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Bioterrorism Readiness Suite™ 4.1 User Guide

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Table of Contents

1 Introduction

Welcome to the BTRS 4.1 User Guide!

This chapter provides you with information about:

- BTRS, including what's new for this version
- How this guide has been put together
- Using this guide and the BTRS portal

What Is Bioterrorism Readiness Suite?

Bioterrorism Readiness Suite™ (BTRS) serves as a single, central point of log-on and access for finding, creating, and sharing information through a browser-based interface. If you have access to the Internet, you can access BTRS' portal content and collaboration areas, links to resources and applications, alerts, notification functions, and the role-based directory. Like any Web site, you simply click on buttons and links to access content and perform functions.

BTRS enables you to:

- Send alerts to and receive alerts from other users within your health area network (HAN)
- Securely share and collaborate on documents
- Locate contact information for other users within your HAN
- Read your HAN's latest news and announcements

What's New in This Version?

BTRS 4.1 includes the following additional features and improvements over BTRS 3.0:

- *Send alerts to specific BTRS users* — In addition to selecting roles or role groups to receive alerts, on the Send Alert by User page you can search for individual users by the information in their user profiles, then select some or all recipients to receive the alert. This feature enables you to search the directory for users who are assigned to your alertable roles or role groups using information entered on the User Profile page.
- *Send alerts using templates* — You can send alerts using designated alerting templates that already include the alert's priority, duration, subject, and message, as well as which roles and role groups will be

alerted. You only need to click once, and the alert information is automatically prepared for you to send. Each template that you have permission to use appears on the Send Alert by Role page. Templates can also be used for the new phone-based alerting functionality in this version as well. For more information, see “Sending Alerts Using Templates” in Chapter 5, page 94.

- *Launch alerts via telephone* — BTRS users can now activate alerts over the telephone by entering a Call-in PIN Code, then selecting an Alert Scenario template to send the alert. Each template contains alerting information predetermined by a BTRS Administrator; once you select the template, BTRS activates the alert using this information to send to selected users.
- *Resend alerts to unconfirmed users* — BTRS now provides the ability to resend Alerting Profile and Work Email Only alerts to users who did not confirm from any of their designated locations. In addition, Work Fax Only alerts are resent to all fax numbers that did not successfully receive the fax. With one click, you can quickly resend the original alert only to those users who need to receive the alert an additional time without the hassle of determining which users to send it to.
- *Alert profile scheduling* — You can now assign which days and times each alerting profile will be active, enabling you to create an automated daily schedule for receiving alerts. Alert notifications will be sent to the devices you choose anytime, day or night, based on your active profile. BTRS automatically changes activates/ deactivates the alerting profile at the time you designate in your schedule. For example, BTRS can automatically switch your active alerting profile on Friday at 6:00 pm to “Out of Office”. On Monday morning at 7:00 am, BTRS then switches to your “In Office” alerting profile.
- *Expanded e-mail confirmation ability* — Alert recipients can now confirm an alert by replying to an e-mail directly rather than going through the portal. This is particularly useful when using handheld devices that cannot access the Internet.
- *Include recorded alert messages* — You can now record an alert message on their local workstations and attach it to alerts you send to roles and through templates. For each alert, you can upload a .wav file (up to 10MB) that will be read as the message in alerts sent to phone devices.
- *Customizable alert signature* — BTRS users sending alerts by role or through templates can now choose to include an alerting “signature” that includes the user’s name, organization, and e-mail address within the body of the alert message. The information can be included in the message for e-mail, fax, and portal notifications, as well as read as part of the message in phone notifications.
- *Enhanced alert reporting* — On the Alert Details pages, users can choose to view either a basic or extended version of the user confirmation information. The basic view includes each user’s name

and User ID, and enables you to click the user's name to view the details of that user's alert notification. The extended view continues to display all details for each user and location notified as in previous versions of BTRS, and now includes User ID and the role's or user's Alert Priority as well. In addition, with a simple click, both versions of the report can easily be exported to a .csv file.

- *Resend Document Faxes* — BTRS now provides the ability to resend document faxes that were not successfully sent, without having to reselect the document and role(s) to send it to.
- *Password and profile update reminders* — You may now receive e-mail notifications to remind you to update your profile or change your password in accordance with your organization's requirements.

About This Guide

To make the learning process more efficient for you, information in this guide is presented in a format different from previous versions of BTRS. The organization of the book helps you easily gain access to what you need, and then move on with your job.

Deciding Which Book to Use

We decided that the best way to organize and format the documentation was to divide the information into two books — a *User Guide* and an *Administrator Guide*. While both books provide step-by-step instructions, the focus of each is directed at accomplishing different types of tasks.

The *User Guide* is aimed at the day-to-day operations for those with BTRS Collaboration licenses working through the BTRS portal to collaborate on and post documents, and to send and receive alerts. The *User Guide* contains an overview of BTRS, provides descriptions of its functionality, and shows you how to accomplish specific tasks.

The *Administrator Guide* focuses on more advanced and technical operations, including:

- Setting up user accounts and permissions
- Managing portal content, folders, documents, and discussions
- Generating reports

Standards and Conventions Used in This Guide

This BTRS guide uses several conventions to help make accessing information easy and efficient. These conventions include:

- Standard user-friendly terminology
- Step-by-step instructions for completing processes
- Notes, tips, and cautions for using the BTRS portal
- A glossary of terms and an index for easy information lookup

Standard Terminology

This section describes both the technical and common terms used in this guide. Wherever possible, we have attempted to use familiar language that accurately reflects the functions it represents.

Microsoft® Technology Terminology

The BTRS system shares many terms with the product Microsoft® SharePoint Portal Server, as the SharePoint® product has been used to create the portal environment in which you'll be working. Although these terms may be unfamiliar to you, they represent elements of Internet browsers and windows that you likely already recognize. In addition to the following terms, please see the Glossary for additional definitions.

The following table "translates" some of the more technical terms into everyday language:

Microsoft® or technical term	Definition	What this means in BTRS
Dashboard	A page on a dashboard site. Each dashboard contains a collection of Web parts in a modular view that can be presented to users in a Web browser. Microsoft developed the term "Digital Dashboard" to reflect different areas and components of the page, similar to that of a car's dashboard.	This term is used to represent two things: • The menu of choices you can select from on the Web page to access another area of the portal. Physically, this bar appears near the top of each page in the BTRS portal. This guide also refers to the "dashboard" as the "BTRS navigation bar." • The page of the portal you are viewing or accessing, such as the *Document Library* or *Directory* dashboard. This guide also refers to this definition as "page" or "Web page."

Microsoft® or technical term	Definition	What this means in BTRS
Dashboard site	A Web site created by using Digital Dashboard technology. The dashboard site contains a number of pages, or dashboards, and includes customization pages and custom Web part forms. The dashboard site is used to distribute information to workspace users through a Web browser.	The entire Web site or portal. This guide also refers to “dashboard site” as “portal.”
Portal	A Web site considered as an entry point to other Web sites, often by being or providing access to a search engine.	Rather than representing an entry point, the entire Web site, or all the dashboards put together. The BTRS portal provides you with access to other users’ contact information, important documents and news, and alerts. This guide uses “portal” as the primary term to define how BTRS functions.
Web Part	A customizable, reusable component used to display specific information on a dashboard. Web parts are used to associate Web-based content (such as XML, HTML, and scripting) with a specific set of properties in an organizational framework.	A section of a Web page containing information organized by function or type, such the Announcements section on the home page, or document folders. This guide also refers to “Web part” as “section” or “area.”
Workspace	An organized collection of documents, content sources, management folders, categories, document profiles, subscriptions, and discussions. It provides a central location to organize, manage, and publish content.	The entire Web site or portal. This guide also refers to “workspace” as “portal.”

Common Actions Terminology

This BTRS guide uses use common terms for actions and maneuvers you might perform while using BTRS. If you are new to using Microsoft® Windows® or a mouse, these terms may seem unfamiliar to you, but as you become more familiar with the Microsoft® Windows® environment, you can quickly become a skilled user.

The following table provides instructions on how to perform the most common actions.

Term	Action
Click	Point to the item you want, and then quickly press and release the left mouse button.
Expand	In the tree view, click the + (plus sign) next to the item.
Open	Point to the item you want, and then quickly press and release the left mouse button twice (also referred to as “double-click”).
Point	Move the mouse until the mouse pointer is positioned over (pointing to) the item you want (also referred to as “roll over”).
Right-click	Point to the item you want, and then quickly press and release the right mouse button.
Scroll	Click the scroll box in the vertical or horizontal scroll bar and drag the drag the scroll box to see different portions of the page that are not currently visible. Scrolling only changes what is displayed.
Select	Click the item you want. A selected item usually appears in a different color or with a frame around it to indicate that it is selected. To select multiple items, press **CTRL** or **SHIFT** while you click. To deselect one or more items, press **CTRL** or **SHIFT** and click the item again.

Step-by Step Instructions

Each time you need to complete an operation using BTRS, this guide provides easy-to-follow instructions to walk you through your task. Each set of instructions has a step title that describes what the task can help you do. The steps needed to perform the task are numbered in sequence.

The following table describes the different formatting conventions you might encounter when you follow the step-by-step instructions.

Formatting Convention	Description
Triangular bullet	Identifies a step-by-step instruction to complete a task. The step title occurs after the triangular bullet and the steps are listed in sequence below the step title.

Formatting Convention	Description
SMALL CAPS	Identifies a keyboard action. Keys can be used alone, in combinations, or in sequences. For example, **CTRL + P** means to hold down the **CTRL** key while pressing **P**.
ALL CAPS	Identifies a particular URL or path name.
Bold type	Identifies the name of a BTRS button, field, list, or menu item in a step-by-step instruction.
Italics type	Identifies the name of a window, page, dialog box, or form.
`Courier` type	Identifies specific text for you to type in a field or on a page.

Note, Tip, and Caution Boxes

Throughout this guide you'll find information in special boxes called Note, Tip, and Caution. Margin icons are displayed next to this information that can help make you a smarter and more effective BTRS user.

Note - This information adds to or further explains a topic, to help you become more familiar with how BTRS works.

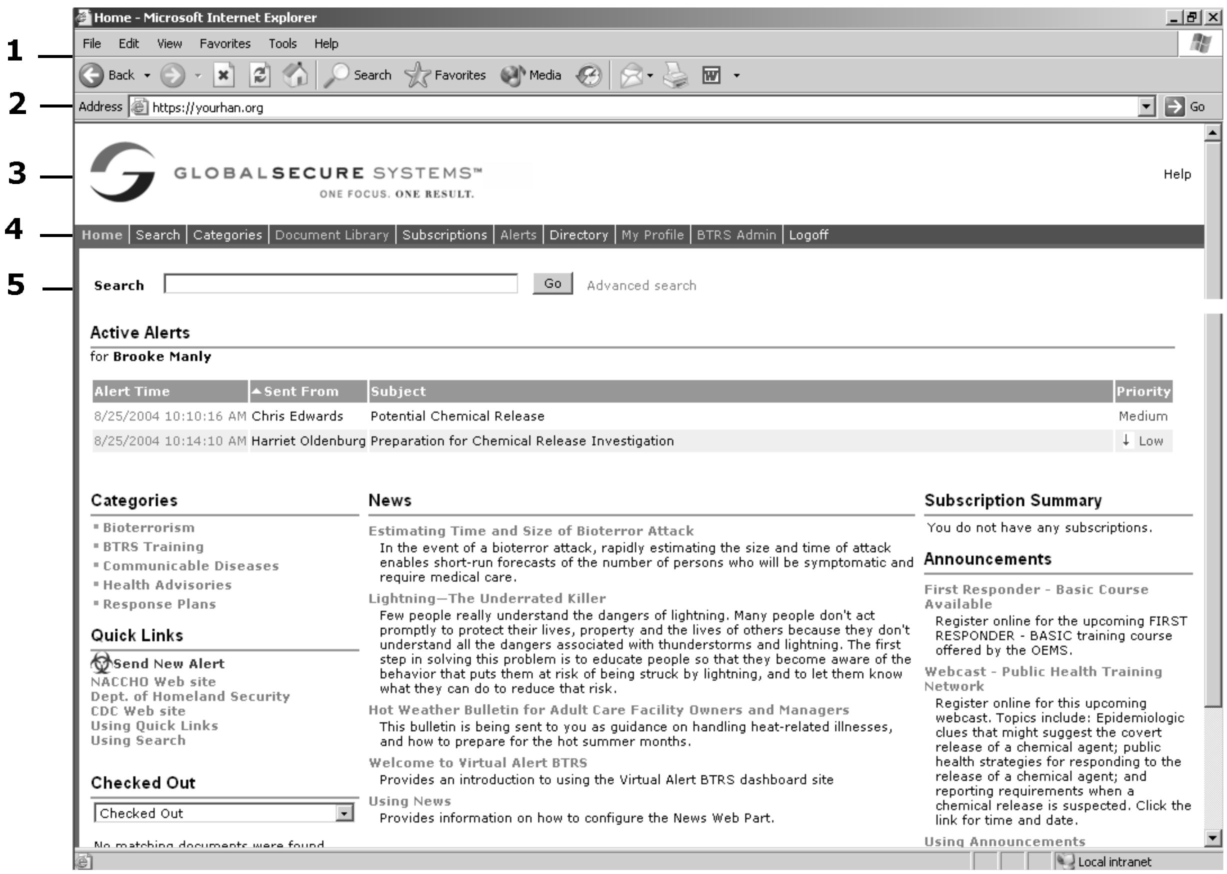
Tip - These are hints and shortcuts that can help increase your productivity as a BTRS user.

Caution - We tell you the dos and don'ts of working with BTRS to help you avoid damaging files or losing data. Often this information is essential to the completion of the task on which you are working.

Understanding Page Elements in the BTRS Portal

The BTRS system has been designed so that you can easily navigate throughout the portal. While each page in the BTRS portal contains specific information and instructions, the layout of the page remains constant so that you can become familiar with the portal in a short period of time.

This section identifies some of the elements you'll see throughout the portal, and how each functions.



Elements of the Home Page

Using this example of the BTRS portal home page, look for the following standard elements:

Number	Description
1	The browser window's Menu bar and Standard Buttons toolbar (you may choose to view any or all of Internet Explorer's toolbars). Use these menus and buttons to print pages, open and close windows, and move back and forth between Web pages.

Number	Description
2	The browser window's Address bar. You can type the URL of your portal here, or view a list of recently-visited pages.
3	The BTRS portal title bar. This area may display your HAN's custom logo or other graphics, and displays the name of the page you are currently viewing.
4	The BTRS navigation bar. You can click these links to visit other areas of the portal. The area you are currently viewing is displayed on the navigation bar in a different color.
5	The BTRS Search bar. This section enables you to search in either simple or advanced mode for items in the portal using keywords, author name, date, file name, or title.

2 Getting Started

Using the BTRS system is as easy as accessing the Internet. The BTRS portal is like any other Web site; once you access it, you can easily move about to view news, announcements, and alerts, documents, and other items posted for your organization's use.

Before you get started using BTRS, take a moment to learn more about how BTRS security is set up. The BTRS system is used by many types of users, including those who create and manage user accounts, those who post and collaborate on documents, and those who use BTRS only to receive alerts. Each set of users may have different levels of access within the portal. If you work with documents in the Document Library, you may also have various levels of permission within folders and documents, based on whether you create, edit, or read document content, or if you must approve or have your document approved before it can be posted.

When you're ready, log in to BTRS, and begin your adventures in the BTRS portal on the home page, which serves as the central area and starting point for many of the step-by-step instructions in this guide.

If you get stuck and cannot find the answer to a question either in this guide, the *Administrator Guide*, or in the online help, contact your organization's BTRS administrator.

Understanding Types of Users and Roles

The BTRS system uses a combination of permissions to create a secure environment within the portal. These permissions are assigned through different types of user licenses and application rights, and Document Library permissions, which may vary from user to user.

If you are unsure what license and permissions you have been assigned, check with your BTRS administrator.

Types of User Licenses

Each BTRS user is assigned a particular type of user license when his or her account is created. Your BTRS administrator determines which license you receive – either BTRS Administration, BTRS Collaboration, or BTRS Alerting.

The following table shows the kinds of functions you can perform with each license:

What you can do	BTRS Administration	BTRS Collaboration	BTRS Alerting
Update your user profile	X	X	X
Update another user's profile	X		
Receive alerts	X	X	X
Send alerts	X	X	
Cancel alerts	X	X	
Read information and documents posted on the home page	X	X	
Use document collaboration tools (discuss, check-in/out or publish, and fax documents)	X	X	
View the role-based directory	X	X	X
Manage users, roles, role groups, and folders	X		
Generate reports	X		

Roles, Role Groups, and Organizational Units

In BTRS, each user can be assigned to one or more roles, and these roles may be assigned to one or more role groups within Organizational Units (OU). This enables you to save valuable time in emergencies by quickly identifying users by the function(s) they perform, rather than searching for an individual user. In addition, security and permissions in BTRS are often assigned to roles or role groups, rather than to individual users, to help adminstrators maintain an organized environment.

For more information about what roles, role groups, and OUs are, see the *Administrator Guide*.

For more information about what roles, role groups, and OUs are, see the *Administrator Guide*.

The following table briefly describes what roles, role groups, and OUs are, and how they function in BTRS.

This group	Denotes this
User	An individual user in BTRS (e.g., Peg Simpson)
Role	The function that one or more users perform (e.g. Peg Simpson and Jack Underhill both are assigned to the role Springfield Public Health Officers)
Organizational Unit	A way to organize one or more roles that fall under a single jurisdiction, or that work as a team (e.g., Epidemiologists, HAN Coordinators, and Emergency Services Coordinators who all work in Hudson County) For organizational purposes, this unit is often created to group roles working for the same organization or in the same area
Role Group	Several roles that can be assigned or collected into a single group (e.g., All workers in all roles in the city of Springfield, or all California HAN Coordinators) For alerting and security purposes, this unit is often created to group roles in similar job functions or locations

Types of User Permissions

In addition to user licenses, BTRS administrators can also assign various security permission levels to each user account. These permissions can be assigned either to your role or role group, or to a particular folder in the Document Library. Therefore, when you use the BTRS portal, you may be able to see and access areas and items that other users cannot, and vice versa.

Role-based Permissions

Permissions assigned to your role can include the ability to:

- Alert users in other roles and receive alerts from other users
- Belong to one or more role groups
- Assign certain application rights
- Access certain folders as either an Admin, Author, or Reader
- Assign certain management rights

To help maintain a secure environment within the BTRS portal, most users do not work with role-based permissions; instead, these rights are generally handled by BTRS administrators. Permissions assigned to roles are covered in detail in the *Administrator Guide*.

Document Library Permissions

If you have either a BTRS Collaboration or BTRS Administration license, you can view and access the Document Library, Subscriptions, Categories, and Search sections of the BTRS portal. Users with BTRS Alerting licenses do not see these links on the BTRS navigation bar.

For more information about permission levels in the Document Library section of the BTRS portal, see “Understanding Document Library Permission Levels” on page 49.

Logging on to the BTRS Portal

To access the BTRS software, you must log on to a secure portal. You will need the following information from your BTRS administrator before you begin:

- The user name and password you will use to log on
- The Web address (URL) of your BTRS portal

The first time you log on to the BTRS portal, you need to complete your profile information. For more information, see “Logging on for the First Time” on page 33.

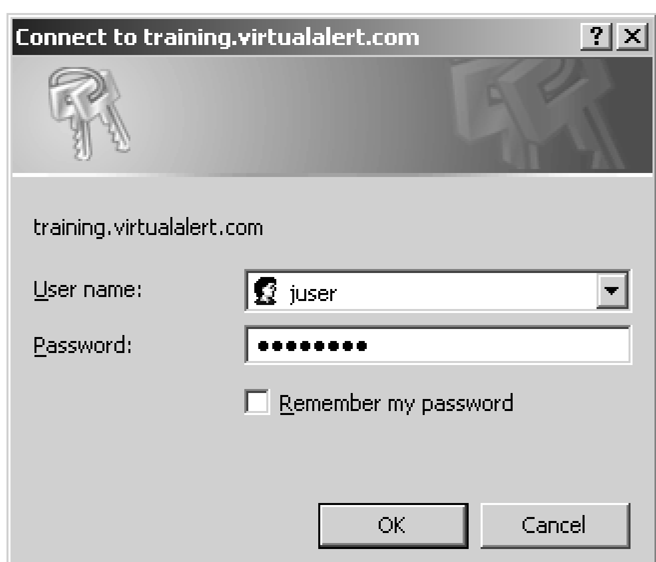
To log on to the BTRS portal

1 Open Microsoft® Internet Explorer.

2 In the **Address** bar, type the Web address of your BTRS portal.

3 Press **ENTER** or click .

The *Connect to* dialog box opens.



4 In the **User name** field, type the user name provided by your BTRS administrator.

Your user name is case sensitive. Make sure it appears in the field exactly as it was given to you.

You may change your password after successfully logging in for the first time. For more information, see “Changing Your Password” in Chapter 3, page 47.

5 In the **Password** field, type your password.

Your password is case sensitive. Make sure it appears in the field exactly as it was given to you.

If you forget your password, contact your BTRS administrator.

6 Click **OK**.

The *Connect to* dialog box closes and the BTRS portal appears in your browser window.

Logging off of the BTRS Portal

When you are done accessing information through the BTRS portal, you may log off and close your browser window.

You may also choose to close the browser by clicking the **X** in the top right corner of the window; however, your session will not end until you have closed all browser windows.

To log off of the BTRS portal

1 On the BTRS navigation bar, click **Logoff**.

BTRS displays a message reminding you to close your browser window to complete the log off process.

2 Click **Logoff**.

Microsoft® Internet Explorer displays the message, “The Web page you are viewing is trying to close the window. Do you want to close this window?”

3 Click **Yes**.

The browser window closes.

Navigating through the BTRS Portal

One of the first steps toward becoming an experienced BTRS user is learning how to navigate through the BTRS portal. Several pages in the portal contain standard elements to help you become familiar with the format and layout of the pages, including the BTRS navigation bar, and search and help functions. In addition, you can move between pages within the portal to return to a previous view easily using one of several methods.

Using the Navigation Bar

The BTRS navigation bar is the primary feature that enables you to quickly access all areas of the portal. On each page of the portal, the navigation bar provides links to other pages and sections.

BTRS navigation bar

Your navigation may appear differently than the one illustrated above depending on the type of user license you have.

The area of the BTRS portal that you are currently viewing appears on the navigation bar in a different color. Clicking any of the navigation bar links takes you directly to that section's main page.

As you move to other pages within the BTRS portal, the navigation bar's appearance may change to reflect the contents of that section, and a section menu may appear. For more information about using section menus, see "Using Section Menus" on page 17.

Using Bookmarks

You can create a bookmark to your BTRS Home page by logging into the Home page and using the "Add to Favorites" feature on your Browser.

Due to the security restrictions of a web portal, once you add the portal page to your favorites, you must enter the bookmarks properties and **delete any text** that appears after the .gov, .org, .com, etc.

For example: http://www.microsoft.com/isapi/gomscom.asp?target=/ should be edited to say http://www.microsoft.com.

To edit the bookmarks properties

1 From the **Favorites** menu in your browser, navigate to the Home page bookmark and right-click it.

2 From the sub-menu, select **Properties**.

The *Bookmark Properties* dialog box displays.

3 On the **Web Documents** tab, the URL field, highlight the Web address of the portal.

4 If anything appears after the .gov/.com/.org, etc. delete it.

5 Click **Apply**.

The browser saves the edit to the bookmark.

6 Click **OK**.

Moving between Pages

If you inadvertently access the wrong page or are finished viewing a page and want to return to the previous page you were viewing, you have the flexibility to select different methods of moving between pages, based on the page you are viewing.

Clicking the Back Button

BTRS does allow you to click Internet Explorer's **Back** button to return to the previous page you were viewing.

Back button in the Internet Explorer window

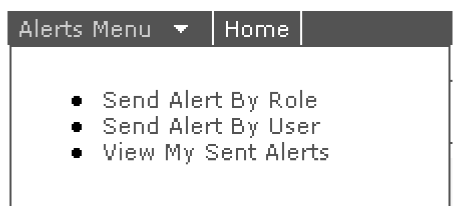
Clicking "Up One" Links

In the Document Library and Categories sections, you can click the **Up One Folder** and **Up One Category** links, respectively, to return to that folder's or category's parent folder/category.

Up One Folder link

Using Section Menus

In the Alerts, Document Library, and BTRS Admin sections of the BTRS portal, menus pertaining to each section appear when you access a secondary-level page. These menus enable you to select other pages within the section, or return to the home page.



Alerts menu

To access the section menu, on the BTRS navigation bar, click the arrow next to the section title, then click the page you want to view.

Using Search

BTRS enables you to search for published documents, folders, and categories within your BTRS portal using both simple and advanced searches. Simple searches allow you to look for items by keyword. Advanced searches enable to add query elements such as data, author, title, file name, and category. In addition to searching within the entire BTRS portal, while viewing pages in the Document Library or in the Categories sections, you can also perform searches within a folder or category.

The BTRS Search bar appears on many pages in the BTRS portal, including the Categories, Document Library, and home pages, as well as the *Search* page. By default, the Search bar appears in simple search mode.

The Directory section of the BTRS portal uses a separate search function to locate users within the directory. For more information about this feature, see “Searching for Users in the Directory” on page 104.

Using Search Engine Parameters

Any search is only effective if you are able to locate the item you are looking for, and often, part of the reason you are searching is because you do not know when the item was created, what it is called, or what type of file it is. In these cases, you can use several different methods to locate what you are looking for.

Only published documents appear in search results. In addition, only documents and folders you have permission to view appear in the results of your search.

While most search engines use similar methods to perform queries, the following table lists some common and basic search methods to help you locate folders, documents, and categories:

For example, type this	To do this
regional, director, meeting	Search for items that contain the words “regional,” “director,” *and* “meeting”
“regional director meeting”	Search for items that contain the phrase “regional director meeting”
regional or director or meeting	Search for items that contain the words “regional,” “director,” *or* “meeting”
*.doc	Search for all files with a .doc extension
reg*.doc	Search for all .doc file names that begin with “reg”

Performing Simple Searches

Using the simple search method allows you to look for folders, documents, and categories quickly, by entering one or more keywords that are a part of the document, folder, or category’s title or contents, or the document’s file name.

You can perform a simple search either from the Search bar on any page in the BTRS portal, or by accessing the *Search* page.

To perform a simple search

1 Perform one of the following functions:

If you are viewing	Do this
Search page	In the **Search** list, select **This Site**
Document Library page	In the **Search** list, select **This Site** or **This Folder**
Categories page	In the **Search** list, select **This Site** or **This Category**

If your Search bar is currently in advanced search mode, you can return to the simple search mode by clicking **Simple search**.

If your Search bar is currently in advanced search mode, you can return to the simple search mode by clicking **Simple search**.

2 Using the key in “Using Search Engine Parameters” on page 18, in the **for** field, type the word or words you want to use in the search.

3 Click **Go**.

BTRS searches for your terms. When the search is complete, BTRS displays the search summary and matching documents.

To organize your search results, follow the steps in “Viewing Search Results” on page 20.

Performing Advanced Searches

When you want to provide more information to narrow the results of your search, you can use the advanced search method.

To perform an advanced search

1 In the BTRS navigation bar, click **Search**.

– or –

On the Search bar, click **Advanced search**.

The advanced search features appear.

2 Perform one or more of the following tasks:

In this field or list	Do this
Search	Select **This Site**, **This Folder**, or **This Category**
for	Type the word or words you want to use in the search
Search by profile	Select a profile that the file is assigned to, including **Announcement**, **Base Document**, **News Item**, or **Web Link**

In this field or list	Do this
Search by properties	Create one or more search parameters by: • Selecting a data source, such as **Author**, **File size**, **Description**, or **Title** • Selecting an operand, such as “equals,” “less than,” or “contains” • Typing the value you want to include
Search by date	Select one of the following to search: • All documents • Documents created or modified within your specified date range

3 When you are done, click **Go**.

BTRS searches for your terms. When the search is complete, BTRS displays the search summary and matching documents.

To organize your search results, follow the steps in “Viewing Search Results” on page 20.

Viewing Search Results

After you complete your search, you can organize the results list in several ways, including by date, title, author, and match ranking.

▸ To sort search results

1 Follow the steps in “Performing Simple Searches” on page 18 or “Performing Advanced Searches” on page 19.

2 On the search results page, under Matching Documents, click one of the following:

Click this	To do this
Best Match	Sort matching documents starting with highest ranking match results
Author	List matching documents alphabetically by the first letter in the author’s name
Title	List matching documents alphabetically by the title of the document
Date	Sort matching documents by the date last modified

3 To change the order the search results are listed in from ascending to descending, click the appropriate link again.

The triangle indicator switches from ▼ to ▲.

Subscribing to Search Criteria

For information about clearing subscription notifications, see “Clearing Subscription Notifications” on page 30. For information about deleting subscriptions, see “Deleting Subscriptions” on page 31.

If you want to be notified when changes are made to documents or when new documents are published to the portal, you can create search criteria and then subscribe to it. When any documents meeting the criteria in your search string are published or modified, a notification is posted on the BTRS home page in the Subscription Summary section. In addition, you can include your e-mail address in the subscription, and BTRS will also send you an e-mail notification.

To create a search subscription

1 Follow the steps in either “Performing Simple Searches” on page 18 or “Performing Advanced Searches” on page 19.

Your search does not need to actually return any matching documents to complete this task.

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2 On the search results page, under Search Summary, click **Subscribe to this search**.

The *New Subscription* page appears, with your search information listed in the **Type a name for this subscription** field.

3 If you want BTRS to send you an e-mail notifying you of changes, type your e-mail address in the **E-mail notification** field.

4 If you opt to have BTRS send you an e-mail notification, in the **How Often** list, select **When a change occurs**, **Once a day**, or **Once a week**.

5 Click **Ok**.

BTRS creates the subscription, which appears on the BTRS home page and on the *Subscriptions* page.

Using Help

On each page of the BTRS portal, you can access online help that pertains to the topic you are working on. For example, if you click the **Help** link on the *My Profile* page, the help system opens to the “My Profile” section.

Elements of the Home Page

The BTRS home page contains several elements that provide you with a quick overview of current alerts, news, and events within your organization, as well as to updates and documents posted on the BTRS portal. These areas include:

- Active Alerts
- Categories
- Quick Links
- Document Status
- News
- Subscription Summary
- Announcements

Because your BTRS portal can be customized so that it represents the needs of your organization, your portal pages might appear differently than those of another user, and from the graphics included in this guide.

Active Alerts

The Active Alerts section of the BTRS home page displays all active alerts sent to you, even if you have already confirmed the alert. Once the alert expires, the alert no longer appears on the page, even if you have not confirmed the alert.

Alert Time	Sent From	Subject	Priority
8/24/2004 1:43:23 PM	Chris Edwards	Investigation Results	Medium

Active alert on the BTRS home page

To sort active alerts, click any column title. Clicking the date and time link for an active alert displays the alert's details, including time sent, the alert sender's name, the alert message text, and the alert's expiration time; you can also confirm receipt of the alert. For more information about sending and receiving alerts, see "Using the Alerting System" on page 79.

Categories

The Categories section of the BTRS home page displays the highest-level categories established for your portal. Categories provide another useful method to quickly access documents.

Categories

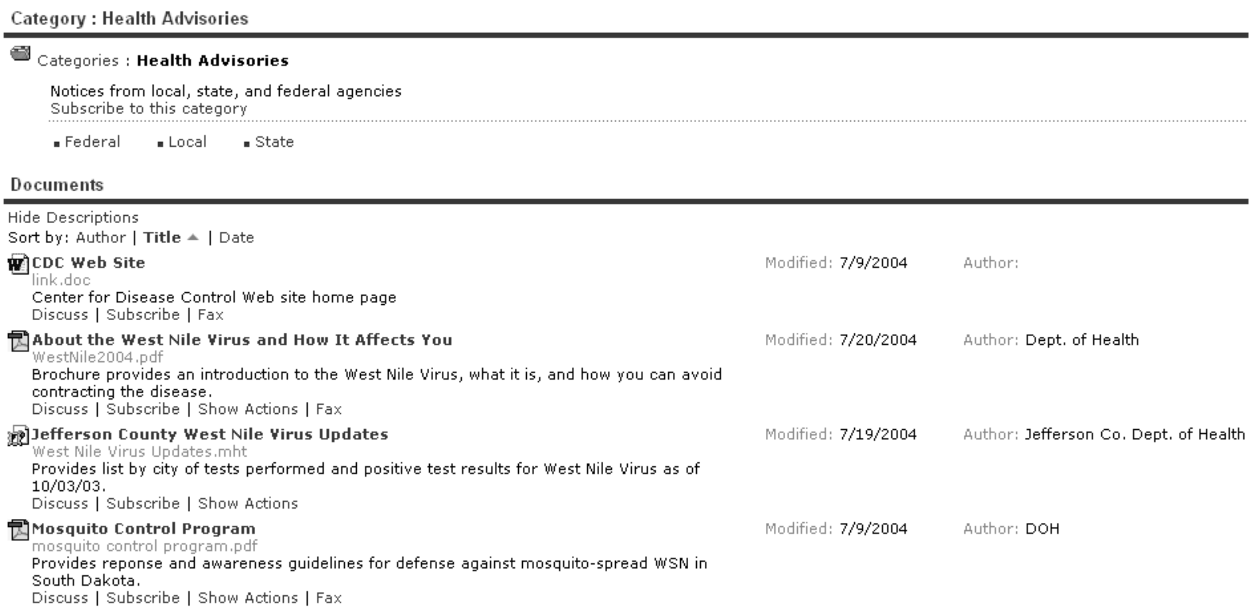
- Bioterrorism
- BTRS Training
- Deployment Plans
- Health Advisories
- Response Plans
- Surveillance

Sample Categories section of the BTRS home page

If you have permission to do so, you can create categories that cross-reference content by topic to locate documents you use frequently. For more information on creating categories, see the *Administrator Guide*.

Depending on how you assign categories when you post your documents, Categories folders may or may not contain the same documents and subfolders as your Document Library folders. For more information about assigning categories to documents, see “Adding Documents to the Library” on page 58. For more information about Document Library folders, see “Working with Folders and Categories” on page 52.

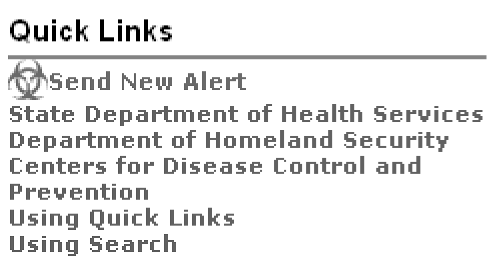
Clicking any of the category links takes you directly to the category’s page and displays all documents assigned to that category. If available, you can read additional information about the category by placing your cursor over the link.



Category page displaying all documents assigned to that category

Quick Links

The Quick Links section of the BTRS home page can provide quick access to other areas of the BTRS portal, as well as Web sites your organization frequently accesses, such as your local or state HAN site, the Centers for Disease Control and Prevention, or the Department of Homeland Security.



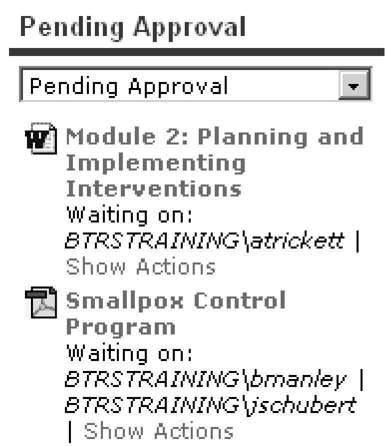
Quick Links section of the BTRS home page

Clicking any link takes you directly to the designated folder, category, or Web site. If the person who created the link entered a description for the item, you can read additional information about the designated location by placing your cursor over the link.

Document Status

The Document Status section of the BTRS home page displays a list of documents that:

- You have checked out of the Document Library (Checked Out)
- Another user wants to publish to the Document Library, and that must first be approved by you (Awaiting Your Approval)
- You want to publish to the Document Library, and that must first be approved by another user (Pending Approval)



Document Status section of BTRS home page (Pending Approval view)

The title of the section reflects the option you select in the list. By default, the section displays documents checked out to you.

Viewing Documents Checked Out to You

Selecting **Checked Out** in the list on the BTRS home page displays the list of documents currently checked out to you.

For each document, you can perform the following functions:

Click this	To do this
The name of the document	Displays the document's contents.
Check In	Displays the *Check In Document* page. For more information about checking in documents, see "Checking In Documents" on page 58.
Show Actions	Displays the *Document Inspection* page. For more information about document properties see "Working with Documents" on page 55.

Viewing Documents Awaiting Your Approval

Selecting **Awaiting Your Approval** in the list on the BTRS home page displays the list of documents that you must approve before the document can be posted to the portal.

For each document, you can perform the following functions:

Click this	To do this
The name of the document	Displays the document's contents.
Approve/Reject	Displays the *Document Inspection* page. For more information about document properties see "Working with Documents" on page 55.

Viewing Documents Pending Approval

Selecting **Pending Approval** in the list on the BTRS home page displays the list of documents you have posted that are awaiting another user(s)'s approval before being successfully published. Under each document, a list of users who need to approve the document displays.

For each document, you can perform the following functions:

Click this	To do this
The name of the document	Displays the document's contents.
Show Actions	Displays the *Document Inspection* page. For more information about document properties see "Working with Documents" on page 55.

News

The News section of the BTRS home page displays documents posted to your BTRS portal that reflect your organization's current news. These items are posted and managed by users with rights to publish BTRS home page content. For more information about publishing content on the BTRS home page, see the *Administrator Guide*.

Clicking any of the News links displays the contents of the article, or takes you to a designated Web page.

Subscription Summary

The Subscription Summary section displays a list of documents, folders, categories, and/or search criteria to which you currently subscribe, followed by the number of new updates posted to the portal.

Subscription Summary section of the BTRS home page

When a change is made to a published document that affects a folder, category, or search criteria you subscribe to, that document appears on the BTRS home page under the name of the subscription. In addition, the number next to the subscription title reflects the number of notifications you have yet to clear.

Documents must be published for a subscription notification to occur.

Clicking a subscription notification link displays the document that has been changed or added. Clicking the subscription name link displays the *Subscriptions* page.

For more information about subscriptions to categories, documents, and folders, see “Creating Subscriptions” on page 28. For more information about creating subscriptions for search criteria, see “Subscribing to Search Criteria” on page 21.

Announcements

The Announcements section of the BTRS home page displays documents posted to your BTRS portal that reflect your organization’s current announcements, in the order they were posted. These items are posted and managed by users with rights to publish BTRS home page content. For more information about publishing content on the BTRS home page, see the *Administrator Guide*.

Clicking any of the Announcements links displays the contents of the announcement, or takes you to a designated Web page.

Working with Subscriptions

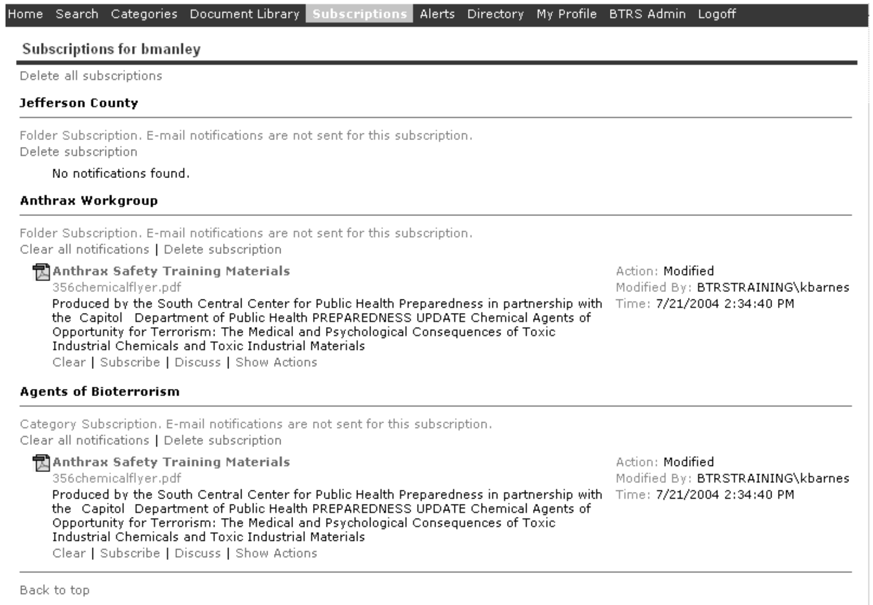
If a single document or set of documents cover a topic that you are particularly interested in or need to keep abreast of, you can subscribe to either the individual document, or a folder or category in which the document resides. When changes are made or new documents are added, you will automatically be notified of the changes.

You can subscribe to categories, folders, documents, and search criteria. Use the following table to determine how each subscription works:

This type of subscription	Generates a subscription notification when
Category	• Changes are made to published documents assigned to that category • New published documents are assigned to that category (but not any subcategory)
Document	• Changes are made to the document and it is republished
Folder	• Changes are made to published documents in that folder or any subfolder • New documents are published to that folder
Search	• Changes are made to published documents returned by your search • New documents are published that meet your search criteria

Subscription notifications appear on the BTRS portal home page. In addition, you can also request that notification be sent to your e-mail address; you have the option to receive e-mail notifications as changes occur, or to receive daily or weekly notifications.

On the *Subscriptions* page, you can view a list of your current subscriptions, along with active notifications. From here, you can also clear notifications you no longer need to appear on the BTRS home page. In addition, if you no longer want to be notified when changes occur to a document, or in a folder or category, you can delete the subscription entirely.



Subscriptions page

Creating Subscriptions

Creating subscriptions to search criteria is covered separately in "Subscribing to Search Criteria" on page 21.

When you want to know when updates are made to a single document, or to documents in a folder or category, you can create a subscription.

After you create a subscription, the subscription name appears on the BTRS home page in the Subscription Summary section, and on the *Subscriptions* page. On the BTRS home page, you can click the name of the subscription to view that subscription's notifications on the *Subscriptions* page.

▸ To subscribe to a folder or category

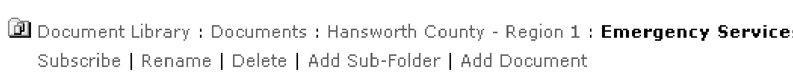
1 In the Document Library, open the folder to which you want to subscribe.

– or –

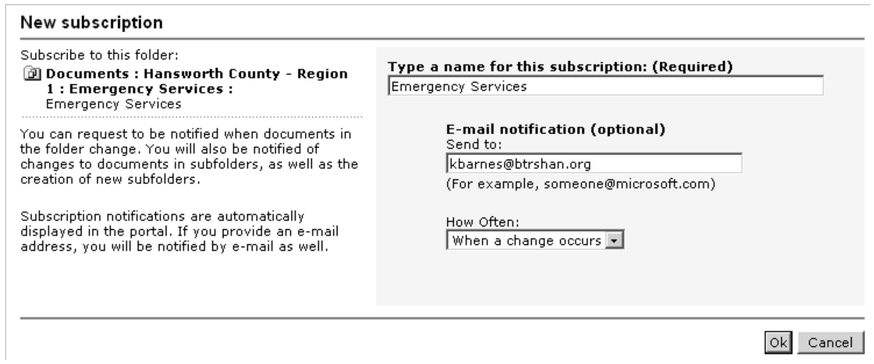
On the *Categories* page, open the category to which you want to subscribe.

For example, if you want to subscribe to the Emergency Services folder, click the link for the Emergency Services folder to display its contents. The current folder name displays in bold.

2 Under the path of the category or folder, click **Subscribe**.



The *New Subscription* page appears.



New subscription page

3 In the **Type a name for this subscription** field, type a name for your subscription.

By default, the name of the folder or category appears in this field. This title appears on the BTRS home page and on the *Subscriptions* page.

4 If you want to receive an e-mail notification when updates occur, in the **E-mail notification** field, enter your e-mail address.

– or –

If you only want notifications to appear on the portal, skip to step 6.

5 In the **How Often** list, select the how frequently you would like to receive e-mail notifications: **When a change occurs**, **Once a day**, or **Once a week**.

This option does not affect notifications displayed only on the portal.

6 Click **Ok**.

BTRS creates the subscription. The subscription title appears in the Subscription Summary section of the BTRS home page, as well as on the *Subscription* page.

To subscribe to a document

1 In the Document Library, open the folder that contains the document to which you want to subscribe.

2 Under the name of the document, click **Subscribe**.

The *New Subscription* page appears.

3 In the **Type a name for this subscription** field, type a name for your subscription.

This title appears on the BTRS home page and on the *Subscriptions* page.

4 If you want to receive an e-mail notification when updates occur, in the **E-mail notification** field, enter your e-mail address.

– or –

If you only want notifications to appear on the portal, skip to step 6.

5 In the **How Often** list, select the how frequently you would like to receive e-mail notifications: **When a change occurs**, **Once a day**, or **Once a week**.

This option does not affect notifications displayed only on the portal.

6 Click **Ok**.

BTRS creates the subscription. The subscription title appears in the Subscription Summary section of the BTRS home page, as well as on the *Subscription* page.

Receiving Subscription Notifications

When you receive notification, either by e-mail or by viewing it on the portal, that a change has occured to a document, category, folder, or search criteria you subscribe to, you can view the document and/or the subscription information.

Click this	To do this
Document name	Open the document for viewing
Subscription name	Display the *Subscription* page

Clearing Subscription Notifications

After reviewing the changes to a published document sent to you through a subscription notification, you can clear the notification so it no longer appears as a new notification on the BTRS home page or the *Subscriptions* page. You can clear individual notifications, or *all* the active notifications for a subscription.

To clear subscription notifications

1 On the BTRS home page, click the name of the subscription.

– or –

On the BTRS navigation bar, click **Subscriptions**.

The *Subscriptions* page appears.

2 Perform one or more of the following functions:

In this area	Click this
To clear a single notification	Under the name of the document you want to clear, click **Clear**
To clear all notifications for a subscription	Under the title of the subscription you want to clear, click **Clear all notifications**

The documents are removed from the *Subscriptions* page and BTRS home page.

Deleting Subscriptions

If you no longer need to be notified when changes occur to a document, category, folder, or search criteria you subscribe to, you can delete the subscription on the *Subscriptions* page.

Deleting the subscription does not affect the document in any way.

To delete a subscription

1 On the BTRS home page, click the name of a subscription.

– or –

On the BTRS navigation bar, click **Subscriptions**.

The *Subscriptions* page appears.

2 Perform one or more of the following functions:

In this area	Click this
To delete a single subscription	Under the name of the document you want to delete, click **Delete subscription**
To delete all subscriptions	Under the title of the subscription you want to delete, click **Delete all subscriptions**

The subscription(s) are removed from the *Subscriptions* page and the BTRS home page, even if you have active notifications.

3 Creating and Managing Your Profile

As a BTRS user, you need to create a profile that contains information about you, where you work, what type of work you perform, and how you want to be contacted in the case an alert is sent to you. In addition, you can set and update passwords and codes to log on to BTRS and to confirm alerts as part of your individual profile.

Keeping the information in your profile up-to-date is critical to the success of the BTRS alerting system. As phone numbers, e-mail addresses, and job locations often change, BTRS prompts you periodically to verify your information. In addition, you may receive e-mail reminders to change your password or update your profile if your BTRS administrator requires you to do so.

When your system or BTRS administrator initially creates your account, he or she may provide some or all of your profile information. When you log on for the first time, you need to confirm and/or complete the information in your profile so that other BTRS users in your HAN can contact you and send you alerts.

Logging on for the First Time

The first time you log onto the portal, you must verify and complete the information in your profile before continuing.

You will need to do the following to complete your profile:

You can also change your password (see “Changing Your Password” on page 47) and set up your alert profile schedule (see “Scheduling Alerting Profiles” on page 44) after you complete your profile.

- Verify and/or enter your profile information – see “Maintaining Your Profile Information” on page 33
- Set an alerting security code – “Using Alerting Security Codes” on page 38
- Create an alerting profile – “Using Alerting Profiles” on page 40

A separate page automatically appears to assist you in entering the information for each of these profile elements.

Maintaining Your Profile Information

Your profile is one of the most important elements of BTRS. Use the *My Profile* pages to enter information about you, including your background, and your work and home contact information. When you enter information in your profile, you can receive alerts from others in your alerting network. In addition, information you enter on this page appears in the *My Directory* page so that others in your network with permissions can view your profile information to contact you.

When you complete and save your profile information, either for the first time or when you make changes, BTRS sends you an e-mail (to the e-mail address you specify) to confirm your changes.

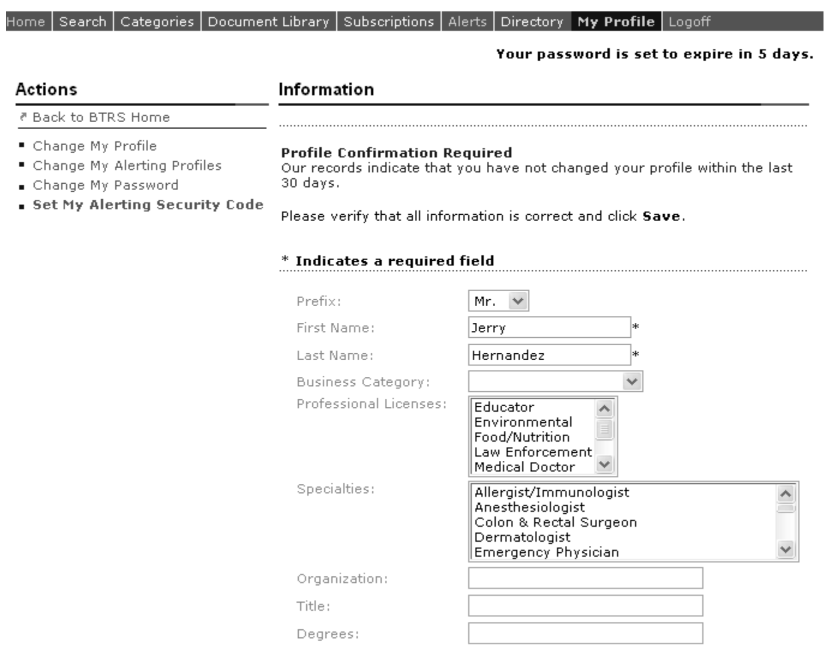
Creating Your Profile

When you log on to BTRS for the first time or after not modifying your profile for 30 days, the *Profile Confirmation Required* page appears. Enter information on this page to complete or update your profile.

To create your profile

1 Log on to the BTRS portal using the steps in "Logging on to the BTRS Portal" on page 14.

After you successfully log on, the *Profile Confirmation Required* page appears.



Missing or incorrectly formatted information is highlighted in yellow on the *Profile Confirmation Required* page to assist you in locating errors.

2 Enter the following personal information:

In this field or list	Do this
Prefix	Select **Dr.**, **Mr.**, **Ms.**, or **Mrs.**

In this field or list	Do this
First Name	Type your first name *This is a required field* *The only special characters BTRS recognizes are apostrophe and hyphen. Accents and other characters used in user names are currently not supported.*
Last Name	Type your last name *The only special characters BTRS recognizes are apostrophe and hyphen. Accents and other characters used in user names are currently not supported.*
Main Business Category	Select the type of industry that you work in
Professional Licenses	Select one or more professional licenses that you hold *Press* **CTRL** *while clicking to select more than one type*
Specialties	Select one or more medical specialties you practice *Press* **CTRL** *while clicking to select more than one type*
Organization	Type the name of your organization
Title	Type your professional title
Degrees	Type any degrees that you hold

3 Enter the following Work Contact information:

In this field or list	Do this
Work Location	Type information about where you work, such as Building 1045, Intensive Care Wing, or Sacramento
Work Address	Type the address of the facility you work in
Work City	Type the name of the city in which your facility is located
Work State/Province	Select the state or province in which your facility is located

In this field or list	Do this
Work Zip/Postal Code	Type the ZIP or Postal code for the facility in which you work *You must enter 5-10 characters*
Work Email	Type an active work e-mail address *This is a required field* Enter the complete address; for example: `joe_user@ca.gov` or `fred.smith@hospital.org`
Work Phone	Type your work phone number, including area code and any extension *You must enter at least 10 digits*
Work Fax	Type your work fax number, including area code *You must enter 10 digits*

4 Enter the following Home Contact information:

In this field or list	Do this
Home Address	Type your home address
Home City	Type the name of the city in which you live
Home State/Province	Select the state or province in which you live
Home Zip/Postal Code	Type the ZIP or Postal code for the city in which you live *You must enter 5-10 characters*
Home Phone	Type your home phone number, including area code *You must enter at least 10 digits*

5 Enter the following Alternate Contact information:

In this field or list	Do this
Alternate Email	Type an e-mail address other than your work e-mail address Enter the complete address; for example: `joe_user@ca.gov` or `fred.smith@hospital.org`
Cell Phone	Type your cell phone number, including area code *You must enter 10 digits*

In this field or list	Do this
Alpha Pager	Type the e-mail address of your alpha pager Enter the complete address; for example: `6498511022@pagerco.net`
Numeric Pager #	Type the phone number of your numeric pager *You must enter 10 digits*
Alternate Phone	Type a phone number other than that of your primary work, home, or cell phones, including area code *You must enter at least 10 digits*
Satellite Phone	Type the number of your satellite phone, including area code
Other Means of Contact	Provide information for any additional means people may use to contact you *This information can be an e-mail address, or a phone or fax number*

6 Enter the following Miscellaneous information:

In this field or list	Do this
Languages Spoken	Select one or more languages that you speak
CPR Certified	Select this check box if you are certified to perform cardio-pulmonary resuscitation (CPR)

7 Click **Save**.

The *User Profile Change Confirmation* page appears.

8 Click **OK**.

The *My Profile* page appears.

– or –

If you are logging on for the first time, the *Set My Alerting Security Code* page appears. Follow the steps in “Setting Your Alerting Security Code” on page 39 to set your alerting security code.

BTRS also sends you an e-mail to confirm the information you just entered.

Updating Your Profile Information

You can change your profile information at any time if your contact information changes, such as your office location, phone number, or e-mail address. In addition, if you do not make any changes to your profile, every 30 days BTRS will prompt you when you log on to verify your information and make any necessary updates. You may also recieve an e-mail notification reminding you to log in and verify your profile information.

To update your profile information

1. On the BTRS navigation bar, click **My Profile**.

   The *My Profile* page appears and displays your current profile information.

2. Under Actions, click **Change My Profile**.

   The *Change My Profile* page appears.

3. Using the steps in “To create your profile” on page 34 as a guide, make any changes to your profile.

4. At the bottom of the page, click **Save**.

   BTRS displays the message, “Profile successfully changed!”

5. Click **OK**.

   The *My Profile* page appears, and BTRS sends you an e-mail to confirm the changes you made.

Using Alerting Security Codes

The alerting security code is a four-digit number you enter to confirm an alert over the phone. When you receive an alert via a phone call at one of your designated phone numbers, you will be asked to enter this number to confirm your identity before the alert message will play.

Your alerting security code does not expire, but you can change the number at any time through the BTRS portal. You may also choose to have your BTRS administrator change your code for you.

Your alerting security code and your password (which you use to log into BTRS) have different values and are not used for the same purpose. For more information on passwords, see “Changing Your Password” on page 47.

Setting Your Alerting Security Code

As part of the profile confirmation process, the first time you log on to the BTRS portal, you will be prompted to create an alerting security code.

Set My Alerting Security Code page

The *Set My Alerting Security Code* page only appears when you log on for the first time, after you complete the steps in “Creating Your Profile” on page 34. To change an existing security alerting code, follow the steps in “Changing Your Alerting Security Code” on page 39.

▸ To set your alerting security code

1 On the *Set My Alerting Security Code* page, in the **New Alerting Security Code** field, type the four-digit alerting security code you want to use.

2 In the **Verify New Alerting Security Code** field, reenter your alerting code.

3 Click **Save**.

The *Alerting Security Code Change Confirmation* page appears.

4 Click **OK**.

The *Create an Alerting Profile* page appears. Use the steps in “Creating Alerting Profiles” on page 41 to create your alerting profile.

Changing Your Alerting Security Code

You can change your alerting security code at any time to another four-digit number, either for security reasons, or if you’ve forgotten the number.

▸ To change your alerting security code

1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

2 Under Actions, click **Change My Alerting Security Code**.

The *Change My Alerting Security Code* page appears.

3 In the **New Alerting Security Code** field, type the new four-digit alerting security code you want to use.

4 In the **Verify New Alerting Security Code** field, reenter your alerting code.

5 Click **Save**.

BTRS displays the message, “Alerting Security Code successfully changed for [your name]!”

6 Click **OK**.

The *My Profile* page displays, showing your current profile information.

Using Alerting Profiles

Depending on your organization’s alerting procedures and regulations, your organization may need to contact you with an alert at various times, even if you’re away from the office or at another location. After you set your alerting security code, you have the ability to create, edit, and activate several different alerting profiles to meet those needs. In addition, you can use the Alerting Profile Scheduler to set when each profile will be active.

About Alerting Profiles

Alerting profiles merely provide a way for you to tell BTRS how you want to be notified in case an alert is sent to you. BTRS allows you to create an automated list of contact methods, such as cell phone, e-mail, and pagers, for low, medium, and high profile alerts. In addition, you can specify which of those contact methods you want to use for each alert, based on the alert’s priority (low, medium, or high), and the order in which the alert is sent to each device.

You can create several different profiles that enable you to specify different scenarios for contacting you. For example, when you are at work, you may want to be notified of an alert through your work e-mail address and work phone. When you go home, however, or if you are called away from your office, you may opt to be notified through other methods, such as your home phone, cell phone, or pager. In addition, if you travel or plan a vacation, and will not be able to respond to alerts, you may want to create another profile that sends notifications to your work e-mail only, or does not notify you at all. By creating several alerting profiles, you need only to change your active alerting profile and designating times when each is active, you can automatically receive alerts at the proper location, 24 hours a day, 7 days a week.

Creating Alerting Profiles

The first time you log on to BTRS, you are prompted to create an alerting profile as part of the profile confirmation process. In addition, you can create additional profiles at any time. Creating an alerting profile enables your organization to alert you using the methods you designate. You can also set an alerting schedule that employs the profiles you create.

You may opt to not create an alerting profile when you first log on to BTRS. If you do not create any alerting profile, you will still receive an e-mail each time an alert is sent to your role.

To create an alerting profile

1 On the BTRS navigation bar, click **My Profile**.

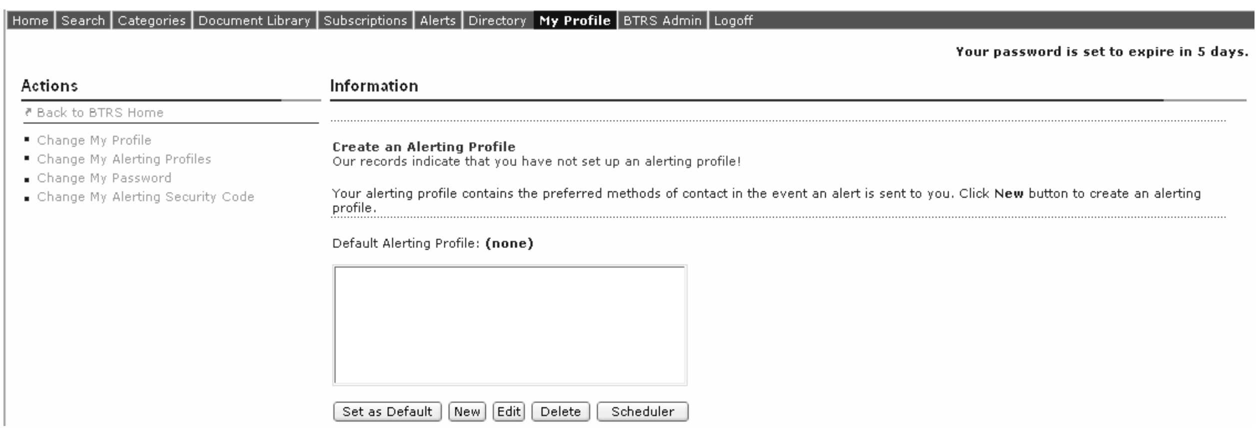
– or –

If you are logging on for the first time, after completing the steps in “To set your alerting security code” on page 39, skip to step 4.

The *My Profile* page appears.

2 Under Actions, click **Change My Alerting Profiles**.

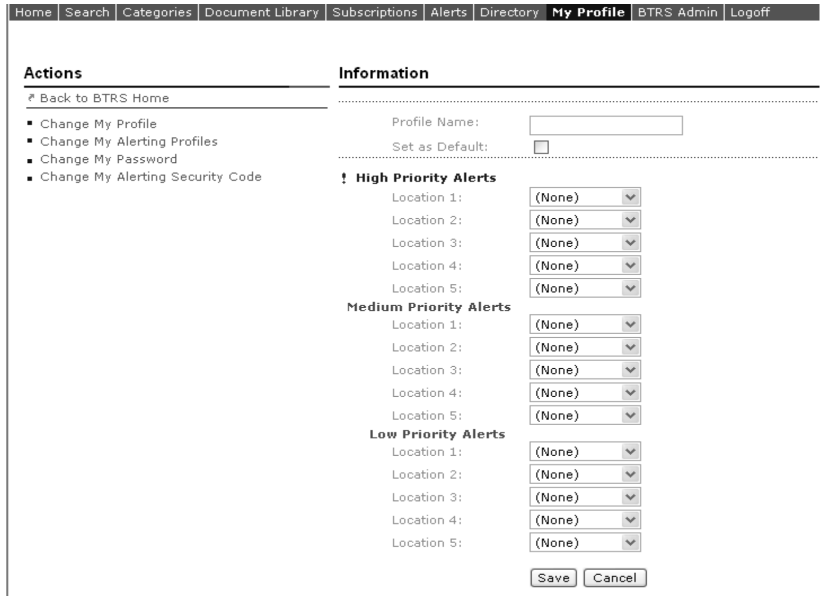
The *Change the Alerting Profiles* page appears.



If you are logging on for the first time, the *Create an Alerting Profile* page appears after you complete the steps in “To set your alerting security code” on page 39.

3 Click **New**.

The *Profile Name* page appears.



4 In the **Profile Name** field, type the name you want to give your alerting profile.

Create a name that accurately reflects the purpose of the profile, such as “daily,” “weekend,” “on call,” or “vacation.”

5 To set this as your default profile profile, select the **Set as default** check box.

6 Under High Priority Alerts, in the **Location** lists, select one or more contact devices you would like BTRS to send alerts to when high priority alerts are sent to you.

When an alert is sent to you, the device you select in the **Location 1** list will be contacted first; the device in the **Location 2** list will be contacted second, etc.

If you create and set as default an alerting profile in which you select **(none)** for all locations, you will *only* receive alerts on the BTRS portal.

---

7 Repeat step 6 for the Medium and Low Priority Alerts sections.

If you are logging on for the first time, you can now continue to the portal home page. Under Actions, click **Back to BTRS Home**.

8 Click **Save**.

The *Change My Alerting Profiles* page appears and displays the profile you created. You can assign the days and times you want the profile to be active, otherwise, BTRS activates your default profile.

Editing Alerting Profiles

You have the option at any time to edit your alerting profiles by changing how you want to be contacted for one or more alerting priorities.

To edit an alerting profile

1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

2 Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* page appears.

3 Select the alerting profile that you would like to change.

4 Click **Edit**.

The *Profile Name* page appears, and displays the profile's current information.

5 Make any necessary changes to your alerting profile.

6 Click **Save**.

BTRS saves your changes and displays the *Change My Alerting Profiles* page.

Deleting Alerting Profiles

When you no longer need to use a particular alerting profile, you can delete it so that it no longer appears in the alerting profile list. Deleting an alerting profile also removes it from your Alerting Profile Schedule.

To delete an alerting profile

1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

2 Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* page appears.

3 Select the alerting profile that you would like to delete.

4 Click **Delete**.

BTRS displays the message, "Are you sure you want to delete [name of alerting profile]?"

5 Click **OK.**

The alerting profile is removed from the alerting profile list.

Scheduling Alerting Profiles

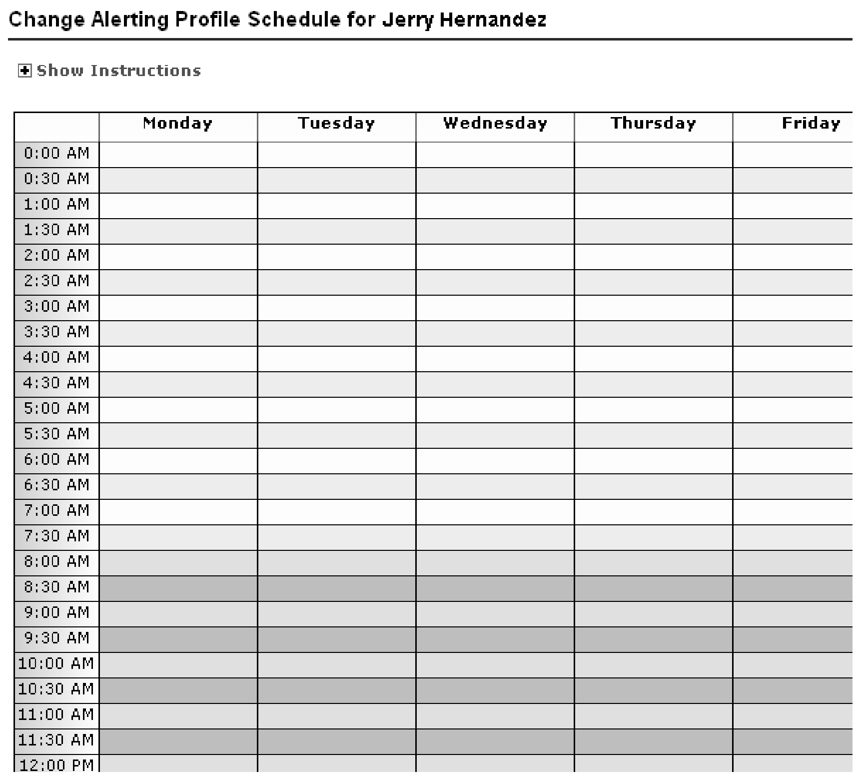
BTRS automatically activates alerting profiles using the days/times you specify in the Alerting Profile scheduler. During days/times that no profiles are scheduled to be active, your default profile will be activated. If you choose, you can opt to not use the Scheduler, and merely set a different default profile as necessary. BTRS sends alerts to the devices you select based on your active alerting profile.

If you choose to use the Alerting Profile Scheduler, BTRS will continue to automatically activate the alerting profiles you include until you remove them from your schedule.

To set your alerting profile schedule

1. Use the steps in “To create an alerting profile” on page 41 to create one or more alertiing profiles.
2. On the *Change My Alerting Profiles* page, click **Scheduler**.

   The *Change Alerting Profile Schedule for [name of user]* window opens.

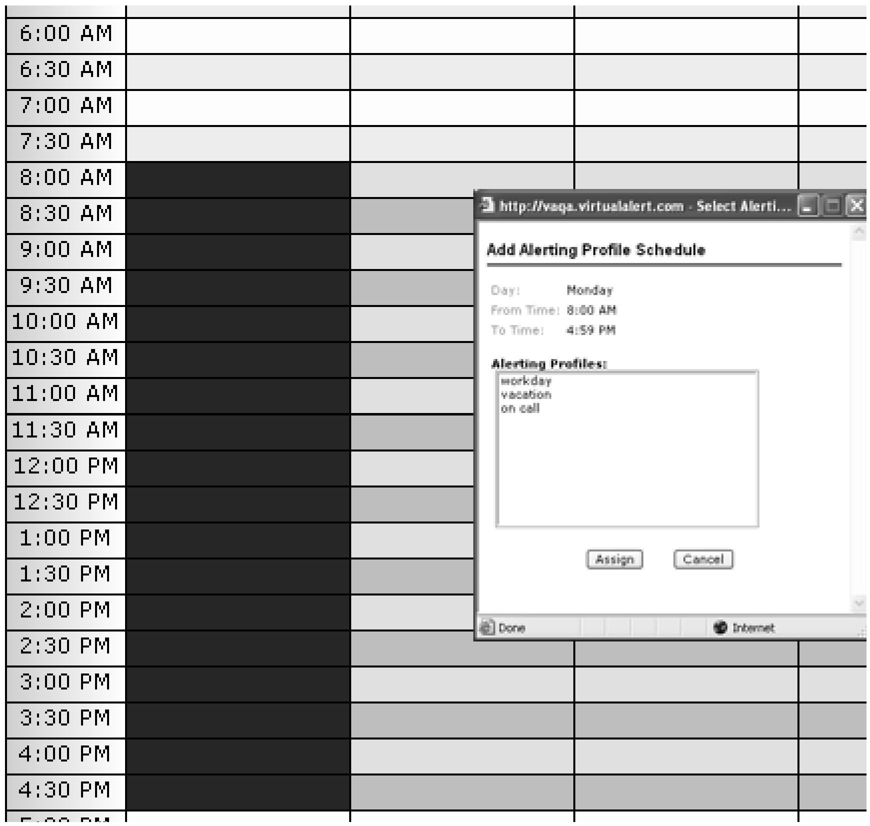


Change Alerting Profile Schedule window

3 Place your cursor over the day/time you want to activate an alerting profile, then click and drag to the time you want to deactivate the profile.

You can change the time period during which the profile is active at any time.

The *Add Alerting Profile Schedule* dialog box opens.

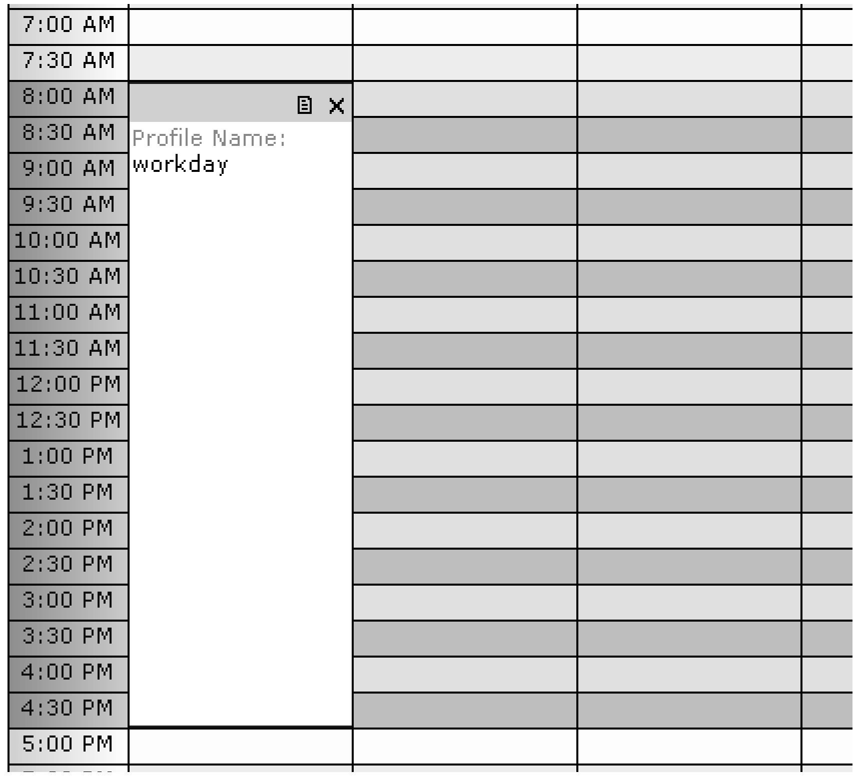


Add Alerting Profile Shedule dialog box

4 In the **Alerting Profiles** list, select the profile you want to activate for this time period.

5 Click **Assign**.

The *Add Alerting Profile Schedule* window closes, and the profile name appears on the schedule.



Change Alerting Profile Schedule window, with profile added

6 Repeat steps 3-5 to assign additional times.

7 To close the *Change Alerting Profile Schedule* window, click the **X** in the upper right corner of the window.

To edit your alerting profile schedule

1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

2 Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* page appears.

3 Click **Scheduler**.

The *Change Alerting Profile Schedule for [name of user]* window opens.

4 Perform one or more of the following functions.

To do this	Do this
Move an existing scheduled block	Place your cursor over the header of the block, then click and drag to the desired time period.
Change the hours assigned to an existing scheduled block	Place your cursor over the top of bottom border, then click and drag to adjust the time period.

To do this	Do this
Remove an existing scheduled block	Click the **X** in the upper right corner of the block
Assign a different profile to an existing scheduled block	Select the block, then click to display the View/Edit Alerting Profile Schedule window – or – click the [icon graphic] in the header of the block

5 To close the *Change Alerting Profile Schedule for [name of user]* window, click the **X** in the upper right corner of the window.

Changing Your Password

When your BTRS administrator creates your user account, he or she assigns a user name and password that you use to log into BTRS. Although your user name cannot be changed, you can change your password after you log on for the first time.

Before changing your password, be sure that you follow your organization's security guidelines or requirements for your password. Check with your BTRS administrator if you have any questions.

After you change your password successfully, BTRS requires you to log in using your new password.

Your password is not the same as your alerting security code, which is the four-digit number you use to identify yourself on the phone when you receive an alert. For more information on alerting security codes, see "Setting Your Alerting Security Code" on page 39.

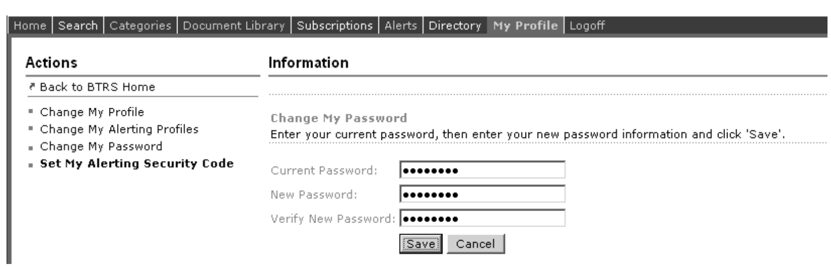
To change your password

1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

2 Under Actions, click **Change My Password**.

The *Change My Password* page appears.



3 In the **Current Password** field, type your existing password.

4 In the **New Password** field, type the new password you want to use.

5 In the **Verify New Password** field, reenter your new password.

6 Click **Save**.

BTRS displays the message, “Are you sure you want to change your password?”

7 Click **OK**.

BTRS displays the message, “Password successfully changed!”

8 Click **OK**.

The *Connect to [BTRS portal URL]* dialog box displays.

9 Using your new password, log on to the BTRS portal.

4 Using the Document Library

The Document Library section of the BTRS portal acts both as a storage facility for your organization's documents and as an arena for drafting, discussing, working with others on, and approving documents for publication. In the library, you can share documents as you might on an Intranet or network, but you can also check in drafts you are still working on, so that other users will not be able to view those documents. In addition, each folder in the library can have different levels of security applied; this means that confidential data is only made available to the appropriate BTRS users.

The Document Library enables you to:

- Control document access based on role-based permissions
- Apply descriptions to document properties to help make documents searchable
- Control document publishing based on user permissions
- Use Web discussions to incorporate online comments from multiple document reviewers
- Track and view a document's publishing history

Before you begin working in the Document Library, take a moment to read about and understand how the library works and what types of permissions are available. When you are ready, read on to learn more about working with both folders and documents.

Understanding Document Library Permission Levels

If you have a BTRS Admin license and rights to publish content to the portal home page, you can publish documents to those folders through the Document Library. For more information about publishing content on the home page, see the *Administrator Guide*.

If you have either a BTRS Collaboration or BTRS Administration license, you can view and access the Document Library section of the BTRS portal. Users with BTRS Alerting licenses do not see this link on the BTRS navigation bar.

When you access the Document Library, you can search for, read, add, edit, discuss, and/or delete documents and folders based on your permission level for that folder. In addition, each folder may or may not include approval routing, which enables folder administrators to require that specific users approve each document before it can be published to that folder.

Keep in mind that while you may be assigned one type of permission for a particular folder, you may be assigned another for a second folder, and so on.

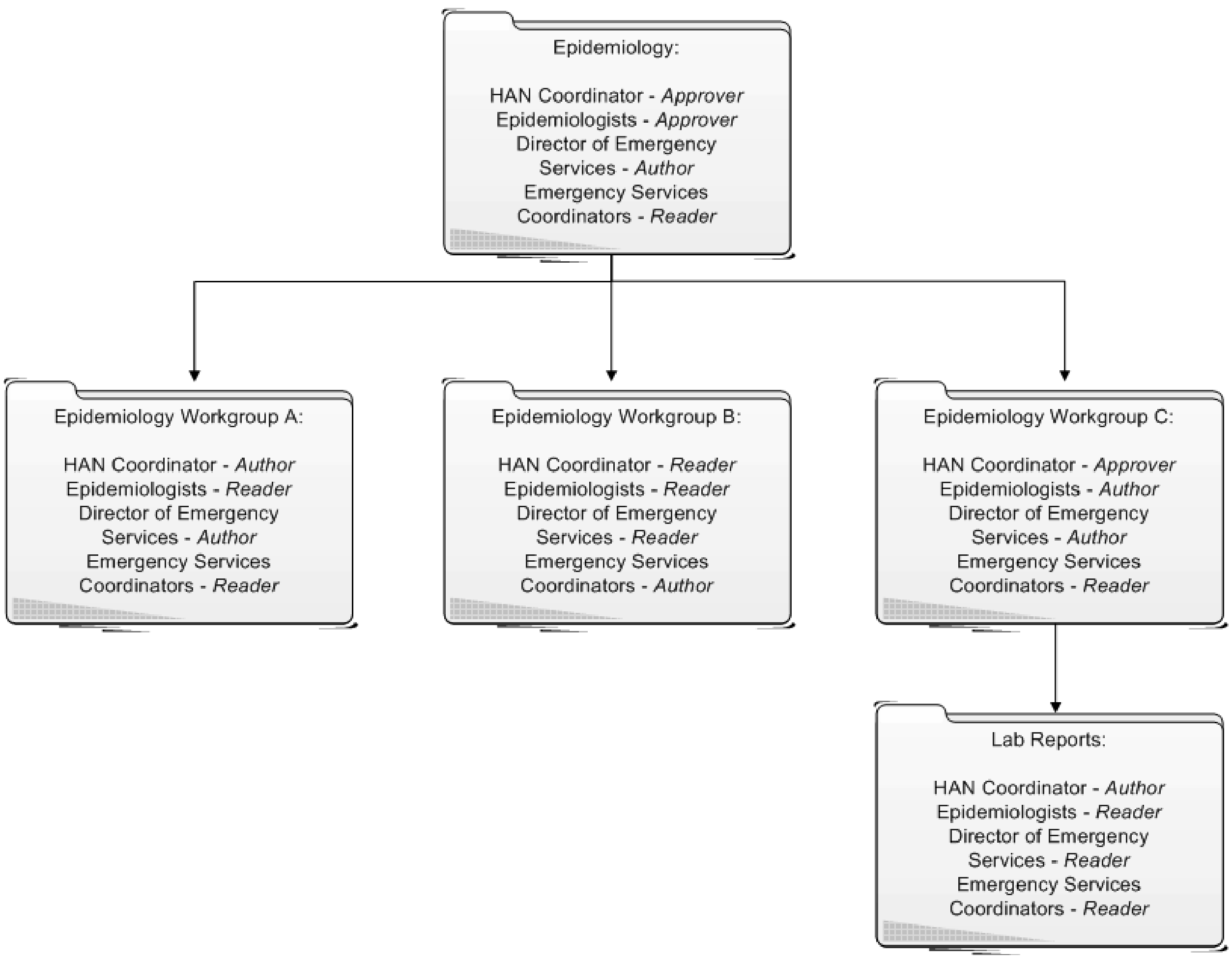
The following table describes the kinds of functions you can perform in a folder for each permission level:

This permission level	Can do this		Cannot do this	
	In folders	**In documents**	**In folders**	**In documents**
Reader	• View folders	• Search for and read published documents • Subscribe to folders and documents • Participate in document discussions	• Add, delete, or rename folders	• Check-out, add, edit, or delete documents • View checked-in versions of documents
Author	• Create, rename, and delete folders	• Subscribe to folders and documents • Participate in document discussions • Search for, read, add new, edit, and delete all drafts and published documents	• Change user permissions of folders that they create	
Admin	• Create, rename, and delete folders • Assign approval routing for folders they administer • Assign permissions for folders they administer	• Subscribe to folders and documents and participate in document discussions • Search for, read, add new, edit, delete all drafts and published documents		
Approver (can be either Reader, Author, or Admin)		• Approve or reject documents submitted to that folder for publication		

Putting Document Library Permission Levels to Work

The first step to working successfully in the library is understanding the parent/child relationship between folders. While the next section "Working with Folders and Categories" covers working with folders in more detail, the following diagram shows a sample Document Library environment with several folders, each with different permissions assigned to various roles. Use this diagram as reference for different scenarios your organization might have.

You can confirm what access permissions you have for a particular folder by looking at the **Current Folder Rights** section near the top of each folder's page.



Sample folder directory in the Document Library with assigned folder permissions

Working with Folders and Categories

Both categories and folders provide structure for your documents in the Document Library. Planning and maintaining your folder structure is a very important element of creating an efficient workspace for you and your coworkers. Depending on the Document Library permission levels you have, BTRS enables you to create, rename, or delete folders. In addition, if a folder contains information you particularly need to know about and stay current with, you can subscribe to that folder and be notified when new documents are posted or when changes are made.

Understanding Categories

For more information about how categories work, see “Categories” in Chapter 2, page 22. For information about assigning categories to documents you post on the portal, see “Adding Documents to the Library” on page 58.

Categories provide another method for you to organize your documents. You can assign categories to each document you post to the Document Library, to help locate and sort documents. You can create categories based on the document’s function (such as calendar, memo, or report), by the users in a role who need to access the document (such as workgroup, task force, or management), or the document’s topic (such as smallpox, homeland security, or emergency services).

Standard and Enhanced Folders

Within the Document Library, two types of folders are available: standard and enhanced. While both folders enable you to further your document organization, enhanced folders provide additional functionality, including document check in, publishing, and version history.

The following table shows which document features each folder type supports:

This folder type		Supports these elements			
		Profiles	**Check in/out**	**Publishing**	**Version history**
	Standard	X			
	Enhanced	X	X	X	X

Creating Folders

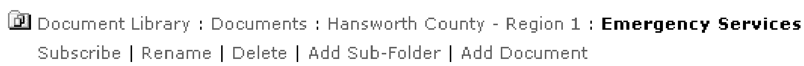
When BTRS is installed, the Document Library section contains three folders: Dashboards, Documents, and Portal Content. While the Dashboards and Portal Content folders are used primarily by BTRS administrators, the Documents folder provides access to the entire Document Library structure. Based on your permission level access for each folder within this structure, you may be able to create subfolders in the library to store your documents.

You can confirm what access permissions you have for a particular folder by looking at the **Current Folder Rights** section near the top of each folder's page.

To create folders

1. In the Document Library, open the folder in which you want to create a subfolder.

   For example, if you want to create a new folder within the Emergency Services folder, click the Emergency Services folder link to display its contents. The current folder name displays in bold.

   The *Document Library* page updates to reflect the folder's structure.

2. Under the folder's path, click **Add Sub-Folder**.

   The *Create a new folder* page appears.

3. In the **Enter the name for this folder** field, type the name for your new folder.

4. Click **Create**.

   The *Document Library* page appears and displays the new folder.

Renaming Folders

In folders where you have permission to do so, you can update the name of the folder, and your documents will remain in the folder with its new name.

When you rename a folder, all Web discussions associated with documents in that folder are removed. If you want to retain your previous discussions, delete the documents from the folder, and publish them to the renamed (or new) folder. For more information about discussing documents, see "Discussing Documents" on page 69.

To rename a folder

1. In the Document Library, open the folder that you want to rename.

   For example, if you want to rename the Emergency Services folder, click the Emergency Services folder link to display its contents. The current folder name displays in bold.

   Document Library : Documents : Hansworth County - Region 1 : **Emergency Services**
   Subscribe | Rename | Delete | Add Sub-Folder | Add Document

   The *Document Library* page updates to reflect the folder's structure.

2. Under the folder's path, click **Rename**.

   You can confirm what access permissions you have for a folder by looking at the **Current Folder Rights** section near the top of each folder's page.

   This option does not appear if you do not have permission to rename the folder.

   The *Rename a folder* page appears.

3. In the **Enter the new name for the folder** field, type the new name you want the folder to have.

4. Click **Save**.

   The *Document Library* page appears and displays the renamed folder.

Deleting Folders

If you have Admin permissions in a folder (as well as in all that folder's subfolders), you can delete the folder and its contents, including discussions.

When you delete the folder, you will also delete any documents in that folder, as well as subfolders and those folders' contents.

To delete a folder

1. In the Document Library, open the folder that you want to delete.

   For example, if you want to delete the Emergency Services folder, click the Emergency Services folder link to display its contents. The current folder name displays in bold.

   Document Library : Documents : Hansworth County - Region 1 : **Emergency Services**
   Subscribe | Rename | Delete | Add Sub-Folder | Add Document

   The *Document Library* page updates to reflect the folder's structure.

2. Under the folder's path, click **Delete**.

   You can confirm what access permissions you have for a folder by looking at the **Current Folder Rights** section near the top of each folder's page.

   This option does not appear if you do not have permission to delete the folder.

   BTRS displays the message, "Are you sure that you want to delete this folder and all of its contents?"

3 Click **OK**.

The *Document Library* page updates to reflect that the folder has been deleted.

Subscribing to Folders

For more information about creating subscriptions, clearing subscription notifications, or deleting subscriptions, see "Working with Subscriptions" in Chapter 2, page 27.

If a folder contains several documents that cover a topic you are particularly interested in or need to keep abreast of, you can subscribe to that folder and be notified when:

- Changes are made to published documents in that folder or any subfolders
- New documents are published to that folder or any subfolders

Subscription notifications appear on the BTRS portal home page. In addition, you can also request that notification be sent to your e-mail address; you have the option to receive e-mail notifications as changes occur, or to receive daily or weekly notifications. To create a subscription, see "Creating Subscriptions" on page 28.

Working with Documents

Within the folders of the Document Library, you can post several types of files for a variety of purposes. You can choose to check in a document that is in progress, or publish the document so that other users may view it. In addition, you can participate in discussions for a particular document, fax the document to other BTRS users, and edit and update your document's profile and file.

Types of Documents

By default, each folder in the Document Library enables you to publish base – or standard – documents. Base documents can represent several different types of files, including documents, graphics, databases, and spreadsheets. In addition, your BTRS administrator may enable additional types of document profiles that you can use to associate with your files.

The Web Link, Announcement, and News Item profiles in the Document Library are only document *types*, and do not correlate in any way to the News, Announcements, and Quick Links sections of the BTRS home page.

For this type of document	You can create this kind of profile
Base document	Standard document in the Document Library (can be document file, such as .doc, .xls, .pdf, .ppt, .mdb, .htm, or .txt; or graphics file, such as .bmp, .gif, or .jpg)

For this type of document	You can create this kind of profile
Web link	Link to a page of a Web site
Announcement	Standard document (see above), but does not include category or description options
News Item	Standard document (see above), but does not include category or description options

Viewing Documents in the Library

If you have permission to do so, you can view folders and documents in the Document Library and Categories sections of the BTRS portal. Depending on what document profile is assigned to the document, and whether the document is stored in an enhanced or standard folder, you can also view information about the document, including its status and publishing history. In addition, you may be able to check in or out, rename, update the profile for, and/or publish the document.

Understanding Document Library Icons

While working in the Document Library section you may see documents in various stages of publication. Look for the following icons under document names to easily recognize these stages:

This symbol	Means this
	The document must be approved by one or more designated approvers before any action can be taken
	The document has been published to the Document Library
	The document is currently checked out to a user

Checked-in documents do not have an associated icon.

In addition, each document posted in the library displays the icon of application in which it was created.

For example, documents created using Microsoft Word display the  icon next to the document title.

Showing Available Actions

For every document checked in or published to the Document Library, you can perform one or more functions, including checking out, deleting, or viewing the document's publishing history. What actions you can perform are determined by your permissions in that folder, and the document's status.

The following table describes each possible action you can select for a document, and the results of selecting that action:

Click this	To do this
Back to previous view	Return to the folder or category in which your document is stored
Delete	Remove the document from the Document Library (no recovery)
Rename	Display the *Rename a document* page
Check Out	Display the *Check out a document* page
Check In	Display the *Check in a document* page
Undo Check Out	Restore the document to the portal in its previous state (no changes saved after check out)
Publish	Display the *Publish a document* page
Version History	Display the *Version history* page

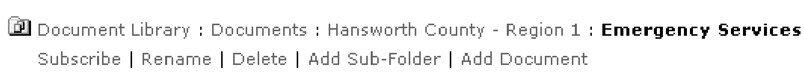
Viewing Document Version History

For each document checked in or published to an enhanced folder in the Document Library, you can view both the document's publishing history and the document's contents at each stage of the publishing process.

To view a document's version history

1 In the Document Library, open the folder that contains the document for which you want to view document history.

For example, if you want to open the Emergency Services folder, click the Emergency Services folder link to display its contents. The current folder name displays in bold.



2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

3 Under Actions, click **Version History**.

The *Version history* page appears, displaying the publishing history of your document.

4 To review the contents for any version of the document, click the link for the version number you wish to view.

Adding Documents to the Library

You have the ability to post documents to the Document Library in one of two ways: either by checking in a draft version of your document, or by publishing it to the portal. Checking in a document enables you to save a working version of the document on the portal without publishing it for all readers of that folder. Only those with permission to access checked in documents are able to view the document. When you are ready to present your final version, you can publish your document in the folder. All users with permission to view the folder can then view your published document.

Check in and publishing features are only available in enhanced folders. For more information about standard and enhanced folders, see “Standard and Enhanced Folders” on page 52.

Using either method, you can provide information about your document that helps those with permission to view your document to locate the document on the portal and determine the document’s purpose.

Checking In Documents

You can check in your document drafts to enhanced folders as you are working on them to save versions and enable other users to provide feedback using Web discussions. Only those users with Author or Admin permissions in the folder may view checked-in documents.

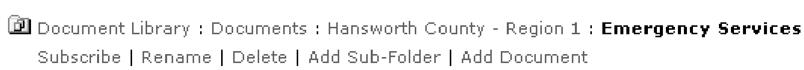
You can either check in a new document to the library, or check in a document you have already checked out.

You must have Author or Admin permissions for the folder to check in documents (and view checked-in documents).

To check in a new document

1. In the Document Library, open the folder you want to check the document into.

   For example, if you want to check a document into the Emergency Services folder, click the Emergency Services folder link to display its contents. The current folder name displays in bold.

2. Under the path of the folder, click **Add Document**.

   The *Add a document* page appears.

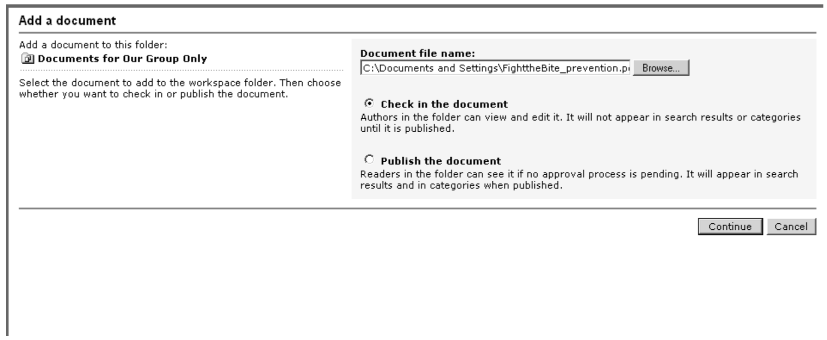
3. Next to the **Document file** name field, click **Browse**.

   The *Choose file* dialog box opens.

4. Navigate to and select the file that you want to check in.

5. Click **Open**.

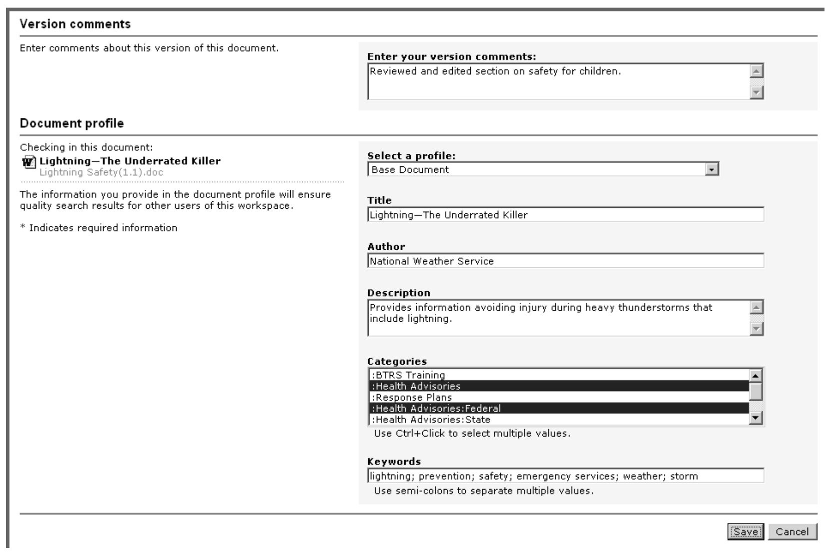
   The *Choose file* dialog box closes, and the document path appears in the *Document file* name field.



6 Select the **Check in the Document** option.

7 Click **Continue**.

The *Document Profile* page appears.



8 Under Version comments, in the **Enter your version comments** field, type any information about this draft that will help other users know the status of your document.

This information appears on the *Version history* page.

9 Under Document Profile, in the **Select a profile** list, select **Base Document** from the available options.

You may also select Web Link, News Item, or Announcement if the profiles are available for that folder. For more information about document types, see "Types of Documents" on page 55.

10 In the **Title** field, type the document name you want to display in the library.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, **Description**, and **Keywords** fields on this page.

11 In the **Author** field, type the name of the person who either created or is responsible for this document.

12 In the **Description** field, type any comments or introductory information about this document that will help others to identify it.

This information displays under the name of the document when it is posted.

13 In the **Categories** list, select one or more categories to which this document should be assigned.

To select more than one category, press the **CTRL** key while clicking. To deselect a category, press **CTRL** and click the category again.

14 In the **Keywords** field, type one or more words that users can type to search for your document.

Type a semicolon between entries.

15 Click **Save**.

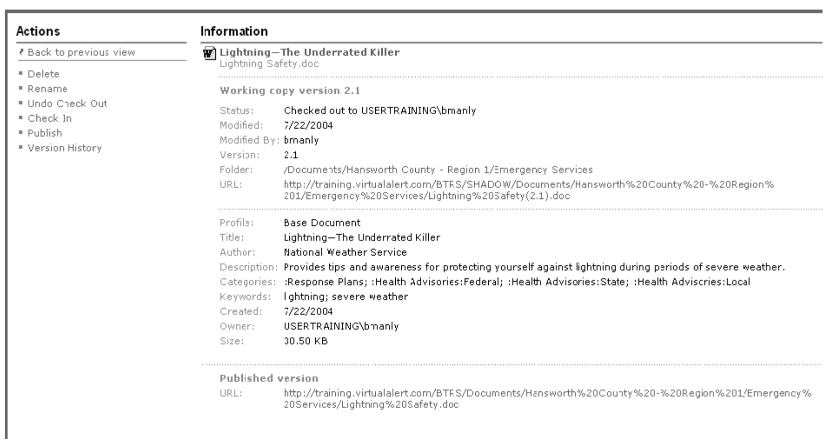
The *Document Library* page appears and displays your document as checked in.

To check in a checked out document

1 In the Document Library, open the folder that contains the document you checked out.

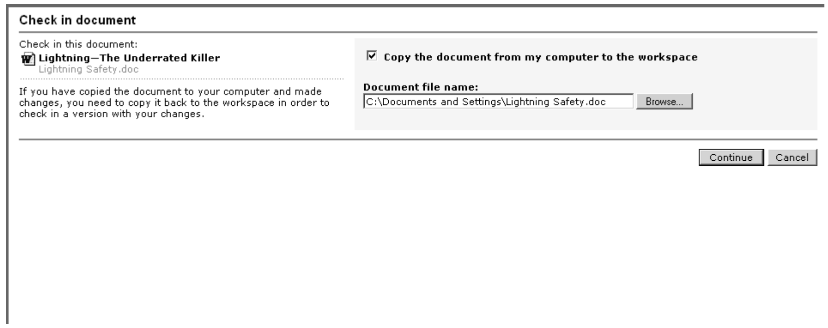
2 Under the name of the checked out document, click **Show Actions**.

The *Document Inspection* page appears.



3 Under Actions, click **Check In**.

The *Check in document* page appears.



4 Make sure the **Copy from my computer to the workspace** check box is selected.

If you do not select the check box, the updated file on your computer is not uploaded to the portal.

5 Next to the **Document file** name field, click **Browse**.

The *Choose file* dialog box opens.

6 Navigate to and select the file that you want to check in.

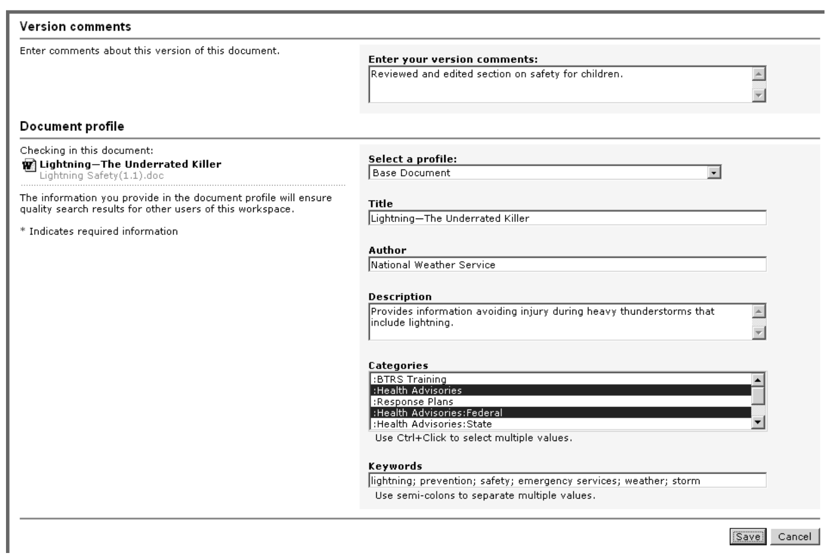
7 Click **Open**.

The *Choose file* dialog box closes, and the document path appears in the Document file name field.

8 Click **Continue**.

The *Document Profile* page appears.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, **Description**, and **Keywords** fields on this page.



9 Make any necessary changes to the document's profile and version comments.

10 Click **Save**.

The *Document Inspection* page appears and displays your document as checked in.

Publishing Documents

When you are ready to, you can publish your document to enhanced folders so that other users can view it and provide feedback using Web discussions.

Only those users with permissions to view the folder may view the document. Even if you add document profile information, users without permission will not see the document in any category or search results.

You can either publish a new document to the library, or publish a document you have already checked in. You can also publish a document you have checked out, but not yet checked back in.

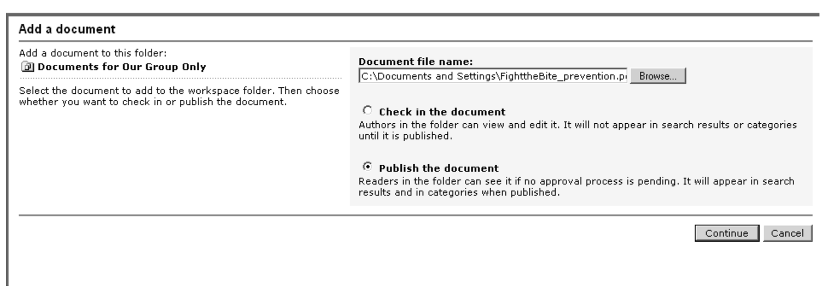
You must have permission to add documents to the folder before you can publish documents. In addition, if the folder has been assigned approval routing, the document must be approved before it can be published. For more information about folder permissions, see “Putting Document Library Permission Levels to Work” on page 51. For more information about approval routing, see “Approving and Rejecting Documents” on page 64.

▸ To publish a new document

1 In the Document Library, open the folder to which you want to publish the document.

2 Under the path of the folder, click **Add Document**.

The *Add a document* page appears.



3 Next to the **Document file** name field, click **Browse**.

The *Choose file* dialog box opens.

4 Navigate to and select the file that you want to publish.

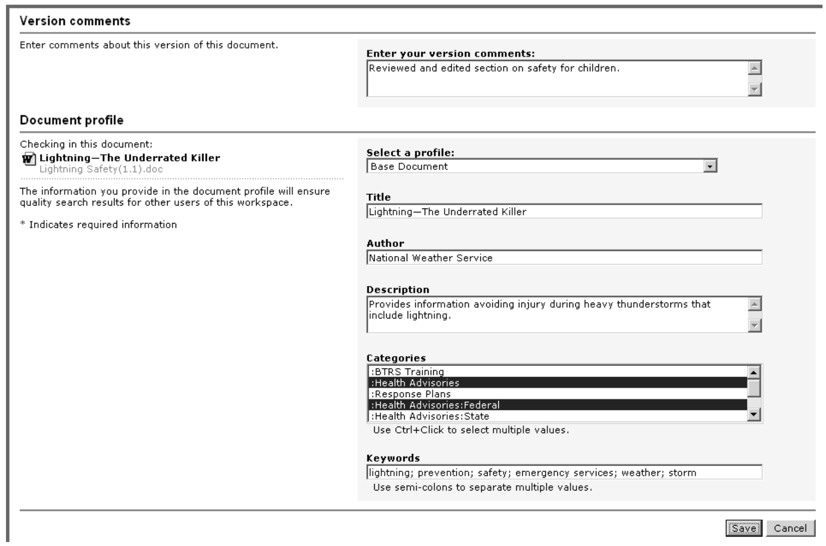
5 Click **Open**.

The *Choose file* dialog box closes, and the document path appears in the **Document file name** field.

6 Select the **Publish the Document** option.

7 Click **Continue**.

The *Document Profile* page appears.



8 Under Version comments, in the **Enter your version comments** field, type any information about this published document that will help other users recognize the status of your document.

This information appears on the *Version History* page.

9 Under Document Profile, in the **Select a profile** list, select **Announcement**, **Base Document**, **News Item**, or **Web Link**.

Depending on the profiles assigned to the folder, one or more of these options may not appear in the list.

10 If you selected **Web Link** in step 9, in the **Link** field, type the URL that you want to display when the user clicks the name of the document.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, **Description**, and **Keywords** fields.

11 In the **Title** field, type the document name you want to display in the library.

12 In the **Author** field, type the name of the person who either created or is responsible for this document.

13 In the **Description** field, type any comments or introductory information about this document that will help others to identify it.

This information displays under the name of the document when it is posted.

14 In the **Categories** list, select one or more categories to which this document should be assigned.

This list only appears if you are posting a Base Document or Web Link.

To select more than one category, press the **CTRL** key while clicking. To deselect a category, press **CTRL** and click the category again.

15 In the **Keywords** field, type one or more words that users can type to search for your document. Type a semicolon between entries.

This field only appears if you are posting a Base Document.

16 Click **Save**.

The *Document Library* page appears and displays your document as published.

To publish a previously posted document

1 After completing either set of steps in “To check in a new document” on page 58 or “To publish a new document” on page 62, open the folder that contains the document you want to publish.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

If the document is currently checked out, the *Publish document* page appears. Follow the steps in “To publish a new document” on page 62 to complete the publishing process.

3 Under Actions, click **Publish**.

BTRS displays the message, “Are you sure that you want to publish this document?”

4 Click **OK** to publish the document.

The *Document Library* page appears and displays your document as published.

Approving and Rejecting Documents

As you complete your documents, you may want to publish those finished documents to the BTRS portal. Depending on your organization’s structure and preferences, some folders in the Document Library may be assigned approval requirements for all documents published to that folder. Folders may have one or more users assigned as approvers. Each approver has the ability to approve or reject each document added to the folder.

Approval routing is the only type of permission in BTRS that is set by individual user, rather than by role or by role group.

About Approval Routing

In enhanced folders, users who have been selected as approvers for that folder act as reviewers for all documents published to the folder. Before any content can be published, each designated approver must approve the document; when the final approval is made, the document is automatically published.

For more information about setting approval routing for a folder, see the *Administrator Guide*.

For each enhanced folder, the folder administrator(s) can select one of four reviewing methods:

For this method	Approval must follow this order
No approval required	None (set by default)
Everyone must approve (parallel)	All persons selected must approve the document, in any order
Only one approval needed	Any one of the selected persons must approve the document
All must approve in assigned order (serial)	All persons selected must approve the document, in the order they appear in the **Approvers** list As the document is approved, only one approver at a time will see the document in the **Awaiting Your Approval** list on the home page

Special icons appear under documents that have been published, those waiting for approval, and those that are checked out. For more information about what the icons represent and what they look like, see "Understanding Document Library Icons" on page 56.

Approving Documents

When you review a document waiting for approval and make the decision to publish it, you can approve it for publication on the portal.

To approve a document for publication

1 On the BTRS home page, under the name of the document waiting to be approved, click **Approve/Reject**.

The *Document Inspection* page appears.

2 Under Actions, click **Approve**.

BTRS displays the message, “Are you sure you want to approve this document?”

3 Click **OK**.

If you are the final (or only) approver for the document, the *Document Inspection* page updates to reflects the published document.

– or –

If the document requires additional approval, at the bottom of the page, the Approval Status and names of the document approvers displays.

In either case, the document no longer appears in the *Awaiting Your Approval* section of your BTRS home page.

Rejecting Documents

If you review a document waiting for approval and make the decision not to publish it, you can reject the document.

When you reject a document, regardless of how many approvers are designated, the approval process is canceled. The document displays in the Document Library as checked in until the author attempts to publish the document again; at that time, the document must go through the approval process again.

▸ To reject a document for publication

1 On the BTRS home page, under the name of the document waiting to be approved, click **Approve/Reject**.

The *Document Inspection* page appears.

2 Under Actions, click **Reject**.

BTRS displays the message, “Are you sure you want to reject this document?”

3 Click **OK**.

The *Document Inspection* page updates to reflects the document as checked in. The document no longer appears in the *Awaiting Your Approval* or *Pending Approval* sections of the BTRS home page for any user.

Editing Documents

After a document has been checked in or published, you can make changes to the document’s content or to its profile as needed. To make changes to a document’s content, you can check out the document, work on the file on your computer, and then check in or publish the updated document. You can also collaborate with other users to discuss a document online. In addition, you can change both the name of the document file and the document’s title.

To make any changes to the document or its profile, you must be assigned Author or Admin permissions for the folder in which the document is stored.

Checking Out Documents

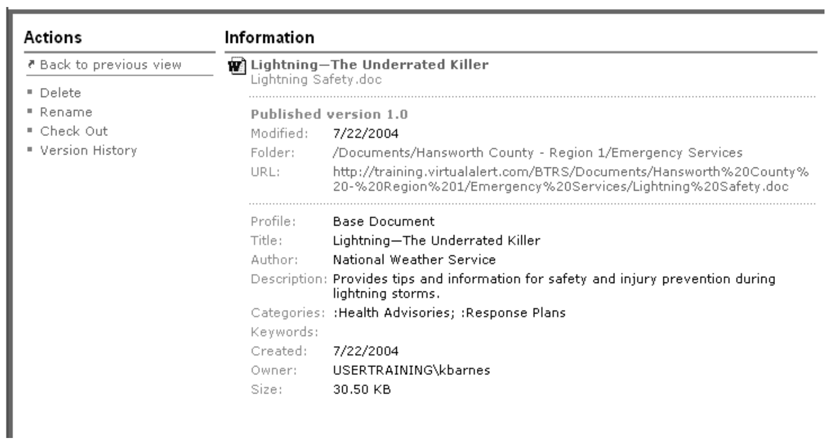
When you need to make updates to a document already posted on the BTRS portal, you can check the document out. Checking out a document allows only that user to make changes. While other users may still view the previous version of the document, only the user who has checked out the document can save changes to the BTRS portal.

To check out a document

1 In the Document Library, open the folder that contains the document you want to check out.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.



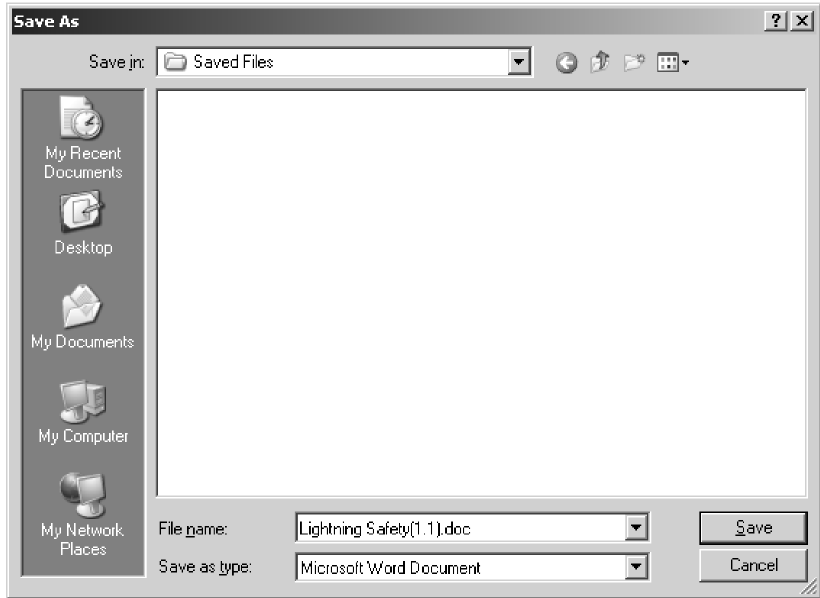
3 Under Actions, click **Check Out**.

The *Check a document out* page appears.

4 Right-click the name of the document and click **Save Target As**.

You may see similar options instead, such as Save As or Save.

The *Save As* dialog box opens.



5 Locate the folder in which you want to save the file, and click **Save**.

By default, BTRS includes the version number of document in the file name to assist in tracking the document's version history.

6 When the file download is complete, in the *Download Complete* dialog box, click **Open** to view the document.

– or –

Click **Close** to close the *Download Complete* dialog box.

Editing Document Profiles

When you check in or publish a document, you can include document profile information, including the name of the document and author, as well as assign category, description, subject, and/or keyword information to make the document easily searchable.

To make changes to a document's profile after it is posted, you must either check the document out and back in, or republish the document, to access the *Document Profile* page.

Use the steps in the following sections to edit a document's profile:

To edit the document profile by:	Follow these steps:
Checking out, then checking in the document	• "Checking Out Documents" on page 67 • "Checking In Documents" on page 58
Checking out, then publishing the document	• "Checking Out Documents" on page 67 • "Publishing Documents" on page 62

If your organization manages document profiles in Microsoft® Word, Excel, PowerPoint, etc., you can check the document out, make the document properties changes in the original application, and then resubmit your document, as the information in the document properties automatically populates the **Title**, **Author**, **Description**, and **Keywords** fields.

Renaming Documents

If you have permission to do so, you can change the name of the document file after it has been checked in or published.

This process does not cover changing the **title of the document** (such as "2004 Schedule of EMT Required Training Courses"), but rather the **name of the file** (such as "2004 class schedule.doc"). For more information about changing the title of a document, see the previous section, "Editing Document Profiles" on page 68.

To rename a document file

1. In the Document Library, open the folder that contains the file you want to rename.
2. Under the name of the document, click **Show Actions**.

   The *Document Inspection* page appears.
3. Under Actions, click **Rename.**

   The *Rename a document* page appears.
4. In the **Enter a new name for this document** field, change the file name.
5. Click **Save**.

   The *Document Inspection* page appears and displays the updated file name.

Discussing Documents

Using Web discussions, you can post online comments about a document without modifying it. Instead of using e-mail to discuss or capture feedback for a document, authors and reviewers can communicate with each other through Web discussions on the portal. Even if another user has checked out the document, you can post comments or work with others to provide feedback that other reviewers or the author can use in making changes to the document. BTRS stores comments as threaded conversations, showing comments and replies together for easy review.

The discussion threads you create for a document remain with the document until you clear them, even if you rename, check in/out, or republish the document. Discussions are removed, however, if the folder containing the document is renamed. For more information, see "Renaming Folders" on page 53.

When you have a document open for discussion, you can also choose which elements of a comment to view, as well as which comments you want to see.

If you are using Microsoft® Office XP, make sure your computer is properly configured before using this feature. If you are unsure about your computer’s configuration, check with your BTRS administrator before continuing.

Adding Discussion Comments to a Document

The Discussions feature in BTRS enables you to both efficiently work with other users as well as track others’ comments on a document checked in or published to the BTRS portal. When you post a document, users with permission to view your document can open the document, add discussion comments, and respond to others’ comments quickly, without modifying the document itself.

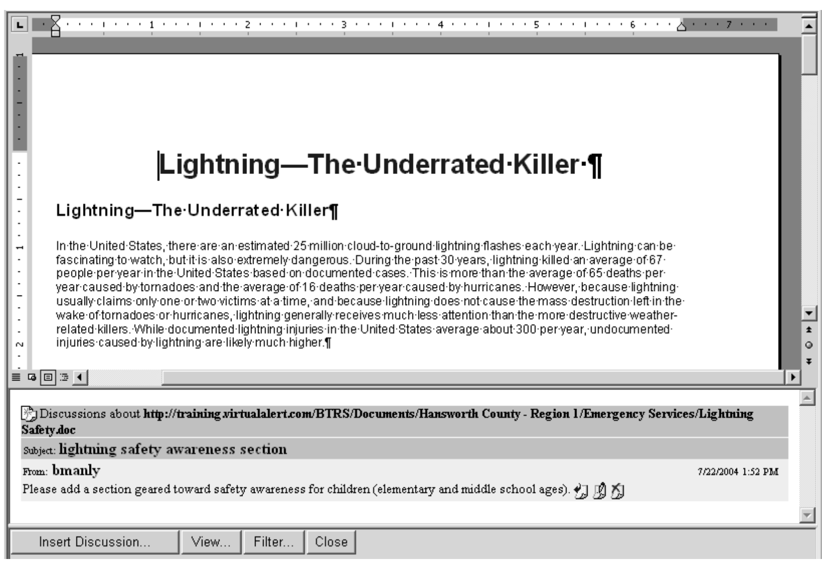
To add discussion comments to a document

1 In the Document Library, open the folder that contains the document you want to discuss.

2 Under the name of the file, click **Discuss**.

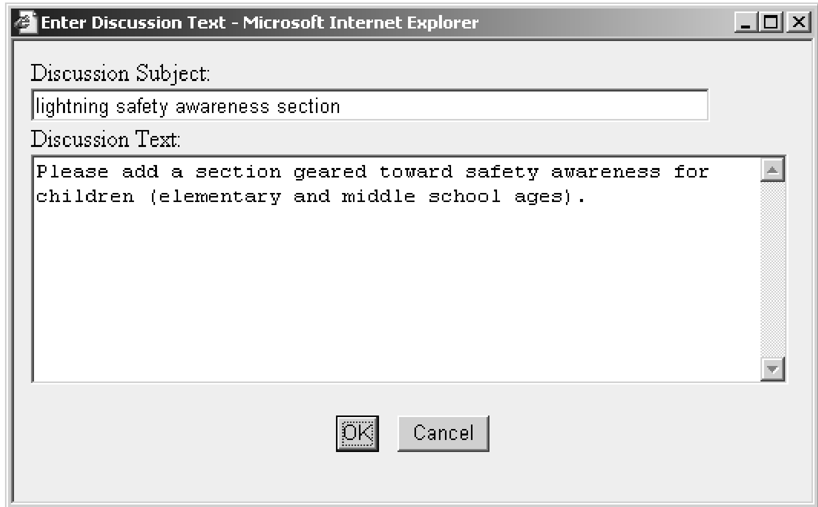
The document opens in a new window, and displays the Discussions pane at the bottom of the window.

Depending on the applications you have installed on your computer, you may be prompted to either open or save the file to your computer before continuing. Click **Open** to display the document in the *Discussions* window.



3 In the Discussion pane, click **Insert Discussion**.

The *Enter Discussion Text* dialog box opens.



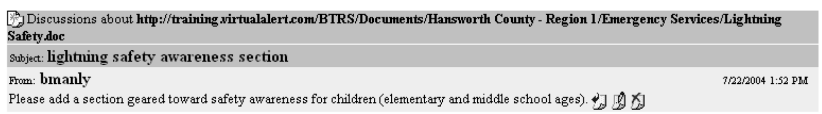
4 In the **Discussion Subject** field, type a brief subject for this comment.

This text appears in bold in the Discussion pane.

5 In the **Discussion Text** field, type the text of your comment.

6 Click **OK**.

The *Enter Discussion Text* dialog box closes. The message subject, text, author name, and date and time appear in the Discussion pane.



Editing Existing Discussion Comments

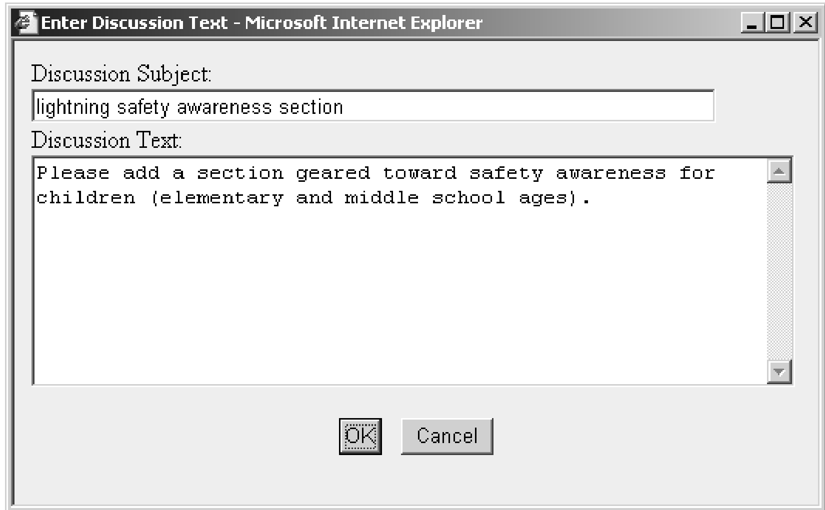
After posting a discussion comment, you can change the subject and/or text of your comment without deleting and retyping the comment.

To edit a discussion comment

1 With the document you are discussing open, in the Discussion pane, locate the comment you want to edit.

2 To the right of the discussion text, click .

The *Enter Discussion Text* dialog box opens.



3 Make any changes to your discussion subject or text, and click **OK**.

The *Enter Discussion Text* dialog box closes. The changes are made and the discussion comment is updated.

Replying to Existing Discussion Comments

If another user posts a discussion comment or question that you need to reply to, you can add a reply within the discussion thread to record and track progress made.

▸ To reply to a discussion comment

1 With the document you are discussing open, in the Discussion pane, locate the comment to which you want to reply.

2 To the right of the discussion text, click .

The *Enter Discussion Text* dialog box opens.

3 In the **Discussion Subject** field, type a brief subject for this comment.

This text appears in bold in the Discussion pane.

4 In the **Discussion Text** field, type the content of your comment.

5 Click **OK**.

The reply message subject, text, author name, and date and time appear indented under the original comment (or, if one or more replies have been posted, the last reply) in the Discussion pane.

Deleting Discussion Comments

When a discussion comment has been closed or you no longer need to track it, you can remove it from the discussion thread.

Deleting a comment does not remove all replies to that comment; each comment and reply must be deleted separately.

To delete a discussion comment

1 With the document you are discussing open, in the Discussion pane, locate the comment you want to delete.

2 To the right of the discussion text, click .

BTRS displays the message, “Are you sure you want to delete this entry?”

3 Click **OK**.

The comment is removed from the discussion thread. All subsequent entries move up in the Discussions pane.

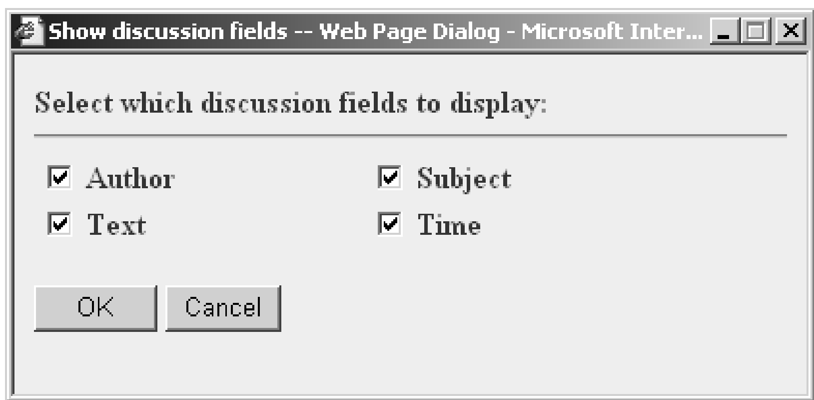
Customizing and Filtering Discussion Comments

For each document you discuss, you can customize how the discussion thread appears. You can choose to view the comment’s author, subject, text, and/or date and time. You can also filter discussion comments by author or when the comment was posted.

To customize the appearance of discussion comments

1 With the document you are discussing open, in the Discussion pane, click **View**.

The *Show discussion fields* dialog box opens.



2 Select one or more of the following check boxes: **Author**, **Subject**, **Text**, or **Time**.

Clearing the check box removes the item from the comment display.

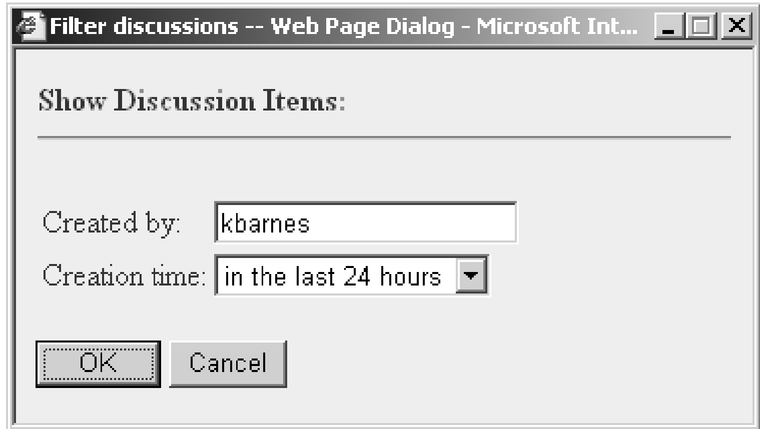
3 Click **OK**.

The *Show discussion fields* dialog box closes. The options you selected display in the discussion comments for the document.

To filter discussion comments

1 With the document you are discussing open, in the Discussion pane, click **Filter**.

The *Filter discussions* dialog box opens.



2 In the **Created by** field, type the name of the author as it appears in the discussion thread.

   You may skip this step if you want only to search by when the comment was posted.

3 In the **Creation time** list, select the range of dates you want to be displayed in the discussion thread.

   You may skip this step if you want only to search by who posted the comment.

4 Click **OK**.

   Matching discussion comments are displayed in the Discussion pane.

Subscribing to Documents

For more information about clearing subscription notifications or deleting subscriptions to documents, see “Working with Subscriptions” in Chapter 2, page 27.

If you need to track changes to a particular document, you can subscribe to that document and be notified when changes are made and the document is republished. To create a document subscription, follow the steps in “Creating Subscriptions” on page 28.

Subscription notifications appear on the BTRS portal home page. In addition, you can also request that notification be sent to your e-mail address; you have the option to receive e-mail notifications as changes occur, or to receive daily or weekly notifications.

Faxing Documents

BTRS enables you to send faxes directly from the portal to other BTRS users in your HAN. You can fax Microsoft Word (.doc) documents, Microsoft PowerPoint (.ppt) presentations, rich text (.rtf) files, standard text (.txt) files, and Portable Document Format (.pdf) files. After you send a fax, you can review the current status of the fax, and search for and view other documents you have faxed.

You can send faxes to any role or role group that you have permission to alert. For more information about alertable roles, see “Understanding Alertable Roles” on page 89.

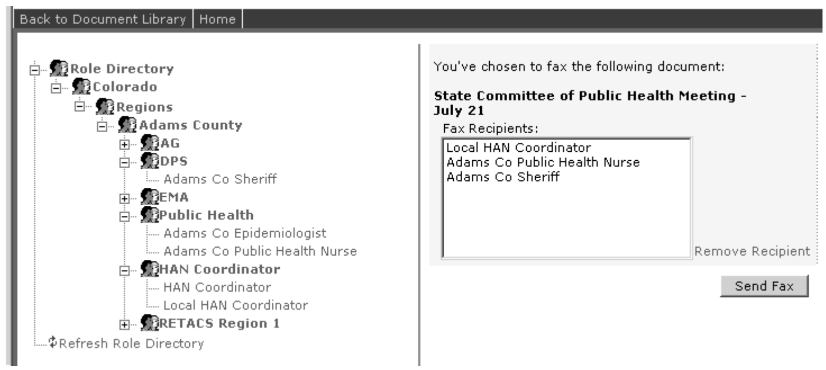
▸ To fax a document

1 In the Document Library, open the folder than contains the document you want to fax.

2 Under the name of the document, click **Fax**.

This option does not appear if the document cannot be faxed.

The *Fax Documents* page appears.



3 In the left pane, expand the tree to locate and select the roles to which you want to fax the document.

To select all the roles within a particular OU, right-click the name of the OU and click **Select All Roles in OU**. To select all of the roles that reside within a particular OU and all sub-OUs, right-click the name of the OU and click **Select All Roles in OU and Sub OUs**.

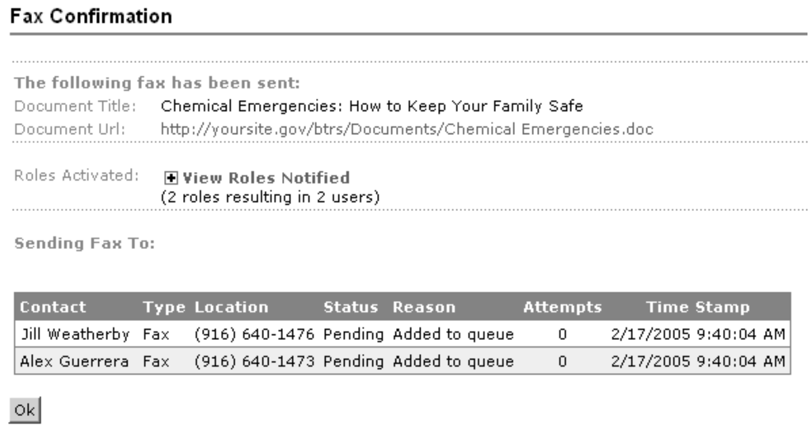
In the right pane, the role names appear in the **Fax Recipients** list as you select them.

4 Click **Send Fax**.

BTRS displays the message, “Are you sure you want to send this fax?”

5 Click **OK**.

The *Generating Fax* page displays while the fax is being sent. When the process is complete, the *Fax Confirmation* page appears, displaying the name of each user who is scheduled to receive the fax, and the current status of the fax.



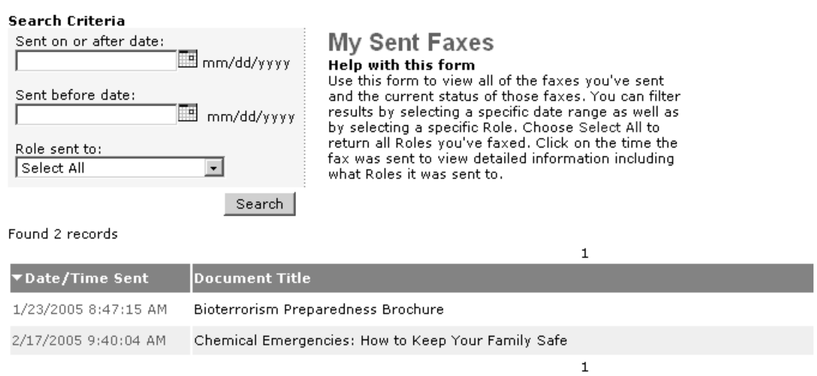
Viewing Sent Faxes

The *My Sent Faxes* page enables you to search for specific documents you have faxed either to a particular role, during a specified date range, or both.

To search for sent faxes

1 In the Document Library, in any folder, click **View My Sent Faxes**.

The *My Sent Faxes* page appears.



To view all the faxes you have sent, leave all fields blank, then click **Search**.

2 In the **Sent on or after date** field, type or select the date on or after which you sent the fax.

Click the calendar icon next to the field to view and select from dates on the calendar.

3 In the **Sent before date** field type or select the date on or before you sent the fax.

Click the calendar icon next to the field to view and select from dates on the calendar.

4 In the **Role sent to** list, select the role or role group to which you faxed the document.

Only those roles and role groups you have permission to alert appear in the list.

Choosing the **Select All** option display faxes sent to all roles and role groups you have permission to alert.

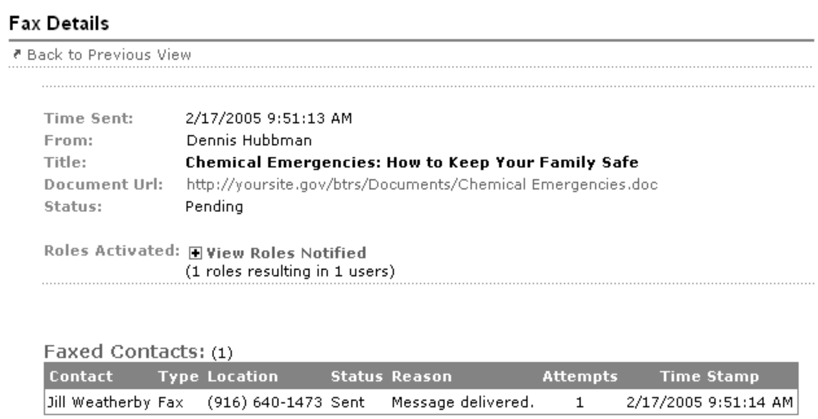
5 Click **Search**.

BTRS returns a list of faxes that meet your criteria.

To view sent fax information

1 After performing the previous steps in “To search for sent faxes,” on the *My Sent Faxes* page, click the date and time link of the fax for which you want to see more information.

The *Fax Details* page displays.



2 Perform one or more of the following functions:

Click this	To do this
Back to previous view	Return to the *My Sent Faxes* page
Refresh Fax Details	To re-load the *Fax Details* page with the latest data
Resend Fax	To resend a failed fax
Document Url link	View the document you faxed
View	View the list of all roles and/or roles groups who are scheduled to receive the faxed document

Deleting Documents

If you have permission to do so, you can delete documents you no longer need to post or share with other users on the portal. You must be assigned Author or Admin permissions for that folder to delete the file.

You can delete a document through its folder in the Document Library section, through the Categories section of the portal, or from the search results list on the *Search* page. Deleting the document from the Categories section or the *Search* page also removes it from its host folder in the Document Library. If you want to remove a category from the document profile without deleting the file completely, check out the document instead and assign new category information to the document. For more information, see “Checking In Documents” on page 58.

Take care in selecting documents to be deleted, as documents cannot be recovered. If you are unsure about deleting a particular document, check out and save a copy of the document on your computer first.

To delete a document

1 In the Document Library, Category section, or in the search results list, locate the document you want to delete.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

This option does not display if you do not have permission to delete the document.

3 Under Actions, click **Delete**.

BTRS displays the message, “Are you sure you want to delete this document?”

4 Click **OK**.

The document is removed from its host folder as well as any category folders.

5 Using the Alerting System

The alerting feature in BTRS provides a powerful and efficient method to inform one or more users, or roles and/or role groups, in your HAN of important events in your area. Alert messages can be sent to users' e-mail addresses, phones, fax numbers, and/or alpha pagers.

Receiving and confirming alerts is simple and takes only a few moments to do. You can choose how you are alerted so that you don't miss any critical information. In addition, you can quickly send notifications to one or more roles, role groups, or specific users throughout your HAN.

If a user has a BTRS Alerting license, he or she can receive, but not send or cancel, alerts. As such, when he or she logs in, BTRS will not display the Alerts section described in this chapter, although he or she can confirm and view alerts just as other users do.

Viewing Active Alerts

For more information about setting and modifying your alerting profile, see "Using Alerting Profiles" in Chapter 3, page 40.

When an alert is sent, you can be contacted in one of three methods:

- Through the devices you specify in your active alerting profile
- Through your work fax only
- Through your work e-mail only

In addition, the alert is always posted on the BTRS portal for the duration of the alert, even if you have already confirmed receipt of the alert.

When sending any alert, you can also view the status of communication with the alert recipients to determine who the alert was sent to, what devices the alert has been sent to, and if each user has confirmed receiving the alert. You can also resend any active alert to only those users who haven't confirmed the alert.

Viewing Active Alerts on the BTRS Home Page

The BTRS home page displays all active alerts sent to you by another user (or by you, if you send the alert to yourself). In addition, you can view the alert's priority, the name of the user who sent the alert, and the subject of the alert. All alerts remain on the BTRS home page for the duration of the alert (determined by the user sending the alert), even if you have already confirmed the alert through any device (phone, e-mail, portal, etc.).

Alert Time	Sent From	Subject	Priority
8/24/2004 1:43:23 PM	Chris Edwards	Investigation Results	Medium

Active alert on the BTRS home page

Viewing Active Alert Details

From the BTRS home page, you can view additional information about an alert by clicking the date and time link in the **Alert Time** column. Doing so displays the *Alert Details* page.

By default, alerts appear in the order sent to you. To sort the alerts in ascending order by sender or subject, click the column once. To sort the results in descending order, click the column again. An arrow appears next to the column's title to indicate the order in which the alerts are sorted.

The *Alert Details* page displays detailed information about the alert, including the date/time the alert was sent, the date/time the alert will expire, the name of the alert sender, the text of the alert message, the alert's status, and the roles, role groups, and/or selected users notified. You can also listen to recorded messages the sender included with the alert.

To view the details of an alert you received

1 On the BTRS home page, in the **Alert Time** column, click the link that contains the date and time for the alert you want to view.

The *Alert Details* page appears.

2 Perform one or more of the following functions:

Click this	To do this
Back to previous view	Return to *View My Sent Alerts* page
Confirm Receipt of Alert	If you haven't already done so, confirm that you have received the alert
email address link	Send an e-mail message to the alert sender (only if Enable Signature was selected for the alert)
recorded message link	If included, listen to an attached .wav file
View	Display the list of each role and/or role group you sent the alert to (only if alert was sent by role)

Viewing Alerts You Have Sent

At any time after you send an alert, you can review the details of the alert, including the list of users who received your alert, as well as the confirmation status and which devices were notified. You can search for alerts you have sent by user or role, using a specific date range or the name of the role you sent the alert to.

If necessary, you can resend the alert information to those users who have not yet confirmed. For more information about resending alerts, see “Resending Alerts” on page 100. You can also use the *My Sent Alerts* page to cancel an alert that is still in progress. For more information about canceling alerts, see “Canceling Alerts” on page 101.

To view sent alerts

1 On the BTRS navigation bar, click **Alerts**.

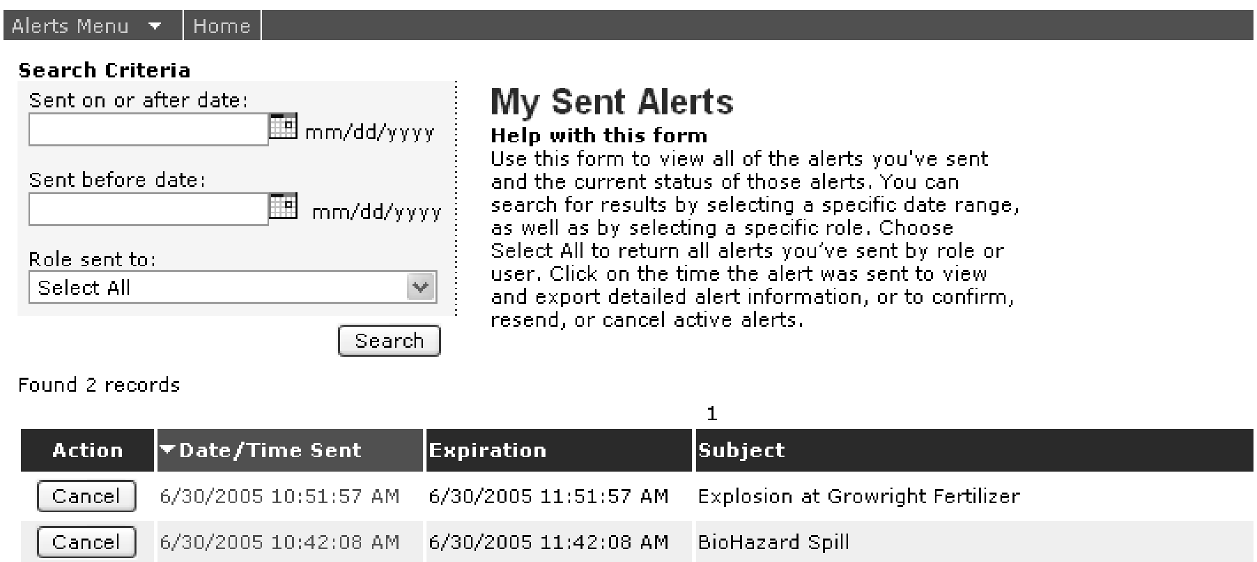
The *Alerts* page appears.

2 Under Alerts Menu, click **View My Sent Alerts**.

– or –

From the *Alert Confirmation* page, on the **Alerts** submenu, click **View My Sent Alerts**.

The *My Sent Alerts* page appears.



View Sent Alerts page

To view all the alerts you have sent, leave all fields blank, then click **Search**.

3 In the **Sent on or after date** field, type or select the date on or after which you sent the alert.

Click the calendar icon next to the field to view and select from dates on the calendar.

4 In the **Sent before date** field, type or select the date before which you sent the alert.

Click the calendar icon next to the field to view and select from dates on the calendar.

The date you enter in this field is not included in the search.

5 In the **Role sent to** list, select the role or role group to which you sent the alert.

Only those roles and role groups you have permission to alert appear in the list. Choosing the **Select All** option generates a list of alerts you have sent to users, or roles and/or role groups.

To sort the search results, click the column's title. To view alerts on subsequent pages, click the page number above or below the search results.

6 Click **Search**.

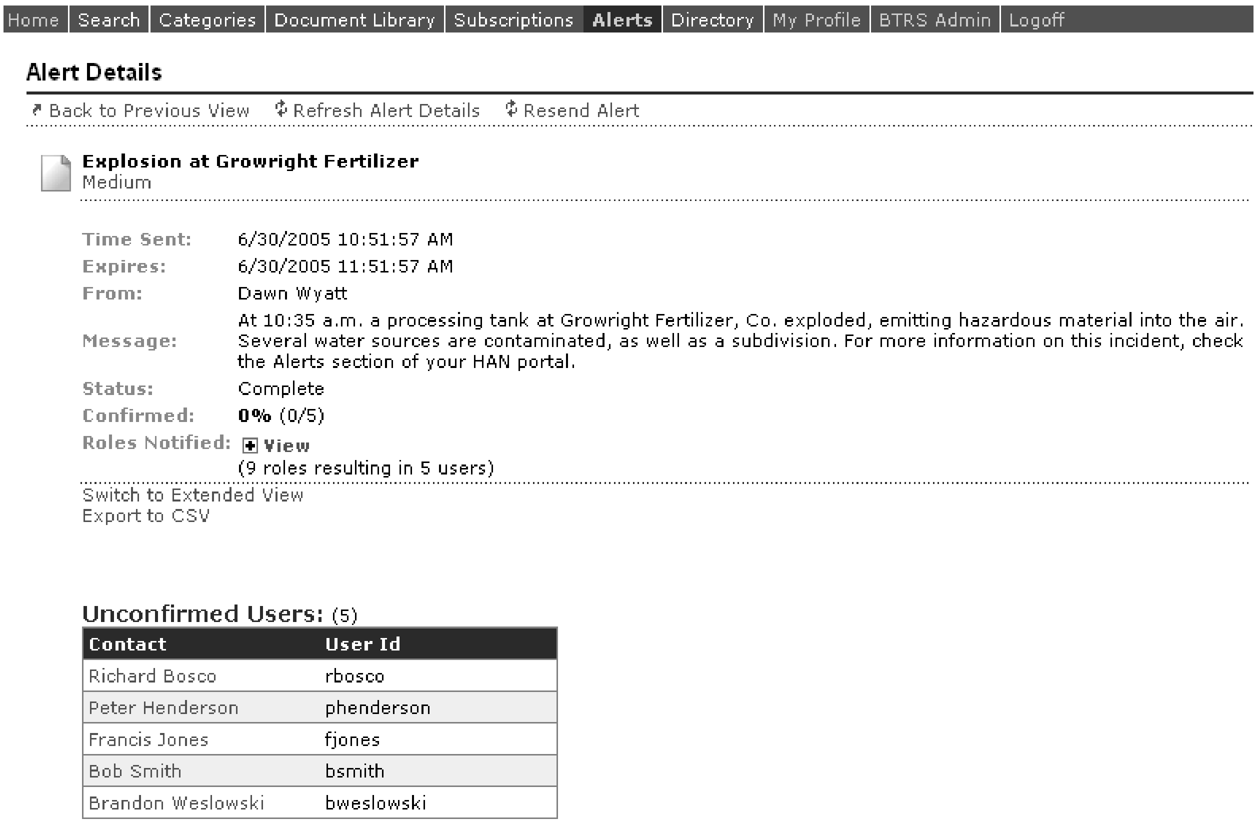
BTRS returns a list of alerts that meet your criteria.

If an alert recipient confirms an alert via email by clicking "Reply", there could be a delay between his/her actual confirmation and BTRS's receipt of the confirmation, depending on the speed of the user's email provider. Once BTRS recieves the alert confirmation email, it will update the confirmation information.

To view sent alert details

1 After performing the previous steps in "To view sent alerts" on page 81 click the date and time link of the alert for which you want to see more information.

The *Alert Details* page displays.



Alert Details page (viewed from BTRS Admin)

2 Perform one or more of the following functions:

Click this	To do this
Back to previous view	Return to *View My Sent Alerts* page
Refresh Alert Details	Display the current status of notifications being sent to users
Confirm Receipt of Alert	If you haven't already done so, confirm that you have received the alert
Resend Alert	Resend the alert information to users who have not confirmed
email address link	Send an e-mail message to the alert sender (only if Enable Signature was selected for the alert)
recorded message link	If included, listen to an attached .wav file

Click this	To do this
View	Display the list of each role and/or role group you sent the alert to (only if the alert was sent by role)
Switch to Extended View/Switch to Basic View	Display either the complete or simplified alert details for each alert recipient
Export to CSV	Export the alert recipient list to a CSV file

Understanding Alerting Statuses

After an alert is sent, you can check the current status of the alert to see whether the alert notifications are complete or not, or confirm if an alert recipient has received and/or confirmed notification through one or more devices.

Alert Statuses

You can check for the current status of an alert on the *Alert Details* page. Use the following table to identify the status of an alert:

This term	Indicates this status
Canceled	Alert has been canceled by the alert sender or BTRS Administrator
Complete	All phone calls have been sent and all emails have been delivered, or all users have confirmed receipt of the alert
In Progress	Phone calls and/or emails are currently being delivered ***Note:*** *If an alert recipient confirms an alert via email by clicking "Reply", there could be a delay between his/her actual confirmation and BTRS's receipt of the confirmation, depending on the speed of the user's email provider. In which case the In Progress status will still display instead of Complete. Once BTRS receives the alert confirmation email, it will update the status to Complete.*
Pending	Alert has not yet been delivered to Internet or phone service provider
Resent	Alert information has been resent to unconfirmed users only

Device Statuses

You can verify the status of a notification sent to any device (i.e., cell phone, e-mail, fax, etc.) for each alert recipient on the *Alert Details* page. You can find additional details about the status in the **Reason** column.

To view the notification details for each device contacted, click **Switch to Extended View** on the *Alert Details* page, or click the contact's name while in Basic View. Use the following table to identify the status of notifications for each device.

This term	Indicates this status
Attempted	BTRS contacted this device, but user did not confirm for some reason
Calling	Line is currently in use with this device (e.g., this device is being called)
Canceled	Attempt to this device was canceled because user confirmed through another device
Confirmed	User confirmed receipt of alert through this device
In Progress	Notification has been passed on to service provider for delivery
Not Sent	BTRS was unable to contact this device for some reason
Pending	Notifications are waiting in BTRS queue to be sent to service provider

Confirming Receipt of Alerts

For more information about creating and activating alerting profiles, "Using Alerting Profiles" in Chapter 3, page 40.

You can confirm alerts sent to you through one of several methods: e-mail, telephone, or the BTRS portal, depending on which devices you include in your active alerting profile. BTRS sends notifications to each device based on the order you select in your alerting profile.

In the case that a Work Fax or Work Email Only alert is sent, only your designated fax number or e-mail address will receive notification.

While BTRS will only send one notification to each e-mail account in your active alerting profile, BTRS will keep sending notifications to the phone numbers until you confirm an alert. The person sending the alert determines how many times BTRS will notify you during an alert. So, you may recieve several notifications at the same phone number. After you confirm that you have received the alert, using any method, any other scheduled notifications are discontinued.

If you confirm an alert via email by clicking “Reply”, there could be a delay between your actual confirmation and BTRS’s receipt of the confirmation, depending on the speed of the user’s email provider. Once BTRS recieves your alert confirmation email, it will stop sending you notifications.

If you are unable to confirm an alert through any device, your BTRS administrator can confirm the alert for you. Contact your BTRS administrator for more information.

The user who sends the alert can view the progress of the alert at any time on the *My Sent Alerts* or *Alert History Log* pages, including both the details of which devices your alert was sent to, as well as the time and method of your confirmation.

To verify that you have confirmed receipt of an alert, click the **Date/Time Sent** column either on the BTRS home page or on the *Alerts* page to display the *Alert Details* page. If the **Confirm Receipt of This Alert** link displays at the top of the page, you have not yet confirmed the alert.

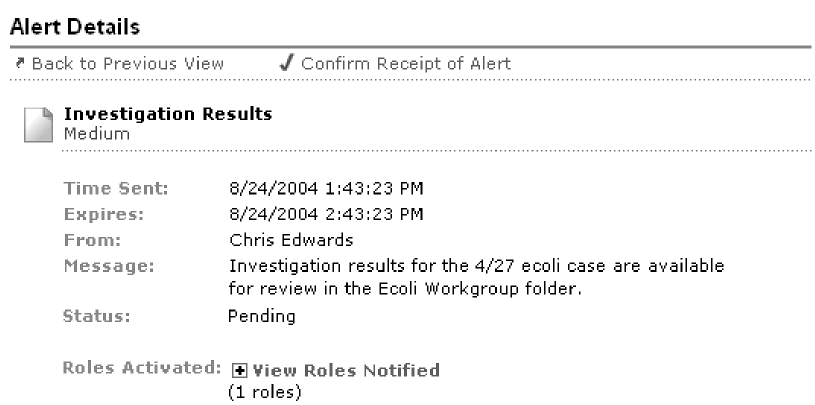
Confirming Alerts through the BTRS Portal

You can choose to confirm an alert through the BTRS portal in one of two ways – either on the BTRS home page, or from the *Alerts* page.

To confirm receipt of an alert on the BTRS home page

1 On the BTRS home page, click the **Date/Time** link for the alert you want to confirm.

The *Alert Details* page appears.



2 At the top of the page, click **Confirm Receipt of Alert**.

The alert is confirmed, and the Confirm Receipt of Alert link no longer appears on the page.

To confirm receipt of an alert on the Alert Details page

1 On the BTRS navigation bar, click **Alerts**.

The *Alerts* page appears.

2 Under Active Alerts, in the **Alert Time** column, click the date and time link of the alert you want to confirm.

The *Alert Details* page appears.

3 At the top of the page, click **Confirm Receipt of Alert**.

The alert is confirmed, and the Confirm Receipt of Alert link no longer appears on the page.

Confirming Alerts via Telephone

If you elect to have an alert sent to any standard telephone or cellular phone, you can confirm receipt of the alert from your phone without logging in to BTRS. Depending on settings determined by your BTRS administrator, you may receive up to 10 calls at each phone number for each alert, until you confirm the alert.

If a Work Fax or Work Email Only alert is sent to you, you will not receive telephone calls, even if you have entered phone numbers in your alerting profile.

To confirm an alert via the phone

1 Upon answering your phone, listen to the automated greeting.

2 Press any key on your phone to continue.

3 When prompted, enter the four-digit security code you created as your alerting security code.

For more information about setting and changing your alerting security code, see "Using Alerting Security Codes" in Chapter 3, page 38.

4 After successfully entering your code, listen to the alert message.

– or –

If you are unable to enter your code, or if you enter an incorrect code, the prompt repeats.

After three unsuccessful entries, BTRS disconnects.

5 When you have listened to the entire alert message, press **1** on your phone to confirm the alert, or **2** to repeat the message.

Confirming Alerts via E-mail

If you elect to have an alert sent to your e-mail address, you can confirm the alert via the e-mail message, using either of two methods:

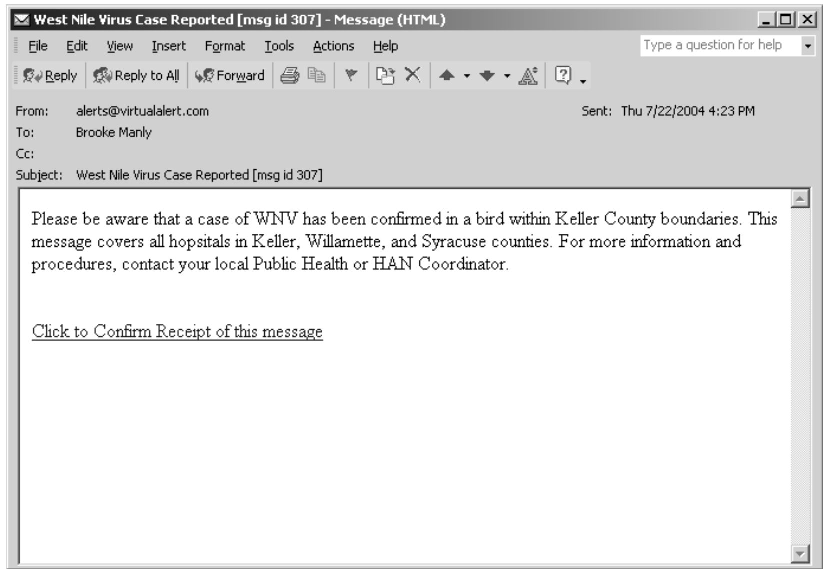
- Clicking the confirmation link in the email
- Replying to the email

If a Work Fax Only alert is sent to you, you will not receive an e-mail, even if you have entered e-mail addresses in your alerting profile.

To confirm an alert using the "Click to Confirm" link

1 Upon opening the e-mail message, review the alert message in the e-mail.

The e-mail displays the subject, including the message ID number, and message of the alert. To view the name of the alert sender, you need to review the information on the BTRS home page or on the *Alerts* page.



2 At the end of the alert message, click the **Click to Confirm Receipt of this message** link.

If you are not currently logged in to your BTRS portal, you are prompted to log in to BTRS.

After you successfully log on, BTRS displays the message, "Alert confirmed as received."

To confirm an alert by replying to the e-mail

1 Upon opening the e-mail message, review the alert message in the e-mail.

The e-mail displays the subject, including the message ID number, and message of the alert. To view the name of the alert sender, you need to review the information on the BTRS home page or on the *Alerts* page.

2 In the email interface, click **Reply**.

The email program generates a reply email.

3 If the subject for the reply email does not include the message **ID number** of the original alert email, type it in the **Subject** field.

You must type the message ID in the following format (brackets included): [id:####]

4 In the **Subject** field, after the message ID number, type **Confirm**.

Any emails that do not include a correct message ID number and the corectly spelled word “Confirm” will not register with BTRS as confirmations.

5 In the email interface, click **Send**.

Your email program sends the email. When BTRS recieves your reply, it marks the alert notification as confirmed and halts all other attempts to contact you.

If you confirm an alert via email by clicking “Reply”, there could be a delay between your actual confirmation and BTRS’s receipt of the confirmation, depending on the speed of the user’s email provider. Once BTRS recieves your alert confirmation email, it will stop sending you notifications.

Sending Alerts

Using BTRS, you can quickly inform other BTRS users of important occurrences in your HAN. You may choose to send alerts by selecting one or more alertable roles or role groups, by using a pre-defined alert template, or by searching for specific users who meet your criteria.

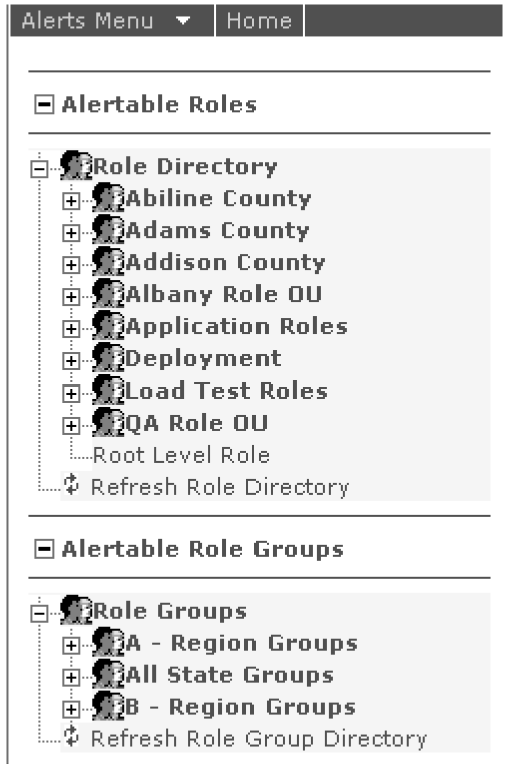
When you send alerts, each user is notified according to the type of alert you select, including by alerting profiles, by fax only, or by work e-mail only. If you choose to send an alert according to each user’s alerting profile, each user receives alerts on the devices he or she selects in his or her active alerting profile. If you select the Fax Only or Work Email Only options, the alert is sent only to the work fax or e-mail address in each user’s profile.

Only those users with BTRS Admin and BTRS Collaborator licenses can send alerts.

Understanding Alertable Roles

The roles and role groups you can alert are determined by your BTRS Administrator, based on the roles you belong to. If you have permission to send an alert to a particular role or role group, that role or role group name appears in the directory tree on the *Send Alert by Role* page; otherwise, the role/role group does not appear in the tree. In addition, when you send an alert by user, only users who are assigned to roles or roles groups that you can alert appear in search results on the *Send Alert by User* page.

If you do not see a role or role group in the directory tree that you need to alert, contact your BTRS administrator.



Directory tree displaying alertable roles (Send Alert by Role page)

To verify which users are assigned to a particular role, right-click the name of the role and click **View Role Members**. To verify which roles are assigned to a particular role group, right-click the name of the role group and click **View Role Group Properties**.

Sending Alerts by Role

When you send an alert by role, BTRS enables you to choose which roles and/or role groups to notify. The roles and role groups that you can send alerts to are called “alertable roles” and appear in the directory tree. For more information about alertable roles, see “Understanding Alertable Roles” on page 89.

You can also choose which alerting method will be used, how long to keep the alert active and what the alert’s priority be should be, as well as what message and subject to send to the recipients. If you wish, you may also include a pre-recorded message that will be played for all phone calls, and a custom signature in the message body.

In previous versions of BTRS, the *Send Alert by Role* process was called “Send New Alert.”

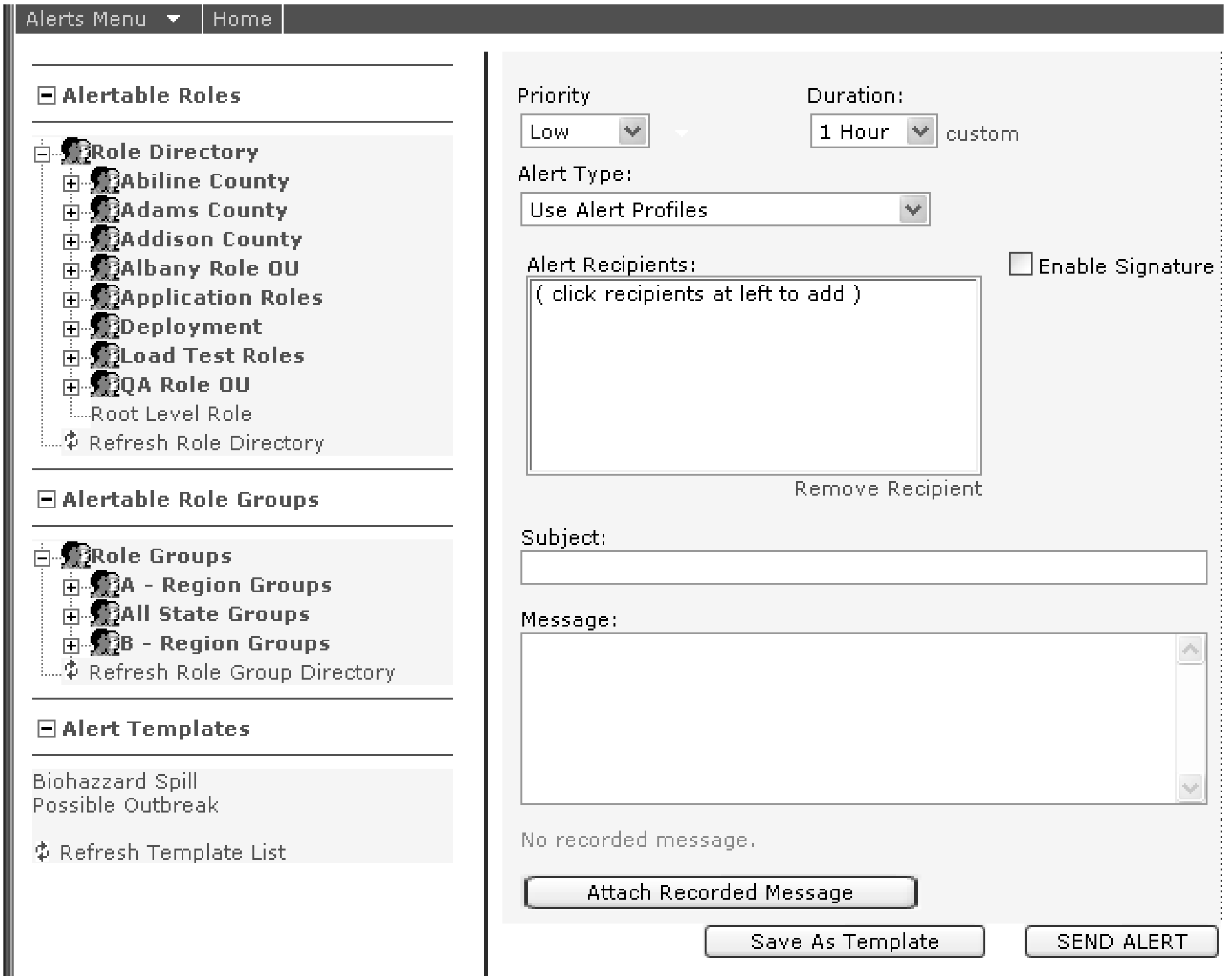
To send an alert by role

1 On the BTRS navigation bar, click **Alerts**.

The *Alerts* page appears.

2 Under Alerts Menu, click **Send Alert by Role**.

The *Send Alert by Role* page appears.



Send Alert by Role page

If your organization has additional “plug-in” applications for sending alerts, you may see a third button at the bottom of the page (in addition to **Save As Template** and **SEND ALERT**) to initiate the alert plug-in. For more information on using the plug-in application, contact your HAN Coordinator.

You may select as many roles and or role groups as you wish. In the right pane, roles and role groups you select appear in the **Alert Recipients** list.

3 In the left pane, in the tree, do one or more of the following:

To do this	Do this
Select individual roles and/or role groups	Click each role and/or role group to which you want to send the alert
Select all roles within an OU	Right-click the OU that contains the roles you want to include in the alert, and click **Select All Roles in OU**
Select all roles within an OU and all sub-OUs	Right-click the OU that contains the sub-OUs and roles you want to include in the alert, and click **Select All Roles in OU and Sub OUs**

To send an alert using a template instead, select a template name from the tree. For more information using templates, see “Sending Alerts Using Templates” on page 94.

Only the roles and role groups you have permission to alert appear in the tree.

To verify which users are assigned to a particular role, right-click the name of the role and click **View Role**. To verify which roles are assigned to a particular role group, right-click the name of the role group and click **View Role Group**.

4 In the right pane, in the **Priority** list, select **Low**, **Medium**, or **High**.

5 In the **Duration** list, select **1 Hour**, **1 Day**, or **1 Week**.

– or –

To select a different range of time, click **custom**, and select the number of days and/or hours you want the alert to remain active.

Regardless of the method you choose, the alert appears on the BTRS home page of each user who received the alert.

6 In the **Alert Type** list, select one of the following methods:

Select this	To do this
Use Alert Profiles	Send an alert to each user based on his or her active alerting profile
Fax Only Alert	Send an alert to each user’s designated work fax number
Work Email Only Alert	Send an alert to each user’s work e-mail address

7 In the **Subject** field, type the subject or title of your alert.

Do not include any form of the word “confirm” in your subject. Doing so will interfere with the email confirmation functionality of BTRS. (For more information, see “To confirm an alert by replying to the e-mail” on page 88.)

8 In the **Message** field, type the alert message.

You can enter up to 2,000 characters.

9 To include a pre-recorded message for phone-based notifications, click **Attach Recorded Message**

The *Attach Recorded Message* dialog box opens.

Attach Recorded Message dialog box

10 Click Browse to locate the file you want to upload.

Recorded messages must be .wav files in PCM format. The default sound recorder settings for Windows will work. For help with this feature, contact your System Administrator.

Recorded messages replace the **Subject**, **Message**, and **Signature** you enter for all phone alerts. The subject, message, and signature are still included in e-mail, fax, and portal notifications.

11 When you are finished, click **Upload** to attach the .wav file.

The *Attach Recorded Message* dialog box closes.

12 To include a custom signature with this alert, select the **Enable Signature** check box.

13 Click **SEND ALERT**.

BTRS displays the message, “Are you sure you want to send this alert?”

14 Click **OK**.

The *Generating Alert* page displays while the alert information is being produced.

When the process is complete, the *Alert Confirmation* page appears, and displays the information for each user the alert was sent to. The users appear in the list alphabetically by last name.

Do not click the Refresh button in your browser when you are on the *Alert Confirmation* page. That will resend the alert. On this page, you should only click the OK button at the bottom of the page. If you want to view a refreshable page to check statuses, go to *View My Sent Alerts* and view the **Alert Details** for the alert. That page has a **Refresh Alert Details** link on the page that you can click to re-load the information on the page.

Sending Alerts Using Templates

For more information about creating templates and assigning template operators, see the *BTRS Administrator Guide*.

In addition to selecting roles and/or role groups to create an alert on the *Send Alert by Role* page, you may also choose to send an alert using any pre-defined template you have been given permission to use. You can view and use any template for which your role has been added as an operator.

Each alert template is set up by a BTRS Administrator to automatically include the roles and/or role groups that will receive the alert; the alert subject and message (and recorded message if attached); the type of alert; and the alert's duration and priority.

When you select a template, all information entered by the user who created the alert template is automatically added to the alert. If you choose, you can add your own custom signature to the alert.

To send an alert using a template

1 On the BTRS navigation bar, click **Alerts**.

The *Alerts* page appears.

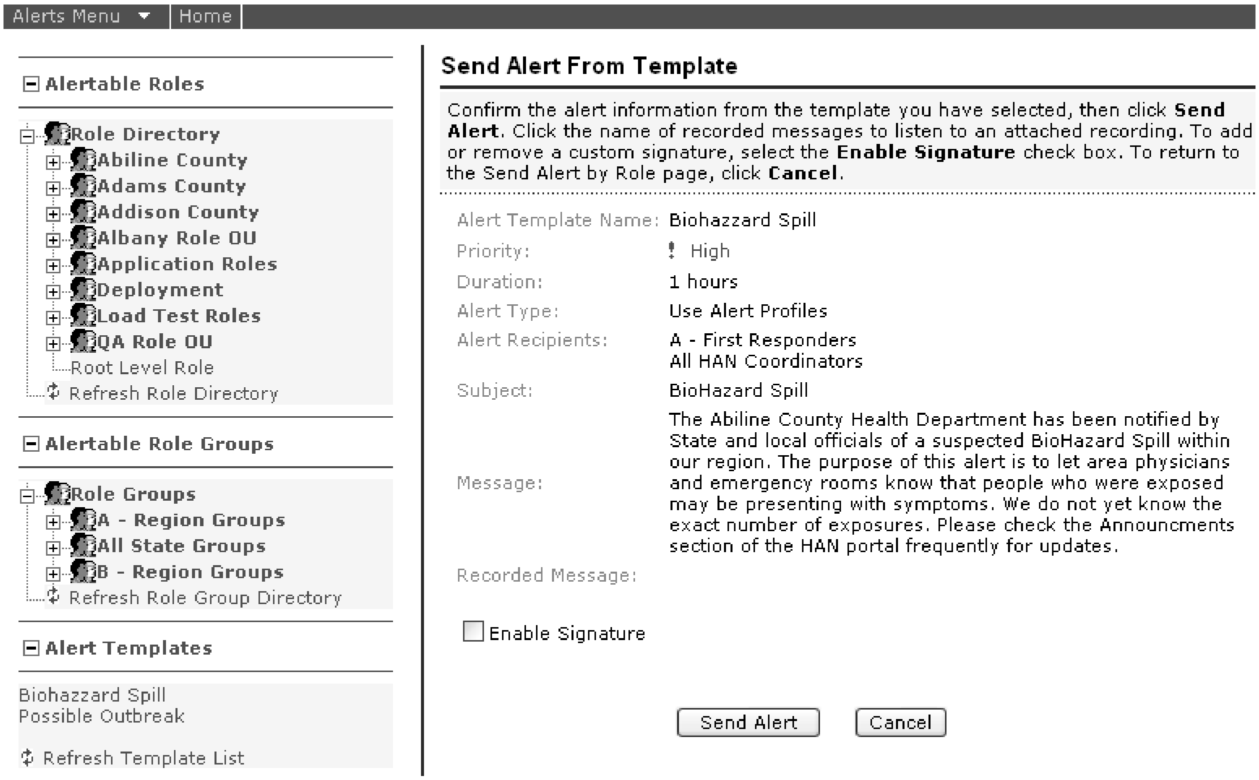
2 Under Alerts Menu, click **Send Alert by Role**.

The *Send Alert by Role* page appears.

3 In the left pane, expand the **Templates** section.

4 Click the name of the template that you want to use.

The *Send Alert From Template* page displays.



Send Alert From Template page

5 Review the template's alert information, then perform the following as necessary:

To do this	Do this
Listen to an attached recorded message	Click the name of the attached .wav file
Add a custom signature	Select the **Enable Signature** check box

6 When you are finished, click **Send Alert**.

BTRS displays the message, "Are you sure you want to send this alert?"

– or –

To choose another template or send a different alert, click **Cancel**.

7 Click **OK**.

The *Generating Alert* page displays while the alert information is being produced.

When the process is complete, the *Alert Confirmation* page appears, and displays the information for each user the was sent to. The users appear in the list alphabetically by last name.

Sending Alerts by User

On the *Send Alert by User* page, you can search for and send alerts to specific users who match your search criteria. You can search for any information users have entered on the *My Profile* page, such as the city the user works in, languages the user speaks, and the area code of the user's phone number.

Only those users who belong to roles and role groups you can alert appear in your search results, regardless of the search criteria you enter. You can view the roles and role groups you can send alerts to (and which users belong to those roles) on the *Send Alert by Role* page. For more information, see "Understanding Alertable Roles" on page 89.

The *Send Alert by User* process consists of two processes: the first covers entering criteria to search for users to alert and selecting users to send the alert to, and the second includes creating the alert body and selecting alerting preferences.

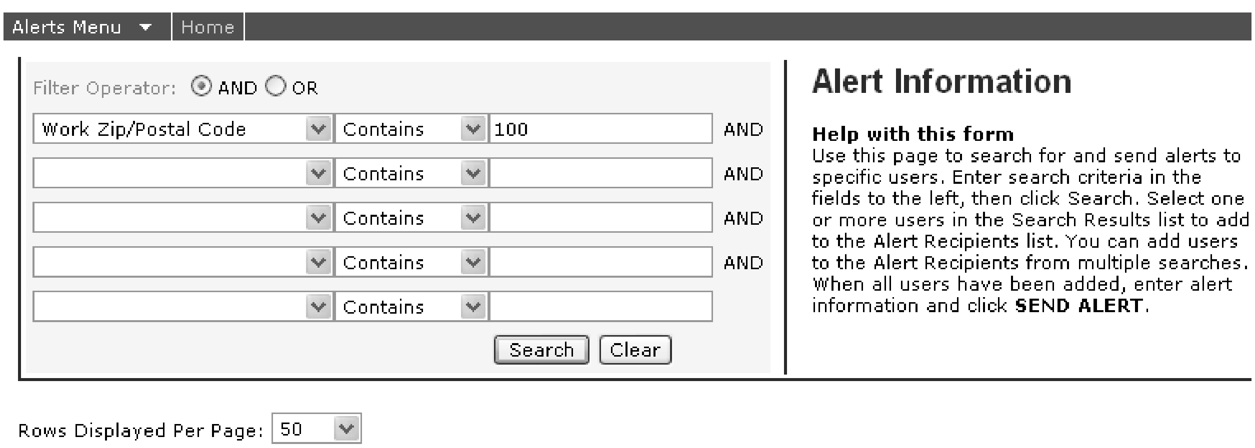
▸ To search for alert recipients

1. On the BTRS navigation bar, click **Alerts**.

   The *Alerts* page appears.

2. Under Alerts Menu, click **Send Alert by User**.

   The *Send Alert by User* page appears.



Send Alert by User page

3. In the first drop-down list, select the user profile item you want to search for, such as **Last Name**, **City**, or **Cell Phone**.

   You must choose at least one item to search for.

4 In the second drop-down list, select the term that best suits your search type:

Select this term	To search for items in the first column that
Contains	Include anywhere the text you type in the next step For example, to search for the city “Richmond”, type “`ri`” or “`mond`” in the third field
Equals	Match exactly the text you type in the next step For example, to search for the city “Richmond”, type “`Richmond`”
Starts with	Begin with the text you type in the next step For example, to search for the city “Richmond”, type ‘`r`”, “`ri`”, or “`rich`” in the third field
Ends with	End with the text you type in the next step For example, to search for the city “Richmond”, type “`mond`” or “`d`” in the third field

5 In the third field, type the text you want to search for, based on the information you entered in the first and second lists.

6 Repeat step 3 – step 5 for each criterium you want to include in the query.

7 Next to Filter Operator at the top of the page, select **AND** if you want BTRS to search for users who meet all the criteria you specify.

– or –

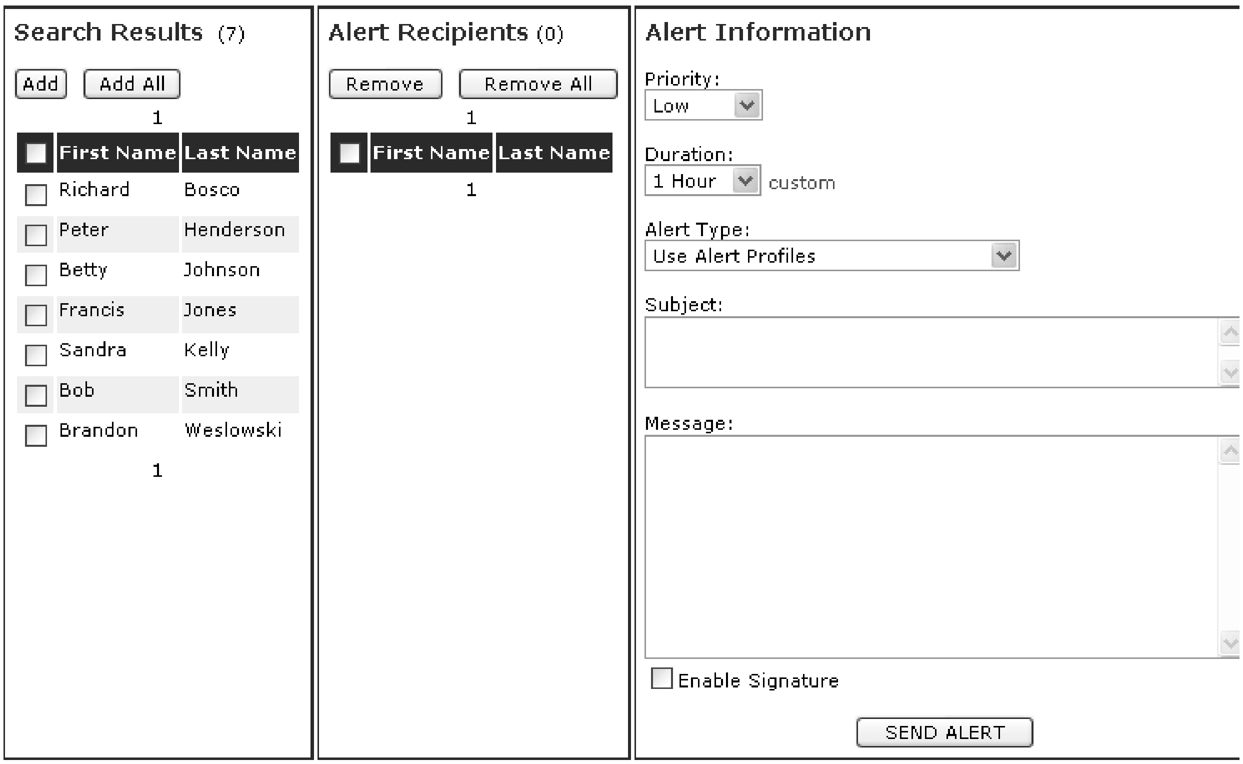
Select **OR** if you want BTRS to search for users who meet any of the criteria you specify.

8 In the **Rows Displayed Per Page** list, select the number of users you want to display in each page of the Search Results section.

9 Click **Search**.

The *Retrieving Available Users* page displays while BTRS searches for users who match your criteria.

When the process is complete, the *Send Alert by User* page displays the Search Results, Alert Recipients, and Alert Information sections.



Send Alert by User page

10 In the Search Results section, select one or more users to receive this alert, then click **Add**.

– or –

To include all users in the Search Results section as alert recipients, click **Add All**.

To select all users displayed on that page only, select the check box in the column heading.

All the users you selected are added to the Alert Recipients section in alphabetical order.

The order in which users appear in the Alert Recipients section is the order in which BTRS will send the alert. If you want users to recieve the alert in a particular order, select them one at a time.

11 Repeat step 3 – step 10 to search for and add additional users as alert recipients.

12 Continue to the next section to compose the alert message and select alerting preferences.

To send an alert to specific users

1 After completing the steps in “To search for alert recipients” on page 96, under Alert Information in the **Priority** list, select **Low**, **Medium**, or **High**.

2 In the **Duration** list, select **1 Hour**, **1 Day**, or **1 Week**.

– or –

To select a different range of time, click **custom**, and select the number of days and/or hours you want the alert to remain active.

Regardless of the method you choose, the alert appears on the BTRS home page of each user who received the alert.

3 In the **Alert Type** list, select one of the following methods:

Select this	To do this
Use Alert Profiles	Send an alert to each user based on his or her active alerting profile
Fax Only Alert	Send an alert to each user’s designated work fax number
Work Email Only Alert	Send an alert to each user’s work e-mail address

4 In the **Subject** field, type the subject or title of your alert.

Do not include any form of the word “confirm” in your subject. Doing so will interfere with the email confirmation functionality of BTRS. (For more information, see “To confirm an alert by replying to the e-mail” on page 88.)

5 In the **Message** field, type the alert message.

You can enter up to 2,000 characters.

6 To include a custom signature with this alert, select the **Enable Signature** check box.

7 Click **SEND ALERT**.

BTRS displays the message, “Are you sure you want to send this alert?”

8 Click **OK**.

The *Generating Alert* page displays while the alert information is being produced.

When the process is complete, the *Alert Confirmation* page appears, and displays the information for each user the was sent to. The users appear in the list alphabetically by last name.

Generating Alerts via Phone

BTRS users who have been given permission to generate alerts from a telephone can call a designated phone number to launch an alert template without needing to log in to the portal. By providing a Call-in PIN Code and the Template ID number for the phone alert template you wish to use, BTRS automatically generates alert notifications based on the information provided in the template.

Before you can generate a phone-based alert, BTRS must have at least one alert template that includes the Phone In Role as an operator. For more information about creating and managing alert templates, see the *Administrator Guide*.

To generate an alert over the phone

1. Use the telephone number provided by your BTRS Administrator to call and begin the alerting process.
2. When prompted, enter the ten-digit **Call-in PIN Code** provided by your BTRS Administrator, then press **#** (pound key) on your telephone.
3. When prompted, enter the **template ID** for this alert provided by your BTRS Administrator.

   BTRS confirms the name of template based on the template ID you enter.
4. Press **1** to send the alert using this template.

   BTRS plays the message, “Your alert has been sent.”

   – or –

   Press **2** to select another template, then repeat steps 3 and 4 to send the alert.

Resending Alerts

After you send an alert and once the original alert is complete, you can resend the alert information to the users who have not confirmed receipt. The same information is sent in a new alert using the same alerting methods and preferences you chose for the original alert. The resend option is available for all alerts you send, until the alert is canceled, or all users confirm receipt of the alert.

When you resend an alert, BTRS appends the Subject of the alert with — “Resent, [subject]”; and the Message with — “This is a resend of an alert first sent at [date/time]. [message].”

You may only resend alerts that you originally send. Other users, including BTRS administrators, cannot resend alerts for you.

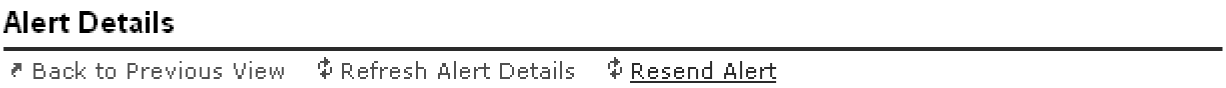
To resend an alert

1 Follow the steps in “To view sent alerts” on page 79.

The *My Sent Alerts* page displays the results of your search.

2 To view the details of a particular alert, click the date and time link of the alert for which you want to see more information.

The *Alert Details* page displays.



Links at top of Alert Details page

3 At the top of the page, click **Resend Alert**.

This link does not appear while the alert is in progress, if the alert is canceled, or if all users have confirmed receipt of the alert.

Canceling Alerts

You can cancel an active, in progress alert through the *My Sent Alerts* page. Although all e-mail alerts are sent immediately and cannot be undone, you may prevent some phone alerts from being issued.

If you have administrative privileges and are able to manage the alert sender’s role, you can cancel an alert sent by another user from the *Alert History Log* page. For more information, see the *BTRS Administrator Guide*.

To cancel an alert

1 Follow the steps in “To view sent alerts” on page 79.

The *My Sent Alerts* page displays the results of your search.

Action	Date/Time Sent	Expiration	Subject	Priority
Cancel	6/30/2005 10:51:57 AM	6/30/2005 11:51:57 AM	Explosion at Growright Fertilizer	Medium
Cancel	6/30/2005 10:42:08 AM	6/30/2005 11:42:08 AM	BioHazard Spill	! High

My Sent Alerts page search results

The cancel button will no longer appear if the alert has expired or has already been canceled.

2 In the **Action** column for the alert you want to cancel, click **Cancel**.

BTRS displays the message, “Are you sure you want to cancel this alert? All outgoing phone calls will be stopped. Some phone calls and all e-mail messages have already been delivered and cannot be repealed.”

3 Click **OK**.

BTRS displays the message, “Alert successfully canceled!” as well as the subject of your alert and your name as the sender.

4 Click **OK** to return to the *My Sent Alerts* page, which displays the updated list of alerts.

Cancel	6/30/2005 11:01:54 AM	6/30/2005 12:01:54 PM	Influenza Outbreak in Abiline County
N/A	6/30/2005 10:51:57 AM	6/30/2005 11:51:57 AM	(Canceled by: Dawn Wyatt) Explosion at Growright Fertilizer
Cancel	6/30/2005 10:42:08 AM	6/30/2005 11:42:08 AM	BioHazard Spill

Updated My Sent Alerts page

6 Using My Directory

The Directory section of the BTRS portal enables you to view, search for, and export other BTRS users' contact information. Because each BTRS user must update the information in his or her profile at least every 30 days, you can rely on the fact that the contact data in the directory is up-to-date. You can use this information to e-mail or fax items that BTRS does not, or to update your organization's contact database in other applications, such as Microsoft® Excel and Outlook®.

Depending on which data other users enter about themselves, you may be able to view the following information about each user:

- Name
- Title
- Organization name
- Type of industry user works in
- What languages the user speaks
- Roles the user is assigned to
- Contact information:
  - e-mail address
  - Work phone number
  - Cell phone number
  - Pager number
  - Fax number
  - Alternate phone number
  - Satellite phone number
  - Alpha pager number
  - Alternate e-mail address

If the user you are viewing has not been assigned to a role that you are able to alert, you will only see that user's e-mail address, work phone number, and work fax number. All other information in that user's profile appears as **(private)**.

In addition to locating user information using the directory tree view, you can also search for individual users' contact information, and copy directory information into other applications.

Using the Directory Tree View

For more information about what roles and OUs are, see "Roles, Role Groups, and Organizational Units" in Chapter 2, page 12.

The directory tree organizes user information by each role and Organizational Unit (OU) created in your BTRS portal. The name of each OU appears in bold, with an icon ( ) to the left. All roles appear in the tree as links; clicking the link displays each user in that role and the associated contact information.

To view users in the Directory Tree

1 On the BTRS navigation bar, click **Directory**.

The *My Directory* page appears.

2 In the left pane, on the **Directory Tree** tab, expand the tree to locate the role for which you want to view user information.

You can also search for users. For more information, see "Searching for Users in the Directory" on page 104.

3 Click the link for any role to display contact information in the right pane.

Searching for Users in the Directory

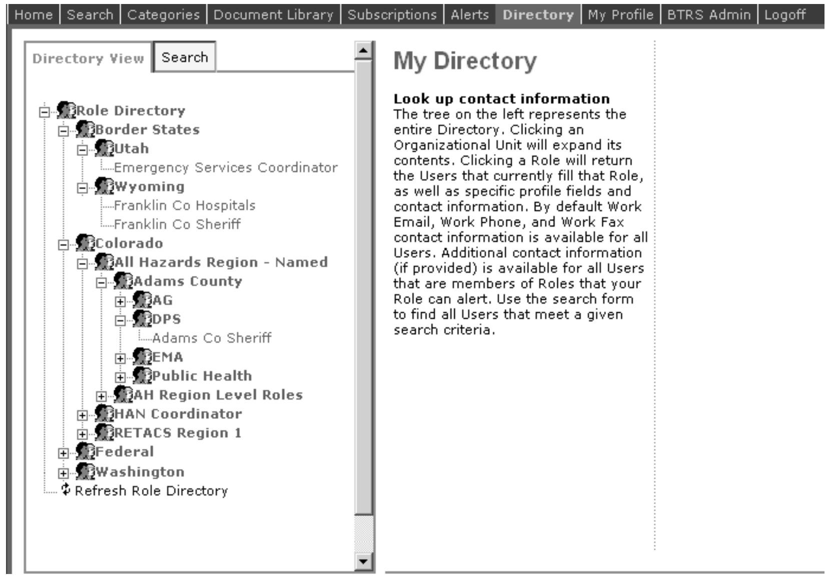
In addition to viewing users in the directory tree by role, you can search for individual users using other criteria, including the user's name, the company he or she works for, or the city in which he or she works. For example, you can perform a search to look for all users who work in Los Angeles, or whose title is HAN Coordinator.

Search results only display information entered by other users that you have permission to view.

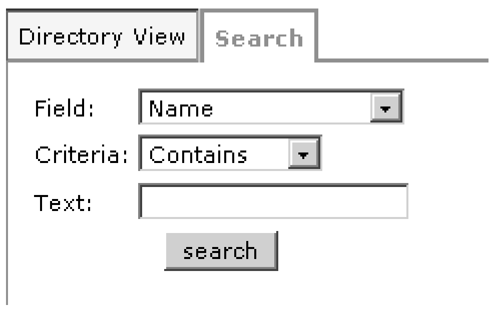
To search for users in the directory

1 On the BTRS navigation bar, click **Directory**.

The *My Directory* page appears.



2 In the left pane, click the **Search** tab.



3 In the **Field** list, select one of the following:

Select this option	To search by
Name	The user's name
Title	The user's job title
Organization	The name of the organization the user works for
Business Category	The category of business the user selected in his or her profile
Prof. License	A professional license the user holds
Specialty	The specialty the user selected in his or her profile
Spoken Languages	A language the user speaks

Select this option	To search by
Work Location	The user's job location
Work City	The city in which the user works

4 Based on the selection you made in step 3, in the **Criteria** list, select one of the following:

Select this option	To search for
Contains	Words that contain the letter, word, or phrase you enter in the **Text** field
Equals	Words that appear exactly as you enter in the **Text** field
Begins with	Words that begin with the letter or letters you enter in the **Text** field
Ends with	Words that end with the letter or letters you enter in the **Text** field

5 Based on the selection you made in step 3, in the **Text** field, type the letter, letters, word, or phrase you want BTRS to search for in the directory.

To view more of the right pane, place your cursor on the scroll bar between the left and right panes, then click and drag the scroll bar to the left.

6 Click **search**.

The results of your search display in the right pane.

Exporting Directory Information

After performing a search or locating users within a role, you can quickly create a Microsoft® Excel spreadsheet or a table in Microsoft® Word that contains all user information displayed on the page.

To copy user information to a spreadsheet

1 On the *Directory* page, select all the text you want to insert into the spreadsheet (or you can quickly select all text on the page by pressing **CTRL + A**).

2 Right-click the selected text, and click **Copy** (or press **CTRL + C**).

3 Open a new or existing document in Microsoft® Excel or Word.

4 Place your cursor at the location in the spreadsheet or document where you want to insert user information.

5 On the **Edit** menu, click **Paste** (or press **CTRL + V**).

The text from the *Directory* page appears in the document or spreadsheet.

Glossary

A

active alerts Alerts that have been sent and have not yet expired.

alert A notification sent to inform or warn roles or users within the BTRS directory.

alert details All details of a sent alert, including the alert's sender, subject, message, priority, send time, expiration, and roles or users notified.

alertable roles Roles designated by a BTRS Administrator to receive alerts from a particular role or role group.

application One or more programs in applications software that you can run on your computer. Some examples of applications are database programs (Microsoft® Access), word processors (Microsoft® Word), and spreadsheets (Microsoft® Excel).

approve The process of accepting a draft version of a document as ready for publishing in the Document Library. Only those users designated to be approvers for a specific folder can approve documents. See also **reject**.

Author A user who has permission to add, edit, delete, or read all documents in a folder. Authors can also create, rename, and delete folders, but cannot set folder security policies. In an enhanced folder, authors can also submit any document for publishing.

B

Back button In Microsoft® Internet Explorer, a button on the Standard Buttons toolbar that enables you to return to the page you were previously viewing. Not all pages enable you to use the Back button.

browser A software application used to locate and display Web pages. To use BTRS, you need to use Microsoft® Internet Explorer's browser. Most browsers can display both text and graphics, as well as sound and video.

BTRS Admin A BTRS user with broader permissions to manage portal content and settings, as well as roles, role groups, and users. In addition, BTRS Admins can generate and view various administrative reports and logs.

C

categories Groups of related content, organized hierarchically by subject matter.

category folder A folder that is used by coordinators to organize categories.

check in Add or return a document to an enhanced folder. Releases the editing reservation on a document, allowing others to open and edit it. See also **check out**, **enhanced folder**.

check out Create a writable version of a document while preventing other users from editing the same document. See also **check in**, **enhanced folder**.

D

dashboard See **digital dashboard**.

dashboard site A Web site created by using Digital Dashboard technology. The dashboard site contains a number of pages, or dashboards, and includes customization pages and custom Web Part forms. The dashboard site is used to distribute information to workspace users through a Web browser. BTRS is a dashboard site. See also **digital dashboard**, **Web Part**.

digital dashboard A page on a dashboard site. Each dashboard contains a collection of Web Parts in a modular view that can be presented to users in a Web browser. See also **dashboard site**, **Web part**.

directory The collection of Organizational Units (OUs) and the roles, users, or role groups within those OUs.

discussions A feature for adding threaded comments about a document.

document A discrete unit of content and its associated metadata.

Document Library The storage location for documents in the workspace. See also: **folder**.

document profile A set of properties applied to similar documents.

E

enhanced folder A document storage folder that supports document management tasks such as check-in, check-out, versioning, approval, and publishing. See also **folder**, **standard folder**.

extract A generated list of users that meet search criteria; also to create a data report in another format.

F

folder A means of organizing and storing programs, files, and documents on a disk or server. See also **enhanced folder**, **standard folder**.

form see **page**.

H

home page The page in BTRS to which users are taken upon login. The page enables users to access news, announcements, and alerts, as well as other areas of the BTRS portal.

K

keywords One or more words associated with a document, folder, or category that a user can use to search for that document, folder, or category.

M

maximize When using a window, to enlarge the size of the window (usually so that it covers the entire page). See also **minimize**.

minimize When using a window, to reduce the size of and replace the window with an icon on your task bar. Minimizing retains the information displayed in the window while allowing you to view other windows. Clicking the icon on the task bar restores the window to its previous size and position. See also **maximize**.

My Profile Information about individual users that can be updated by those users.

N

navigation bar A series of links on each page in BTRS that enable you to view another section of BTRS, such as My Profile, Directory, and Alerts.

O

Organizational Unit (OU) A container that holds objects (such as roles, users, or role groups), similar to a folder. Typically, an organization will create OUs that resemble their organizational structure, maintaining an OU for each department.

P

page A document on the World Wide Web that displays all the content assigned to that page, such as the BTRS home page or Alerts page. In BTRS, a Web page that serves to perform a particular function, such as sending an alert, entering document profiles, or generating a report.

permission(s) Authorizations within the portal, which determine access to documents/sections in the workspace. For example, the three standard permissions are: Reader, Author, and BTRS Admin.

profile (portal) Information about individual documents that are uploaded into BTRS. The profile information is attached to the corresponding documents and aids in searches. See also **My Profile**.

publish To make a document available to Readers. See also **approve**.

R

Reader A user who can search for and read documents but cannot add them to the workspace. By default, all folder users have Reader permissions. In an enhanced folder, Readers can only view folders and published versions of documents. A Reader cannot check out, edit, or delete workspace documents, nor view draft document versions.

reject The process of not accepting a draft version of a document as ready for publishing in the Document Library. Only those users designated to be approvers for a specific folder can reject documents. See also **approve**.

role A position within an Organizational Unit (OU) that consists of ne or more users.

role group One or more roles grouped together for the purposes of assigning alertable roles, folder permissions, or management rights. See also **alertable roles**, **roles**.

S

search The functionality of finding information in documents based on keywords found in the text of those documents or related to the properties of the documents. This is commonly referred to as full-text search. See also **index**.

standard folder Supports document profiles, but does not support check in, check out, publishing, or document version history.

subscription A request for notification when changes are made to a document; the contents of a folder or a category; or a search results list.

T

tree A method of organizing Organizational Units (OUs), roles, role groups, and/or users in which the groups appear similar to that of the branches of a tree. Clicking the items in the tree expands or collapses the information stored with that branch.

U

undo check out Cancel the check-out of a document. Undoing a document check out makes the last version of the document available for all users to check out.

V

version history The (reverse) chronological listing of revisions that have been made to an item, and any associated comments attached to the version by the user performing the check-in or check-out.

version label A number or other text that indicates the version of an item.

W

Web browser See **browser**.

Web page See **page**.

Web part A customizable, reusable component used to display specific information on a dashboard. Web parts are used to associate Web-based content (such as XML, HTML, and scripting) with a specific set of properties in an organizational framework. See also **dashboard site**, **digital dashboard**.

window An enclosed, rectangular area that displays on your monitor page that runs a program or displays data. You can have several windows open at one time; most allow to you to resize, move, maximize, and minimize the window. See also minimize, maximize and application.

workspace An organized collection of documents, content sources, management folders, categories, document profiles, subscriptions, and discussions. It provides a central location to organize, manage, and publish content.

Index

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