



ForumPass Site Creation Participant Workbook

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EXOSTAR[®]

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DOCUMENT VERSIONS

Version	Change Overview	Date	Responsible Party
ForumPass 6.7	Formatting Updates	03/04/20	Ashleigh Howell



INTRODUCTION

This guide is intended to be used as a companion to the instructor-led ForumPass Site Creation webinar. The guide provides a high-level overview of the application, and then proceeds through detailed descriptions and step-by-step guidelines for creating a site within ForumPass.

For more detailed information on the ForumPass solution, please refer to the [ForumPass User Guide](#), or visit the [ForumPass Self-Help](#) page on my.exostar.com.

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>.

ORGANIZATIONAL SITE COLLECTION STRUCTURE

Upon becoming part of the ForumPass community of users, each organization is allocated space on ForumPass servers out of the Exostar Farm. This space contains your organization site collection, and is used by Site Creators to build out project site collections for collaboration.

There are some important things a Site Creator needs to consider when building the project site:

- To add users to your project site, the user must first be added to the top-level site in an organization. Typically, the user is added at that level as a Visitor. Once a member of your organization, the Site Creator can invite the user to the project site and assign appropriate permissions.
- As project sites are created within the organizational site collection, permissions are set to inherit from the parent site, by default. As you build your sites, you have the option to break inheritance and create unique permissions.

SITE COLLECTION PLANNING

Prior to building Site Collections, organizations should give careful consideration to the planning that needs to occur to ensure consistency of sites, which allows for easier end-user navigation.



Taxonomy

Taxonomy refers to how you structure and categorize your content and how users find information throughout the sites – much like a well-designed blueprint. There are three types of taxonomies:

- **Flat:** Listing of items, best suited for 30 or fewer objects.
- **Hierarchical:** Represented as a tree architecture; hierarchies are bi-directional, each direction has meaning.
- **Faceted:** Metadata is one type of facet in a faceted taxonomy.

It is important to recognize users think about and look for information in different ways. Some important items to consider when defining your taxonomy are:

- How to best structure your site and site components, such as sub-sites, lists, and libraries.
- How to best organize your data.
- Incorporate standard business practices, categorizations, and nomenclatures.

Taxonomy Best Practices

When designing taxonomy, organizations should keep in mind the following elements:

- **Ease-of-use:** Users want options, not complexity.
- **Quality:** Quality of metadata affects the quality of the taxonomy.
- **Scalability:** quality must increase as the taxonomy scales.
- **Consistency:** achieved better programmatically than by human intervention.
- **Persistency:** must be able to persist over time.

Scale Considerations

The following are limitations to consider when designing your taxonomy:

Supported Limits		
250,000	Sites	Number of sites per Site Collection
2,000	Nested Sub Sites	Number of sub sites nested under a site
30,000,000	Items	Number of items per list or library
5,000	List Views	Number of list or library items that can be displayed at a time
5,000	Blog Posts	Number of blog posts per site
500 MB	File Size	Maximum threshold for document file size
250 MB	Encrypted Document	Maximum file size for encrypted documents

SITES AND WORKSPACES

ForumPass sites and workspaces are web pages that provide the foundation for collaboration. Sites and workspaces can be used to support project planning activities, document lifecycles, task management, and information sharing. ForumPass sites are dynamic and interactive.

Common Templates

ForumPass provides different site templates during the site creation process. As you are completing the Site Creation Form, you can select the different tabs of templates for brief descriptions.

Project Collaboration Sites

- **Team Site:** Often the primary site and center of a project site collection. Team sites provide document libraries, announcement and task lists, calendars, and a discussion board.
- **Project Site:** Used to capture tasks and assign them to people in your organization, store and manage project-related documentation, and track project team events on a common calendar. Project sites provide an easy way to manage projects with similar collaborative features as the team site, and include the Project Summary web part.
- **Quick Start Template:** Custom template used as a primary site and center of a project. This template includes many of the same elements as the Team Site, as well as the integrated WebEx calendar enabled.

Information Sharing Sites

- **Community Site:** A place where members can discuss topics of common interest. Members can browse and discover relevant content by exploring categories, sorting discussions.
- **Blog Sites:** Allows a user to post ideas, observations, or expertise, then the site becomes a running commentary on the blog's subject matter.
- **Wiki Sites:** Similar to Wikipedia you find on the Internet, Wiki sites support the sharing and transfer of information and knowledge. Users can create and contribute to Wiki topics, and can create links to other Wiki topics.

Site Components

A ForumPass Project Site Collection is a group of related web pages containing content in support of a project. Containers, such as document libraries and lists, are used by members of the project in order to contribute ideas and content, as well as collaborate on other's work.

Project Sites may be comprised of a collection of the following:



- **Document Libraries:** Containers used for file storage and management; and support features such as folders, versioning, checkout, approval capabilities, and workflows.
- **Lists:** Containers available to facilitate communication and track information such as announcements, calendar, discussion boards, links, project tasks, issue tracking, and surveys.
- **Web Parts:** Components used to build your primary team site by providing visibility and access to featured containers. The team site is divided into Web Zones that allow the Site Creator to choose the location for the featured web part display.

Additional information to note about Lists and Libraries:

- Each list or library for use within a site has its equivalent Web Part in the gallery.
- Any number of lists or libraries of the same type can be used within a project; however, they each must have a unique name.
- All lists and libraries can be shared and have unique permissions.
- When lists and libraries are created, the user has the option to include a link to the content area in the Quick Launch Menu.

SITE CREATION

Now that we reviewed the basic structure of ForumPass and site planning, the following sections provide steps to create a project site.

Workspace Provisioning

The [ForumPass 6.6 Release](#) introduced the Site Provisioning Form, which is configurable for any sites created under your Organization Site Collection. The form provides specific information you want included in all sites under your collection.

Once site provisioning is activated, only SCAs and Site Administrators can see the **Create New Site** option under the **Settings** menu.

Activate Site Provisioning

To activate site provisioning:

1. Select **Site Settings** from the **Settings** dropdown menu (gear icon).
2. Under the Site Actions section, select Manage site features.
3. Activate ForumPass Workspace Provisioning, and the ForumPass Site Provisioning Request List automatically activates. Verify before proceeding.

Configure Site Provisioning Form

To configure the site provisioning form:



1. Select **Site Settings** from the **Settings** dropdown menu (gear icon).
2. Under the Site Collection Administrator section, select **Manage Workspace Provisioning**.
3. Select or deselect desired form options. Click **Next**.

NOTES:

- When **Approval Required** is enabled, a **Site Approvers** group is created to approve the new site requests. SCA is automatically added to that group and can add more users.
 - Site Approvers have permission to edit the **Site Provisioning Information List**.
 - The Site Provisioning Information List stores information provided on the workspace form. When approval is required, Site Approvers go to the list to approve the site.
 - Emails are sent to the person who requests the site creation, the primary/secondary owners, and the members of the **Site Approvers Group**.
 - When **Members Create Site** is enabled, **Approval Required** is automatically enabled.
 - When **Business Area** is enabled, a **Business Area List** is created.
 - Business Area List stores the Site Collection URLs and their corresponding titles.
4. Use the drop down menus to select the order you want each section displayed on the form.
 5. Click **OK** to complete form configuration.

Create your site

To create your site:

1. Go to the parent where you want to create your sub site.
2. Open the **Settings** menu (gear icon), and select **Create New Site** to redirect to the **Site Provisioning Form**.

NOTE: You can also navigate to the Site Contents page and select the **+new subsite** link.

3. Enter your **Site Name**. The name should be clear but succinct.
4. Enter a URL for the site. The first part is provided for you.

NOTES:

- The URL should consist of an abbreviated name to avoid the 255-character limit.
 - To avoid potential problems with updating or modifying the site, do not use special characters as part of the address: /, \, ., *, ?, ", <, >, |, #, \t, {, }, %. This also includes having spaces in the URL; spaces can create problems and therefore should not be utilized.
5. Select the desired **Site Template**.
 6. Add a **Description** of your site. (Optional)
 7. Permissions can be inherited from the parent site, or you may use unique permissions for this site. We recommend selecting **Use Unique Permissions**.

NOTES:



- If you choose to inherit permissions, you need to be a Site Administrator of the parent site in order to change permissions on this site in the future.
 - It is recommended you select Use Unique Permissions. You can change the permissions to inherit at a later time.
8. In the **Navigation Inheritance** section, specify whether you want the site to display the same top link bar as the parent. Select **Yes**.

NOTE: This setting also affects the navigation link to the parent site within the Navigation Folder path. If you click No, your sub-site will not contain the link to the parent site.

9. Select a **Primary Owner**, **Secondary Owner**, and **Additional Users** (this section creates the Owner, Members, and Visitors groups).
10. With all the settings designated, Click **Submit**.

GET STARTED WEBPART

Once you create a site, you can easily customize your site using the Get Started webpart. The following sections explain each tile in the webpart, which displays on the landing page of your new site.

Share your site

To add users via the Get Started webpart:

1. Click **Share**.
2. Enter the user name or email address.
3. Include a message to include in the email notification (optional).
4. Click **Share**.

Working on a deadline

Task lists and calendars help keep your project organized. To add a task list, timeline, and calendar to your site:

1. Click the **Working on a Deadline** tile from the webpart.
2. The **Working on a Deadline** page displays and presents two list offerings. Click **Add Them**.
3. The **Task List** and **Calendar** are added to your site.

Add Lists, Library, and Other Apps

A key means of information storage, tracking, sharing, and collaborating in ForumPass is achieved using Apps. ForumPass includes a variety of standard App templates and provides the ability to create custom Apps. Each App template is designed to allow maximum efficiency when working with particular types of documents.



You can use the Get Started webpart to add lists, libraries and other apps to your site. To add an app via the Get Started webpart:

1. Click **Add List, Libraries and other apps**.
2. On the **Site Contents** page, browse the available apps and select an app to add to the site.

NOTE: Click **App Details** for a detailed description.

3. Enter a name for the new list, library, or app you chose.

NOTE: Click **Advanced Options** to add a description and to define other options (depending on the type of app selected).

The new app is now listed in the Quick Launch menu.

Change the Look

The Change the Look setting allows you to change the fonts and color scheme for your site. Applying a theme does not affect your site's layout and does not change any individually themed pages. The theme can be applied to this site only, or you may choose to apply to this site and all inheriting subsites. To change the look:

1. Click **What's your style**.
2. Click the desired style template. The template page displays.
3. Click **Try it out** to impose the new style on your site.
4. If you would like to keep the changes, select **Yes, Keep It**. Otherwise, select **Not Quite There**.

Site Name, Description, Logo and Branding

This tile allow you to define descriptors for your site. You can change the name, description, URL and the logo associated with your site.

SETTINGS MENU

As the administrator of a site, you can access the Settings menu (gear icon located next to your User Access Menu), to further manage your site settings, permissions, and content. Please see the following Settings options:

- **Shared with...:** Opens a dialogue box displaying all users with whom them site has been shared.
- **Edit page:** Opens the current page in edit made and allows you to customize the page layout.
- **Add an app:** Provides a list of apps available to add to your site.
- **Site contents:** Redirects to the Site Contents page, listing all content containers associated with the site.

- **Change the look:** Allows you to choose from different fonts and colors for your site. This does not change the layout of your site.
- **Site settings:** Opens a comprehensive list of site management options, broken up into categories.
- **Getting started:** Opens a **Get started with your site** page, providing different tiles to help you set your new site up.
- **Invite by Email:** Allows you to invite users to access your new site. These users must have ForumPass accounts.
- **View Audit History:** Allows you to view audit history for this site for the past thirty days.
- **View Access History:** Lists all users who have access to this site and indicates last date/time of access.
- **View User Permissions:** Lists permissions for all users with access to this site. The user permissions pages displays the list of users and their permissions and rights.
- **View Request Tracking:** Provides the request log for the site for the last 30 days.
- **View Rights Management Activity Report:**

Edit Page

You can modify the content displays, or web parts, featured in the main content area (center of the page) of your team site. You can choose to add additional web parts, remove, or reorder existing web parts.

To modify the web parts:

1. From the **Settings** menu, select **Edit Page**.
2. To add a web part, go to **Insert** and select **Add a Web Part**. A list of web part categories displays.
3. Within the **Part** category, select the desired web part.
4. Click **Add**. Then click **Save**.

NOTE: To edit an existing web part on the page, click the down arrow in the upper right corner of the web part. You must hover over the web part to invoke the arrow.

SITE SETTINGS

There are many default settings associated with your new site. In order to access, review, and modify the various settings options, access the Site Settings page.

To access the full list of site settings, open the **Settings** menu and select **Site Settings**. Settings options are grouped in categories as follows:



Look and Feel Settings

The Look and Feel section allows you to modify site attributes and navigational options, change color schemes, and save the site as a template.

Navigation

Allows you to specify the items you want displayed in the navigation link bars of the site:

- **Global Navigation** specifies if this site displays the same tabbed navigation as the parent site.
- **Current Navigation** provides inheritance options regarding the Quick Launch menu. Your site may display the same navigation as the parent site, sibling sites, or neither.
 - **Sub sites and Pages** show in the navigation area. All newly create subsites will be added, and you can hide individual sites as desired.
- **Sorting** allows you to define how the Quick Launch menu items sort.
- **Navigation Sorting** allows you to modify and reorder the navigation items displayed in the Quick Launch menu.
- **Show and Hide Ribbon** allows you to specify whether the user has access to the Show Ribbon and Hide Ribbon commands.

Site Actions Settings

The Site Actions section allows you to modify site features, reset to site definition/defaults, and delete the site.

Manage Site Features

The Manage Site Features page allows you to activate or deactivate several features within the project site. Many of these features are activated by default when the site is created.

One commonly accessed feature is the WebEx Meetings option. A WebEx Meeting Center feature must be activated in order to integrate the WebEx functionality into your site collection. There are two available WebEx features:

- **WebEx Meeting Center Advanced:** Enables WebEx within the project site collection and creates one custom list in the site: Advanced WebEx Calendar list. This list provides the ability for users to create and manage team events and WebEx meetings, and host instant meetings.

NOTE: Activating this feature may add the Host Instant Meeting option to the toolbar of existing WebEx meeting lists.

- **WebEx Meeting Center Restricted Audience:** Enables WebEx in a sensitive or restricted project site collection and creates one custom list in the site: Restricted Audience WebEx Calendar list. This feature can only be enabled in Sensitive and Restricted project sites, and all meeting content transmission will be encrypted. In addition, meetings managed



within the Restricted Audience WebEx Calendar list require all participants be authenticated in ForumPass in order to host or participate in the events.

Site Administration

This section is specific to Site Administrators and provides site configurable options.

Regional Settings

Regional Settings are the Time Zone Settings for your site. You can modify the regional settings, as well as:

- Set the **Locale** to specify the way the site displays numbers, dates, and time.
- Specify the **Sort Order**.
- Select the **Time Zone**.
- **Set Your Calendar** to specify the type of calendar to be used.
- If desired, **Enable an Alternate Calendar** to be used as a secondary calendar.
- Define your **Work Week**.
- Specify the **Time Format**: 12 hour or 24 hour.

After you change all applicable settings, click **OK**.

Content and Structure

This page allows you to see, in Tree View, the complete hierarchy of your site collection and also allows you to navigate between sites and site content.

Site Users and Permissions

As you recall, upon creation of a site, three default user groups were established: **Visitors**, **Members**, and **Owners**. However, you may want to create additional user groups in order to manage unique permissions for those groups of users.

When working within the Site Permissions, the Site Administrator can manage permissions as follows:

Create New Permission Group

To create a new permission group:

1. Select **Site Permissions**.
2. Click **Create Group**.
3. Enter a name for the permission group, and designate the group owner and settings.
4. Assign the appropriate permission level for the group.
5. Click **Create**.



Repeat these steps to create additional permission groups required for your project.

Manage Group Permissions

To modify permissions associated with a group of users:

1. From the **Settings** menu, select **Site Settings**. The Site Settings page displays.
2. Select **Site Permissions**.
3. Select the group you want to modify.
4. Click **Edit User Permissions**. To remove the group, click **Remove User Permissions**.
5. Select the appropriate permission level for the group.
6. Click **OK**.

Add a User to a Permission Group

To add a user to a permission group:

1. From the **Settings** menu, select **Site Settings**. The Site Settings page displays.
2. Select **Site Permissions**.
3. Click the name of the group you want to modify.
4. Select **New**, then **Add User**.
5. Enter the name or email address of the new user.

NOTE: Optionally, enter a message to include in an email notification. Select **Show Options** to disable the automatic email message delivery.

6. Click **Share**.

Invite By Email

In addition to managing permissions via the site permissions page, ForumPass offers the Invite by Email option allowing you to invite users to join the site, and to grant permissions within a site permissions group. To invite by email:

1. From the **Settings** menu, select **Invite By Email**. The **Invite Users** page display.
2. Enter the email address of the user. Click **Look Up**.
3. Place a checkmark next to the user name.
4. Choose the permissions you want to assign the user.
5. Optionally, enter a personal message to include in the email notification sent to the user.
6. Click **OK**.

LIST/LIBRARY SETTINGS

Each list and library incorporated in your project site has a variety of settings reviewed and modified to best suit the needs of the project. The settings are available from within each List/Library app. To access list or library settings:



1. Open the List or Library.
2. Click on the **List/Library Toolbar**.
3. Click the **List Settings** or **Library Settings** icon located at the far right of the ribbon.

NOTE: You can also access many of the settings available from the settings page directly from the ribbon icons.

General Settings

The General Settings area governs how a library is configured, including title, description, and navigation. It is also the area where you can determine versioning settings.

List Name, Description and Navigation

This page allows you to change the name of the library, as well as update the description of the library. The **Navigation** section allows you to designate whether the document library displays on the Quick Launch menu.

Versioning Settings

Versioning is defaulted to OFF, and must be manually enabled in each library you wish to have versioning. It can be enabled within document libraries for all file types stored in libraries. With versioning enabled:

- You can see when an item or file was changed and who changed it.
- You can see when properties or other information about the file were changed.
- You can view previous versions, or restore a previous version as your current version.

Libraries can track both major and minor versions, while lists can track only major versions. Lists and libraries can also limit the number of versions stored. The default settings for the Shared Document Library do not include versioning. You have the following options on the Version Settings page:

- **Content Approval:** Allows you to require all new or updated content in the library be approved before made available in the Library. Items remain with a Pending status until the approval is complete, at which time the status is changed to Approved.
- **Document Version History:** Allows you to turn versioning on in the library. You can also set the type of retained versions– Major or Major and Minor – and you can limit the number of retained versions.

NOTES:

- The maximum number of retained versions is 50,000.
- If you limit the number of stored versions, the oldest version is permanently deleted when the limit is reached.



- If you delete the actual file, all its versions are deleted with it. By default, when you delete a version, the version is sent to the Recycle Bin, where it can be recovered until it is permanently deleted.
- **Draft Item Security:** Used with the Content Approval Setting. If a library requires approvals, you can set who can see the draft versions of the items before they are approved.
- **Require Check Out:** Allows you to require an item be checked out before it can be modified.

NOTE: If the **Require Check Out** option is set to **Yes**, and a user completes a multiple file download, all the files are marked as checked out and individually have to be checked back in.

Permissions and Management Settings

The Permissions and Management settings govern how document content is managed.

Delete this Document Library

This option moves the library and all its contents to the Site Recycle Bin.

Save Document Library as Template

With proper permissions, you may choose to save the list or library as a template to be reused to create additional containers. Templates are stored at the Organization's site collection level. It is important to note, each library and list must have a unique name.

Permissions for this Document Library

By default, lists and libraries are set to inherit permissions from the parent site. But, sometimes a library may require a different set of permissions than the rest of the site. For example, a document library containing sensitive information should not be shared with everyone who has access to the site.

List/Library permissions are managed similarly to how site permissions are managed, with permission inheritance, permission groups, and permission levels.

Workflow Settings

Workflows automate processes by breaking them into a set of steps users must take to complete a specific business activity, such as approving content, collecting feedback, or sending a notification.

Site templates include the OOTB SharePoint workflows: **Approval**, **Approval with Notification**, and **Notification**.



In order to add additional workflows to a document library, go to the **Library Settings** page, and access the **Workflow Settings** option.

1. Click **Add a Workflow**.
2. Select a workflow template to use and enter a name for the new workflow.
3. Select the task list to use for the tasks associated with this workflow and select the history list to use to store the workflow history.
4. Select the desired ways this workflow can be started. Click **Next**.
5. Optionally, predefine several attributes for your new workflow including:
 - a. To whom the workflow is assigned
 - b. Request messaging
 - c. Due Dates, durations for the tasks
 - d. Individuals to be cc'ed on the tasks/workflow activity
 - e. Completion activities
6. Click **Save**.

The new workflow is now available for use within the library.

Columns

A column is an element of information that describes an item on a ForumPass site, also considered a file property. Columns provide a way to further define and organize information beyond what is available via titles or folders. Columns can be easily added or modified.

Add New Column

To add a column of information in a list/library:

1. From the **List/Library Settings** page, click **Add from existing site columns**.
2. Select the column from the list of available columns. Click **Add**.
3. Choose if you would like this column of information to display on the default view of the list/library.
4. Click **OK**.

Create New Column

To create a new column:

1. From the **List/Library Settings** page, click **Create Column**.
2. Enter a name for the new column.
3. Select the type of information to store in this column.
4. Provide a column description.
5. Further define the column details and parameters.

NOTE: These options are dependent on the type of information column selected above.

6. Choose if you would like this column of information to display on the default view of the list/library.



7. Click **OK**.

Views

A view can be used to display information within a library or list in different ways. Some views display all items, while others show specific items based on their properties or metadata values. ForumPass views can be customized and used to quickly find relevant information.

Modify Existing View

To modify an existing view:

1. From the **List/Library Settings** page, scroll to the **Views** section.
2. Click the **Name** of an existing view. The **View Details** page displays.
3. Modify the view as desired. You can change the name and the column ordering and sort order for the view.
4. Click **OK**.

Create New View

To create a new view:

1. From the **List/Library Settings** page, scroll to the **Views** section of the page, and click **Create View**.
2. Select the type of view you would like to use.

NOTE: Optionally, choose to start with an existing view if you would like to use that as a foundation for the new view.

3. Enter a **View Name**, define the view audience, and select the columns of information to display.
4. Use the **Sort and Filter** options to define how the view is sorted and what data is used for filtering, if any.
5. Click **OK**.

The new view is now available as an option within the List/Library.

For additional information on ForumPass functionality, please see the ForumPass Self-Help page on my.exostar.com.