Platform Overview

1 People.................................................................................................................................................. 3
  1.1 People overview.......................................................................................................................... 3
  1.2 Finding a user.................................................................................................................................. 3

2 User profiles...................................................................................................................................... 5
  2.1 Endorsements............................................................................................................................. 5
  2.2 Endorse existing & new skills.................................................................................................... 6
  2.3 Recent activity tab...................................................................................................................... 6

3 My profile......................................................................................................................................... 7
  3.1 Edit profile details...................................................................................................................... 8
  3.2 Edit your expertise...................................................................................................................... 9

4 Personal links................................................................................................................................... 10
  4.1 Add a personal link................................................................................................................... 10
  4.2 Edit personal links................................................................................................................... 11
  4.3 Delete personal link.................................................................................................................. 11

5 My settings...................................................................................................................................... 12
  5.1 Change password...................................................................................................................... 13
  5.2 Notification settings.................................................................................................................. 13
  5.3 News channels.......................................................................................................................... 14
  5.4 Interface settings....................................................................................................................... 14
  5.5 What’s new options................................................................................................................... 15
  5.6 Location & timezone................................................................................................................ 15

6 Your organisations page.................................................................................................................... 16
  6.1 See who works for your organisation...................................................................................... 18
  6.2 Document folder....................................................................................................................... 19
  6.3 View/download document.......................................................................................................... 19
  6.4 Upload a document.................................................................................................................... 20
  6.5 View an article............................................................................................................................ 21
  6.6 Viewing multilingual articles..................................................................................................... 22
  6.7 Liking an article.......................................................................................................................... 22
  6.8 Commenting on an article.......................................................................................................... 22
  6.9 Add an article............................................................................................................................. 23
7 Notification & Messages................................................................. 25
7.1 Notifications.................................................................................. 25
7.2 Message Inbox.............................................................................. 26
7.3 Read message............................................................................... 26
7.4 Reply/forward/delete................................................................. 27
7.5 Compose message...................................................................... 27
7.6 Message notification settings................................................... 28
1 People

1.1 People overview

The people list is a searchable, filterable database, allowing viewers to locate certain information about a particular person, or selection of people.

1.2 Finding a user

Type the name of the user you wish to locate into the Search bar and click the ‘search’ icon.
Alternatively, click the ‘Advanced Search’ arrow.

- **Keywords**: Search users by keyword, e.g. Alex, Colombia.
- **First name, Surname, Job Title**: Search users by name and/or job title.
- **Role**: Filter users by role. As you start typing, relevant roles will appear from a dropdown list which you can select from. Select ‘Any’ (default) or ‘All’ as required.
- **Extranet area**: Filter users by extranet area. Select ‘Any’ (default) or ‘All’ as required.
- **Company, Address, Landline, Mobile**: Search users by company name, address, landline telephone number or mobile phone number.
- **Preferred contact method**: Search users by their preferred contact method. As you start typing relevant contact methods will appear from a dropdown list which you can select from.

Once filter options have been specified, click the search icon. A drop down field is displayed to the right of the Search button. If required, select the number of results to display per page from the drop down list.
2. User profiles

To view a user’s profile, click on their profile photo or name. The ‘Profile’ tab, which is selected by default, displays information about the user.

2.1 Endorsements

Similarly to the popular business-oriented social networking service, LinkedIn, users are able to endorse other users for specific skills. Endorsed skills are displayed on users’ profiles.

The number of people who have endorsed the user for a particular skill is displayed. Click on the number to see who has already endorsed the user.

To find other users with a matching skill, click on the name of the skill.
2.2 Endorse existing & new skills

To endorse a user for an existing skill, which is already listed on their profile (i.e. they have previously been endorsed for), hover over the plus icon and click.

To endorse a user for a new skill, which they have not previously been endorsed for, start typing the skill into the text box. Existing skills matching the search will be displayed. Select an existing skill to endorse the user with that skill.

Once you have selected an existing skill, click **Endorse**.

2.3 Recent activity tab

The ‘Recent Activity’ tab displays the following:

- Posts submitted by you (including replies)
- Posts submitted directly to you, by other users
- Posts in which you have been tagged
- Posts you have ‘liked’
3  My profile

To view your own profile click on the profile button on the main navigation bar at the top right and select your name from the drop down list.
3.1 Edit profile details

From anywhere on the site click on ‘Settings’ in the top right of the navigation bar. Select the ‘My profile’ option from the drop down menu that appears. Modify your profile details as required and click **Update My Profile**.
3.2 Edit your expertise

It is possible to assign skills to your profile. Select the 'Expertise' tab, search for the relevant skills and click Add.

Select the appropriate skill level (i.e. Unrated, Basic, Average, Good, Expert) from the dropdown to the right of each skill and click Update My Profile.
4 Personal links

Personal links can be accessed from the navigation bar at the top of the screen. These act as a ‘favourites’ menu where you can save web addresses and access again.

You can access the ‘edit personal links’ area by clicking your personal links menu on the navigation bar and clicking **edit personal links**.

4.1 Add a personal link

To create a new link, click on ‘edit personal links’ in the personal links menu. Complete the details in the ‘Add’ row as required.

- **Menu item**: Insert a display name for the link.
- **Link**: Insert the URL/web address.
- **Open in new window**: Tick the checkbox if the link should open in a new browser tab.

Click **Update selected** to save.

**NB**: To specify a page within the Caritas Community site, use a relative link, i.e. `/intranet/people` instead of `http://community.caritas.org/intranet/people`
4.2 Edit personal link

To modify an existing personal link, follow the same steps when adding a personal link, edit the details as required and click **Update selected** to save your changes.

![Update selected button](image)

4.3 Delete personal link

To delete a personal link, tick the relevant checkbox in the ‘Select’ column and click **Delete selected**.

![Delete selected button](image)
5 My settings

From anywhere on the site click on ‘Settings’ in the top right of the navigation bar. Select the ‘My settings’ option from the drop down menu that appears.

The settings page has the following tabs...

My settings page
## 5.1 Change password

Select the ‘Change password’ tab to modify your password. Insert your current (old) password, your new password, followed by your new password again to confirm and click **Save My Settings**.

**NB:** It is possible to switch between tabs without clicking **Save My Settings**. If you modify your settings in one tab and then switch to another without clicking **Save My Settings**, the settings will be retained.

## 5.2 Notification settings

Select the ‘Notification settings’ tab to modify your notification settings. To be notified when documents, which you own, have been updated, moved or deleted, tick the checkbox and click **Save My Settings**.
5.3 News channels

Select the 'News channels' tab to subscribe or unsubscribe from news channels. Tick or un-tick the relevant checkboxes and click Save My Settings.

**NB:** Checkboxes, which are greyed out, are mandatory news channels and cannot be unsubscribed from.

5.4 Interface settings

Select the 'Interface Settings' tab to switch between languages. Select your language from the 'Interface language' drop down list and click and click Save My Settings.

**NB:** The language options available are: English, US International, French & Spanish.
5.5 What’s new options

‘What’s New’ is a component used on the homepage, which displays recently added and updated documents, publish pages and forum posts.

Select the ‘What’s New options’ tab to configure your settings, denoting which objects should be displayed in the list. Tick or un-tick the relevant checkboxes, define the number of items to be displayed and click **Save My Settings**.

5.6 Location & timezones

Select the ‘Location & timezone’ tab to change your timezone. Select ‘Set time zone’ from the location drop down list, then select the required timezone and click **Save My Settings**.

**NB:** If the ‘Location’ field is set to Default, it is not possible to modify the timezone.
6 Your organisations page

To access your organisations page hover over ‘Updates & Alerts’ in the main navigation bar at the top of the site and select ‘Regions and Organisations’ from the drop down list.

You will then be presented with the main member organisations page. From here you can use the navigation bar down the left hand side of the page to select your organisation.

Countries are split between the following 7 continent categories: Caritas Africa, Caritas Asia, Caritas Europa, Caritas Latin America & Caribbean, Caritas Middle East & North Africa, Caritas North America and Caritas Oceania.
Each organisation page has a small description, contact, website and social media details. Below this are links to the document folder and to see who works for your organisation, as well as buttons for creating an article and asking a question. Articles related to your organisation will appear below the organisation details.
6.1 See who works for your organisation

To see all the users who work for the same organisation as you click on the link below the contact details that says ‘Click here to see the users who work for this organisation’.

This will take you to the people page with a list of users who work in the same organisation as you. You can click on any of the users listed to go to their profile page to get further information and contact details.

**Example list of users who work for your organisation**

**NB:** You can use this link on any of the organisation pages, not just the one you work for, to find contact details for someone if you know what country or continent they work in for example.
6.2 Document folder

To access the document folder for your organisation. Click on the link below the contact details that says 'This is the document folder'.

This will take you to the document folder which is a storage area for documents related to your organisation that can be updated by any users of the site.

6.3 View/download document

To view a document click on the title of the document. This will take you to the document viewer. From here you can view the document and download it using the 'Download document' button. You can also see who has modified and viewed the document.
6.4 Upload a document

To upload a document to your organisation's document folder, click on the 'Add Document' button from within the document folder.

You will be presented with a menu to upload your document. Click on the 'Choose file' button to select the file from your computer. If you need to mark it as a draft document, you can do this by selecting the 'Mark as draft' checkbox. Add a document description if desired. Select the 'Add a Document' button to add the document to your organisation's folder.
6.5 Viewing articles

To view an article related to your organisation, click on the image or title of the article you wish to view. The article will be displayed.

---

DRC: nearly 5 millions of beneficiaries of Caritas Congo Asbl actions in 2016

The Executive Secretariat of Caritas Congo Asbl has proceeded to the presentation of its activity report carried out in 2016 this Friday, February 24, 2017. The interventions of this technique body charged of s...

0 comments • Last modified on 12 May 2017 in Caritas Democratic Republic of Congo

---

DRC: nearly 5 millions of beneficiaries of Caritas Congo Asbl actions in 2016

The Executive Secretariat of Caritas Congo Asbl has proceeded to the presentation of its activity report carried out in 2016 this Friday, February 24, 2017. The interventions of this technique body charged of social pastoral of Catholic Church in DRC have allowed to provide care, training, and support in various manners nearly 5 millions of peasants. And this, in all 26 provinces of country. [http://example.com/]

Add a comment

---

Download article as a PDF doc

Like button

Subscribe button
6.6 Viewing multilingual articles

Articles which are available in more than one language will display a language drop down above the article content. Select the required language from the drop down list.

6.7 Liking an article

To ‘like’ an article, click **Like** below the article title.

6.8 Commenting on an article

If commenting is enabled, users will see a ‘Add a comment’ area below the article content.

Once you have written your comment just click the ‘Save’ button to post it to the article. Other users are able to ‘Like’ and ‘Reply’ to your comment and you can reply or delete it.
6.9 Add an article

To create a new article related to your organisation, click the ‘Create an article’ button at the bottom of your organisation page.

You will then be presented with the ‘Add Article’ page.
Complete the details as required.

- **Language:** Select the language of your article from the dropdown list.

- **Article Title:** Insert the title of the article.

- **Category:** Select the appropriate category from the list, please note you will only be presented with categories in which you are permitted to publish.

- **Tags:** Enter the tag names required, separated by a comma. Popular tags are displayed under the tag field.

- **Author:** By default, the author of the article is the person creating it. It is possible to specify an alternative author if you wish.

- **Article Cover/Thumbnail:** Click ‘Upload Cover Image’ to upload an appropriate image for the article. The image will be displayed to the left of the article in the list of articles, and at the top of the article when viewing it. Images must be at least 480 pixels wide and 270 pixels tall.

- **Embed Video:** Insert the iframe code for your video. The video will be displayed at the top of the article. If a cover image is also uploaded, the video will take precedence.

- **Description:** This is the main body of the article.

- **Enable Commenting:** Tick the checkbox to enable or disable commenting.

- **Topic/Region/Country:** Choose the appropriate topic, region and country from the dropdown lists.

- **Date:** Please select any relevant date from the calendar, note the article publish date will be the date the article is published.

- **Status:** Select the status of your article from draft, publish or archive.

**NB:** Users who have ‘Create an Article’ rights on a category but do not have ‘Publish’ rights, will not see the Status option. Instead, the following message will be displayed:

>You don’t have permission to publish this article: The status of this article will be set to DRAFT.

Users with ‘Publish’ rights on the category will then be able to review the article and publish it accordingly.

Once all details have been completed, click Add Article.
7 Notifications & Messages

The messages application within the Caritas community site, allows you to send and receive messages to other users. In addition to this, other sections of the site can send you system generated notifications and messages. Messages are sent in near real-time speed, and users are alerted to such messages immediately.

7.1 Notifications

A small icon will appear below the notifications button above the main navigation bar, alerting you of any new notifications or messages when you get them.

Click on the notifications button to see the summary list which is an overview of your notifications and messages.

Messages from other users can be read within this summary list by clicking on the subject. To collapse an expanded message, simply click on the subject again.
7.2 Message Inbox

Your inbox can be quickly accessed by clicking on the number of messages icon on the main navigation bar and clicking ‘View all’. Alternatively click ‘Messages’ in the menu bar.

Unread messages will appear in bold. The sender will appear to the right of the message. Messages will either be from an application within the site, e.g. Updates & Alerts, Files or directly from a user.

The date and time the message was sent will also be displayed to the right of the message.

To search messages, insert a keyword into the text field and click ‘Search’.

It is possible to filter the search by selecting the relevant type from the drop down list. By default, ‘All types’ is selected. The filter can be used independently from the search, i.e. a keyword does not have to be defined if a type has been selected.

7.3 Read message

To read a message, simply click on the subject and the full message will be revealed.

To collapse an expanded message, simply click on the subject again.

To view all recipients of the message, click Recipients underneath the message subject. A small pop up window will be displayed, showing the message recipients. Envelope icons with a tick, represents that the user has read the message.
7.4 Reply/forward/delete

To reply to a message, hover over the subject and click ‘Reply’. Then follow the steps in section 7.5 Compose message.

To forward a message, hover over the subject and click ‘Forward’. Then follow the steps in section 7.5 Compose message.

To delete a message, tick the checkbox to the left of the message and click ‘Delete selected’. Multiple messages can be deleted at once. To delete all messages, simply click Delete all.

7.5 Compose message

To send a message to a user, click ‘Compose’ on the left hand side.
Send to: Specify the message recipients. As you start typing users will be suggested.

Subject: Insert the message subject.

Message text: Insert the message text. There are some simple formatting tools which you can use to format your message.

Once all details have been completed, click ‘Send’.

7.6 Message notification settings

You can configure your personal notification settings. To configure settings, click ‘Settings’ on the left hand side of the message inbox.

Choose a default notification method by selecting the appropriate option from the drop down:

- In-System message only: Notifications will only be received as In-System messages.
- Copy notification to email: Notifications will be received as In-System messages and copied to the email address specified within the user’s profile.
- E-mail only (no in-system notification at all): Notifications will only be sent to the email address specified within the user’s profile.
- Daily Digest: Notifications will be pooled daily and sent as a digest.
- Weekly Digest: Notifications will be pooled weekly and sent as a digest.
- Monthly Digest: Notifications will be pooled monthly and sent as a digest.
**NB:** The default option is In-System message only. It is possible to select different options for specific applications. By default, the notification method will be that which is set as default.

Choose a time period after which read messages should be deleted from your Inbox, by selecting the appropriate option from the drop down. The default option is 3 months.

It is possible to select different options for specific applications. By default, the time period after which read messages will be deleted, will be that which is set as default.

After making any changes click ‘**Save My Settings**’ to make them permanent.