



Workspaces Guide

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Introduction

Presence's Workspaces is a secure online portal where teachers and administrators can communicate in a password protected environment. This tool features all of Presence's standard collaborative modules, such as calendars, photo galleries and discussion forum as well as content authoring and document sharing modules such as Content pages, files, folders and the knowledge repository.

About this Guide

Many modules in the Workspaces perform and operate in the same manner as the ones available through the live site. For these sections, this manual will cross reference other Presence manuals. Items that are specific only to the Workspaces will be detailed in this manual.

Who Should Use this Guide

This guide is intended for administrators and teachers at the organization. This area of Presence is not for parents, student or community usage. If a school or district chooses to allow external users access to this area, then this will be setup by the district itself.

Vital Information

The Workspaces can be likened to a virtual teachers' lounge. Here teachers, staff, administrators and board members can collaborate and communicate in a secured environment away from external influences.

Administrators also have the ability to password protect specific items in the workspaces from other staff members. This is enabled through the security tab in the workspaces, we will return to this topic later in the manual.

Module

The modules available within the workspaces are seen in other places in Presence's system. The modules here however are only for use within the workspaces. Calendar events from the main school or district calendar can be pushed into individual workspace calendars as well as to other calendar pages on your site.

Security

Via the security module available in the **Workspaces**, administrators and workspace authors can configure who has reading and writing access to the module. This is important in situations where specific items in the workspaces need to be protected from staff use, such as Board Members' workspaces or even a district specific workspace.

Activity

The activity tab allows administrators to determine what activities have been performed on the workspaces. This is especially important if several individuals are participating in a group workspace activity.

Accessing Workspaces

As mentioned previously, only users with logins to Presence's solution have access to the workspaces. The workspace link is provided via the **Published Links** on your site. For ease of use, you may wish to add the Workspaces link elsewhere (for example, in a Quick Links box or via a teacher specific page on the school or district site).

Configuring Workspaces

Security



Presence provides a flexible, powerful, and easy to use security system.

Each object within the server can have its own set of permissions.

Permissions are defined as a privilege granted to a particular user or group on a particular object or group of objects.

A **privilege** is an action that can take place on an object. The privileges common to all objects are **read**, **create**, **delete** and/or **write**. Other privileges may include the ability to **create a comment**, to **vote** and to **upload** a file.

To access the permissions settings, click on the **Security** tab. To learn more about security you can refer to the *SitePublish User Guide*.

Edit Workspaces Homepage

The **View** tab displays all the objects in the workspace.



New objects can be added from the **Add New Item** drop down menu.

To **open** any object, click on the object name.

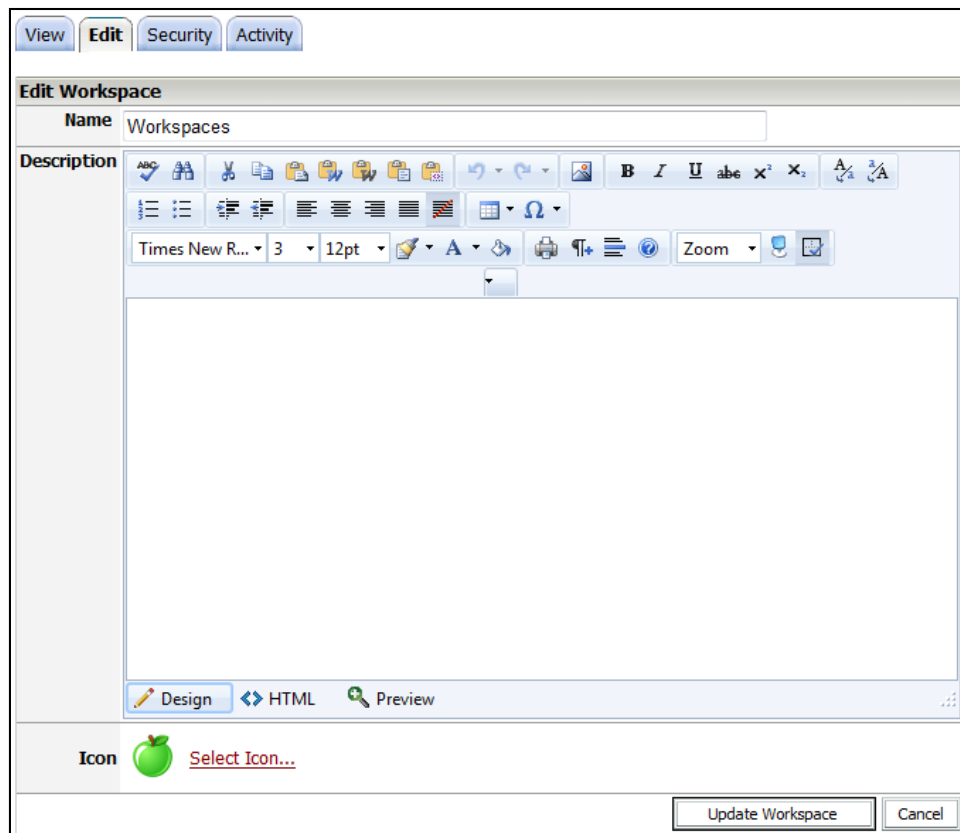
To **delete** an object, select the checkbox next to the name and from the drop down menu at the bottom, choose **Delete Selected**.

To **move** an object, select the checkbox and from the drop down menu, choose **Move Selected**. In the window that opens, locate the destination of the objects.

To **export** an object, select the checkbox and choose **Export Selected** from the drop down menu.

To **import** an object, from the drop down menu, select the **Import Here** option.

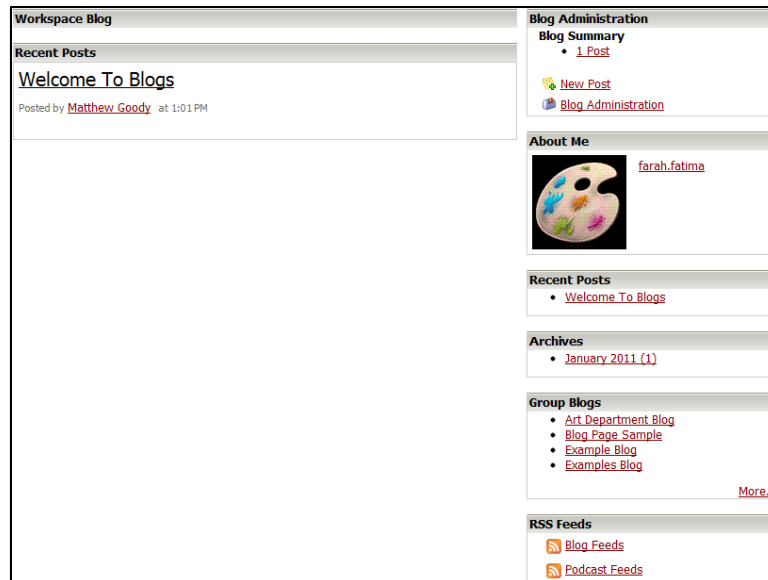
The **Edit** tab allows you to change the **Name** of your Workspace, the **Description** and **Icon**.



To save any changes that you have made click **Update Workspace**.

Module: Blogs

Blogs have become immensely popular in recent years. This is due in part because blogs offer the ultimate communication medium through which individuals can share information and receive feedback from an audience.



Adding a Blog

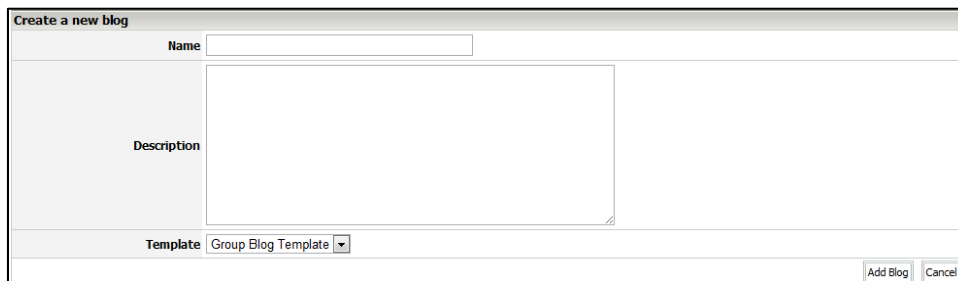
From the **Add New Item** drop down select **Blog**.

Enter in the **Blog Name**.

Fill in a **Description**.

Select the **Blog Template** from the drop down.

Click **Add Blog** to save and add your blog.



To learn more about **Blogs** please refer to the *Blogs* manual.

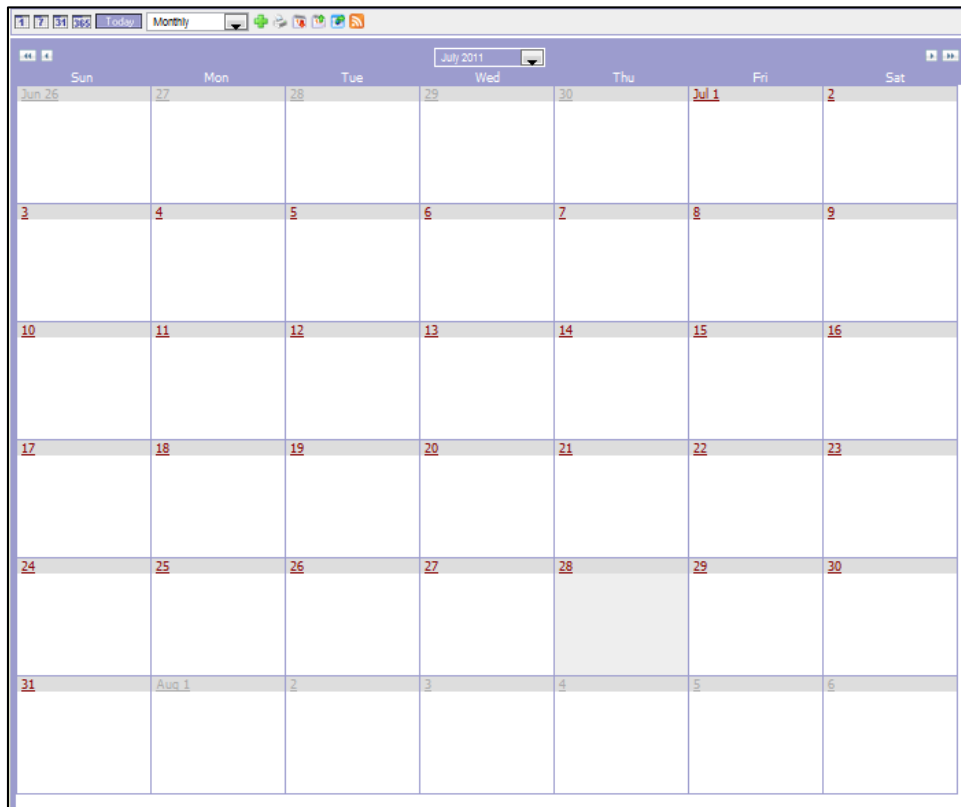
Module: Calendar

Calendars are used to keep track of events that occur over a period of time. The calendar object can be opened in different views:

- Daily
- Weekly
- Monthly
- Yearly

Click on an event to view the event details.


You can use the navigation links at the top of the calendar to navigate through days, weeks, months or years.

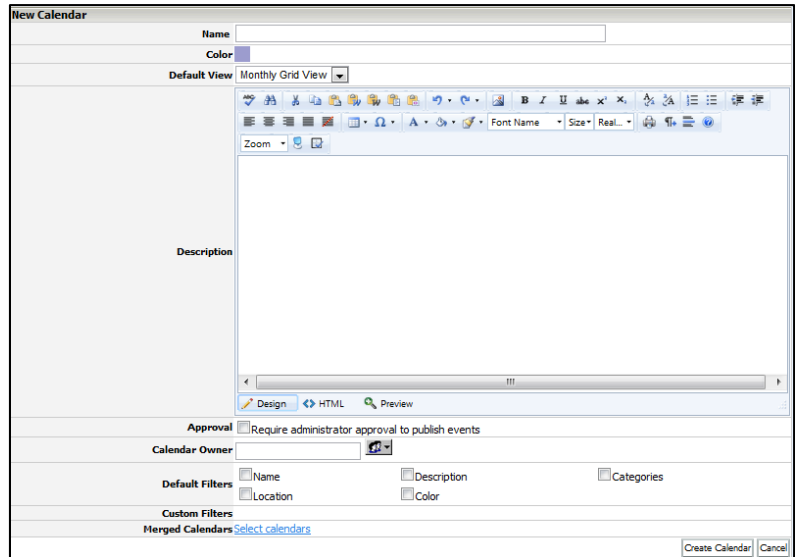


Adding a Calendar

From the **Add New Items** drop down menu select **Calendar**.

Fill in the following fields:

- **Name:** Calendar name
- **Color:** Choose the color of the calendar
- **Default View:** From the drop down choose the default view from the choices of Day List View, Weekly Grid View, Monthly Grid View, Yearly Grid View, and Event List View
- **Description:** Fill in a description for your calendar
- **Approval:** Check off if you require administrator approval to publish events
- **Calendar Owner:** Click on the  button to select the a user
- **Default Filters:** Check off any filters to display in the drop down on the calendar page.
- **Custom Filters:** Check off any filters to display in the calendar
- **Merged Calendars:** Click on [Select calendars](#) to select other calendar(s) from your site or other sites on your domain.



Click **Create Calendar**.

To learn more about Calendars please refer to the *Calendars* manual.

Module: Evaluation

Users can add evaluations to the workspace. These surveys can have different types of questions, from multiple choice questions to essay type questions.

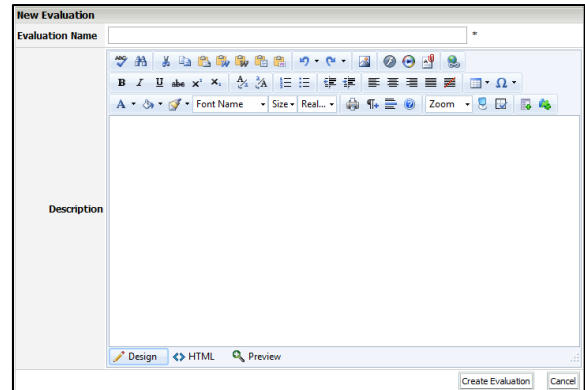
Add Evaluation

From the **Add New Item** drop down menu on the workspace select **Evaluation**.

Fill in the required fields:

- **Name:** This is the name that will be used in the workspace.
- **Description:** This description will be visible when you open the evaluation.

Click the **Create Evaluation** button.



View Evaluation

The **View Evaluation** section displays all the questions in the evaluation, along with the type of question it is. Users can click on the following links:

- **Take Survey:** To actually fill out the survey and answer the questions click this link.
- **Add Question:** Click the link to add a question.
- **Survey Submission:** This allows you to see who has submitted the quiz, at what time and the number of submissions.
- **Export Survey:** This allows you to export the survey questions to other surveys.
- **Import Survey:** This allows you to import survey questions from other surveys.
- **Chart:** This displays a graph of the results that have been obtained.
- **Random Sort Questions:** When checked off and if there are multiple questions this option will display the questions in a random order.
- **Random Select Questions:** You can use this option to randomly select a single question to display if you have multiple questions.

Take Survey

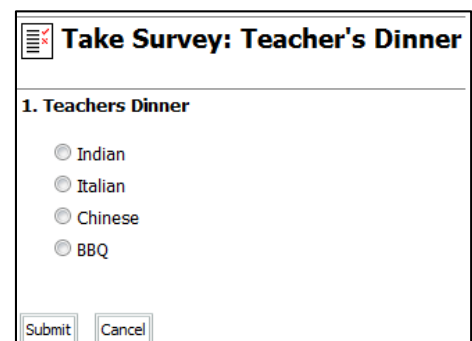
Click **Take Survey** on the View Evaluation page.

Answer the questions provided.

Click the **Submit** button to submit the answer.

Click the **Cancel** button to return to the **View Evaluation** page without submitting your answers.

Click the **Save Answers** button to save your answers and return later to complete the survey.



Add a Question

Click on the **Add Question** link on the **View Evaluation** page.

Select the Question Type:

- **Multiple Choice:** This allows a user to select a single answer for the question.
- **Multiple Selection:** This provides checkboxes for the user to select.
- **Short Answer:** This provides a textbox for the user to type an answer in.

Type in the **Question**.

Set the **Answer**. If the question type is multiple choice or multiple selection, the different options must be added here.

Set the **Points** for the question. Leave this to '0' for a survey.

Fill in the **Feedback**.

Click on the **Add Question** button to add the question to the survey.

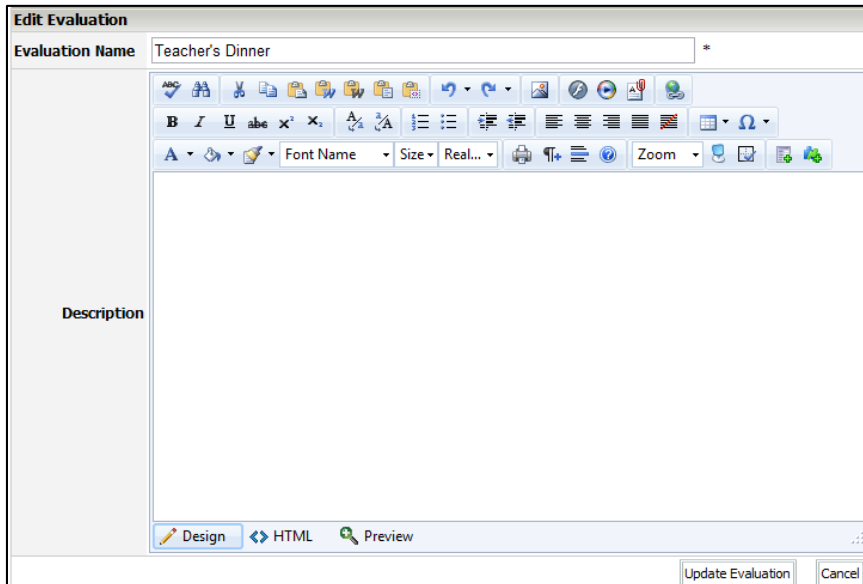
Chart

The charts displays the statistics of the questions answered in pie-chart form.

Edit Evaluation

This section allows you to edit the following fields:

- **Name:** This is the name that will be used in the workspace.
- **Description:** This description will be visible when you open the portfolio.



The screenshot shows the 'Edit Evaluation' window. At the top, the title is 'Edit Evaluation'. Below the title bar, there is a text field for 'Evaluation Name' containing 'Teacher's Dinner'. Underneath is a large, empty text area for the 'Description'. Above the description area is a rich text editor toolbar with various icons for text formatting, alignment, and insertion. At the bottom of the window, there are three tabs: 'Design' (selected), 'HTML', and 'Preview'. To the right of these tabs are two buttons: 'Update Evaluation' and 'Cancel'.

Click the **Update** button to save any changes.

Security

Just like all other modules in the Presence solution you can adjust the security of the evaluation to only be allowed access by all or certain users.

Direct Permissions
Actual Permissions

Permissions Granted To

+ superadmin

Add
Remove

Inherit Permissions

Allow inheritable permissions from parent to propagate to this object

Apply

Activity

The Activity tab will show you a list of activities that has been done to the Evaluation. You can subscribe to be notified if there are any changes by clicking on the subscribe link under **Available Alerts**.


Activities on this object (1-1 of 1)				
Action taken	Description	Occured At	User	Context
Updated	A user updated the properties on this object	2/24/2011 1:26:31 PM	matthew.goody	Workspaces

Available Alerts	
Content Item	
This alert will provide you with an update on changes to this file and its children.	Subscribe

Module: File

Users can add different types of files onto the workspace. These files can then be opened by other members who have access to the workspace.

View File
All Versions
Edit File
Categories
Routing
Metadata
Security
Activity



My Picture	
Author	BTD606540
Size	2.51 KB
Created On	04/22/08 08:36 PM
Version Number	1
Description	

[Add Comment](#)
[Flat View](#)

Comments

Adding a File

From the **Add New Item** drop down menu on the workspace, select **File**.

Fill in the required fields:

- **Name:** This is the name that will be used in the workspace.
- **File:** Click **Browse** to locate and select the file that you wish to add.
- **Description:** This description will be visible when you open the file.

Click the **Add File** button.

View File


When a user clicks on a file, they are taken to the **View File** page. This section also displays any comment made on the file.

Click on the **File Name** to open the file itself.

All Versions

This page lists all the versions for the file, and it identifies which version is currently in use. It also displays any comment on the file.

You can **Add New Revisions** of the file.

View File All Versions Edit File Categories Routing Metadata Security Activity						
All Revisions						+ Add New Revision
Description	Size	Author	Created On	Version#	Action	
 My Picture	2.51 KB	BTD606540	04/22/08 08:36 PM	1		
Add Comment						Flat View
Comments						

You can also **Add comments** to the file. These comments are visible under the View File page as well.

Add Comment

Comments can be added to files for other users to see. To add a comment:

Click on the **Add Comment** link on the View File page.

Fill in the comment into the text area provided.

You can add attachments with the comment by clicking on the **Add Attachment** link.

Click the **Preview** button to view how the comment looks.

Click the **Post Comment** button to post the comment under the file.

Module: Folder

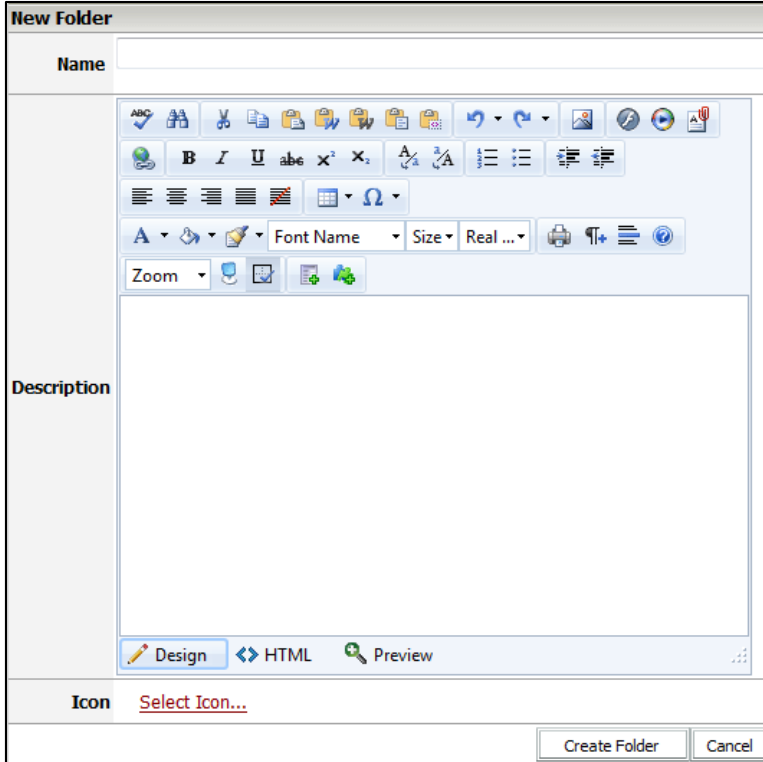
Users can add folders in the workspace to better organize items. Other objects can then be added in the folders. This helps organize the objects.

Adding a Folder

From the **Add New Item** drop down menu on the workspace, select **Folder**.

Fill in the required fields:

- **Name:** This is the name that will be used in the workspace.
- **Description:** This description will be visible when you open the folder.



Click the **Create Folder** button.

Module: Forum

The forum is an excellent tool for conducting quick and detailed discussions on various topics with many individuals participating at once. Here you can establish course topics for you to collaborate on, provide sections for discussion, or simply answer questions all in an organized environment.

Adding a Forum

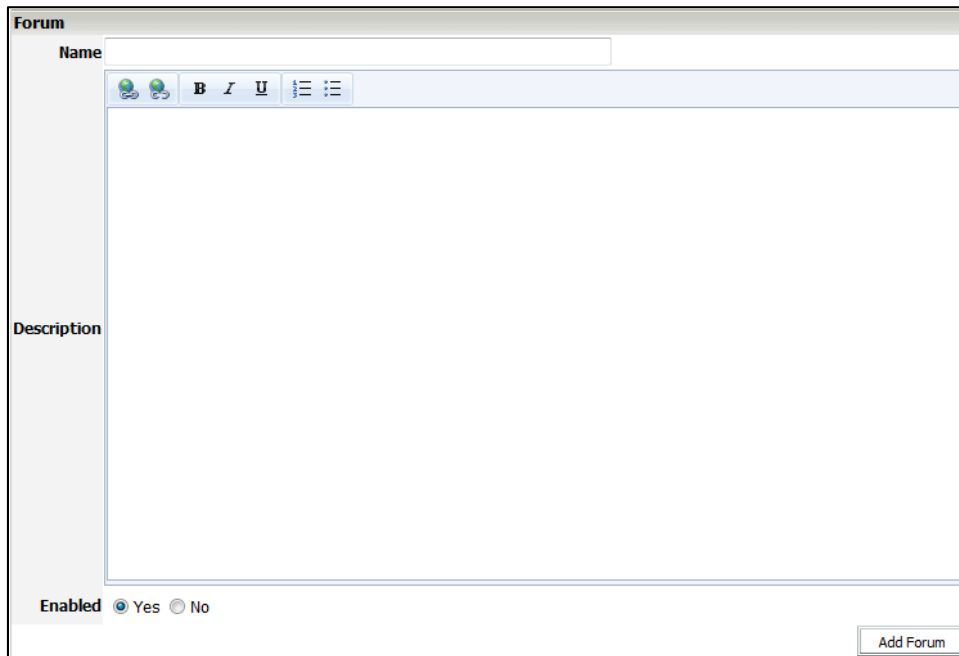
From the **Add New Item** drop down menu on the workspace, select **Forum**.

Fill in the required fields:

Name: This is the name that will be used in the workspace.

Description: This description will be visible when you open the folder.

Select if this Forum is going to be **Enabled**.



Click the **Add Forum** button.

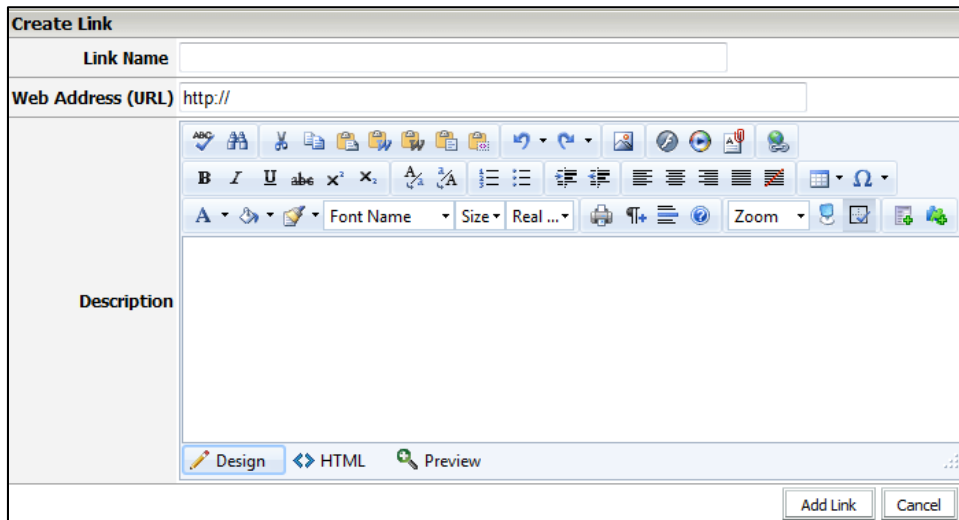
Module: Link

Users can add links onto the workspace. If a user clicks on a link, they are automatically redirected to it. To add a link:

From the **Add New Item** drop down menu on the workspace, select **Link**.

Fill in the required fields:

- **Link Name:** This is the name that will be used in the workspace.
- **Web Address (URL):** This is the web page to which the user will be redirected when they click on the link.



The screenshot shows the 'Create Link' dialog box. It features a title bar 'Create Link'. Below the title bar are three main sections: 'Link Name' with an empty text input field; 'Web Address (URL)' with a text input field containing 'http://'; and 'Description' which is a large text area with a rich text editor toolbar. The toolbar includes icons for undo, redo, bold, italic, underline, font color, background color, text color, bulleted list, numbered list, link, unlink, indent, outdent, zoom, and print. At the bottom of the dialog are 'Add Link' and 'Cancel' buttons.

Click the **Add Link** button.

Module: Form Template


Form Templates are templates that are used as a standardized form from which individual form instances can be generated. They can also be copied and changed to create other new form templates. The form template acts as a master copy of the form and individual submissions are copies of the template. Any changes made to the form template will result in a change to all future submissions for that form.

Adding a Form Template

Select **Form Template** from the **Add New Item** drop down menu.

Enter a **Name** for your form. This will be the display name for your form.

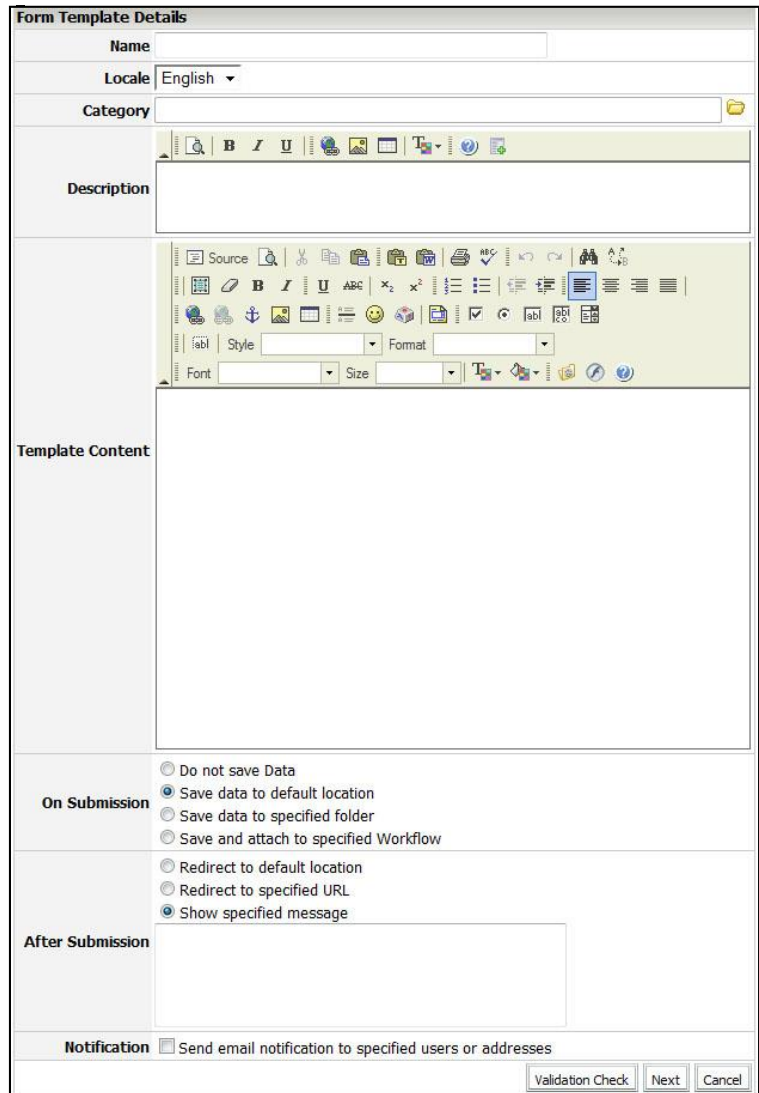
Select a **Locale**.




To add the template to one or more categories, click the  icon to the right of the **Category** field. A list of categories and subcategories will appear.

The **Template Content** area is the body of your form. The Rich Text editor grants you the ability and freedom to design the form as you choose. You may design and customize the form to your specifications.

The **On Submission** area gives options which allow you to control how the form submissions are saved. **Save data to default location** will save the form submissions in the Form Builder along with the template.

The **After Submission** area allows the author of the form template to specify what a user sees after the form has been submitted. By default, the form will reload the page that the form was accessed from.



You can select **Send email notification to specified users or addresses** to send an email with the form contents each time the form is submitted. To add users already on the site, click on  to open the user picker. When the pop-up window appears, select the groups and site users to be emailed on form submission and click . Once all the users to be contacted have been added to the list at the bottom half of the user picker, select .

Once the information has been filled out, click the **Validation Check** button to ensure that all the input fields have been configured correctly. If any fields require additional configuration, a message will be displayed above the Rich Text editor area, detailing the necessary changes. Complete the configurations and click the **Validation Check** button again. When the *Successful* indication text appears, click the **Next** button.

Check off any fields you wish to be mandatory. A form cannot be submitted unless the mandatory fields are populated. You can also enter in a customized **Error Message** to display when the **Mandatory** fields are not filled out on submission.

Mandatory Input		
Input Name	Mandatory	Error Message
First	<input type="checkbox"/>	<input type="text"/>
Last	<input type="checkbox"/>	<input type="text"/>
Email	<input type="checkbox"/>	<input type="text"/>
Email_Me	<input type="checkbox"/>	<input type="text"/>

Click **Publish Form Template** to create the new form template. This will create the first **version** of your form template. To continue editing the form template before publishing, click **Back** to return to the editor page.

Module: Gallery

Photo Gallery allows you to create multiple albums with dynamic features such as the ability to view pictures as slideshows, or allowing for moderated commenting. These galleries are a great way to capture and showcase activities and events that occur.

Adding a Gallery

Select **Gallery** from the **Add New Item** drop down menu.

Enter in the **Name**.

Fill in the **Description**

Gallery Details	
Name	<input type="text"/>
Description	<div style="border: 1px solid #ccc; padding: 5px;"> <p>B <i>I</i> <u>U</u></p> </div> <div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>
	<input type="button" value="Create"/> <input type="button" value="Cancel"/>

Click **Create**.

Module: Note

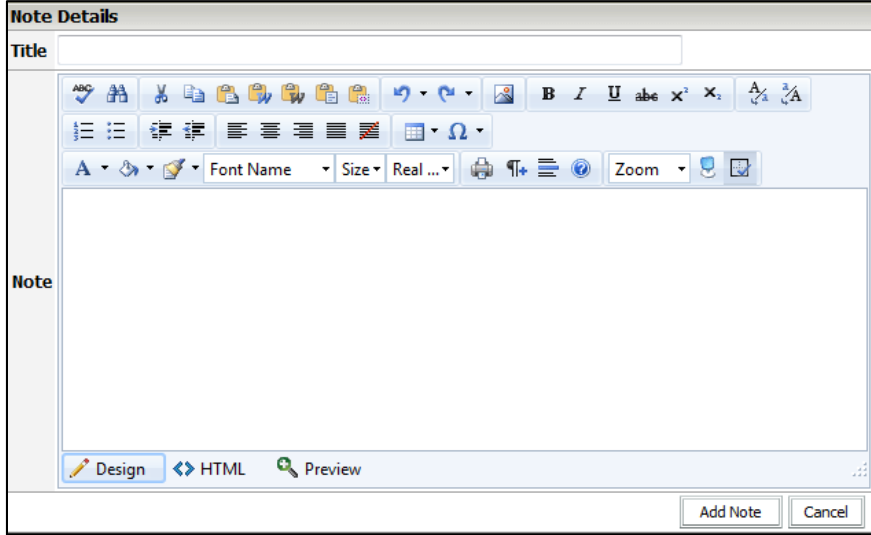
Notes are an excellent resource if you a user needs to quickly type in an idea or reminder for a task to complete.

Adding a Note

From the **Add New Item** drop down menu select **Note**.

Type in the **Title**.

Fill in **Note**.



Click **Add Note**.

Commenting on a Note

Click on **Add Comment**.

Type in the **Subject**.

Fill in the **Message**.

If you wish to add an **Attachment** you can do so by clicking on **Browse**, locate the file on your computer and click **Open**.

Click on **Post Comment**.

Module: Vote

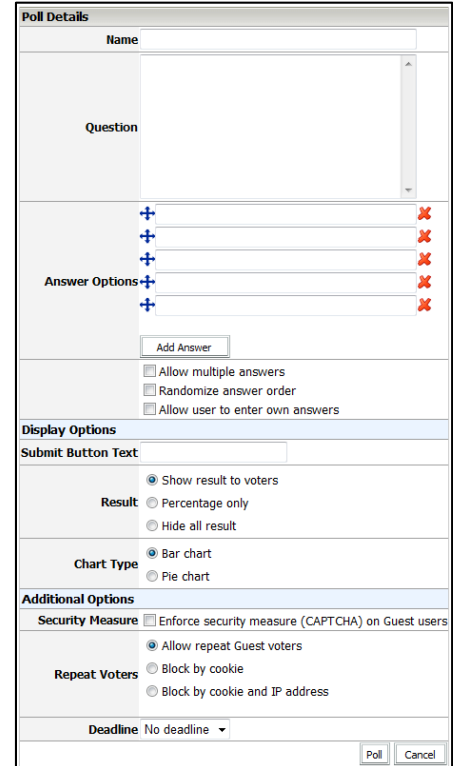
A vote is a poll with a single question. Users can add polls to workspaces or submit answers to polls already posted.

Adding a Vote

From the **Add New Item** drop down menu on the workspace, select **Vote**.

Fill in the required fields:

- **Name:** This is the name that will be used in the workspace.
- **Question:** This is the question that the users have to answer.
- **Answer Options:** Fill in your answer options. If you need more than 5 you can add another by clicking on **Add Answer**.
- **Allow multiple answers:** Will change your question to allow multiple answers instead of just one.
- **Randomize answer order:** Change the order of the list of answers each time that the vote opens.
- **Allow user to enter own answers:** Adds a text box to the question so that a user can type in information.
- **Display Options:** You can change what the submit button text will be, choose whether you want to show the results to the voters, a percentage result only, or hide all results from the voters, as well as to display as either a bar or pie chart.




Additional Options

- **Security Measure:** Allows you to add that a captcha needs to be filled out each time that a vote is submitted to stop spammers.
- **Repeat Voters:** You can select an option to allow repeat guest voters, block by cookie, or block by cookie and IP address.
- **Deadline:** If you would like you vote to close on a certain date from the drop down menu select **Close On** and then select the date and time.

Click the **Poll** button.

View Vote

When users click on a vote object, the system directs them to the **View Vote** page. This page allows users to select their answer. Click the **Submit** button to submit your answer.



The screenshot shows a web interface for viewing a vote. At the top, there are four tabs: **View**, **Edit**, **Report**, and **Security**. The **View** tab is selected. Below the tabs, the question is: "What is your meat selection for the staff barbeque?". There are five radio button options: **Burgers**, **Hot Dogs**, **Steak**, **Chicken**, and **Veggie Burgers**. At the bottom of the form, there are two buttons: **Submit** and **Cancel**.

Edit Vote

This page allows the users to change the same options that are available on the **Add Vote** page.

Click **Update Poll** to save your changes

Report Tab

The report tab will allow you to view the results of your vote/poll as a bar or pie chart. It will also allow you to export the results to a .CSV file that is readable in Excel as well as you can reset the results. You will also be able to see the number of votes that have taken place.

Module: Wiki

The introduction of the wiki has revolutionized the way we view, share, and create content. The traditional method of content creation is a slow, time-consuming process that results in a static document. Wikis, on the other hand, can grow quite rapidly and produce a dynamic, living document that can constantly evolve as new information is introduced. However, with a new method of content creation comes a new host of challenges which must be managed and overcome. This section will teach you how to overcome these challenges and make wikis a valuable part of your Presence experience.

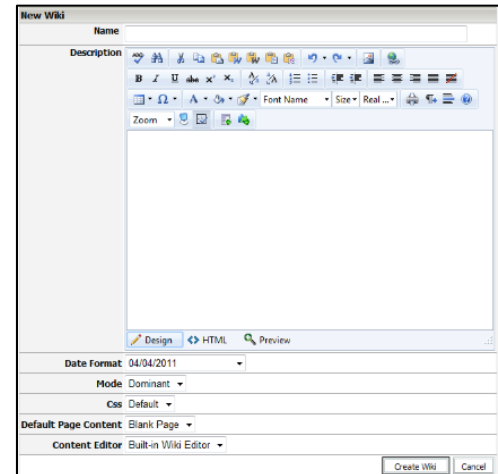
Adding a Wiki

From the **Add New Item** drop down menu on the workspace, select **Wiki**.

Fill in the required fields:

- **Name:** You can use this text field to change the name of the wiki.
- **Description:** You can use this text field to change the description of the wiki.
- **Date Format:** This drop down menu has three options for how dates are displayed.
- **Mode:** **Dominant:** Displays the wiki in full screen mode in your browser window without your page theme. **Inline:** Displays your wiki using your current page theme
- **CSS:** This drop down menu contains different color schemes that effect every page of the wiki. You can choose from Default, Green or Pink.
- **Content Editor:** You can use this drop down menu to select to use either the **Built-in Wiki Editor** or the **Rich Text Editor**.

Click the **Add** button.



Module: Workflow

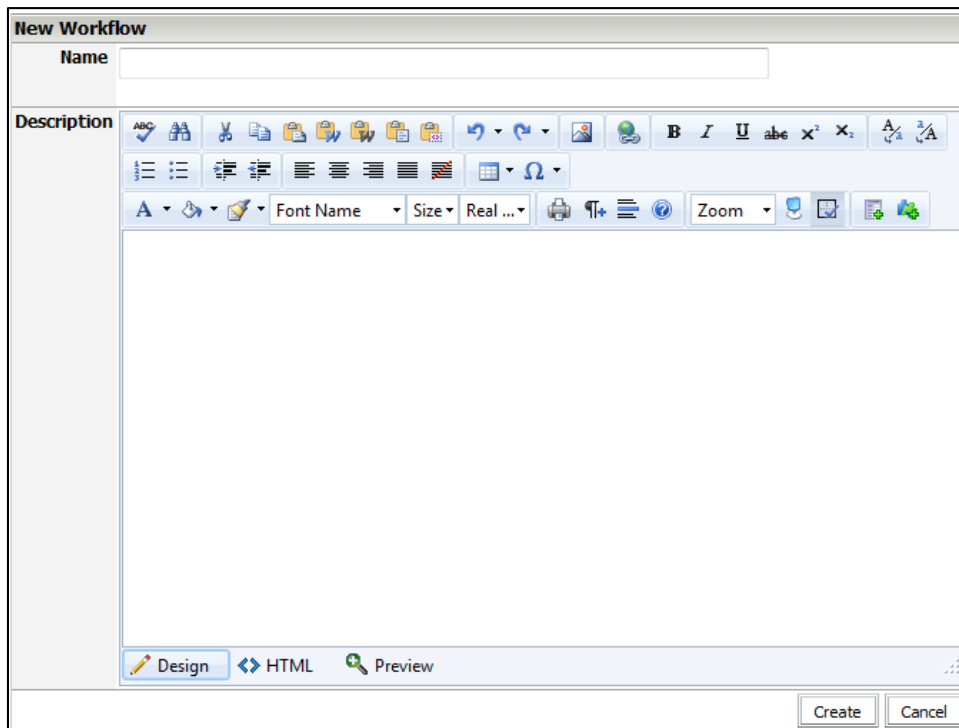
A workflow consists of a sequence of logically connected steps. It is a sequence of operations, declared as work for a person, a group of persons, an organization, and contains one or more simple or complex mechanisms.

Adding a Workflow

Select **Workflow** from the **Add New Item** drop down menu

Fill in the **Name**.

Enter a **Description**.



The screenshot shows a 'New Workflow' dialog box. It features a 'Name' input field at the top. Below it is a 'Description' field with a rich text editor toolbar. The toolbar includes icons for undo, redo, bold, italic, underline, text color, background color, font name, size, real-time preview, zoom, and other editing tools. At the bottom of the dialog are 'Create' and 'Cancel' buttons.

Click on **Create**.

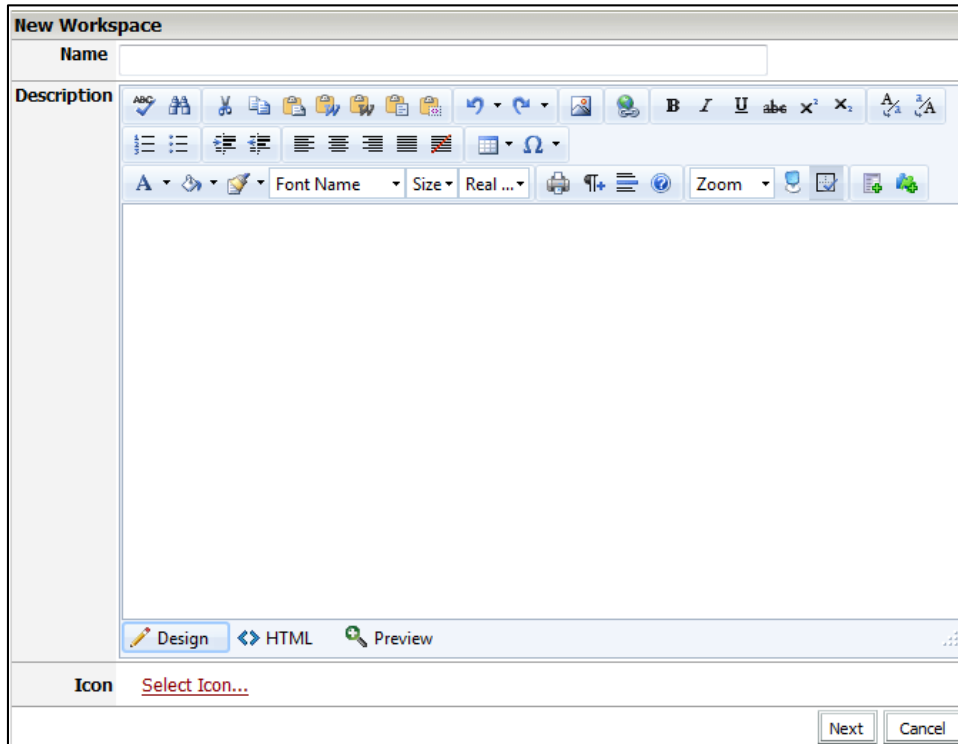
Module: Workspace

Users can add a workspace within the **Workspace**. This will help out a district or school to be able to have a workspace for a specific department or even individual users. To add a workspace:

From the **Add New Item** drop down menu on the workspace, select **Workspace**.

Fill in the required fields:

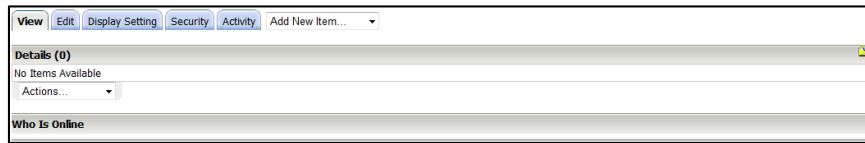
- **Name:** This is the name that will be used in the workspace.
- **Description:** This description will be visible when you open the workspace.



Click the **Create Workspace** button.

View Workspace

The **View** Workspace tab displays all the objects in the workspace.



New objects can be added from the **Add New Item** drop down menu.

To **open** any object, click on the object name.

To **delete** an object, select the checkbox next to the name and from the drop down menu at the bottom, choose **Delete Selected**.

To **move** an object, select the checkbox and from the drop down menu, choose **Move Selected**. In the window that opens, locate the destination of the objects.

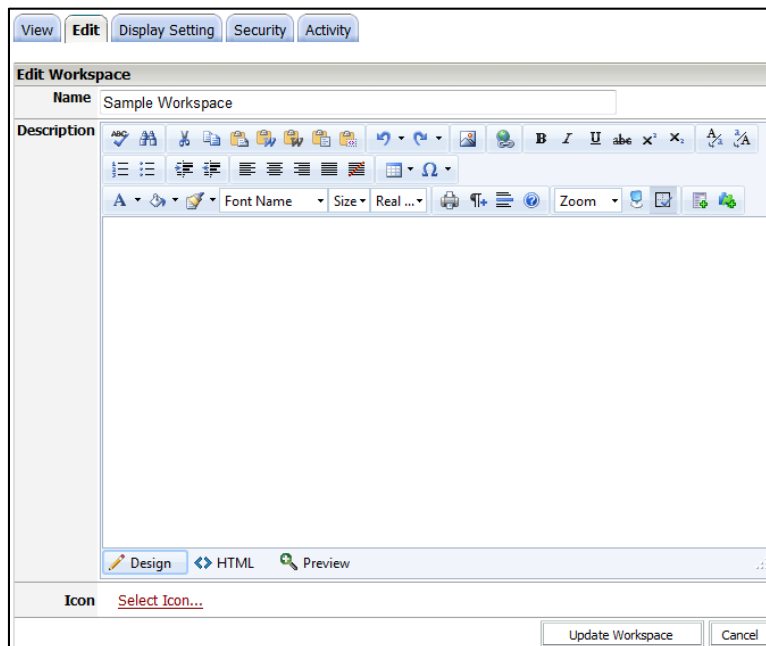
To **export** an object, select the checkbox and choose **Export Selected** from the drop down menu.

To **import** an object, from the drop down menu, select **Import Here** option.

Edit Workspace

The edit workspace section allows you to edit the same options as on the Add Workspace page:

- **Name:** This is the name that will be used in the workspace.
- **Description:** This description will be visible when you open the workspace.

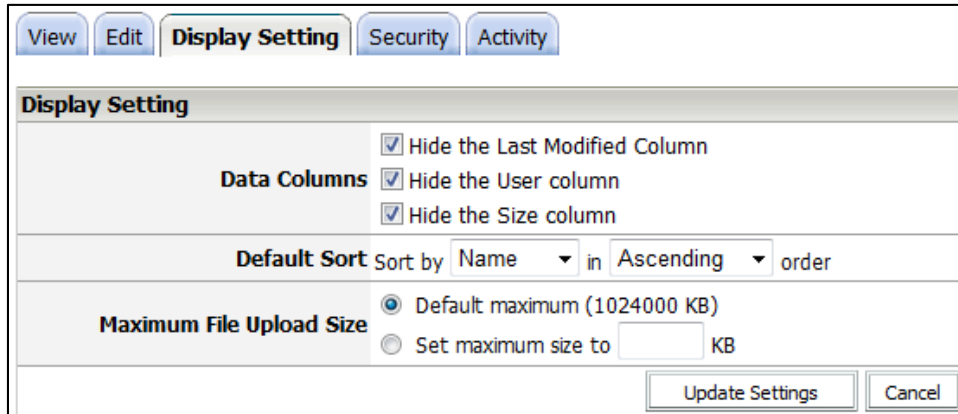


Click the **Update** button to save any changes.

Display Setting

The **Display Setting** tab allows users to change the look and feel of the workspace.

- **Data Columns:** Users can choose the following check box options to Hide the Last Modified Column, Hide the User column, and Hide the Size column.
- **Default Sort:** Will allow a user to change the **Sort by Name, Modified, User** and **Size** from the drop down menu along with either **Ascending** or **Descending** order from the second drop down menu.
- **Maximum File Upload Size:** Users can select to leave the default setting at 1024000 KB = 10 MB or you can select the **Set maximum size to**, and enter in your size in KB. **NOTE:** 1 MB=1024KB



Display Setting	
Data Columns	<input checked="" type="checkbox"/> Hide the Last Modified Column <input checked="" type="checkbox"/> Hide the User column <input checked="" type="checkbox"/> Hide the Size column
Default Sort	Sort by Name in Ascending order
Maximum File Upload Size	<input checked="" type="radio"/> Default maximum (1024000 KB) <input type="radio"/> Set maximum size to <input type="text"/> KB
<input type="button" value="Update Settings"/> <input type="button" value="Cancel"/>	

Once you have made your changes click on **Update Settings**.