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MerLin on SharePoint 2013

An Overview and User Guide

Version 0.0.15.0709

Learning and Development
Participant Reference Guide

Merchant Link Learning and Development

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This manual has been compiled by the Learning and Development department of Merchant Link, LLC. This document is based on proven best practices and provides an overview of the MerLin portal built on SharePoint 2013. This guide includes information on creating and maintaining content and other functions that require special access and permissions to perform. Not all users will be able to access all resources. This guide is in no way intended to be a site-specific or an all-inclusive document.

DO NOT REMOVE THIS PAGE

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Change Log

The following table lists all major changes made to this document. Entries give the date the document was updated, the initials of the person updating the document, and a brief description of the change.

Correction of typographical errors and minor or non-substantive changes to the document are not noted in the change log table.

Date	Changes Made By	Brief Description of Change
09-JUL-2015	CPC	First Draft

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Overview

Introduction

This document provides an overview of the MerLin intranet portal which has been ported to Microsoft's SharePoint 2013 platform.

MerLin has historically existed as a custom-built intranet portal and was created in 2004 for the general use by Merchant Link staff members. The initial goal of this system was to centralize information and to make it more accessible to the general Merchant Link community.

Over time this system has grown to include a number of tools and systems to include a Learning Management System, a Document Management System, several request forms and tools as well as a communications platform.

With changing times has come increased need for a more scalable and standards-based system that can integrate more richly with the various tools we use on a daily basis. Microsoft SharePoint has been a early runner in offering a next-generation solution to our growing needs and opens our ability to develop and deploy solutions for our community.

Transitioning To SharePoint

Changing to the SharePoint platform requires that we maintain MerLin's current functionality and features until better solutions are deployed to replace those tools and features.

Modules built in MerLin such as the Learning Management System (LMS or Passport to Learning) are integrated through IFrame-based pages and other solutions. These tools are tailored to adopt the look and feel of the new SharePoint environment but still access the data stores and resources that have been built over the last 11 years. With few exceptions, all tools and features in the customized version of MerLin are available in MerLin SharePoint. This guide will provide details on any changes to those tools.

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SharePoint 2013 Overview

What is SharePoint?

SharePoint is a web application platform in the Microsoft Office server suite that combines various functions which are traditionally separate applications:

- Intranet
- Extranet
- Content Management
- Document Management
- Personal Cloud
- Enterprise Social Networking
- Enterprise Search
- Business Intelligence
- Workflow Management
- Web Content Management
- Enterprise Application Store

SharePoint Structure

Structural Terms

These terms refer to the structural components of SharePoint.

Term	Description
Site Collection	The site collection is an administrative boundary that groups a number of sites into a single, managed unit. All sites in a site collection *can* share permissions, navigation and branding. In addition, all sites in a site collection *will* begin with the same URL, which is the URL for both the site collection and the top-level site.
Site	A site is a primary unit of administration. It is a container for lists and libraries, and provides the basic unit of administration for collaboration and communication. A site is identified as either a top-level site or a subsite, depending on its relative position within the site collection hierarchy.
Top Level Site	This is the top most site within a site collection. There can be only one top-level site in each site collection as the top-level site shares its URL with the site collection. All other sites in the site collection are subsites.
Subsite	A subsite is a child site within a site collection.
List	A list is a container for content and consists of items. Items are also known as column data.
Library	A library is a special type of list where each item is a file with additional column data.
Page	A page is the main unit of presentation of information. A site can use different customized pages to present information to the users.
Web Part	A web part is a placeholder for content on a page. A web part may bring in data from a number of different sources, based on how the web part is built and configured.
Column	A column is additional information about a piece of data (i.e. date or author) in a list or library, also known as a SharePoint field or metadata.
Metadata	Metadata is additional information or “data about data” beyond the default properties configured in a list or library, also known as a SharePoint field or column.
Content Type	Content type is a reusable collection of metadata (columns), workflow, behavior and other settings for a category of items or documents in a SharePoint list or document library.

Navigating SharePoint

There are a number of navigational elements in SharePoint you should be familiar with. Using these names consistently will help you develop a working vocabulary for support calls or other assistance provided. The following screenshot highlights them:

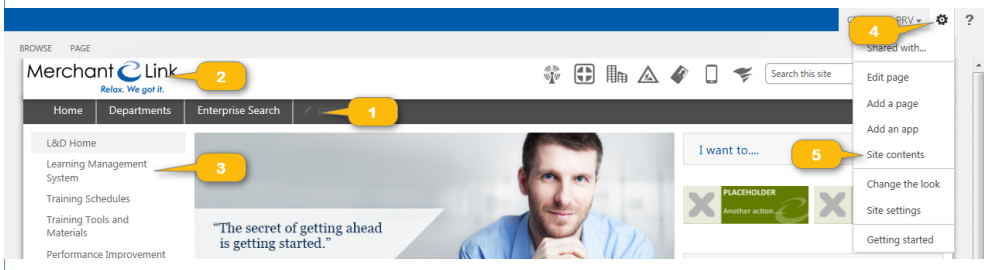


Figure 1 - SharePoint Window Elements

Ribbon Tab	Description
1 - Global Navigation	Also known as the top link bar, global navigation extends across the top of the window. This element *can* be made available throughout the entire site collection, thereby providing a consistent experience for the user regardless of which subsite they may be working in.
2 – Site Logo	Nestled in the top left corner between global navigation and current navigation, the site logo will return a user to the home page of the current site when someone clicks on it.
3 – Current Navigation	Also known as the quick launch, current navigation extends down the left side of the window. The links in current navigation can be customized and are particular to the current site by default.
4 – Settings menu / Gear Wheel	Located in the top right corner of the window, the Settings menu provides a way to add apps and pages as well as to customize the settings for the site.
5 – Site Content Link	Available from current navigation and the Settings menu, Site Contents will display all the apps that are on a site. Although the default behavior of an app is to add a link of itself to current navigation, site administrators may choose to de-clutter current navigation. If so, all the apps can still be accessed from the Site Contents link.

Interacting with the Ribbon

The ribbon is a context-sensitive control across the top of the page, which adapts to the current activity of the user. Different options appear in the ribbon for the user depending on the current focus in the browser. For example, when looking at a Calendar list, the ribbon will present two options: Event and Calendar. However, when looking at a Library, those options will be replaced with Document and Library. The following table outlines some of the different ribbon tabs that users may encounter:

Ribbon Tab	Description
1 - Browse	The **Browse** tab hides the ribbon tools to reveal the global navigation (i.e. top link bar).
2 - Page	The **Page** tab provides tools for managing the pages on a site.
3 – Format Text	The **Format Text** tab is available while editing a page; it provides the basic formatting and page layout tools.
4 - Insert	The **Insert** tab allows objects to be inserted on the page currently being edited.
5 – Web Part	The **Web Part** tab is available when a web part is selected on a page; it gives access to settings for the web part.

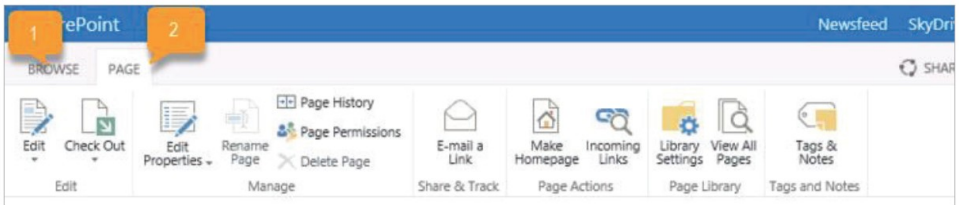


Figure 2 - Ribbon – Page Tab

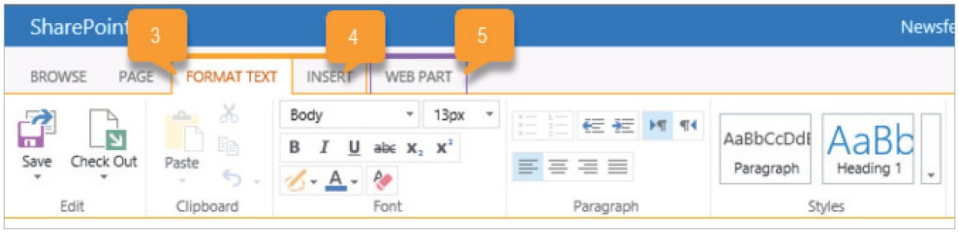


Figure 3 - Ribbon – Page Editing Tabs

Ribbon Tab	Description
6 - Files	Similar to the **Items** tab, the **Files** tab provides additional tools for interacting with documents.
7 - Library	Similar to the **List** tab, the **Library** tab is used for managing the library.
8 - Items	The **Items** tab provides tools for managing the items on a list.
9 - List	The **List** tab provides tools for managing the list itself.
10 - Events	Virtually identical to the **Items** ribbon, the **Events** tab reflects the emphasis on the calendar.
11 - Calendar	Similar to the **List** tab, the **Calendar** tab provides tools for managing the calendar.

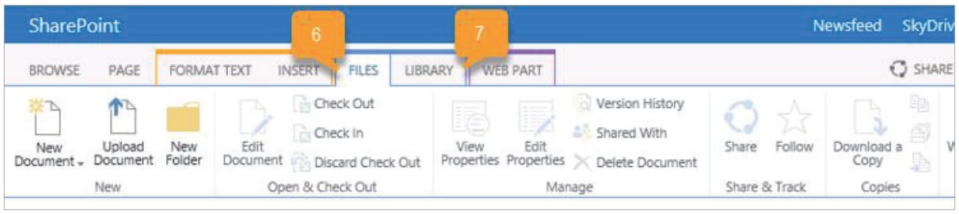


Figure 4 - Ribbon – Library Tabs

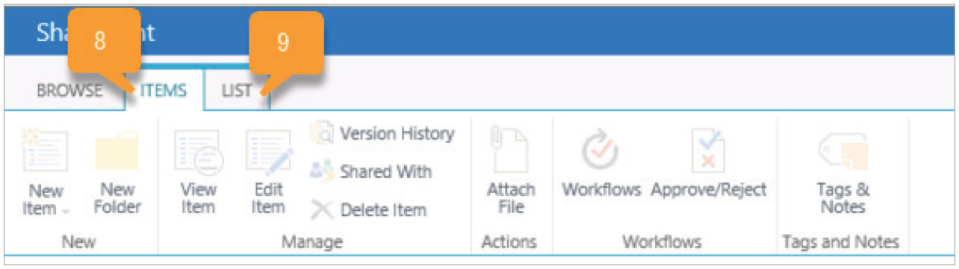


Figure 5 - Ribbon – List Tabs

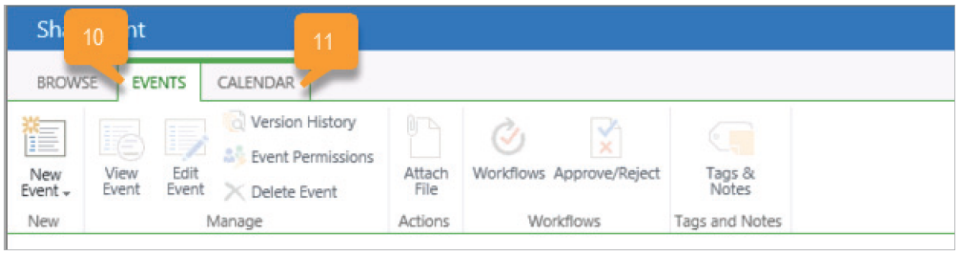
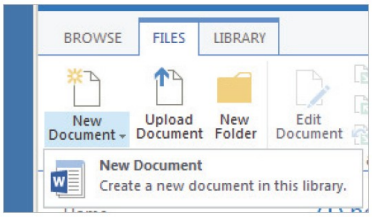


Figure 6 - Ribbon – Calendar Tabs

Creating a New Document from SharePoint

Loading content into SharePoint does require an extra step to upload the file. An alternative option is to create new documents within SharePoint. This approach offers several benefits including the automatic association of the file to the document library upon saving and association of content type columns also known as metadata.
Every list and library has an associated content type. If multiple content types are associated with a particular library, a drop-down menu with multiple options will be available.

1. Navigate to the desired library. Click **Files > New Document > New Document**.



2. Edit the document and click **File > Save As** to save the document back into the originating document library.

> **Note**
> SharePoint offers the ability to define document templates based on strictly defined **Content Types.** Document templates can then be associated with the defined content type.
>
> For instance, if the Business Development Group has a standard contract template, that template can be defined and placed into SharePoint as a new document type. This feature provides the ability to offer a common starting point and better uniformity in the documentation produced by the staff.

Editing a Document from SharePoint

Once files are stored in SharePoint, any changes made to a file opened within SharePoint are saved automatically to the file stored in SharePoint.

1. Navigate to the file to be edited.
2. Click the Open Menu icon to open the document properties window.
3. Click Open to launch the file in the native client application.
4. Author the changes within Microsoft Office and save the file to write the changes back to SharePoint.

OR

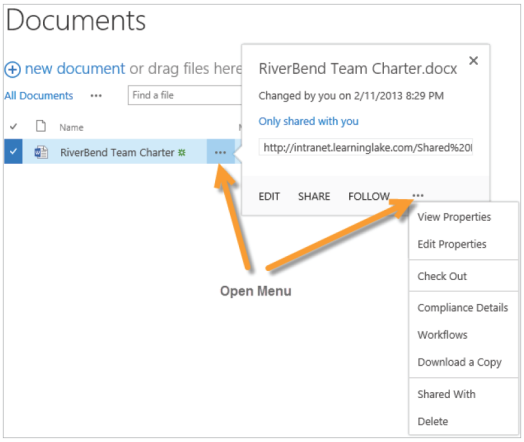
1. Navigate to the file to be edited.
2. Click the file name to open the document in the native client application.
3. Author the changes within Microsoft Office and save the file to write the changes back to SharePoint.

Viewing or Editing Document Properties

Once files are stored in SharePoint, the document properties may need to be added or

adjusted.

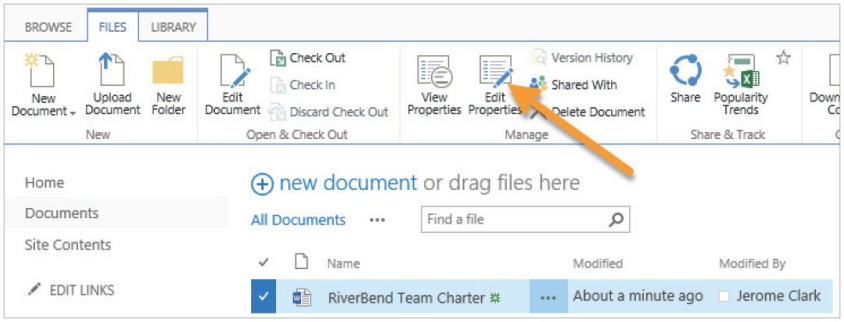
1. Navigate to the file to be edited.
2. Click the Open Menu icon to open the document properties window.
3. Click the next Open Menu icon to expand a secondary menu.
4. Click Edit Properties to see additional information about this file.
5. Click the Save button to update and close the document properties page.



6. Users select the View Properties option from the open menu to view the additional information.

Another way to view or edit document properties is by using the Microsoft ribbon.

1. Navigate to the desired library.
2. Click the checkmark icon next to the file name.
3. Click Files > Edit Properties to launch the same properties window for the selected file.



Users can only view the properties of one document at a time.

SharePoint Roles

Role	Responsibilities and Tasks
Portal / Farm Administrator	Responsible for global portal and WSS configuration, shared services, policies, procedures, and portal vision. • Configuration of SharePoint
Site Collection Administrator	Site Collection Administrators (SCA) have a moderate understanding of how SharePoint works and largely rely on understanding how Site, Lists and Libraries work and be able to manage the content for users. Site Collections are supported by a SCA and issues are routed to them first. SCAs are the first in line of support, user education and administration. This role requires the understanding of the core purpose of the site collection and where to grow it. Responsible for site collection and provisioning of subsites. Responsible for administering and maintaining site • Enforce site standards (layouts, security processes, etc.) • Local contact for local employees • Configuration of SharePoint • Site provisioning • Manage security/permissions for all sub-sites
Site Owner	Site Owners are responsible for one part of a Site Collection only, and cannot change anything on Site Collection level. They have full control on one or more subsites, and can, create lists and subsites, and activate certain site-level features. • Primary and secondary site owner. • Manage the site layout, structure, and content within the collection guidelines and rules • Content creation.
Reader	Readers are the most generalized group. They have little to no editing permissions over content and structure of the Site Collection or subsites. They generally have “read-only” access. In the Site Collection, these users will default to their department-based permissions.

Site Owners

Department	Staff Member – Site Owner Role
Business Development	Emanuel Barnes
Enterprise Security	Jay Konar
Finance and Accounting	
Financial Resolutions	
Human Resources / L&D	Clark Case

Department	Staff Member – Site Owner Role
Implementation	Mesfein Lulseged
Information Technology	
Installation	Mesfein Lulseged
Marketing	Amy Bobitka
Network Operations	Mike Franks
Product Group	
Software Development	
Technical Support	Don Nettleman

QA Testing Members

The following staff members are designated quality assurance testers taking on the role of a standard, non-privileged user.

Department	Staff Member – Reader / Member Role
Business Development	
Enterprise Security	Misael Henriquez
Finance and Accounting	
Financial Resolutions	
Human Resources / L&D	David Whipp
Implementation	Oneka Henry
Information Technology	
Installation	Ryan Allen
Marketing	
Network Operations	
Product Group	

Department	Staff Member – Reader / Member Role
Software Development	
Technical Support	

Creating and Editing Basic Content

The foundation of SharePoint is the ability to organize, store and share all types of content including documents, images and videos. The process of moving that content into SharePoint 2013 varies. This lesson covers moving and creating new content within SharePoint 2013.

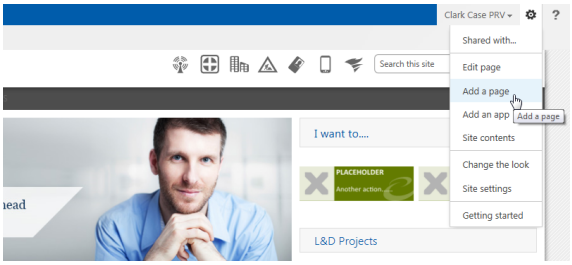
Adding Content to MerLin on SharePoint

There are many ways to add content to a SharePoint 2013 document library. Some of the most common ways include editing or creating new site pages or by uploading documents and files from a local computer or network share browser.

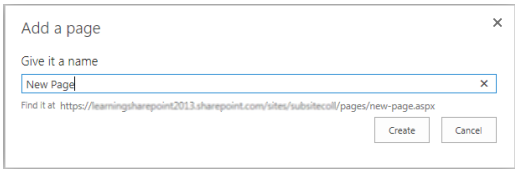
Creating a New Page

Creating new pages for your department site takes a few basic steps:

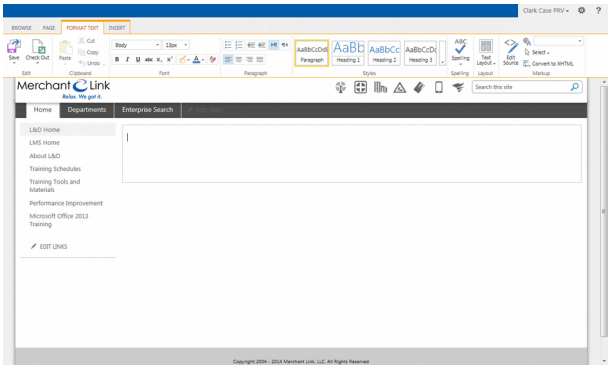
- Navigate to your department site.
- Press the **Site Settings** / **Gear Wheel** button on the SharePoint bar.
- Select **Add a Page** from the menu.



- Enter a new page name in the dialog box.
- Press **Create** to create a new page.



- A new page displays in Edit mode



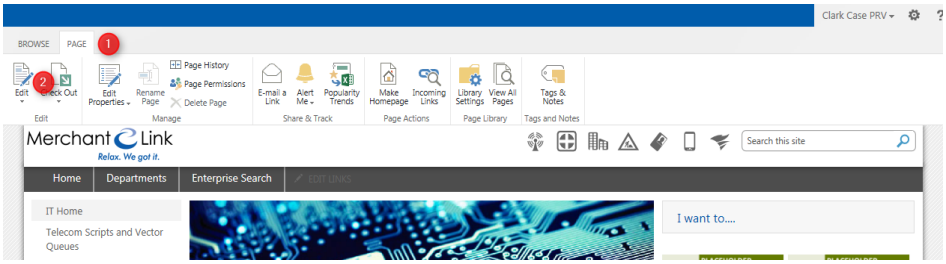
- When you are done making your edits, select the **Page** tab and press the **Save** button.

Editing a Page

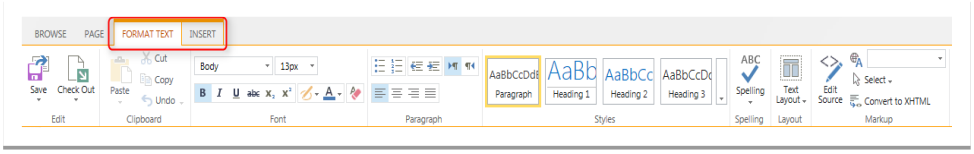
The home page, created as part of a Team Site, is based upon Wiki pages. This gives site administrators the ability to customize the home pages for various team sites. Multiple pages can be created for a site, and stored in the Site Pages library. This allows for the creation of different landing pages for a site. Also, if a site or site collection administrator wants to develop a new home page, the old home page can remain in place until the new one is finished.

To edit an existing page, navigate to the desired page and:

1. Select the **Page** tab on the Ribbon
2. Click **Edit** in the global toolbar.



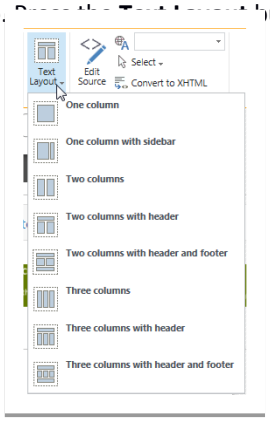
3. Notice the ribbon has two additional tabs, one for text formatting and the other for inserting objects onto the page.



Changing the Layout of the Page

The default layout consists of a header content placeholder with two columns directly below. This layout may work for many sites. However, site owners may determine that this layout does not support the amount of content desired on the home page. The **Text Layout** feature creates different areas on the page to be filled out.

1. Navigate to the desired site.
2. Click the **Edit** button in the global toolbar.
3. Click the **Format Text** tab. Press the **Text Layout** button under the **Layout** section.

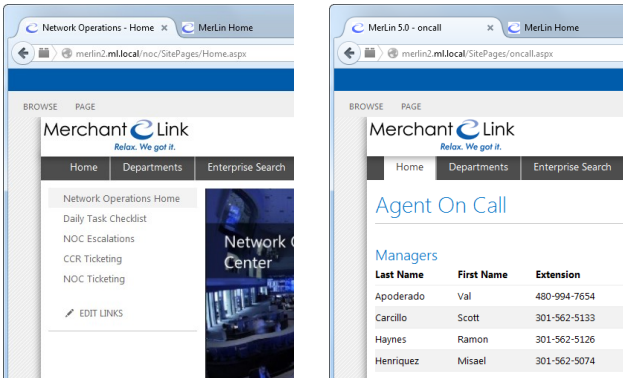


4. Select an alternate layout from the drop-down menu.
5. Notice the page layout updates to include additional columns or rows.

6. Click **Format Text > Save** from the **Edit** group.

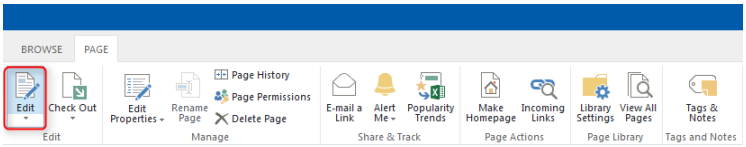
Hiding the SharePoint Quick Links Navigation Panel

The current template in place for MerLin on SharePoint provides files and cascading styles that can further customize a SharePoint page. In some instances, your page design may require that the Quick Links panel be hidden from view:

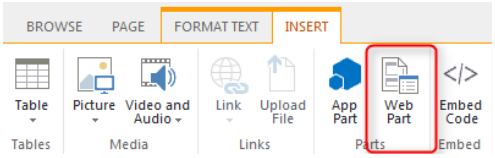


To suppress the Quick Links panel on any give page, perform the following steps:

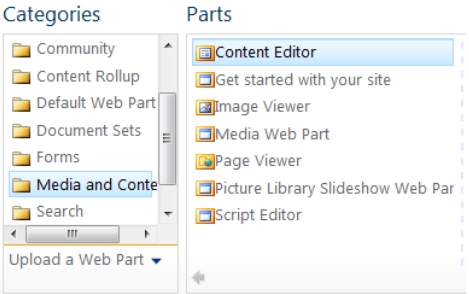
- Navigate to the desired page.
- Select the **Page** tab from the Ribbon. Press the **Edit** button. The page enters edit mode.



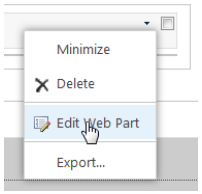
- Place the insertion cursor at the bottom of the page under any content or webparts.
- Select the **Insert** tab from the ribbon and then press the **Web Part** button.



- Select **Media and Content** from the Categories list and then **Content Editor** from the list of Parts.



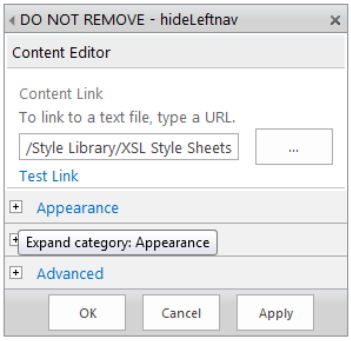
- Once the web part is in place press the dropdown arrow from the far right and select **Edit Web Part** from the context menu that appears.



- Under the **Content Link** section enter the following URL:

  /Style Library/XSL Style Sheets/ml_hideLeftNav.txt.

  Click on the Test Link hyperlink. If the link was correctly typed in, a text file will open in Notepad with some code.



- Expand the **Appearance** section and change the **Title** to something descriptive like "DO NOT REMOVE - hideLeftnav". This will label the web part's title to clearly identify it.
- To prevent the title and web part from showing on the page, scroll to the bottom of the Appearance section and change the **Chrome Type** selection to **None**.
- Press the OK button. The Quick Links navigation panel should now be hidden.
- Select the **Page** tab from the Ribbon and then press the **Save** button to commit the changes.

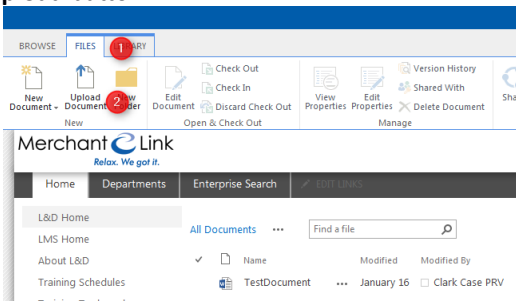
Adding Files to SharePoint

The types of files that can be stored in SharePoint 2013 include, but are not limited to:

- Office documents
- Multimedia files, including images, video and audio
- PDF
- XML

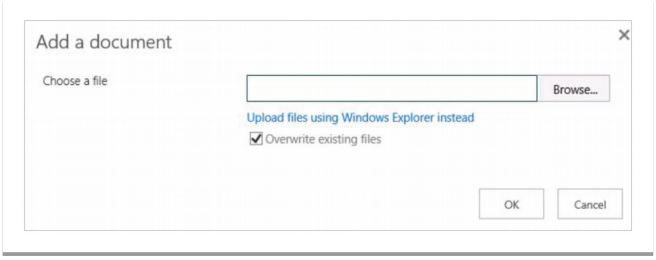
Uploading a Document

1. Navigate to the desired document library. Click **File** on the ribbon.
2. Click on the **Upload** button.



3. In the dialog window, click the **Browse** button and select the desired document,

then click **OK**.



Creating Subsites

SharePoint provides the ability to create subsites with a variety of features. Subsites can be team focused, workflow driven for a more "published" feel and function, or centered on a project with standard project related tools for task tracking and documentation control. These are but a few of the types that are available.

To create a new Subsite follow these steps:

1. Click on **Site Settings / Gear Wheel** and select **Site Contents** from the menu the Site Contents page appears.
2. Click on the **New Subsite** link under the Subsites section.
3. Enter values for the **Title**, **Description**, **and Web Site Address (URL)**, select a **Template**, and adjust the **Permissions** and **Navigation Inheritance**.
4. Click **Create** when done. You will be redirected to the **Site Contents Page** and the Subsite will be listed towards the end (under Subsites)

Create a Project Site

SharePoint provides a Project Site template that contains a set of webparts and pages to help Project Managers and Team members work on projects more efficiently. With Project Sites, users can capture tasks and assign them to people in their organization, store and manage project-related documentation, track project team events on a common calendar, view the project's status on a timeline and more.

Each project site has these project functionalities activated by default. These featured add a task list with a visual timeline, a calendar, and the Project Summary web part to the project site.

To create a new Project Site, follow these steps:

1. Click on **Site Settings / Gear Wheel** and select **Site Contents** from the menu the
2. Click on the **New Subsite** link under the Subsites section.
3. Enter values for the **Title**, **Description**, **and Web Site Address (URL)**, select the Project Site entry under the **Template** section, and adjust the **Permissions** and **Navigation Inheritance**.
4. Click **Create** when done. You will be redirected to the **Project** page

The new project site will contain Project Summary webpart, a **Getting Start with your Site** (or Tiles) webpart, news feed webpart, and a default Task list with a timeline. These new webparts and lists can help teams in tracking and managing projects, assigning tasks and collaborating with content related to projects in a more productive way.

Team Site VS Project Site

Project Sites

- Project Sites have project functionality and site features activated by default.
- A Project Summary WebPart is added to the main page by default.
- Project Sites have task lists added by default.

Team Sites

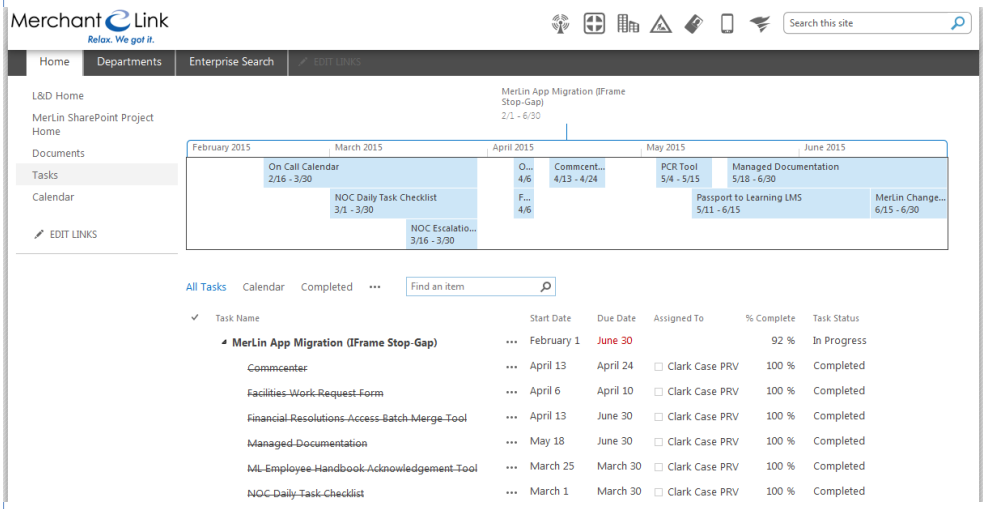
- Team sites have wiki page or home page site feature activate by default.
- Project functionalities are not active by default.
- Project webparts are added manually as they are not added by default.
- Team sites have team tasks listed rather than project tasks.

TimeLine & Project Summary WebParts

TimeLine & Project Summary are new WebParts that are added to each site created using Project Site Template.

TimeLine WebPart

Similar to Microsoft Project Server the timeline webpart provides an overview of the tasks that are added to a task list on a SharePoint site. Every task list by default displays a timeline webpart. With the timeline webpart, users have ability to add, remove, display, Indent, move, and delete tasks and subtasks. Additionally users can also change the font face, size, format, and color for the text used on the timeline. A typical task list timeline is shown in Figure below.

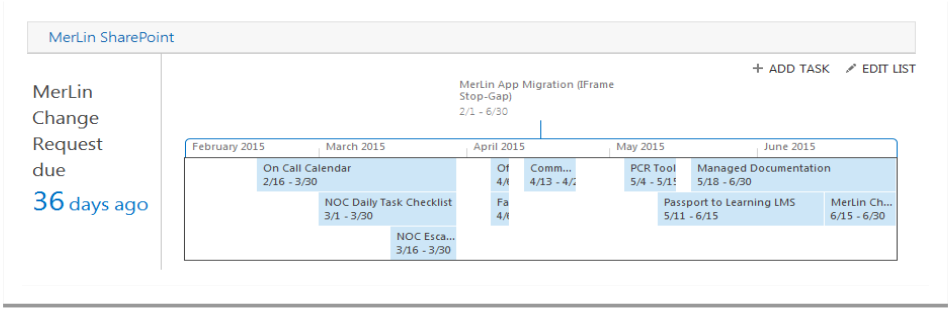


The Timeline above displays tasks and subtasks which are added to the corresponding task list below. These tasks are first created in the task list and then added to the timeline.

Project Summary WebPart

The project summary webpart provides a timeline with a high-level view of the events and tasks in a project this webpart is added by default to the project site's main page.

A typical Project Summary WebPart connected to a tasks list is shown in the figure below.



MerLin on SharePoint

Overview

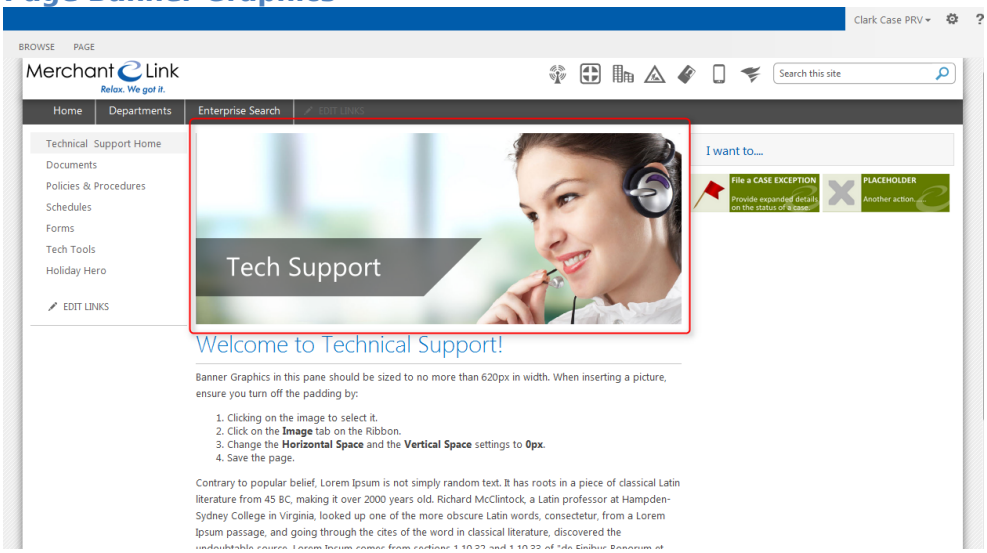
MerLin on SharePoint 2013 represents the 5th major version of Merchant Link's intranet portal. Under SharePoint, MerLin should be regarded as an informational hub and set of basic tools for various departments. MerLin is a specific identity while SharePoint can refer to other site collections and tools that exist outside of MerLin.

Site Structural and Style Rules

This section discusses the basic layout and style guidelines that must be followed using the site design created for MerLin on SharePoint.

These rules cover both the look and feel as well as information organization and site scalability. Any deviations from these standards should be brought to the governance board for approval.

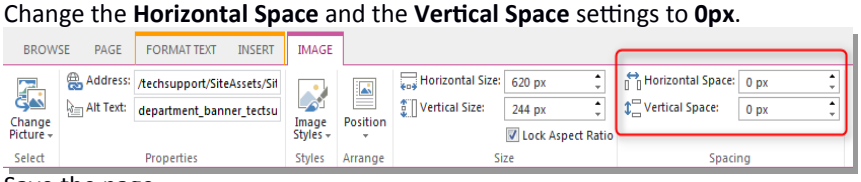
Page Banner Graphics



Banner graphics on department home pages are no more than **620px** in width. Using banners of a larger size will affect the layout of the page.

When inserting a picture, ensure you turn off the padding by:

1. Clicking on the image to select it.
2. Click on the **Image** tab on the Ribbon.
3. Change the **Horizontal Space** and the **Vertical Space** settings to **0px**.



4. Save the page.

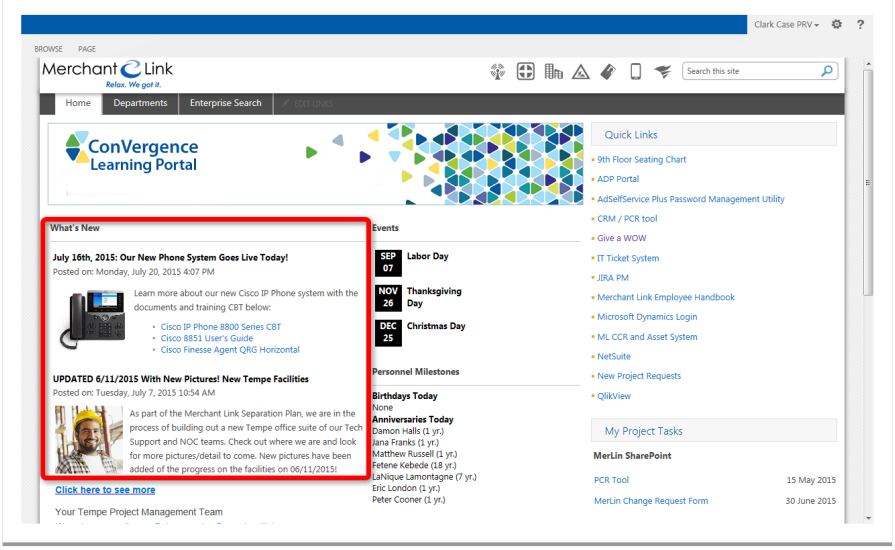
Universal Site Structural Elements

Every department site must include the following links in the quick links navigational panel that appears on the left of the page:

- Site Home (i.e. Learning and Development Home)
- Documentation
- Etc……

Adding News and Event Items

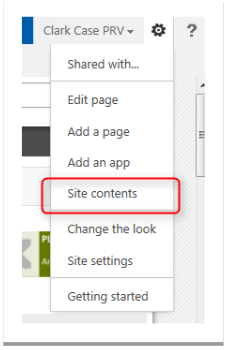
MerLin on SharePoint continues the tradition of providing a means to post announcements on news items of interest as well as events that are coming up. The homepage for MerLin contains a custom **What's New** web part that aggregates news items from all subsites in the site collection:



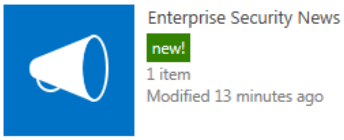
News items created at the root level or on any department subsite will appear here. This section will show the last 5 posted news items.

Creating a News Entry

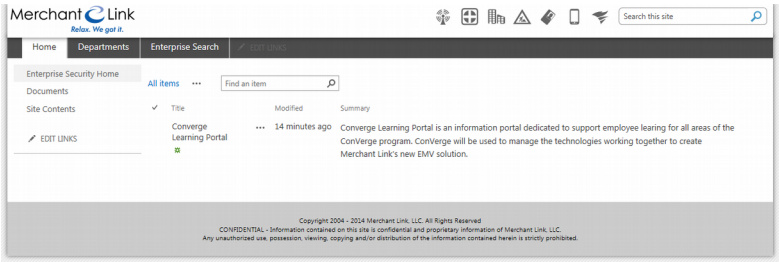
- From your department homepage, press the **Site Settings** / **Gear button**.
- Select **Site Contents** from the drop down menu.



- Select the **[Department] New** list. (Wherein Department is replaced by your department name or abbreviation.)



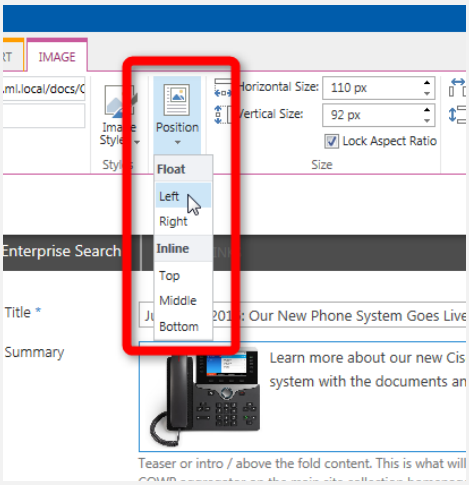
- The department News List displays.



- Select the **List** tab from the ribbon.
- Press the **New Item** button.
- Enter a **Title** for the news item.
- Enter a **Summary** for the news item

Note
The Summary field is what displays on MerLin's homepage. This filed should be brief and images should be small. (no more than 120px. X 120px.)

You can use the **Image** tab to properly wrap text around an image by pressing the **Position** button and selecting **Left** while the image is selected.



- Enter the **Body** of the announcement. This will show on the announcement detail page. The summary will not show on that page.

Note
If you use images or table formatting to control the layout, you must not create content with a width greater than 900 pixels in width or the content will flow outside of the template content area.

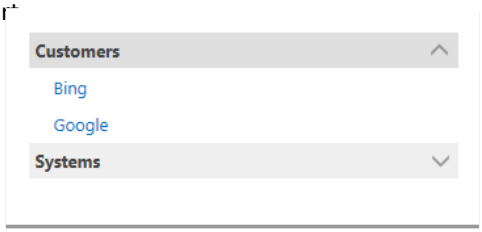
- You can enter a desired **Expire Date** but that data is not being used to control the display of the announcements at this time.

Creating an Event Item

Calendar Events are currently being maintained by the Site Collection Administrator. Contact the SCA for assistance.

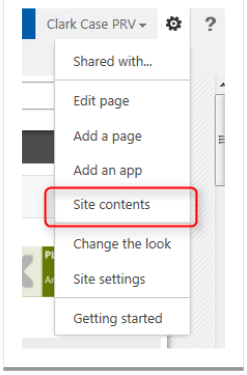
NOC Homepage Accordion List

The NOC contains a list of categorized links in a collapsible accordion list. Link categories are managed through a standard SharePoint list. Links are displayed using a customized Content Query Web Par

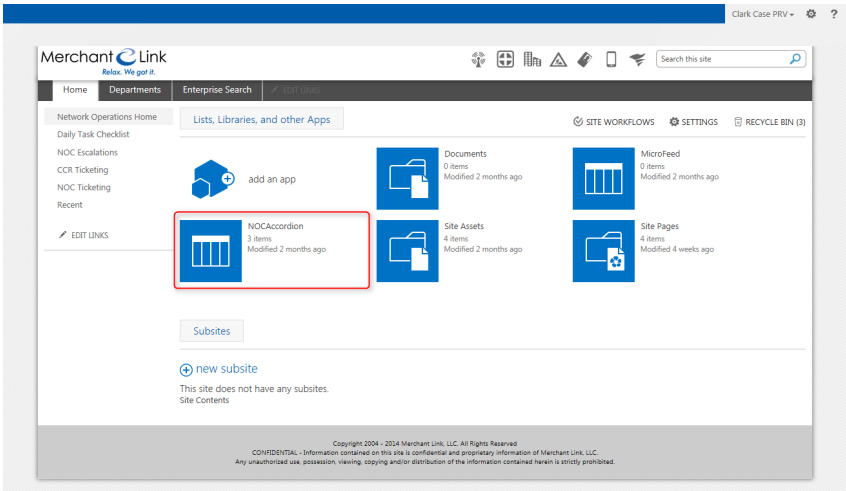


Adding a Category

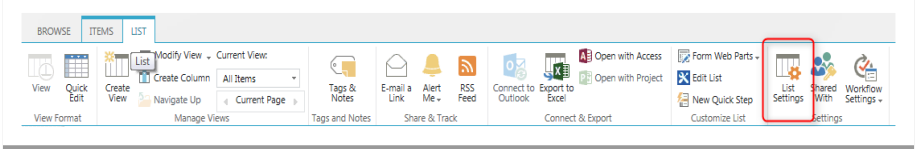
- From the NOC Homepage, press the **Site Settings** / **Gear button**.
- Select **Site Contents** from the drop down menu.



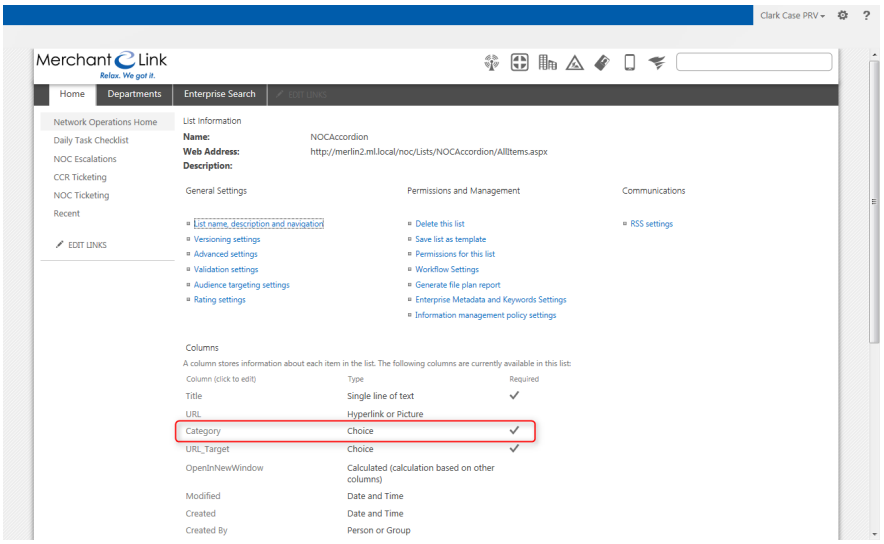
- Select the **NOCAccordion** list.



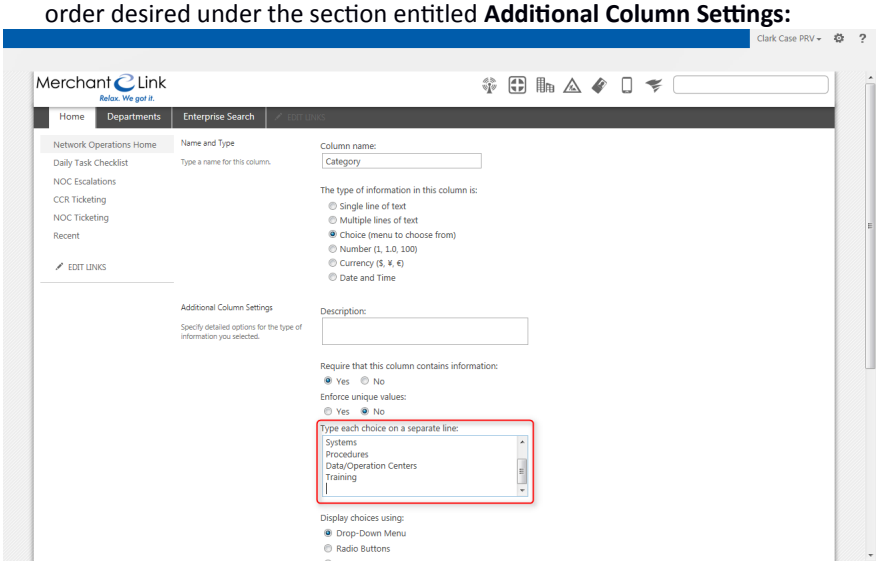
- Click on the **List** tab on the Ribbon.
- Click on the **List Settings** button.



- Select the **Category** field under the Columns section.



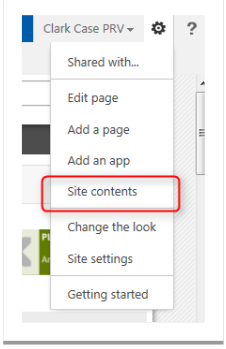
- Scroll to the bottom of the list of available options. Enter a new line in in the order desired under the section entitled **Additional Column Settings:**



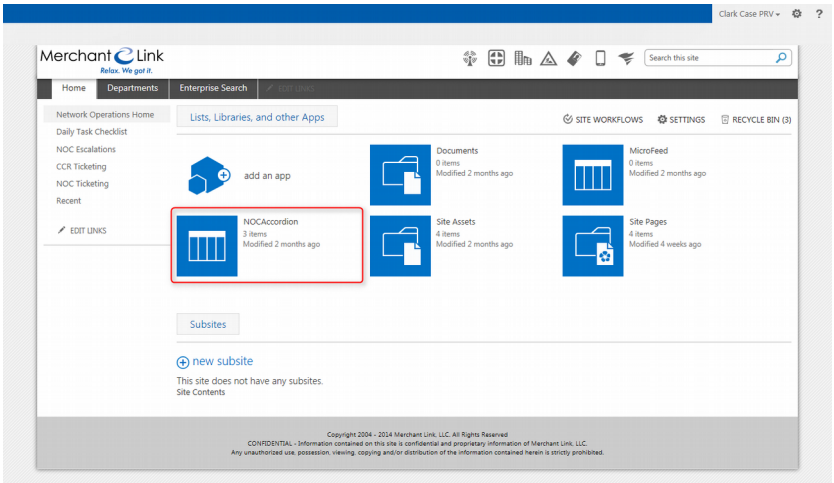
- Scroll to the bottom and press **Save.**

Adding a Link

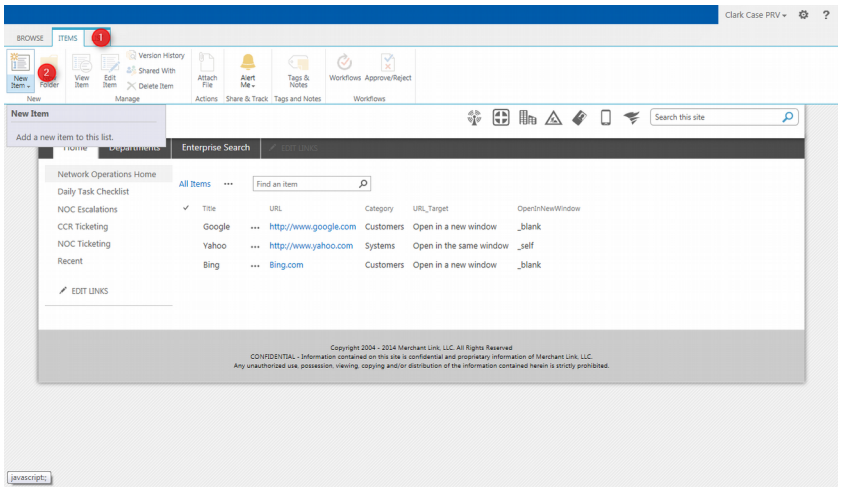
- From the NOC Homepage, press the **Site Settings** / **Gear button**.
- Select **Site Contents** from the drop down menu.

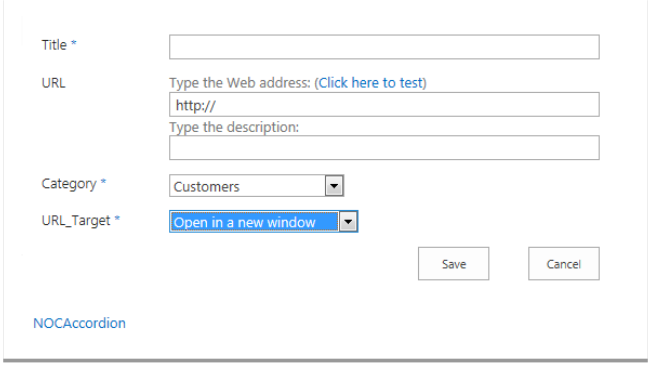


- Select the **NOCAccordion** list.



- Select the **Items** tab from the Ribbon.
- Press the **New Item** button.

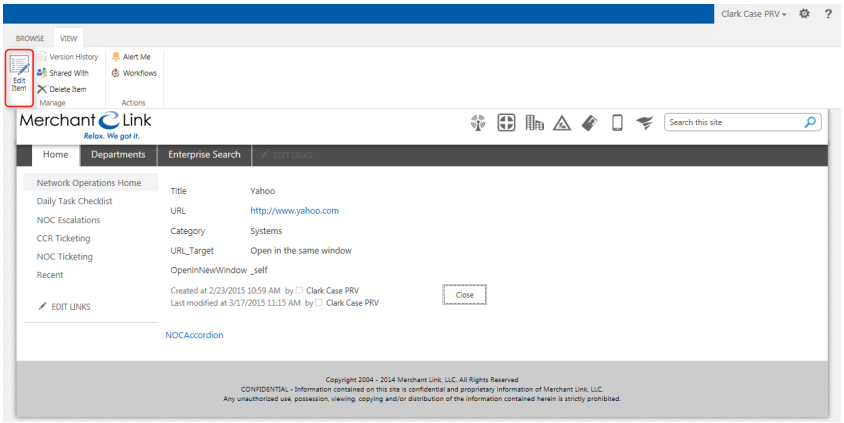




- Enter the **Title** of the link.
- Enter the full **URL** for the link. Optionally enter a description for the link.
- Select the link **Category**.
- Select how the link will open under the **URL_Target**.
- Press the **Save** button.

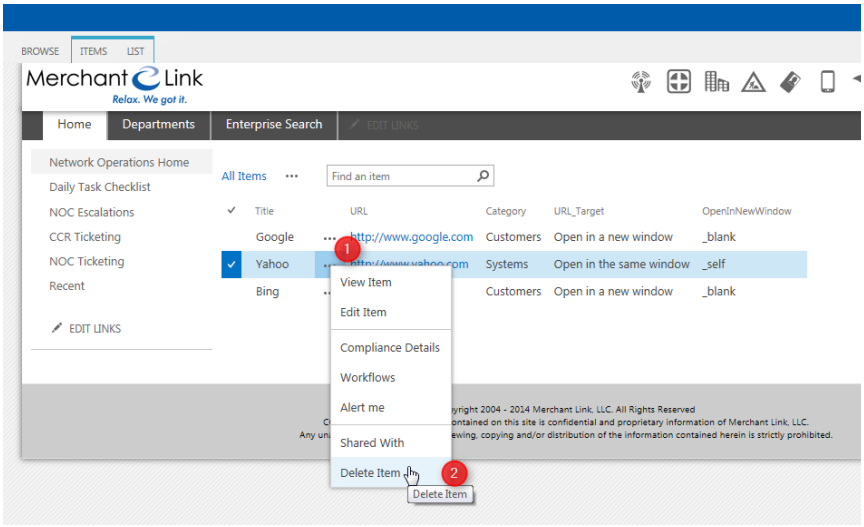
Updating a Link

- From the NOC Homepage, press the **Site Settings** / **Gear button**.
- Select **Site Contents** from the drop down menu.
- Select the **NOCAccordion** list.
- Select the desired link from the list. The detailed page displays.
- On the **View** tab, press the **Edit Item** button.
- Edit the desired fields
- Press the **Save** button.

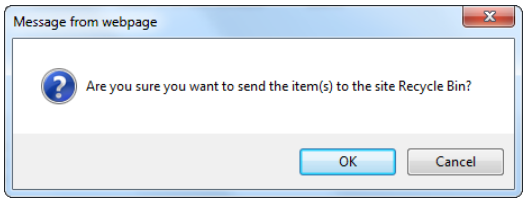


Deleting a Link

- From the NOC Homepage, press the **Site Settings** / **Gear button**.
- Select **Site Contents** from the drop down menu.
- Select the **NOCAccordion** list.
- Press the ellipsis button (…) next to the desired item and select **Delete Item** from the context menu.



- Press **OK** to commit the deletion of the link.



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MerLin Applications

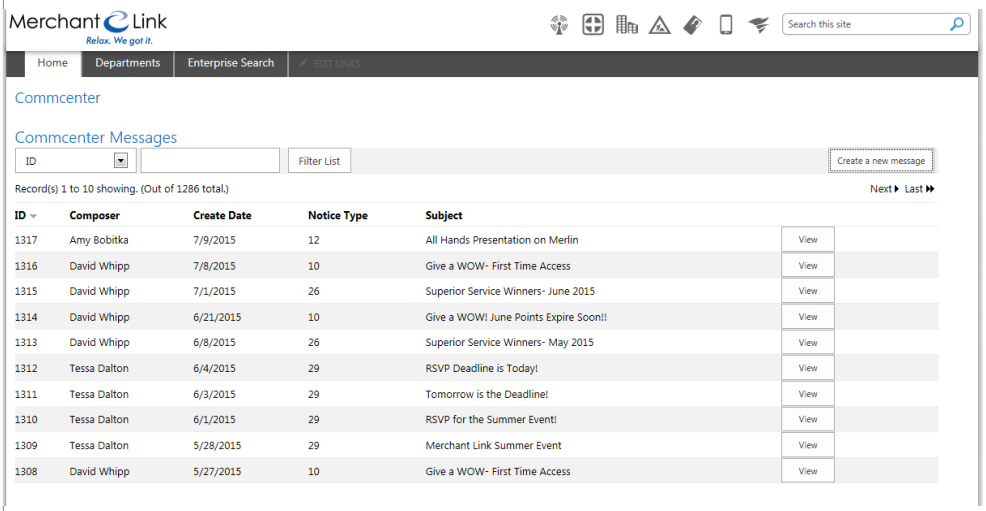
Introduction

The following MerLin applications and tools have been updated to be accessed from within SharePoint 2013. Changes to the functionalities and user interfaces are discussed further in this section

- CommCenter
- Daily Task Checklist
- Facilities Work Request Form
- Learning Management System (LMS)
- Managed Documentation (DMS)
- ML Employee Handbook Acknowledgement tool
- NOC Escalations Lookup
- Office Access Card Request Form
- On Call Calendar
- Passport to Learning
- PCR Tool
- Project Request Tool
- Tech Support Case Exceptions Tool

Commcenter

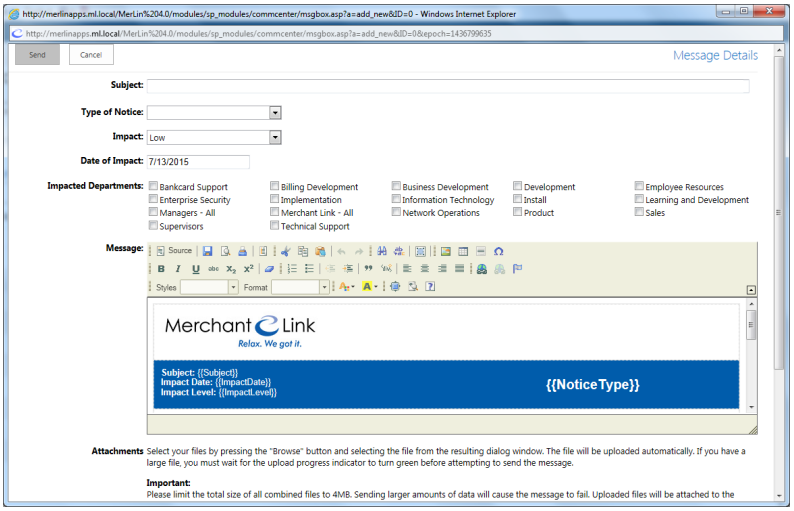
Merchant Link Commcenter provides a form based template for generating department or company-wide communications. This form helps to ensure a standardized look and format to official announcements.



The new interface provides a sortable list of past Commcenter announcements with a search bar. Results are displayed in a paged format.

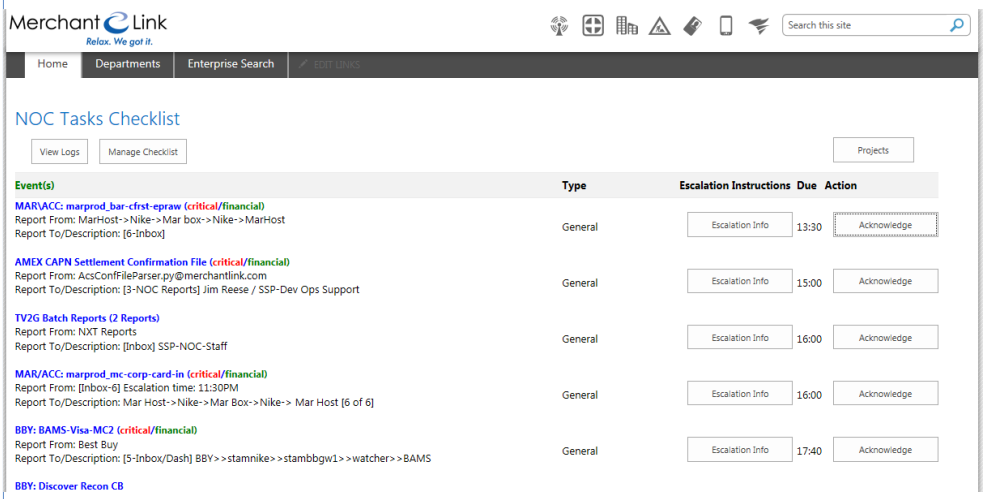
Creating a New Message

- Press the **Create a new message** button at the upper right of the page. The create dialog window appears:



- Enter the **Subject** of the message.
- Select a **Type of Notice** from the drop down selector.
- Select an **Impact** level.
- Enter a value for the **Date of Impact.**
- Check all **Impacted Departments** from the checkbox list. Notifications are sent to these recipients.
- A preformatted message appears in the editor. Placeholders for message mandatory items appear in brackets (i.e. **{{NoticeType}}**). These placeholders must remain in the message unedited. Replace the content area with your message.
- Attach any relevant files to the message. There is an upper limit of 4mb total. You can send any number of attachments as along as the total size remains under this limitation.
- Press **SEND** at the top of the form when you are ready to send the message. Allow the form to complete before closing the dialog window.

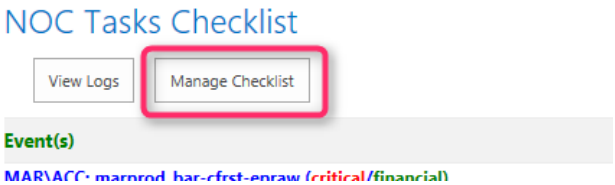
NOC Daily Task Checklist



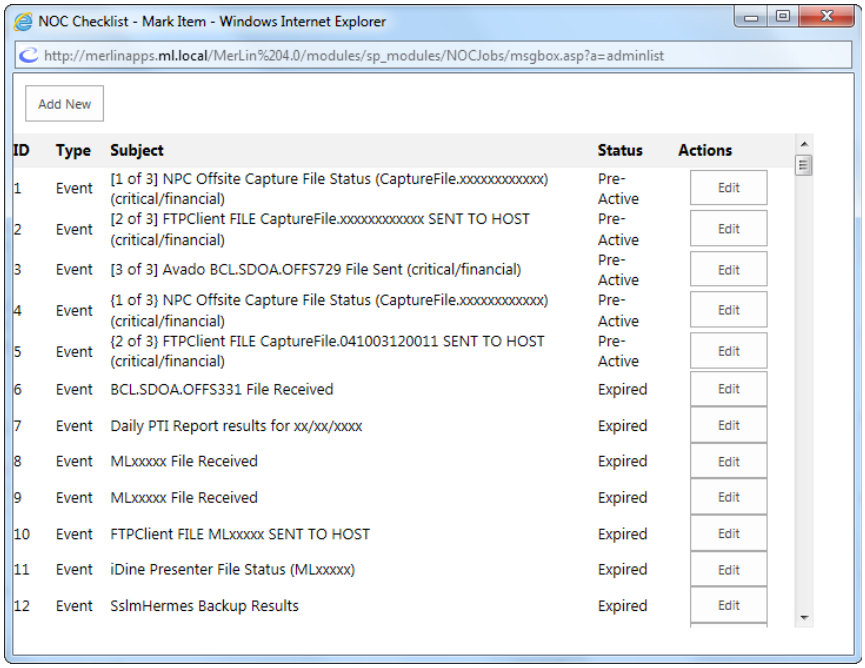
Managing the Checklist

Designated NOC team members are added to MerLin's **NCL-Admin** user group. (This requires a MerLin admin member to add this group to the user's profile in MerLin).

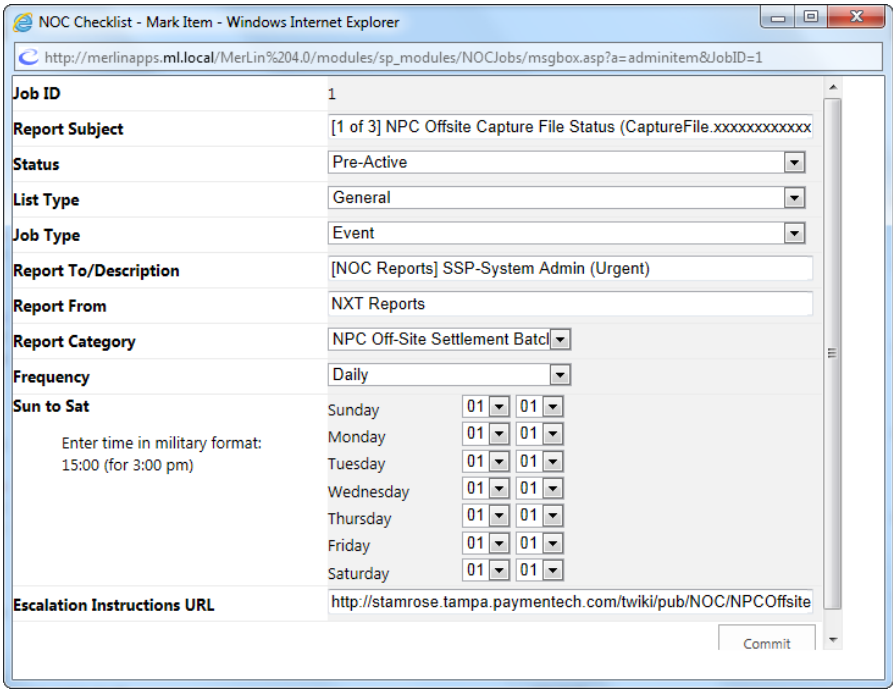
When the user is added to the group, they will see a new icon on the NOC Checklist page titled **Manage Checklist**:



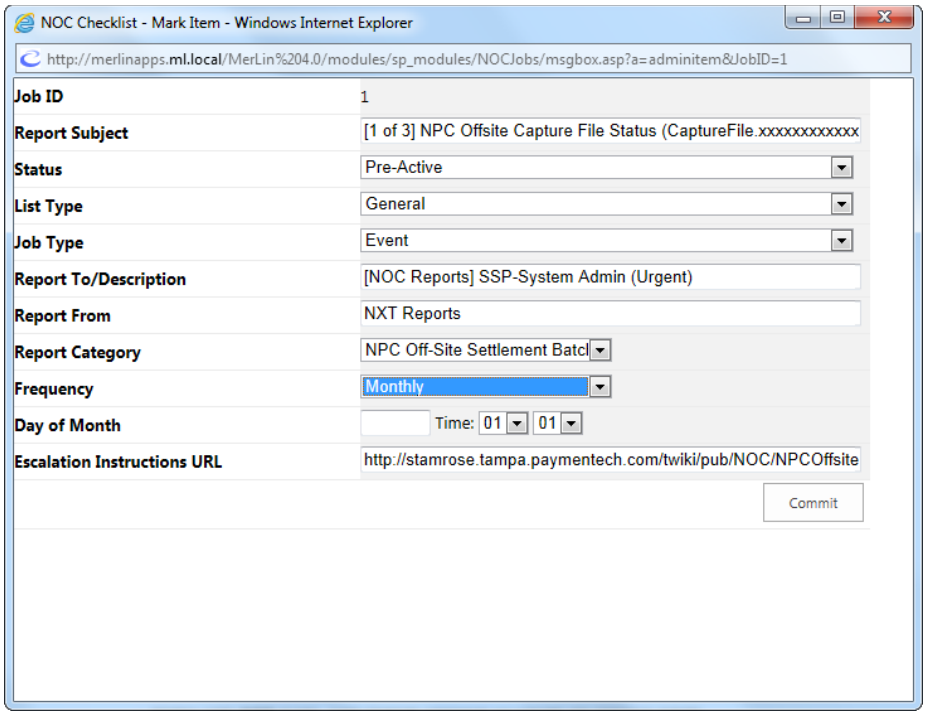
Pressing this button displays the **Manage NOC Checklist Entries** dialog. This dialog displays all currently active checklist items ordered by their JobID index number:



The **Add** New button at the top of the dialog opens a new item to be added to the list. Selecting the **Edit** button next to an entry displays the form populated with the item's information. With new additions you will see an empty version of the form:



Simply alter the data as desired. The dialog will update the fields when you toggle between daily events or monthly events:



- Press the **Commit** button once your changes are done.

Adding a checklist item

Press the **Manage Checklist** icon on the NCL homepage. The **Manage NOC Checklist Entries** dialog appears.

- Press the **Add** icon. The dialog update to show an empty form.
- Complete all fields on the form.
- Press the **Commit** button.

Editing a checklist item

- Press the **Manage Checklist** icon on the NCL homepage. The **Manage NOC Checklist Entries** dialog appears.
- Press the **Edit** icon. The dialog update to show the populated form.
- Alter all desired fields on the form.
- Press the **Commit** button.

Deleting a checklist item

- Press the **Manage Checklist** icon on the NCL homepage. The **Manage NOC Checklist Entries** dialog appears.
- Press the **Edit** icon for the checklist item you wish to delete.
- Change the **Status** selector from **Active** to **Expired**.
- Press the **Commit** button.

Points to remember

- Changing the **Report Subject** field on an existing checklist item will effect historical reporting. Reports pull the title from the JobID so if you change the name all past

data will use the new entry.

- All fields must be completed. When entering the **Day of Month** field on a monthly entry, you must also assign a time.
- All time is entered in Military format (i.e. 15:00 for 3:00 pm)
- You will have to put in a **MerLin Change Request (MCR)** if you need changes to the **Report Category** dropdown selector.

The **Escalation Instruction URL** must be populated correctly to work. If you are entering an URL to a document on any shared network drive the address must be preceded with **file:///** to work correctly.

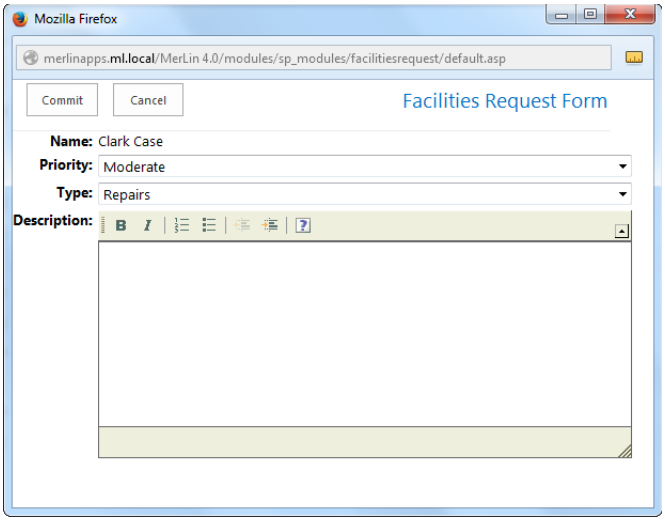
When copying the address from your explorer window you do not need to worry about correcting the forward/back slashes. The code will fix that automatically. (i.e. M:\SSP-Public\filename.ext would otherwise need to be changed to file:///M:/SSP-Public/filename.ext)

Be careful of spaces in the address. For example, when combining the path with the file name it is common to see that a space is introduced after the last slash and before the file name. If this occurs the link will not work.

Facilities Work Request Form

The Facilities Work Request Form has migrated with almost no change other than in look and feel. This tool provides the user with the ability to notify responsible staff members about issues within the Merchant Link facilities that need repair or attention.

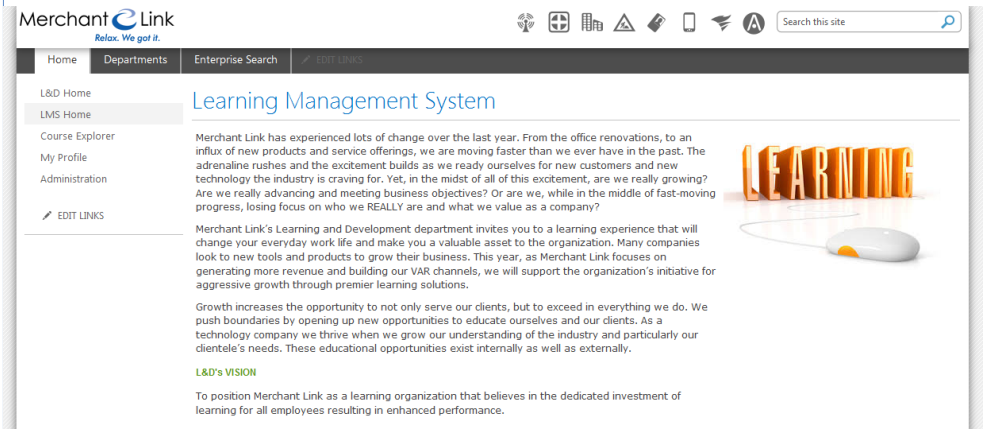
Once the form is filled out an email is generated to the appropriate contacts for resolution. The tool bar button pictured to the left is accessible on every MerLin on SharePoint page at the top of the page.



Learning Management System

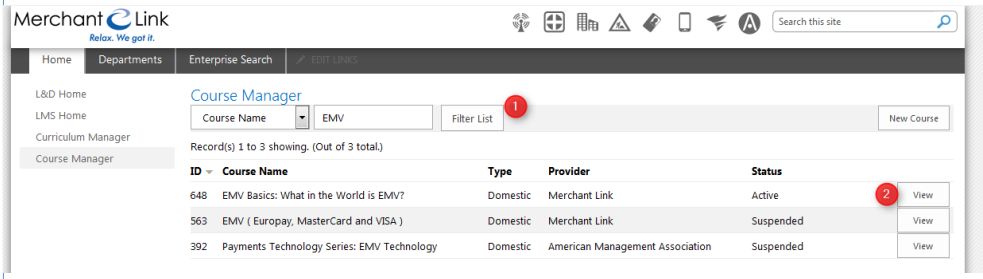
Formerly known as **Passport to Learning**, the learning management system provides tools to track staff member's learning experiences and to facilitate computer based training and compliance efforts. There have been a number of changed to this tool to simplify its use by both students and instructors.

- To access the LMS portal, select **Learning and Development** from the Departments entry on the main toolbar.
- Click on the **LMS Home** entry in the Quick Links navigational panel at the left. The Learning Management System's welcome page displays:

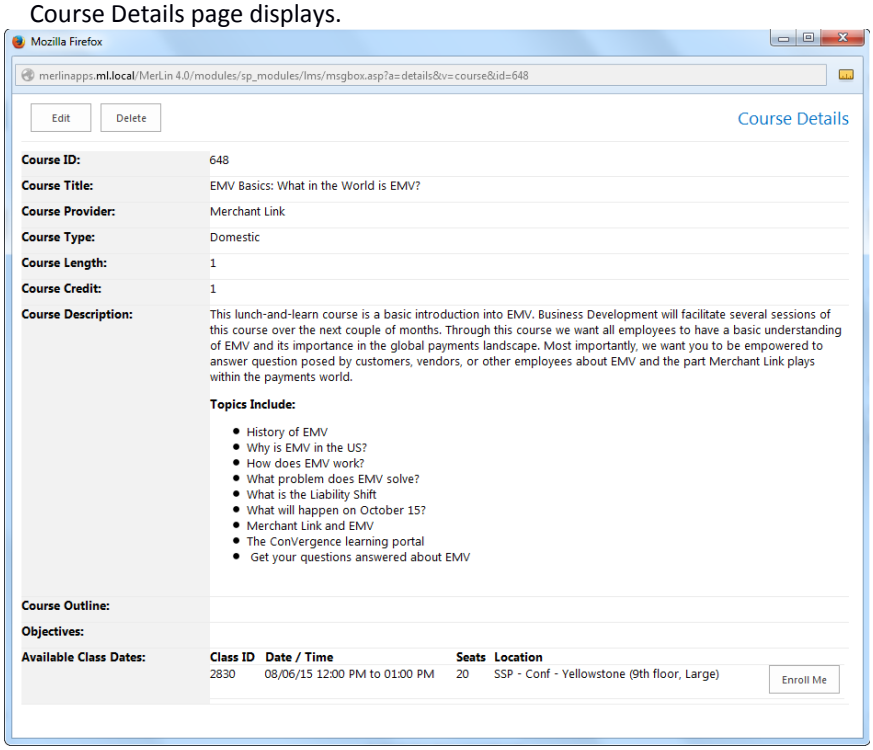


Searching for and Enrolling in Courses

The Course Explorer provide you with tools to search for information on available courses that are provided by Merchant Link or an approved Third-Party vendor. The course listing provides tools to search for a course, to page through a list of courses, and to view the details of a course.



1. To search for a course by name, change the drop down on the search bar to **Course Name**. Enter a search term and press the **Filter List** button.
2. To view details on a course press the **View** button at the right of the record. The Course Details page displays.

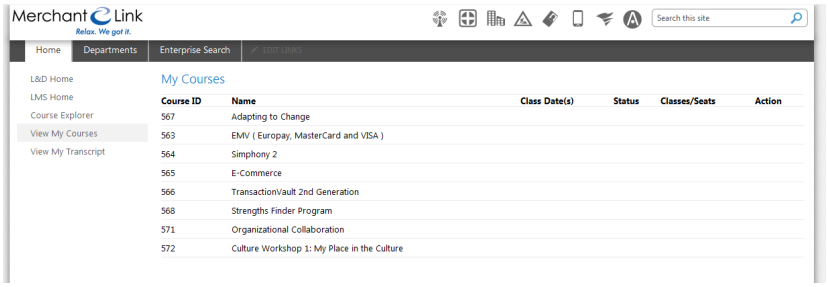


- Information on the course's provider, description, objectives and course outline appear.
- If an Instructor-Let course (ILT) had scheduled class sessions available, they will show under the **Available Class Dates** section. If the class has seating available or will offer remote attendance, then an **Enroll Me** button displays. Clicking this button will add the course and class date to your course profile.

Viewing your Courses

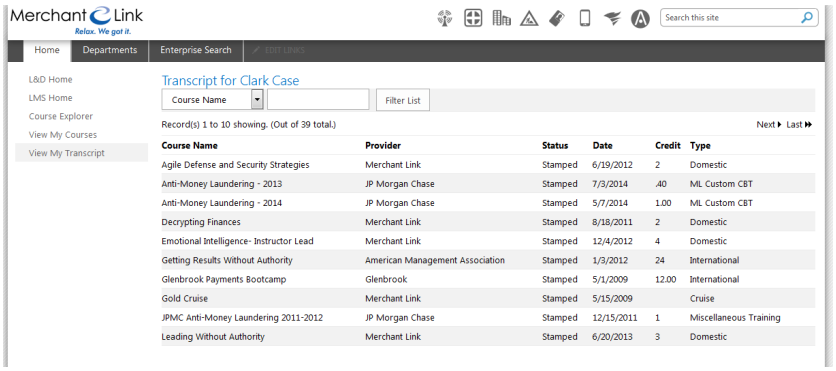
To view a list of the courses you have completed:

- Navigate to the LMS homepage from the Learning and Development homepage.
- Click on **My Profile** under the Quick Links navigation panel on the left. Your course profile displays:



Accessing Your Transcript

- Navigate to the LMS homepage from the Learning and Development homepage.
- Click on **My Profile** under the Quick Links navigation panel on the left.
- Click on **My Transcript** under the Quick Links navigation panel on the left. Your transcript with all completed courses displays:



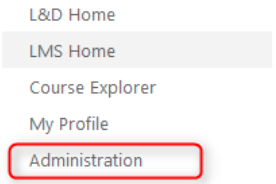
This view provides you with a paged list of all completed courses. The list can be sorted by various column headings as well as filtered with the search bar in the same manner as the Course Explorer.

Administrative Functions

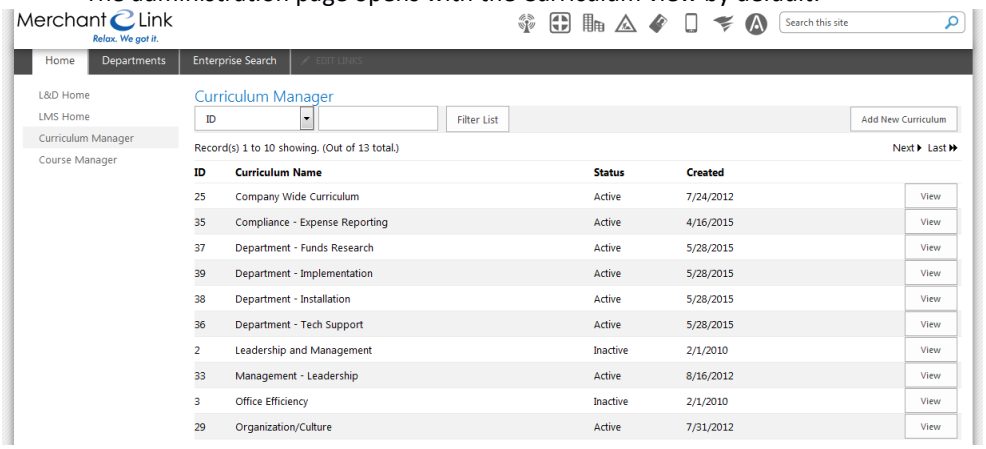
For those staff members with appropriate permission levels, there appears a set of tools to manage the courses, class instances, and user profiles for the system. Information on these tasks appear below.

To access the administrative area:

- Navigate to the LMS Homepage.
- Click on the **Administration** entry in the Quick Links navigation panel:



- The administration page opens with the Curriculum view by default:



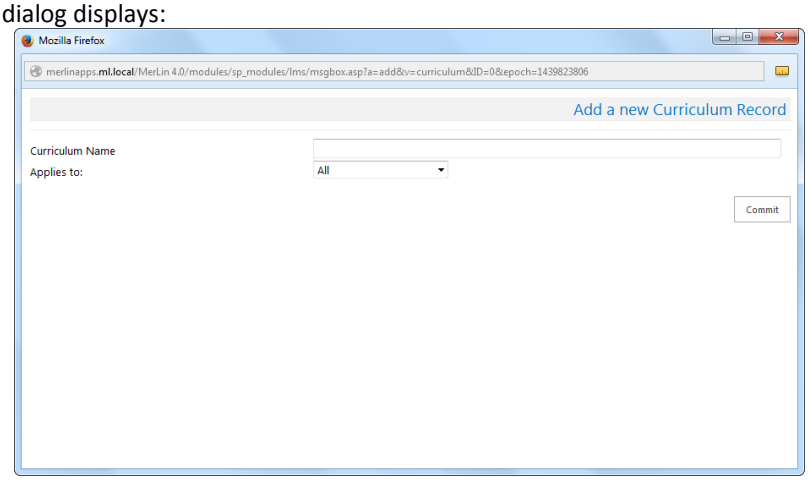
Creating a New Curriculum Entry

The Curriculum Manager provides the ability to create groups of course under a single curriculum name or header. This allows the curriculum to be assigned to a department, a MerLin group of users, or to the company as a whole.

Courses attached to these curriculum records will automatically display on the appropriate users' course profiles. They will not have to be added to a user's profile or manually enrolled in by the user.

To create a new curriculum record:

- Press the **Add New Curriculum** button at the top, right of the page. The data entry dialog displays:

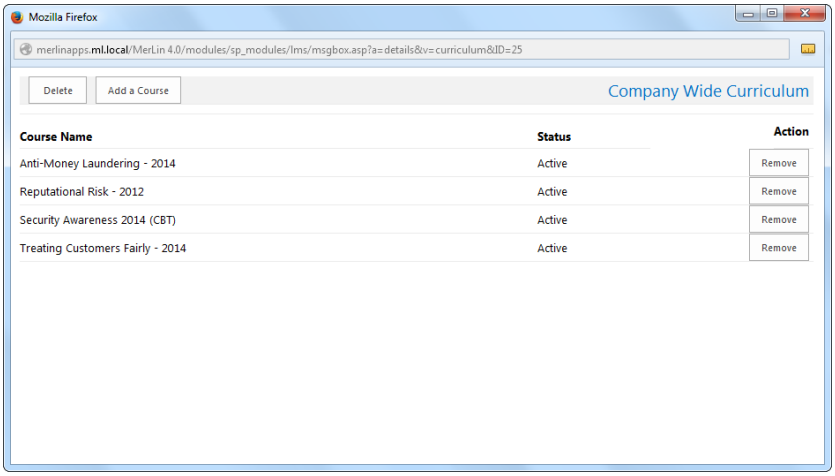


- Enter a **Curriculum Name**.
- Select who this curriculum **Applies To** (i.e. All, Department, User Type.
- Select either the **Department** or **User Type** if you selected either of these options.
- Press the **Commit** button to save your entry.

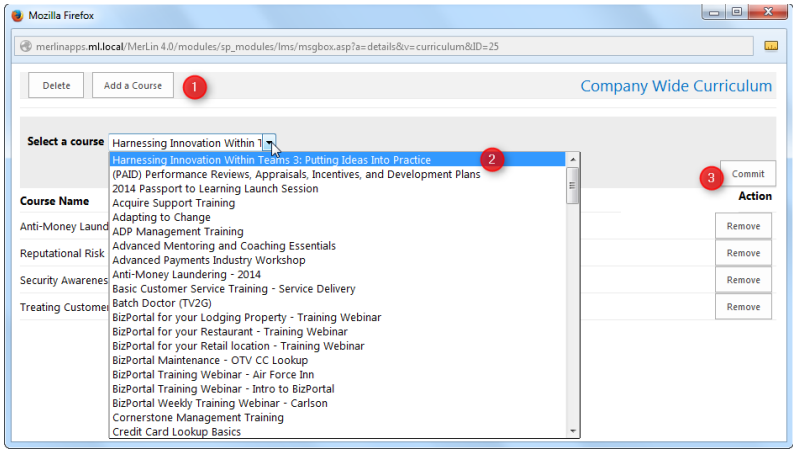
Adding Courses to a Curriculum

To add courses to a new or existing curriculum record:

- Browse to the Curriculum Manager.
- Click on the **View** button to the right of the desired curriculum record. The curriculum details dialog appears.



1. Press the **Add a Course** button at the top of the dialog.
2. Then **Select a Course** entry field appears at the top of the screen,
3. Press the **Commit** button to add the course. The course now appears in the list.



Removing a Course from a Curriculum Record

- To remove a course, press the **Remove** button next to the course desired. As confirmation dialog displays.
- Press **OK** to commit the removal action.

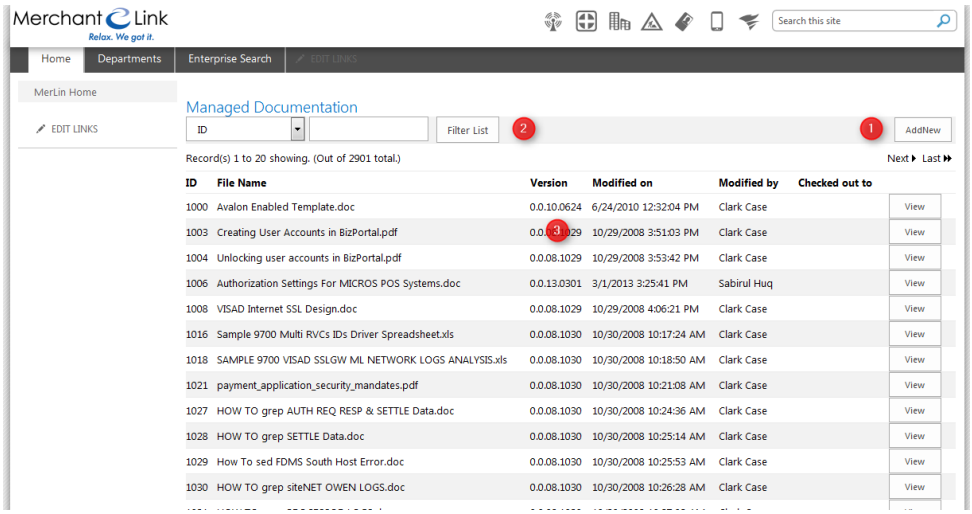
Managing and Creating Courses

TBD

Managed Documentation

SharePoint 2013 contains its own tools to upload and manage documentation. The Traditional **Managed Documentation** tools from the original version of MerLin has been included as a convenience to allow document owners time to get familiar with SharePoint's tools and capabilities.

As documentation is converted over to SharePoint natively, this tool will be phased out from general use. In the meantime, updated instructions for using this tool are included here.



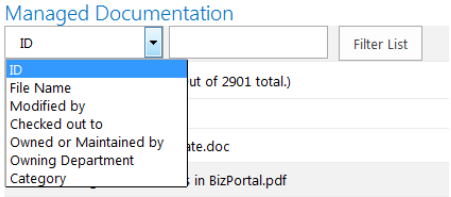
- **Main Toolbar** – Provides a button to **upload a new Document.**
- **List Filter** – Allows the user to filter or search by several fields limiting the records being shown.
- **Documentation List** – Provides a list of documentation that are sorted by the column headers. The list is also paged so you can navigate First/Previous / Next / Last views. The page displays 20 records at a time.

Filtering Documentation

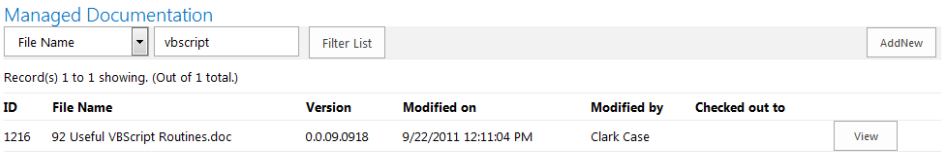
To filter or search for a document:

- Drop down the select box and choose a field to search against:

- ID
- File Name
- Modified by
- Checked out to
- Owned or Maintained by
- Owning Department
- Category

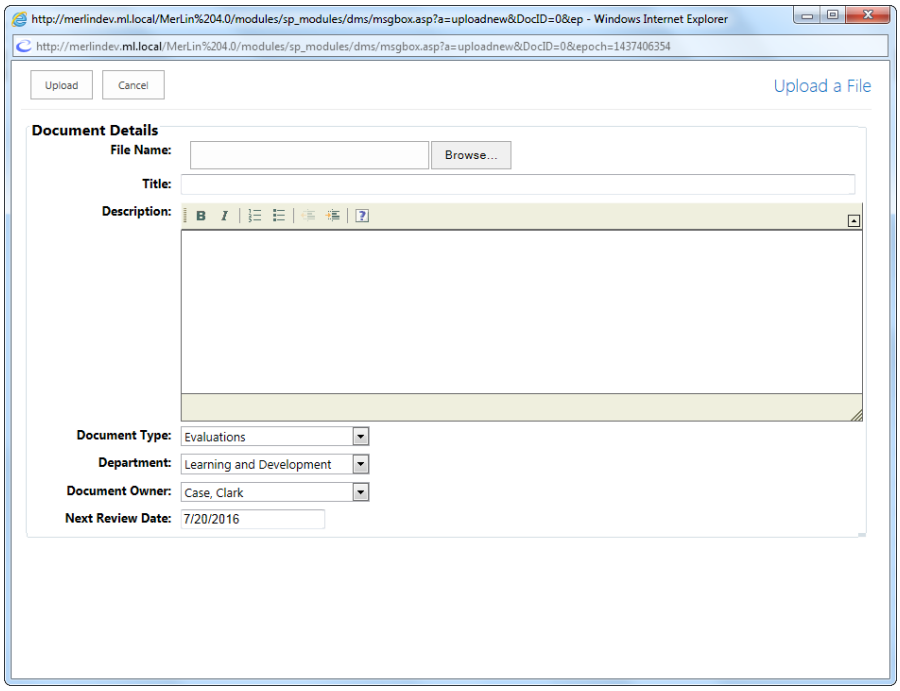


- Enter the search keywords or other criteria in the text box provided. Selecting certain fields will replace the text box with a dropdown list such as searches for names of those who have a document checked out, the owner of the document, etc.
- Press **Filter List** to apply the search. The results appear:



Uploading a NEW document

The following instructions provide details on uploading a NEW document to the Document Management System. If a document has already been published to MerLin it should be checked out of MerLin for editing and then checked back in to the system. Details on accomplishing those tasks appear later in this document.



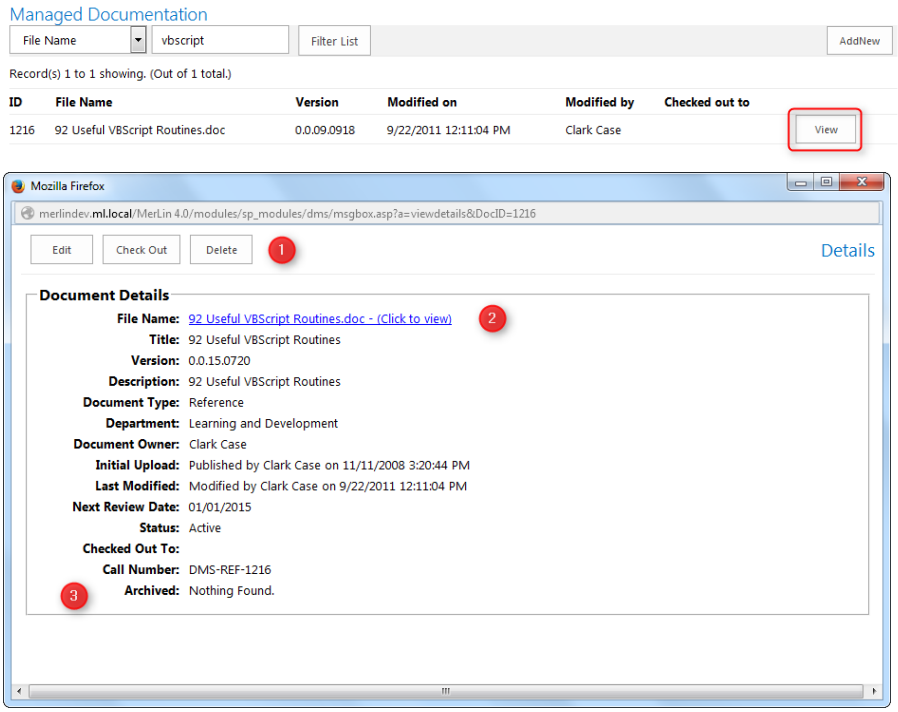
- Press the **Browse** button.
- Find the local file on your system using the dialog window and press **Open**.
- Enter the **Title** of the document.
- Provide a **Description** for the document.
- Assign a **Document Type** for the document.
- Assign the **Department** that owns or maintains the document.
- Assign the **Document Owner**. (If there isn't a current owner then the document should be assigned to the department head).

- Choose the **Next Review Date**.
- Press the **Upload** button on the top toolbar to upload the document.

Checking Out a Document for Editing

To check out a document for editing:

- Select **Managed Documentation** from the Quick Links section of the MerLin homepage.
- Locate the document by filtering on an available field or doing a free text search against the contents of a file.
- Once located, click on the **View** button to the right. The **Details** dialog displays.:

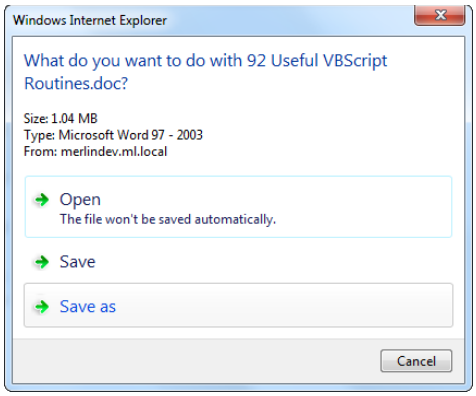


1 – Toolbar
Contains actions that can be taken on the document such as Editing certain details, checking the document out for editing, or deleting the document. The delete button is only available to MerLin administrators or the document owner.

2 - Document Details
This panel displays various attributes on the document as well as a hyperlink to open and view the document.

3 – Archived
This new addition provides a view of all prior versions of the document that have been committed to the system. A hyperlink to open the historical copy is provided along with other document attributes.

- Press the **Check Document Out** button on the toolbar at the top. A **File Download** dialog window displays:



Note
The **File Download** dialog will display for most Office documents. If the document is an Acrobat file (.pdf), it will open in the browser window instead.

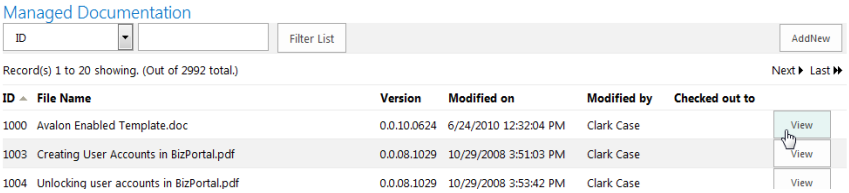
If you receive a dialog asking you to provide your username and password, simply click **Cancel** or hit the **Escape** key.

- Select **Save** from the file download dialog.
- The document is immediately stamped as checked out.

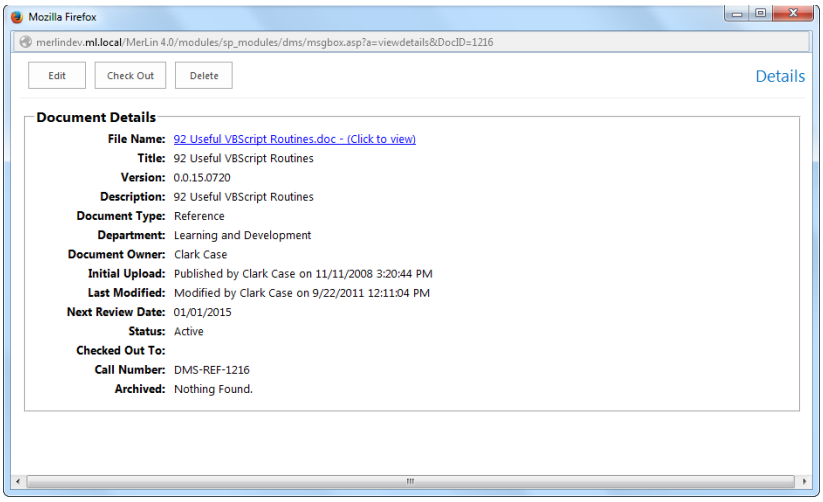
Checking Documents In

After you have made changes to your document you can upload it to MerLin to replace the prior version. Do **not** use the **Upload a New Document** button. You must perform the following steps to successfully update existing documentation:

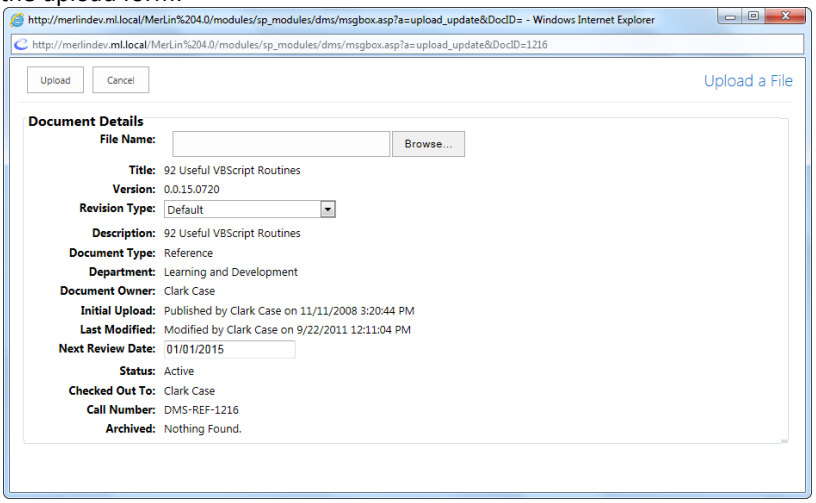
- Select **Managed Documentation** from the Quick Links section of the MerLin homepage.
- Locate the document by filtering on an available field or doing a free text search against the contents of a file.
- Once located, click on **View** button located at the right of the record:



- When pressed, the Document Details dialog displays:



- Press the **Check In** button on the top toolbar. The File Details windows will display the upload form:



- Press the **Browse** button to locate your local updated copy.
- Select the **Revision Type** from the dropdown. This will affect the version number of the document:
    1. **Default**
       The Default option will change the version number in the last two positions For example, version 0.0.**14.0224** will be updated to 0.0.**14.0225**
    2. **Minor**
       The version number will be updated on the last three positions. For example. 0.**0.14.0224** becomes 0.**1.14.0225**
    3. **Major**
       The version number will be update on the first position and the last two positions. For example, **0**.0.**14.0224** becomes **1**.0.**14.0225**
- Select the **Next Review Date** from the calendar field.
- Press the **Upload** button on the top toolbar.

Notes:

Document names must remain the same. If you choose a file with a different name from the dialog window, the system will alert you and empty the file field. You will be required to locate your local copy again using the browse button.

The existing document will be archived and then overwritten by default. There no options to change this behavior.

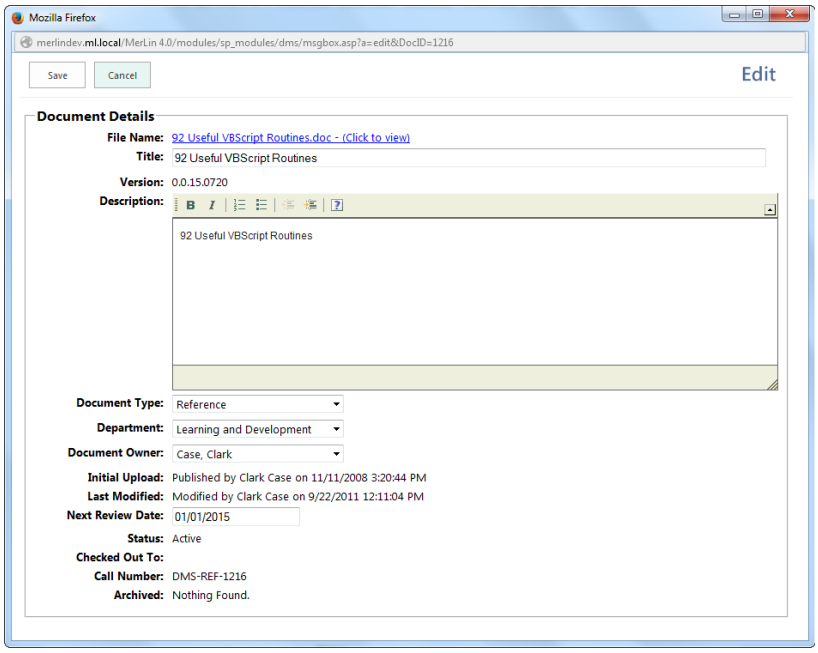
Documents uploaded on the same day will overwrite the existing document and will not update any archived version so multiple revisions on the same day will result in the file reflecting the last uploaded version.

Editing Document Attributes

The DMS allows document owners and DMS administrators to change some basic attributes stored by the system as well as to change the ownership of the document by a specific individual and/or department.

To edit the document attributes, perform the following steps:

- Select **Managed Documentation** from the navigation panel on the left.
- Locate the document by filtering on an available field or doing a free text search against the contents of a file.
- Once located, click on the file name to drop down the menu.
- Select **Edit Properties** from the dropdown menu. The **File Details** window displays:



- Update the **Title** of the document (note that this is NOT the filename of the document).
- Make any needed changes to the **Description** of the document. Basic editing tools are provided.

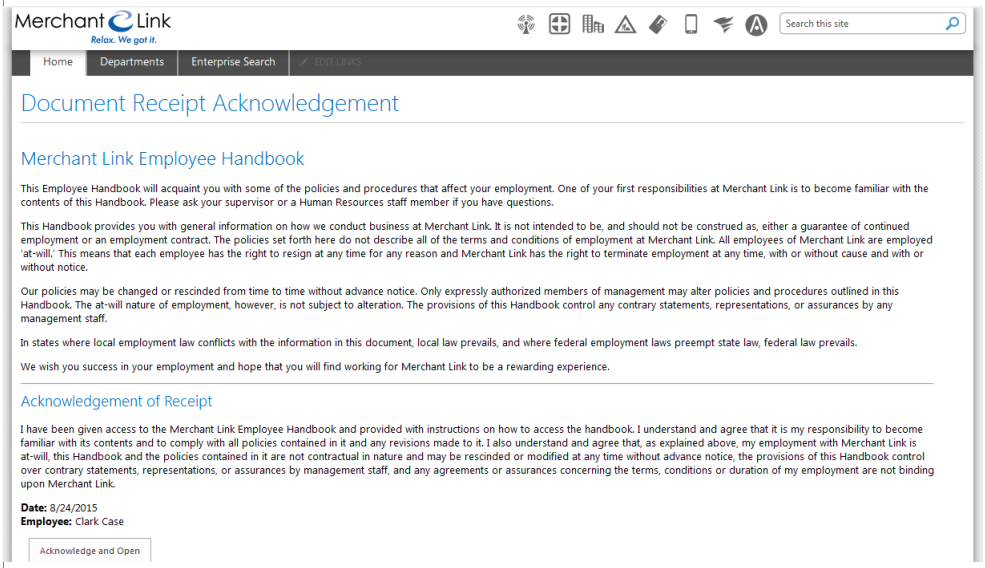
- Update the **Document Type**. This will move the file from one document type folder to another on the MerLin server.
- Update the **Department**. This will move the file from one department folder to another on the MerLin server.
- Update the **Document Owner**. This reassigns the document to the selected owner who will have edit and delete rights over the file.

Update the **Next Review Date** as needed.

Press the **Save Changes** button to commit the changes.

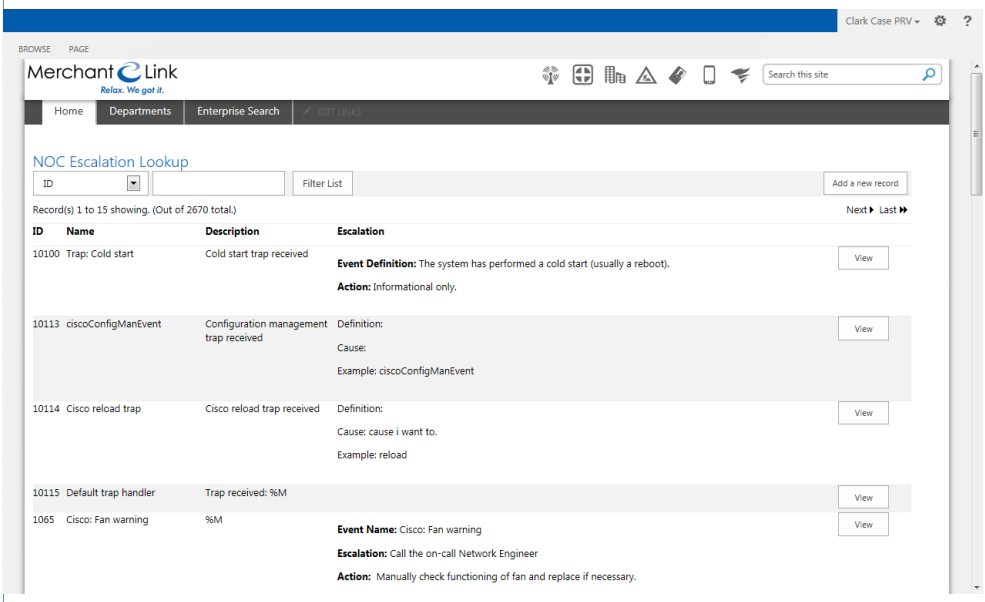
ML Employee Handbook Tool

The Employee Handbook Acknowledgement Form functions in the same way as it did in the custom MerLin portal. New users are presented with a notification and hyperlink to download the employee handbook. Once that link is followed the client information is recorded. Reports are generated by request to the MerLin development group.



NOC Escalations Lookup

The Network Operations Center (NOC) Escalations Lookup tool provides the ability to search for known error messages and their escalations procedures. This tool has been ported over with little to now changes to its features and functionality as they appeared in the custom version of MerLin.

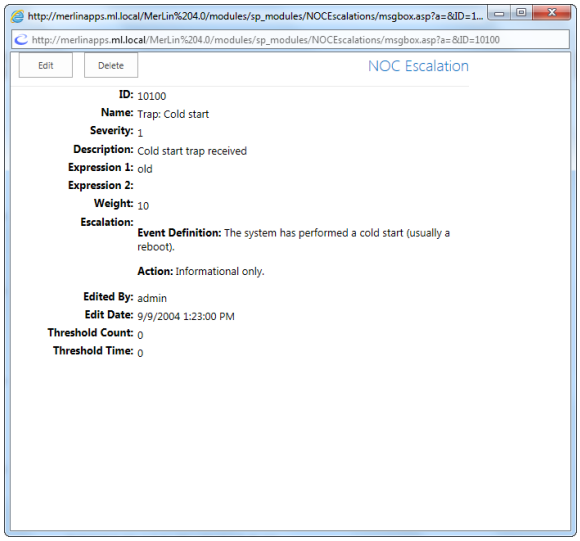


Viewing Entry Details

After you have searched for a particular error message, you can view the details of a record by clicking on the **View** button to the right of the record. Details are then displayed in the

popup dialog window.

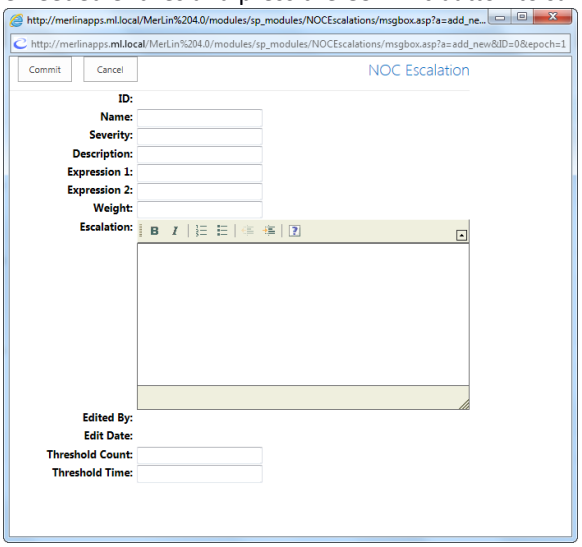
Depanding on your permission levels you may have the ability to edit or delete the record. Buttons for all actions you may perform are at the top of the dialog window.



Adding a New Record

To add a new escalation record:

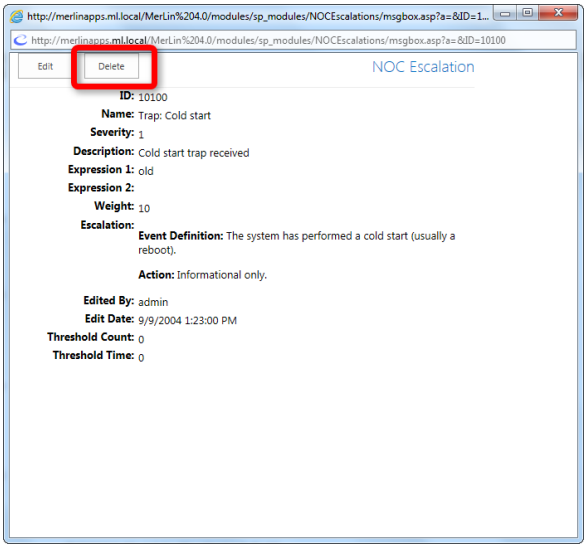
- Navigate to the **NOC Escalations** tool using the link on the Quick Links launch panel on the left side of the NOC homepage.
- Click the **Add a new record** button at the upper right side of the list. The Add a new record dialog displays.
- Make all the needed entries and press the **Commit** button to save the new record.



Deleting an Entry

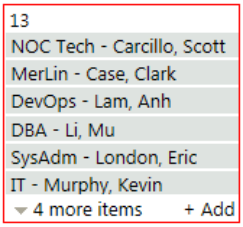
- Navigate to the **NOC Escalations** tool using the link on the Quick Links launch panel on the left side of the NOC homepage.
- Click the **View** button for the record you want to delete. If you have permissions to delete records, the toolbar will include the **Delete** button.

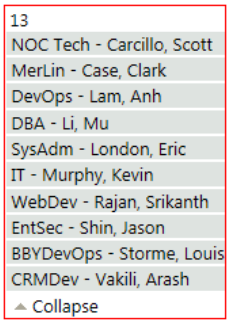
- Press the **Delete** button. A confirmation dialog bog displays. Press OK to continue with the deletion of the record.



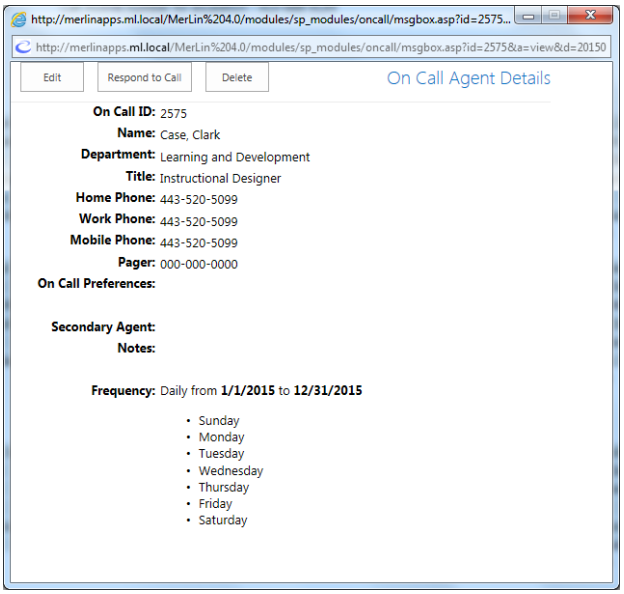
Agent On Call Calendar

The Agent On Call Calendar has had a number of changes to the interface. The calendar will show with a limited number of agents showing should there be more than can be displayed. Hovering over the cell will show a link to expand or collapse the cell:



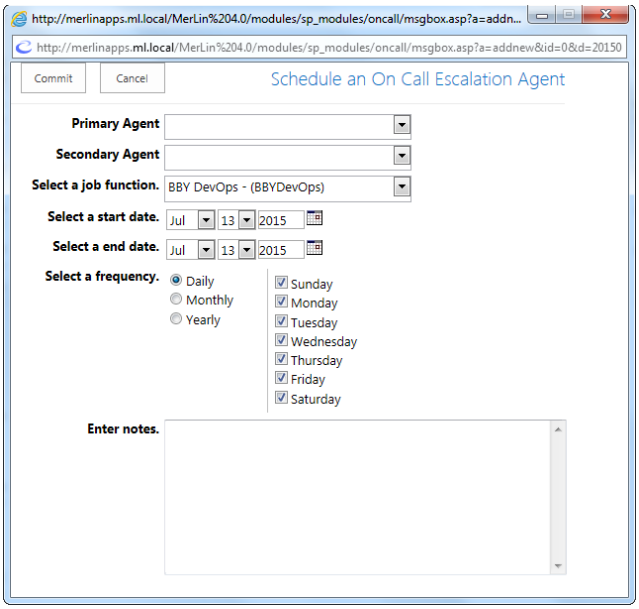


Additionally, a link to **Add** a new on call item shows when hovering over the cell. Clicking on any of the user entries displays a dialog window with all the information for the on call agent:



Creating a New On Call Agent Record

- Navigate the calendar to the month desired
- Hover over the date the record will start. A band with the **Add** hyperlink displays.
- Click on the **+Add** hyperlink. The **Schedule an On Call Escalation Agent** displays.



- Select the **Primary Agent** from the dropdown.
- Select the **Secondary Agent** from the dropdown (if applicable).
- Select a **Job Function** from the dropdown.
- Select a **Start Date** for the on call record.
- Select a **End Date** for the on call record.
- Select the **Frequency** for the record (Daily, Monthly, Yearly)
- Enter any additional **Notes** for the record.
- Press the **Commit** button at the top of the dialog.

Editing a On Call Record

This action requires proper permissions to perform. If you do not have permissions sufficient to make these changes, see your manager to request approval.

- Find the date and agent for a record.
- Click on the Agent name. The **On Call Agent Details** Dialog window displays.
- Press the **Edit** button at the top of the dialog. The dialog enters edit mode.
- When you are done with your changes, press the **Commit** button at the top of the dialog window.

Deleting an On Call Record

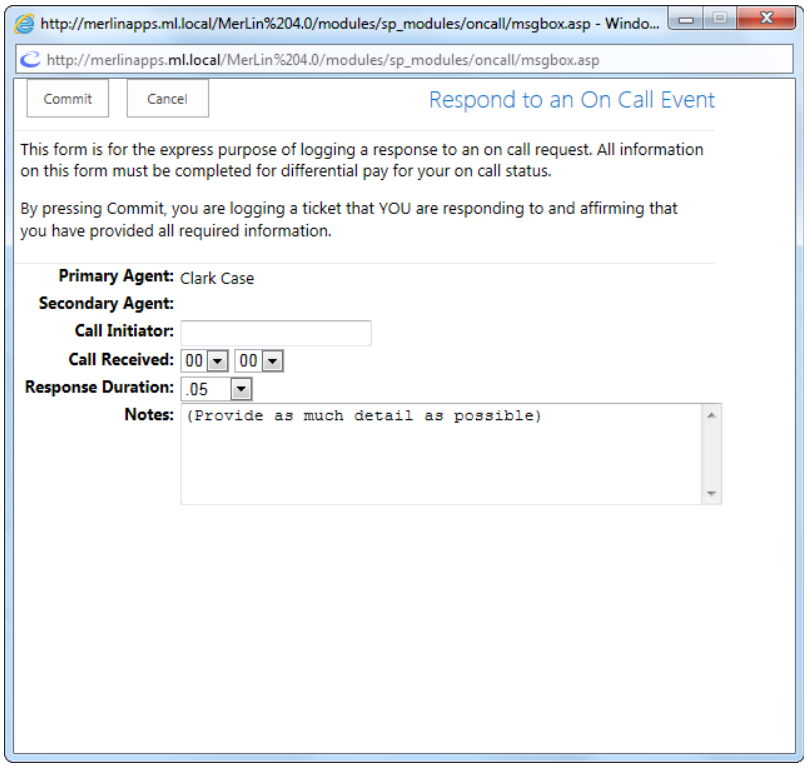
This action requires proper permissions to perform. If you do not have permissions sufficient to make these changes, see your manager to request approval.

- Find the date and agent for a record.
- Click on the Agent name. The **On Call Agent Details** Dialog window displays.
- Click on the **Delete** button. A confirmation dialog displays.
- Press **OK** to complete the deletion of the record.

Responding to an On Call Event

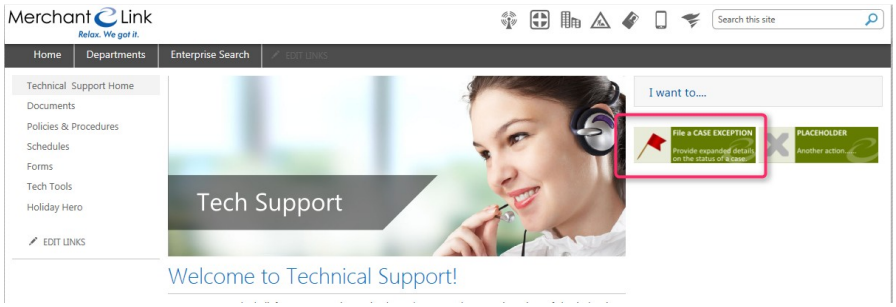
If you are a designated On Call Agent responding to a call for assistance, you can log that response and have notification sent for proper compensation and records keeping purposes. Responses can only be logged on the day that they are received. (If logging near midnight, please do all you can to enter the event prior to midnight for proper accounting).

- Navigate to today's date on the calendar.
- Select your name from the calendar. If you are not the on call agent but are responding in their place, select that agent / job function.
- Click on the **Respond to Call** button.
- Enter the name of the **Call Initiator**.
- Enter the time under **Call Received.**
- Enter the **Response Duration**.
- Enter as much detail as possible under the **Notes** entry.
- Press **Commit** to complete the form entry.



Tech Support Case Exceptions Tool

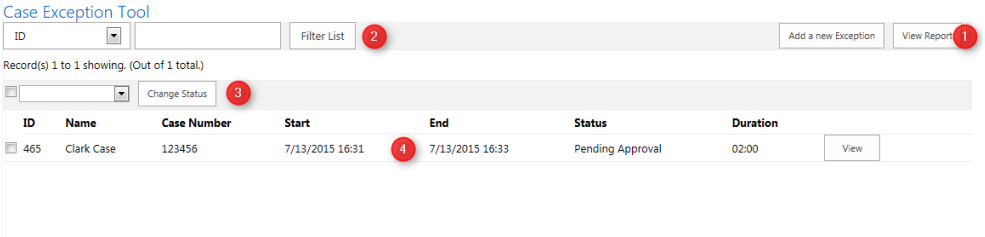
The Tech Support Case Exceptions tool is located under a hyperlink on the tech Support homepage under the section entitled “I want to…”



This section provides information on how MerLin on SharePoint supports the recording of time worked on cases that cannot be effectively accounted for on our phone and other monitoring systems.

The Service Delivery group needed an effective means of accounting for research or other time spent in supporting cases accounting for productive time that is not being represented in the metrics being reported. Further details on the problem should be addressed to the Service Delivery Department.

Exceptions Tool Interface



1. **Main Toolbar** – Provides buttons to **Add a New Exception** or to **View Reports**.
2. **List Filter** – Allows the user to filter by several fields limiting the records shown.
3. **Status Actions** – Provides a “Select/De-select All” checkbox and status drop down to make bulk changes to the status of listed items. Restrictions apply and are discussed later in this document
4. **Case Exceptions List** – Provides a list of case exceptions from the late 60 days, sorted by the status in the following order: Pending Approval, Active, all else.

Client Usage

Staff members are the only ones who can create a case exception for themselves. Additionally, once created they are the only ones who can stop the “timer” on a record. Other functionality considerations and limitations are noted in this guide.

The policies and procedures on when and why a client uses this tool is outside the scope of this document. For specific information on these topics, please consult your manager or the Service Delivery manager.

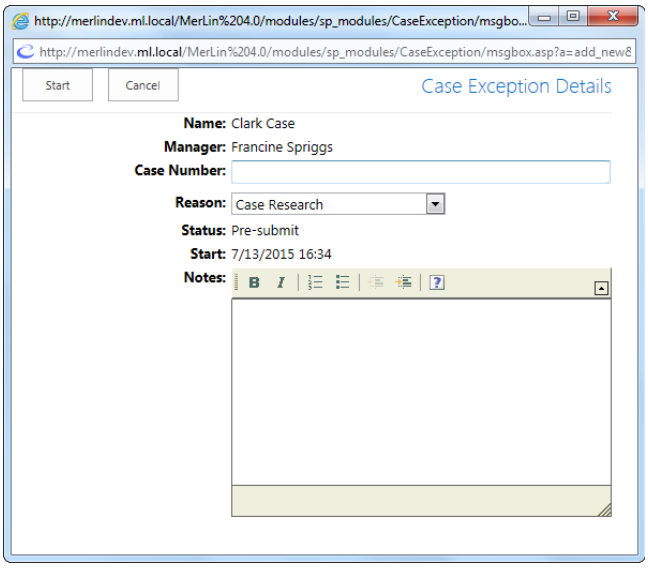
This section will provide specific information on how Technical Support representatives will

enter and manage their specific exception entries.

Creating a Case Exception

To create a record:

- Navigate to the Case Exceptions tool
- Click on the **Add a New Exception** button. The **Add a New Exception** dialog appears.

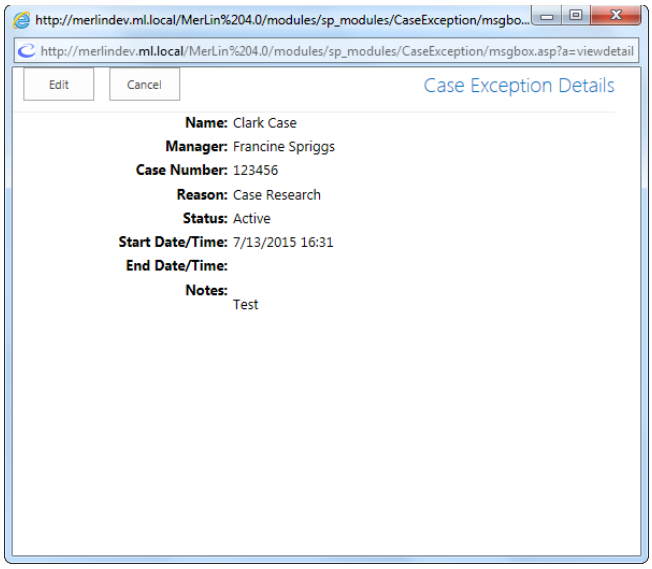


- Enter a **Case Number**.
- Select a **Reason** from the provided drop=down. Options are:
  - Case Research
  - Meeting
  - Project
  - Other
- Provide the applicable **Notes**
- Press **Start** at the top of the dialog. The dialog closes.

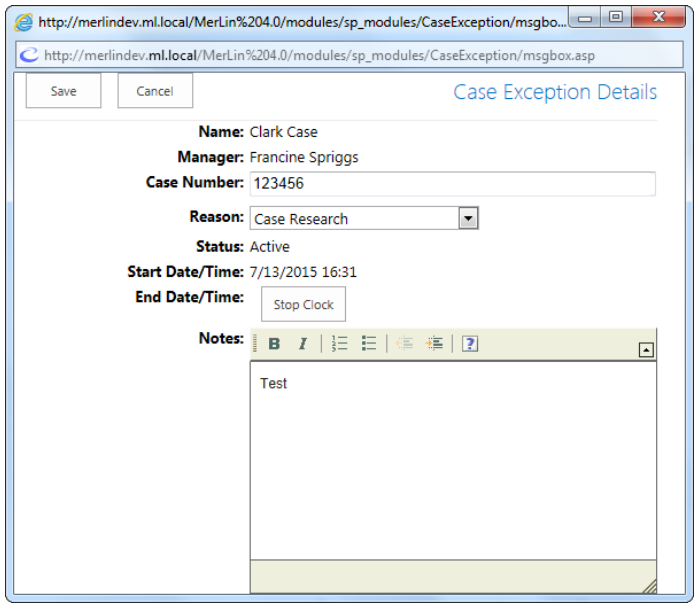
Editing or Completing a Case Exception

To edit a current Case Exception:

- Navigate to the Case Exceptions tool
- Click on the **View** button at the right of the record you want to edit. The dialog appears.



- Press the **Delete** button to delete the record completely.
- Press the **Edit** button to change details or complete the exception record. The dialog enters edit mode



- Change the **Case Number**, **Reason**, or append **Notes** as needed.
- To complete the record, press the **Stop Clock** button.
- Select the **Save Changes** button to commit your changes.

If the exception is being completed, the record will be marked **Pending Approval** and an email will be sent to your direct report manager and a copy will be sent to you. To see the changes updated on the main Case Exceptions page, you must refresh the view.

Manager's Tools

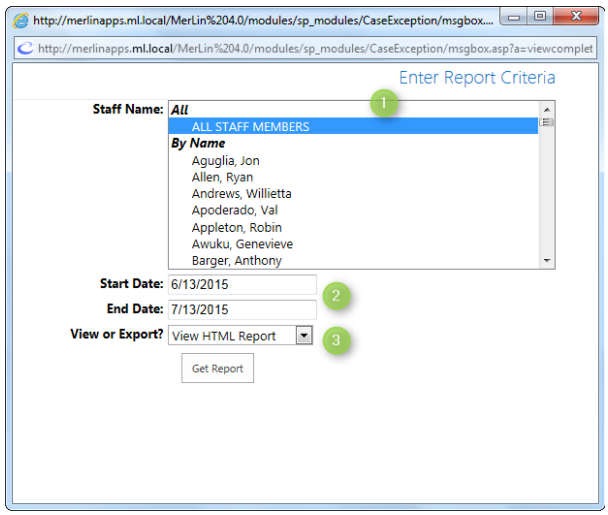
The Case Exceptions tool provides Managers with various functions to manage and report on exceptions created by their staff members. Case exceptions can only be approved by the direct report manager as defined in MerLin.

Each employee has a designated Manager on their profile. This must be properly set by the MerLin development team when the user's profile is created. If a user's report-to manager or department changes, these details must be updated by a member of the MerLin Admin team.

Email notifications generated by this tool draw upon the MerLin staff member database. Email addresses must but up to date for staff members and their defined managers for notifications to work properly.

Viewing and Exporting Reports

The Case Exceptions tool allows management and report-to supervisors to view Approved case exception records for desired date ranges and for all, or selected staff members. This report can be viewed in HTML or exported to an Excel spreadsheet for further work with the data.



1. Select one or more entries in the **Staff Names** field.
(To select multiple entries, hold down the Control button while left-clicking on the entry. if you have "**All Staff Members**" selected, that will take precedent over any other entries you select)
2. Select the **start** and **end** range dates to report on APPROVED entries.
3. Choose to either **view the HTML version** or to **Export to Excel**.
4. A warning dialog stating that the format is not the same as expected. (html being sent as an Excel file) Choose to **Open** anyway.
5. The report will open in Excel. If it does not, minimize all windows as a dialog may have popped up UNDER the active windows.

Approving or Denying a Case Exception

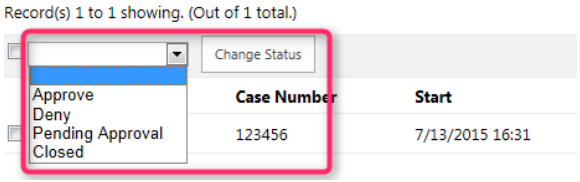
Case exceptions can be denied when in any status. An approval cannot be applied to a record that does not have a **End Date** as the record is still in active status.

- Navigate to the Case Exceptions tool
- Click on the **View** button at the right of the record you want to edit. The dialog appears.
- Change the **Case Number**, **Reason**, or append **Notes** as needed.
- Change the **Status** drop down.
- Change or adjust the Start Date /Time or End Date / Time as needed. The End Date field are only available on completed exceptions when the clock is stopped by the staff member.
- Press the **Save** button. Close the dialog and refresh the main Case Exceptions page to see the updated list.

Bulk Status Changes

To make a change to the status of seveal case exceptions:

- Check the **Select All** check box, or multiple check boxes from the list
- Drop down the **Status** drop down selector.
- Press **Change Status** to commit the change.
- As long as the persons is the client's manager/report to then the record will be updated



Note:
The status of an exception can only be changed through the bulk tools if:

1. The manager of the record/staff matches the user making the change.
2. The case exception has both a start and end date.