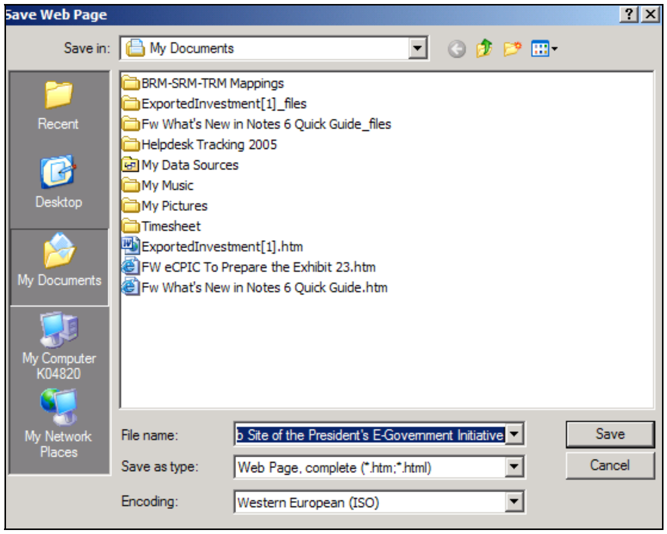


7. Select the location that to save the file and Name the file.

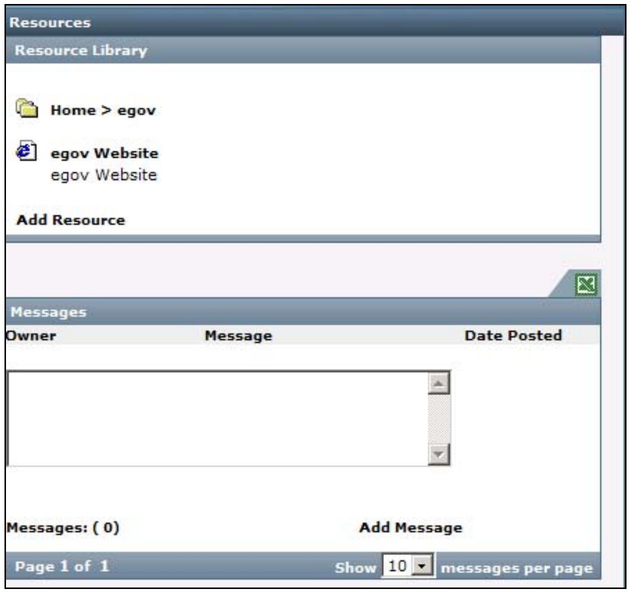
8. Click **Save** to save the document.

5.11.2 Add Portfolio Resource

If users have 'Create' RIGHTS for the Resource Library, they will be able to add Resources to the Portfolio Resource Library.

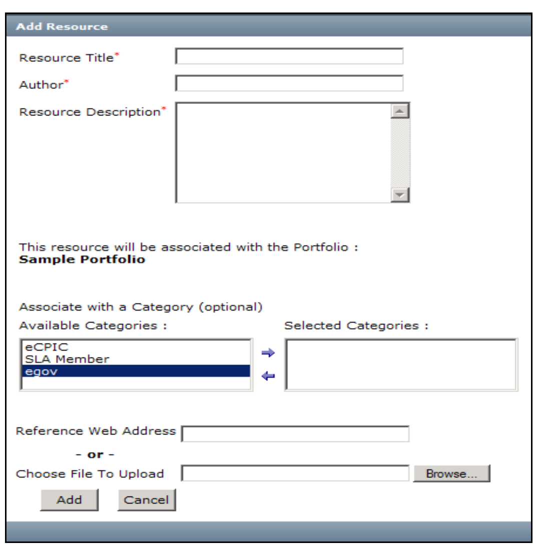
1. From within the portfolio for which users would like to add a resource, click on the **Toggle Resource List** icon ( ). The Resource List icon will appear on the side of the portfolio. There will also be an 508 icon.

2. Mouse over either icon to view the Resource Library and a Messages box to show the Resource Library and Investment Messages. The Resource Library window contains a list of Resources that relate specifically to the portfolio.



Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window where they would like it, they release the click from the icon. ***Click on the icon or outside the box to close the pop-up window.*** **If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position.** ***Click on the 508 icon again to close the window.*** **This will show both the Resource Library and 508 icons once again.**

3. In the Resource Library window, click **Add Resource**. The Add Resource form will appear:



4. In the Add Resource form, enter the Title, Author, and Description.

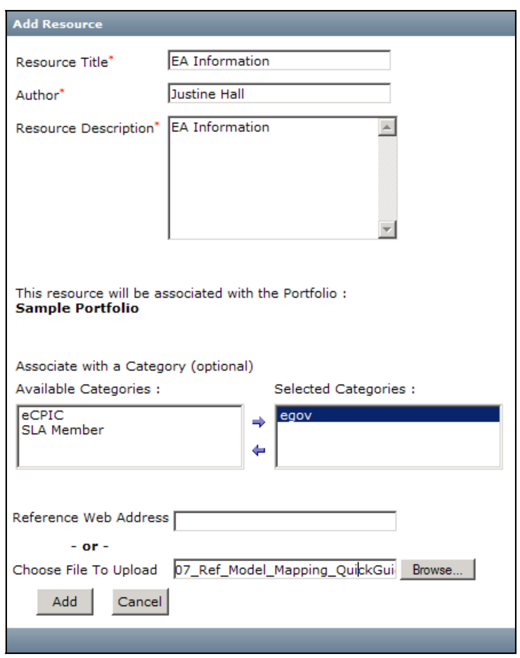
5. If there are Resources Categories available, users will see them listed in the 'Available Category' box. Users can associate the Resource with a category by highlighting the specific category and clicking the arrow to move it to the 'Selected Category' box.

To remove a category from the 'Selected Category', highlight the category and click on the arrow to move it back in the 'Available Category' box.

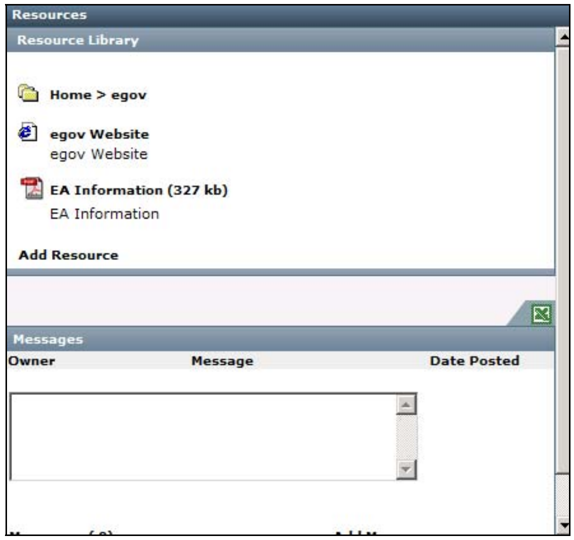
Note: Holding 'Shift' while selecting categories will highlight multiple categories at one time in the order which they are listed. Holding 'Ctrl' while selecting names, will allow users to highlight a category and select other categories that may not be in order.

6. If adding a Web link, enter the address in the 'Reference Web Address' field. (*Don't forget to add the http:// to the beginning of the link*)

7. If adding a document, click **Browse** and navigate to find the appropriate file.



8. After all information is complete, click **Add**. The Resource will now be associated with the portfolio and any Category specified.



5.12 Portfolio Messages

Within any portfolio (assuming the user has access to the Resource Library), they also have the ability to post and delete messages through the **Toggle Resource List** icon ( ). The messages are portfolio specific and will be viewable to all users that have access to the respective portfolio resource library. The intent of the messaging is to allow correspondence about the portfolio to be centralized inside of eCPIC.

5.12.1 Create a Message

To Create a Message:

1. From the Portfolios module, click on the **Portfolio Name** for which users will add a message.

2. Once inside the portfolio, click on the **Toggle Resource List** icon ( ). The Resource List icon will appear on the side of the portfolio. There will also be an 508 icon.

3. Mouse over the Toggle Resource List icon to view the Resource Library and a Messages box.