# OCOPOMO
# Open Collaboration in Policy Modelling

## D4.2 System and User Documentation

### A: User Manual on Collaboration and Scenario Generation Tools

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| Authors | **Peter Bednár, Peter Butka, Karol Furdík** |
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| 100 | 12/03/2013 | Integration of inputs, updates of all chapters. Consolidation, corrections and finalisation. | Karol Furdík |

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## 1. INTRODUCTORY NOTES

This user manual describes the usage of *Scenario Generation Tools* and *Collaboration Tools* included in the integrated OCOPOMO toolkit for collaborative policy development. This suite of tools is implemented as an extension of the Alfresco Share platform (Alfresco Share, 2011), which provides a comprehensive usage guidelines and supporting materials, namely:

- Alfresco Share wiki, http://wiki.alfresco.com/wiki/Alfresco_Share;
- Documentation of Alfresco Share, version 3.5 (Alfresco Share Documentation, 2012), http://docs.alfresco.com/3.5/topic/com.alfresco.team.doc/topics/uh-welcome.html;
- General Alfresco site, http://www.alfresco.com.

Furthermore, this document complements the main text of the D4.2 deliverable by providing how-to instructions for use of tools and user interfaces during the first and second phase of the OCOPOMO process, i.e., the definition of an initial policy scenario and the collaborative development of evidence-based scenarios.

Other information related to the installation, maintenance, connection to the whole OCOPOMO platform, and technical details of the here-presented tools can be found in the main text of the D4.2 deliverable.

# 2. OVERALL DESCRIPTION OF THE TOOLS

This chapter presents a general information on the *Scenario Generation Tools* and *Collaboration Tools* of the OCOPOMO toolkit, namely an overview of involved user roles, structure of provided user interface and location of particular tools, as well as a set of instructions for the maintenance and customisation of the tools.

## 2.1. USER ROLES

User roles for the underlying OCOPOMO process, which is supported by the here-presented set of tools, were proposed in the D2.1 deliverable (Mach et al, 2010) as it is presented in Table 1.

**Table 1:** User roles applied in the OCOPOMO system.

| Icon | User Role |
|---|---|
| | **Politician** |
| | **Civil servant** |
| | **Stakeholder** |
| | **Facilitator** |
| | Analyst |
| | Modeller |
| | **Administrator** |

Since the *Scenario Generation Tools* and *Collaboration Tools* support the two initial phases of the OCOPOMO process, direct participants of the policy development (i.e., *Politician*, *Civil servant*, and *Stakeholder* roles) are involved in most of operations provided by the tools. Moreover, the *Facilitator* role is dedicated to provide a methodological support, while *Administrator* is responsible for the technical set up and maintenance of the tools. The *Analyst* and *Modeller* roles are not participating in the process phases supported by here-presented tools[1].

The icons of user roles, presented in Table 1, are referenced and used as labels in "how to" instructions presented below. This labelling indicates the proposed actors/consumers of described operations.

## 2.2. USER INTERFACE AND STRUCTURE OF THE TOOLS

The default user interface of the *Scenario Generation Tools* and *Collaboration Tools* is presented in Figure 1. Since these tools are built upon the Alfresco Share framework, the layout of the user interface can be customised both on a global site level as well as individually for each of end users, as it is explained in section 2.4. In the default configuration of the toolkit, particular tools are accessible via links in the navigation bar, as it is depicted in Figure 1.

[1] The distribution of user roles into the respective phases of the OCOPOMO process and organisation of the whole community of involved users could be, however, a more complex task that belongs to methodological issues. As such, it is detailed separately in the D8.1 deliverable (Scherer et al, 2013).

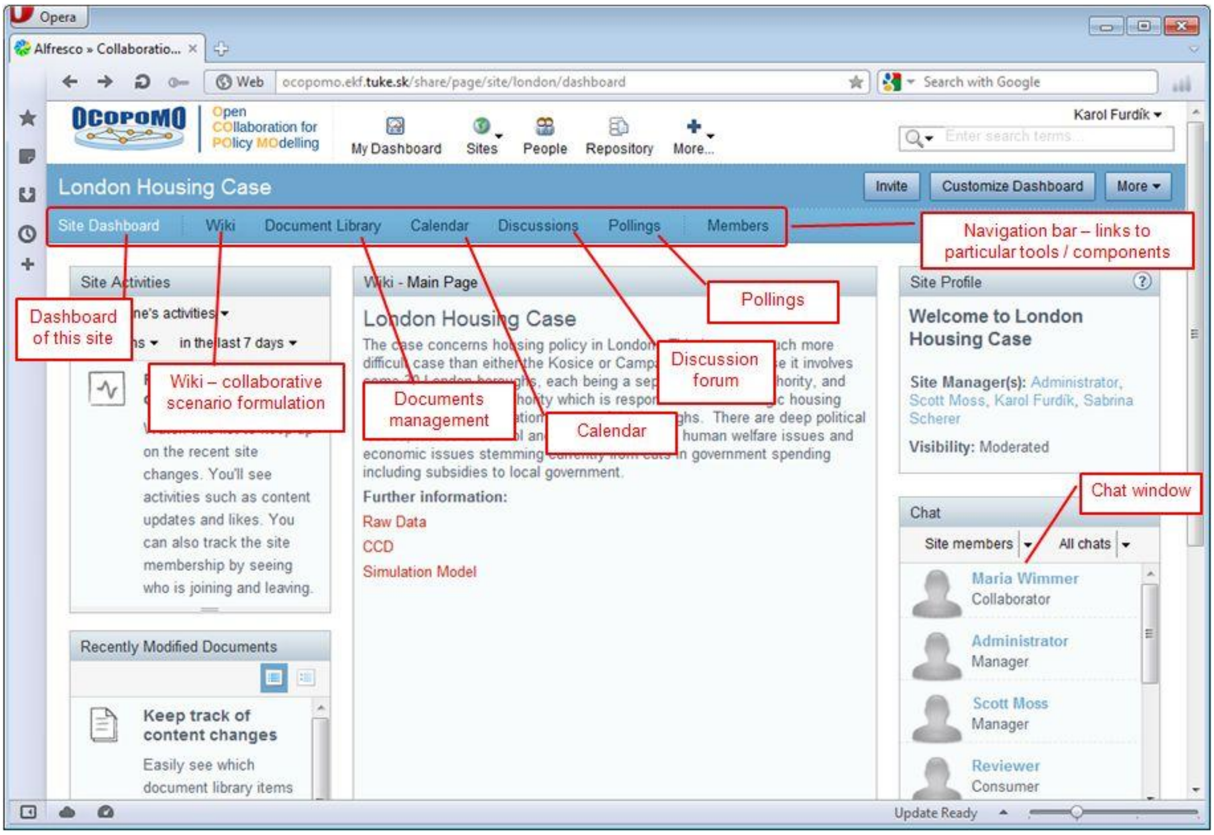



**Figure 1:** Alfresco Share-based web interface of the OCOPOMO toolkit, the Site Dashboard layout.

To support a getting started procedure, we are presenting here some of the most fundamental instructions on the usage and maintenance of the provided Alfresco Share application in the OCOPOMO policy modelling process.

## Where to start formulating a scenario?

Scenarios can be formulated as texts in wiki pages; references to various background materials and supportive documents are usually included as links in the wiki content. If you like to start formulating your own the scenario (of both initial or evidence-based type), please follow these instructions:

1. Click on the *Wiki* link in the navigation bar.
2. In the displayed menu, click on the *New Page* link.
3. Proceed with text editing according to the instructions presented in section 3.1.

**Tip:** The initial scenario can be located on the main wiki page (displayed after clicking the *Wiki* link by default), which corresponds to the introductory page of the whole site. This way, the initial scenario will be easily accessible by a single click on the *Site Dashboard* link.

## How to locate a specific site and/or page?

There are several ways of locating a stored information, depending on its type. If you like to navigate to a specific collaboration site, you can use the following options:

1. Click on the *My Dashboard* link in the upper bar.
2. On the *My Sites* dashboard, click the name of the site you want to navigate to.

The second way of navigating to a specific collaboration site is as follows:

1. Click on the *Sites* link in the upper bar.
2. Select from the displayed list of *My Favorites*, or select the *Search for Sites* option to initiate a keyword search of available sites.

To locate a particular page or file within a collaboration site, the following facilities are provided:

1. Standard or advanced keyword-based search - the query field is located in the right hand side of the upper bar.
2. Wiki pages can be found under the *Wiki* link, and then the *Wiki Page List* link.
3. Stored files can be accessed by *Document Library* link; a sorted or filtered list can be obtained by means of the *Select* command.
4. Finally, published resources of any type (wiki pages, files/documents, discussions, ...) can be located by *tags* displayed in a list on the left hand side of respective view (e.g., *Wiki*, *Document Library*, *Discussions*, etc.). By clicking on a tag, resources annotated by this tag are filtered out and displayed in a list.

### How to insert background materials for a scenario?

Background materials, represented as files of various formats, are stored in the *Document Library*. To insert a new background material for a scenario, please follow these instructions:

1. Click on the *Document Library* link in the navigation bar.
2. In the displayed menu, click on the *Upload* link. Click the *Select file(s)* icon in the displayed dialog, specify a local file(s) and confirm the upload. The file(s) are stored in the Document Library.

To include a reference to the file(s) from a scenario, please follow these instructions:

1. Navigate to the scenario wiki page (e.g. by *Wiki* and *Wiki Page List* links).
2. Click on the *Edit* link next to the wiki page. The wiki HTML editor window is displayed.
3. Type and select a text that will be a link to the just uploaded file. Then click on the *Insert Document Link* icon, navigate to the file in the displayed list, select the file by clicking on the "+" sign and click OK. The link will appear in the wiki page content.
4. Do not forget to click *Save* to confirm the changes.

Please refer to section 3.2 for further usage instructions on the Document Library.

### Which tools can be particularly used for exchanging ideas and opinions on published scenarios?

The collaborative work on scenarios and discussion on possible policy alternatives is supported by a variety of tools, namely:

1. Wiki, as a shared space for formulating scenarios, enables concurrent scenario development. Each version of a wiki page is stored automatically and is accessible for further revisions.
2. Commenting of scenarios, using the *Add Comments* button located under the wiki content.
3. Discussion space, available under the *Discussions* link on the navigation bar.
4. Opinion polling, available under the *Pollings* link on the navigation bar.
5. *Chat* dashlet, which enables a real-time online communication between the site members.

5. Calendar functionality, available under the *Calendar* link on the navigation bar, which enables to organise the collaborative work on scenarios according to a defined time schedule.

Usage instructions for all the mentioned tools are provided below, in respective sections of Chapter 3.

## 2.3. DASHBOARD, SUPPORTED DASHLETS AND LAYOUTS

The content on the Alfresco Share is organised into collaboration sites, which correspond in OCOPOMO to particular policy modelling projects. Dashboard, as the main unit of organising resources on the web site in Alfresco, provides an overview information about the project(s) and enables maintaining the site content by means of implemented *Scenario Generation Tools* and *Collaboration Tools* (cf. Figure 1 above).

The layout of site and user personal dashboards can be customised and configures according to user preferences, namely by displaying or hiding some of functional site components - dashlets. An overview of dashlets that are available in a particular Alfresco Share installation can be obtained after clicking the *Customize Dashboard* button, located in upper right-hand side of the navigation bar. It displays the page enabling to change the dashboard layout and reorder, activate, or hide some of the available dashlets (see in Figure 2).

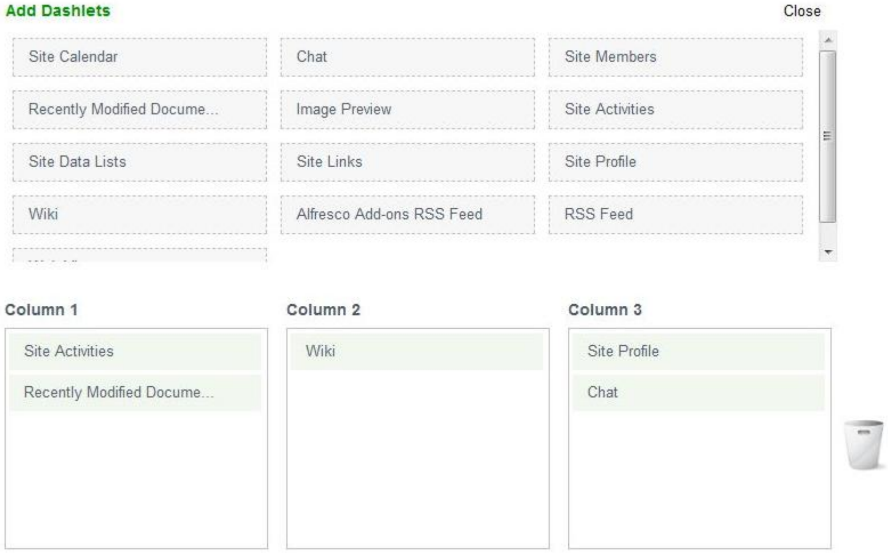



**Figure 2:** Alfresco Share-based web interface of the OCOPOMO, the Site Dashboard layout.

The installation package of Alfresco Share for OCOPOMO supports the following dashlets for the personal or site dashboard:

- **Getting Started** dashlet displays helpful information for getting started in the site and provides links to perform common tasks.
- **Chat** dashlet allows real-time online communication between the site members.
- **Site Profile** dashlet contains a summary of the site details.
- **Site Colleagues** dashlet lists the site members and their assigned roles.
- **Site Calendar** dashlet contains a rolled-up view of events for this site.
- **Site Activities** dashlet tracks the most recent activities that have been performed in this site.

- **Recently Modified Documents** dashlet displays documents in this site's Document Library that have been added or edited in the past seven days.
- **Wiki** dashlet displays the specified wiki page. The Configure link on the dashlet enables the Site Manager to select the desired page. Click the name of the wiki page in the dashlet header to display that page in the Wiki page component.
- **Image Preview** dashlet displays a thumbnail of all images contained in the site's Document Library.
- **RSS Feed dashlet**, by default, is configured to display the collaboration site feed with all activities (it can be also used to integrate feeds from external sites).
- **Web View** dashlet can be configured to display any website.

Each site component (i.e., dashlet page) usually displays the content in two layouts: list and details.

**List layout** is displayed in Figure 3. In the centre of the page there is a list of component's items (i.e., uploaded documents for *Document Library*, wiki pages for *Wiki*, etc.). On the right hand site of the list layout is the filter section, which can be used in order to filter the list of items. Common options for filtering are: display all items, items created/modified by you or recently added/modified items.

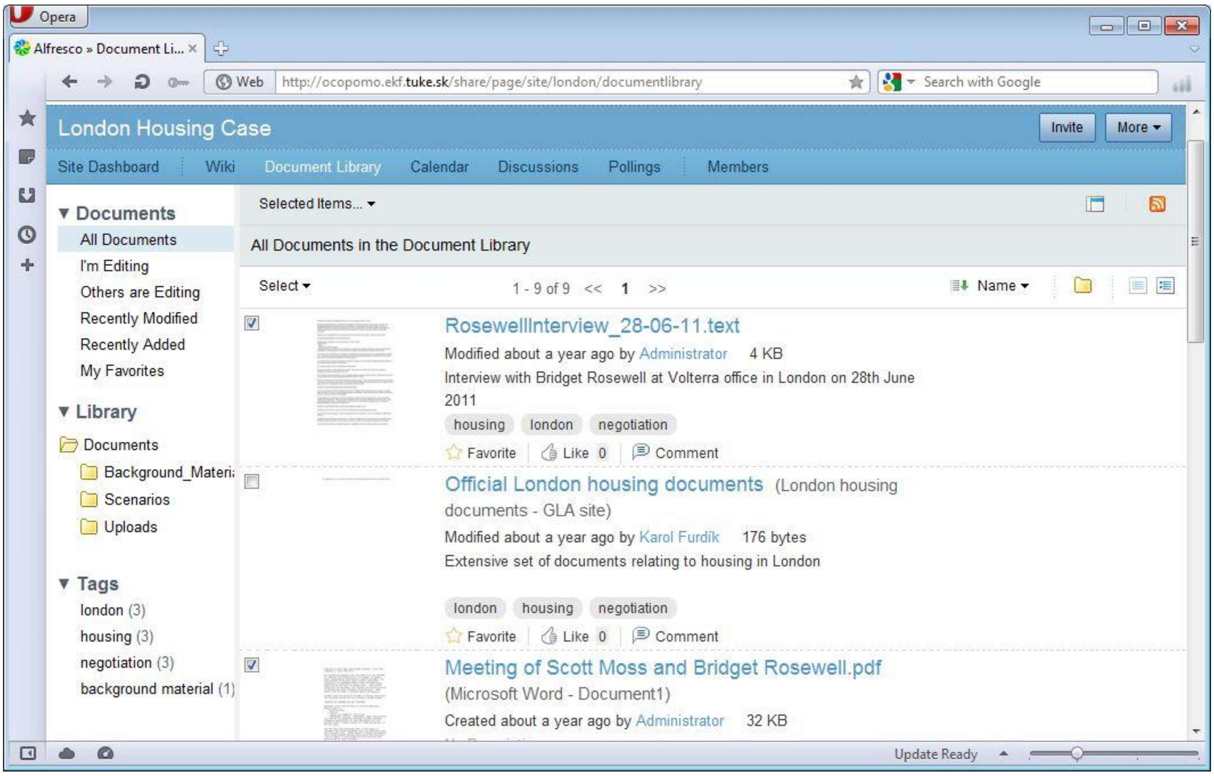



**Figure 3:** List layout of Document Library.

**Detailed layout** depends on a particular component; however, it usually displays the content of the item (i.e. a discussion topic and answers, questions of a polling, or a text of wiki page) or the content preview (as it is displayed on Figure 4 for *Document Library*). Detailed layout of a site component also provides an access to the actions that are supported for the item - for example, editing and sharing.

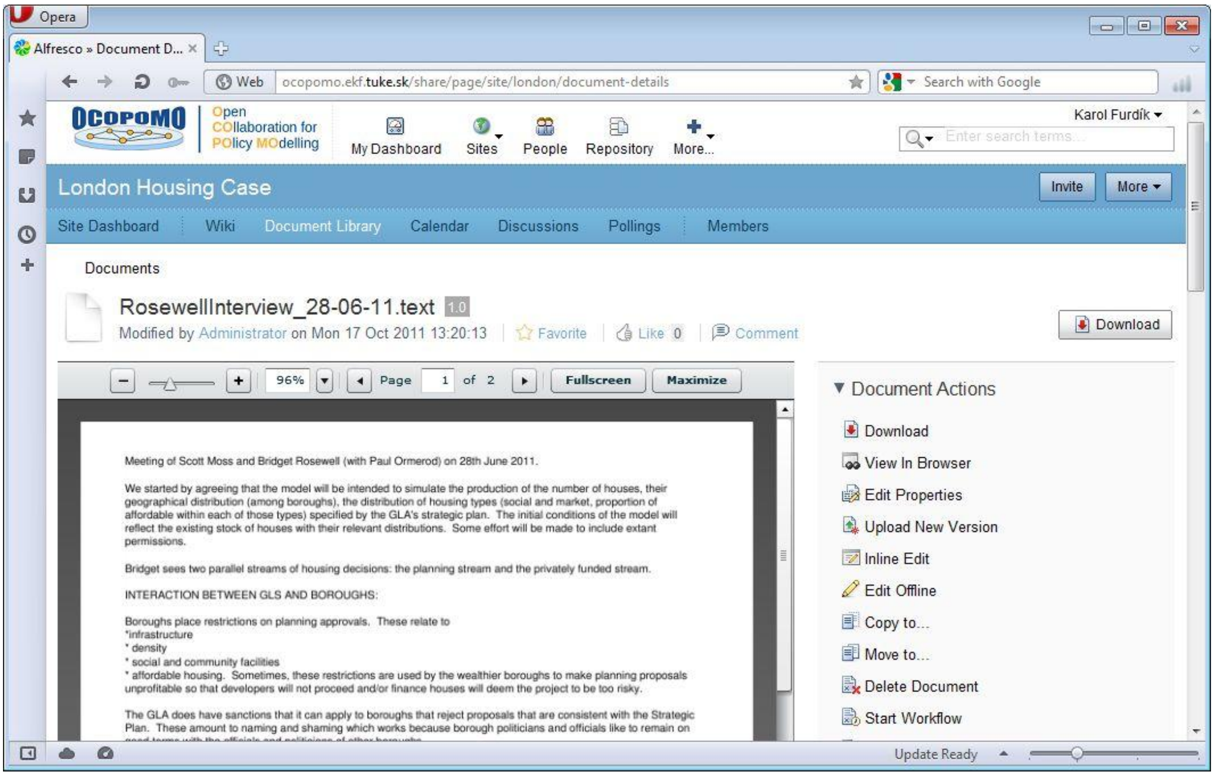



**Figure 4:** Detailed layout in Document Library - displayed content of a document.

## 2.4. SITE MANAGEMENT AND CUSTOMISATION

This section contains a more detailed instructions on the maintenance and customisation of a collaborative site, which is mostly under the responsibility of facilitators and system administrators.

### How to create a new site?

If you like to create a new collaboration site, please follow these instructions:

1. Click on *Sites* button in the top banner.
2. In the displayed form, specify the name for the new collaboration site. Optionally you can specify description and change URL name generated from the site name (URL name is the part of the site URL such as http://domain.com/share/page/site/<URL Name>/dashboard).
3. Select type of the site, default configuration is *Collaboration site*.
4. Specify if the new site will be private or public. For public sites you can specify if the site membership will be moderated, i.e. if the site managers can control who joins the site.
5. Click on *OK* button to create new site. If you like to cancel creation of the new site, click on the *Cancel* button.

Note that you have to have administrator access rights to create a new site. You will be automatically added as the site manager to the created site. You can later edit site details using the following steps:

1. Navigate to the site dashboard (e.g. click on site link in the *Sites* menu).
2. Click on *More* button on the right-top side of the page and select *Edit Sites Details* menu. In the displayed dialog you can change site name, description and visibility. Note that you cannot change URL site name.

### How to invite a new site member?

If you like to invite new site member, please follow these instructions:

1. Navigate to the dashboard of the site (select site from the *Sites* menu in the top banner).
2. Click on *Invite* button in the top-right side of the page.
3. On the displayed page, type the user name and click on *Search* button to search registered users. You can type a part of the user name or a real name (e.g. letters "jo" will match "John" first name or "john.smith" user name). In the displayed list of registered users, select the user you like to invite as the site member and click on *Add* button. In the list of invited people select the role for the new user. Default roles are:
   - Manager – has full access to the site and can invite new members
   - Collaborator – can read, upload, checkout, and edit the content
   - Contributor – can read and upload new content
   - Consumer – can read only the site content
4. Optionally you can invite more people. To finally invite the new members, click on *Invite* button.

Note that invited user has to accept the invitation to become a site member. When the user accepts the invitation, site manager is notified in the task dashlet. To accept the invitation, user can follow these steps:

1. Navigate to your personal dashboard (click on *My Dashboard* button in the top banner)
2. Check the list of tasks assigned to you in the *Tasks* dashlet.
3. Click on the link with the invitation task and in the displayed dialog click on the *Accept* button. You will be added as a new site member and the new site will be available in your list of sites in top banner. You can now start to collaborate on the site with other members.

### How to manage user accounts?

If you like to manage user accounts, please use the *Members* link in the navigation bar. Here you can administer people, groups, and invitations.

Note that the user accounts management functionality is reserved for site administrators only.

### How to change your password?

If you like to change your login password, please follow these instructions:

1. Click on the link with your name in the top-right side of the page.
2. In the displayed menu, click on the *Change Password* link.
3. Type your old password; enter your new password and re-enter new password for confirmation. To change the password to new one, click on *OK* button, to cancel the operation without the changing of the password, click on *Cancel* button.

### How to customize the collaboration site?

As the site manager you can customize site configuration such as the visual theme and available Site pages. To customize site configuration, please follow these steps:

1. Navigate to the site dashboard (e.g. click on site link in the *Sites* menu).
2. Click on *More* button on the right-top side of the page and select *Customize Site* menu. On the displayed page you can specify visual theme for the site and configure the list of Site pages available for the collaboration. To add new Site page, you can drag the page from the list of available pages and drop it on the list of the current pages. You can optionally rename each Site page or remove it from the current list.
3. To save your configuration changes, click on *OK* button. If you like to cancel all site changes, click on the *Cancel* button.

### How to customize your personal or site dashboard?

As the registered user you can customize your dashboard to better suit your needs and preferences. You can also customize site dashboard for all site members if you have the site manager access rights. To customize personal or site dashboard, please follow these steps:

1. Navigate to the site or personal dashboard (click on the site link in the *Sites* menu or click on *My Dashboard* button in top banner).
2. Click on *Customize Dashboard* button in the top-right side of the page. On the displayed page you can change the layout which defines how the dashlets will be organized on the dashboard page.
3. To add new dashlet, please click on *Add Dashlets* button and use drag and drop mouse operation to select dashlet and place it on the dashboard layout.
4. You can remove dashlet from the dashboard by dragging the dashlet from the dashboard layout and dropping it on the trash icon.
5. To save your configuration changes, click on *OK* button. If you like to cancel all dashboard changes, click on the *Cancel* button.

### How to change language of the Alfresco site environment?

Alfresco Share inherits the language settings from locale settings of the web browser. So to change the language of the Alfresco site environment, first change the language settings in your web browser and then reload the application there. If the Alfresco installation supports the selected language (i.e. proper localisation bundle is installed on the server), the Alfresco site environment will be displayed in the selected language.

Note: Installation of a new language bundle needs to be done by the Alfresco administrator only.

# 3. USE OF THE COLLABORATION AND SCENARIO EDITING TOOLS

The following sections contain descriptions and instructions on how to perform the most common operations of the *Collaboration* and *Scenario Generation* tools. Operations are grouped according to the site components.

## 3.1. WIKI

### How to edit wiki pages?

When editing wiki pages, please follow these steps:

1. Navigate to the wiki page you like to edit (e.g. using the *Wiki* and *Wiki Page List* links or search facilities).
2. Click on the *Edit page* link next to the wiki page. The content of the selected wiki page displays in the wiki HTML editor.
3. Do the editing operations. Help for the editor is available after clicking the icon, as well as at http://www.tinymce.com - home page of the built-in TinyMCE editor (TinyMCE, 2012).
4. If you wish to end editing and save the changes, click on *Save* button. If you wish to cancel editing without saving, click on *Cancel* button.

Wiki page editor allows you to see all pending changes of the page content, as they will be finally presented. During the editing you can change the size or font attributes and the colour of text characters. It is also possible to insert into text numbered and unnumbered lists, images, links and tables. If you like to insert into the text a link to the document uploaded in the Document Library, please use the *Document Link* icon. An overview of the most used buttons in the editor toolbar is presented in Table 2:

**Table 2:** Wiki page editor - list of the most used command buttons.

| | |
|---|---|
| | Change font to bold, italics, underline or strikethrough. |
| | Change text alignment to the left, center, right or into the block. |
| | Insert numbered and unnumbered lists. |
| | Insert link or edit link location. When you click on the button, you can type the link address into the displayed form. |
| | Insert the table into the page. When you click on the button, you can specify number of rows and columns in the displayed form. |

### How to find a desired wiki page?

If you wish to display particular page, please follow these steps:

1. Click on the *Wiki* link in the site navigation bar. The main wiki page will be displayed.
2. Click on the *Wiki Page List*. The list of all wiki pages will be displayed. In the list, navigate to the desired page and click on the page name link. You can filter the list of pages with the filter links on the left hand part of the page. You can display all pages (default option), recently modified, recently added or your pages.

### How to work with wiki page versions?

If you change the content of the wiki page, the new version of the page is always created. Anytime you can then revert the page to its previous versions and restore the previous content. To work with the wiki page versions, please follow these steps:

1. Navigate to the page you like to work with (using the *Wiki Page List* link).
2. Click on the *Details* link located next to the required wiki page. The page with details is displayed. In the bottom part you can see the *Version history*.
3. If you like to revert the content of the page to the previous version, click on the selected version to expand description and click on *Revert*.

### How to comment on the wiki page or react to the comments?

If you like to comment the content of some wiki page or if you like to join the discussion and send your answers to the comments, please follow these steps:

1. Navigate to the page you like to read and comment on. To navigate to the selected page, please follow these instructions above in this section.
2. After the page is displayed, below the content, you can see the list of comments. If you like to add new comment, click on *Add comment* button. In the displayed form, you can type the text of the comment. When you finish text editing, click again on the *Add comment* button. If you like to cancel editing without the saving, click on the *Cancel* button.

### How to insert charts for data visualization?

You can visualize a sequence or structure of numerical data with the charts inserted into the Wiki pages. If you like to insert a new chart, please follow these steps:

1. Navigate to the page you like to edit. To navigate to the selected page, please follow the instructions above in this section.
2. Click on the link *Edit page*. The content of the selected wiki page displays in editor, as it is depicted in Figure 5.
3. If you wish to add a new chart, click on icon in the wiki HTML editor menu.
4. In the displayed dialog (see in Figure 5), you can specify the title, height/width dimensions (in pixels), and source data - labels of columns and a data table in the format supported by the *Google Visualization API* (Google Visualization API Reference, 2012).
5. Specify a desired type of the chart, using the *Type* combo box. You can select from several available chart types such as Pie, Scatter, Geo, Line, Column, Area chart, Treemap or Table.
6. Confirm the operation by clicking on *Insert* button. The chart will be included into the wiki page text, represented by the icon in the "edit" mode.
7. Click *Save* to confirm changes made in the editor. The updated wiki page, which is displayed afterwards, contains the specified chart visualised in a web browser.

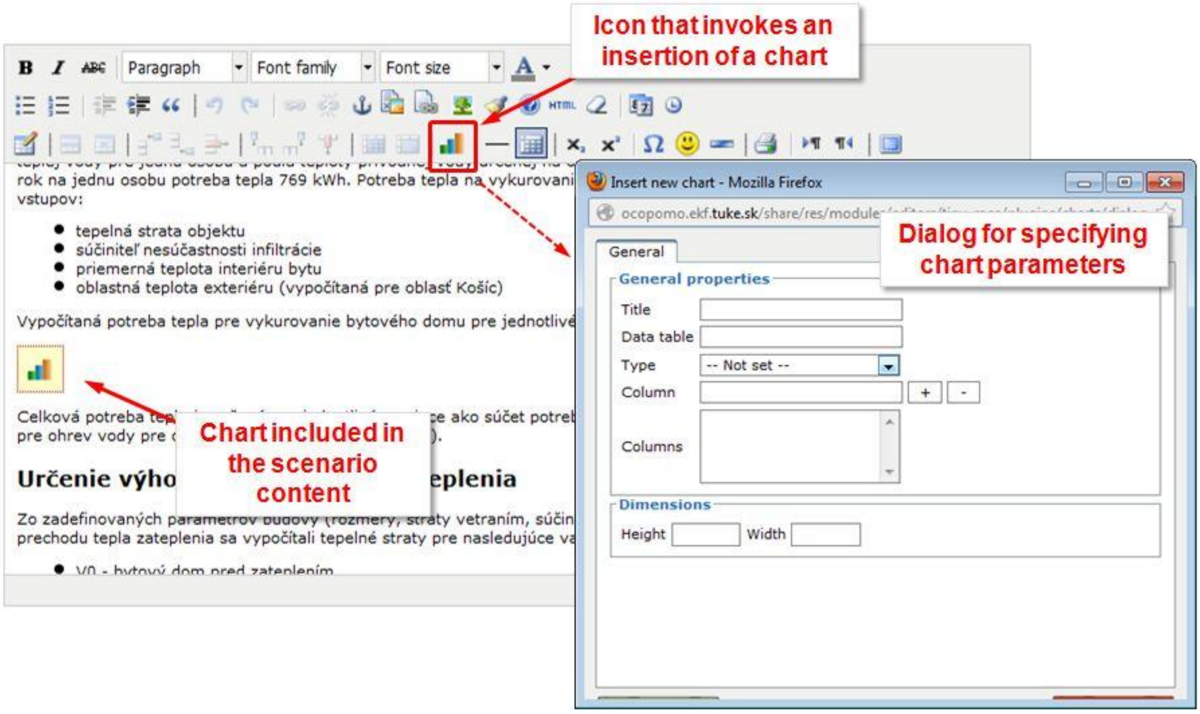



**Figure 5:** Inserting a chart into the content of a scenario wiki page.

## How to modify an existing chart included in the scenario wiki text?

Unfortunately, this functionality is not supported in the current version of OCOPOMO *Scenario Generation Tools* and *Collaboration Tools*. To modify an existing chart, you need to remove it from the wiki content by using the *Edit page* link, and then removing the icon which represents the chart in the wiki text editor. After that, a new chart with required parameters can be inserted. To perform all these operations, please follow the steps:

1. Navigate to the page you like to modify a chart. To navigate to the selected page, please follow the instructions above in this section.
2. Click on the link *Edit page*. The content of the selected wiki page displays in editor.
3. Inside the editable text, navigate to the icon which represents the chart in the wiki text editor. Select the icon and press *Del* button to remove the chart.
4. If you wish then to add a new chart, click on icon in the wiki HTML editor menu. Specify the chart properties in the displayed dialog and confirm the operation by clicking on *Insert* button.
5. Click *Save* to confirm changes made in the editor. The updated wiki page, which is displayed afterwards, contains the specified chart visualised in a web browser.

## 3.2. DOCUMENT LIBRARY

### How to upload a file document into the Document Library?

Documents are stored in the Document Library in folders, similarly like files are stored on the disk of your computer. If you like to upload new document and store it in the Document Library, please follow these steps:

1. Switch to Document Library (click on the *Document Library* link in the site navigation bar).
2. Navigate to the folder into which you like to upload your documents.
3. Click on the *Upload* button. In the displayed form, you can select multiple files from your computer, which will be uploaded into the Document Library. If you select all documents for uploading, click on *Upload files* button. After the uploading, new documents should be displayed in the selected folder. If you like to cancel uploading of files, click on *Cancel* button.

### How to add a link to the document from the Document Library into the wiki page?

If you like to add link to the document from the Document Library into the wiki page, please follow these steps:

1. Navigate to the document, which you would like to link on the wiki page. To navigate to the desired document, please follow these steps.
2. In the right hand part of the view in the *Share* section you can find the link to the document for sharing. Copy this link into the clipboard (for example by typing Ctrl+C command).
3. Navigate to the page into which you like to insert the link to the document and start editing of the page. To find and edit page please follow these steps.
4. Select the text which you like to change to the link and click on button. In the selected dialog, you can type link URL to the document (you can paste the link from the clipboard for example by typing Ctrl+V command). Click on *Insert* button to create a link to the document. If you like to cancel addition of the link, click on the *Cancel* button.

Alternatively, you can add a link from the wiki HTM editor, following these steps:

1. Navigate to the wiki page (e.g. by *Wiki* and *Wiki Page List* links).
2. Click on the *Edit* link next to the wiki page. The wiki HTML editor is displayed.
3. Type and select a text that will be a link to the just uploaded file. Then click on the *Insert Document Link* icon, navigate to the document in the displayed list of Document Library, select the file by clicking on the "+" sign and click OK. The link will appear in the wiki page content.
4. Do not forget to click *Save* to confirm the changes.

### How to find desired document in the Document Library?

If you like to display particular document stored in the Document Library, please follow these steps:

1. Click on the *Document Library* link on the site navigation bar.
2. Documents are stored in the Document Library in folders, similarly like files are stored on the disk of your computer. You can navigate to the folders by clicking on folder name.

3. Find desired document and click on link with its name. On the displayed page you can see the preview of the document content, metadata information and section with the actions links. If you like to download document into your computer, click on *Download* link in *Document actions* section.

**Tip:** To locate a document, you can use the keyword/fulltext search facilities - the query field is located in the right hand side of the upper bar.

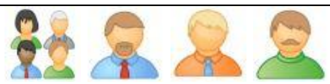
### 3.3. DISCUSSION FORUMS

#### How to find desired discussion topic in the Discussion page?

If you like to display particular discussion topic stored in the Discussions, please follow these steps:

1. Click on the *Discussions* link on the site navigation baer.
2. Find desired discussion topic and click on the link with its name to open it. You can filter the list of topics by clicking on the filter links and select all, only your topics or most active topics.

#### How to create a new discussion topic?

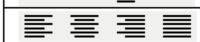
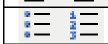
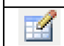


Discussion forums (topics) are available within the Discussion page. If you like to create a new discussion topic, please follow these steps:

1. Switch to *Discussions* (click on *Discussions* link in the site navigation bar).
2. Click on the *New Topic* button. In the displayed form, you need to insert the title of new topic and text of the starting message. You can also add some tags to your topic. To save the topic click on *Save* button. After the saving, new topic should be displayed within the Discussions page. If you like to cancel creation of discussion topic, click on *Cancel* button.

Editor for creation of text in messages within the topic allows you to see all pending changes of the message content, as they will be finally presented. During the editing you can change size, font, attributes and colour of text characters. Also it is possible to insert into text numbered and unnumbered lists, images, links and tables. If you like to insert into the text a link to the document uploaded in the Document Library, or do some other actions with text, please follow instructions in the following Table 3, where you can find the overview of most used buttons in the editor toolbar:

Table 3: **Discussion topic editor - list of the most used command buttons.**

| | |
|---|---|
| **B** *I* U ~~ABC~~ | Change font to bold, italics, underline or strikethrough. |
|  | Change text alignment to the left, center, right or into the block. |
|  | Insert numbered and unnumbered lists. |
|  | Insert link or edit link location. When you click on the button, you can type the link address into the displayed form. |
|  | Insert the table into the message. When you click on the button, you can specify number of rows and columns in the displayed form. |

### How to post a new message to the topic?

If you like to post a new message to the discussion topic, please follow these steps:

1. If the desired topic is not currently open, navigate to the topic using *Discussion* page navigation panel, to which you like to post. Then click on link with the name of this topic to open it.
2. Now you can see your desired discussion topic. For replying to any message there, click on *Reply* link shown at the right part of the message to answer the particular message. You will see the same editor (as for creation of starting message), which is used for inserting of your reply. To finishing the reply click on *Create* button. New message is then shown on its place according to position of original message within the discussion hierarchy.

### How to add a link to the document from the Document Library into the message within the discussion topic?

If you like to add a link to the document from the Document Library into the message within the discussion topic, please follow these steps:

1. Navigate to the document, which you like to link in the discussion topic. To navigate to the desired document, please follow these steps.
2. In the right hand part of the view in the *Share* section you can find the link to the document for sharing. Copy this link into the clipboard (for example by typing Ctrl+C command).
3. Navigate to the discussion topic page into which you like to insert the link to the document and start editing the message (or create a new one) within the topic.
4. Select the text which you like to change to the link and click on button. In the selected dialog, you can type link URL to the document (you can paste the link from the clipboard for example by typing Ctrl+V command). Click on *Insert* button to create a link to the document. If you like to cancel addition of the link, click on the *Cancel* button.

## 3.4. CHAT

### How to start chatting with other collaborators on the site?

Chat dashlet is a component that allows online chatting with other users on the collaboration site. If you like to create a new chat, please follow these steps:

1. Click on the *Site Dashboard* link on the site navigation bar.
2. On the dashboard page, find *Chat* dashlet (Note that dashboard page can be configured by site administrator, so *Chat* dashlet can be not visible on your site. Please contact your site administrator to enable this function). Default view displays the list of all collaborators from the site. Find a collaborator for chatting and click on the link with his/her name.
3. In the displayed view you can type your message and see the conversation. If you like to quit chat conversation, click on the *All Chats* or *Recent Chats* menu button and then on the *Close* link. If you like to add new users to the current chat, click on *Add to chat* link. In the displayed form you can select the new chat participant(s).

### How to save the chat history as a document in the Document Library?

If you like to save the currently active/open conversation as a document in the Document Library, please follow these steps:

1. If the desired chat is not currently open, navigate to the chat conversation, which you like to save. Click on the *All Chats* links and list the desired chat.
2. Click on *Publish* link. In the displayed form specify the name of the document. To publish the chat history click on *Submit* button. New document with the chat history will be visible in the *Chats* folder in the Document library.

### How to create a discussion topic from the current chat?

If you like to create a new discussion topic (in *Discussions* page) related to the current conversation, please follow these steps:

1. If the desired chat is not currently open, navigate to the chat conversation, which you like to save. Click on the *All Chats* links and list the desired chat.
2. Click on *Create Discussion* link. In the displayed form specify the name of the topic and text for the first message within the topic. To create the discussion topic click on *Submit* button. New discussion topic to current chat is then visible within the Discussions page.

## 3.5. POLLINGS

### How to create a new polling?

Pollings page component can be used to manage questionnaires and opinion pollings. If you like to create a new polling, please follow these steps:

1. Click on the *Pollings* link on the site navigation bar. The list of existing pollings on your collaboration site will be displayed.
2. Click on *New Polling* button. In the displayed form specify short title and description. Optionally you can assign arbitrary tags to organize your pollings.
3. Click on *Add* button and add one or more questions. In the displayed form specify the question text and select the type of the question from the drop box. Questions can be of type with yes/no answers, one from many enumerated answers and many from many enumerated answers. For enumerated answers, type the answer text and click on *Add* button next to the answer input line to add new answer. To finally add question, click on *Add* button on the bottom of the form, or click *Cancel* button to cancel operation. After you will add all questions, click on *Save* button to save your changes and create a new polling.

### How to answer the polling and see the polling results?

If you like to answer the questions of the desired polling, please follow these steps:

1. Switch to *Pollings* (click on *Pollings* link in the site navigation bar).
2. In the displayed list of pollings, find desired polling and click on the link with its title. The form with the polling questions will be displayed. Answer all required questions and click on *Submit* button. If you like to cancel submission of answers, click on *Cancel* button. You can

filter the list of pollings with the filter links on the left hand part of the page. You can display all pollings (default option), pollings created by you and recently added pollings.

3. To view the result, navigate to the desired polling in the list and click on *View results* action link, which will be displayed when you will point over the polling row. In the displayed form you can see the number of total posts and distribution of answers for each question. To close the result view and switch back to the list of pollings, click on the *Close* button.

### 3.6. CALENDAR

## How to create a new calendar event?

Calendar events are available within the *Calendar* page. If you like to create a new discussion topic, please follow these steps:

1. Switch to Calendar (click on *Calendar* link in the site navigation bar).
2. Navigate to the day of your choice, to which you want to add a calendar event. This step can be ignored, if you will use general *Add Event* link, which allows the user to create an event without clicking on a specific date.
3. Click on a specific date to open the form for adding the event. In the displayed form, you need to insert the details of event (what, where, description, time details). You can also add some tags to your calendar event. To save the event click on *OK* button. After the saving, new calendar event should be displayed within the Calendar page. If you like to cancel the creation of calendar event, click on *Cancel* button.

## 4. CONCLUSION

This manual is a comprehensive documentation to the OCOPOMO Collaboration and Scenario Editing Tools. It describes common tasks for end users (policy decision makers, stakeholders, and facilitators) collaborating on the development of policy scenario alternatives within the first phase of the OCOPOMO process.

Since the implementation of the Collaboration and Scenario Editing Tools is based on the Alfresco Share platform, more information on the use of this platform can be found in (Alfresco Share Documentation, 2012) as well as on the Discussion Forum space of the community of Alfresco users and developers, located at https://forums.alfresco.com.

Within the OCOPOMO project, the Collaboration and Scenario Editing Tools were implemented and deployed on the server running at the http://ocopomo.ekf.tuke.sk/share/ address. Three OCOPOMO pilot applications, which can be seen as reference implementations of the tools, were launched and are accessible on the following links:

- Košice Self-governing Region policy case, http://ocopomo.ekf.tuke.sk/share/page/site/kosice/dashboard (content mostly in Slovak language);
- Campania policy case, http://ocopomo.ekf.tuke.sk/share/page/site/campania/dashboard (content mostly in Italian language);
- London housing policy case, http://ocopomo.ekf.tuke.sk/share/page/site/london/dashboard (content in English).

Further information resources:

- Methodology guidelines, OCOPOMO deliverable D8.1 (Scherer et al, 2013);
- Architecture and functionality description, OCOPOMO deliverable D2.1 (Mach et al, 2010);
- other public deliverables of the OCOPOMO project, available at http://www.ocopomo.eu.

Technical support on the presented tools can be provided upon request. To obtain such a support, please contact the coordinator of the OCOPOMO project (see contacts at http://www.ocopomo.eu).

## REFERENCES

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