

TC Chairs Training Outline

1. Overview concepts
 - Public vs. Private
 - Common Interface Elements
 - Visibility based on Privileges
2. All Groups and My Groups
 - Differences between the 2 views
 - Personalization of My Groups page
 - Each group has the same set of tools – discuss navigation options
 - i. Calendar
 - ii. Document Repository
 - iii. Ballots
 - iv. Action Item Tracking
 - v. E-mail threads and notification
 - vi. Search

Go to a group where you are chair

3. Manage Roster
 - Entire list at bottom of page – query tool above to limit list view
 - Discuss Roles & Voting privileges
 - Export Roster – MS Excel or CSV
 - Add a New Member button – person must exist in Oasis overall membership

Name	Email	Company	Role	Voting	Manage
Chris Higgins	higgins@kavi.com	Kavi	TC Chair	<input checked="" type="checkbox"/> Voting member	<input type="checkbox"/> Delete
Jeffrey Mover	jeff-oasis1@kavi.com	Kavi	Member	<input checked="" type="checkbox"/> Voting member	<input type="checkbox"/> Delete
Just Training	martha-34@kavi.com	Kavi	TC Chair	<input checked="" type="checkbox"/> Voting member	<input type="checkbox"/> Delete
Karl Best	karl.best@oasis-open.org	OASIS	Member	<input checked="" type="checkbox"/> Voting member	<input type="checkbox"/> Delete
Sharon Burbine	sharon.burbine@oasis-open.org	OASIS	TC Chair	<input checked="" type="checkbox"/> Voting member	<input type="checkbox"/> Delete
Jeff Lomas	jeff.lomas@oasis-open.org	OASIS	Member	<input checked="" type="checkbox"/> Voting member	<input type="checkbox"/> Delete
Scott McGrath	scott.mcgrath@oasis-open.org	OASIS	Member	<input checked="" type="checkbox"/> Voting member	<input type="checkbox"/> Delete

Kavi Training TC Member Roster HELP ?

The group roster is printed below. Click on a name to see contact information, items this person has added and events they have attended. To download the roster to a CSV (comma-separated values) file, click the 'Export Roster' button at the bottom of the page.

[Add a New Member](#)

New Member* * Denotes required fields

1. Look up a list of names by entering a partial name or email address. Leave the textbox blank to look up all members.

2. Select a person from this list:

New Member Role*

Define the role for this new member.

Member
Active participant in the TC.

Observer
Observes activity within the TC (functionality around this role will be enhanced in late February 2003).

Secretary
Has the same management rights as a Chair within the online TC tools.

TC Chair
Chairperson for the TC

Assign as a voting member?

Some ballots may allow only members with voting privileges to vote.

Not a voting member

Voting member

4. Manage Email Templates
 - Email that goes to new members or deleted members

5. Calendar

- Add an event & attach a document to it.

Add Calendar Event [HELP](#)

Event Name* * Denotes required fields

Date*

February 7 2003

Time*

All Day to All Day Eastern Time

Repeating and Multi-Day Options

If your event happens more than once or spans multiple days, use the repeating options below.

Repeat: Never

Times to repeat:
 Repeat until: February 7 2003

Sharing

You can share this event with one or more of the following:

OASIS Open General Membership
 General Public

Event Type*

This is the type of event you are creating. If you would like to suggest a new event type, contact your [group administrator](#).

Conference Call: Telephone conference call
 Conference/Industry event
 Face-to-Face meeting: Face to face meeting

Description / Call-in Info

Agenda

Email Notifications

Send an email notification about this event to the selected groups.

Notes: Email notifications are not sent to the OASIS Open general membership or the General Public

This Group (Kavi Training TC)
 All groups with whom I've shared this event.

CC: Send a copy of this email to a comma-separated list of email addresses:
e.g., me@myorg.org,hi@anotherorg.org

Submit This Event

If you are satisfied with your entries above, click the "Add New Event" button to add your event to the calendar. For (optional) advanced options, scroll down and fill out that portion of the form.

Advanced Options (optional)

References

To reference other items, select them from the lists below. If the item you're looking for is not in the list, change the date range and select "Update List." To add more than one of a given type (document or event), select "Add Another >>" to add that item and allow selection of subsequent items.

Existing References	Items with * are private
There are no existing references.	

Create References

Create new document/link:

Upload:
 Link:
 State:
 Folder:
 Reference Type:

Select existing document/link:

Select:
 Reference Type:

To show more documents in the above list:

Submit This Event

If you are satisfied with your entries above, click the "Add New Event" button to add your event to the calendar.

6. Documents

- Add a new document

Add Document [HELP ?](#)

Document Source*
Browse for a file on your computer, OR enter the address of a web page (example: http://www.myorg.org/page.html)

Upload a document -OR- Address:

Folder*
This is the folder the document will be associated with.

Meeting Minutes

Sharing
You can share this document with one or more of the following:

OASIS Open General Membership
 General Public

State*

Committee Spec: Approved by the TC as described by the OASIS TC Process
 Draft: A preliminary sketch, outline, or version.

Description


Email Notifications
Send an email notification about this document to the selected groups.
Note: Email notifications are not sent to the OASIS Open general membership or the General Public

This Group (Kavi Training TC)
 All groups with whom I've shared this document.

CC: Send a copy of this email to a comma-separated list of email addresses:
e.g., sue@myorg.org,bill@anotherorg.org

- Manage a document (plus Revisions)

PPTraingOutlinev1.pdf Details [HELP ?](#)

 [PPTraingOutlinev1.pdf](#) (233K) [Modify](#) | [Delete](#) | [Add a Revision](#)

Description:



This is the second document

Group: Kavi Training TC
Submitter: Chris Higgins (higgins@kavi.com)
Date Submitted: Friday, 07 February 2003 09:19am
Document State: Committee Spec

Access:
This document is visible to Kavi Training TC and shared with:

- OASIS Open (General Membership)

Revisions:

Name	#	Size	State	Submitter	Date	Action
 Presentation.PDF	0	117K	Committ...	Chris Higgins higgins@kavi.com	07 Feb 2003	Details
 PPTraingOutlinev1.pdf	1	233K	Committ...	Chris Higgins higgins@kavi.com	07 Feb 2003	This doc

Comments [Add comment](#)

- Add a new Folder

Members Area > All Groups > My Groups > Kavi Training TC > Documents

Home Calendar Documents Ballots Action Items Email

Kavi Training TC Documents [HELP ?](#)

To find specific documents, enter search options in the box below.
For advanced search options, click More Options.

Folder: All Folders Full Text Search: Submitted Within:

All
 Last 30 days
 Last 30 days or
 documents per folder

[More Options](#) Find Documents

[Add New Folder](#)

Calendar Documents [Add New Document](#) | [Edit Folder](#) | [Delete Folder](#) 3 of 3 Items

Document Name	#	Size	State	Submitter	Date	Action
oasis_tc_chair_brid...		17K	Draft	Chris Higgins higgins@kavi.com	07 Feb 2003	Manage
test.txt		1K	Committ...	Unknown	06 Feb 2003	Manage
Homework1.doc		19K	Draft	Just Training martha-34@kavi.com	05 Feb 2003	Manage

Add a New Folder [HELP ?](#)

Folder Name* * Denotes required fields
 This should be a descriptive name; for example, Meeting Notes.

Default Folder
 Check here to make this folder the default folder into which documents are added.
 Make this folder the default.

Add New Folder
 If you are satisfied with your choices above, click "Add New Folder" to add the folder now. If you want to use advanced options, scroll down and use the lower part of the form.

Advanced Options (Optional)

Chair Only
 Can only the Chair(s) add documents to this folder?
 Yes, only the Chair(s) can add files to this folder.
 No, any member can add files to this folder.

Comments Allowed Default
 Are documents added to this folder allowed to have comments?
 Yes, documents in this folder are allowed comments.
 No, documents in this folder are not allowed comments.

Auto Naming
 An auto-naming folder automatically assigns names to documents added or moved into it. The name it assigns is based on the format you enter below. The default for this organization is \$year2-\$month2-\$docum.\$revnum.\$extension. See the list of available variables below.
 Auto-name documents in this folder using this scheme:
 \$year2-\$month2-\$docum.\$revnum.\$extension

7. Search

- Search 1 to many groups at a time

Members Area > All Groups > My Groups > Search

Search [HELP ?](#)

The search was last updated February 6 2003 05:22 pm, PST. Items added after this time will not show up in the search results below.

Search:

Group:

Item:

- Documents
- Email
- Ballots
- Events
- Action Items

8. Balloting

- Vote on existing ballot

Members Area > All Groups > My Groups > Kavi Training TC > Ballots > Ballot Details

Home Calendar Documents Ballots Action Items Email

Vote [HELP ?](#)

Hello, Chris. Please take a moment to cast your vote. Your vote may not be changed once cast. The results of your vote will be listed by the company or organization you represent and viewable by members of Kavi Training TC

Should we have a snow day [Modify](#) | [Edit Votes & Proxy Vote](#) | [Eligible Voters](#) | [Close](#) | [Delete](#)

This decides whether or not you must come to work.

Yes
 No
 Abstain

[+ Associate a document and/or comments with my vote...](#)

Opening: Friday, 7 February 2003 @ 9:00 am PT
 Closing: Friday, 7 February 2003 @ 12:00 pm PT
 Group: [Kavi Training TC](#)

- Create a Yes/No Ballot

Add Ballot HELP ?

Creating a ballot has 3 steps:

1. **Setup**
2. Preview / Commit
3. Done

Title * * Required fields

Description / Question *

What type of question is this? *

Yes/No
If you selected "Voter chooses x options", enter the options here ----->

Allow voter to specify "other"

option 1:
option 2:
option 3:
option 4:
option 5:
option 6:

Ballot Opening Date *

February | 10 | 2003 | 4:00 pm | Eastern Time

Ballot Closing Date *

February | 10 | 2003 | 4:00 pm

Who Can Vote? *

To see who is a voting member in this group see the [roster](#).

Voting members only
 All Members of Kari Training TC
 Only the following members of Kari Training TC:

Karl Best
Sharon Burbine
Chris Higgins
Jeff Lomas
Scott McGrath

Use Shift and CTRL to select/deselect multiple voters.

Meeting Attendance Rules

If you use the checkbox below, your set of eligible voters will be filtered based on meeting attendance. An editable list of eligible voters will be shown on the next page of this form.

This group has not tracked attendance for any meetings.
To track attendance, go to the [calendar](#), select an event by clicking on its icon or its description, then click "Track Attendance"

Ballot Results

Ballot creators can view detailed results at any time. The following options define who else can see the results.

Who can view the results?

members of this group
 OASIS Open General Membership
 General Public

When should the voting results be made available?

As soon as the ballot opens.
 After the ballot closes.

What type of results should be made available?

Show a detailed list of voters and their votes.
 Just show a summary of the results.

Can voters change their votes?

Yes, voters are free to change their votes while the ballot is open.
 No, voters may only vote once.

Email Notifications

Email eligible voters when this ballot opens and closes
 Send a reminder to eligible voters (who have not yet voted) on

Month | Day | Year | Time

Advanced Options

References

To reference other items, select them from the lists below. If the item you're looking for is not in the list, change the date range and select "Update List." To add more than one of a given type (document or event), select "Add Another >>" to add that item and allow selection of subsequent items.

Existing References Items with * are private

There are no existing references.

Create References

Create new document/link:

Upload:

Link:

State:

Folder:

Reference Type:

9. Action Items

- Create an assign an action item to another member
- Only chairs have permission to close out an action item

Add Action Item HELP ?


Description* * Denotes required fields

Owner

Select an owner (assignee) for this action item in the list box below.

Comment

Due Date

Month Day Year 

Email Notifications

Notify the group about this action item

Add Action Item

If you are satisfied with your entries above, click the "Add Action Item" button to add your action item. For advanced options, scroll down to that part of the form.