published on the public Wiki. Your wiki page is private by default. This means only you and your administrator can access this via the link (.../wiki/user/[username]).

1. From the drop-down menu of your display name, select My Wiki to be redirected to your own Wiki page.
2. Click the Public/Restricted status indicated at the page header to display the Permalink form.
3. If the page is public, click Restrict to restrict the access. The form will show that the page is changed into the restricted status and just the authorized users can view and edit it.
4. If the page is restricted, click Make Public to make it public. The form will show that the page is changed into the public status, and anyone can access, read and edit it.
3.3 My Notifications

The notification system of the portal allows for classification in:

- **Notification stream**: what pushes notification information (the left column)
- **Notification type**: how the notification is to be received, by email / on-site (the right column)
For each notification channel/stream you can change your personal notification settings as below:

1. Select **My Notifications** from the drop-down menu of your display name on the top navigation bar. You will be redirected to the **Notifications Settings** page.
2. Select notification options as desired. In particular:
   - **Notify me by email**: If you choose the **No** option, the functions concerning email notification will be hidden.
   - **Notify me on-site**: If you choose the **No** option, the functions concerning on-site notification will be hidden.
   - **Send me an email right away**: Indicates whether you want to receive email notifications instantly or not.
   - **Send me a digest email**: Specifies whether notifications of selected types are included in the digest emails (see option Daily or Weekly) or not (option Never).
   - **See on site**: Indicates whether you want to receive notifications on-site or not.
3. Click **Save** to save your new notification settings.
4. Or, click **Reset** at the bottom to reset to default values for all your notification settings.

Depending on the Notification stream, the content of the notification may vary.

### 4. Searching in the portal

Search for any types, such as people, workspaces, files, events, tasks, activities by clicking the icon 🕵️‍♂️🔍

1. Enter your search term into the search box. This search displays quick results in the drop-down menu. These results are grouped by their types: Documents, People, Events, Tasks, etc.

Or, hit the Enter key, or click the icon 🕵️‍♂️🔍, or click **See All Search Results** to view all results in the search main panel.

2. Select your desired result from the drop-down or from the main panel menu to directly access it.
In the search main panel, you can restrict the search results by **Filter** or **Sort** function.

The **Filter By** panel is displayed on the left side, allowing you to control the search range by sites and content types. By selecting the **Sort By** drop-down menu, you can narrow your search results by their Relevance, Date or Title.

- To preview the selected document in *Document Viewer*, you simply need to click on the **document's icon**.
- To download the selected document, you need to preview it with the *Document Viewer* then click on the **Download** button.
- To preview the selected document in Documents Application, you simply need to click on the **document's link** or in the button **Open in Documents** after previewing it in *Document Viewer*.
5. Working with Spaces

The Workspace (also referred to as a space) concept is based on the importance of team working, allowing you to collaborate with specific people. Using spaces is flexible. According to project requirements, it can be applied for teams, themes, communities, or any kind of informal groups.

After logging into the Intranet successfully, you will see a list of your spaces under MY WORKSPACES on the left pane of the page. There are three main components:

1. The **Search Spaces** box allows you to quickly search for a space from your workspaces list.
2. The list of workspaces (name and icon) shows only the spaces which you are a member of. The sequence of listed workspaces is determined by the last spaces browsed by the user.
3. **MY WORKSPACES** menu allows you to access the Spaces page which displays all the workspaces in the portal. Here, you can quickly search for your desired workspace.

**NOTE:** If there are more than 10 spaces in the list, the See [X] More Spaces link appears at the list bottom. Click this link to show more spaces.

5.1 Workspace Membership

After clicking on **MY WORKSPACES** link, you will be directed to the Space application page.
The Space navigation includes:

- **All Spaces** tab which displays all your spaces and ones whose Visibility I set to “Visible”.
- **My Space** tab shows all visible and hidden workspaces where you are a member of in alphabetic order.

To access a specific workspace, just click the workspace name.

**NOTE:** By default the button **+Add New Space** appears on the top bar. Please consult the project administration before you add a new space!

You can quickly find your desired workspace from the list by

- Typing its name/description into the **Search Spaces box** (see section 1 in the image above)
- Clicking on the MY WORKSPACES link and typing the search term in the search box on the top right corner
- Clicking on the character button that corresponds to the workspace name

When you try to access a workspace page (by clicking on its name or via its URL) while you are not its member yet, you will receive the following instruction (e.g. workspace **Communication**):

**NOTE:** The portal administrator and the project manager/administrator have the highest levels of permission and therefore can see and access all spaces for administration purposes.

### 5.2 Workspace applications

A workspace is a virtual area for collaboration with your team members. It provides useful applications combining project and data management features, according to the project tasks of the specific team. Depending on your activities you may be part of one or several workspaces.

By default, the space is featured with some default applications pages on the space navigation bar. Simply click each application to use its functions.
NOTE: Once you enter a Workspace, the Activity Stream page will be displayed by default. When switching between workspaces, however, will lead you to the application page in which you were currently active.

- **Activity Stream**
  From the activity stream tab you can see recent actions and activities that happened within a specific workspace.

- **Tasks**
  In contrast to the common Tasks application, here you have a reduced overview of workflow projects, specific to your team. You can easily access and manage your workspace tasks.

- **Documents**
  The documents tab provides access to the folders and documents specific to the workspace/team.

- **Wiki**
  Wiki is a tool that can be used as a knowledge center for team members. You can create and edit pages, manage drafts, relate to other pages, and attach files. An additional feature is the automatic storage of meeting notes produced in chat meetings.

- **Agenda**
  Similar to Tasks, Agenda is a space calendar providing a filtered overview of events, i.e. only those related to your workspace. It allows space members to create/edit the same events/tasks in the space calendar. See Calendar for more details.

- **Forums**
  The Forums application is useful for group discussions and sharing contents allowing participants with common interests to exchange their opinions on a subject.

- **Members**
  This gives an overview of memberships in your workspace. When accessing the Members application of the space, you will see a list of space members. If there are too many members, the Show More bar will appear at the page bottom.

*NOTE: If you are using the software version 5.0 or higher, the Space Chat icon will appear in the space navigation bar*
6. Communication channels

There are several ways of communicating thoughts, questions, and results within the portal. Activity Stream, Chat and Forum are the applications you may use most to collaborate in teams, share information and discuss issues. All three applications can be utilised for communication within one group/space (filtered view) or as a common application (global view) where all the communication streams are aggregated in one place.

Depending on the role policy and workflows of your project, the global Activity Stream or/and Forums application may be disabled by the admin.

6.1 Activity Stream

The easiest and quickest way to share information within and between teams is by using Activity Stream. Prerequisite is to enable 3.3 My Notifications. As the name suggests, in Activity Stream are documented all the recent activities made by you or team fellows or other users that are somehow related to you or your tasks. There are two ways of using Activity Stream:

- Users **actively** post messages, upload files and comment on each activity
- Documentation of activities is done **automatically**, e.g. a file has been uploaded, a calendar event has been added, a forum topic has been created, etc.

6.1.1 Global Activity Stream

Global Activity Stream is an Intranet homepage application that aggregates activities from workspaces, so you can keep track of their activities without visiting every workspace. You can filter what kind of activities you want to see on the homepage: All Activities, My Spaces, Connections, and My Activities.

**NOTE:** In standard implementation SMaP is not featured with the social networking component and therefore, the global Activity Stream, Connections and My Activities applications are not available.

6.1.2 Space Activity Stream

After entering your workspace, you will be directed to the Activity Stream of that space. The purpose of the Activity Stream is to get informed you about the recent activities but also share with other space members what you are working on or ask for their help or ideas by posting a status update message.

**NOTE:** In Activity Stream, the order of activities is based on the last date when you or other workspace members create a publication action, or post a new comment. This means the last publication or comment will be auto-updated and pushed up to the top of the Activity Stream so that you will not miss any recent activities.

- **Posting a status update**

On the Activity Stream, you can enter a message in the Activity Composer through one of these three tabs:

- Activity: allows you to post a simple message.
- File: allows you to post a message with a file attached.
- Link: allows you to post a message with a link attached.

A formatting toolbar appears once you click inside the activity composer. It lets you change the formatting of your message and preview how it will looks once posted.

The formatting tools are: Bold, Italics, and Clear formatting, Numbered and bulleted list, add Quotes, Hyperlink, and Image.

Once you have posted your activity it will appear on the top of the stream.

*NOTE: In later software versions the “Activity” button is called “Messages”.*

➤ **Mentioning someone**

Mentioning someone is possible while in the activity post, activities comments and also document comments. To mention someone, do as follows:

- Type the "@" symbol into the activity/comment composer, then type the person name you want to mention. A suggestion list that contains matching characters will appear.
  - *NOTE: Only one person can be selected at one time.*
- Go through the suggestion list with the "Up" and "Down" arrow keys or by moving your cursor over it, then click or hit the Enter key to validate your selected person.
  - *You can click [x] in the label to dismiss it.*

➤ **Sharing a link**

You can share media links, such as web articles, slides, videos, websites and more in your status.

- Click on the *Link* tab
- Insert the link into the *https://* input field
- Click *Attach* / to remove the link click [x].
- Add text / description in the Activity Composer
- Click *Post* to share your status with the link.
Sharing a file

A. From workspace Document repository:
   - Click on File tab in the Status composer to open the Select File form
   - Browse a file from the group (workspace) drive
   - Select which drive you want to browse from the drop-down list displayed at the top. You can select between: "Personal drives", "Group drives" or "General drives".

By default "Group Drives" is selected.
   - Select the folder and file
   - Validate the selection by clicking on Select, or double-click on the file to select it directly.

B. From your local device:
   - Click on the icon
   - A popup window will appear to let you select a file from your computer
   - Validate the selection by clicking on Select.

The newly uploaded file will be automatically stored in the workspace Documents and the link will be created in the Activity Stream post.

Commenting on activities

This action allows you to get ideas, answers, and any additional information when your collaborators respond to your status updates. Besides, you can comment by yourself about any activities as follows:

   - Click the icon on the right hand side of the activity you want to comment. A formatting toolbar appears once you click in the comment composer.
   - Enter your comment into the Comment box and press the Comment button. Your comment will be displayed right after the activity.

NOTE: When there are more than two comments on an activity, the two latest comments will be displayed. You can click View all [the total number of comments] comments to view more comments.
Deleting activities/comments

You are allowed to delete the activities/comments that you created, and those in the workspace where you are the manager.

- However, your cursor over the activity you want to delete, and then click [X] that appears.

6.1.3. Notifications

You will receive notification of a workspace activity, when a member of your space did the following actions:

- **New post**: You will receive the **New post in your space** notification when someone posts on the activity streams of your spaces.
- **Mention**: You will receive the **New mention of you** notification when someone mentions (@) you in the Activity Stream.
- **Comment**: You will receive the **New comment on your activity** notification when someone comments on your activity or any activity where you have already commented or liked.

On-site notifications

By default, you will receive on-site notifications every time your colleagues have produced activity within the space.

- Click on the notification (bell) icon in the top navigation bar
- Click on the notification stream and you will be taken to the activity with all comments expanded.

E-mail notifications

When receiving notifications related to an activity on any content via E-mail, the message contains shortcut actions to interact with the activity or the content:

**View the full discussion**: Clicking on that button redirects you to the activity that invoked the email sending. All comments on this particular activity will be shown.

**Reply**: You will be taken to the activity with the comment box opened that is ready for your reply.

**Open**: Clicking on that button opens the content that generated this activity in its context. This button is available for activities that are related to a content change.

For Status updates with file attachment, **Open** button opens the file in *Documents* application.
6.2 Discussing in Chat

Chat is an instant messaging application that allows users to get informed and take action quickly, enabling the real-time collaboration among teams and individuals.

The chat application can be utilized in two different ways:

- Global chat application in the top navigation menu
- Space chat (or Quick-chat)

The most intuitive way to use Chat is to open its browser window through the top menu by clicking on the icon and then Open Chat.

Your selected status is shown next to your name. Available is set by default. Below you will find the description for each status.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>You are online and available to talk or get instant messages from another. When you use eSio Chat for the first time, your status is available by default.</td>
</tr>
<tr>
<td>Do not disturb</td>
<td>You are online but don't want to be disturbed. Another can still send instant messages and call you.</td>
</tr>
<tr>
<td>Away</td>
<td>You are online, and another can talk to you, but you will not reply for now.</td>
</tr>
<tr>
<td>Invisible</td>
<td>You appear to be offline, but another can send messages to you.</td>
</tr>
</tbody>
</table>

6.2.1 Global vs. space Chat

Quick chat with team members within a workspace is possible through the space chat. The mini chat window can be opened by clicking on chat button next to the workspace picture on the top left navigation. You can immediately compose a new message or start a discussion with the members of your workspace.

For more chat functions click on the arrow icon Open Chat, and the chat application will open in another tab.

By using the appropriate icons, you can also minimize the quick chat window or close it.
6.2.2 Sending / Receiving an instant message

When you receive instant messages from other users, the desktop notification popup will alert you to new/unread messages.

If you receive an incoming message in real-time while you are online, clicking on the pop-up message redirects you to the corresponding conversation in the Chat application.

The number of messages received appears next to the chat icon. By clicking on it, a list menu showing the last received message appears.

NOTE: Desktop notifications are sent only if you gave the permission to receive notifications through the web browser. You are requested to give your permission the first time you access to a chat application.

- **Sending an instant message**
  1. Open chat application by clicking on the Chat icon in top navigation and then click on Open Chat.
  2. Choose the contact or (work)space from your lists (Favourites/People/Discussions/Spaces) to whom you want to send a message.
  3. Click on the contact name. The chat conversation is opened in the right pane.
  4. Type your message into the input box, then hit the Enter key.
  5. Also, you can make your messages livelier by adding emoticons.

The selected emoticon will be displayed as animated in the chat zone.

NOTE: If the user you want to contact is not in you contact list, you can create a new Discussion (see Start a group chat section below) and add him/her to the discussion room.
Receiving an instant message

If someone sends messages to you, you will see the number of newly received ones

- on the Chat menu (to check them, simply hover the cursor over the Chat icon)
- in the Mini-chat (when you click on received message, the small chat window opens to see the full content)
- in the chat window (click the contact so that you see the icon of unread messages).

Hover the cursor over one chat text to show the actions you can perform.

- **Save notes**: Click Save notes to save your discussion as a note. There are 2 options: Send meeting notes and Save as wiki (see "Start a meeting" section below for more details).
- **Edit**: Click Edit and make changes in the Edit form. After clicking Save, your new content will be updated in the chat zone with a on the right.
- **Delete**: Click Delete to remove your sent message from the thread. An information message is displayed in place of the deleted message with a pen icon on the right.
- **Quote**: Click Quote to append one message in the input box. On the chat zone, the quoted message will look as follows:

![Chat window with quote](image)

**NOTE:** *Edit* and *Delete* actions are only shown for your own chat texts. For chat text of others, you only can **Save notes** and **Quote**.

6.2.3 Organise contacts

When your contacts list becomes too long, it will be difficult to control everything. Here are some tips commonly used to keep your contacts list well-organized and easy to find.

**Hiding/Showing contacts list**

Currently, your discussions can be arranged into 4 categories in the left pane: Favorites, People, Discussion, and Spaces. To find what you want quickly, you should show lists one by one by clicking . Hide unnecessary lists by clicking the same icon.

Under the People pane you will see all your contacts (private contacts and members of your space) that are currently online. Also, in the People pane, you can click to show/hide offline users.

By clicking on the next icon , you are able to list all your previous contacts.
Adding to favourites

To find quickly a contact you often chat with, hover over the user or the space and click ★ to save as a favorite. The contact will be moved to the Favorites pane, at the top of your chat lists.

To remove one contact or space from your favorites, hover over one in the Favorites list and select ★.

Using search bar

If you want to find one contact, type some letters following @ in the search bar. The contacts will be filtered accordingly.

Enter the beginning of multiple words following @, and the predictive search will find the best match.

No matter whether you remember the beginning of a group name, the first name or the last name of someone, the search will always return the best match.
6.2.4 Creating / Editing a group chat

➢ *Start a group chat*

By creating a group chat, you can share work, knowledge and plans with your colleagues more efficiently. In Chat, the "group chat" denotes discussion among workspace/team members.

Your spaces (that you are owner or member of) are auto-listed in the *Spaces pane*.

To create a new chat room in the left *Discussion pane*, select “+” to create a new chat room.

Enter names to invite another member to the room.

You can also remove a chosen username by clicking on “X”.

Click *Save* to finish. The room is created and a message is displayed indicating the members added.
Options in chat room

Each group chat room, be it in the Discussions or in the Spaces section, has some extra features that you can set as preferences. Therefore, please:

1. Select one chat room among those you created in the left pane.
2. Select the top right corner to open the scroll list of choices (see the image under the section "Starting a meeting").
   - Start / Stop meeting
   - Add to / Remove from Favorites
   - Notifications
   - List of participants

Editing a Discussion chat room

For the chat room that you have created in the Discussion pane, you have the right to change its name and add/remove members as follows:

1. Select one chat room among those you created in the left pane.
2. Select the top right corner to open the scroll list of choices.
3. Select Edit from the list of choices.

The list that appears after clicking on Edit contains the list of actions that you can make in the chat room. An edit chat room form appears in which you can perform these actions:
   - Rename the chat room.
   - Add more members (Same way as in creating a new chat room).
   - Remove members by clicking the corresponding “X” symbol.

NOTE: Only the chat room creator is able to edit the Discussion chat room.

6.2.5 Collaborative features

Start a meeting

1. Select the desired chat room in the Discussion or Space pane.
2. Click on the in the top header in the chat window to show your actions for this chat room.
3. Click Start Meeting.
4. The information message will be shown in the chat zone.
To finish the meeting and create the protocol / meeting notes repeat step 2. Then click on **Stop Meeting**.

The information message will be shown in the chat zone.

If you select **Send meeting notes**, the notes will be sent to your email. One information message is shown in the chat zone.

*NOTE: An automatic post on the Activity Stream will inform workspace members about the available meeting notes.*
If you select **Save as wiki**, a wiki page link is displayed.

By clicking the wiki page link, you will be redirected to the Wiki page in your workspace containing the notes displayed as a sub-page.

For space and discussion rooms, a collapsible panel contains the list of the total number of chat room members. People avatars are sorted by presence, then in alphabetic order. The order used for presence is: **Available, Away, Do not disturb, Offline.**
Offline users are not displayed by default. To display them, you need to click on the icon **Quick actions**.

During a conversation, some collaborative actions are available on the icon 👇 next to the message input box.
Adding an event

1. Select Add Event from the list of collaborative actions.
2. Fill in the form fields, including the event title, dates, time, and location.
3. Click Post. The newly created event will be displayed in the discussion area.
   - If you choose the wrong dates, for example, when the end date “To” precedes the start date “From”, an error message is displayed indicating that the dates are erroneous.
   - If you do not fill in all the needed fields, an error message appears prompting you to fill in the whole form.

NOTE: In Discussion and Private chat rooms, the event will be created in the personal calendar of every member of the room. In the Space room, the event will be created in the Agenda of the corresponding workspace.

Assigning a task

1. Select Assign Task from the list of collaborative actions.
2. Fill in the form fields including the task title, assignee, and due date.
3. Click Post. The newly created task will be displayed in the discussion area.

BEWARE: Task assignment within a discussion “meeting” will deactivate the creation of meeting notes.
- **Sharing a link**
  1. Select **Share Link** from the list of collaborative actions.
  2. **Enter** a valid URL, then click **Share**.
  3. The shared link is displayed in the discussion area with prefixed icon.

- **Uploading a file**
  1. Select **Upload File** from the list of collaborative actions.
  2. **Drag and drop** the file into the DROP YOUR FILE HERE area, or click **Select Manually** to select a file from your computer.
  3. The uploaded file is displayed in the discussion area.

*NOTE: The file will be stored in Documents of that particular group/workspace. The user who uploaded the file will have the permission to remove it from Documents.*

- **Asking a question**
  1. Select **Ask a Question** from the list of collaborative actions.
  2. **Enter your question** into the field.
  3. Click **Ask** to submit your question. The question is displayed in the discussion area.
➢ *Raising hand*

1. Select **Raise Hand** from the list of collaborative actions.

2. **Enter your idea** in the text field.

3. **Click** **Raise your hand**.

4. Your idea is displayed in the discussion area prefixed with **hand ICON**.

![Raising hand example]

6.2.6. **Chat notifications**

➢ **Global Notification Settings**

You can enable or disable desktop notifications through the Preferences screen by clicking on the icon in the top right corner.

![Preferences screen]

You can enable/disable a notification channel by changing the position of the toggle on/off. By default, all the notification channels are enabled.

A **Close** button allows you to dismiss the Preferences screen. The chat application displays the previously displayed room’s conversation.

On the Preferences screen it is also possible to enable or disable notifications for **Do Not Disturb** chat status. By default, it is set to off. If you enable notifications for Do Not Disturb status, this means that whatever your chat status is, you will receive notifications.

*NOTE: Settings will be immediately saved and applied.*
➢ **Notification Settings for each chat room**

In addition to the preferences that could be set for global chat notifications, it is also possible to parameter notifications for each room. For that purpose, follow these steps:

1. Select the room for which you want to parameter its notifications. You can select either a one to one chat room or a group chat room.
2. Click on the icon to display actions that you can do in that room.
3. Select **Notifications** from the list.

A screen appears enabling you to set the chat room notifications settings:

- **Normal**: When you want to receive notifications for the chat room.
- **Silence**: When you don't want to receive notifications for the chat room.
- **Alert on**: When you want to receive notifications for the chat room if another user sends a message containing a keyword.

### 6.3 Discussing in Forum

The *Forums* application is designed for group discussions and contents in which participants with common interests can exchange their opinions on a subject.

Depending on the role of the user (user, moderator or administrator), the user interface will indicate which features are available.

The **User bar** is the same for all users.

As a moderator you have the **Action bar** with a sub-set of certain capabilities, whereas a regular user the can see only basic questions. The **More Actions** button is shown when you are the creator of the topic.
6.3.1 Start a topic

To create a new topic in Forum, follow these steps:

1. Go into the forum where you want to start a new topic.
2. Click **Start Topic**
3. Enter the topic title and its content. Click **Attach files** to attach files to your message. The **Attach File form** is displayed.
4. Click **Preview** to see the topic before submitting, or click **Submit** to complete your topic.

**NOTE:** The maximum size for the attachment is 20Mb. Click the delete icon next to the attachment if you want to remove it.

Going to the **Options** tab, you can select status, state, type of the topic and more.

In the **Permissions** tab you can allow specific users only to view and reply on your topic. Click the icon to select users. By default, all users can view and reply on a topic.

**NOTE:** When a topic is created, an activity containing the topic title and content, the number of replies and average rating is also created on the Activity Stream. Replies, rating, information about the added/closed/removed poll, and information about the edited/locked/unlocked/closed topic are added to the activity as comments. When a comment is added to the activity from the Activity Stream, it will be updated to the Forums application as a reply of the topic.

To edit a topic:

1. Open your desired topic and click **More Actions** on the Action bar. For regular users this button is shown only when they are the creator of the topic.
2. Click **Edit** from the drop-down menu to open the **Edit Topic** form.
3. Make changes to your desires.
4. Click **Submit** to finish.

To post a reply, select the topic you want to reply to. You can reply to any topic as long as it is not closed and restricted.
You can post a reply to a topic with the rich text editor:

1. Click **Post Reply** on the top or bottom of the topic.
2. Enter your message in the text box. You can attach files to the topic by clicking **Attach Files**.
3. Optionally, click **Preview** to view your reply before submitting it.
4. Click **Submit** to finish.

You can post a quick reply with plain texts:

1. Scroll down to the bottom of the topic to see the **Quick Reply** box.
2. Enter your message. Optionally, click **Preview** to view your reply before submitting it.
3. Click **Quick Reply** to submit your message.

You can include a quote from the previous message in your reply to a specific post. This may substantially increase the readability of the discussion topics when it is used correctly.

1. Click **Quote** under the post you want to quote. This will bring up the "Quote" form, with the previous message already quoted in the text box.
2. **Enter** your message. Edit the quotation if necessary. To add a block quotation, simply click the icon ["] from the editor toolbar.
3. Click **Submit** to finish.

You can send a private reply in a topic, which only allows the responded user to view the message content.

1. Click **Private** under the post to open the **Private Post** form.
2. Enter your message and send it as described in the posting a reply with rich text editor section.

To delete a post, simply click under **Delete** your post that you want to delete, then click **OK** in the confirmation message.

### 6.3.2 More actions

- **Rating a topic**

The Forums application provides an intuitive rating experience through a five-star scale.

1. Go to the topic you want to vote.
2. Click the **Rate** button on the Action bar. The **Rate This Topic** form will appear.
3. Rate the topic by **clicking the star**. The number of selected stars will be changed from grey into yellow.
4. Click **Close** to quit the form.

*NOTE: Each user can only vote for a topic once. The function is disabled in closed topics and with banned users.*
Tagging a topic

Tags are keywords which are used as labels to describe or categorize the topic content. One topic may have several tag names. Using tags allows you to categorize topics based on the actual content. Even, it can be a better way to find a specific topic than a full-text search.

1. Click the Tag button on the Action bar. An input text box will pop up.
2. Enter a tag name or multiple tags separated by a space, or select existing tags in the suggestion list that appears when typing.
3. Press Enter or click Add Tag. Tags which are assigned to the topic appear as below.

Untagging a topic: Simply click the "X" icon next to that tag.

Adding a bookmark

In the Forums application, the Bookmark function is to collect links to a category, forum or topic you have visited, so that you can return to that category, forum or topic directly.

Bookmarks can be created and managed individually through the following actions:

1. Go into the object (category, forum or topic) you want to bookmark.
2. Click the Bookmarks button on the Action bar; Or, right-click the object title and select Bookmarks from the drop-down menu. The bookmarked link will be added to your bookmarks list.

To view a bookmark, click the Bookmarks button on your User bar. This will bring up the My Bookmarks form, with the list of your bookmarked links. To view a bookmark, click your desired bookmark title from the list.

Simply click the icon corresponding to the link that you want to delete. The selected bookmarks will be removed from the bookmarks list.

Creating a Poll

Each topic may have a poll question with pre-defined options for users to select. As a regular user, you can only add a poll question to your own topic. Moderator can add the poll to any topics.

1. Go to the topic you want to add a poll.
2. Click More Actions on the Action bar then select Add Poll from the drop-down menu.
3. Enter the poll question and options.
Details:

1. **Poll Question**: Question raised for polling that is required and must be less than 100 characters.

2. **Poll Options**: Options which allow users to select as their answers. Click the icon to remove a poll option. And, click "+" to add a poll option.

3. **Close Poll**: Period after which the poll is closed.

4. **Users may change their votes**: Allows users to change their votes or not.

5. **Allow Multiple Choices**: Allows users to vote for multiple options or not.

Click **Submit Poll** to complete. The topic that contains the poll is marked with the icon in the topics list.

To perform further actions on this poll, simply left-click **More Actions** on the Poll panel to open the drop-down menu. Here, you can edit, close/reopen or remove the poll by clicking the relevant button.
6.3.3 Send private message

Private messages will not be moderated and are viewable only for recipients. You can do the following actions on private messages:

- Click the **username** or avatar of the user you want to send message, then select **Send Private Message** from the drop-down menu. The **Private Messages** form will appear.
- When you have received a private message, there will be a notification on your User bar.
- Click **Private Messages** to open the respective form.

![Private Messages form](image)

- **Inbox**: Place to view or delete received messages.
  - Click the **message title** to see its content.
  - Click **back arrow** to reply the message. You will be redirected to the **Compose New Message** tab.
  - Enter the message content into the **Message** field, then click **Send**.

- **Sent Messages**: View or delete your sent messages.

- **Compose New Message**: Where to compose new messages.

You can send private message to other users (outside your workspace) as well. To do this, enter the username of the other recipients, or, click the icons next to **Send to** field to select one or more recipients (if you want to send the message to many users at the same time).
6.3.4 Notifications

Always when in a space Forum a topic or a poll has been created or edited, it will be documented on the activity stream. Activities trigger a notification (on-site or/and E-mail notification, depending on your notification settings).

6.4 Comment on activities, files and tasks

Comment function in SMaP is a popular feature for communication. It exists for different features and if it is used in a structured way, it can ease the collaboration and support the workflows. Commenting on a workspace activity is possible:

1. via the e-mail notification by clicking on the button Reply. It redirects you to the activity where you can directly comment it.
2. in the application itself.

6.4.1 Commenting on a document

To use the function comment on a document:

1. Open the document to which you want to add your comment.
2. Click on the Action bar to open the Comment form.
3. Add your comment, and then click Save to commit.

A formatting toolbar appears once you click in the comment composer. It allows you to change the formatting of your message, attaching images and links and preview how it will look once posted (like what we have for the activity stream composer).

The comments are shown at the bottom of the document. They are displayed exactly like in the activity stream.

- Click the Show comments link to view comments.

- Edit your comment by clicking or delete it by clicking the icon .

For MS Office files and viewable media types, the Document Viewer provides maximized reading estate and comment function, among others. You will see the Comment area on the right side when you open the viewer. If it is hidden, you can bring it back by clicking the rightmost arrow icon.
Note: You can mention people in your comment by first typing "@" symbol then selecting the person name you want to mention.

You can comment on a document via the Activity Stream post with attached file by opening the Document Viewer or Preview. The Comment pane, where you can comment on or like a post, is only available when you view a document in the Activity Stream.

6.4.2 Commenting on activities

This action allows you to get ideas, answers, and any additional information when your collaborators respond to your status updates. Besides, you can comment by yourself about any activities as follows:

1. Click on the activity you want to comment.
2. Enter your comment into the Comment box and press the Comment button. Your comment will be displayed right below the activity.
6.4.3 Comment in Tasks

You are able to communicate and share your information on a specific task by using the comment function. The Comments tab allows people to discuss about the task, while the Changes tab shows all changes history of the task.
7. Manage your Documents

Documents application is the place in your Workspace where you can upload, submit, organize and exchange files within and between the workspaces you are a member of.

7.1 Documents interface

The interface consists of the

1. **Address bar** on the top
2. **Sidebar** on the left (the document navigation tree)
3. **Action bar**

You can browse your content by entering the path of the relevant content directly into the address bar. You can come back to the previous content by clicking the back arrow.

You can set up your **browsing preferences** by clicking the icon on the right side of the Action bar. The Preferences window will appear. Configure the preferences to your desires and click **Save** to set them; or click **Close** to quit without submitting changes.

You can organize your content effectively based on the existing filters on the sidebar in the main view. Thus, to filter your content, you need to enable the sidebar first.
Next, find out your content quickly by selecting:

- **Owned** by me to show your own ones.
- **Favorites** to show ones added to favorites.
- **Hidden** to show hidden ones.
- **Filter By Type** to show ones by various types, including: Content, Document, Image, Music and Video.

In the sidebar additionally to site explorer you have the possibility to do the following actions with files: tag, search, viewing relations between documents or copy to clipboard.
7.1.1. Folders

Files in Documents application are organized in folders. Folders can contain subfolders and files (documents, datasets etc.). Folders can be connected to folders in other workspaces by adding a Symlink to the respective folder 📛. Connected folders contain the same content and all actions on this content will be synchronized in both folders.

Before doing any actions on your content, it is recommended that you clarify the following points:

1. In the left navigation / sidebar (and icon view), you can right-click the content that shows a drop-down menu.
2. If the List view, you cannot right-click the content. Instead, click anywhere under a specific area of the content (marked with the ticked checkbox). You will see a list of actions on the Action bar that are similar to those from the Right-click menu.
3. When the document is open, in the Document Viewer there are additional functions to the document.

NOTE: Depending on the display width of your device, some actions (for example, Download, Permissions or Versions) may be grouped in the More drop-down menu.

Creating a folder

To make your content management neat and easy to find, you should create appropriate folders to store them.

- Go to the location that you want to create a folder.
- Select New Folder to open the New Folder form.

If you create a new folder in a drive which allows creating more than one folder type, you will see the Use a custom type of folder checkbox. Tick this checkbox, and then select the folder type from the drop-down menu. You can choose between Content Folder and Document Folder.

NOTE: By default, if you do not select the Use a custom type of folder checkbox, a Document Folder type will be created.

- Enter a folder name and click Create Folder to finish.

NOTE: The name of a folder may be the same as that of the existing ones. In this case, an index will be added to your newly created folder that can be seen on the address bar. Child (Sub) folders will have the same folder type as that of their parent folders.
7.1.2 Permissions

Folders differ in their permission settings. A user can have only reading rights in one folder or have full access. There are three access rights for folders as well as its content (files within folders):

- **Read**: User has the permission to only access/read a folder and its content. Uploading a new file or creating a new folder is not allowed.
- **Modify**: User can modify the content of a folder, upload files, create new folders, and edit files.
- **Remove**: User can remove / delete the folder and its content.

General rule: User, who uploaded the file is the owner and has the right to read, modify and remove the file, irrespective of their folder permissions.

This function allows you to manage permissions on content/files.

- Select content, and then click to open the Permission Management form.

- **Adding permissions**
  - Select a user or a membership or everyone whom you want to assign permissions by clicking the user, group or membership type icon.
  - Select right(s) you want to grants by ticking the corresponding checkboxes.
  - Click Save to accept your changes. The new permissions will appear in the permissions table above.

**NOTE**: When you select Modify Right or Remove Right only, the Read Right will be ticked automatically. When ticking any permissions above (Modify, Remove or Read only), if you set the * membership for a group, this permission will be granted to all users of the group, regardless of their membership role.
**Editing permissions**

Editing permissions allows you to add more or remove a specific right granted to a user or membership.

- **Define** the permission of a user or membership in the permissions table.
- **Tick/Untick** the checkboxes corresponding to the rights you want to grant or remove respectively.
- **Click Save** to accept your changed rights.

**Deleting permissions**

- **Select** the permission of a user/membership in the permissions table.
- **Click** the icon then select **OK** in the confirmation message.

*NNOTE: You cannot delete your own permissions.*

**7.2 Upload files**

Uploading files from your local devices is a fast and efficient method to create and store your documents in **Documents**.

There are 2 available ways to upload:

- **Using the Upload button** - Define the folder where your files will be stored, click **Upload** on the Action bar to open the File Upload window. Browse and select your desired document, then click **Open** to start uploading your selected files.
- **Dragging and dropping** - Simply drag and drop files from your local device to your desired folder.

When you start your upload, you will see the **Upload Status** window at the bottom. In this window, the progress bar will appear next to the files which are being uploaded.

*NOTE: You now can upload multiple files from your local devices by selecting them at the same time.*

*NOTE: The upload size depends on the size limit that your administrator set up in the 'Edit' mode of **Sites Explorer**. If your file size exceeds the limit, the alert message will appear.*
If the name of your uploaded file is the same as that of an existing file in the same location into which you are going to upload, you will receive one warning in the dropzone that your file is already in use. Here you can decide to keep both (your uploaded file and the existing file), replace the existing file with your uploaded file or cancel your file upload.

7.3 Working with basic actions

- **Viewing a document**
  - Define the document, then select from the Right-click menu or on the Action bar.
  - Your selected document is opened in another tab with the link containing the document path.
  - Simply double-click the document in the Icons view, or click the document title in the List view. Your document will be opened directly in the main panel with its path at the address bar.

The Documents application provides a viewer for common file types so users can read Office documents, view images or play videos directly.

The following file types are viewable:

- Printable files: pdf, doc (and other Office files)
- Images: png, jpg, jpeg, gif
- Audios/Videos: mp3, mp4.

For these file types, the Document Viewer opens by:

- simply clicking on the file
- when you select the file from the list, click on View Document in the action bar
- right click on file in the left navigation pane and select View Document from menu (or click a document preview thumbnail in the Activity Stream).

*Note: If the document is an unknown type, you have the option to download it to your local machine and open it with another application.*

Usually you are always able to view pdf and MS office files. If you cannot view an MS Word file, for example, contact your administrators.
The viewer provides a large viewing area and some functions for documents:

- **Search**: Click the Search icon to open the Search bar and click it again to exit.

- **Download**: Click the Download icon to download the file.

- **Full screen mode**: Click the Switch to Presentation Mode icon to read in full screen. Hit Esc key to exit this mode.

- **Print**: Click the Tools icon then select Print.

- **Only in Activity Stream**: You will see the Comment area on the right side when you open the viewer. If it is hidden, you can bring it back by clicking the rightmost arrow icon. In the Comment area, click the Like icon to like the post. Click it again to unlike.

- **Images, Audios and Videos**

  For viewable media types, the available functions are **Download**, in Activity Stream also **Comment** and Like.

  *Note: Audio/Video playback may require appropriate browser plugins. A message like "Video format or MIME type is not supported" indicates that you may need to install or enable some plugins for that media type.*

- **Copying/Cutting & Pasting**

  There are two ways to cut/copy & paste content:

  The first way:
  - Select COPY or CUT from the Right-click menu or on the Action bar.
  - Select the destination where the copied/cut content is stored, then select from the Right-click menu or on the Action bar.
  - The copied/cut content (and its children) will be pasted into the new selected path.

  *Note: The Paste function is enabled only after the Copy/Cut action is selected.*
The second way:

- Select COPY or CUT from the Right-click menu or on the Action bar.
- Select the destination that you want to be the parent of the content which is copied/cut.
- Select on the Sidebar to open the Clipboard window.
- Click in the Clipboard window to paste the copied/cut content into the selected destination.
- You can click to delete the specific content from Clipboard.
- You can also click the Clear All link to delete all from the list.

**Deleting content**

- Select from the Right-click menu or on the Action bar.
- Click Delete in the confirmation message.

**NOTE:**

- You can only take the Delete action if you have the permission on that drive.
- You can delete multiple content at the same time by holding the Ctrl (on Windows) or Command (on Mac) key and clicking the desired files and folders.
- If any folder is deleted, it means its child folders and references (if any) will be deleted accordingly.
- If the deleted content has a symlink, this will be also deleted.

**Restoring content**

Once you have deleted the content, you will see a message at the top, indicating that your deletion is completed successfully. If you want to restore your deleted content immediately, click the Undo link.

The deleted content is stored in the Trash drive. By going to this drive and selecting Restore From Trash, you can restore your deleted content.

**NOTE:** Currently, only administrators have the right to access the Trash drive. Deleting any content from the Trash drive will remove them permanently.
7.4 Collaboration

Document management system is a fully-featured application that allows collaboration between researchers/teams in different ways:

- Real-time document editing: the Open in Office feature enables file editing by different users in real-time making sure the document is automatically locked for other while in use and the saved document gets automatically a new version.

- File versioning is done automatically by the system, once changes have been made. Users are able to manage versions of the documents they created. All other users who have access to the document are also able to compare the versions and changes made on the document.

- Sharing files via Activity Stream is another way of collaboration, e.g. making a restricted document available for read purpose only. In Activity Stream users are able to comment on it.

- Symlink function is useful for sharing folders and files between workspaces/teams for collaboration and review processes.

7.4.1 Editing a document

With the Open in Office feature, you are able to easily edit documents, spreadsheets and presentations in the native applications installed on your client, without keeping a local copy. You will be able to open not only Office formats, but also virtually any file format as long as an application is associated with it in your client.

Depending on the file type, a new contextual action appears as below:

- **Open in Word** for file types: .docx, .doc, .docm, .dot, .dotm, .dotx.
- **Open in Excel** for file types: .xltx, .xltm, .xlt, .xlsx, .xlsm, .xlsx, .xls, .xl, .xlam, .xla.
- **Open in Powerpoint** for file types: .pptx, .pptm, .ppt, .ppsx, .ppsm, .pps, .ppam, .ppa, .potx, .potm, .pot.
- **Open on Desktop** for Non-MS Office files that are different from Word, Excel or Power Point files.

*NOTE: These buttons will not be displayed in case multiple files are selected. The labels used for these buttons can be set by an administrator.*

By clicking either of these buttons, you can open and edit that document in one native application that is registered on your client. In case there is no application registered for one file type, one message appears, saying that you have no application registered to open that file.

- After editing the document and saving, a new version of the document will be automatically created when it is saved within the Office application (not downloaded).
- When one document is currently opened by one user, the Lock icon will appear next to that file. If you still want to open this file, one message saying that you can open it in the Read-only format will appear.

It is recommended you use the last versions of Firefox and Chrome.
7.4.2 Versioning

A versioned document is one which can be recovered at any given time. You need to clarify the following points:

- Once "Version" is activated for a document, this is called a "versioned" document.
- The saved state of a document is called "version".
- Versions created for a document behave as parts of the versions history.
- The version on which you are currently working is called the "base" version.

Versioning is an optional feature, so you need to activate this for an independent file by the following steps:

1. Open the document you want to enable versioning.
2. Click on the Action bar. The following message will appear.
3. Click Activate to enable versioning for the document.

In the Documents application, there are two ways to create a version for a document. You can go to the folder that you want to create a new document version and try one of the following ways.

➢ The first way

Upload a file (or multiple files) to this folder by using the Upload button on the Action bar or dragging/dropping this file directly from your computer.

- If this is a totally new document and the versioning is enabled for the folder or the drive that contains this folder, the first version will be created as below:

If the versioning is not enabled, no version is created.

- If there is an existing versioned document with the same name as the uploaded file, a popup with the following suggestions is shown:
- **Keep both**: no version of the existing document is created, but a new document is created with the same name (as a sibling document).
- **Upload new version**: a new version of the file is created with other information, such as title or description of the old document kept on the new version.
- **Cancel**: the upload is cancelled.

Otherwise the existing document is non-versioned; there will be a different option for you to replace it instead of creating a new version:

![Image of file upload options]

This option will totally remove the previous document and its version history, then create a new document with other information, such as title or description from the new document itself.

#### The second way

Copy and paste a document (or multiple documents) to a folder which contains a document with the same name. If the document is versioned, there will be a confirmation popup like this:

![Image of copy document confirmation]

In which, the options Keep Both, Create a new version and Cancel are exactly the same as the Keep Both, Upload new version and Cancel options respectively in the first way. Besides, if you upload multiple files, ticking the checkbox "Remember my choice for all others versioned documents" will apply the selected option for the remaining versioned files.

If the document is non-versioned, the options will be the same as those in the first way.

#### Versioning via File Upload

1. Select the File Upload from the Activity Stream or the top navigation bar.
2. Upload a file to a folder that contains a document with the same name:

![Image of file upload]

#### Managing versions

You can manage your versions by comparing with the current version, adding/removing labels, viewing/deleting versions or restoring to a specific version. All such management actions will be done in the Version History window.
Comparing two versions
1. Check two versions among the versions list of the document/content.
2. Click on Compare selected versions buttons.
3. A page appears to highlight changes done between the two selected versions. If the update contains an addition, it is highlighted in green. If the update contains a deletion, it is highlighted in red.

Restoring a version
1. Define the version that you want to restore as the base version by checking it among the version list.
2. Click the icon from the column Action that is in the version's line to make the selected version become the base one.
3. Click the icon to view the document at the selected version.
4. Click the icon corresponding to the version you want to delete. Click OK in the confirmation message to accept your deletion.

You can give a summary to each document version. For that purpose, simply double click on the label Click here to add a summary, fill in the text field then save by clicking on the Save icon.

You can abandon the summary addition by clicking on X.
7.4.3 Share files via activity stream

Once you have finished uploading or sharing a file to the Documents application of your particular workspace, one new activity will be created on Activity Stream.

Here, you can see the following main information of the uploaded file:

- The file name (1) or title (2), if any.
- The file description (3), if any.
- The file version (4) and size (5), if any.

From Activity Stream, you can:

- View the document in a larger window.
- Download the document.
- Click Edit icon to go directly into the Documents application and edit this document.
- Comment to give your idea.
- Click Like icon to show your liking to the uploaded document.

Note: Many of the actions on a file (for example, uploading, editing or sharing a document) will be automatically shared on Activity Stream although you do not take direct actions to share them. As a result, other members can see what you are doing on your content via Activity Stream and they will be notified about this activity.

7.4.4 Symlink

You can link items (folder, file) item within the same workspace or in another workspace by adding symlink to the original item. Content changes/actions in either the original or symlinked item will be automatically synchronized in both locations. Deleting a symlinked item means removing the link to the original file not its content. Deleting original item will remove automatically the symlinked item.
8. Calendar actions

The global Calendar interface has 4 basic components.

1. The Toolbar contains most of the actions in Calendar, such as
   - create a new event
   - switching between view modes (see Calendar View)
   - performing quick and advanced searches
   - changing calendar settings

2. Mini calendar where you can go backward/forward with months by clicking on the arrows. Also, you can jump to your desired date by directly clicking the date.

3. Calendar View pane where you can create events quickly and view your own events.

4. Calendars pane includes:
   - Group Calendars refer to calendars of workspaces in which you are a member.
   - Task Calendars display all tasks assigned to you. Additionally, in Task Management application there is a possibility to integrate an individual project calendar, but for viewing purposes only!

➢ Group Calendar

In workspaces you can access directly a filtered group calendar, i.e. a calendar view related only to your workspace events. Group calendar in workspace is accessible via space application Agenda. You can create a new event easily by clicking anywhere on the empty event fields, or hitting the button +Event on the top left corner of the calendar view.
8.1 Calendar view

Global and group calendar have the same view. Depending on the view mode preferences, which can be defined in Calendar Settings, the Calendar View can be displayed in: Day, Week, Month, List, or Workweek.

Tasks/events which are scheduled "All day" will be displayed on the top of the time schedule.

In the upper right corner it is possible to filter events by event category. Default Event Categories are: Meeting, Conference, Workshop, Holiday, Other Events. You can add new Category in Add/Edit Event form or in Calendars actions by selecting Add Event Category.

NOTE: Only events and tasks of active calendars in Calendars pane (i.e. active by tick in the box 🎯), will be shown in Calendar View pane.

➢ Day View

Day Calendar shows all events and for a specific day, sorted by the time they are scheduled. By using the arrow icons, you can move backward / forward in Calendar.

Clicking on the event will display relevant information.

If you have Edit permissions, double-clicking the event will display the Add/Edit event form, where you can edit the information.

➢ Week View

The Week View gives you an overview of all events and tasks for a specific week. All other properties are the same as in Day View.

➢ Month View

All tasks and events of the month can be made visible in Month View. Additionally to Day and Week View properties, you can quickly delete events. For this, select the box next to the desired event (title) and hit the 🗑️ in the upper left corner.
List View

The List option lists all events of the day. In contrast to Day View, you can select an event and automatically the Event Details window containing all relevant information will be displayed below the calendar. You can Edit the event or Download the attachment by just clicking on it.
8.2 Scheduling an event

Calendar application allows you to create/add a new event quickly in different ways:

- Click on the toolbar. The Quick Add Event form will appear.

- Right-click the Calendar View pane, then select Add New Event from the drop-down menu.

- Go with your cursor over the desired calendar in Calendars pane, then click the that appears. Click Add Event from the drop-down menu.
Click the appropriate time slot in the Calendar View pane.

Beware of the default time slot "All Day". Remove selection, if the event is limited to a certain time period.

**NOTE:** When selecting a proper Calendar for the event, beware of selecting a Group Calendar. Personal Calendar is disabled and event cannot be displayed if saved in Personal Calendar.

In the last step select Event Category and Save changes.

Add more details to Event

In the Quick Add Event form next to the Save button, there is also a possibility to add More Details to the event:

- Location
- Priority
- Repetition
- Files (attachment)
- Reminders via email
- Availability
- Participants and send invitations
- Schedule/modify event start and end times

Add participant to event

Repeat "add and event" procedure. In the Add/Edit Event form you are able to edit or add new event details, set email reminders for the event

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or add participants to the event. For this click on the corresponding Tab.

If you want to add an event, which is not workspace-specific (i.e it is not open only to a group of people, but requires attendees from outside one's workspace), the Participants feature is the right tool.

**NOTE:** Beware of applying the option **Ask** or **Always** in order to send invitations to the invited participants via email.

- You can add participants by clicking on the "+" sign. The Invitation window opens.
- Click on user icon to select Users. Optionally write an invitation message.
- If you want to select a group, search for it or select is from the list of Groups.

**NOTE:** Multiple selection of participants is allowed, i.e. mix of users and groups / spaces.
8.3 Edit calendar

Group Calendars

NOTE: You can ONLY edit group calendars that you created. For group calendars which are created by other users, you can ONLY edit them if you are granted the Edit permission.

To edit specific group calendar, hover your cursor over the calendar which you want to edit.
- Click settings icon 🛠 that appears
- Click Edit from the drop-down menu
- Make changes on the calendar
- Click Save to accept your changes.

Optionally, the Calendar application allows you to select different colors for all types of calendars to recognize them easily.

Deleting a calendar

This function allows you to remove any calendars and all their events.
1. Hover your cursor over the calendar which you want to delete, then click the 🛠 that appears.
2. Select Remove from the drop-down menu.
3. Click Yes in the confirmation message.

NOTE: You cannot delete group calendars created by other users if you are not granted the Edit permission.

Task Calendars

In contrast to Events, Tasks are created in the Task Management application. By enabling the feature "Calendar Integration" for one project, all tasks of that Project that have the time schedule will appear in the Calendar of that Task/Project and Task Calendars in the Calendars pane.

It is not possible to edit Task calendars.

When clicking on the Setting icon of a particular calendar, you only have the option to Refresh the calendar.
9. Manage workflows with Tasks

Instructions on how to work with the Task Management application, including capturing a task and managing projects effectively.

*Tasks* is a management application for all collaborative activities/tasks. These tasks are organised in groups in *My Tasks, Projects* and *Labels*, allowing individuals and teams to manage tasks and communicate work progress effectively.

After opening the Tasks application, you will see a page divided into the following main work areas:

- **left pane**: tasks are grouped into three sections (my tasks, projects, labels).
- **central pane**: displays the selected *container of tasks* in the left pane (e.g. project: “EC Finalize Sampling document”).

Selection of a task will additionally display

- **right pane**: displays the details about the selected task in the central pane (e.g. task: “Deliver final sampling document 1/10/2016”).

![Tasks Application](image)

**NOTE**: The right pane shows the information about a task. It appears once a specific task within a project has been selected.

The difference between the global and space Tasks application is the structure of the left pane. In Tasks on homepage the left pane includes the global filter My Tasks, additionally to Projects and Labels menu.
My Tasks contains all individual tasks, i.e. which are assigned or somehow related to you. You can manage these tasks individually by filters corresponding to their due date:

- **Incoming**: tasks that are not yet assigned to a project.
- **All Tasks**: unfiltered list of all tasks assigned to you
- **Overdue**: tasks with a past due date
- **Today**: tasks that are due today
- **Tomorrow**: tasks that are due tomorrow
- **Upcoming**: tasks which are due in the next seven days.

### 9.1 Projects

Projects manages the workflow of tasks that are assigned to a project. Only projects accessible to you (e.g. workspace projects) will be displayed. The purpose of Projects is to manage the workflow of tasks that are included in this specific project.

Each workspace contains a project with the identical name, which will automatically be created when the Tasks application is added to the workspace.

- Select a project to display all its assigned tasks in the central pane.
- You can always add new projects by clicking on the "+" icon next to the Projects header.

- **Sub-project**

A project can have any number of sub-projects and a sub-project can also have an unlimited number of smaller sub-projects. These sub-projects will inherit permission and workflow from their parent project, and you can change them later.

- Select the project you want to add a sub-project
- Click on the ">" icon to open the options
- Select “Add Project”
The central pane, also known as project workflow, displays the list of tasks filtered via the left pane and top filter. By clicking on the Projects or Labels header title, a List view of all tasks assigned to projects or labelled tasks will be shown.

When selecting a particular project, an additional management view - Board view is available. Board view provides different ways to manipulate your tasks. By default, a new project will have the following workflow: To Do, In Progress, Waiting On and Done. Alternatively, you can change the project workflow later in the Board view.

**NOTE:** For each new workspace, a project with the same name will automatically be created when the Task Management application is added to the workspace. If you add a task to a workspace project, it will be accessible to all members of this workspace.
9.2 Tasks

Select a project to display all its assigned tasks in the central pane or to add a new task.

The Project’s pane displays the project workflow, i.e. the list of tasks added to a particular project. Project tasks can be shown in two views: List view and Board view.

**List view** displays a list of all tasks assigned to that particular project, according to the selected sorting and grouping function. Labels (if any already tagged) and other optional information such as *Due date* or *Priority* of the task are shown on the right hand side.

**Board view** provides different ways to manage your tasks. By default, a new project will have the following workflow: *To Do, In Progress, Waiting On* and *Done*. Alternatively, you can change the project workflow later in the Board view.

- Add new task by clicking on the button ICON. Automatically the task will be assigned to “To Do” category/status.
- You can easily change the status by drag & drop.

The right pane displays details of the task that is selected from the central pane. Here you can add/modify any information of the task and also write a comment.

The task details include the following items:

1. **Name of the project** that the task belongs to (only one project can be selected). In case the task is not assigned to any project, this field says "No Project". To remove a task from a project, hover the cursor over the project tag and click on "x".

2. **Labels** that are assigned to the task (one or more labels are allowed)
3. **Title** of the task (from 1- to 250 characters)

4. **Due date** of the task

5. **Assignee** and **co-workers** that are assigned to the task (one assignee, but multiple co-workers are possible)

6. **Status** of the task in the project workflow. Note that this information is available only for the tasks that are assigned to a specific project

7. **Description**, only text and pictures allowed (no check box)

8. **Tags** added to the task

9. **Schedule** of the task. If no schedule is specified, this field says "Unscheduled". To remove the current schedule, hover the cursor over it and select the deletion icon that appears

10. **Task priority** (you can choose between 4 values, including High, Normal, Low and None)

11. **Comments** tab allows people to discuss about the task, while the **Changes** tab shows a history of all changes of the task.

12. **Mark as completed** feature is an active button. Clicking on it will mark the task as completed, and it will disappear from the list and Board views unless Filter is set to "show completed tasks".

**Task Management activities**

You will receive the Task notification by Email or directly on-site when someone:

- Assigns a task to you
- Adds you as a co-worker of a task
- Changes the due date of your tasks
- Marks your tasks as completed

![Assigned Task](assigned_task.png)

**NOTE:** These notifications are available only if the Task Management add-on is installed by your administrator.
9.3 Labels

*Labels* manages tasks by labels that user creates in order to classify tasks and to manage tasks more easily. You can easily create a new label by clicking on the "+" icon next to the header.

*NOTE: Labels is an individual feature, i.e. created label categories are visible only to you.*
10. Recommendations

Beware, this manual is a brief guidance to working with the most useful tool for the survey projects. However, SMaP is not a standardized intranet portal but customizable according to the project requirements. Therefore, this guide may not include the wide range of technical possibilities and description of functions which are possible with the actual software and additional development work. For information not included in this guide we encourage you to consult the eXo Platform User Guide 4.4.

Here are some recommendations on how to cope with some known troubleshooting:

- It has been proven to be a good practice, to open the portal and get informed about the recent activities as the first thing when starting a working day.

- In case of long browser response time we recommend to “Refresh” the browser window.

- Because SMaP is a social intranet and supports transparent work, you should be aware of your login behavior, i.e. make sure you close a session or sign out of the portal when you finished your daily work. Otherwise, you will appear in “Who’s online” as an active user and might miss any information or request.

- If you work on the several pages of the portal simultaneously, e.g. intranet, online forms and chat, make sure to conclude one session before continuing/opening another session.

- Beware that your notifications settings are set according to your workflow.

For all other technical problems, please contact our SMaP team at the GESIS – Data Archive.