



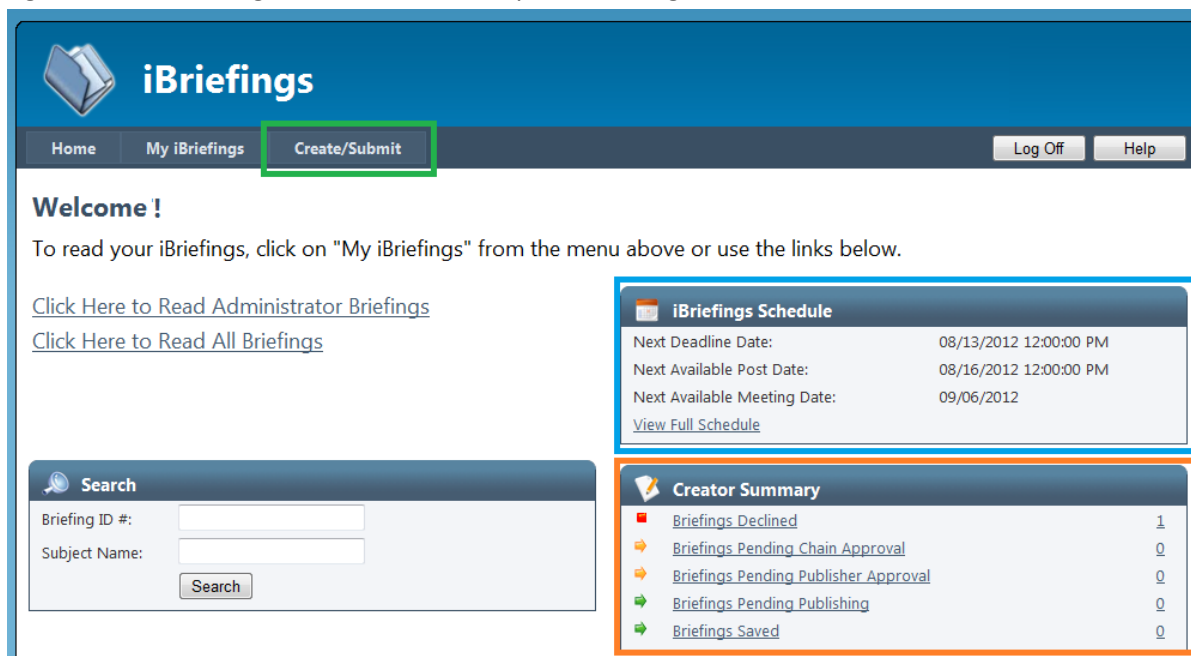
Creator Step-By-Step

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LOGIN AND HOMEPAGE

- 1) Login to the website by direct url <http://ibriefings.collierschools.com> or using the iBriefings shortcut in the District Portal.
- 2) Use your CCPS network credentials (username/password) to login to the login page.
- 3) After logging in you will notice several creator web components on the home page. The top right contains the Log Off button and a Help button for guides and videos.

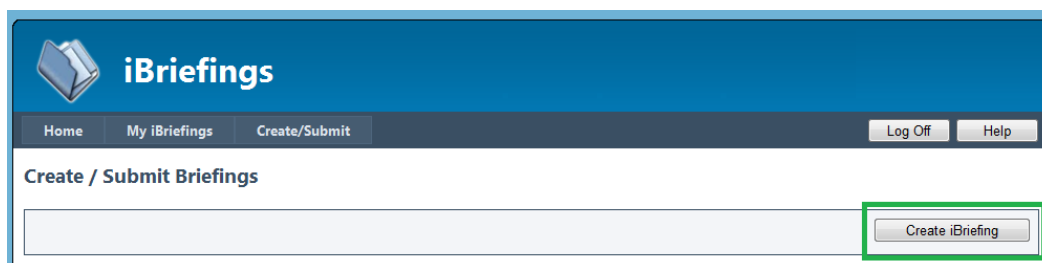


On the navigation bar, there will be a new item “Create/Submit” (highlighted in green). “Create/Submit” menu item will allow you to create and submit iBriefings for approval.

On the home page, the first web component (highlighted in blue) shows the approval schedule for the district. It shows the next available postdate and its required approval deadline date. There is also a link for the “Full Schedule” to look by school year. The second web component (highlighted in orange) shows a brief summary of items in your queue including saved or submitted briefings.

CREATE A BRIEFING

- 1) Let's start the process for creating and submitting a briefing. Click on the "Create/Submit" menu item at the top. You will be sent to the landing page for Creators, now click the Create iBriefing Button on the top Right (Highlighted in Green).

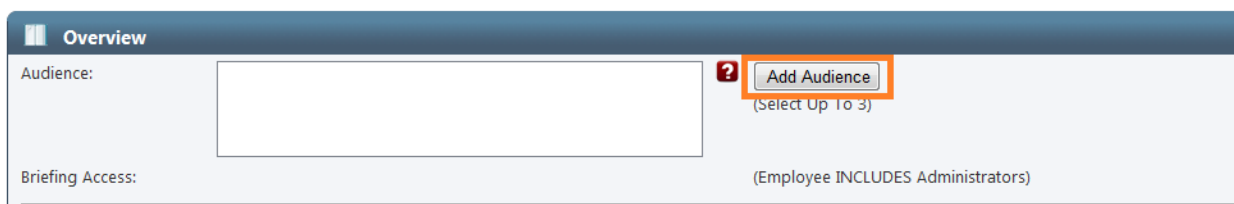


- 2) This will send you to the creation page. To submit a briefing you will need to complete the Overview, Dates, Message, and Contact Information parts of the page. AFTER YOU COMPLETE ALL SECTIONS, you will have to click the save button on the bottom of the page.
- 3) Once you click save you will be redirected to the Create / Submit screen and receive an Message confirming it is saved, IF you do not get redirected your briefing has an error on the bottom of the page that needs to be addressed. You will see this in Step 9.
- 4) Also note the Question marks  after each section, as they popup additional information.

The Audience is a reference to the scope to who the briefing may apply. You may choose up to three audiences. This can be just Administrators, or just Employees, or a combination of both. Example: If you choose to add just Administrator Audiences, you will see the Briefing Access shows Administrator Only. This means only administrators can see this briefing. If you add an Employee Audience, so you have an Administrator and an Employee Audience, the briefing now can be seen by employees and Administrators.

Also if you choose to add just Employee Audiences, you will see Briefing Access shows Employee which also includes Administrators (Administrators are employees).

To add an Audience, click the Add Audience button (Highlighted in Orange).



A popup will appear allowing you to choose the Audience Type (Administrator or Employee) and then the specific Audience. Select an Audience Type (Highlighted in Green) and use the next drop down list to choose your Audience (Highlighted in Blue). Click Add Audience to add it to your briefing. If you want to add more audiences, just repeat the process.

A dialog box titled "Please Select Audience:". It contains a label "Audience Type:" followed by two dropdown menus. The first dropdown menu is set to "ADMINISTRATOR" and is highlighted with a green border. The second dropdown menu is set to "Please Select ..." and is highlighted with a blue border. At the bottom of the dialog are two buttons: "Add Audience" and "Cancel".

If you want to delete an Audience, select the audience in the List and click the Remove Button (Highlighted in Blue). This will remove it from the list.

The "Overview" section of the interface. It shows a list of audiences with "ALL ADMINISTRATORS" highlighted in blue and outlined in red. To the right of the list are two buttons: "Add Audience" and "Remove", with the "Remove" button highlighted in blue. Below the list is a text box for "Briefing Access:" containing the text "ADMINISTRATOR". To the right of this text box is a note: "(Employee INCLUDES Administrators)".

The Priority lists Normal or Urgent. Normal is the default selection and Urgent is only for briefings that must IMMEDIATELY be published. You must email the publisher for Urgent briefings.

The Category lists a few options including District Information and Community Information. District Information pertains to school information and Community Information pertains to community information.

The Subject is a short one liner about the briefing. This is what users will search by and look at to determine if they should read the briefing, limited to 100 characters.

- 5) The Dates consist of Post Date Requested, Due Date, and Meeting Date. Use the calendar icon to the right of the textbox to select your dates.

The "Dates" section of the interface. It contains three rows of date selection fields: "Post Date Requested:", "Due Date:", and "Meeting Date:". Each row has a text input box followed by a calendar icon. To the right of each row is a red question mark icon. At the bottom left is a link "View Schedule". At the bottom right is a red text label "*Post Date Required".

The Post Date Requested states the date you would like your briefing to be posted. Postdates occur each Thursday at noon and must be made through the entire approval process by the prior Monday at noon. The only time you can select a day other than Thursday is if you use an Urgent briefing.

The Due Date states the date you require the reader to return/submit information required by the briefing. An example would be a questionnaire that needs to be filled out. The minimum Due Date that can be selected is 3 weeks after the selected post date.

The Meeting Date states the date you are holding a meeting for the briefing being posted.

- 6) The Message consists of the Purpose and the Briefing part of the briefing. Each is limited to specified number of characters. The briefing must be BULLETED.

The screenshot shows a web form titled "Message". It has two main input areas. The first is labeled "Purpose:" and has a character count of "(250 Chars Max) Remaining: 250" and a red asterisk indicating it is required. The second is labeled "Briefing: (2000 Chars Max) (Bulleted/Numbered Only)" and has a character count of "(2000 Chars Max) (Bulleted/Numbered Only)" and a red asterisk indicating it is required. A "Check Count Now" button is located next to the Briefing section, with a character count of "Character Count: 0 Remaining: 2000".

The Purpose is a two-liner reason for the briefing. This is limited to 250 characters.

The Briefing is a BULLETED body of the briefing. This is limited to 2000 characters. The Check Count Now Button next to the Briefing will check the current count of characters.

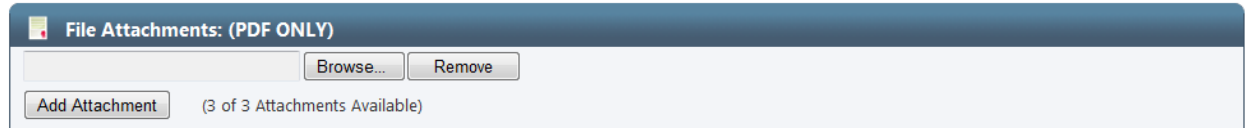
- 7) The Contact Information consists of the Name and contact information (Contact point for the briefing) and the Cabinet Bureau. Use the Address Book Search (highlighted in green) to select someone from the company directory.

The screenshot shows a web form titled "Contact Information". It has a green box around the "Address Book Search" button. Below this are four input fields: "Name:", "Phone: (Ex: 1234567890)", "Email:", and "Cabinet Bureau:". The "Cabinet Bureau:" field is a dropdown menu with "Please Select ..." as the current selection. There are red asterisks indicating that the Name, Phone, and Cabinet Bureau fields are required.

The Name, Phone, and Email are the basic contact information for the point contact of the briefing.

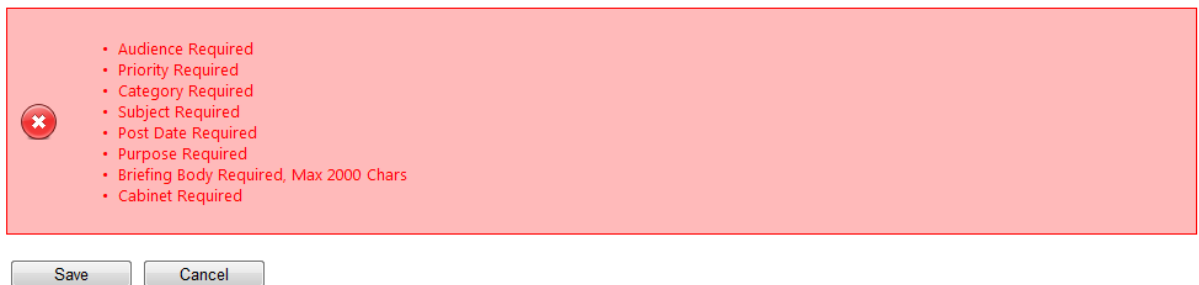
The Cabinet Bureau is the department of which the briefing regards to.

- 8) The Attachments consist of optional attachments that can be submitted with the briefing. Users will be able to download them when viewing the briefing. These MUST be in PDF, and if there is an error when Saving you will need to reselect the file. To add an attachment, click the Add Attachment Button and then click the Browse button to select your file. Repeat this to add up to 3 attachments.



The image shows a dialog box titled "File Attachments: (PDF ONLY)". It has a text input field, a "Browse..." button, and a "Remove" button. Below the input field is an "Add Attachment" button and a status indicator "(3 of 3 Attachments Available)".

- 9) After you have completed all necessary information, click on the "Save" button. If there is no Error you will be redirected to the Create/Submit screen and receive confirmation your briefing is saved (Please note you have to submit for approval shown in the next section). IF there is an error, you will remain on the same page and the error will be shown in a red box on the bottom of the page, correct these items. IF you had attachments re-verify they are still in the File Attachments box. After this is done click the Save button again.



The image shows a red error message box with a red 'X' icon. It contains a list of required fields:

- Audience Required
- Priority Required
- Category Required
- Subject Required
- Post Date Required
- Purpose Required
- Briefing Body Required, Max 2000 Chars
- Cabinet Required

Below the list are two buttons: "Save" and "Cancel".

SUBMIT A BRIEFING

- 1) After creating a briefing, you will be redirected to your Create/Submit page. You can alternately get to this page again by clicking the Create/Submit menu item on the top of the page. There are several areas on this page color coded by briefing status. The Required Action (Red) will contain any briefings that require your approval or saved briefings that need to be submitted for approval. The Pending Approval (Orange) will contain any briefings that are pending chain approval or pending publisher approval. The Pending Post (Green) will contain any briefings that have completed the approval process and are pending the post date to be posted for viewing.
- 2) To Submit a saved briefing, click on the submit button (highlighted in blue) next to the briefing you would like to send for approval.

My Saved / Declined (0)				
Saved:				
ID	Category	Approval Deadline	Subject	Action
535	Administrators	08/27/2012	Test Schedule	  
Declined:				
No Action Required.				

- 3) Next use the drop down list (highlighted in blue) to select the appropriate approval chain. The approval chain members will be populated next to the drop down list. Use the Submit for Approval button (highlighted in orange) to submit the briefing.

 **Approval Chain**

270 - SECONDARY PROGRAMS

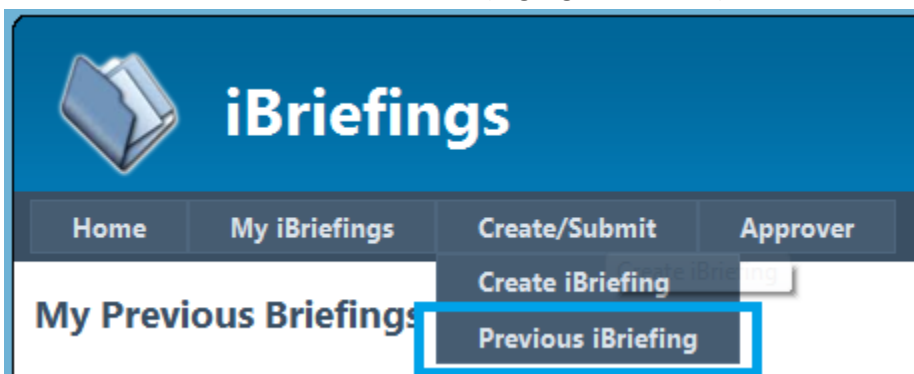
Approval Verification		
Approval Order	Approver Name	Out of Office (True = Bypass)
1	SUSAN MCNALLY	False
2	SARA FENNESSEY	False
3	BETH THOMPSON	False
Submit for Approval		Cancel

- 4) The briefing is now submitted for approval and must be approved by each approval chain member. You will be redirected to the Create/Submit page again and you will see the current status in the Pending Approval (Orange) section on the Submit/Approve page.

My Pending Approval (0)				
Pending Chain Approval:				
ID	Category	Deadline Date	Subject	Current Approver
535	Administrators	08/27/2012	Test Schedule	BRETT REYNOLDS 
Pending Publisher Approval:				
No Action Required.				

REVISE A BRIEFING

- 1) To revise a previously posted briefing, use the navigation menu to select “Previous iBriefings” under the “Create/Submit” menu item. (Highlighted in Blue)



- 2) Next find the briefing that you want to revise and click on the revise option to the right of the briefing. You will only be able to revise briefings that you have created and have been posted.

Previous Briefings(0)				
ID	Category	Date Posted	Subject	
442	Administrators	05/23/2012	Strategic Plan Survey for Non-Administrative Staff	View Revise Report
443	Administrators	05/23/2012	Strategic Plan Survey for All Instructional Staff	View Revise Report
424	Administrators	05/17/2012	5th Grade Student Survey for District Strategic Plan	View Revise Report
425	Administrators	05/17/2012	Student Survey for District Strategic Plan - Middle & High Schools	View Revise Report

- 3) This will take you to the New Briefings page and pre-fill in the information from the last briefing. When you edit the Message – Briefing, you MUST Strike ~~OUT~~ old text and Highlight **New Text**. If you had any attachments you will need to re-attach them to this new briefing. When you have corrected/filled out all fields, use the Save button and follow the approval process.