



SchoolMessenger[®]

Workspaces Guide

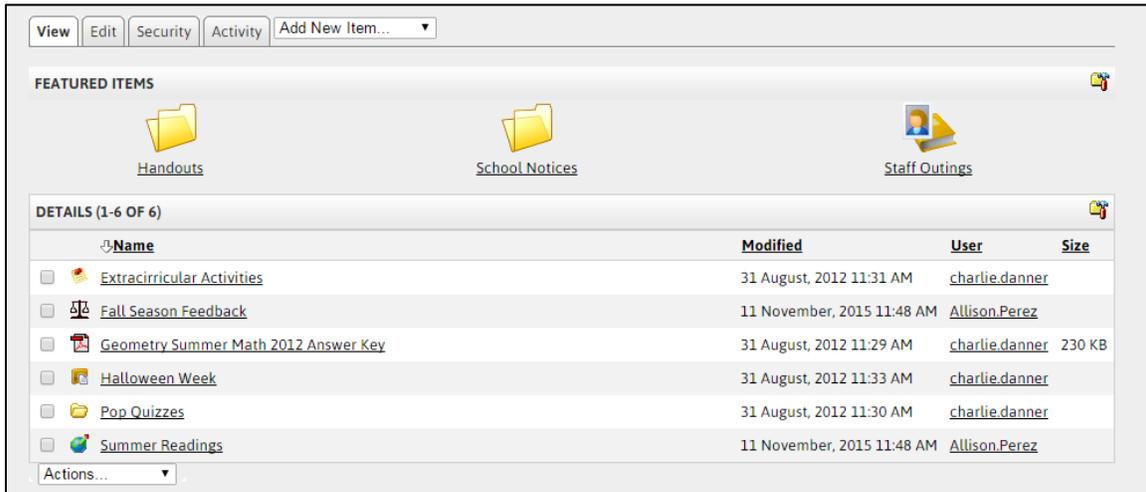
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Introduction

SchoolMessenger's Workspaces is a secure online portal where teachers and administrators can communicate in a password protected environment. This tool features all of SchoolMessenger'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.



By default, only users with user accounts on your site have access to the workspaces. The workspace link is often available 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).

 **Note:** You can also access the workspaces area by going to <http://www.examplesiteurlforyoursite.com/workspaces>. Just add /workspaces to the end of your domain.

Configuring Workspaces

Editing Workspaces

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.

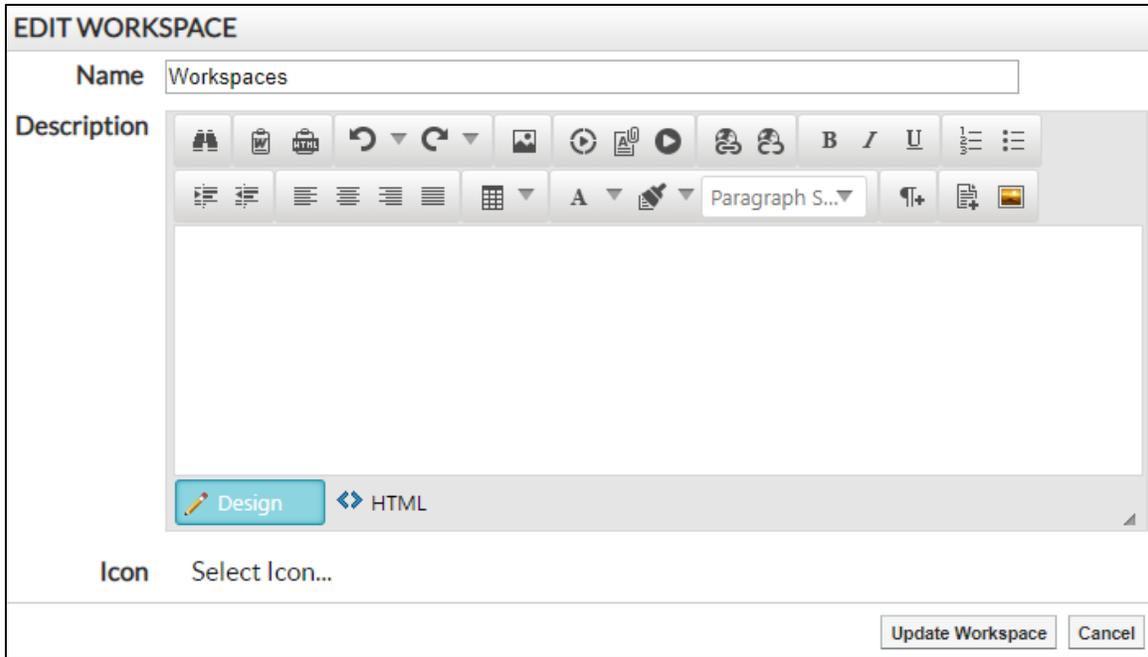
To delete an object, select the checkbox next to the name and from the drop-down menu at the bottom, choose **Delete Selected**.

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.

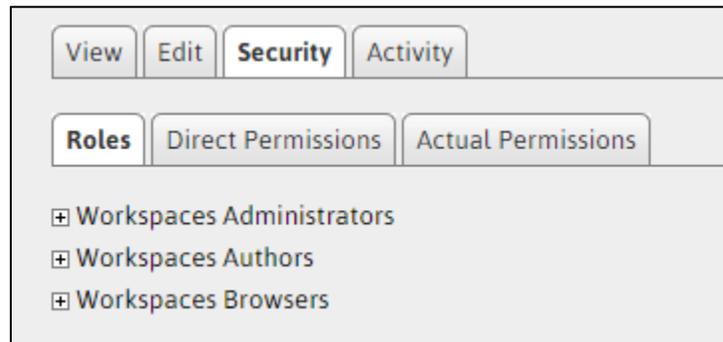
To import an object, from the drop-down menu, select the **Import Here** option.

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**.

Security



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

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

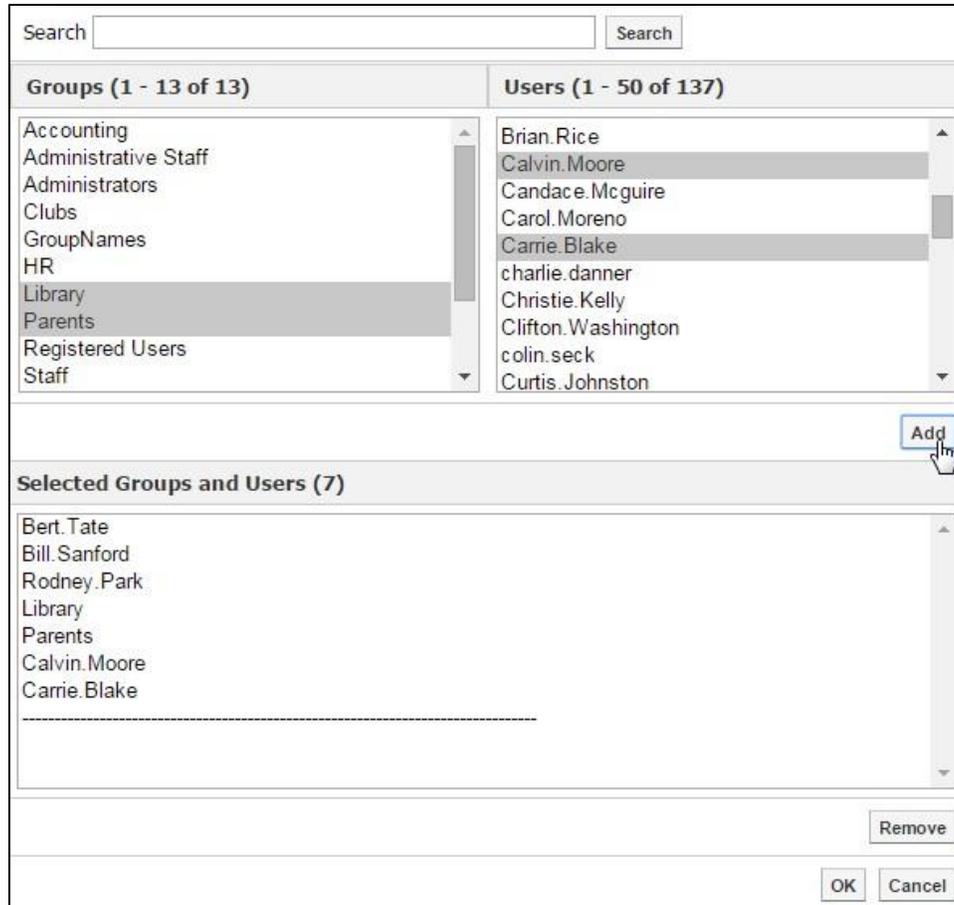
To access the permissions settings, click on the **Security** tab. To learn more about Security on SchoolMessenger you can refer to the **Security** section.

The **Direct Permissions** tab lists the groups and/or users who have been assigned permissions to the page you are currently viewing. Here, you have the ability to **Add** and **Remove** permissions, and also inherit permissions from parent pages as well.

Add Permissions

In order to grant permissions to a group or individual user within the Workspaces, simply click on the **Add** button under the group/user list.

In the following window click on the groups and users and click **Add**.



Search Search

Groups (1 - 13 of 13)

- Accounting
- Administrative Staff
- Administrators
- Clubs
- GroupNames
- HR
- Library
- Parents
- Registered Users
- Staff

Users (1 - 50 of 137)

- Brian.Rice
- Calvin.Moore
- Candace.Mcguire
- Carol.Moreno
- Carrie.Blake
- charlie.danner
- Christie.Kelly
- Clifton.Washington
- colin.seck
- Curtis.Johnston

Selected Groups and Users (7)

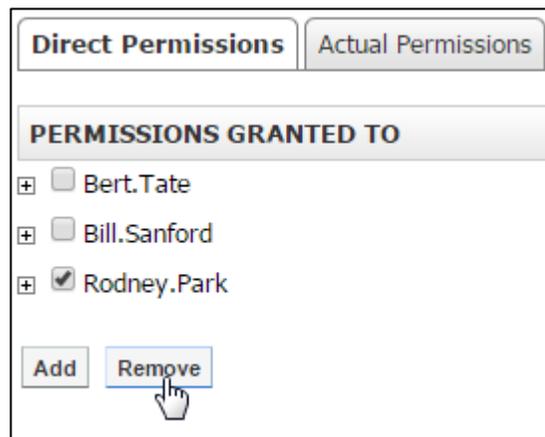
- Bert.Tate
- Bill.Sanford
- Rodney.Park
- Library
- Parents
- Calvin.Moore
- Carrie.Blake

Buttons: Add, Remove, OK, Cancel

Click **OK** to include permissions.

Remove Permissions

To remove permissions from a group or user simply click on the checkbox next to the name and click on **Remove**.



Direct Permissions | Actual Permissions

PERMISSIONS GRANTED TO

- Bert.Tate
- Bill.Sanford
- Rodney.Park

Buttons: Add, Remove

Define Permissions

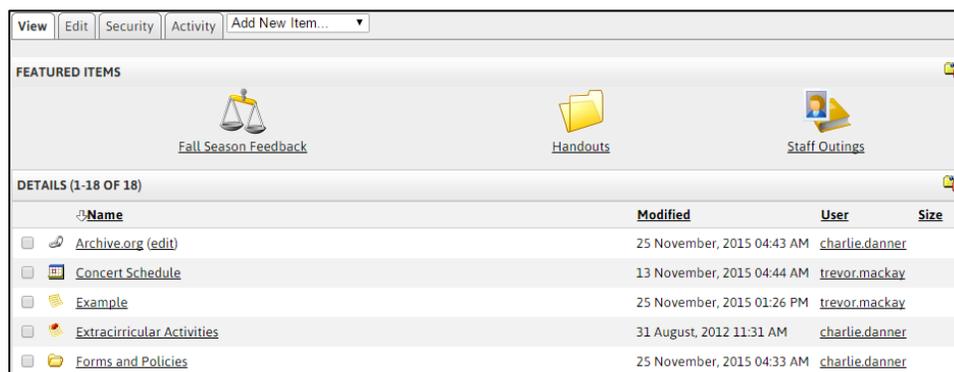
When users are added into the permissions box, they are given **Read** permission by default. The definition of the permissions is included below:

PERMISSION	WHAT IT ALLOWS YOU TO DO
Create	Allows the user to create or add modules to the Workspaces areas.
Delete	Allows users to delete modules from the Workspaces area.
Read	Allows users to simply view the Workspaces but not make any content changes.
Write	Allows users to edit modules added to the Workspaces.
Full Control	Allows the users to control all aspects of the Workspaces: Create, Delete, Read and Write , as well as the ability to assign permissions to others.

To configure a group or user's permissions click on the **+** icon next to the user or group's name. Check the appropriate permission boxes and click on **Apply** in the list to enable the permission.

Setting Item Visibility

In Workspaces you can set Featured Items. These items will be prominently displayed at the top of page. This allows you to make it easy for users to find the most important items as soon as they visit the Workspaces area. You can also choose to hide items from the Workspaces list of items.

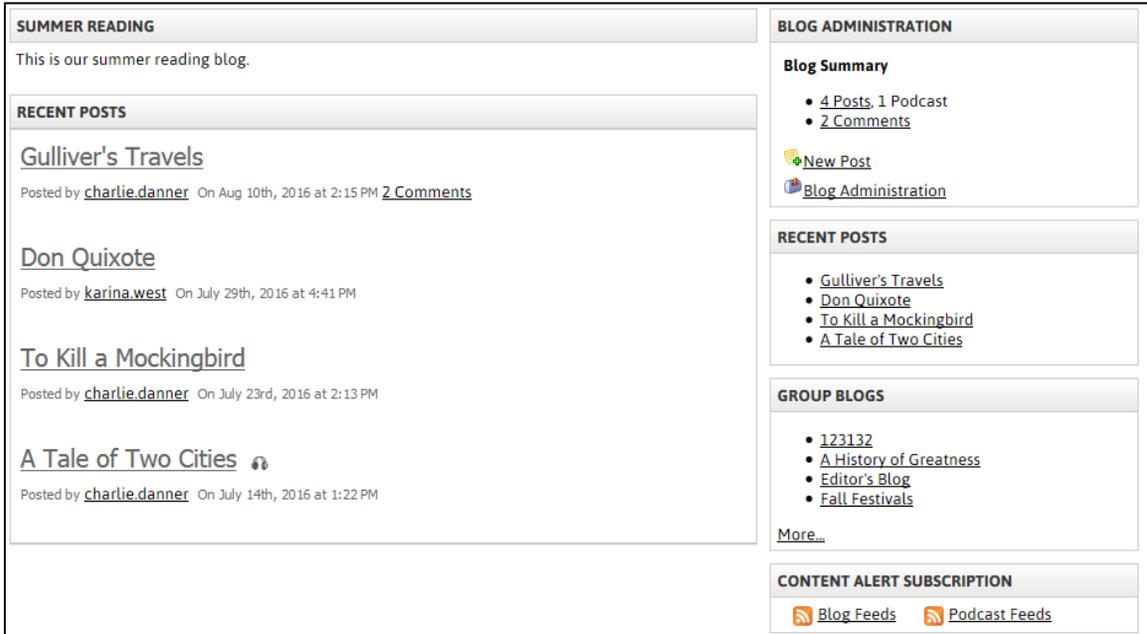


To control the appearance of your workspace items, click on the  icon.

You can now choose whether each item is a **Featured** item, a **Normal** item or a **Hidden** item.

Module: Blogs

Blogs are a great communication medium through which individuals can share information and receive feedback from an audience.



SUMMER READING
This is our summer reading blog.

RECENT POSTS

[Gulliver's Travels](#)
Posted by [charlie.danner](#) On Aug 10th, 2016 at 2:15 PM [2 Comments](#)

[Don Quixote](#)
Posted by [karina.west](#) On July 29th, 2016 at 4:41 PM

[To Kill a Mockingbird](#)
Posted by [charlie.danner](#) On July 23rd, 2016 at 2:13 PM

[A Tale of Two Cities](#) 
Posted by [charlie.danner](#) On July 14th, 2016 at 1:22 PM

BLOG ADMINISTRATION

Blog Summary

- [4 Posts](#), [1 Podcast](#)
- [2 Comments](#)

[New Post](#)
[Blog Administration](#)

RECENT POSTS

- [Gulliver's Travels](#)
- [Don Quixote](#)
- [To Kill a Mockingbird](#)
- [A Tale of Two Cities](#)

GROUP BLOGS

- [123132](#)
- [A History of Greatness](#)
- [Editor's Blog](#)
- [Fall Festivals](#)

[More...](#)

CONTENT ALERT SUBSCRIPTION

 [Blog Feeds](#)  [Podcast Feeds](#)

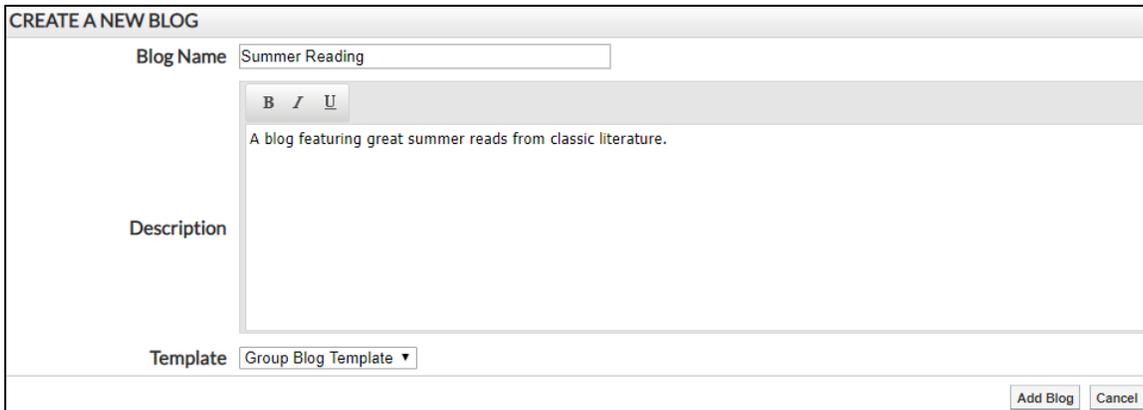
To add a blog, from the **Add New Item** drop-down select **Blog**.

Enter in the blog **Name**.

Fill in a **Description**.

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

Click **Add Blog** to create the new blog.



CREATE A NEW BLOG

Blog Name

Description

B I U

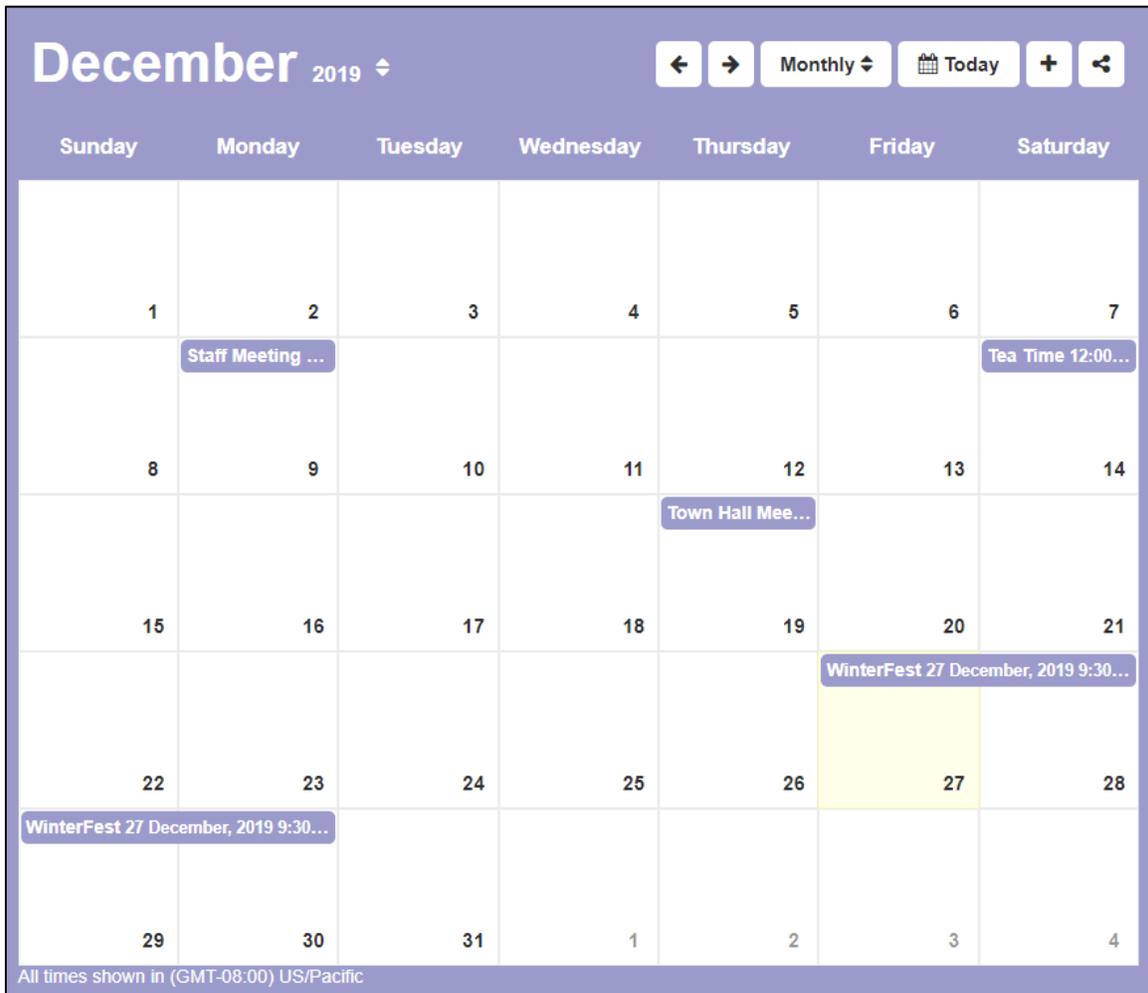
A blog featuring great summer reads from classic literature.

Template

To learn more about blogs please refer to the *Blog* guide.

Module: Calendars

Calendars are used to keep track of events that occur over a period of time.



To add a calendar, from the **Add New Item** drop-down menu select **Calendar**.

Fill in the following fields:

- **Name:** The name of your calendar.
- **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 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.

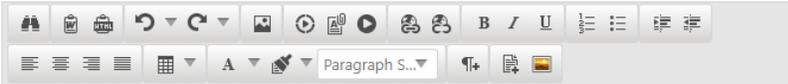
- **Merged Calendars:** Click on **Select calendars** to select other calendar(s) from your site or other sites on your domain.

NEW CALENDAR

Name

Color

Default View Monthly Grid View ▾



Description

Approval Require administrator approval to publish events

Calendar Owner

Default Filters

Name Description Categories

Location Color

Custom Filters

Merged Calendars

Click **Create Calendar** once you have finished configuring your calendar.

To learn more about the Calendars module please refer to the *Calendars* section.

Module: Custom Data Table

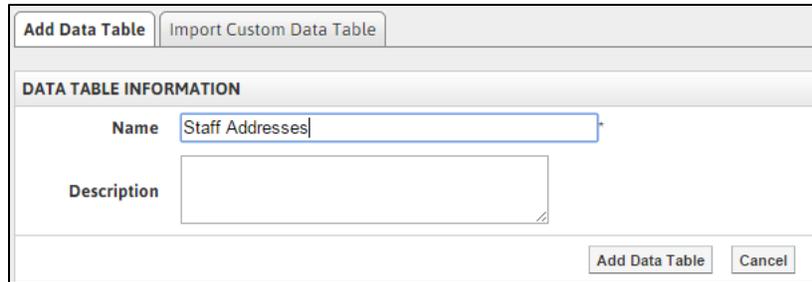
The Custom Data Table is available exclusively within Workspaces. You are able to use this feature to create and store things like an Address Book, Contact List, Book list, Inventory List or many other kinds of items that you would use in a database.

Data Management						
Table Information		Table Structure		List Display Layout		Security
FIND TEXT <input style="width: 150px;" type="text"/> <input type="button" value="Search"/> <input type="button" value="View All"/>						
STAFF ADDRESSES (1-2 OF 2) <input type="button" value="ADD RECORD"/>						
Name	Street Address	City	State	Country	Phone	Actions
1 Charlie Danner	812 Elm Avenue	Trenton	Utah	United States	555-234-5674	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2 Karina West	81 Oak Street	Springwood	New Mexico	United States	555-123-3151	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

To create a Customer Data Table, choose **Custom Data Table** from the **Add New Item** drop-down menu.

Type in the **Name** of the table.

Fill in the **Description**.



Click **Add Data Table**.

Another option to add a Custom Data Table to your workspace is by importing the data from an XML file. This can only be done when you are adding the table to your workspace.

Select **Custom Data Table** from the **Add New Item** drop-down menu.

Click on **Import Custom Data Table**.

 **Note:** Your file must be in XML format as specified in the **View Example File** which is located beside the **Choose File** button.

Click **Browse** and locate your XML file on your computer.

Click **Import Custom Data Table** to import your data.

Module: Evaluation

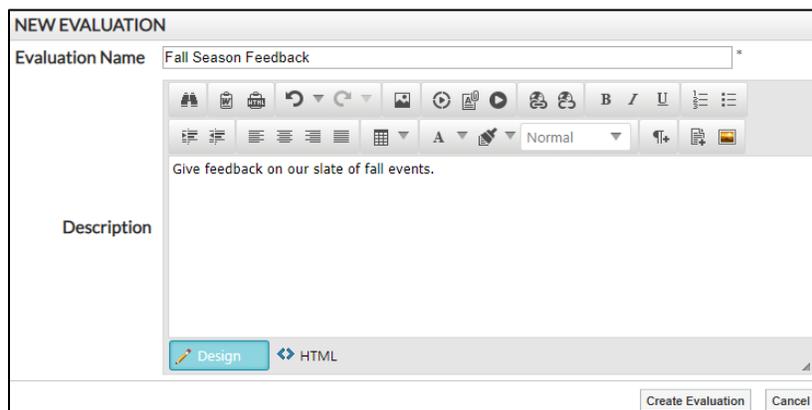
Users can add Evaluations to the workspace. These surveys can have different types of questions, including multiple choice questions, multiple selections questions and short answer questions.

Adding an Evaluation

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

Fill in the **Name** of the evaluation.

You can also add a **Description** to explain what the evaluation is about.



Click the **Create Evaluation** button.

Viewing an 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.
- **Export Survey Results:** This provides you a compilation of the results for your multiple choice, multiple selection and short answer questions.
- **Export Survey Summary:** This provides you a summary of the answers to multiple choice and multiple selection questions.
- **Import Survey:** This allows you to import survey questions from other surveys.
- **Chart:** This charts 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 set number of questions from your question pool.
- **Maximum Number of Times Survey May Be Taken:** This setting allows you to specify how many times a user can fill out a particular survey.
- **Rearrange:** This box allows you to specify the order the questions will appear when you click **Take Survey**.

 **Note:** If you choose to randomly sort or select your questions, the order the questions are in will not matter.

View Edit Security Activity

 **Survey:** Fall Season Feedback

Description

[Take Survey](#) | [Add Question](#) | [Survey Submission](#) | [Export Survey](#) | [Export Survey Results](#) | [Export Survey Summary](#) | [Import Survey](#) | [Chart](#)

Random Sort Questions | Random Select Questions | 1 | 1000 | Maximum Number of Times Survey May Be Taken

QUESTIONS

Name	Question Type	
 Which of our fall events did you attend?	Multiple Select	Edit Delete Details
 If you did not attend any of our fall events, why did you make that decision?	Multiple Choice	Edit Delete Details
 Are there any changes you would like to see to one or more of our annual fall events?	Short Answer	Edit Delete Details

REARRANGE

Which of our fall events did you attend?

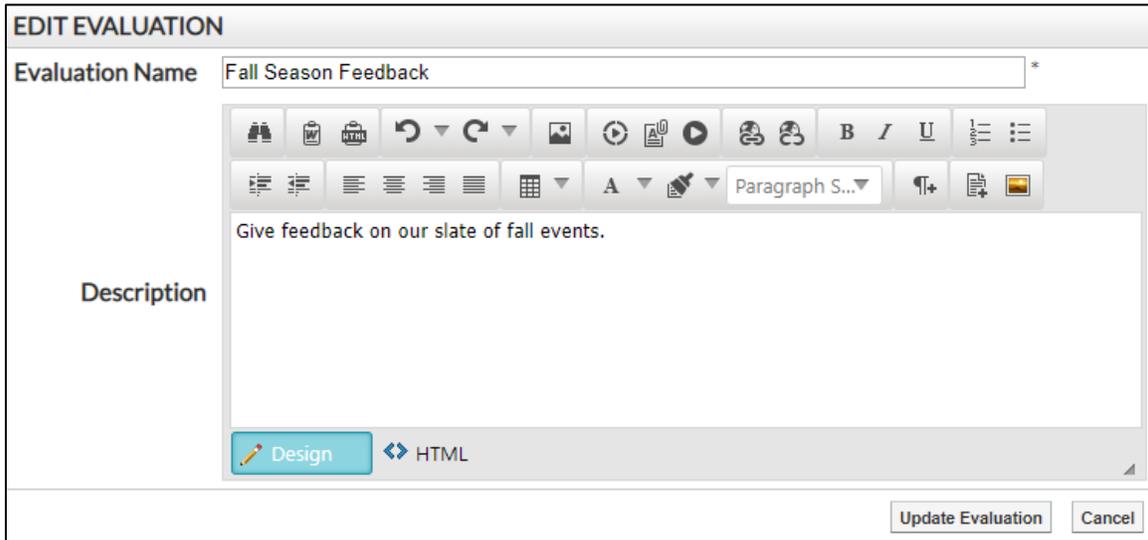
If you did not attend any of our fall events, why did you make that decision?

Are there any changes you would like to see to one or more of our annual fall events?

Editing an 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 view the evaluation.



EDIT EVALUATION

Evaluation Name:

Description:

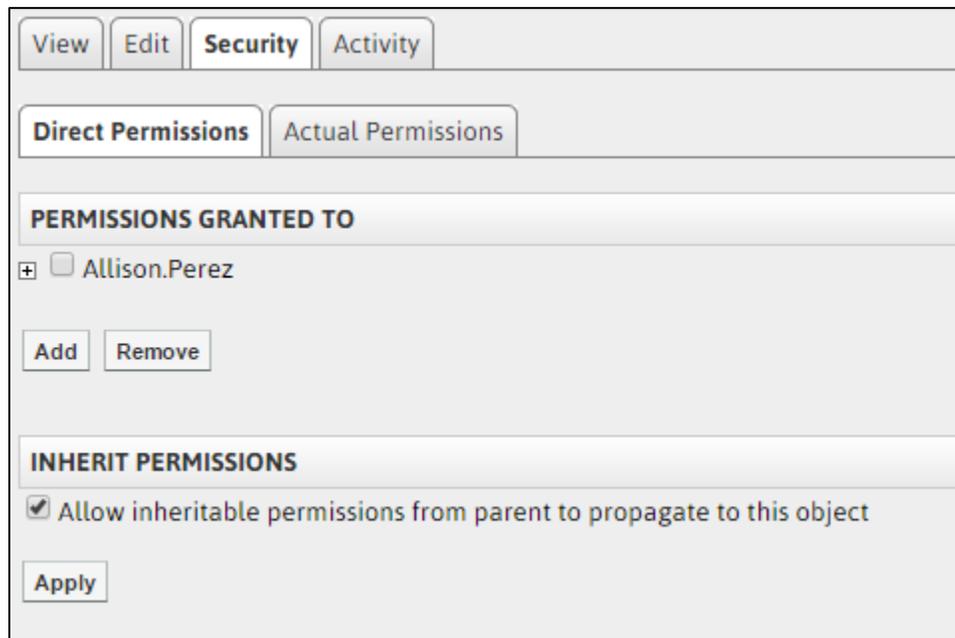
Design | HTML

Update Evaluation | Cancel

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

Security

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



View | Edit | **Security** | Activity

Direct Permissions | Actual Permissions

PERMISSIONS GRANTED TO

Allison.Perez

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**.

View	Edit	Security	Activity	
ACTIVITIES THAT HAVE OCCURRED ON THIS OBJECT (1-2 OF 2)				
Action Taken	Description	Occured At	User	Context
Updated	A user updated the properties on this object	18 November, 2015 10:41:48 AM	charlie.danner	Workspaces
Updated	A user updated the properties on this object	18 November, 2015 10:34:01 AM	karina.west	Workspaces
AVAILABLE ALERTS				
Content Item			Subscribe	
This alert will provide you with an update on changes to this file and its children.				
Content Item			Subscribe	
This alert will provide you with comments changes to this page.				

Take a Survey

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

Answer the questions provided.

Fall Season Feedback

1. Which of our fall events did you attend?

A. Franklin Lobster Fest

B. Fall BBQ

C. Free Movie Night

D. Halloween Hall

2. If you did not attend any of our fall events, why did you make that decision?

Events were too expensive

Events did not interest me

I did not hear about the event in advance

I was too busy

Other

3. Are there any changes you would like to see to one or more of our annual fall events?

More family events please.

Click the **Submit** button to submit the survey. If you do not wish to submit the evaluation, click the **Cancel** button.

Adding a Question

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

Select the **Question Type**:

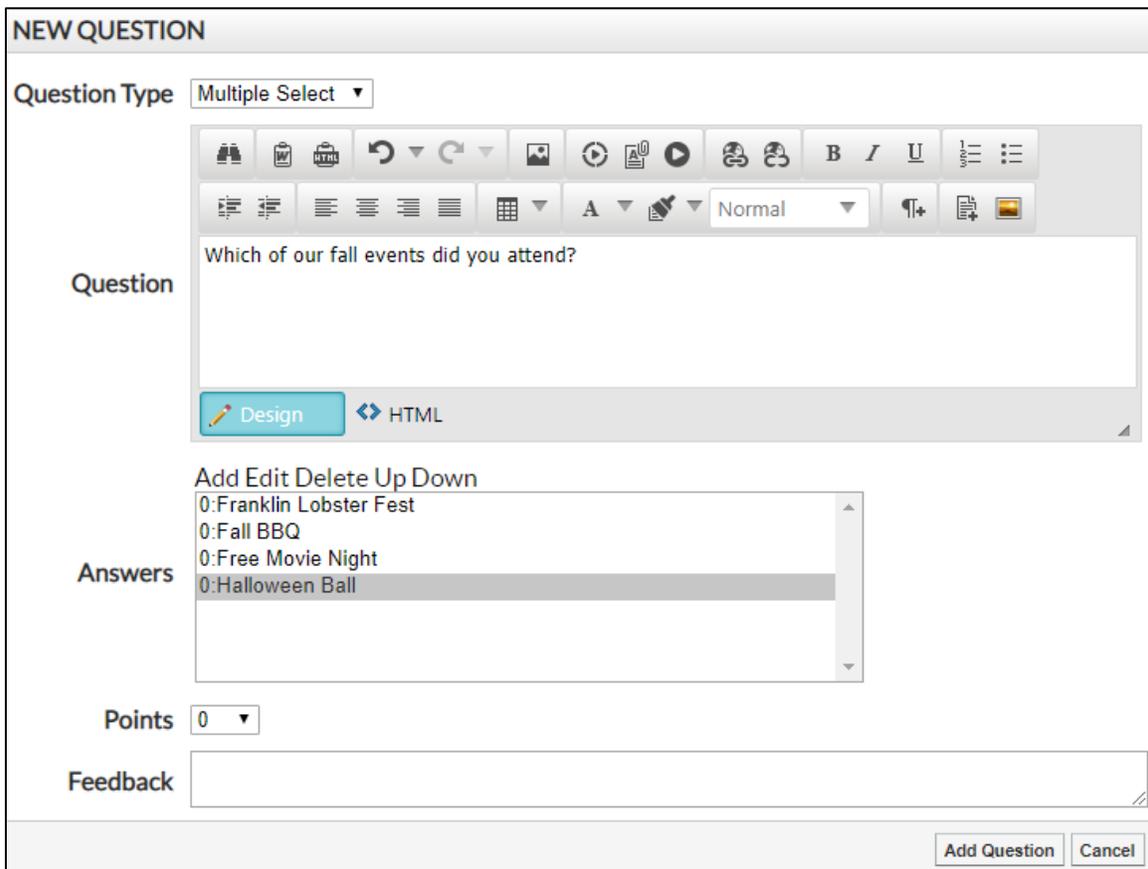
- **Multiple Choice**: This allows a user to select a single answer for the question.
- **Multiple Selection**: This provides checkboxes for the user to select.
- **Short Answer**: This provides a textbox for the user to type an answer in.

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 set to **0** for a survey.

If you wish, fill in the **Feedback** users will see after completing the question.



NEW QUESTION

Question Type: Multiple Select

Question: Which of our fall events did you attend?

Answers: Add Edit Delete Up Down
0:Franklin Lobster Fest
0:Fall BBQ
0:Free Movie Night
0:Halloween Ball

Points: 0

Feedback:

Add Question Cancel

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

Viewing Survey Results

To view all submissions to your evaluation, click on **Survey Submission** on the View Evaluation page.

ONLINE QUIZ SUBMISSION LIST						 EXPORT SUBMISSIONS
Submitted By	Submitted On	User Points	Ungraded Points	Survey Total Points	No. of Times	
<input checked="" type="checkbox"/> charlie.danner	17 November, 2015 02:55 PM	0	0	0	1	Delete
<input checked="" type="checkbox"/> charlie.danner	17 November, 2015 03:11 PM	0	0	0	2	Delete
<input checked="" type="checkbox"/> charlie.danner	17 November, 2015 03:23 PM	0	0	0	3	Delete
<input checked="" type="checkbox"/> charlie.danner	17 November, 2015 03:23 PM	0	0	0	4	Delete
<input checked="" type="checkbox"/> charlie.danner	17 November, 2015 03:23 PM	0	0	0	5	Delete
<input checked="" type="checkbox"/> charlie.danner	17 November, 2015 03:23 PM	0	0	0	6	Delete
<input checked="" type="checkbox"/> charlie.danner	17 November, 2015 03:24 PM	0	0	0	7	Delete
<input checked="" type="checkbox"/> charlie.danner	17 November, 2015 03:24 PM	0	0	0	8	Delete
<input checked="" type="checkbox"/> Allison.Perez	17 November, 2015 03:43 PM	0	0	0	1	Delete
<input checked="" type="checkbox"/> Bonnie.Klein	17 November, 2015 03:43 PM	0	0	0	1	Delete

To view each individual submission, click on the username under the **Submitted By** column.

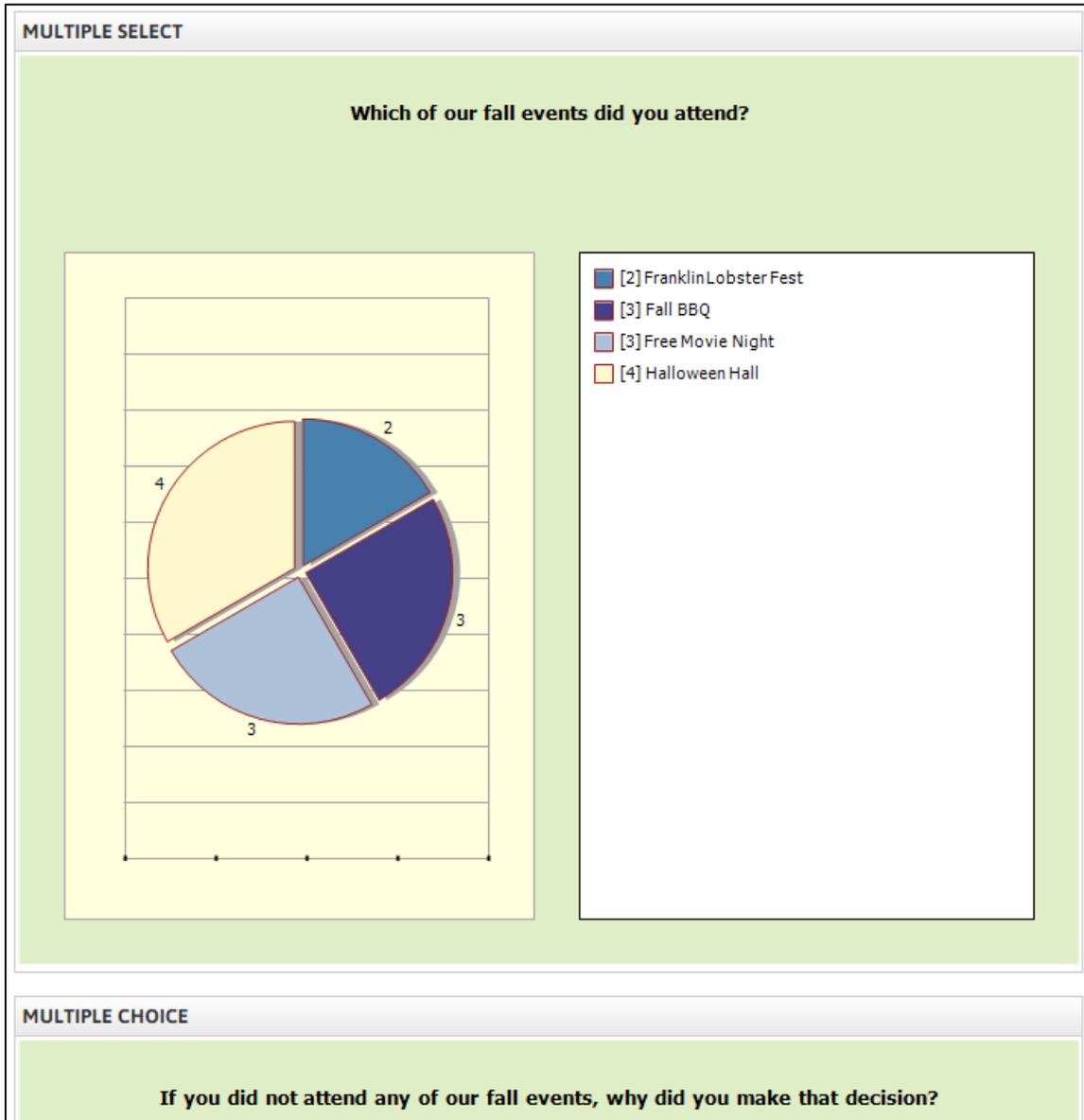
Survey Results and Summaries

You can download spreadsheets of your survey results by clicking on the **Export Survey Summary** or **Export Survey Results**.

	A	B	C	D	E	F
1	Fall Season	Feedback				
2						
3						
4						
5	Question: Which of		Total			
6	Option:	Franklin L	2			
7	Option:	Fall BBQ	4			
8	Option:	Free Mov	3			
9	Option:	Hallowee	4			
10						
11						
12	Question: If you did		why did y	Total		
13	Option:	Events we	2			
14	Option:	Events dic	1			
15	Option:	I did not h	4			
16	Option:	I was too b	1			
17	Option:	Other	0			
18						
19						

Submission Chart

To view a visual representation of your survey submissions, click on the **Chart** on the View Evaluation page.



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.

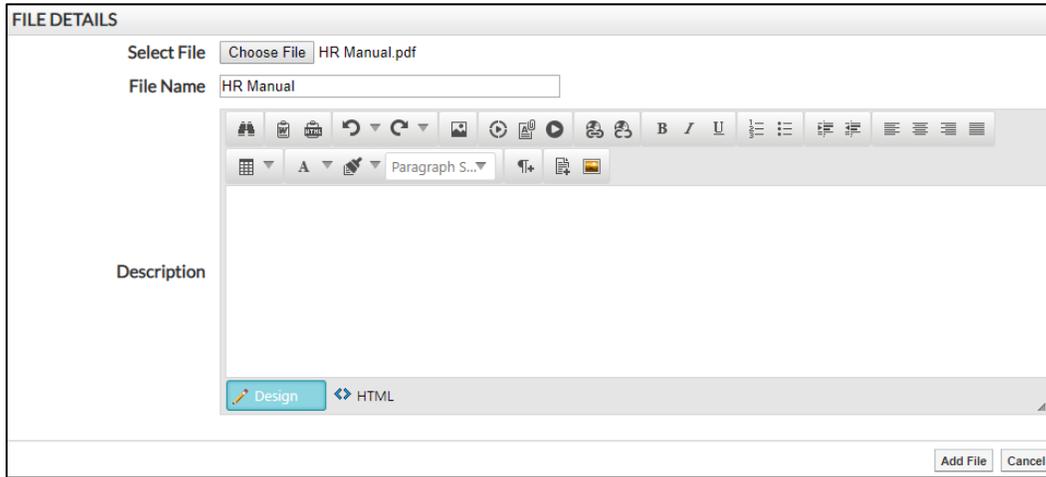
Adding a File

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

Fill in the required fields:

- **Select File:** Click **Choose File** to select the file you wish to upload.

- **File Name:** This is the name that will be used in the workspace. By default the name of the file will be in this field.
- **Description:** This description will be visible when you open the file.



Click the **Add File** button.

Managing a File

Once you click on a file you have uploaded, you will have the following options:

Viewing a File

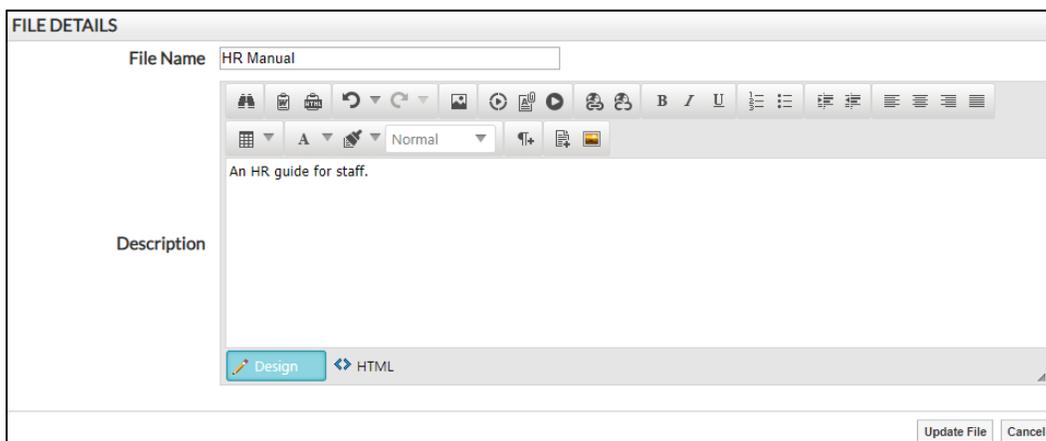
When a user clicks on a file, they are taken to the View File page. This section also displays any comments made on the file.

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

Click on the  icon to lock or unlock the file. A locked file cannot be edited.

Editing a File

The Edit File tab allows you to update the **File Name** and **Description** of the file.



To save any changes, click **Update File**.

All Versions

This tab 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.

ALL REVISIONS								+ADD NEW REVISION
Description	Size	Author	Created On	Version#	Live Version	Action		
 HR Manual	463 KB	trevor.mackay	20 November, 2015 03:14 PM	2	Yes			
 HR Manual	1.16 MB	charlie.danner	19 November, 2015 02:08 PM	1		Make Live	Delete	

By clicking **Make Live** you can make an older version of your file the live version.

Linked Resources

This tab allows you to link other resources that may be related to your document.

To add a file, use the **Choose File** button.

FILE DETAILS

Select File Building Permit.pdf

File Name

Rich text editor toolbar with icons for Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, and others.

Paragraph Style: Paragraph S...

Design

Description

LINKED RESOURCES

No Items Available

Actions...

Categories

The **Categories** tab allows you to place your resource file within one or more categories within your Knowledge Repository.

To select a category, click **Browse...**

Click on the Knowledge Repository domain you want and drill down to the category you wish to use and click **Select**.

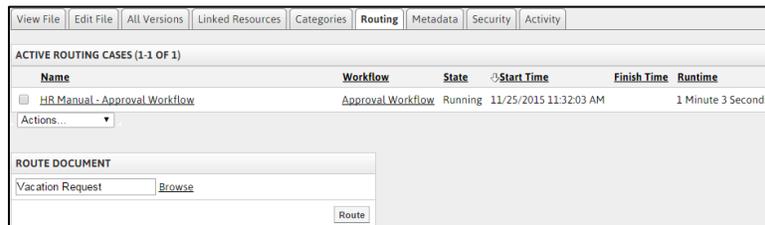
Click the **Add** button to add a category.



Routing

The **Routing** tab allows you to use the document to start a new workflow case for a given workflow.

To link a workflow to a document, click **Browse**. Then click on workflow you wish to use and click **Route**.



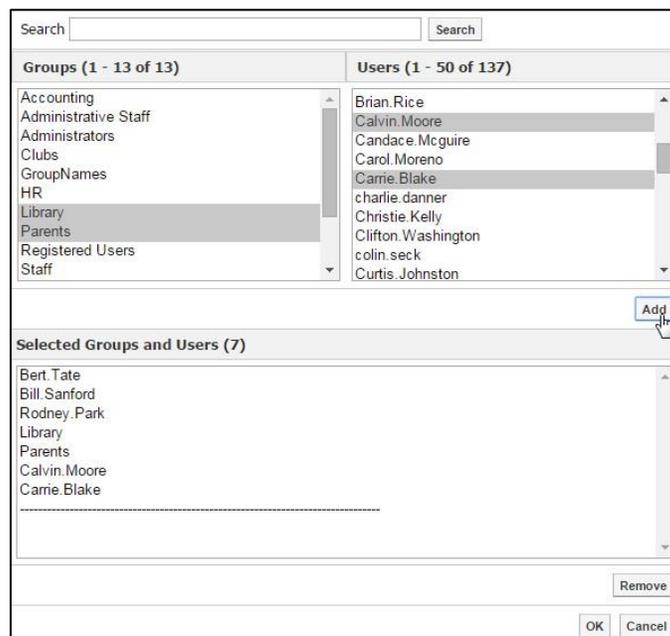
Metadata

The **Metadata** tab allows you to specify the **Author**, **Contributor**, **Publish Date** and other information about the resource. This allows the resource to be more easily found when users are searching for it.

Security

The **Security** tab allows you to control which users can view, edit or delete your file.

When selecting user permissions, it is important to keep in mind that there are two types of permission designations: **Direct Permissions** and **Actual Permissions**.

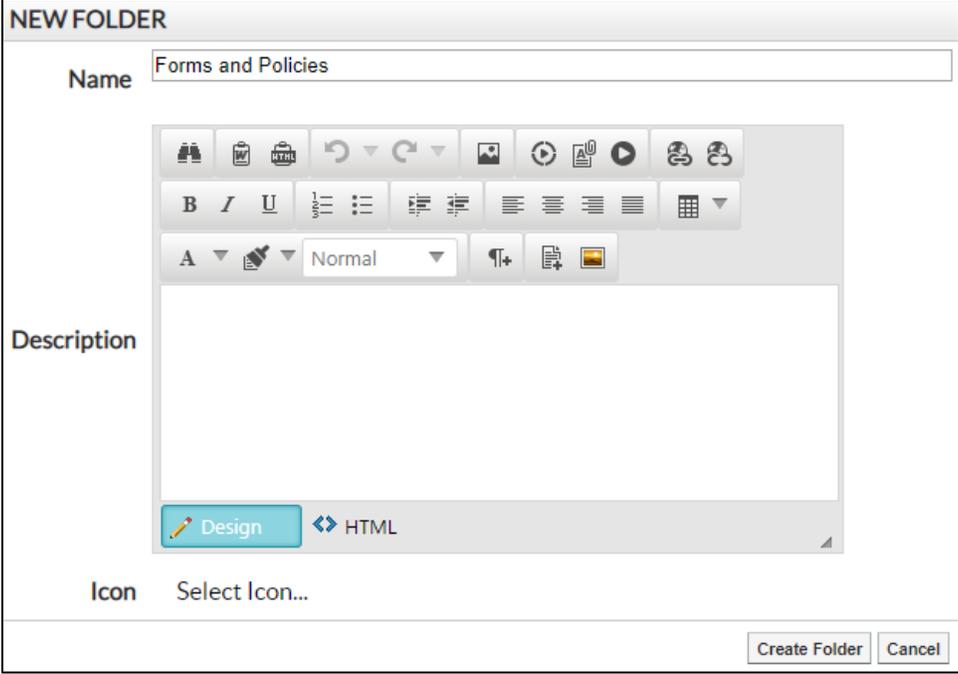


Module: Folder

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.
- **Icon:** You can use **Select Icon...** to control the icon that appears beside the folder.



NEW FOLDER

Name

Description

Icon

Click the **Create Folder** button.

Module: Forums

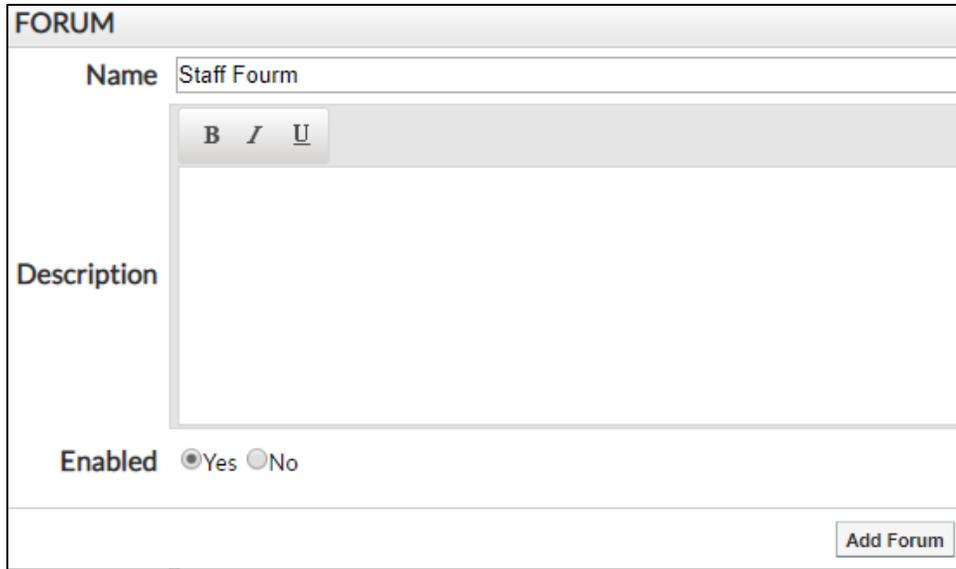
The forum is an excellent tool for conducting quick and detailed discussions on various topics with many individuals participating at once. Here you can establish course topics for you to collaborate on, provide sections for discussion, or simply answer questions all in an organized environment.

To create 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.

To learn more about Forums please refer to the *Forums* guide.

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.

To add a gallery, select **Gallery** from the **Add New Item** drop-down menu.

Enter in the **Name**.

Fill in the **Description**.



Click **Create** to create your gallery.

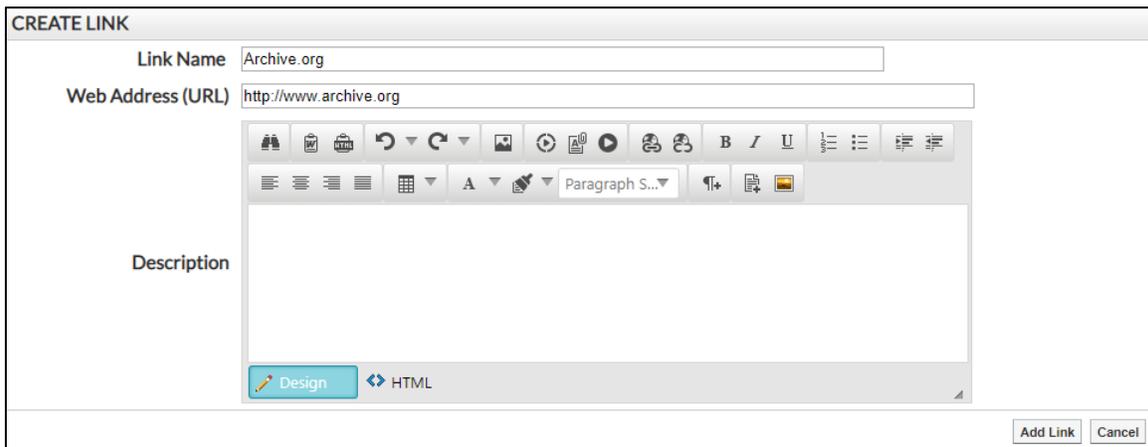
Module: Links

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 a 'CREATE LINK' dialog box. It has two input fields: 'Link Name' with the value 'Archive.org' and 'Web Address (URL)' with the value 'http://www.archive.org'. Below these is a rich text editor with a toolbar containing icons for undo, redo, insert image, insert video, bold, italic, underline, list, and link. The text area is currently empty. At the bottom of the dialog, there are two buttons: 'Add Link' and 'Cancel'.

Click the **Add Link** button.

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 select **Other** and 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.

POLL DETAILS

Name

Question

B I U

What date should we choose for our staff party?

Answer Options

- April 2nd ✖
- April 9th ✖
- April 16th ✖
- April 23rd ✖
- April 30th ✖

Allow multiple answers

Randomize answer order

Allow user to enter own answers

Display Options

Submit Button Text

Results

- Show results to voters
- Percentage only
- Hide all results

Chart Type

- Bar chart
- Pie chart

Additional Options

Security Measure Enforce security measure (CAPTCHA) on Guest users

Repeat Voters

- Allow repeat Guest voters
- Block Guest voters by cookie
- Block Guest voters by cookie and IP address

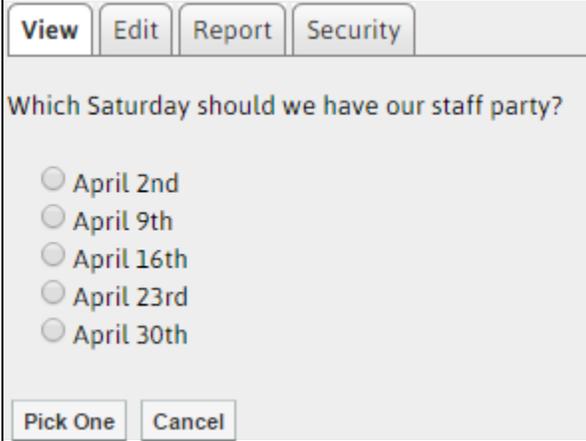
Expiry

Deadline :

Click the **Add 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.



Edit Vote

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

Click **Update Poll** to save your changes.

Report

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 each option has received.

Security

The **Security** tab will allow you to configure who can view (and vote) in the poll, who can edit the poll and who can delete the poll.

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.

To create a workflow, select **Workflow** from the **Add New Item** drop-down menu.

Fill in the **Name**.

Enter a **Description**.

NEW WORKFLOW

Name

Description



A workflow that empowers our HR team to track and approve vacation requests.

Click on **Create**.

To learn more about Workflow please refer to the *Workflow* guide.