

APAN Required Community Owner Training Outline



For any Owner of an APAN Community: SharePoint or Verint

Approximate run time ~90 minutes including a 2-minute screen break

1. Requirements for getting into the Owner training

- a) Have your new community URL ready
 - i) <https://sites.apan.org> (SharePoint) OR <https://community.apan.org> (Verint)
 - I) SharePoint sites used to start with <https://wss.apan.org>. The SharePoint upgrade to 2019 Classic on 28 SEP 23 changed URLs.
- b) Find your email from the ticket system from when you established your community. It will have all the links to relevant policy documents (See “References” at the end of this document):
 - i) Retention policy – 2 years inactive then deleted – with no warning.
 - I) Activity = new or updated content.
 - II) Activity does NOT = adding new members or reading your content.
 - ii) Accounts – 35 days inactive then disabled.
 - I) Disabled = account is in a neutral status until user goes through the EASY self-serve re-enable feature under the Sign In button.
 - iii) CUI designation must be requested.
 - I) APAN is hosted on the Amazon Web Services GovCloud at Impact Level 4, BUT it is REQUIRED that CUI files are only uploaded to a community AFTER CUI designation has been requested and approved by APAN Leadership.
 - II) Any CUI requests need to start with a ticket. That ticket will get you the links to the CUI SOP and the request form.
 - iv) Requests for No Interruption (RNI) from monthly maintenance outages are submitted by ticket.
 - I) APAN is not funded at Mission Critical status, so outages will occur.
 - II) Owners should have a backup plan in case APAN is unavailable or features are disrupted.
- c) Documents to Know:
 - i) **Owner Guidelines:** Owner requirements, security expectations, etc. [APAN Community Owner Guidelines - Resources - Support](#)
 - ii) **User Governance:** File size and storage limits, account management requirements, etc. [APAN Applications - Generalized Governance for End Users - Resources - Support](#)

2. General Guidance for ALL Owners


Owners are responsible for **cybersecurity** on their sites/groups.

- i) Permissions for user access are controlled by the Owners.
- ii) Private vs. Public is controlled by the Owners.

APAN Required Community Owner Training Outline

- l) Public settings will publish your content to the internet where search engines will crawl the content and save a copy. While the setting on APAN can be returned to Private, the published content will be out on the internet forever.
 - (1) **Be very careful with Public settings. Only set your community to Public if you are CERTAIN you are ready to publish your content to the public internet.**
- iii) APAN Staff is available to help the Owners. Users who have problems with access will be redirected to the Owners who must take action to fix issues.
 - l) *“With great power comes great responsibility.” - Spiderman*
- iv) Please respond to emails from APAN Ticket System. Max 3 contacts without response will result in the ticket being closed.

GET HELP!

- v) **Help Desk** support (808) 472-7855 – hours for live help: 0800 – 2000 US Eastern Time
 - l) OR submit a ticket: <https://www.apan.org/APAN/pages/servicenow>
 - (1) A separate ServiceNow account is required for most tasks – separate from your APAN account.
 - (2) Users can report a problem as a guest without an account.
 - (3) CAC access to ServiceNow is an option. CAC **or** Username/password.
- vi) **Daily Webinar** – group Q&A – 12:00noon – 1:00pm US Eastern Time daily
 - l) except not on Tuesdays since we focus on Owner Training
- vii) **SUPPORT PAGE:** <https://community.apan.org/support/> Follow grid icon  in upper right of screen or footer shortcut at bottom to “Support.”
 - I) **Knowledge Base** (articles): <https://community.apan.org/support/w/kb>
 - II) **Resources** (documents): <https://community.apan.org/support/m/info>
 - III) **Training** (APAN University): <https://community.apan.org/support/p/apanu>
 - IV) **News and Updates:** (APAN Support Blog) <https://community.apan.org/support/b/blog>
 - (1) Primary announcement venue for users to learn what’s new on APAN.
 - (2) Subscribe to the blog by clicking the gear icon and selecting “Turn Notifications ON.”

OWNERS ARE RESPONSIBLE FOR USER ACCESS TO SITES & GROUPS

- viii) Managing settings for user access into your site or group is your responsibility.
 - l) APAN Team is available for training and reach back support.
- ix) Owners must notify APAN and remove themselves if they leave their job.
- x) Owners must ensure at least one trained owner is always managing the community.
- xi) Owners can add additional Owners. Best Practice is 3-5 Owners. ALL Owners must fulfill requirements:
 - l) All Owners are required to review [Owner Guidelines](#) and [User Governance](#), sign a [Community Owner Acknowledgement form](#), and [take Owner Training](#).
 - (1) **All owners must upload a signed copy of the Community Owner Acknowledgement (COA) form, one form per Owner, to their own community.**

APAN Required Community Owner Training Outline

User landing page upon login

- xii) User Account KB article: <https://community.apan.org/support/w/kb/19052/2-account-administration>
- xiii) Header buttons
- xiv) User tabs
 - I) Groups vs. Sites (common word for both is “Communities”)
 - (1) **Sites** are communities that are built with Microsoft-SharePoint software
 - (2) **Groups** are communities that are built with Verint-Telligent software (<https://www.verint.com/>)
 - II) Find your community via your user profile. This is the default user process expected by APAN. Other processes, like using bookmarks on APAN or in your web browser, can be used but may produce inconsistent results. *“This is the way.” – Mandalorian*

3. Verint Introduction

- a) Top level Verint article in Knowledge Base: <https://community.apan.org/support/w/kb/19112/3-Verint-groups>
- b) Two menus – blue on right and black on left – Start with blue on right
 - i) Manage Members
 - I) See members of your group
 - II) Filter buttons on right side
 - (1) Pending members (default view) vs. List members
 - (2) Display name (default view) vs. Membership type (Owners float to the top)
 - III) Add members
 - IV) Invite members
 - V) Edit member role
 - ii) Black Menu open
 - I) Manage Group
 - II) Group Options
 - III) Group Privacy – 5 levels available but please only use Public Closed, Private Listed, or Private Unlisted.
 - (1) DO NOT USE Joinless or Public Open. They are available only for specific circumstances under HADR events.

4. SharePoint Introduction

- a) Top level SharePoint article in Knowledge Base: <https://community.apan.org/support/w/kb/19183/4-sharepoint-sites>
- b) Grid Icon in upper right corner – then click on “Site Settings.”
 - i) Site Permissions
 - I) Three default user groups: Owners, Members, Visitors

APAN Required Community Owner Training Outline

- (1) Visitors do not see the site show up on their APAN User Profile. All others do.
- II) Add users to an existing user group.
- III) Create a new user group.
- IV) Inheritance
- V) Allow access requests.
 - (1) Check/edit email for sending requests.
- VI) “Everyone” or “All Users” DO NOT USE! It’s the setting that allows all APAN accounts access to your site. This is only allowed on the Public site collection.
- VII) Permissions can be set per application/page the same way.

5. Adobe Connect Introduction

- a) Adobe Connect article in Knowledge Base:
<https://community.apan.org/support/w/kb/28882/adobe-connect-11-2-2/>
- b) Platform agnostic, but Verint allows for Owner to create own rooms.
- c) Permissions do not synch with group/site
 - i) Add additional hosts via APAN Support ticket
 - ii) Rooms have 4 options for user access
 - I) Default setting - All users may access room as guest; host must approve as users come into the room
 - II) More open – Any user may enter at any time; room is open 24/7 to the public.
 - III) Less open – All APAN users may enter at any time; not recommended.
 - IV) Restricted to specific users; submit a ticket to have the Help Desk add users to the room.
 - iii) Change these settings by opening the room, clicking on the room title, select “Manage Meeting Information” from the pull down menu, and click the tab for “Edit Information.”
- d) Store your files NOT in Adobe Connect but your group/site
- e) Request new rooms via Support Ticket on SharePoint

6. Verint Part 2 – After Owner Training – Customizing your group

(<https://community.apan.org/support/w/kb/19210/group-content-pages-and-widgets/>)

- a) Black Menu – Manage Group Theme
 - i) Edit This Page
 - l) Widgets
 - (1) Click and drag
 - (2) Long list of widgets
 - (a) Knowledge Base article on each widget
<https://community.apan.org/support/w/kb/19219/widget-list/>
 - (3) Install widget by click and drag
 - (4) Individual widget controls
 - (a) Gear icon – configure

APAN Required Community Owner Training Outline

- (b) Format options
- II) Layout toggle
 - (1) Layout options
- ii) Manage Pages
 - I) Build new pages
- b) Manage Group – Subgroups
 - i) Building subgroups
 - ii) Managing permissions – no inheritance

7. SharePoint Part 2 – After Owner Training – Customizing your site

- a) Site Settings
 - i) Title, Description, Icon, and URL settings
<https://community.apan.org/support/w/kb/31344/site-look-and-feel/>
 - ii) Search and offline availability
- b) Edit This Page (<https://community.apan.org/support/w/kb/19203/4-custom-pages-and-web-parts/>)
 - i) Webparts <https://community.apan.org/support/w/kb/34385/adding-and-editing-webparts-or-apps/>

8. Questions?

- a) Submit Tickets for help
 - i) Web form <https://community.apan.org/support/p/contact>
 - ii) Phone hotline 808-472-7855

9. References

- 1) [APAN Community Owner Guidelines - Resources - Support](#)
- 2) [APAN Community Owner Acknowledgement blank form, CAC-enabled - Resources - Support](#)
- 3) [APAN CUI SOP for Community Owners - Resources - Support](#)
- 4) [APAN Community CUI Request blank form, CAC enabled - Resources - Support](#)
- 5) [APAN Overview Slides - Resources - Support](#)
- 6) [APAN Applications - Generalized Governance for End Users - Resources - Support](#)