

## Board and Council Collaboration Sites Instructions for PC Users

### General Notes

- Clicking on the name of an AGU staff member *anywhere but in the Contacts list* may send you to an error page. This is because the site is trying to access information about that staff member that is housed separately in the staff intranet. Simply click your browser's 'Back' button or retype the URL to return to your collaboration site.
- Because the site was built using SharePoint, a Microsoft product, Internet Explorer is the recommended browser. However, all information and functionality should be accessible in all standard browsers (Internet Explorer, Firefox, Safari, and Chrome, but not Opera).
- Please make sure your browser is up to date. Older browsers, no matter what which one (Internet Explorer, Firefox, etc.), may not be able to handle the functionality of the site.

To check for updates:

- Click on 'Help', then select 'About'. The About message may indicate if an update is available.

Alternatively, go to the browser's website to see if an update is available.

- [www.Mozilla.org/en-US/firefox](http://www.Mozilla.org/en-US/firefox)
- [www.Windows.microsoft.com/en-US/internet-explorer](http://www.Windows.microsoft.com/en-US/internet-explorer)

### Logging In

- If you know your password is correct but you are still unable to log in, try entering your username as **agu-net\username**. For example: agu-net\RMcDonald. PLEASE NOTE the direction of the slash!
- Remember that your password is case sensitive.

### Logging Out

- Click on your name in the upper right hand corner. Select 'Sign Out.'
- Remember to close your browser window by clicking on the X in the upper right hand corner.

### Meetings

## Board and Council Collaboration Sites Instructions for PC Users

- To expand the list of documents associated with a particular meeting date, click the 'plus' sign or the words 'Meeting Date'.
- To open a document, click on the document title.
- To go back to the collaboration site after viewing the document, use your web browser's 'back' button.

### Collaboration Workspace

- The premise of the Collaboration Workspace is that documents are checked out (locked for editing by one user) and then checked in (available for all users to see and edit), similar to a library book. Please remember to check in the document after editing and to double check that all edits were saved.
- Please remember not to click on the name of an AGU staff member *anywhere but in the Contacts list*, as it may send you to an error page. If this happens, simply click your browser's 'Back' button or retype the URL to return to your collaboration site.
- To add a document
  - Click 'Add document' at the bottom of the green section.
  - Click 'Browse.' Navigate to where the document is saved on your computer. Select the file, and click 'Ok'.
  - Give the document a title. Providing feedback is optional. Click 'Save'.
- To view a document
  - Click the title of the document.
  - You may need to enter your username and password again if you open a MS Office document (Word, Excel, etc). To avoid this in the future, click 'remember my credentials.'
  - Unless you want to edit the document, click 'Read Only.'
- To edit a document
  - Click the title of the document.
  - You may need to login again if you open a MS Office document (Word, Excel, etc). To avoid this in the future, click 'remember my credentials.'
  - Click 'Read Only.'
  - Once the document is open, a bar should appear at the top of the screen, prompting you to 'check out' the document if you want to make edits. Click 'Check Out.'
  - Make your changes in the document.

## Board and Council Collaboration Sites

### Instructions for PC Users

- To upload the new document with your change, click 'File', then 'Info', then 'Check In'.
- Add any comments you would like others to see about your changes.

#### Discussion Forum

\*\*Please note that the discussion forum may be replaced with a similar but more functional version that AGU custom-built. These directions will be updated at that time.

- Please remember not to click on the name of an AGU staff member *anywhere but in the [Contacts list](#)*, as it may send you to an error page. If this happens, simply click your browser's 'Back' button or retype the URL to return to your collaboration site.
- To start a discussion
  - Click 'Add New Discussion' at the bottom of the section. This can be done from either the Home Page or the Discussion Forum page.
  - Enter the subject and body of the post.
    - In the body, use the Editing Tools functions to format text and to insert files or images. The Editing Tools tabs appear in orange.
  - When finished, click Save.
- To reply on a discussion thread
  - Click on the title of the post on which you would like to comment.
  - The original post and each subsequent comment will be demarcated with a blue bar. To reply to any of these, click 'Reply' at the far right side of the blue bar above that post or comment.
  - Editing Tools (format text and insert files) are available. The Editing Tools tabs appear in orange.
  - When finished, click Save.
- You may need to login again if you open a MS Office document (Word, Excel, etc). To avoid this in the future, click 'remember my credentials.'

#### Key Documents

- To open a document, click on the document title.
- To go back to the collaboration site after viewing the document, use your web browser's 'back' button.

#### Calendar

## Board and Council Collaboration Sites Instructions for PC Users

- To scroll through the months, use the arrows under the green 'Calendar' heading.
- To see more information on a particular entry, click the title of the event.

### Contacts

- To sort any of the columns *except Memberships* in alphabetical order or reverse alphabetical order, click on the column heading.
- To filter the Memberships column to show only people in a particular membership group:
  - Hover over the memberships heading until an arrow appears to the right.
  - Click on the arrow to expand the drop-down menu.
  - Select the membership type you would like to see. Only one membership group can be selected.
  - To clear the filter, select 'Clear Filter from Memberships.' This will show all entries again.

### About AGU

\*\*Please note that the format of this page may be updated. It should not impact functionality at all, but if so, these directions will be updated at that time.

- To view the information, click on the links.

### Help

- To view the documents, click on the title of the document.
- To contact the AGU staff member via email, click on the email address; or call the phone number listed.

### Alerts

- To set an alert
  - Click on your name in the upper right hand corner.
  - Select 'My Settings.'
  - Click 'My Alerts.'
  - Click 'Add Alert.'

## Board and Council Collaboration Sites

### Instructions for PC Users

- Choose the part of the site for which you'd like to receive the alert (i.e. Discussion Forum, Announcements, etc.)
  - Click 'Next' at the bottom of the page.
  - **Recommended:** Add 'AGU Board' or 'AGU Council' to the alert title, as this will be the email subject line.
  - Select your preferences for each of the following categories
    - Change Type
    - Send Alerts for These Changes
    - When to Send Alerts
  - Click Ok at the bottom of the page.
- 
- To edit an alert
    - Click on your name in the upper right hand corner.
    - Select 'My Settings.'
    - Click 'My Alerts.'
    - Click the name of the alert you wish you change.
    - Edit the preferences you wish to change.
    - Click Ok at the bottom of the page.
- 
- To delete an alert
    - Click on your name in the upper right hand corner.
    - Select 'My Settings.'
    - Click 'My Alerts.'
    - Select the alerts you wish to delete by clicking the check box next to those alerts.
    - Click 'Delete Selected Alerts'
    - When prompted to confirm the deletion, click 'Yes'.