

Personal Profile

PERSONAL PROFILE

GENERAL

SCREEN

PROXY

PRINTING

PERSONAL PROFILE

The ECM Personal Profile menu option allows the user to set personal preferences. The top of the screen displays the user's E-Auth username, First and Last names, Email Address, Phone number, Mission/Staff, Agency, and Division. The Personal Profile screen is separated into categories. General, Screen, Proxy and Printing.

GENERAL

The Personal Profile screen with the user's General settings displayed is shown in **Figure 1**.

Personal Profile

User Name: 00504050010928410225 **First Name:** ecm
Last Name: usertwenty **Email Address:** kathy.anderson@stl.usda.gov
Phone: 999-999-9999 **Mission/Staff:** Office of the Executive Secretariat
Agency: None **Division:** None

General

General Settings

Notification

Notify me of new assignment's via E-mail messages:

Never No more than once daily
 Every Assignment Only Urgent Assignments

Default Module: Correspondence Management

Default Folder Owner: Main Group

Default Processing Code Group:

User's Groups

Default Group	Name	Organization	Member	Create WF	Administrator	+ Subgroups	As
<input checked="" type="radio"/>	Main Group	OSEC/OES/N...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 1: Personal Profile – General Settings

The General category allows the user to set the notification of new assignments via E-mail. The Default Module, Default Folder Owner, and Default Processing Code Group are set when a user is entered into the system and will not usually be changed by the user.

The Default Module contains a drop down box which displays the modules to which the user has access.

The user can reset their PIN number by clicking the <Reset Pin> button. The PIN number is usually used when an approval on a task is needed. The screen as shown in **Figure 2** can be completed and saved or canceled.

Reset PIN

Current PIN:

New PIN:

Confirm PIN:

Figure 2:Reset PIN

The User's Groups show all the groups of which the user is a member and the users roles within the groups. This information can not be changed by the user.

SCREEN

The Personal Profile screen with the user's Screen preferences is displayed in **Figure 3**.

Personal Profile

User Name:	00504050010928410225	First Name:	eřm
Last Name:	usertwenty	Email Address:	kathy.anderson@stl.usda.gov
Phone:	999-999-9999	Mission/Staff:	Office of the Executive Secretariat
Agency:	None	Division:	None

Screen Preferences

Show Select Group/User Details Screen by Default
 Show More Folder Fields by Default

Show List View Group Navigation by Default
 Show Tree View Group Navigation by Default

Save **Close**

Figure 3: Personal Profile – Screen Preferences

A folder will automatically display the fields as set in the Personal Profile but can be expanded or collapsed by clicking on the <More> or <Less> buttons on the folder as seen in **Figure 4**. This preference can be changed at any time.

Correspondent: 0 [dropdown] [icon] Date on Letter: [text] [icon]
Addressee: 0 [dropdown] [icon] Received Date: 05/23/2006 [icon]
Referrer: 0 [dropdown] [icon] Referrer Due Date: [text] [icon]
Subject: [text] [dropdown] [icon] Related Folders: [text] [dropdown] [Go] [More]

Save **More** ←

Figure 4: Expand Folder Fields

For fields that can be displayed for group navigation purposes such as Mission/Staff, Agency, Division, Group (**Figure 5**), the preference set in the Personal Profile determines how the groups will be displayed when <...> is clicked. The choices are List View (**Figure 6**) and Tree View (**Figure 7**).

Control Number: 4342	Status: Active	Security Level: Limited
Folder Owner:	Processing Code: tstprl	...
Mission/Staff: Office of the Executive Secretariat	Agency: None	...
Division: None	Group: Main Group	...
Action Organization:		
Mission/Staff: Office of the Executive Secretariat	Agency: None	...
Division: None	Group: Main Group	...

Figure 5: Group Navigation

Select Authorized Group/User List View Tree View

Mission/Staff: Office of the Executive Secretariat

Agency: None

Division: None Show Groups/Positions

Parent Groups

None

Groups Positions

Main Group

Correspondence Control Officer

Level Down Level Up

Find Group: Go

Select Group/Position

Users Display

Show Groups for User

Find User: Go

Select User

Cancel

Figure 6: List View



Figure 7: Tree View

The user can toggle between the views by clicking the <Tree View> or <List View> buttons in the top right hand corner of the screens

PROXY

The Proxy screen is used by the user to Add, Remove, or Modify a Proxy and to set the time frame for which the Proxy may act for the user. The Proxy screen with no Proxy set is seen in **Figure 8**.

Personal Profile

User Name:	00504050010928410225	First Name:	ecm
Last Name:	usertwenty	Email Address:	kathy.anderson@stl.usda.gov
Phone:	999-999-9999	Mission/Staff:	Office of the Executive Secretariat
Agency:	None	Division:	None

General

Screen

Proxy

Printing

Proxy Settings

Staff With Your Proxy

Name	From	To	Application	

Proxy Information for Add/Update

Name:

From:

To:

Module:

Figure 8: Proxy Screen

Add a Proxy

To add a Proxy the user clicks the <Select For Add> button. The Find User screen is displayed. The user searches for a Proxy by name or by a string of characters followed by * or within a particular group and clicks <Search>. The results are displayed as shown in **Figure 9**.

Find User

Last Name: First Name:

Mission/Staff: Agency:

Division:

Group:

Last Name	First Name	Mission/Staff	Agency	Division
Userone	FSA	Rural Develo...	None	None
usereight	ecm	Farm and Fo...	Farm Service...	None
usereighteen	ecm	Office of the...	None	None
usereleven	ecm	Farm and Fo...	Farm Service...	None
userfifteen	ecm	Office of the...	None	None
userfive	ecm	Rural Develo...	None	None
userfour	ecm	Rural Develo...	None	None
userfourteen	ecm	Office of the...	None	None
usernine	ecm	Farm and Fo...	Farm Service...	None

Grid Count: 20

Figure 9: Proxy – Results List

The user highlights a user and can click <Show Groups For User> to see the groups in which the selected user resides. When the user has selected a Proxy, she clicks <Select User> and the Proxy is added.

Before the Proxy can be saved, the valid dates for which the Proxy can act must be entered. The 'From Date' may not be before today's date. The user then clicks <Add/Update> and the Proxy is activated.

Additional Proxies can be added by using the same process. All Proxies will be shown in Proxy Settings with the modules and dates within which they can act as seen in **Figure 10**.

Personal Profile

User Name: 00504050010928410225 **First Name:** ecm
Last Name: usertwenty **Email Address:** kathy.anderson@stl.usda.gov
Phone: 999-999-9999 **Mission/Staff:** Office of the Executive Secretariat
Agency: None **Division:** None

General

Screen

Proxy

Printing

Proxy Settings

Staff With Your Proxy				
Name	From	To	Application	
ecm userfifteen	10/02/2006	12/29/2006	Correspondence Management	
ecm usereighteen	09/01/2006	09/29/2006	Correspondence Management	
ecm userfifteen	10/02/2006	12/29/2006	General Use	
ecm userfifteen	10/02/2006	12/29/2006	Content Analysis	

Proxy Information for Add/Update

Name:

From:

To:

Module:

Figure 10: Proxy Settings

Remove a Proxy

A Proxy can be removed by highlighting the individual Proxy on the list and clicking <Remove>.

Select For Update

Proxy information can be updated by highlighting the Proxy and clicking <Select for Update>. The selected Proxy information is displayed . The dates and module become unprotected and can be modified. The changes are saved by clicking <Add/Update>.

PRINTING

The Personal Profile screen with the user's Print settings is displayed in **Figure 11**.

User Name:	00504050010928410225	First Name:	ecm
Last Name:	usertwenty	Email Address:	kathy.anderson@stl.usda.gov
Phone:	999-999-9999	Mission/Staff:	Office of the Executive Secretariat
Agency:	None	Division:	None

General

Screen

Proxy

Printing

Printing Preferences

Default Print Options for: Folders

Documents/Reports to Print:

Folder Cover Sheet Report

Folder Security Report

Documents:

All Document Types Specific Document Type

Document Type

- Final Response
- Incoming
- O/Test
- Incoming Attachment
- Enclosure
- Interim Response
- Miscellaneous
- Outgoing Attachment
- Set Up Folder
- Signed Copy

Document Versions:

Most Recent Version

All Versions

Print Control Number:

List of Documents

Workflow Status

Application Specific Report Clearance Signature Report

Print File Preference (Single Folder):

One File for All Documents/Reports

Individual Files for Each Document/Report

Print File Preference (Multiple Folders):

One File for All Folders

One File for Each Folder

Individual Files for Each Document/Report

Notify Completion via:

Electronic Mail

Workflow Inbox

Browser Window

Save
Close

Figure 11: Personal Profile – Folder Print Settings

It is on this screen that the user sets default settings for both folder and document printing. The screen example in **Figure 11** shows the user's default folder print settings. When the user clicks the Print Folder button with the Quick Print check box selected, the default values specified on this screen are used to immediately submit the print request.

Initially, the following default values will be used for this screen:

Documents/Reports to Print:

- Folder Cover Sheet Report
- Documents
 - o All Document Types
 - o Document Versions – Most Recent Version
- Workflow Status

Print File Preference (Single Folder Selected):

- One File for All Documents/Reports

Print File Preference (Multiple Folders Selected):

- One File for Each Folder

Notify Completion via:

- Workflow Inbox

To toggle between folder and document print settings, the user changes the selection in the “Default Print Options for” drop down list. An example showing the user’s default document print settings is in **Figure 12**.

User Name: 00504050010928410225 **First Name:** ecm
Last Name: usertwenty **Email Address:** kathy.anderson@stl.usda.gov
Phone: 999-999-9999 **Mission/Staff:** Office of the Executive Secretariat
Agency: None **Division:** None

Printing Preferences

Default Print Options for: Documents

Documents to Print:

- All Documents in List
- Selected Document(s) in List

Document Types to Print:

- All Document Types
- Specific Document Type

Document Type
<input type="checkbox"/> Final Response
<input type="checkbox"/> Incoming
<input type="checkbox"/> O/Test
<input type="checkbox"/> Incoming Attachment
<input type="checkbox"/> Enclosure
<input type="checkbox"/> Interim Response
<input type="checkbox"/> Miscellaneous
<input type="checkbox"/> Outgoing Attachment
<input type="checkbox"/> Set Up Folder
<input type="checkbox"/> Signed Copy

Document Versions:

- Most Recent Version
- All Versions

Print Control Number:

Print File Preference:

- One File for All Documents
- Individual Files for Each Document

Notify Completion via:

- Electronic Mail
- Workflow Inbox
- Browser Window

Save **Close**

Figure 12: Personal Profile – Document Print Settings

The user sets default values for all of the options on the Print Documents screen. When the user clicks the Print Documents button with the Quick Print check box selected, the default values specified on this screen are used to immediately submit the print request.

The following default values are currently used for this screen:

Documents to Print:

- Selected Document(s) in List

Document Types to Print:

- All Document Types
- Document Versions – Most Recent Version

Print File Preference:

- Individual Files for Each Document

Notify Completion via:

- Workflow Inbox