

April 17, 2012

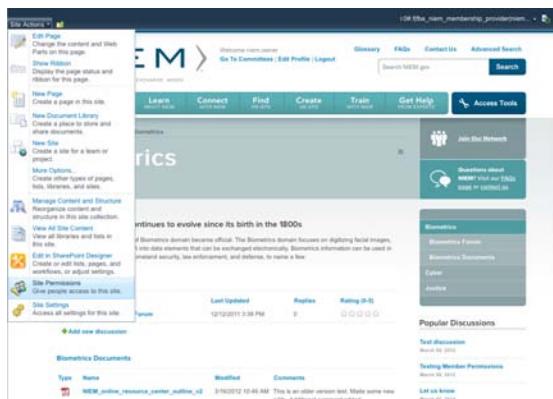
NIEM.gov

SHAREPOINT USER GUIDE FOR COLLABORATION ZONE ADMINS

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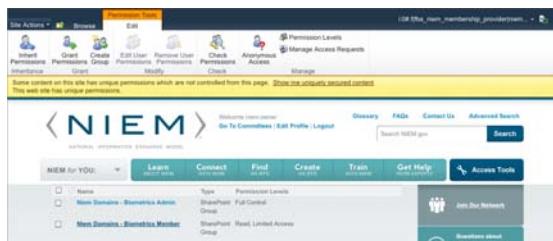
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1. MANAGE PERMISSIONS



You can assign a member to one or more groups to grant the user group permissions.

1. Start from your collaboration zone page and select **Site Actions/Site Permissions** to view your permissions.

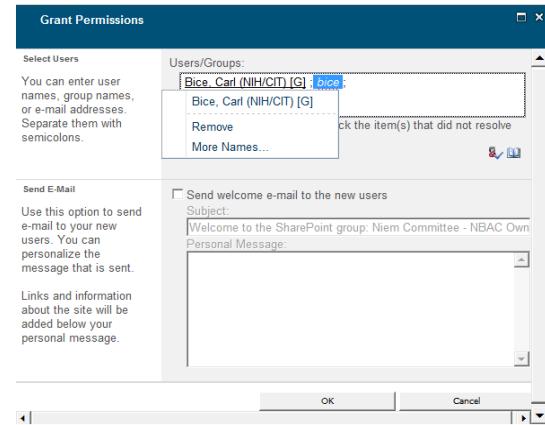


2. Click on the desired group (e.g. Biometrics Admin or Biometrics Member) to display a list of current members. Note the different permission level assigned to an admin and a member and select the appropriate group.



3. Steps to add member(s) to this group (e.g. Biometrics Member) are as follows:

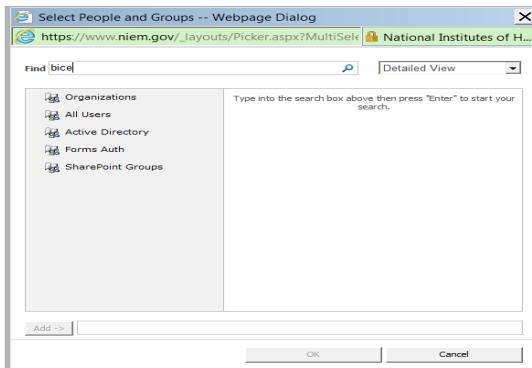
- a. Select **New/Add Users**.



- b. In the **Grant Permissions** dialog box, enter user information in the **Users/Groups** text area.

(optional) Click on “Send a welcome e-mail to the new users” and add a personal message.

- c. To confirm valid user names, select the **Check Names** icon. To search for valid users, select the **Directory** icon. All valid users will come from the **Forms Authentication** directory.



- d. **Helpful hint:** If user(s) can't be found in the **Forms Authentication** directory, request user(s) to register with the NIEM website and provide you their user name and email so you can locate their name in the **Forms Authentication** directory once they have registered.

4. Steps to remove member(s) from the group are as follows:

- Select the checkbox to the left of the user **Name(s)**.
- Under **Actions**, select **Remove Users from Group**.

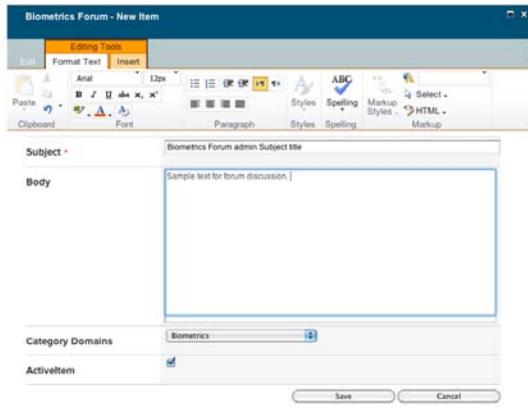
2. COLLABORATION ZONE FORUM AND DOCUMENTS

For each Collaboration Zone, there resides a private/members only “[CZ Name] Forum” and “[CZ Name] Documents” folder where members can have threaded discussions and/or share/review documents.

Collaboration Zones that are domains (Biometrics – Screening), the **admin** has the option to delete any forum posts and document uploads. The domain members can freely participate within the forum or upload documents, and check out or edit files but cannot delete once uploaded (a safeguard to prevent accidental deletion by other members).

For Collaboration Zones that are committees and other groups (e.g. PMO, NBAC, Canada COE, NAD Public Health) **both the admins and members** of the Collaboration Zones have the option to delete the forum post and uploaded documents/images, **so take extra precaution** before deleting an item.

Using the Collaboration Zone “Biometrics” as an example, just click on “**Add new discussion**” or “**Add document**” from the Collaboration Zone’s landing page. Fill in the proper fields.



Collaboration Zone Forum

For a new discussion: Click on “**Add new discussion**,” fill out all fields (**Subject**, **Body**, **Category Domains** (select the appropriate domain), check **ActivelItem**, and click **Save**. The admin “New Item” dialogue box gives more formatting choices within the **Body** text area. Members don’t have this option.

Note: For committee Collaboration Zones, it would be **Category Committee** (select the appropriate committee). For audience Collaboration Zones, it would be **Category Audience** (select the appropriate audience).

Categories support classification of content to aid in searching and filtering.

In the near future, multi-selection of domains, committees, groups, or audience will be possible.



To reply to an existing thread: Click the subject title and then click on **Reply**. As an admin, the subject, category, and **ActivelItem** should all be pre-filled from the existing thread, just add your response in the **Body** field. **To make edits to the existing thread:** click on **View Properties** instead of **Reply**.

CZ Admins can edit and delete any thread, members can only reply or add a new discussion.

Note: NIEM.gov provides a “**General Forum**” (located in the **Connect with NIEM** landing page). All registered members are able to participate in this **General Forum**. Anonymous or non-registered users can only read the posted discussions.

In addition, NIEM.gov provides private forums for each of the Collaboration Zones (domains, committees, and groups) where only members can view and create a new discussion thread or reply to an existing thread.

Collaboration Zone Documents

After clicking “**Add document**” the **Upload Document** dialogue box appears. **Browse/select** the document or image. Click on “Add as a new version to existing files,” add version comments (if necessary), and click **Submit** or **Cancel**.

Helpful hint: By checking “Add as a new version to existing files,” this allows the file to be updated/replaced by a file with the same name.

After clicking “**Submit**” the “Document Info” dialogue box appears, fill out fields (**Title**, **Article Date**, **Comments**, check **ActiveItem**, and click **Save**).

Helpful hint: For CZ admins only, everyone in your CZ is able to view as soon as you complete the **Add document** process. They are able to check out your document and edit properties, they just don’t have permission to delete. If you need to make edits to your uploaded file, **Check Out** and then follow the **Check In** process so others can access.

For CZ members: At this point, you are the only person able to view the added document. Go to your added document and hover over the name, click on the small triangle that appeared, and select **Check In**.

In the **Check in** dialogue box, select the version type, minor (draft) or major (publish). If you select, the **Major version (publish)** everyone in your CZ will have access to the uploaded document. If you select the **Minor version (draft)**, only your admins.

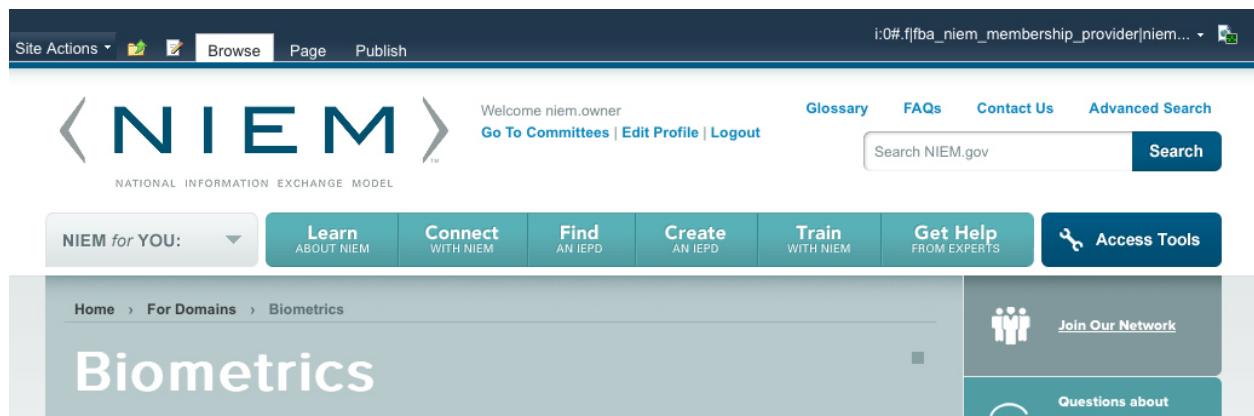
Select **Yes** or **No** to the **Retain Check Out** question, choose **No** if you have finished editing, add any comment change. Click **OK**.

Helpful hint: Contact your admin(s) if you would like a review or an approval of the draft version prior to publishing.

3. GENERAL PAGE EDITING

To edit pages or create/delete new pages of a particular Collaboration Zone (CZ), you have to be a part of that admin group (e.g. Biometrics Admin) and logged-in. **Note:** There is no limit on how many Collaboration Zones you can participate in as an admin but an existing CZ Admin must grant permission or access. In contrast, to become a registered member of any Collaboration Zone, an automated approval process is in place (**currently not working**). The registered member can only view, participate in their forum, and upload documents/images.

As an admin, you have several ways to navigate. Using the blue ribbon area, choose **Site Actions** and select the desired drop menu item function **and/or** use the applicable short-cut items to the right of **Site Actions**.



To manage most content, perform the following steps.

1. First navigate to your CZ, log-in if you haven't already done so, and select **Site Actions/Manage Content and Structure**. It will only show that particular subsite you wish to edit. If you are an admin for another CZ, then you will have to navigate to that landing page and then select **Site Actions/Manage Content and Structure** to make edits to that CZ. **Helpful hint:** On the right menu items, it will display all your Collaboration Zones that you belong to (either as an admin or member) for easier navigation.
2. Within the desired CZ, select **Pages**. This will display a list of all available pages on the right. Any new page will be saved here. Within any CZ, the CZ "landing" page is designated by **(default)**. The designated **default** page cannot be deleted, however, any new page created can be deleted. Click on the page to be edited (i.e. biometrics(default) is shown below).

A screenshot of the 'Site Settings > Site Content and Structure' page for the BIOMETRICS site. The left navigation pane shows a tree structure with 'Biometrics' expanded, showing 'Biometrics Documents', 'Biometrics Forum', 'Images', and 'Pages' (which is highlighted in orange). The main content area shows a table of 'Pages - All Documents' with one item listed:

Type	Name	Modified	Modified By	Checked Out To	Contact	Page Layout
Page	biometrics(default)	4/2/2012 2:19 PM	i:0#.f fba_niem_membership_provider niem.owner		Hunt, Christopher (NIH/CIT) [G]	General Landing Page

The status bar at the bottom of the browser window shows the URL 'i:0#.f|fba_niem_membership_provider|niem...' and a refresh icon.

3. Next, under the blue ribbon, a yellow status statement will appear. It will notify you if the file is **Checked In** and viewable by authorized users (other admins in your CZ) and ready to edit or check out. If someone else has the page/file checked out, you will get a warning asking if you want to override the other **Check Out** and that you are viewing a **draft** version. **Be sure to confirm with the other admin user before you override.** They may be in the process of making edits or had forgotten to check the file back in. Therefore, it's **extremely important to remember to check the file back in** after saving changes or editing a page. Multiple admins can view the same page simultaneously, however, the first admin to **Check Out** the page has right-of-way and their changes will be reflected when they **Check In**. Anyone else will be viewing the draft page prior to the last checkout. **The draft page is recommended for viewing only** and any edits should wait until the checked out file has been checked in or published to avoid version confusion.

The check in process allows other authorized admins to view the changes prior to publishing. When the file has been **Checked In**, any authorized admin can **Publish** afterwards. Once published, it is visible to all authorized members.

A screenshot of a SharePoint site's ribbon. The 'Site Actions' dropdown is open, showing options like 'Edit Page' (which is highlighted with a yellow background), 'New Page', 'New Document Library', 'New Site', 'More Options...', 'Manage Content and Structure', 'View All Site Content', 'Edit in SharePoint Designer', 'Site Permissions', and 'Site Settings'. Above the ribbon, a yellow status bar says 'Status: Checked in and viewable by authorized users.' The main content area shows the NIEM logo and navigation links.

4. Select **Edit Page** under **Site Actions** or select the “edit” icon (second icon next to the **Site Actions**) in the blue ribbon short-cut area and you are ready to make edits.

A screenshot of a SharePoint site's ribbon. The 'Site Actions' dropdown is open, showing options like 'Edit Page' (which is highlighted with a yellow background), 'New Page', 'New Document Library', 'New Site', 'More Options...', 'Manage Content and Structure', 'View All Site Content', 'Edit in SharePoint Designer', 'Site Permissions', and 'Site Settings'. Above the ribbon, a yellow status bar says 'Status: Checked in and viewable by authorized users.' The main content area shows the NIEM logo and navigation links. Below the navigation, there's a 'Biometrics' section with text about the domain's evolution and its focus on digitizing facial images and DNA. On the right side, there are 'Access Tools' like 'Learn ABOUT NIEM', 'Connect WITH NIEM', 'Find AN IEPD', 'Create AN IEPD', 'Train WITH NIEM', 'Get Help FROM EXPERTS', 'Join Our Network', and a 'Questions about NIEM?' link. At the bottom, there's a forum post table and a sidebar with links to 'Biometrics', 'Biometrics Forum', 'Biometrics Documents', 'Cyber', and 'Justice'.

5. Most edits will take place in the **Page Content** field. Start by click in the **Page Content** field to make it active. The content should have existing formatting in place, you can simply highlight or insert the desired text area, type changes and/or delete.

The **Page Intro** is a pre-formatted text field that can be used (optional). Use text only format or type directly in the text field. **Helpful hint:** This was used on a limited basis throughout the site.

There are a number of options using the **Format Text** selections, however, it's strongly recommended not to stray from the established NIEM brand. If requested, a PDF of the NIEM Branding guidelines can be provided as well as access to the Communications Toolkit.

Options are available to format text, bullets, numbers, alignment, etc..., even stylized options like bold or italicize. Also, the **Markup Styles** dropdown list can be used to apply appropriate formatting by selecting pre-existing tags like headline (h2) and body text (paragraph).

Helpful hint: Use the text-only (plain text) format, don't cut and paste directly from Microsoft Word because it will add extraneous HTML and clutter the code. Use Word to convert as a plain text file using **Save As** and then cut and paste from there. Keep the text-only (plain text) file open and use as an intermediate cut and paste working area. Also, the text-only (plain text) format will automatically format to the body text (paragraph). **In general, use NIEM approved fonts, colors, sizes, and avoid the text highlight color.**

6. Steps for inserting/changing a hyperlink. In the **Page Content** field, highlight desired hyperlink, select **Editing Tools** click on **Insert**. Click on **Link** (on the small triangle) and select either **From SharePoint** (internal address) or **From Address** (external address).

If **From SharePoint** is selected a **Select an Asset** dialogue box appears. Navigate to the appropriate item or page and click **OK**. It's critical to have the correct URL path. **Save and Close** to review and test your link and **Check In** for other admins in the CZ to view and **Publish** for members to view. You can modify the created link by highlighting the link in the **Page Content** field. Click on the newly appearing **Link Tools Format** menu where there are more available options.

If **From Address** is selected, 2 text fields in the **Insert Hyperlink** dialogue box need to be filled.

1. **Text to display** field: edit text or leave as is if correct. 2. **Address** field: type the full URL. Click **OK**. Check **Open in new tab**. If it's an image or document, then in the **Description** field, type in a brief description (alt tag) and select **Display Icon**.

Click on the **Save and Close** icon (short-cut menu item) to review. **Check In** and **Publish** if page is complete.

Inserting/changing a picture isn't recommended unless you have a comfortable working knowledge manipulating HTML and image software. The **Page Image** and **Page Content** areas can be used to insert a picture and can be modified using **Picture Tools**.

7. If you have a comfortable working knowledge manipulating HTML, you can access the HTML code by first clicking in the desired editing field such as **Page Content** and then select **HTML** and then **Markup Edit HTML Source**.
8. **Warning: Do not edit the Add a Web Part area.** This web part affects the domain forums and documents.

Editing Tools

Site Actions | Save & Close | Check In | Paste | Undo | Edit | Clipboard | Font | Paragraph | Styles | Spelling | Markup | Styles | Spelling | Markup

Status: Checked out and editable.

National Information Exchange Model (NIEM)

Welcome keyo2 | Go To Committees | Edit Profile | Logout | Search NIEM.gov | Search

NIEM for YOU: Learn ABOUT NIEM | Connect WITH NIEM | Find AN IEPD | Create AN IEPD | Train WITH NIEM | Get Help FROM EXPERTS | Access Tools

Title: Biometrics

Page Image: Click here to insert a picture from SharePoint.

Rollup Image: Click here to insert a picture from SharePoint.

Image Caption: [Text area]

Page Intro: Click here to add new content.

Page Content:

The biometrics field continues to evolve since its birth in the 1800s

On February 14, 2011, the NIEM Biometrics domain became official. The Biometrics domain focuses on digitizing facial images, fingerprints, iris scans, and DNA into data elements that can be exchanged electronically. Biometrics information can be used in different capacities, including homeland security, law enforcement, and defense, to name a few.

Header Zone: Add a Web Part

Biometrics Forum:

Subject	Last Updated	Replies	Rating (0-5)
Biometric Forum test3 from member	3/20/2012 6:22 PM	0	☆☆☆☆☆
Another Biometrics Forum test2	3/20/2012 4:34 PM	0	☆☆☆☆☆
Testing Biometric Domain Forum	12/12/2011 3:38 PM	0	☆☆☆☆☆

[Add new discussion](#)

Biometrics Documents:

Type	Name	Modified	Comments
Image	Biometrics_MCandS	3/19/2012 3:32 PM	screen capture jpeg test
Image	niem-ndr-1_AdobePDF	12/12/2011 1:08 PM	testing

[Add document](#)

Popular Discussions:

- Biometric Forum test3 from member (March 20, 2012)
- Another Biometrics Forum test2 (March 20, 2012)
- PMO member forum discussion test (March 20, 2012)
- NIEM member forum discussion (March 20, 2012)

Spotlight:

Abracadabra. See the Magic of NIEM! Watch our newest video starring Donna Roy, NIEM Executive Director.

Editing Tools

Site Actions | Save & Close | Check In | Paste | Undo | Edit | Clipboard | Font | Paragraph | Styles | Spelling | Markup | Styles | Spelling | Markup

Status: Checked out and editable.

Editing Tools

Site Actions | Save & Close | Check In | Paste | Undo | Edit | Clipboard | Font | Paragraph | Styles | Spelling | Markup | Styles | Spelling | Markup

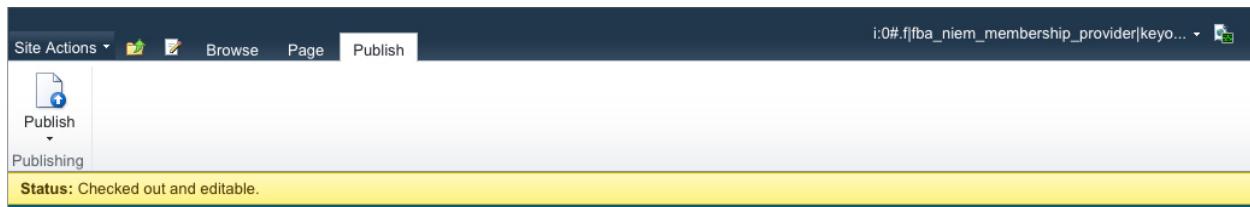
Link Tools

Site Actions | Save & Close | Check In | Paste | Undo | Edit | Clipboard | Font | Paragraph | Styles | Spelling | Markup | Styles | Spelling | Markup

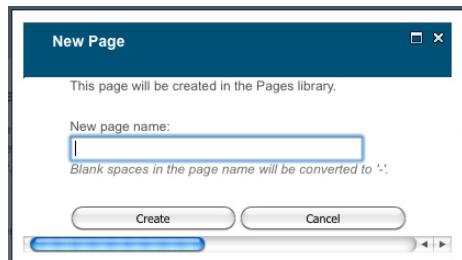
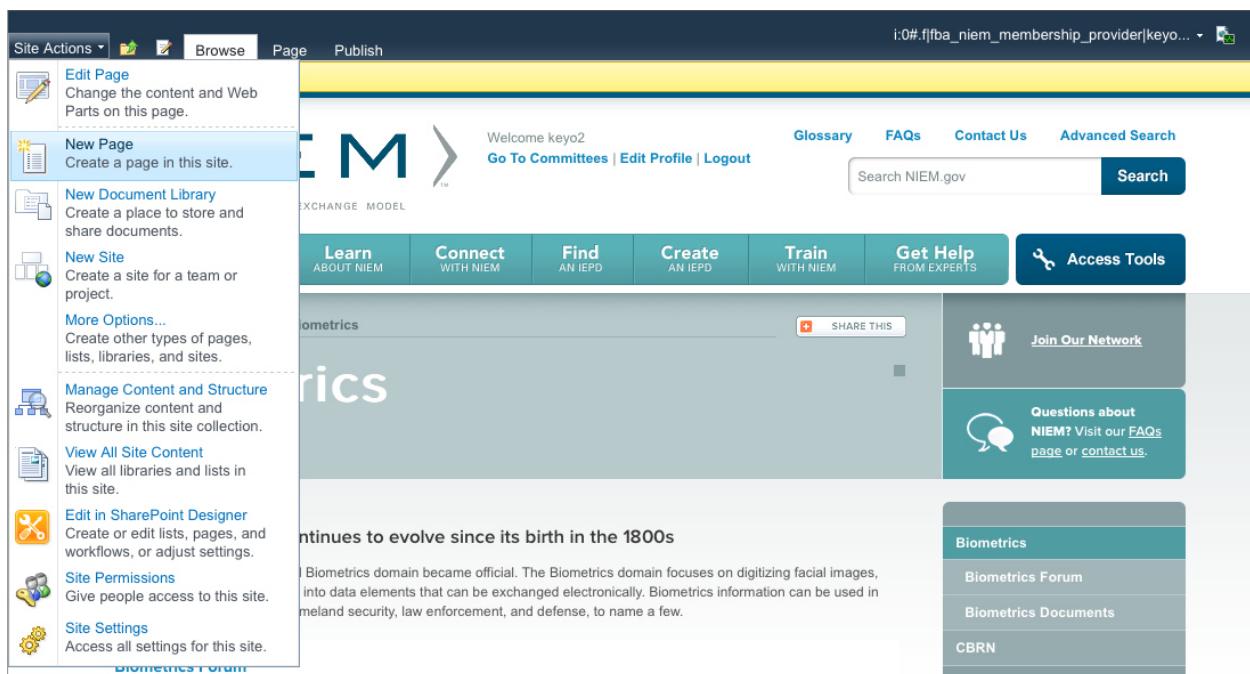
URL: http://www.lmdagency.c | Open in new tab | Display Icon

Select Link | Remove Link | Description: | Bookmark: | Properties | Behavior

- When changes have been completed, select **Save & Close**. Review your edits for accuracy and if the page is ready to be reviewed by other admins, select **Page**, and then **Check In**. Otherwise, use the short-cut menu item **Publish**, add desired comments (such as a major change), and then select **Continue**. Once the page is published, it is viewable to all members. You can unpublish by simply going through the same publishing steps and select **Unpublish**. It toggles back and forth depending on the last action.



To create a new page within your site: Start from your Collaboration Zone page and select **Site Actions/New Page**.



Type in the “New Page Name.” Choose a brief but descriptive name. It will automatically create a URL path. The page name is the title of the page. Select “Create.”

Locate your new page in the **Pages** section. Open or edit by following the **General Editing** procedures.

For more options in creating a new page, select Site Actions/Manage Content and Structure. Select Pages within your Domain or Collaboration Zone. Select New/Page and then OK.

The screenshot shows the SharePoint 'Site Settings' interface under 'Site Content and Structure'. On the left, a navigation tree includes 'Home', 'Biometrics' (selected), and 'Pages' (highlighted). The main area displays a list of 'Pages - All Documents' with two items: 'biometrics-test2-page' and 'biometrics-test-format-testing'. The 'biometrics-test2-page' item has a yellow border around its name, indicating it is selected. The top navigation bar includes 'Actions' (with 'New') and 'Settings'.

Type the title of the page, add a description (optional), URL Name (will be generated automatically or manually edit after it's generated. Select the **Page Layout** type. Choose either **(General Page) Body Only with Webpart Zones** or **(General Page) General Landing Page**. Select Create.

The screenshot shows the NIEM SharePoint site with a 'Create' dialog open. The dialog has fields for 'Title' (set to 'biometrics test1 page'), 'Description' (empty), and 'URL Name' (set to '/Pages/biometrics-test1-page.aspx'). Below these, the 'Page Layout' section is expanded, showing options like '(General Page) Faq Default Display' and '(General Page) Body Only with Webpart Zones' (which is selected). At the bottom of the dialog are buttons for 'Check Spelling', 'Create', and 'Cancel'.

Helpful hint: The **General Landing Page** layout should be used if images are needed. If necessary, you can change between the two layout types later. **Here's how:** Navigate to your Collaboration Zone where you have admin permission and where the new page exists. Go to **Site Actions/Manage Content and Structure**, click on **Pages**, locate the page name (where the layout type change is desired), hover over it and click on the small triangle. Select **Edit Page Settings**.

The screenshot shows the SharePoint 'Site Settings > Site Content and Structure' page. On the left, there's a navigation tree with categories like Home, Biometrics, etc. The main area shows a list of pages. A context menu is open over the page titled 'biometrics-test1-page'. The menu items include 'Open Link in New Window', 'Delete', 'Copy...', 'Move...', 'Edit Page Settings' (which is highlighted in yellow), 'View Properties', 'Manage Permissions', 'Version History', 'Check Out', and 'Publish'.

In **Page Layout**, select the desired option change, in this example, (**General Page**) **General Landing Page**, also take notice of the other items that are editable in this view.

The screenshot shows the 'Edit Page Settings' dialog for the page 'biometrics-test1-page'. The dialog is divided into several sections:

- Page Title and Description**: Fields for URL Name (Pages/biometrics-test1-page.aspx), Title (Biometrics test1 page), and Description.
- Page Layout**: A dropdown menu set to '(General Page) General Landing Page'. Below it is a diagram of a page layout with a dashed border.
- Audience Targeting**: A text input field.
- Page Contact**: Options to 'Select Contact' (radio button selected, contact name 'keyo2' entered) or 'Enter contact information' (radio button unselected, contact name and E-mail address fields available).

On the right side of the dialog, there's a sidebar with the following sections:

- Join Our Network**
- Questions about NIEM?**: Visit our [FAQs](#) page or [contact us](#).
- Biometrics**
- Popular Discussions**:
 - Health Forum test 2 (April 10, 2012)
 - test post (April 10, 2012)
 - Biometric Forum test3 from member (March 20, 2012)
 - Another Biometrics Forum test2 (March 20, 2012)
- Spotlight**: An item titled 'Abracadabra. See the Magic of NIEM!' with a video thumbnail and a link to watch the newest video starring Donna Roy, NIEM Executive Director.

After the new page is created, there are 3 options for accessing the new page.

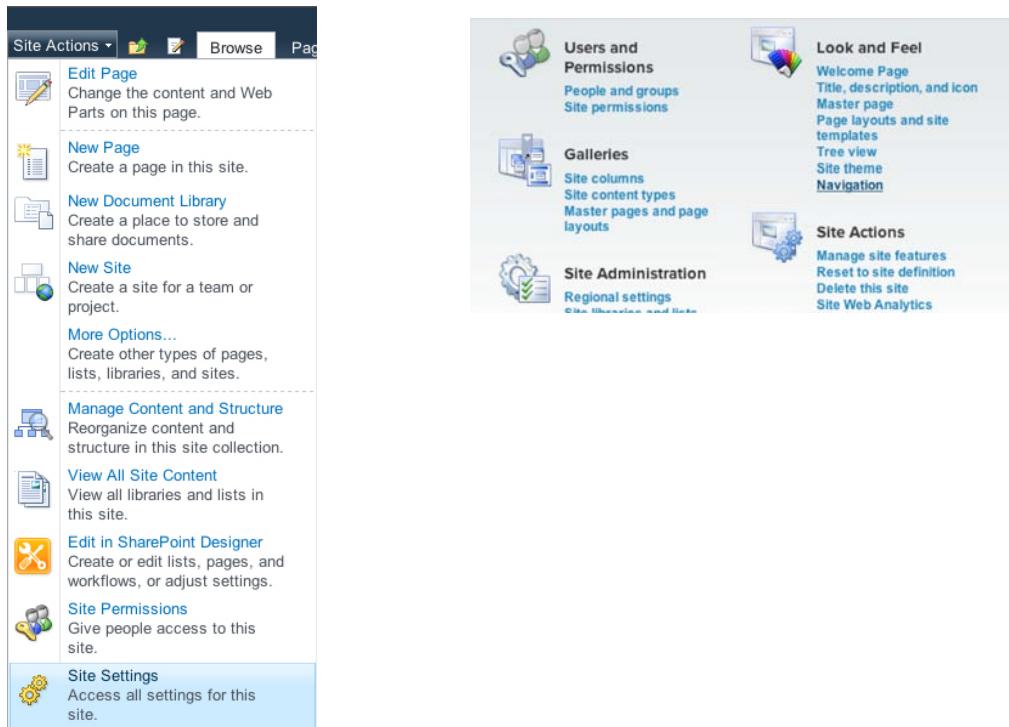
Option 1: Do nothing. Keep the new page visible only to your Collaboration Zone Admins. They can access the page by **Site Actions/Manage Content and Structure/Pages** and then click on the “New Page Name” to open.

Option 2: Create a new **hyperlink** (internal) on your default landing page (domain, committee, or group) that links to your new created page’s URL.

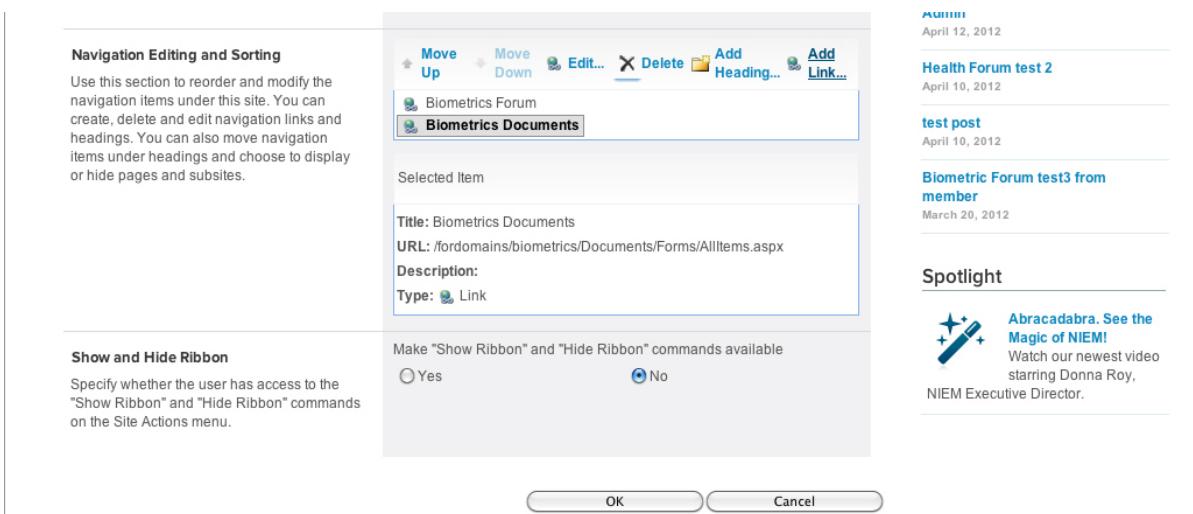
Option 3: Create a new **right side menu** item. Add the new page underneath the [CZ] Forum and [CZ] Documents navigation. A maximum of 5 new pages to display in the right side menu is recommended.

Steps for creating a **new right side menu** item:

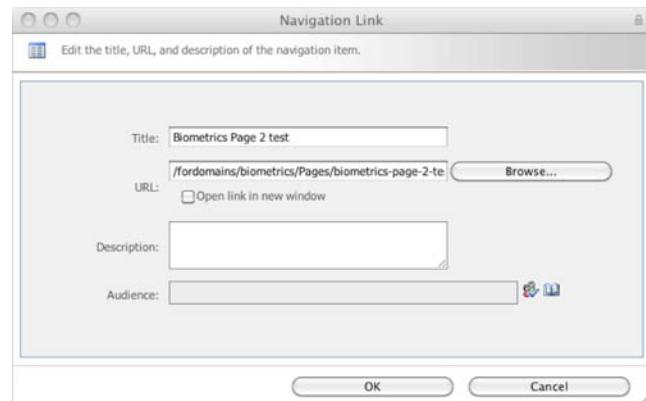
- 1) First navigate to your Collaboration Zone, make sure you’re logged-in, and select **Site Actions/Manage Content and Structure/Pages** and then click on the “New Page Name” to open.
- 2) When your new page has opened, select **Site Actions/Site Settings** and then click on **Navigation** under **Look and Feel**.



- 3) Go to the **Navigation Editing and Sorting** section and click on **Add Link...** icon.



A **Navigation Link** dialogue box will appear. Fill out the **Title** (This will appear in the right menu area), Put in the **URL**. Since these pages are internal, you only need the path after <https://www.niem.gov>. In this example, we opened our newly created page and copied everything after the ".gov" and pasted this path below "/fordomains/biometrics/Pages/biometrics-page-2-test.aspx" in the **URL** field. Click on **Open link in new window** if that option is desired and select **OK**.



- 4) Notice the new page link "**Biometrics Page 2 test**" now exists and use the "**Move Up or Move Down**" so it appears after the [Collaboration Zone] Documents. Click **OK** at the bottom of the main **Navigation** dialogue box. Go back to your main CZ default page and check your right menu navigation to ensure that what was just added is working correctly. Make sure your new page link, right side menu item stays highlighted when you click on it.

To delete an existing page (other than the default page) within your site. Start from your Collaboration Zone page and select **Site Actions/Manage Content and Structure**. Select the page to be deleted. Select **Actions/Delete** and then **OK**. You can also choose other active actions as well.

The screenshot shows the SharePoint 'Site Settings' interface under 'Site Content and Structure'. On the left, there's a navigation tree with categories like Home, Connect With NIEM, Find an IEPD, etc., and a 'For Domains' section with 'Biometrics' expanded, showing 'Pages' selected. The main area displays a list of pages with columns: Type, Name, Modified, Modified By, Checked Out To, Contact, and Page Layout. One page is selected, and a context menu is open, showing options: Move, Delete, Check Out, Discard Check Out, Check In, Publish, and Unpublish this version. The 'Delete' option is highlighted with a yellow background.

Type	Name	Modified	Modified By	Checked Out To	Contact	Page Layout
blob	blob	4/9/2012 10:52 AM	10#fifba_niem_membership_provider(key02)	10#fifba_niem_membership_provider(key02)	Hunt, Christopher (NIH/CIT) [G]	General Landing Page
blob	blob	4/9/2012 2:55 PM	10#fifba_niem_membership_provider(key02)	10#fifba_niem_membership_provider(key02)	10#fifba_niem_membership_provider(key02)	Body Only with Webpart Zones
blob	blob	4/9/2012 12:52 PM	10#fifba_niem_membership_provider(key02)	10#fifba_niem_membership_provider(key02)	10#fifba_niem_membership_provider(key02)	Body Only with Webpart Zones