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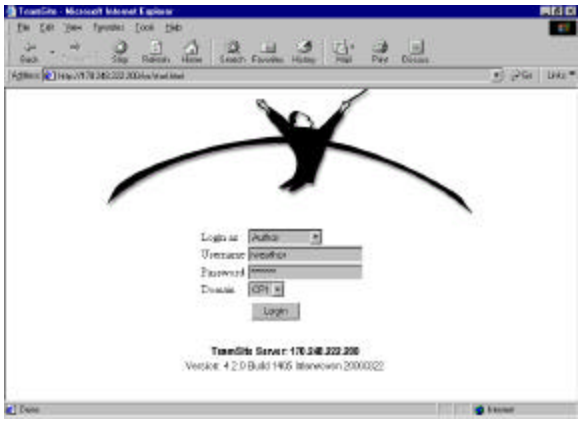
Accessing TeamSite

Lesson 1: Logging into TeamSite

1. Click your TeamSite Browser Icon. This will be either **Microsoft Internet Explorer** or **Netscape**. The following screen appears:



Note: Steps 2-6 will be done from the screen shown above:

2. Click the **Login as Pull Down Menu** and select your user type (i.e. author, editor, or administrator).

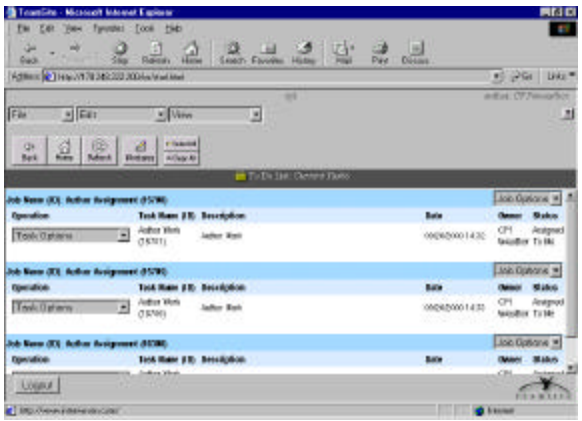
3. Enter your **Username** in the **Username Name Field**.

4. Enter your **Password** in the **Password Name Field**.

5. You don't have to change the Domain.

6. Click the **Login Button**.

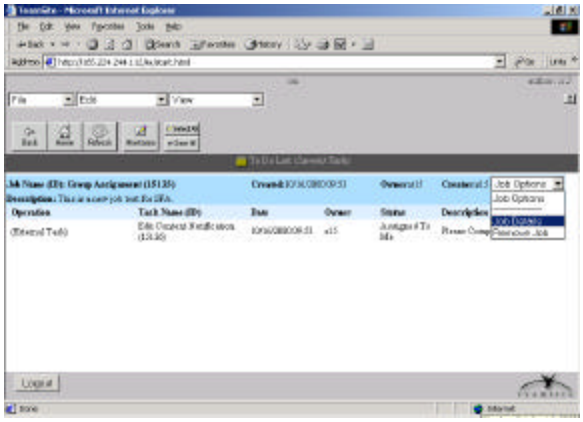
7. After clicking the **Login Button**, the TeamSite **To Do List** screen appears below: (**Note:** This setting displays the **To Do List** as the Home Page).



Viewing Your Work

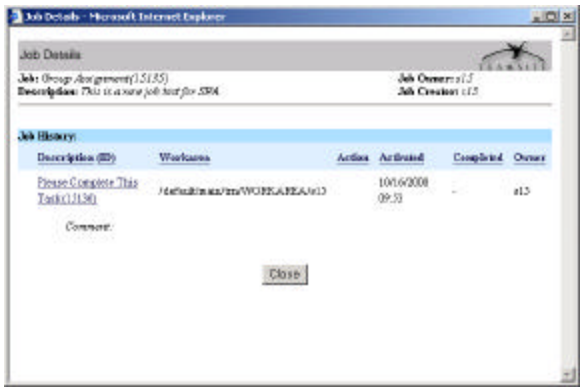
Lesson 2: Checking your To Do list

1. After Logging in as an **Author**, the TeamSite **To Do List** will appear as shown below:

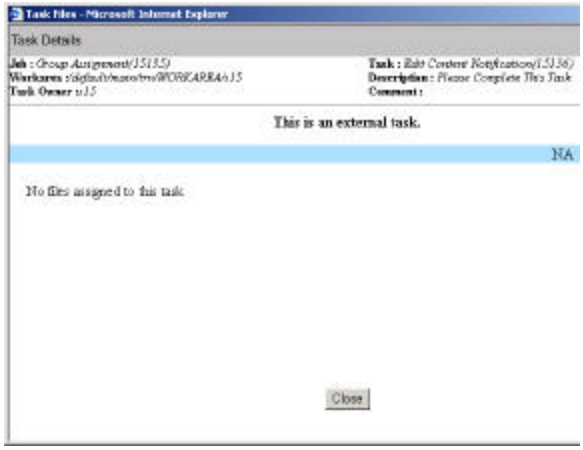


2. The **To Do List** displays a **Job Options Pull Down Menu**, on the *right* side of the screen. You can see this Pull Down Menu on the screen shown above. This menu allows you to obtain further information on Tasks.

3. To view information about the task, click the **Job Options Pull Down Menu** on the *right* side of the screen and click **Job Details.** A **Job Details Window** will appear as shown below:



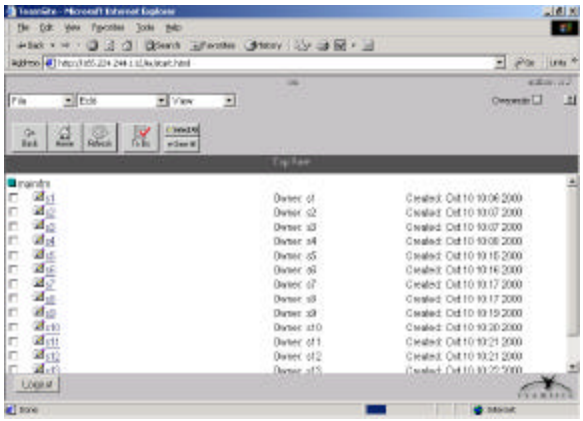
4. You can click the **Job Link** (which will have a 5 digit number next to it) in this Window to see additional information concerning your task. This will open the screen below:



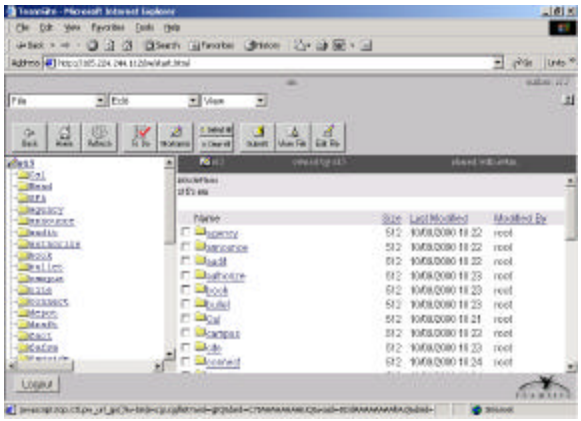
Adding Content to IFAP / Schools Portal

Lesson 3: Creating a New Data Record Using Templates

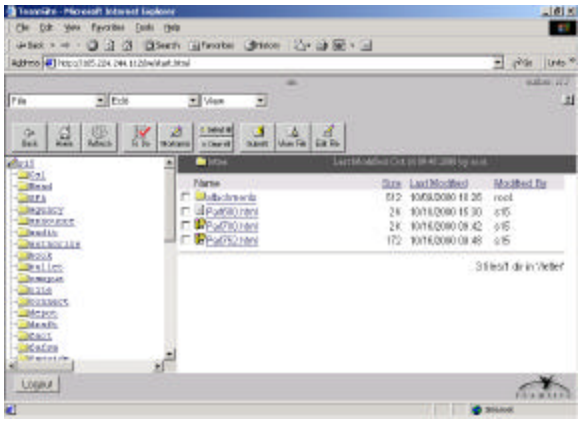
1. After logging in as an **Author** or *higher*, make sure your TeamSite directories are displayed on the *left* side of the screen by clicking the **Workarea Button** that is *directly below* the **Edit Pull Down Menu**. If the **Workarea Button** *is not displayed*, your TeamSite directories should already be displayed. The following screen appears:



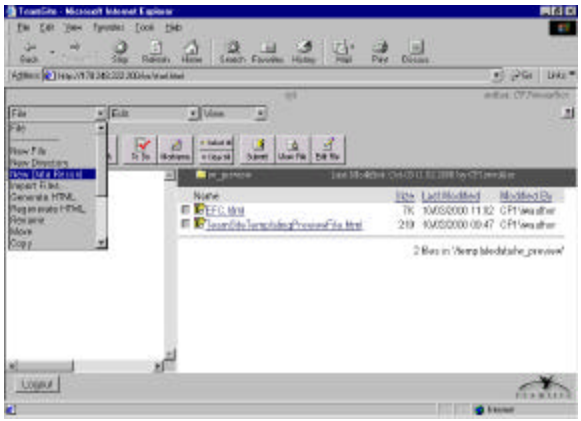
2. Click the directory on the *left* side of the screen you want to go to. For this exercise, click your **Student #**. The following screen appears:



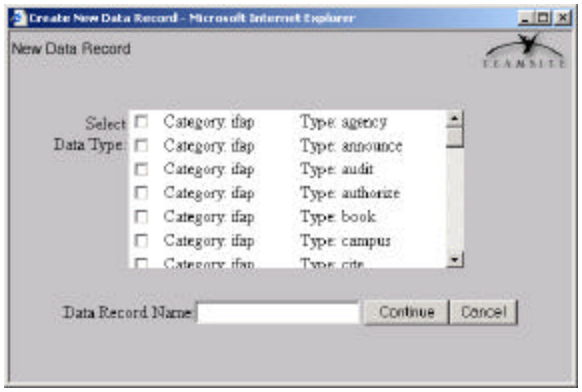
3. Depending on the directory structure, you might have to *navigate* to the appropriate directory where your File is located. For this exercise, click the **Letter Dir**ectory on the *left* side of the screen. The following similar screen appears:



4. To create a **New Data Record,** click the **File Pull Down Menu.** This following screen appears:

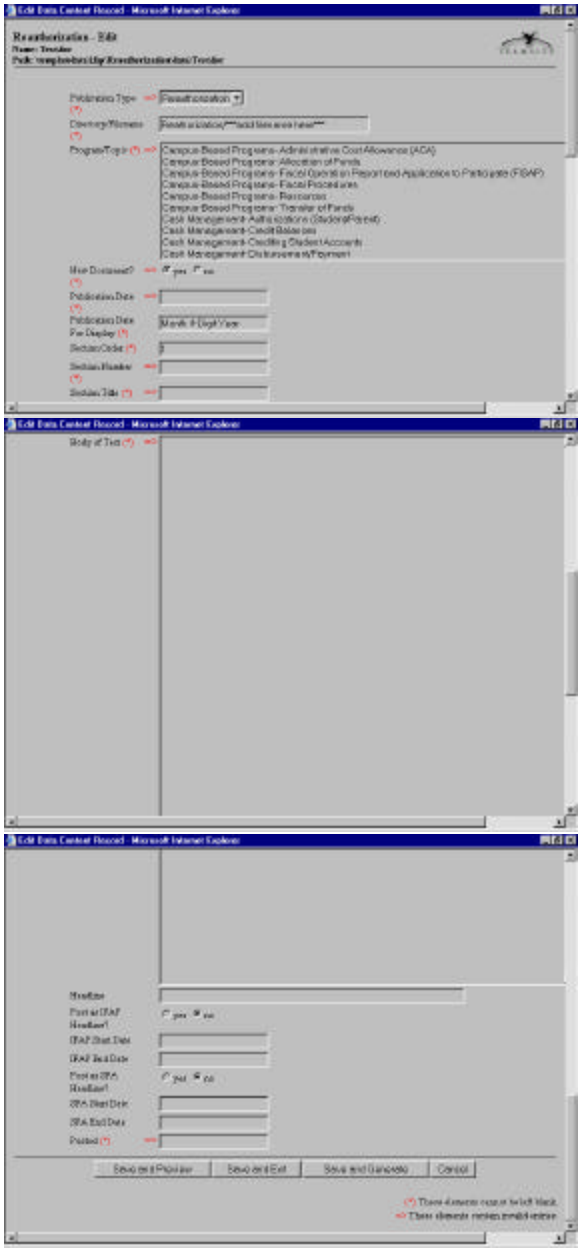


5. Click **New Data Record**. The following screen appears:



6. Click the **Select Data Type Checkbox** that corresponds to the appropriate Template. For this exercise, click the **Checkbox** next to the **letter Template** and type the **File Name** *Part500* in the **Data Record Name Field**.

7. Click the **Continue Button**. Your screen appears similar to the one(s) below:



8. Type the File Name in the **Directory/Filename Field**. Use the **Backspace key** to *erase* the *****add filename here***** text in the **Directory/Filename Field** and type your **Filename**. For this exercise, type *Part500* for your Filename.

9. Select the **Campus-Based Programs – Administrative Cost Allowance (ACA) topic** for the ***Program/Topic Field***.

10. Select the **Yes Button** for **New Document**.

11. Make sure the **Publication Date Field** contains the following format: two digit month, two digit day, and four digit year such as **10/31/2000** which indicates **October 31st, 2000**. For this exercise, type **10/31/2000**.

12. In the **Publication Date For Display Field**, type **October 2000**. **Note:** This is the only **Date Field** where you will type the **Month** and **Year** instead of the **two digit** month, day, and **4 digit** year.

13. The **DCL Type Field** contains a **Pull Down Menu**. Select **GEN** in this menu.

14. Type **1** in the **DCL No Field**.

15. Type **1** in the **DCL ID Field**.

16. Click the **No Button** in the **Action Letter Field**.

17. Leave the **Award Year and Action Letter Number Fields** blank.

18. You can type anything you want for a Summary. For this exercise, type **Part500 New File** in the **Summary Field**.

19. Type **Part500 New File** in the Body of **Text Field** for this exercise.

20. Leave the **Label**, **Link**, and **Headline Fields** blank.

21. Select the **No Button** for **Post as IFAP Headline**.

22. Leave the **IFAP Start Date** and **IFAP End Date Fields** blank.

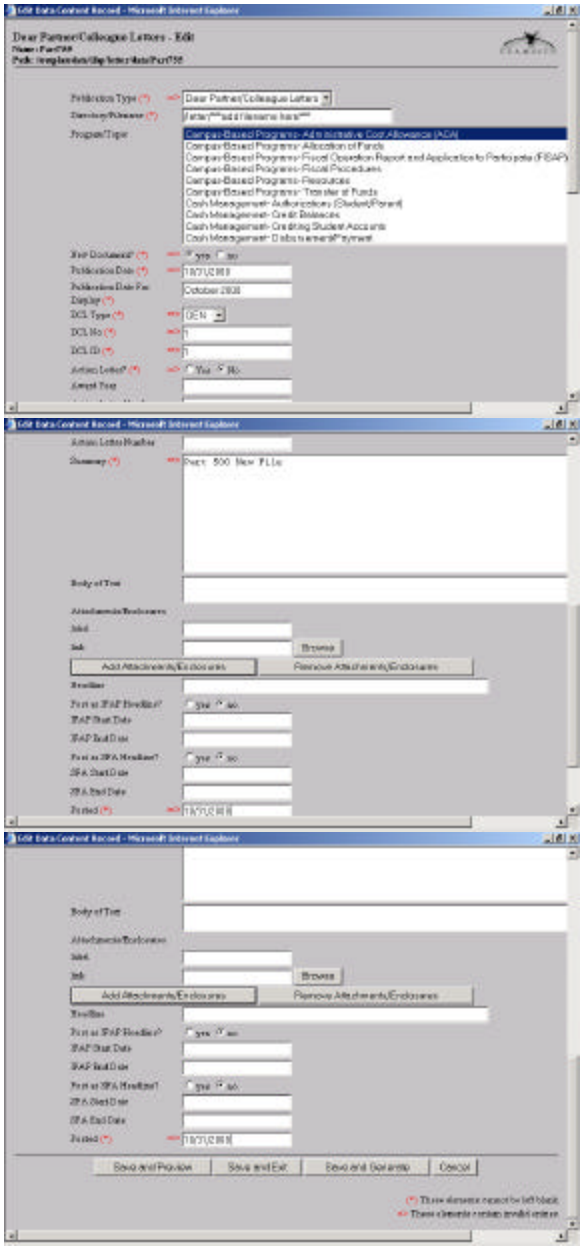
23. Select the **No Button** for **Post as IFAP Headline**.

24. Leave the **SFA Start Date** and **SFA End Date Fields** blank.

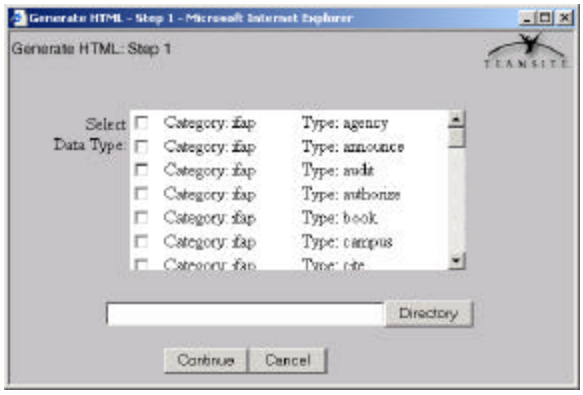
25. Type **10/31/2000** in the **Posted Field** for this exercise.

Note: The (*****) in certain Fields means (these elements cannot be left blank). The (**=>)** symbol indicates (these elements contain invalid entries).

26. After filling in all required fields, your screen appears below:



27. Click the **Save and Generate Button**. The following screen appears:



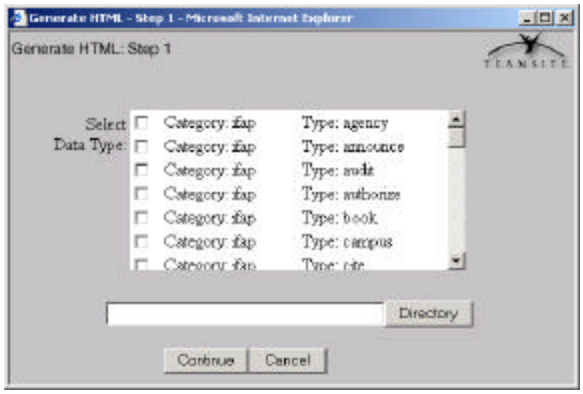
28. You have just created a **New Data Record** and are ready to **Generate an HTML document**. Lesson # 4 will describe the procedures to complete the HTML document.

29. **Leave the above screen open so you can bypass step 1 in Lesson 4**.

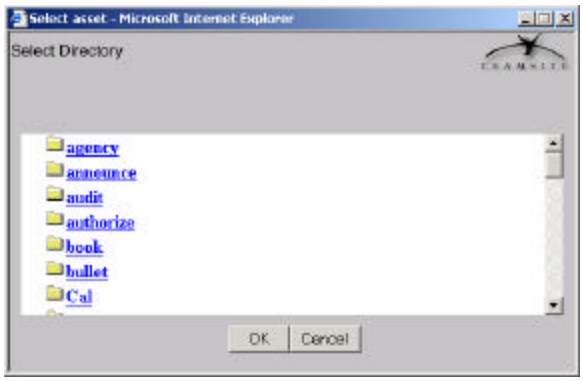
Generating HTML

Lesson 4: Generating HTML

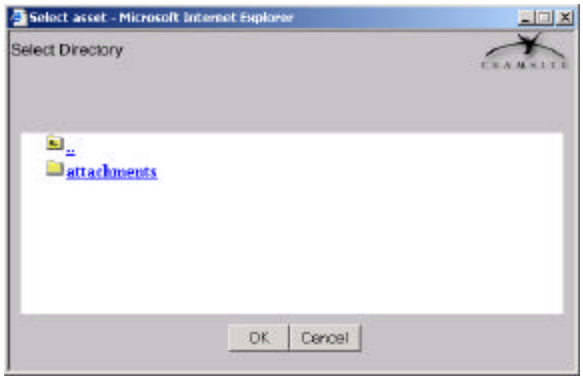
1. Follow the above **Lesson 3 Steps 1-27**. The following **Generate HTML: Step 1** screen appears from the previous exercise, don't close this screen.



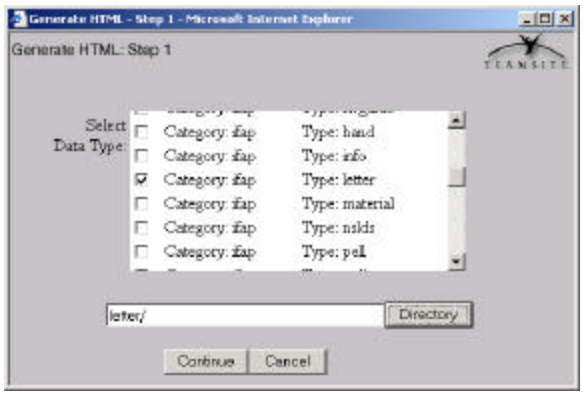
2. Scroll down and **Select the letter Checkbox** if it's not already checked. Click the **Directory Button**. The following screen appears:



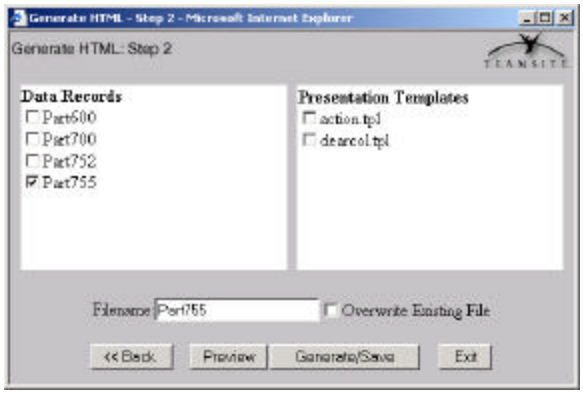
3. Scroll down and click the **Letter Directory Link**. The following screen appears:



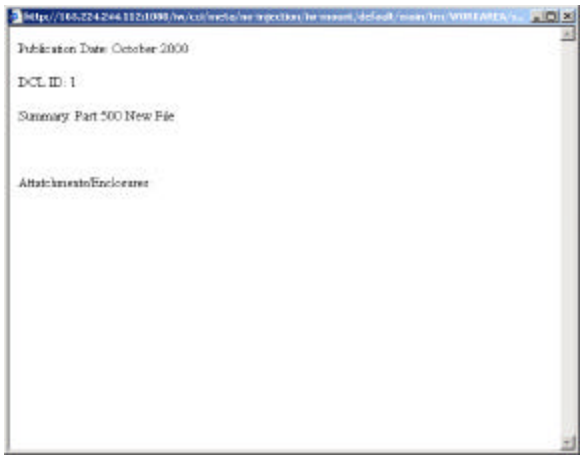
4. Click the **OK Button**. The following Generate HTML: Step 1 screen appears:



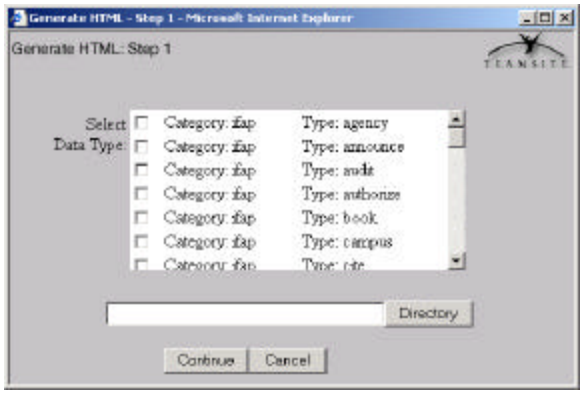
5. Click the **Continue Button**. The following Generate HTML: Step 2 screen appears:



6. Click the **dearcol.tpl Checkbox** and click the **Save/Generate Button**. The following screen appears:



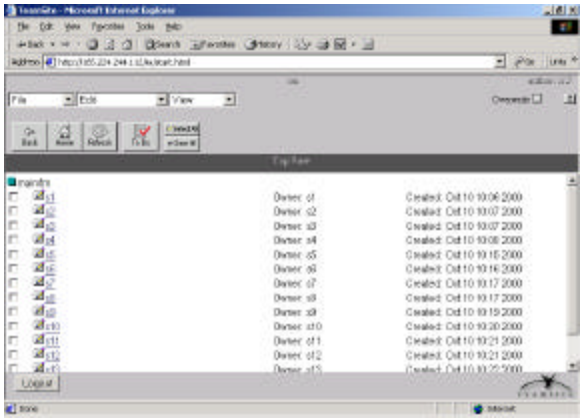
7. You just completed the steps to Generate an HTML (IFAP) document. Close all Windows that were opened to Generate the HTML document and click the **Refresh Button** in TeamSite.



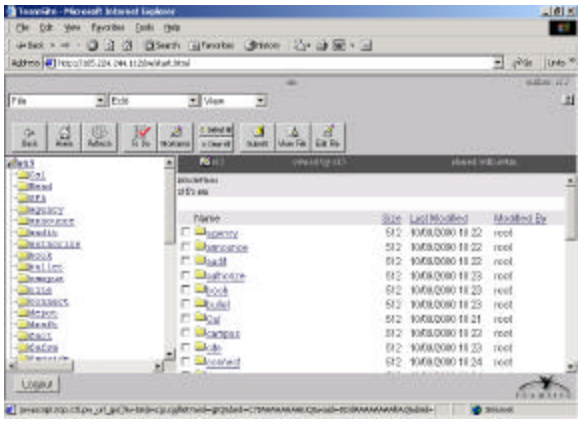
Posting Your Files to IFAP / Schools Portal

Lesson 5: Posting Your Files to IFAP / Schools Portal

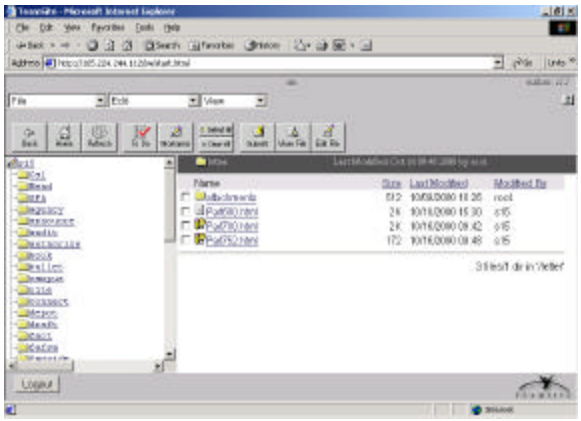
1. After logging in as an **Author** or *higher*, make sure your TeamSite directories are displayed on the *left* side of the screen by clicking the **Workarea Button** that is *directly below* the **Edit Pull Down Menu**. If the **Workarea Button** *is not displayed*, your TeamSite directories should already be displayed. The following screen appears:



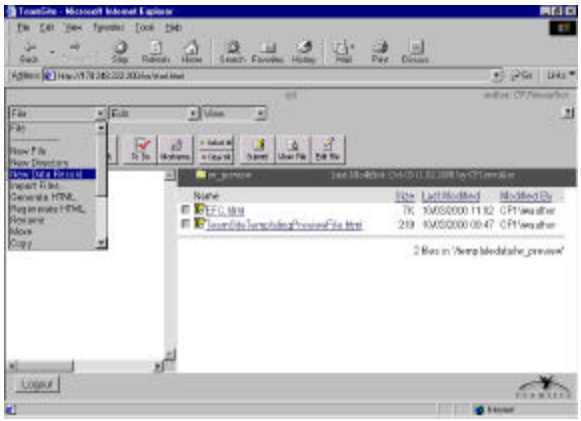
2. Click the directory on the *left* side of the screen you want to go to. The following screen appears:



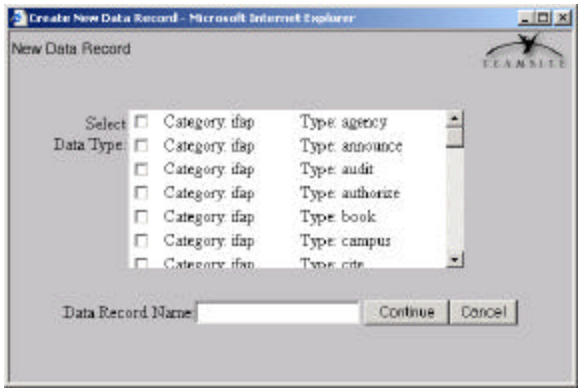
3. Depending on the directory structure, you might have to *navigate* to the appropriate directory where your File is located. For this exercise, click the **Letter Dire**ctory on the *left* side of the screen. The following similar screen appears:



4. To create a **New Data Record,** click the **File Pull Down Menu.** This following screen appears:

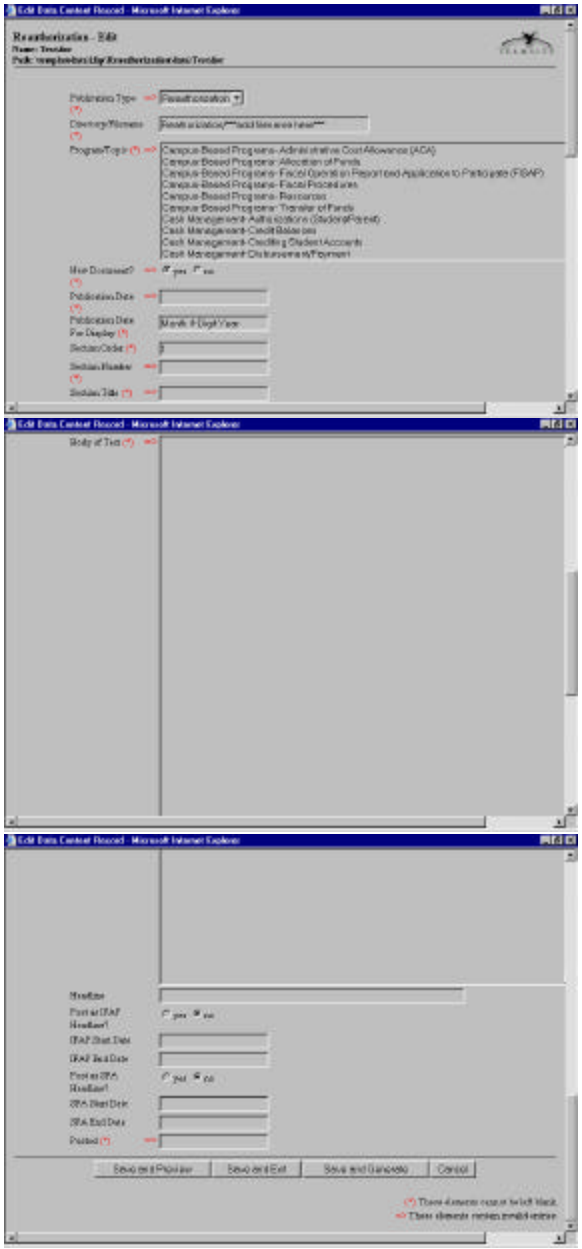


5. Click **New Data Record**. The following screen appears:



6. Click the **Select Data Type Checkbox** that corresponds to the appropriate Template. For this exercise, type the **File Name** *Part500* in the **Data Record Name Field** and *scroll down* and select the **Checkbox** next to the **letter Template**.

7. Click the **Continue Button**. Your screen appears similar to the one(s) below:



8. Type the File Name in the **Directory/Filename Field**. Use the **Backspace key** to *erase* the *****add filename here***** text in the **Directory/Filename Field** and type your **Filename**. For this exercise, type *Part500* for your Filename.

9. Select the **Campus-Based Programs – Administrative Cost Allowance (ACA) topic** for the ***Program/Topic Field***.

10. Select the **Yes Button** for **New Document**.

11. Make sure the **Publication Date Field** contains the following format: two digit month, two digit day, and four digit year such as **10/31/2000** which indicates **October 31st, 2000**. For this exercise, type **10/31/2000**.

12. In the **Publication Date For Display Field**, type **October 2000**. **Note:** This is the only **Date Field** where you will type the **Month** and **Year** instead of the **two digit** month, day, and **4 digit** year.

13. The **DCL Type Field** contains a **Pull Down Menu**. Select **GEN** in this menu.

14. Type **1** in the **DCL No Field**.

15. Type **1** in the **DCL ID Field**.

16. Click the **No Button** in the **Action Letter Field**.

17. Leave the **Award Year and Action Letter Number Fields** blank.

18. You can type anything you want for a Summary. For this exercise, type **Part500 New File** in the **Summary Field**.

19. Type **Part 500 New File** in the Body of **Text Field** for this exercise.

20. Leave the **Label**, **Link**, and **Headline Fields** blank.

21. Select the **No Button** for **Post as IFAP Headline**.

22. Leave the **IFAP Start Date** and **IFAP End Date Fields** blank.

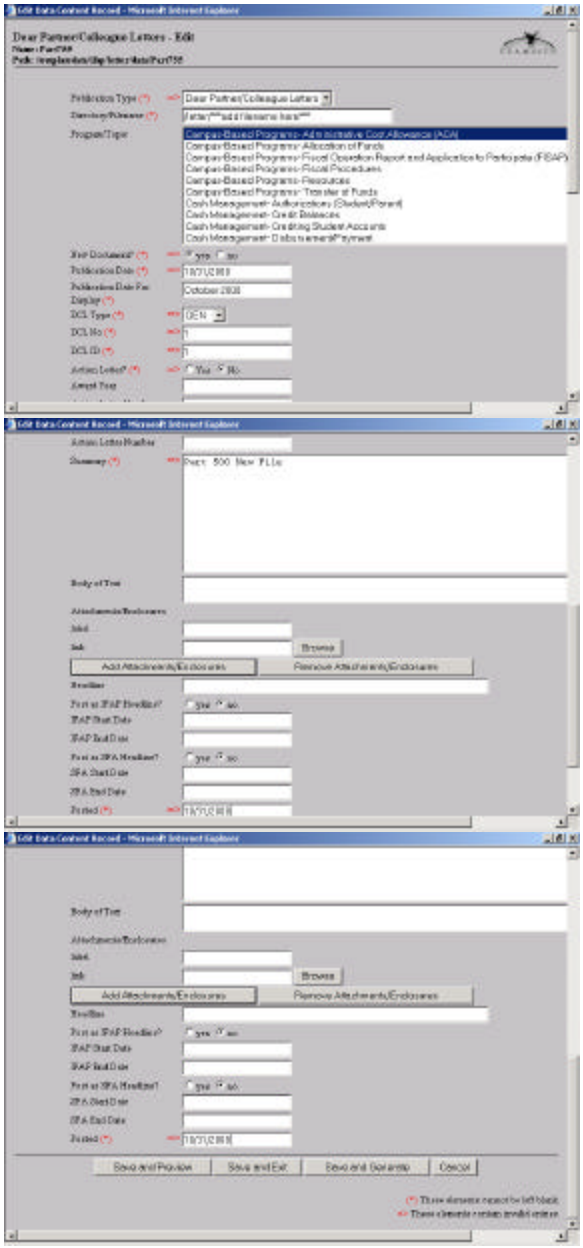
23. Select the **No Button** for **Post as IFAP Headline**.

24. Leave the **SFA Start Date** and **SFA End Date Fields** blank.

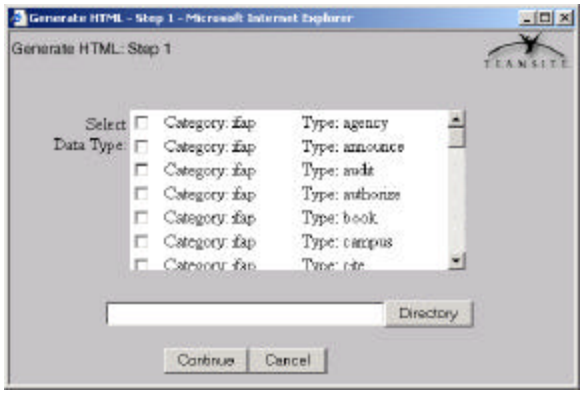
25. Type **10/31/2000** in the **Posted Field** for this exercise.

Note: The (*****) in certain Fields means (these elements cannot be left blank). The (**=>)** symbol indicates (these elements contain invalid entries).

26. After filling in all required fields, your screen appears below:

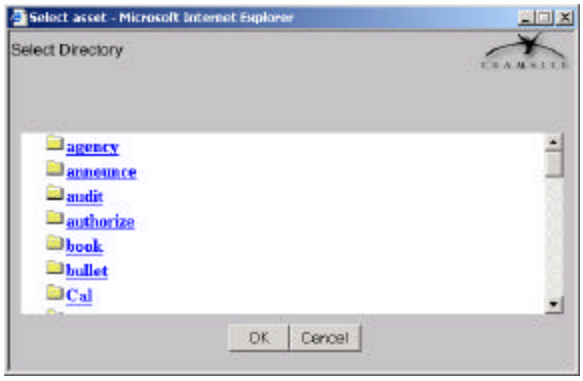


27. Click the **Save and Generate Button**. The following screen appears:

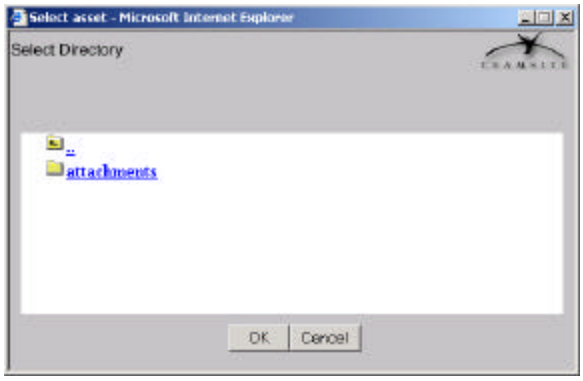


28. You have just created a **New Data Record** and are ready to **Generate an HTML document**.

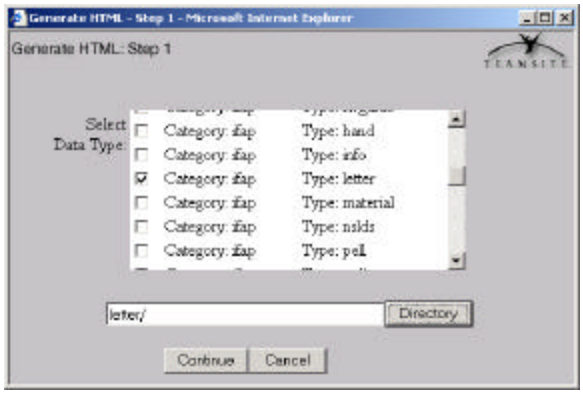
29. Scroll down and **Select the letter Checkbox** if it's not already checked. Click the **Directory Button**. The following screen appears:



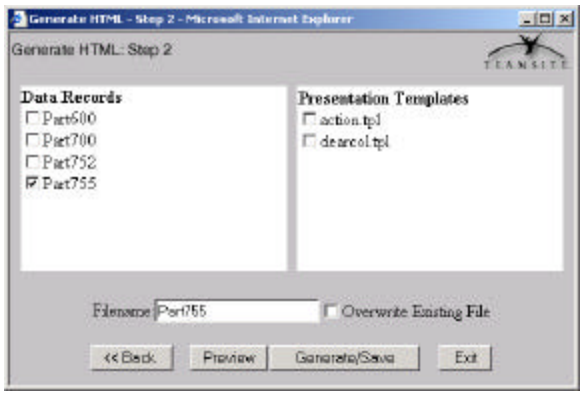
30. Scroll down and click the **Letter Directory Link**. The following screen appears:



31. Click the **OK Button**. The following Generate HTML: Step 1 screen appears:



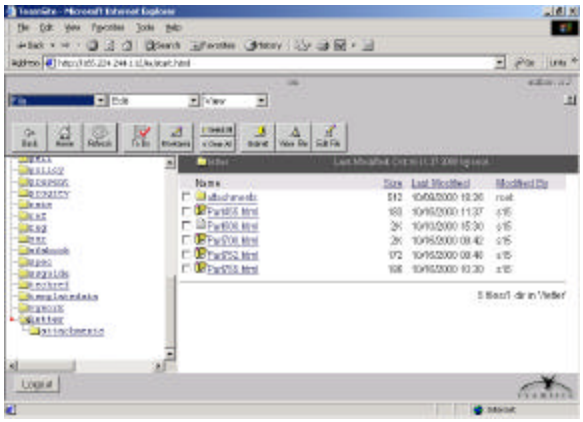
32. Click the **Continue Button**. The following Generate HTML: Step 2 screen appears:



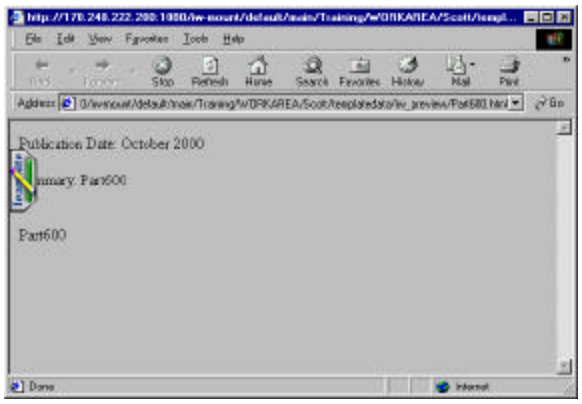
33. Click the **dearcol.tpl Checkbox** and click the **Save/Generate Button**. The following screen appears:

34. Close all Windows that were opened to Generate the HTML document.

35. **Navigate** to the Directory where the **Part500** HTML document you just generated. The following screen appears with the **Part500 File** you generated:

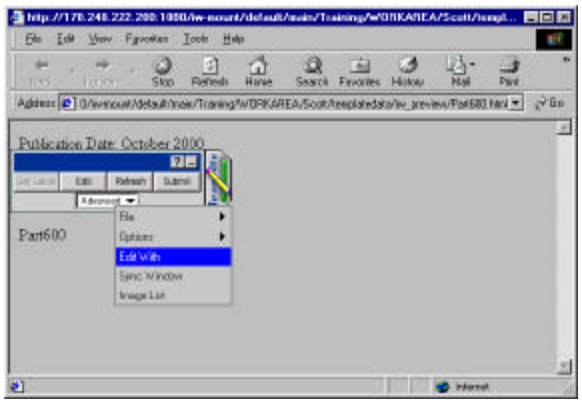


36. Click the **Part500 File** to open it. The following screen appears:

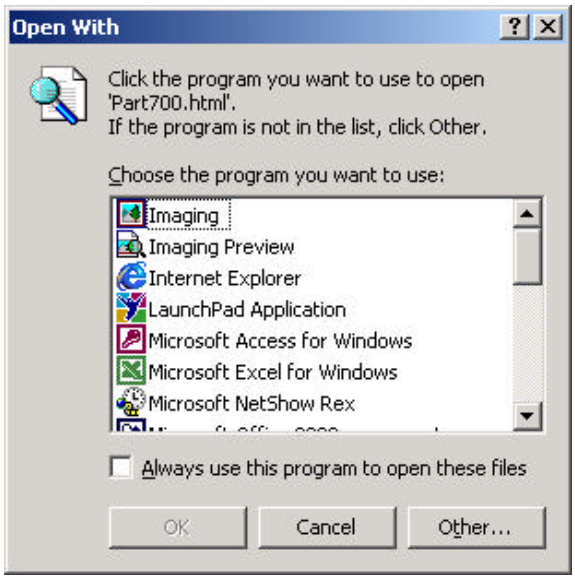


37. After you Open the File, only a portion of the SmartContext Editing Tab might be displayed; if just a portion of the Tab is displayed, click it to display the entire Tab. The following screen appears:

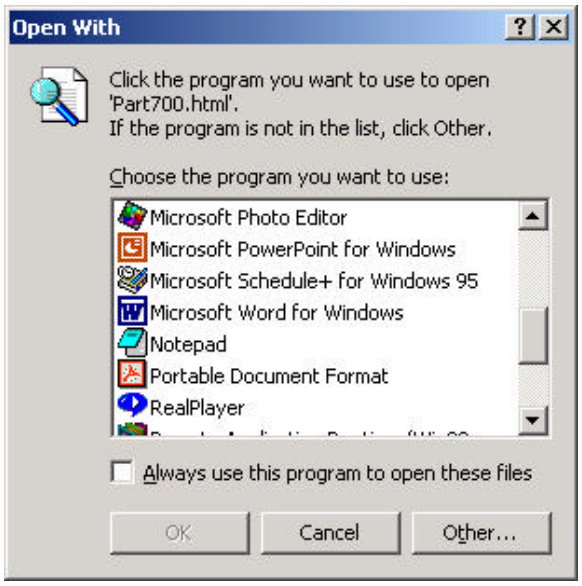
38. To **Copy** another File into this document, click the **Advanced Pull Down Menu** on the **SmartContext Editing Tab**. The following screen appears:



39. Click **Edit With**. The **TeamSite LaunchPad Window** will open and be *minimized* and the **Open With Window** will also open. The following screen appears:



40. Scroll down until you see the **Microsoft Word for Windows Icon**. The following screen displays the **Microsoft Word for Windows Icon**:



41. **Double Click** the **Microsoft Word for Windows Icon** to open the **Part500 File** in Microsoft Word. The document will be opened and displayed on your screen.

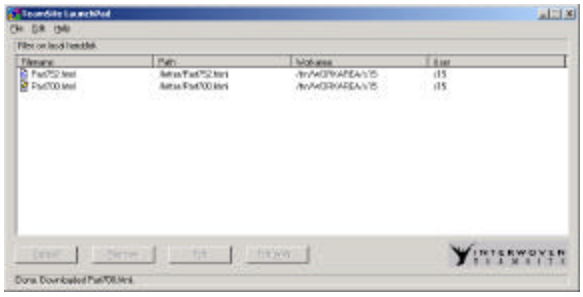
42. Open your Microsoft Word document that you want to copy into the **Part500 File** you just opened. Note: for this exercise, I placed a file in the Content Management directory. I'll cover the procedures to open the file in class.

43. Copy the first page from the Microsoft Word document you just opened from the Content Management directory.

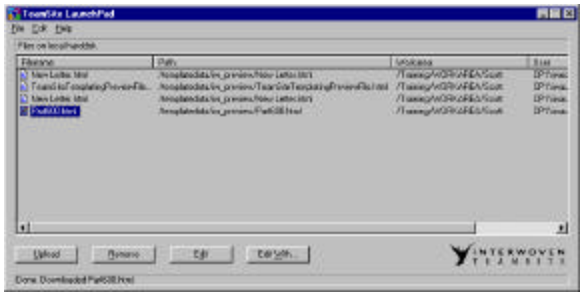
44. Maximize the **Part500 File** and **Paste** the document you copied to the **Part500 File** *directly below* where the document shows **Summary: Part500**.

45. **Save** and **Close** the **Part500 File** by clicking the **Save Icon** in Microsoft Word. Don't worry about identifying where the File will be saved, the following steps will cover this procedure. You can also close the file you opened from the Content Management directory.

46. Maximize the **TeamSite LaunchPad Window**. A screen appears similar to the one below:



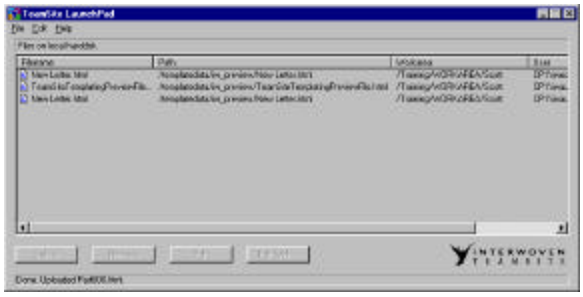
47. Click **Once** on the **Part500 File** in the LaunchPad Window. The following screen appears:



48. Click the **Upload Button**. The following screen appears:

49. Click the **Remove Button** to delete the file from your computer. This file is not needed as it is saved on the TeamSite Server. Also, after a while, you will have numerous files taking up space on you local computer.

50. Notice the **Part500 File** is removed from the TeamSite LaunchPad Window as displayed below:



51. Close the TeamSite LaunchPad Window.

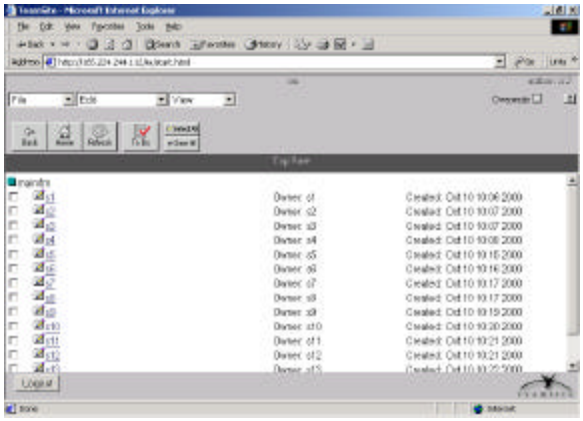
52. Close the TeamSite Editing Window and click the **Refresh Button** in TeamSite. The **Refresh Button** is **Directly Below** the **File Pull Down Menu**.

53. To **View** the **Part500 File** you just saved, Navigate to the Workarea where the File is located and click it.

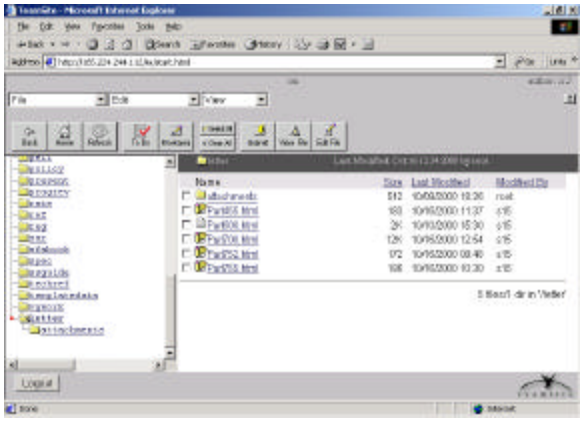
Modifying Files Using the SmartContext Editing Tab

Lesson 6: Modifying Files

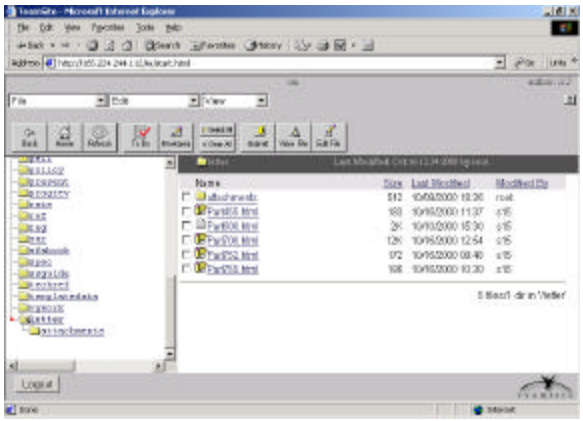
1. After logging in as an **Author** or *higher* go to your Workarea by clicking the **Workarea Button**. The **Workarea Button** has a **Folder** with a **Pencil** in the **Center** and is **Directly Below** the **Edit Pull Down Menu**. If the **Workarea Button is not displayed**, your TeamSite directories should already be displayed. The following screen appears:



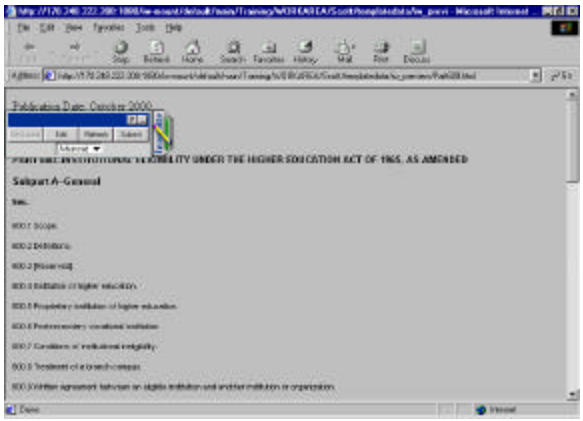
2. Click the directory on the *left* side of the screen you want to go to. A screen similar to yours appears:



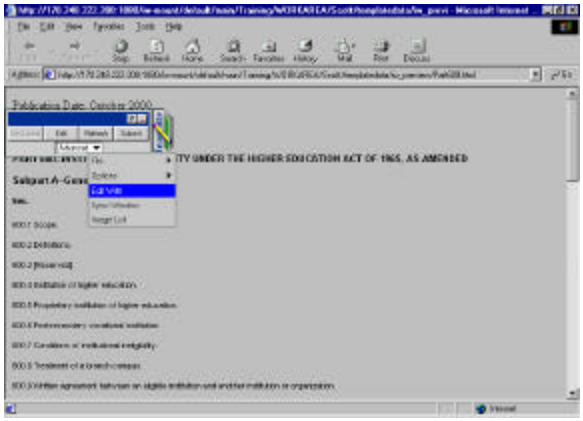
3. **Navigat**e to the **Part500 File** is located and then go to your **Workarea** on the *right* side of the screen. The following screen appears:



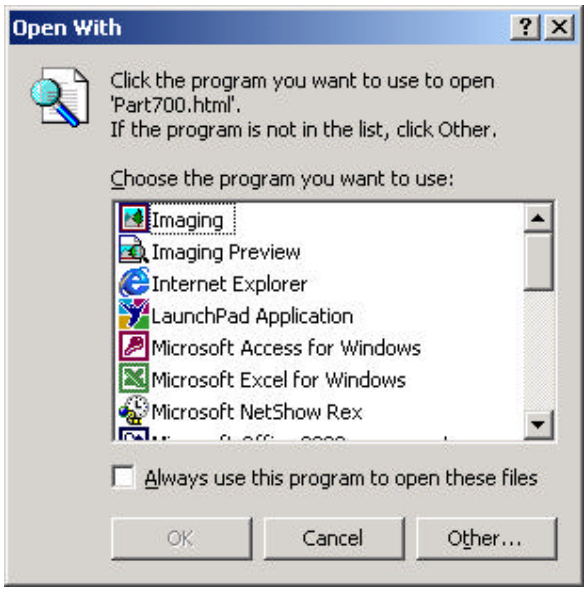
4. Click the **Part500 File**. After you click the **Part500 File**, only a portion of the SmartContext Editing Tab might be displayed; if just a portion of the Tab is displayed, click on the Tab to display the entire Tab. The following screen appears:



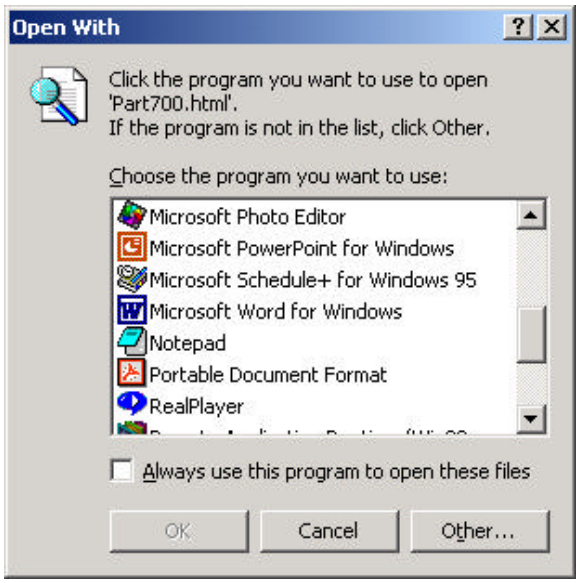
5. To **Edit** the **Part500 File**, click the **Advanced Pull Down Menu** on the **SmartContext Editing Tab**. The following screen appears:



6. Click **Edit With**. The **TeamSite LaunchPad Window** will open and be **Minimized** and the **Open With Window** will also open. The following screen appears:



7. Scroll down until you see the **Microsoft Word for Windows Icon**. The following screen appears:

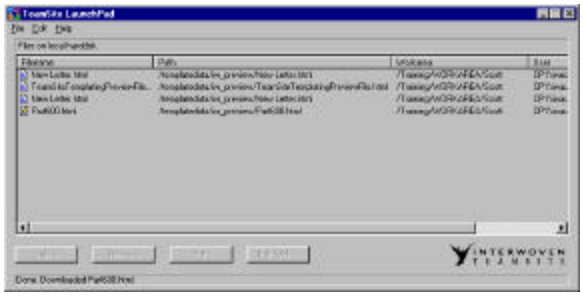


8. **Double Click** the **Microsoft Word for Windows Icon** to open your document in Microsoft Word. The document will be opened and displayed on your screen.

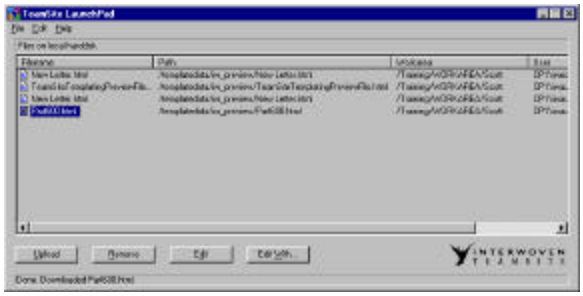
9. Make your changes to the **Part500 File**.

10. **Save** and **Close** the **Part500 File** by clicking the **Save Icon** in Microsoft Word. Don't worry about identifying where the File will be saved, the following steps will cover this procedure.

11. Maximize the **TeamSite LaunchPad Window**. A similar screen appears below:



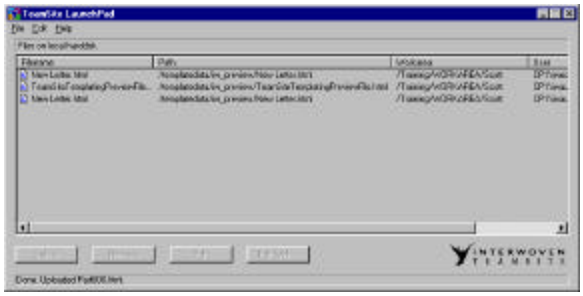
12. Click **Once** on the **Part500 File** in the **LaunchPad Window**. The screen appears below:



13. Click the **Upload Button**. The following screen appears:

14. Click the **Remove Button** to delete the File from your computer. This File is not needed as it is saved on the TeamSite Server. Also, after a while, you will have numerous Files taking up space on you local computer.

15. Notice the **Part500 File** is removed from the TeamSite LaunchPad Window as displayed below:



16. Close the **TeamSite LaunchPad Window**.

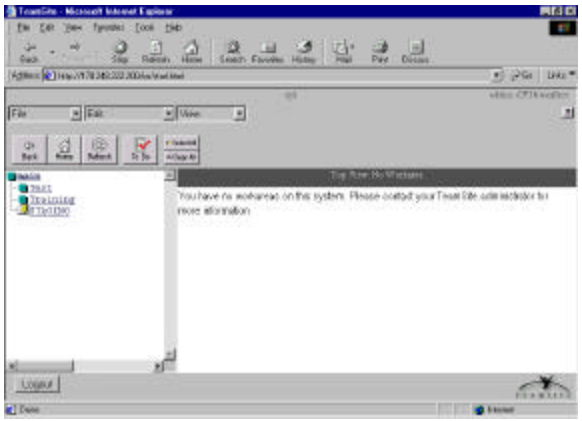
17. Close the **TeamSite Editing Window** and click the **Refresh Button** in TeamSite. The **Refresh Button** is **Directly Below** the **File Pull Down Menu**.

18. To **View** the **Part500 File** you just saved, **navigate** to the Workarea where the **Part600 File** is and click it.

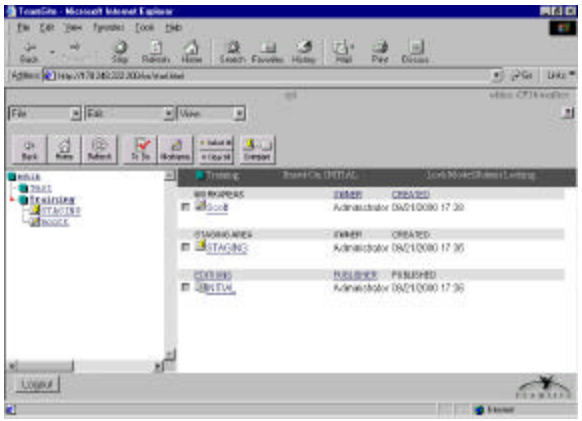
Submitting Your Work from the SmartContext Editing Tab

Lesson 7: Submitting from the SmartContext Editing Tab

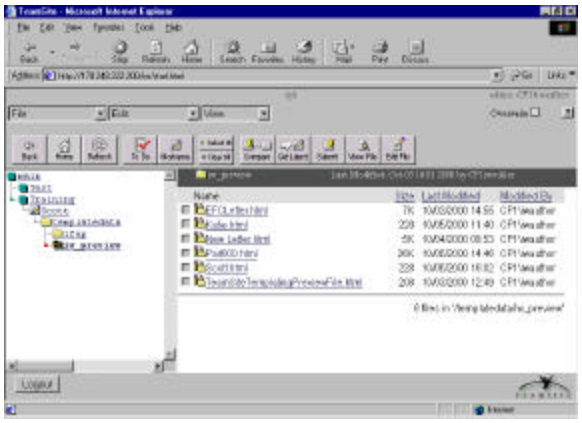
1. After logging in as an **Editor** or *higher*, go to your **Workarea.** The following screen will be displayed. (If the screen below is not displayed), click the **Workarea Button**, the **Workarea Button** has a **Folder** with a **Pencil** in the **Center** and is **Directly Below** the **Edit Pull Down Menu**. The screen appears similar to the one below:



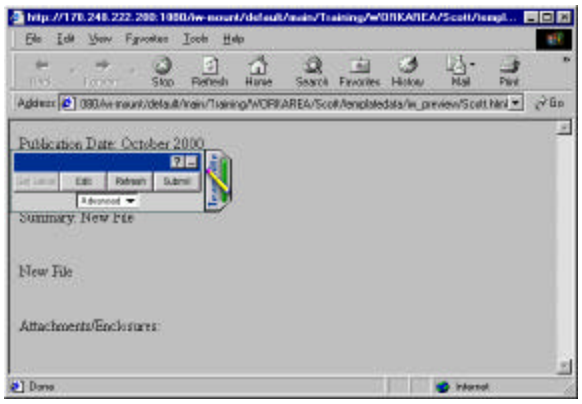
2. Click on the **Directory** under the **Main Branch** on the **Left** side of the screen where your **File(s)** is/are located that you want to Submit to the Staging Area. A similar screen appears below showing your **WorkArea** on the *right* side of the screen:



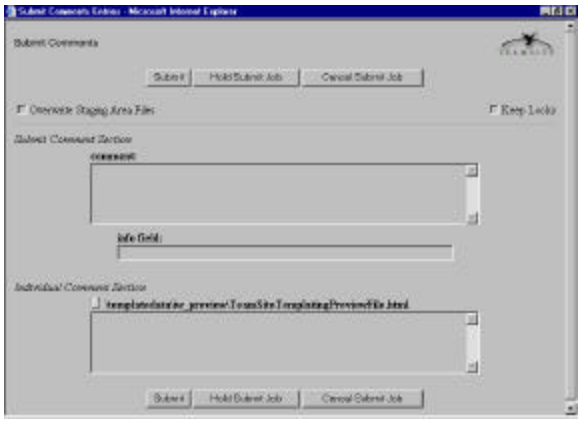
3. Click the **Folder** in your **Workarea** where the **File** is located you want to Submit to the Staging Area. You might have to click more than one Folder to locate your File. We will submit the **Scott File** for this exercise. A screen appears similar to the one below:



4. Click the **Scott File**. After you click the **Scott File**, only a portion of the SmartContext Editing Tab might be displayed; if just a portion of the Tab is displayed, click it to display the entire Tab. The screen appears below with the SmartContext Editing Tab:



5. Click **Submit** in the SmartContext Editing Tab. The screen appears below:



6. Click the **Overwrite Staging Area Files Checkbox** and Keep **Lock Checkbox** if you want to overwrite the same File in the Staging Area and Keep your Lock on the File.

7. Fill in the Submit Comment Section **Comment Field** if you want to add comments.

8. Fill in the **Info Field** if you want to add comments in that field.

9. Fill in the **Individual Comments Section Field** if you want to add comments in that field.

10. Click the **Submit Button**. A **Submit Job Successful Window** will *briefly appear* advising you that your File was submitted to the Staging Area.