## Table of Contents

## What you need to know about My Portal roles

The person who creates a team (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 What you can do from the Edit button). 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 What you can do from the Members button 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 any folder and its contents
- See any folders moved to Archive status

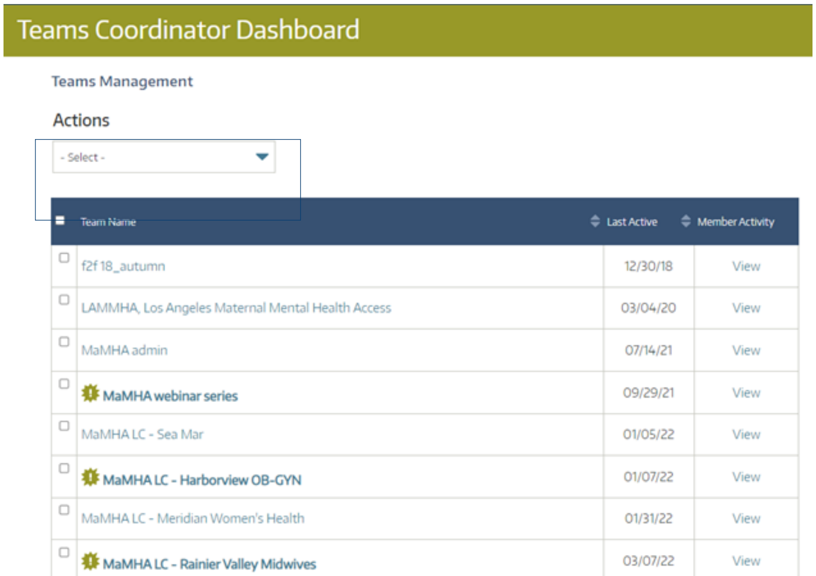
VIEW TEAM EVENTS

- Use the team calendar
- Can create an event and include links and event details
- Edit the event
- Delete any 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:

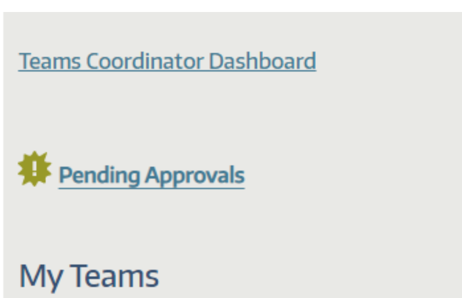
- Provides notification when there is a new member waiting for approval to join a team
- Helps to create an email to one or a selection of members in the team
- Makes it possible to share a document or link in a selection of teams



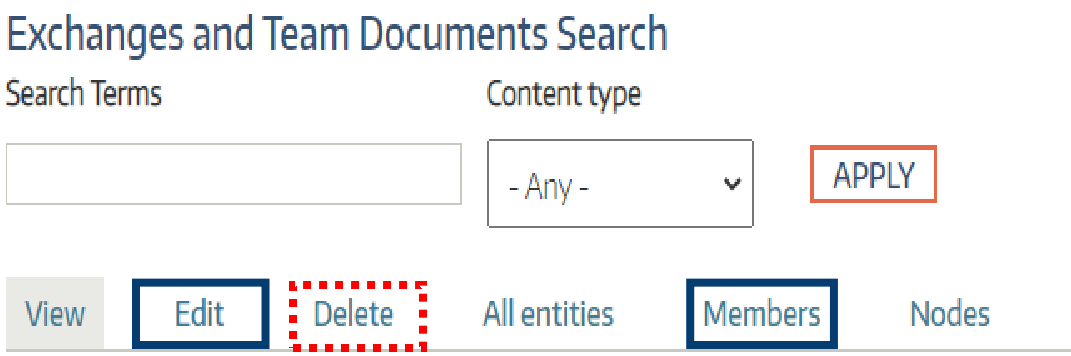

Choose from the options in the Actions drop-down to either add a link to one or more teams, or to add a new file to one or more teams.

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.



# What to access from the team space dashboard




These options are visible only to someone with a Team Manager/ Coordinator status.

Click **Edit** to:

- Change the name of your team
- Change the person assigned to respond to requests to join your team
- Add links for your team members to access

**Caution:** Click **Delete** only to permanently remove the team and all documents or messages from the Portal

Click **Members** to:

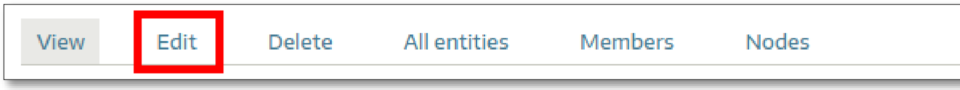
- Assign someone a role within your team, such as Team Leader or Coordinator
- Add anyone with a WA Portal user account to your team
- Approve a request to join your team
- Remove someone from your team

About **All entities** and **Nodes**

Entities and Nodes are technical terms for how the site sorts anything added to your team, from individual members to documents and calendar events. It can be another way to find, manage, or remove a team member or files stored in your team.

You will need the All Entities page to add a calendar to your team for the first time.

## What you can do from the Edit button

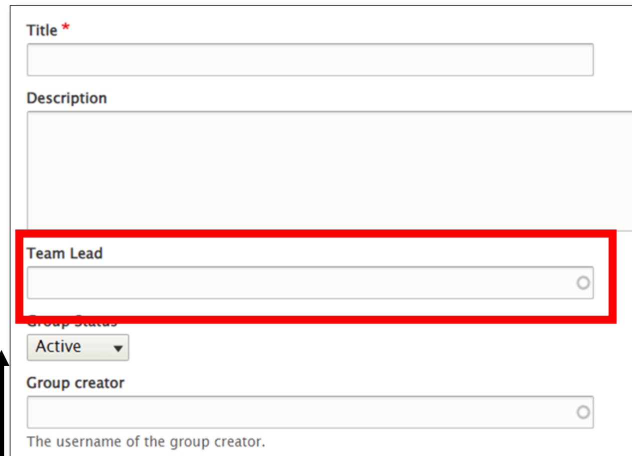



As a Team Manager or Team Coordinator, you will have access to the Edit button, which will allow you to do the following:

- 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




### 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 [What you need to know about My Portal roles](#).

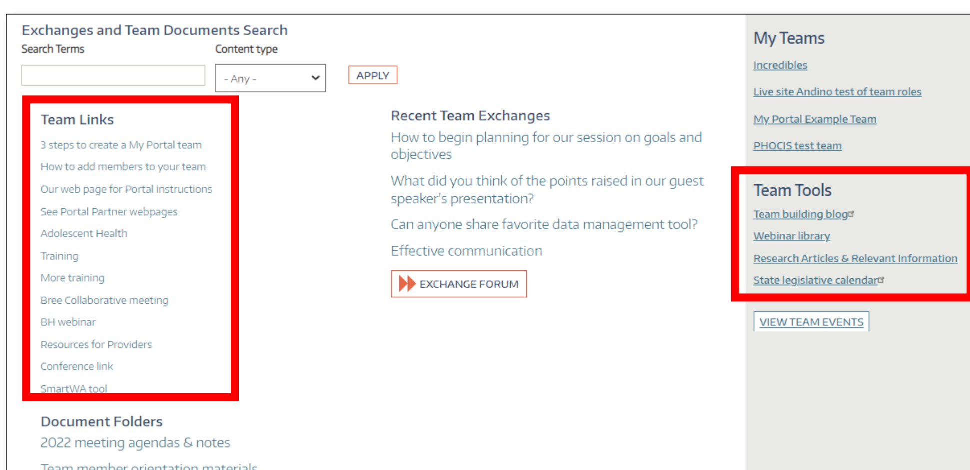
### Team Links and Team Tools

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

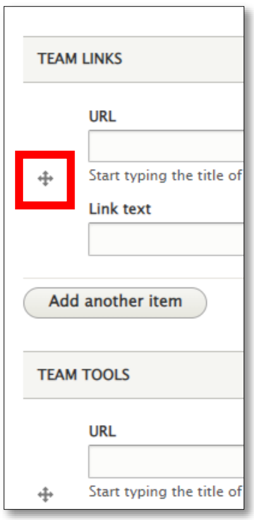
**Team Tools** works just like **Team Links**, but it places the links in the right navigation instead of the top of the team dashboard.

**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.

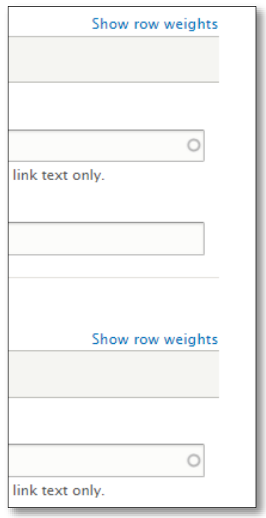



# Tips for using the Team Links and Team Tools feature


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.

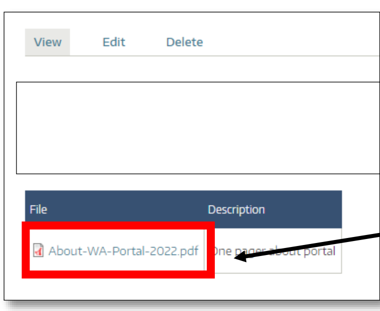



This field will display all documents stored on WA Portal (e.g. saved in a team folder) that include the word(s) you type here. To make it easier to find your documents, use the name of your project or team, or a unique abbreviation, in the title of the file.

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

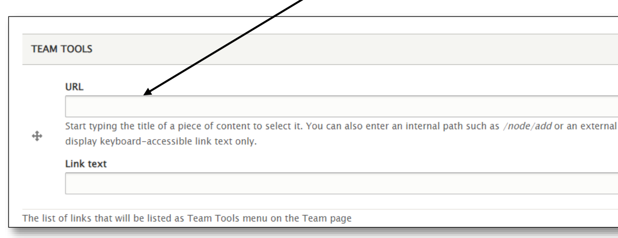
There are two ways you can link to a document you saved in a team folder:

1

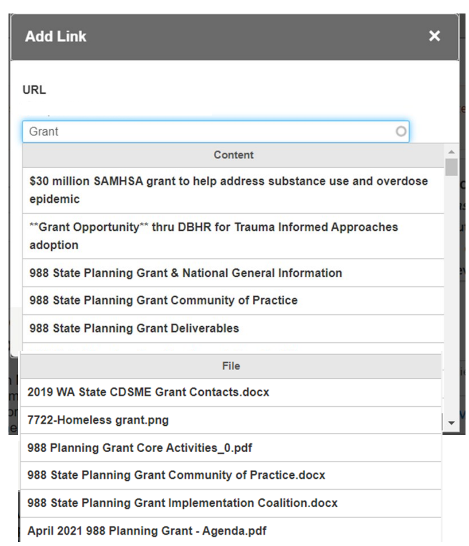



Right-click the link and choose Copy link. Paste the link in the Team Links or Team Tools URL field.

2




or



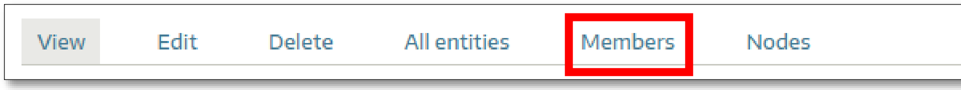

Once you have uploaded a file to a team folder, navigate to the Edit window.

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*.

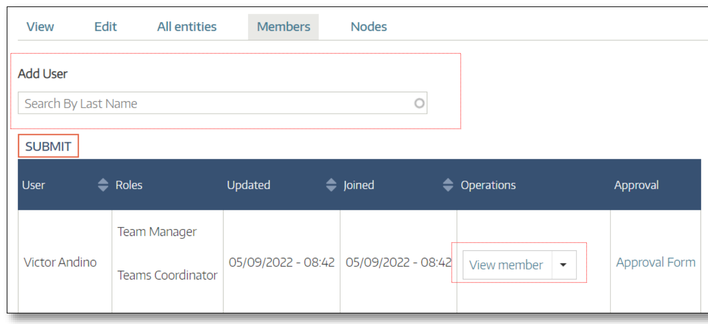
# What you can do from the Members button




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:

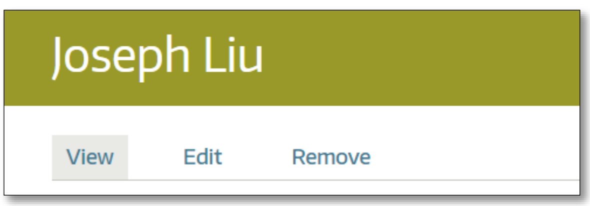
- Add anyone with a WA Portal account to the team
- Approve or decline someone's request to join
- Remove a member from the team
- Give someone on the team a higher level of permissions or change existing permissions assigned to someone

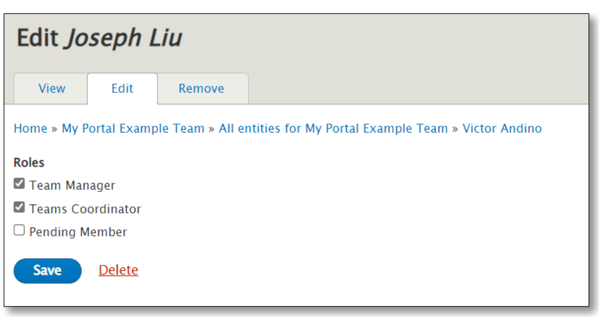
## Add someone to your team




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

## Manage permissions for someone in your team




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.

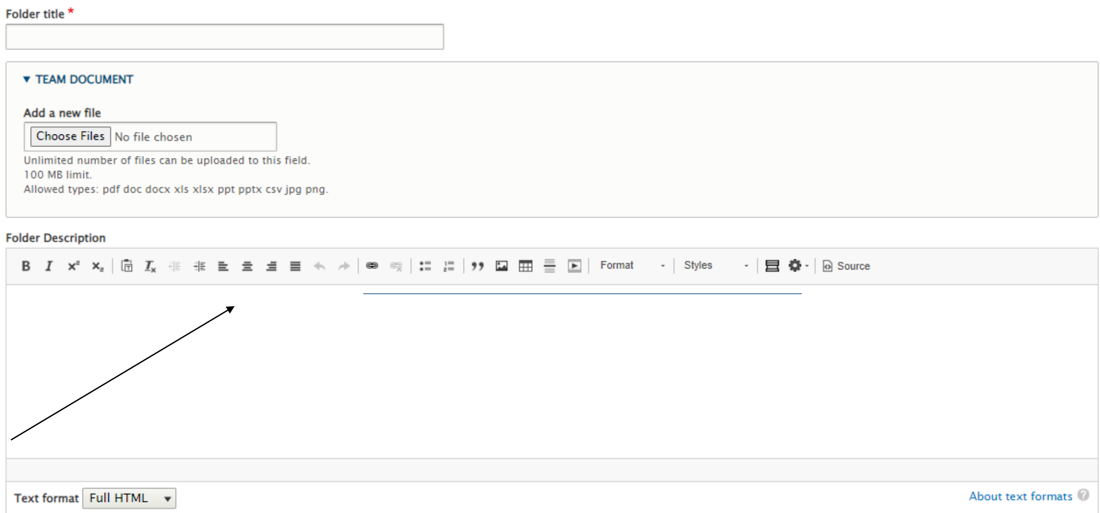
# Creating and adding folders

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.

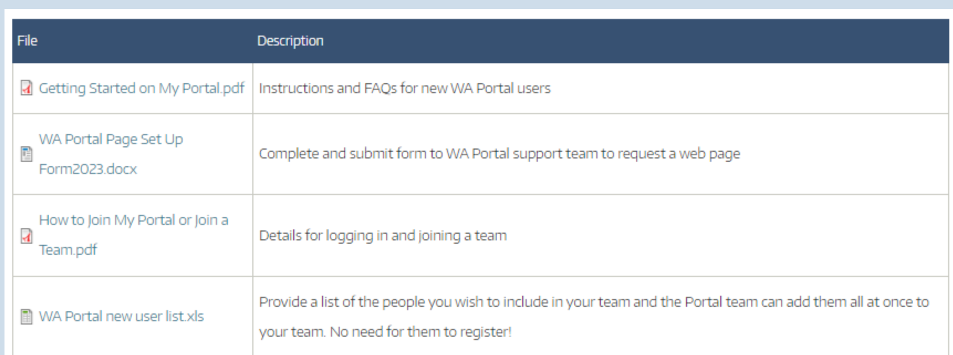
Click here to add files to a folder.

Use the **Folder Description** space to add text that will appear above the list of files.

You can also use the features in the editing ribbon to add more to a folder.




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.



| 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! |

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