



# ForumPass Familiarization Participant Workbook February 2020

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**EXOSTAR<sup>®</sup>**

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## DOCUMENT VERSIONS

<b>Version</b>	<b>Change Overview</b>	<b>Date</b>	<b>Responsible Party</b>
ForumPass 6.7	Formatting Updates	02/12/20	Ashleigh Howell



## INTRODUCTION

This guide is intended as a companion to the instructor-led ForumPass Familiarization training. This guide provides users with an introduction to ForumPass and highlights how to get started using the tool.

For more detailed information on the ForumPass solution, please refer to the ForumPass User Guide located here: <https://my.exostar.com/display/TE/ForumPass+Downloadable+Guides>.

## PRODUCT SUMMARY

ForumPass, Exostar's secure collaboration solution, is built on the Microsoft SharePoint 2013 Platform and is enhanced with multiple security features. The solution enables customers from many industries to efficiently, effectively, and securely exchange business-critical documents and build intranets and extranets, all while maintaining compliance with applicable policies and regulations.

Many Aerospace and Defense and manufacturing organizations use ForumPass to coordinate project management and design activities with their customers and supply partners in the centralized, secure environment. ForumPass has a simple and streamlined user interface that allows users to share information through internet sites for project collaboration, social networking, and other activities.

ForumPass users benefit from enhanced collaboration throughout every aspect of product design and development. These benefits are realized through improved communication, better quality, faster cycle times, and cost reduction.

### Microsoft SharePoint Platform

The foundation of ForumPass is Microsoft Office SharePoint Server 2013 Platform. As one of the fastest growing applications in the Microsoft product suite, SharePoint provides tools to help simplify information management and collaboration.

SharePoint uses several building blocks, which can be combined to create a variety of business solutions:

- **Project Sites:** Provide a central location to securely store, manage, and collaborate on items and information. Sites can be customized to best suit your business needs.
- **Apps:** Application web pages that make up the project site collections. Apps can be added, edited, or removed from your site collection in order to best organize and present relevant information. Most commonly used Apps include: Document Libraries, Task Lists, Discussions, and Calendars.



- **Workflows:** Allow for information to be sent through a defined business process in order to collect feedback and approvals.
- **Alerts:** Allow users to subscribe to items and receive notifications of added or changed information.
- **Search:** Provides the ability to find information when needed.

These building blocks form the foundation of ForumPass and are either utilized out of the box, or enhanced based on Exostar's customer requirements.

### Exclusive Features

Leveraging the Microsoft SharePoint capabilities, ForumPass includes many features enabling individuals to work together effectively by allowing them to easily share information regardless of location, while ensuring client organization's information is secure and separate.

ForumPass is customized with several exclusive features and enhancements including:

- **Multi Tenancy:** Allows organizations to coexist in shared workspaces, while ensuring each organization's information is secure and separate. Ensures compliance with industry standard security requirements.
- **Managed Access Gateway (MAG):** Provides a consolidated portal for registration, authentication, and account management.
- **ForumPass Profiles:** Organizations have the option to subscribe to different categories of user profiles: Core, Sensitive, Restricted, and Protected. ForumPass Site templates are allocated to organizations based on their user types.
- **Integrated WebEx Functionality:** Provides the ability to schedule and manage web-based meetings and host instant meetings. Organizations may opt to subscribe to the ForumPass WebEx service.
- **End to End Encryption:** For content stored in Sensitive, Restricted, or Protected sites.
- **My Workspaces:** Provides users with a dashboard to all their projects, tasks, alerts, checked out work, links, discussions, and the quick access page. This page displays upon login, directly from MAG.
- **My Links Menu:** Allows you to add links to sites you access most frequently. My Links list is easily accessible from the top navigation bar.
- **Invite-By-Email Feature:** Makes inviting users to your site quick and easy.
- **Custom Workflows:** Allows the flexibility for organizations to define desired workflows for implementation.
- **ForumPass Support Site:** Accessible by all ForumPass users, provides support information such as Release Notes, FAQs, as well as User and Training Companion Guides.

## GET STARTED

Exostar uses MAG as the authentication and entry point to ForumPass. MAG extends the concept of Web Single Sign-On (SSO) to support highly sensitive applications, which host proprietary and/or sensitive data. MAG provides the following:

- **Identity & Access Management:** A state-of-the-art, cloud-based platform that provides simple and secure access to applications.
- **Certified Public Key Infrastructure (PKI):** Full lifecycle management of digital certificates, strong authentication practices, and controlled access to applications.
- **Multifactor Authentication:** Reduces risk and provides stronger online identity protection.
- **Identity Proofing:** Provides varying levels of identity verification to address enterprise compliance and access policies.

All users must be registered in MAG prior to gaining access to ForumPass. MAG registrations can be initiated by the user, via a self-registration process, or can be managed by your organization's designated administrators. For more information on MAG, please visit <https://my.exostar.com/pages/viewpage.action?pageId=12124922>.

### MAG and ForumPass Access

To access ForumPass, you must have a MAG login (as described above), and you must be provisioned for ForumPass application access.

To access MAG and ForumPass:

1. Complete your First-Time Login.
2. For subsequent logins, go to <https://portal.exostar.com>.
3. Enter your **User ID** and **Password**.

**NOTE:** Users with digital certificates or tokens (2FA) are prompted to invoke their credential at this time.

4. From the Home tab, locate the ForumPass application and click **Open Application**.

**NOTE:** If you do not have the **Open Application** option, click **Request Access** for your Application Administrator to review and approve your access request. In the meantime, your status displays as **Pending** until approval is complete.

## MY WORKSPACES PAGE

The My Workspaces page displays upon login from MAG. This landing page displays all projects to which you have access, all checked out work, all tasks assigned to you, and all alerts assigned to you, as well as self-help tiles. Each tab contains additional details, and each tab has a



navigational feature at the bottom of the table for you to scroll through pages and determine how many items display.

Site Collection Administrators can customize this page with branding elements.

### Workspaces Tab

This tab displays all projects you are permitted to access, as well as the following additional details:

- Clickable Workspace names
- Clickable Site Collection names
- Profile type
- Project creator
- Template type
- Last modified date

### Checked Out Tab

This tab provides a list of all work you currently have checked out, as well as the following:

- Title
- List or library the file is located
- Site Collection and Workspace where the file is located
- Creator
- Last modified date and time

### Tasks Tab

This tab provides all tasks created by you and currently assigned to you, as well as the following:

- Clickable task name
- Site Collection and Workspace where the task is located
- Creator
- Status and priority
- Due date

### Alerts Tab

This tab provides all alerts created by you and all alerts created by someone else on your behalf, as well as the following:

- Title
- Site Collection and Workspace where the alert is located
- Status and frequency
- Last modified date and time



## Self-Help Tiles

The following clickable, navigational tiles display at the bottom of the My Workspaces page:

- **My ForumPass Profile:** Opens a new window and provides edit option for your ForumPass profile.
- **My ForumPass Support:** Provides access to guides, FAQs, and release notes.
- **My MAG Profile:** Redirects to the **My Account** tab of your MAG account.
- **My WebEx Personal Room:** Opens WebEx, where you can host, schedule, or join meetings.
- **Getting Started FAQ:** Redirects to the FAQ portion of the Support Site.
- **ForumPass 6 Training (Scheduled):** Opens WebEx to join scheduled ForumPass trainings.
- **ForumPass 6 Training (Prerecorded):** Redirects to a prerecorded ForumPass Familiarization training you can playback or download.

## CONSISTENT NAVIGATIONAL FEATURES

These next sections walk through basic ForumPass navigation, to include consistent menus, the search functionality, My Links and other features.

### User Access Menu

Your User Access Menu is located in the upper right corner of all Site pages. It consists of the following:

- **About Me:** Access your profile page to update information about yourself such as your contact information, role, interests and other details.
- **Sign Out:** Logs out of ForumPass.
- **My Workspaces:** View the list of project sites, documents, and items you have access.
- **My WebEx Personal Room:** Provides access to your personal space in WebEx from which you may schedule and join meetings and host instant meetings. Credentials carry over from ForumPass, so you do not need to reenter login information.
- **My Information Service:** Provides access to the following tabs:
  - **My Forumpass:** Provides high-level site and login status information.
  - **Site Ownership:** Provides a list of all owners of this particular site, as well as the site collection administrators of this site collection.
  - **User Search:** Allows you to verify users' ForumPass access.
  - **Additional Resources:** Provides links to the ForumPass Support Site, my.exostar.com support, as well as Customer Support.

## Search Functionality

A basic search can be performed from any page in ForumPass. This feature provides the ability to search sites, lists, and libraries you have access to, within the site collection, in order to find information and documents.

### NOTES:

- Keywords and phrases can be used in the search field
- Search filter options allow you to select to search for Everything (all matches), or to limit searches to Conversations, People, or This Site.
- The default search results include all indexed content that match your search criteria, and that you have proper permissions to access.

From the search results page, users can further refine the results by clicking additional search filters offered in the left navigation menu. Hovering over an item in the search results offers a preview of that item.

### Search Tips:

- ForumPass supports full word searches (full words separated by spaces). Partial keyword searches.
- Wildcard (e.g. \*, \$, #, etc.) searches are not supported.
- Search results are controlled by the scope of the search, as set by the Administrator, as well as the user.

## Settings Menu

The settings menu gear provides administrators access to manage site permissions, view and modify site settings, and add content areas or Apps. The options available on the Settings menu are permissions driven, and vary depending on the page you are viewing and your permission settings. The settings gear is located next to the User Access Menu.

## My Links

The My Links list provides quick and convenient access to your most frequented projects, lists, or internet content. Once you access a project site, you may want to add a link to the site in the My Links list.

### To add a link:

1. Access the site you would like to add your **My Links** list.
2. Select **Add to My Links** from the **My Links** drop down.
3. The **Add Link** dialogue box displays. The **Title** and **URL** are pre-populated, but editable.
4. Optionally, in the **Add to Group** section, place your links into groups, either by selecting an existing group or creating a new group.



5. In the **Show To** section, use the drop down menu to choose who can view the links you established.
6. Click **OK** to complete the process.

To further manage you links, select the **Manage My Links** option from the **My Links** drop down.

### Quick Launch Menu

The Quick Launch Menu is located along the left side of all project site pages. The Quick Launch Menu:

- Displays links to featured site content containers such as lists, libraries, sites, and publishing pages
- Can be configured, reordered, and its contents vary from site to site.
- As new apps (libraries, lists, etc.) are added to the site, the Site Creator can choose to include a link to the item on the Quick Launch Menu.

Because this menu is configurable, all lists and libraries may not always display. You can view all content areas associated with the site by selecting the **Site Contents** link from the menu.

## BASIC FUNCTIONALITY

In this section we provide step-by-step instructions on how to execute common, basic functionality within a library, including:

- Folder Creation
- Document Upload and Download
- Check out and Upload a New Version
- Create and Manage Alerts
- Versioning
- Document Workflows
- Encrypted Document Library Upload/Download

The icons used to manage content are housed in the Files/Items toolbar. This toolbar offers many commands used to help manage the content (files or items) within the content area (library or list). The number and types of controls available on a toolbar ribbon vary as they are dependent on the content and your permissions within the content area. It is also important to note, many icons remained grayed out until you place a checkmark next to files or folders.

### Create Folder

Folders are used in lists and libraries to organize items or documents. Users have the ability to create folders and sub-folders to store their files.



To create a new folder:

1. From the **Files** toolbar ribbon, click the **New Folder** icon. The **Create a new folder** dialog box displays.
2. Name the new folder. Click **Save**.

The library refreshes and your new folder displays.

## Add Content

There are a several of ways to add content to a list or library:

- Upload content from your local environment.
- Create a new file directly in ForumPass using desktop integration.
- Drag and Drop content into a library.
- Upload File Structure allows you to add compressed or zipped folders into the library or list.

## Upload Document

To upload a document from your local environment:

1. From the **Files** toolbar, click the **Upload Document** icon.
2. Click **Browse** and navigate to the file you want to upload.
3. If versioning is enabled in the library, select or deselect the **Add as a new version to existing files**, as necessary.
4. Optionally, choose a **Destination Folder**.

**NOTE:** This provides folder options directly in your site. If you leave the field blank, the file uploads in your current location.

5. Add **Version Comments**, if applicable.
6. Click **OK**.

The library automatically refreshes with your document.

## Create New Document

ForumPass supports the creation of documents using desktop integration with the server. This option reduces the steps required to create a new document on your local environment, and then upload it to ForumPass.

To create a document directly in ForumPass:

1. From the **Files** toolbar ribbon, click the **New Document** icon or select the **+new document** link located at the top of the library.

**NOTE:** The MS Office application associated with the library opens by default.

2. Create the file, and click **Save**. The ForumPass library shows as a save location.

The file is saved directly in the ForumPass library.



## Drag and Drop Content

You can add files to lists and libraries by simply dragging them from your computer. This is beneficial if you need to add multiple files at once, however, you cannot drag and drop folders; just use the **ctrl** key on your keyboard to select multiple files.

To utilize the drag and drop feature:

1. Open the desired library in ForumPass.
2. From a file explorer folder in your local environment, locate the files you want to upload, and drag them to the space in the library where it says drag files here.

**NOTE:** If there are files with the same name already in the library, the system prompts you to replace those files with the new ones.

## Upload File Structure

ForumPass supports adding compressed or zipped folders with multiple files stored. Once the compressed file is uploaded, you can then open the folder and access the files like a normal folder.

To add a file structure:

1. From the **Files** toolbar ribbon, click the **Upload File Structure** icon.
2. Select the **Browse** button and locate the file structure to upload.

**NOTE:** You must create the file structure in your local environment prior to adding it to the desired library.

3. Click **OK**.

The library automatically refreshes with the uploaded file structure.

## Check Out

Before editing a file, you should always check the file out to ensure no one else modifies the document at the same time. ForumPass captures the checkout event, and marks the document as checked out to prevent others from making simultaneous changes, potentially overwriting your work.

When a document is checked out, it is denoted with a green checkout icon. When you have the file checked out, you may edit it online or offline, and save it.

ForumPass does not prevent another user from accessing a checked out document; however, ForumPass does prevent new versions of a document from being uploaded while the original document is in its checked out state.

To check a file out:



1. Place a checkmark next to the document to select it.
2. From the **Files** ribbon, click the **Check Out** icon.
3. Click **OK** to check the file out.

The object is checked out to you and the document icon is updated with the checked out indicator.

## Share

The Share command allows you to easily share and control access to a specific document or folder with colleagues who does not otherwise have access to the site.

The Share icon is located throughout ForumPass. On project site pages, the Share icon is located in the upper-right navigational elements; and in lists, the Share icon is part of each toolbar ribbon.

To share an Item:

1. Place a checkmark next to the document to select it.
2. From the **Files** toolbar, click the **Share** icon.
3. The **Share** page displays. Enter the user names or email addresses to add users.
4. Optionally, include a personal message.
5. Choose a level of permissions to assign the users.
6. Click **Share**.

The new users receive an email notification.

## Manage Properties

ForumPass libraries maintain standard properties for items, such as title, author, date created and date updated, as well as file size. ForumPass supports customization of file properties.

## View Properties

To view the properties of an items:

1. Place a checkmark next to the item to select it.
2. From the **Files** toolbar, click **View Properties**.

## Edit Properties

To edit the properties of an item:

1. Place a checkmark next to the item to select it.
2. From the **Files** toolbar, click **Edit Properties**.
3. Make desired changes and **Save**.



### Batch Edit Properties

To update the properties of multiple items at the same time:

1. Place a checkmark next to all items you want to update.
2. From the **Files** toolbar, click **Batch Edit**.
3. Make desired changes and **Save**.

### Versioning

When versioning is enabled, you can store, track, and restore items whenever they change. Versioning provides control over content available in the site and can provide great value if there is ever a need to refer to an older version of a document, or to restore an older version.

Versioning may only be enabled by users with permissions to manage the list or library. Additionally, versioning is turned on at the individual list or library level, so it does not affect the entire site.

With versioning enabled, new versions are created when:

- A list items is first created or a file is uploaded.
- A file is uploaded with the same name as an existing file, and the Add as new version to existing files is checked in the upload dialogue box.
- The properties of a list items or file are changed.
- A file is open, edited, and changed. A version is created when you click Save.

### Access Versioning History

To access the version history:

1. Place a checkmark next to the document to select it.
2. From the **Files** toolbar, click the **Version History** icon.

From the version history page you can view the details for a version, restore a previous version of the document, or delete a version of the document.

In order to view the content of a previous version of a document, click the version date/time stamp.

The ability to restore a previous version is available. It is important to note the restoration of a document does not overwrite or delete previous versions. Instead, it creates a completely new version within the library.

## Alerts

When working in ForumPass, you may want receive notifications of changed or added content. By creating alerts, you can stay up-to-date on changes to a ForumPass list or library, documents, discussions, and folders.

An alert can be established for any single item, folder, list, or library. Alerts are most commonly used on the following object types:

- **List/Library Item:** Checks a specific list item in any type of list; if the item is modified, you are notified.
- **Folder:** Checks a folder; if it is modified or if a file is added, modified, or removed, you are notified.
- **Complete List/Library:** Checks a specific list; if the list is updated, if a list item is added or modified, you receive an email.

## Create Alert

To create an alert:

1. Place a checkmark next to an item to select it.
2. From the **Files** toolbar, select the **Alert Me** dropdown, and select **Set alert on this document**.
3. On the **New Alert** page, complete the following information:
  - a. **Alert Title:** This is pre-populated, but is editable.
  - b. **Send Alerts To:** Your name is pre-populated

**NOTE:** With the proper permissions, you may set up an alert for someone else by utilizing the check names or browse functionality.

- c. **Send Alerts for These Changes:** You can choose under what circumstance you want an alert sent.
  - d. **When to send alerts:** Select how frequently you want to receive alerts.
4. When all criteria is selected, click **OK**. You receive an email advising the alert has been established.

**NOTE:** Emails from ForumPass could be directed to your JUNK folder.

## Create Alert for List or Library

When the alert is set up, the user specifies several options regarding the Alert.

To create an alert for a list or library:

1. Go to the desired library or list and open the Library ribbon.
2. Click the **Alert Me** icon.
3. Click **Set alert on this library** option.
4. The **New Alert** page displays. Complete the following information:



- a. **Alert Title:** Enter the title for this alert. This is included in the subject line of the email notification sent for this alert.
- b. **Send Alerts To:** Enter your name or email address.

**NOTE:** If you have permission to manage alerts, you can also create an alert for another person by typing his or her information into the Users box.

- c. **Change Type:** Choose the types of changes you want to be notified about.
  - d. **Send Alerts for These Changes:** Specify under what circumstances you want an alert sent.
  - e. **When to Send Alerts:** Specify how frequently you want to receive alerts.
5. When all the criteria is selected, click **OK**.

Once an Alert is created, you receive an email notifying the specified alert was successfully created.

## Workflows

Workflows automate the process of sharing an item for review, approval, or notification and reduces the manual steps required. Workflows are generally incorporated in document libraries, but may also be applied in list apps.

When you initiate a workflow, it sends email notifications to the participants, creates tasks in the task list, and the workflow's progress is recorded in a workflow history list. If a user fails to respond to a task, the workflow automatically sends reminders notifying participants that the task is pending or past due.

Standard workflows include:

- **Approval with Notification:** Sends an email notification to the specified participants containing a link to the item and instructions you include. A task is also created for the participants in the task list.
- **Review and Approve:** This is a two-stage workflow. In the first stage, this workflow routes the item to one or more reviewers. Once the review is complete, or deadline to review passes, it is routed to an approver or group of approvers.
- **Notification:** Provides the ability to alert a group of individuals on the status of a file to which they are assigned. This type of workflow is used to communicate information and does not require a response from any of the participants.

To initiate a workflow:

1. Place a checkmark next to the item to select it.
2. In the **Files** toolbar, click **Workflows**.
3. Select the desired workflow.
4. Complete the fields, which include participants, due dates, instructions.
5. Click **Start**.



Email notification are sent to participants, and task are created in the task list.

## Tasks

Your projects may include tracking lists, such as Tasks, Issue Tracking, or Project Task lists. Tasks allow for effective tracking of assignments and deadlines. Tasks can be a simple checklist of items, or can be more involved with start and finish dates, relationships with other tasks, and other associated task information.

To create a task:

1. From the **Quick Launch Menu**, select the desired task list.
2. From the **Files** toolbar, click **New Item**.
3. Complete the information for the new task.
4. To see additional task options, click **Show More**:
  - a. **% Complete**: Enter a percentage to indicate approximately how much work has been done.
  - b. **Description**: Type a brief description of the task.
  - c. **Predecessor**: Indicate which tasks in your project need to be complete before the current task can start.
  - d. **Priority**: Set the appropriate priority level.
  - e. **Task Status**: Set the appropriate status level.
5. Click **Save**.

## ENCRYPTED LIBRARIES

The ForumPass solution supports End to End Encryption (E2E). Encryption is invoked at the library level to ensure files contained within that library are handled and maintained with the additional level of security encryption provides.

Encrypted libraries are not available in **Core** sites and users must invoke their digital certificate to access E2E.

## Upload Document

To upload an encrypted document:

1. Open the encrypted document library.
2. Click **Add New Item**.
3. **Browse** to select the file.
4. Click **OK**.

The Data Encryption indicator presents and the file is encrypted and uploaded.



## Download Document

To download an encrypted document:

1. Working from the Encrypted Document Library, click the document you want to download.
2. The **Document Decryption** dialog box and the **Progress** dialogue box display.

**NOTE:** If the **Document Decryption** dialogue box does not open, you may need to turn off your pop-up blockers. To do this, go to **Tools > Pop-up Blocker > Turn Off Pop-up Blocker**.

3. Once the Document Decryption is complete, the **Save** and **Open** buttons, in the **Document Decryption** window, become active.

## MY PERSONAL WEBEX ROOM

Each user has a **Webex Personal Room** which provides access to all your scheduled WebEx meetings, the ability to join meetings, as well as launch instant meetings. You can access your WebEx Personal Room from the **User** dropdown menu at the top right of all ForumPass pages. Your ForumPass credentials are passed to WebEx.

The following options are available:

- **Attend a Meeting:** Enter meeting number and join a meeting in progress.
- **Host a Meeting**
  - **My Personal Room:** Click **Enter Room** to launch and host an instant meeting. From there you may invite participants and share content.
  - **Schedule a Meeting:** Add a meeting to your calendar. Invitees are notified via email.
  - **My Meetings:** Provides access to all your scheduled meetings.
  - **My Recorded Meetings:** Provides access to meetings you recorded.