Using the My Portal Collaboration Space



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What you need to know about My Portal roles

The person who <u>creates a team</u> (instructions PDF) s automatically assigned three important roles: Team Lead, Team Manager and Team Coordinator. If you will have additional people support managing the team, it is recommended that you assign them as both Manager and Team Coordinator to allow access to a range of functionality on the site.

Actions these roles can take include:

- Approve requests to join the team
- Access the View/Edit options for the team
- Add team links
- Add team tools
- Create a calendar
- Add or remove members of a team once their account has been approved by the Portal Support team
- Archive folders

Only the Team Lead will receive emails when people request to join the team after their WA Portal account has been approved. This assignment can be changed from the Edit page. (See <u>What you can do from the Edit button</u>). Note: You can change the original Team Lead and designate someone else as Team Lead to manage team member requests. Making someone a Team Manager or Team Coordinator is a different process. See <u>What you can do from the Members button</u> to give someone on your team additional permissions.

What a Team Member can do

Most participants in your team will have access as a Team Member. A member can see and click on any items provided in the team dashboard, such as team links, messages, and document folders. Other actions a Team Member can take include:

EXCHANGE FORUM

- Create an Exchange message
- Include a link in a message
- Include an attachment
- Upload a file
- Reply to an Exchange message (message content remains within the Portal)
- A team member cannot delete their message after it has been submitted (but a Team Manager can)

VIEW DOCUMENT FOLDERS

ADD A NEW FOLDER

- Manage Team Folders
- Create a folder and add text, links, and attachments
- Edit any text, links, and attachments put into any folder by other team members
- Can delete <u>any</u> folder and its contents
- See any folders moved to Archive status

VIEW TEAM EVENTS

- Use the team calendar
- Can create an event and include links and event details
- Edit the event
- Delete <u>any</u> event

Using the Team Coordinator dashboard

If you are a Team Coordinator for more than one team, the Dashboard supports connection across multiple teams. Uses:

- Provides notification when there is a new member waiting for approval to join a team
- Helps to create an email to one or a selection of members in the team
- Makes it possible to share a document or link in a selection of teams

eam	s Coordinator Dashboard		
Tea	ms Management		
Act	ions		
- Se	elect -		
-	Team Name 🔷	Last Active 🌲	Member Activity
	f2f18_autumn	12/30/18	View
0	LAMMHA, Los Angeles Maternal Mental Health Access	03/04/20	View
0	MaMHA admin	07/14/21	View
0	🗱 MaMHA webinar series	09/29/21	View
	MaMHA LC - Sea Mar	01/05/22	View
0	🗱 MaMHALC - Harborview OB-GYN	01/07/22	View
0	MaMHALC - Meridian Women's Health	01/31/22	View
	🏶 MaMHA LC - Rainier Valley Midwives	03/07/22	View

Choose from the options in the Actions drop-down to either add a link to one or more teams, or to add a new file to one or more teams.

The dashboard provides a list of all teams that you are designated Team Coordinator.

The exclamation symbol lets you know which teams have pending requests to join the team. Requests to join a team also will appear on the upper right when

you are in the team dashboard.

Teams Coordinator Dashboard

Pending Approvals

My Teams

What to access from the team space dashboard

These options are visible only to someone with a Team Manager/ Coordinator status.	Exchanges Search Terms View	and Team Docum	ents S Conten - Any All enti	Search It type APPLY ties Members Nodes
 Click Edit to: Change the name team Change the person to respond to resp	ne of your son assigned quests to join ur team ess	Caution: Click De only to permanent remove the team a all documents or messages from the Portal	lete ly and	 Click Members to: Assign someone a role within your team, such as Team Leader or Coordinator Add anyone with a WA Portal user account to your team Approve a request to join your team Remove someone from your team
About All entities Entities and Nodes sorts anything add members to docur another way to find or files stored in your You will need the a your team for the f	and Nodes s are technical led to your teal nents and cale d, manage, or our team. All Entities pag first time.	terms for how the site m, from individual endar events. It can be remove a team membe je to add a calendar to	ər	Jouriouni

What you can do from the Edit button

View Edit Delete All entities Members	Nodes
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As a Team Manager or Team Coordinator, you will have access to the Edit button, which will allow you to do the following:

- Change the name and description of the team
- Change the Team Lead (the person who will receive emails when people request to join the team after their WA Portal account has been approved)

The team title and description is visible to anyone with an account on WA Portal when they are searching for a team to join. You can change the team's name in the Title field at any time without affecting access to the team and its contents. Be as transparent as possible in the team title and description so a new user on WA Portal can recognize whether your team is intended for them using the Find a Team search tool.

Tip: You will need to change the name here if the person named Team Lead is no longer involved in your collaboration project on the Portal. It also would be best to change the Team Lead if that person will not be checking emails for a long time, such as for a lengthy vacation or personal

Team Links and Team Tools

Within the Edit screen, you can offer a display of an unlimited number of links for your team.

Team Tools works just like **Team Links**, but it places the links in the right navigation instead of the top of the team dashboard.

Tip: You can use team links or tools to point to a document folder or a file in your document folder.

Help your team members distinguish between links and tools by primarily using the Team Tools section for such things as templates, guides, evaluation, and quality control tools.

Description	
Team Lead	
	0
Group Status	0
Active	0
Active V Group creator	0

Changing the team lead

Begin typing the last name of someone else from your team into the space. The system will display the names of anyone with a WA Portal account. Click the name you are searching for and then click Save on the bottom of the page.

Group creator is the person who created the team. You can change the name here to anyone with a WA Portal account but doing so **does not give the person access to the team or any manager permissions.** See <u>What you need to know about My Portal roles</u>.

Exchanges and Team Docume Search Terms	nts Search ontent type - Any -	My Teams Incredibles Live site Andino test of team roles
Team Links 3 steps to create a My Portal team	Recent Team Exchanges How to begin planning for our session on goals and objectives	<u>My Portal Example Team</u> <u>PHOCIS test team</u>
Our web page for Portal instructions See Portal Partner webpages Adolescent Health Training More training	What did you think of the points raised in our guest speaker's presentation? Can anyone share favorite data management tool? Effective communication Effective conmunication	Team Tools Team building blog# Webinar library Research Articles & Relevant information State legislative calendar#
Bree Collaborative meeting BH webinar Resources for Providers Conference link SmartWA tool Document Folders 2022 meeting agendas & noi	25	VIEW TEAM EVENTS

Team Links

Team Tools

Tips for using the Team Links and Team Tools feature

0
0
0
0
Tow weights
0
0



When you have more than one link, click the crossed arrows to drag and reorder your list of links.

Or click *Show row weights* and reorder the list of links numerically.



This field will display all documents stored on WA Portal (e.g. saved in a team folder) that include the word(s) you type here. To make it easier to find your documents, use the name of your project or team, or a unique abbreviation, in the title of the file.

Want to link to a document that's already in one of your folders?

There are two ways you can link to a document you saved in a team folder:



Once you have uploaded a file to a team folder, navigate to the Edit window.

In the Team Links or Team Tools URL field, type any word or words in your file name.

Scroll down to view web pages (labeled as "Content") or files that match the word(s) you typed. Click the file with the name you want to link to. The system fills in the node number of the item you're linking to.

Click Save.

Add Link ×	
URL	
Grant O	
Content	^
\$30 million SAMHSA grant to help address substance use and overdose epidemic	ľ
Grant Opportunity thru DBHR for Trauma Informed Approaches adoption	
988 State Planning Grant & National General Information	ł
988 State Planning Grant Community of Practice	
988 State Planning Grant Deliverables	
File	
2019 WA State CDSME Grant Contacts.docx	
7722-Homeless grant.png	÷
988 Planning Grant Core Activities_0.pdf	
988 State Planning Grant Community of Practice.docx	
988 State Planning Grant Implementation Coalition.docx	
April 2021 988 Planning Grant - Agenda.pdf	



As a Team Manager or Team Coordinator, the **Members** button is where you control who can access your group and what permissions they have within the group. What you can do from the **Members** button:

- Add anyone with a WA Portal account to the team
- Approve or decline someone's request to join
- Remove a member from the team
- Give someone on the team a higher level of permissions or change existing permissions assigned to someone

Add someone to your team

Use the Add User field to search for the name of someone with a WA Portal user account that you would like to add to your team. Click *Submit* after finding the correct name. You also can use the Approval Form where you can select "yes" or "no" to include them in the

View	Edit	All entities	Members	Nodes			
Add User Search By La	st Name				0		
User	Roles		Updated	Joined	\$	Operations	Approval
Victor Andino	Team Team	n Manager ns Coordinator	05/09/2022 - 08:	42 05/09/202	2 - 08:42	View member 🔹	Approval Form

team. You can use "no" to remove an existing member or to deny a new request.*

Manage permissions for someone in your team

	Josep	oh Liu	l	
_	View	Edit	Remove	
Edi	it <i>Joseph</i>	Liu		

Home » My Portal Example Team » All entities for My Portal Example Team » Victor Andino

Remove

Edit

View

Team Manage

Save

Teams Coordinator

Delete

Roles

Click *View member* to give someone in a team more permission to assist with managing the team or to remove existing permission.

The next screen gives you the option to Edit their roles or Remove them from the team.

After selecting *Edit*, you can add the person as a Team Manager and/or Team Coordinator. There are no limits to how many people are assigned these roles. See page 2 for permissions that come with My Portal roles.

From here you can also choose *Delete* to remove the person from your team. This only removes them from one specific team, it does not delete their WA Portal account or their membership in other teams. Settings here also do not affect their roles in other teams. You will need to go into other teams to edit their roles there.

*Anyone who has been approved for a My Portal user account can search our directory of teams that are using the collaboration space. Sometimes these users are unsure of the name of the team they were invited to join. Others may be interested in your team's work based on the name or description. If you receive multiple requests from outsiders, you can use the description field to clarify that your team is closed to new or uninvited members. You may also want to consider allowing someone into your team if their credentials or experience will add value to your collaborative work. Out of professional courtesy, before denying a request, copy the email address of the person requesting to join from the Pending Member screen and send them an email explaining your team is closed to new members.

Creating and adding folders

The document folders section allows for a lot of flexibility for placing documents within folders, but also for using the space to present information, including links, tables, and images within each folder.

	Folder title *
Click here to add files to a folder.	▼ TEAM DOCUMENT Add a new file Choose Files No file chosen Unlimited number of files can be uploaded to this field. 100 MB limit. Allowed types: pdf doc docx xls xlsx ppt pptx csv jpg png.
Use the Folder	Folder Description
Description space to	B I x ² x ₂ ⓓ I _x + + + = = = = + → ⊕ ⊕ = = → □ = = = → Format → Styles → 目 ✿ → ⊠ Source
add text that will	
appear above the \prec	
list of files	
You can also use the	
features in the editing	
ribbon to add more to	Text format Full HTML

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When you use the **Team Document** tool, it will present your files as a list within a table that includes an optional section for a description of each file.

a folder.

You also can use the **Folder Description** space to upload files by using the link icon.

File	Description
Getting Started on My Portal.pdf	Instructions and FAQs for new WA Portal users
WA Portal Page Set Up Form2023.docx	Complete and submit form to WA Portal support team to request a web page
How to Join My Portal or Join a Team.pdf	Details for logging in and joining a team
🖺 WA Portal new user list xls	Provide a list of the people you wish to include in your team and the Portal team can add them all at once to your team. No need for them to register!

- Styles

- 📃 🔅 - 🐼 Source

Text format Full HTML 💌

Folder Description

About text formats 🕜