Amazon Home Page

Quick Start Guide

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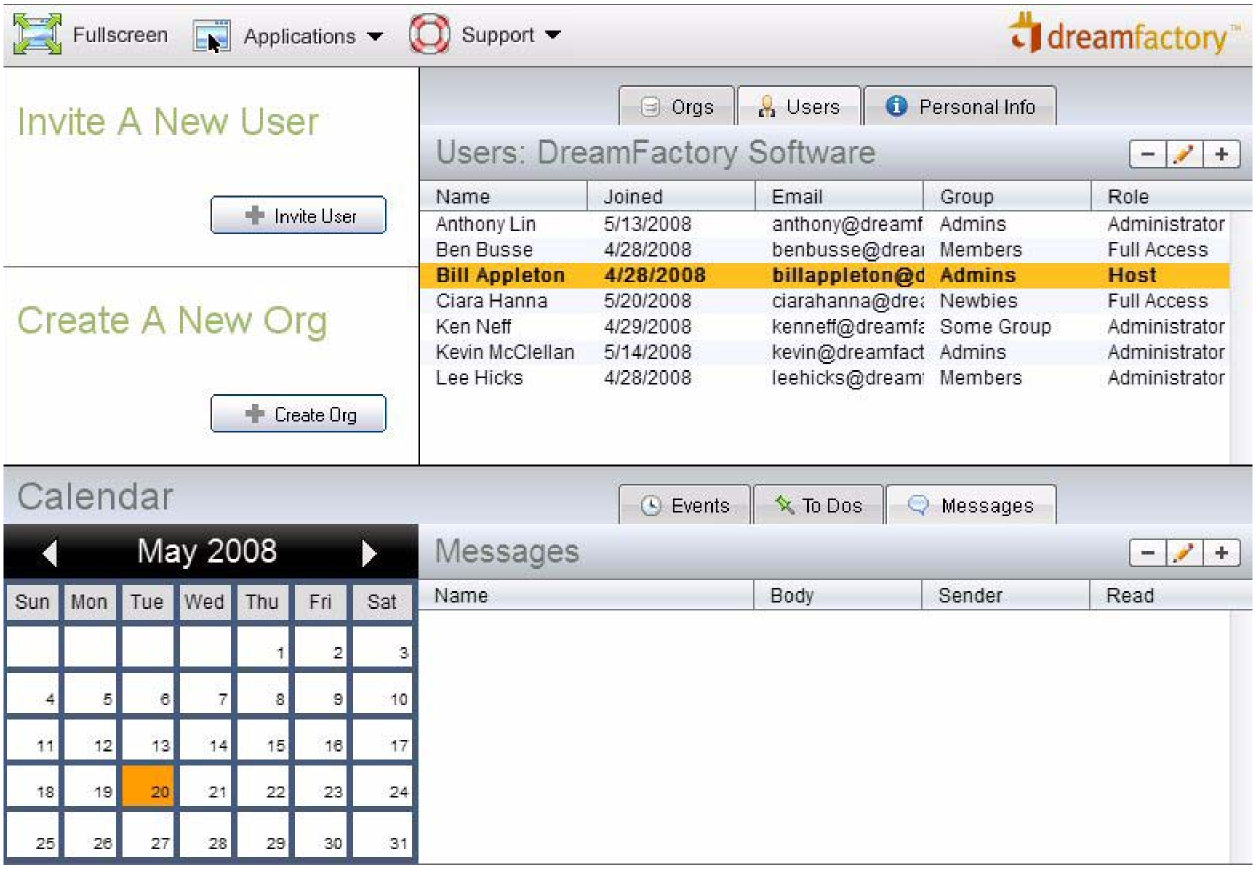
Amazon Home Page Overview

The **Home Page** is the central hub for managing your DreamTeam implementation. The **Home Page** allows you to create new **Orgs**, invite new users to those Orgs, and manage your Calendar as well as creating **Events, To Do's** and **Messages**. This guide takes you step by step through a variety of common scenarios utilizing the **Amazon Home Page**.



DreamTeam Definitions

Let's look at some of the commonly used terms and definitions you will encounter when you use the **Amazon Home Page**.

- **Org (Organization)** - contains groups of **Users** collaborating together on projects within DreamTeam.
- **User** - is someone who is a member of an Org and participates on a project team. Users can also be assigned to a **Group**.
- **To Do -** is a simple task assigned to a **User** which will appear on the **User's Home Page** under the **To Do's** section. A **To Do** is not the same as a project task.
- **Events** - a meeting that **Users** are assigned to. All **Events** appear on the **Home Page** under the **Events** section.
- **Messages** - Threaded discussions that allow Project Teams to collaborate as a group regarding specific

projects, tasks or documents. All **Messages** appear on the **Home Page** under the **Messages** section.

- **Groups** - are created as a means of managing multiple users collectively and more efficiently. For example, you can use a group when sending out a notification email. This allows you to notify the Group without having to add them to the notification individually.

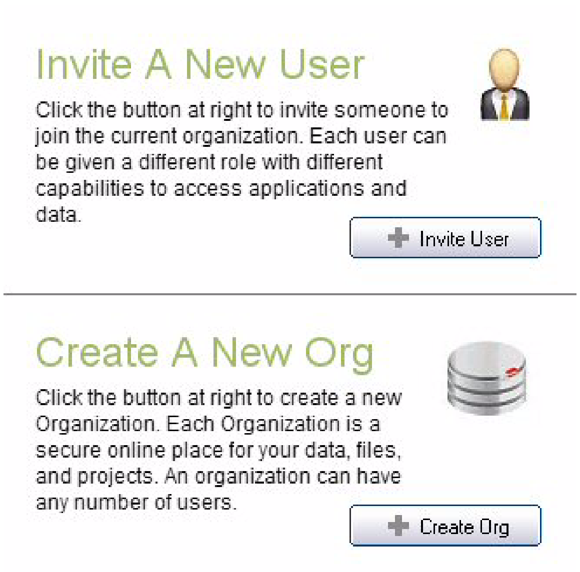
- **Role** - determines what type of access a User has in an Org and what privileges they have been assigned.

Home Page Use Cases

How to Create a New Org

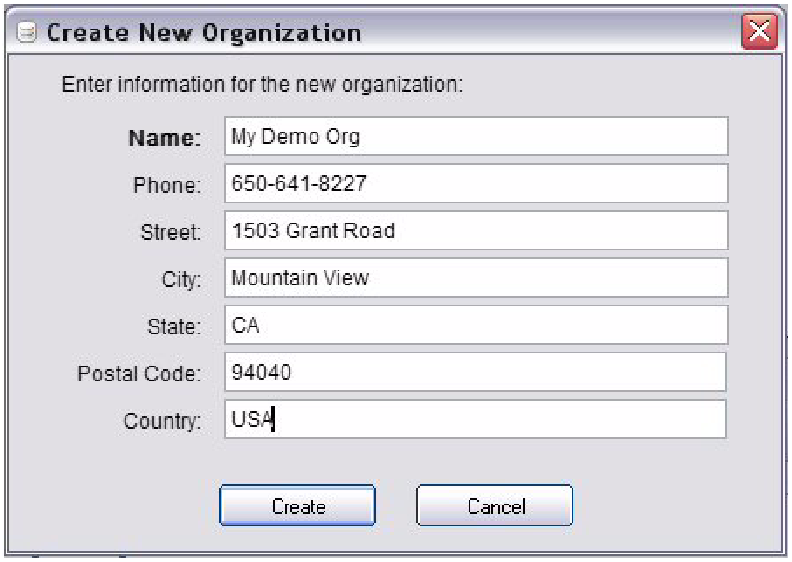
Before you get started using **Amazon Home Page**, you need to create a new **Org**. To create a new **Org**, follow these steps:

1. Click **Create Org**.

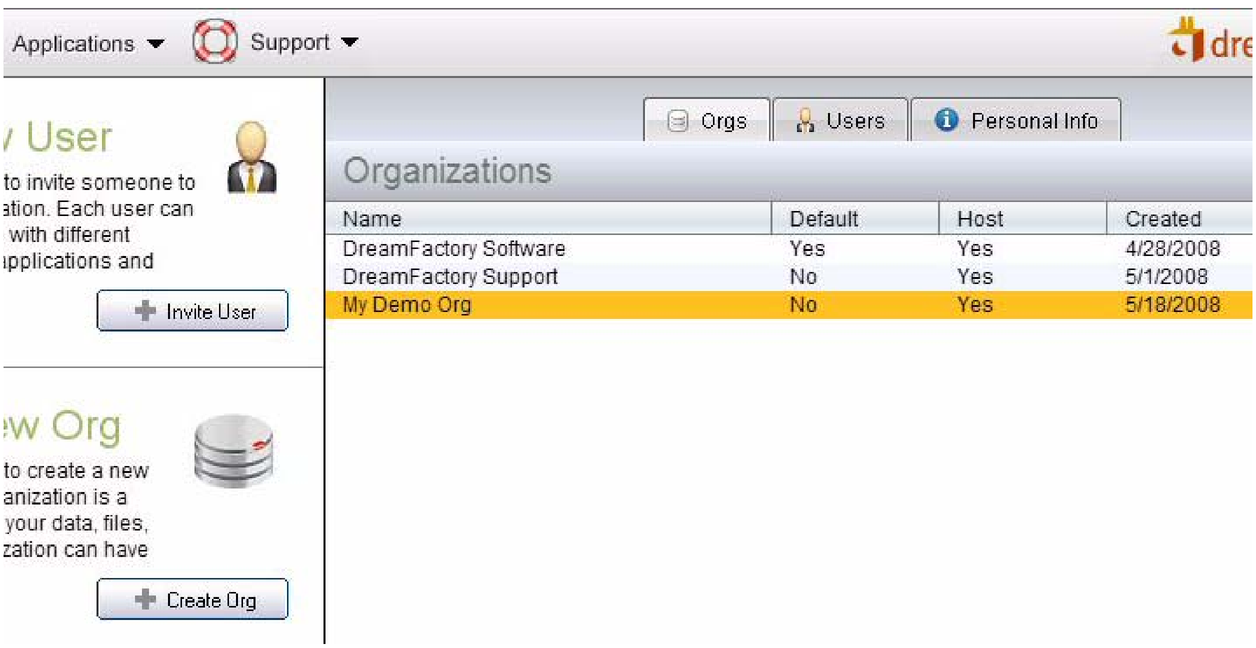


   The **Create New Organization** dialog box is displayed.

2. Enter all the information about the new Org in the **Create New Organization** dialog box. Only the **Name** field is mandatory.



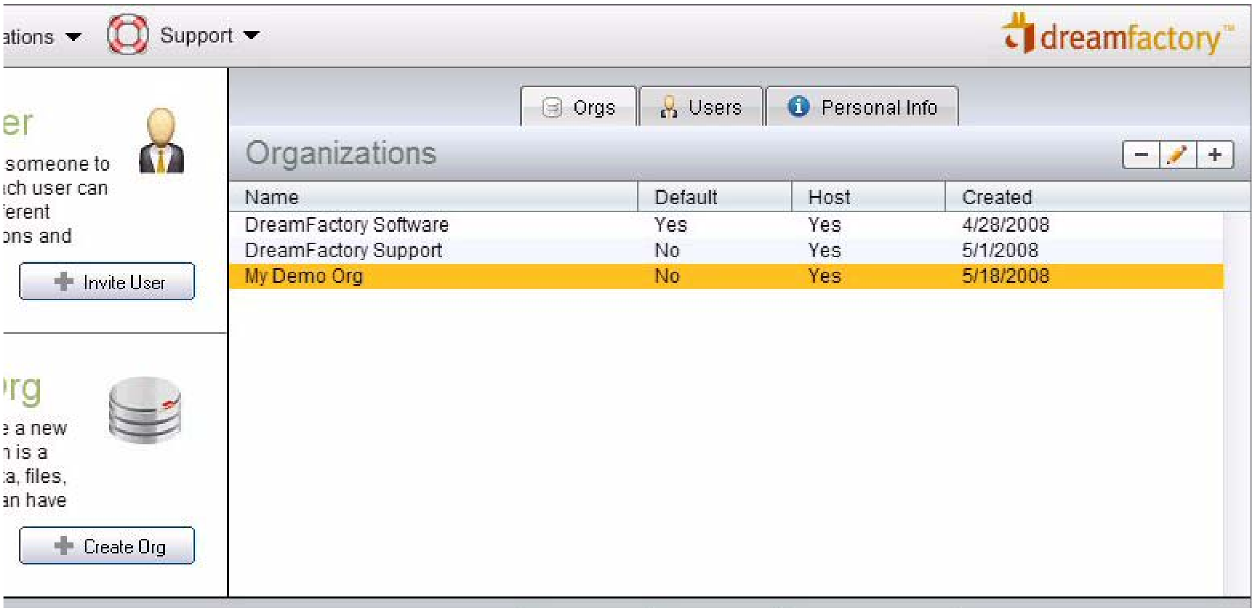
3. Click **Create** to save the information you just entered and create the new Org. The new **Org** appears highlighted in the **Organizations** section of the **Home Page**.



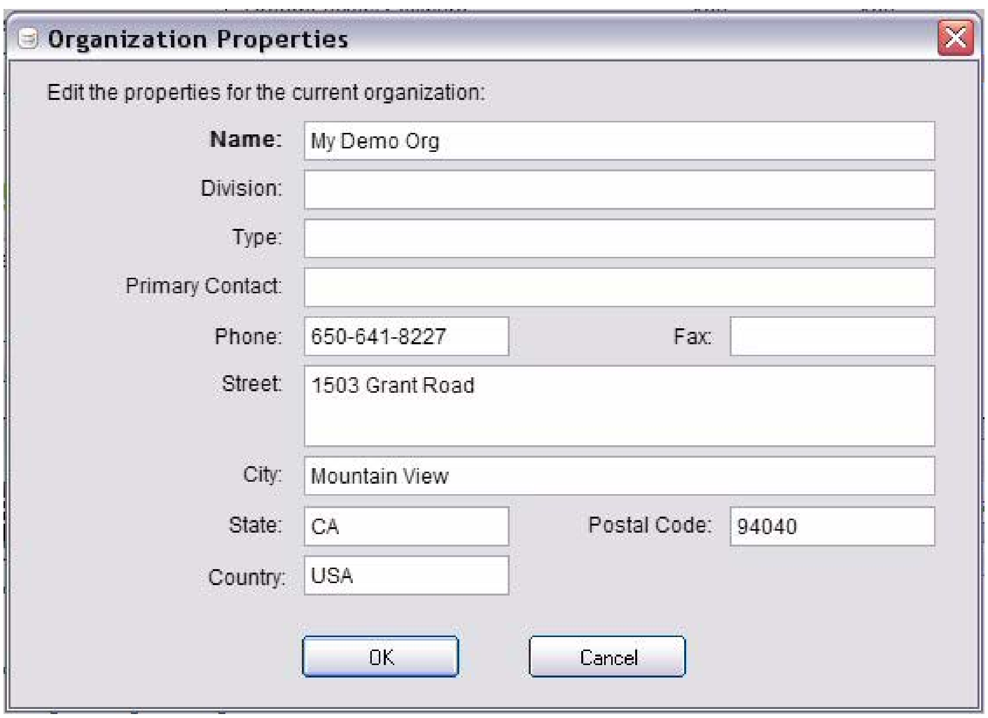
How to Edit Org Properties

All of your **Orgs** appear listed in the **Organizations** section at the top of the **Home Page**. At some point you may need to edit the properties of an Org you have already created. To edit the properties of an existing Org, follow these steps;

1. From the **Organizations** list, select the **Org** you want to edit.



2. Click the **pencil** icon in the right hand side of the screen. The **Organization Properties** dialog box is displayed.

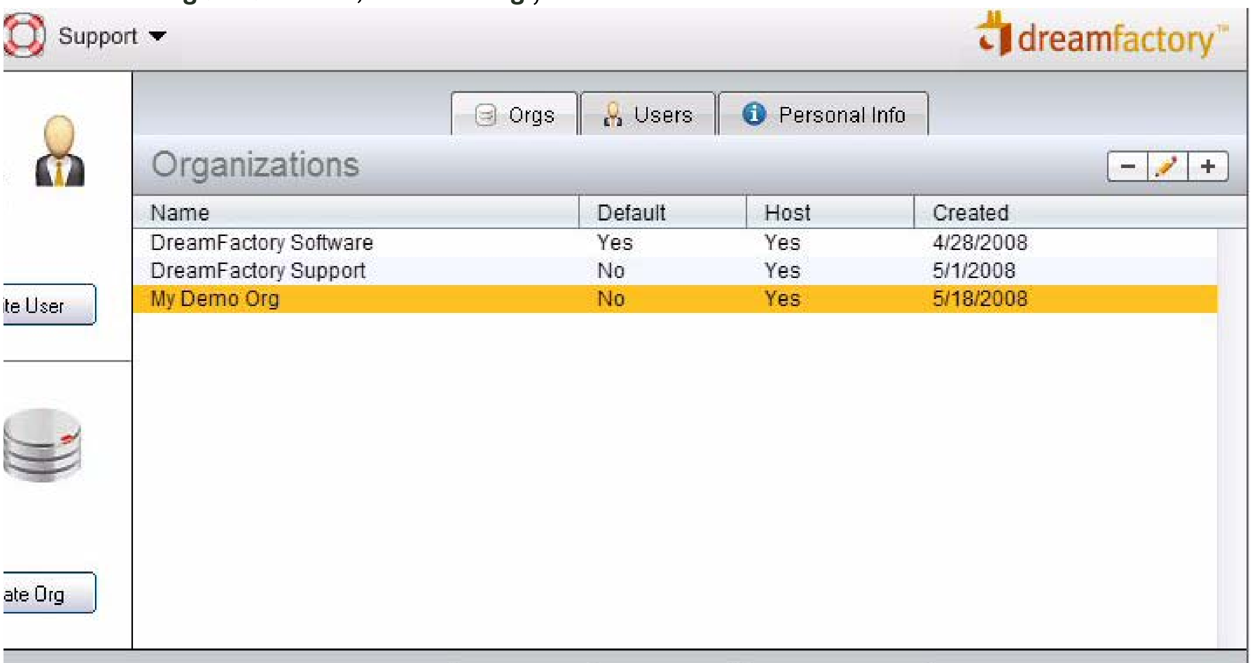


3. Make all necessary changes to the **Organization Properties** and click **OK**. Any changes you made will be saved to the original **Org**.

How to Archive an Org

You may want to archive an Org in DreamTeam. To archive an **Org**, follow these steps;

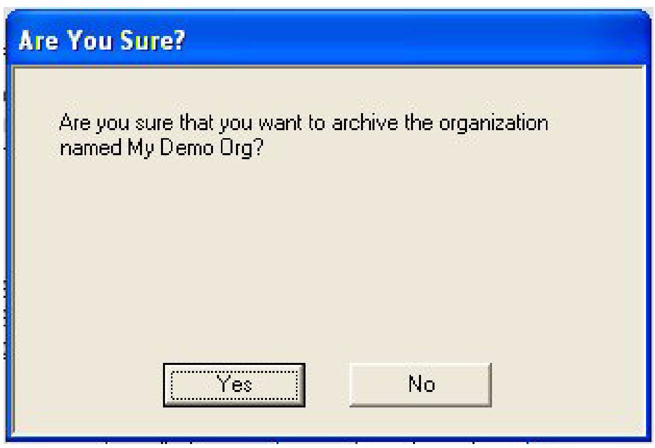
1. From the **Organizations** list, select the **Org** you want to archive.



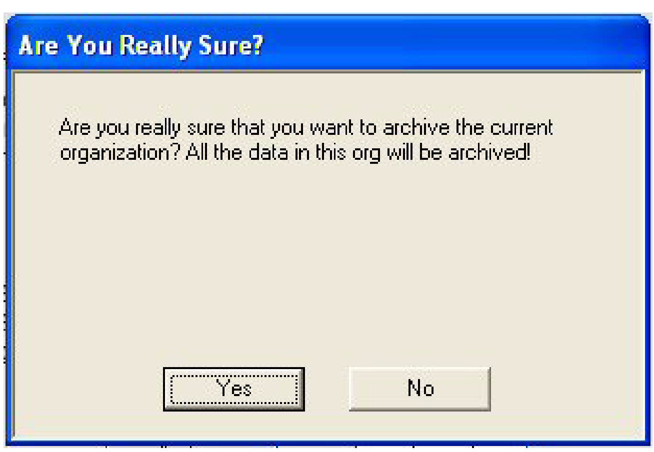
2. Click on the **Minus (-)** icon on the right hand side of the screen. The **Archive or Delete** dialog box is displayed.

3. Select the **Archive this org and all data (host or admin)** radio button.

4. Click **Archive**. The **Are You Sure?** dialog box appears to check you are sure you want to archive the **Org**.



5. Click **Yes** to confirm you want to archive the **Org**. A second dialog box appears to confirm you want to archive the **Org**.



6. Click **Yes** to confirm you want to archive the Org.

How to Delete an Org

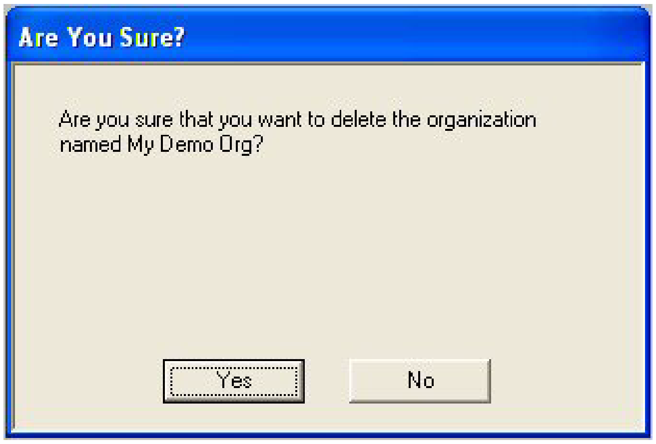
You can delete any Orgs from the **Home Page**. To delete an Org, follow these steps;

1. From the **Organization** list, select the **Org** you want to delete.

2. Click on the **Minus (-)** icon on the right hand side of the screen. The **Archive or Delete** dialog box is displayed.

3. Select the **Delete this org and all data (host only)** radio button.

4. Click **Delete** to delete the Org and all associated data. A dialog box appears to check you are sure you want to delete the Org.

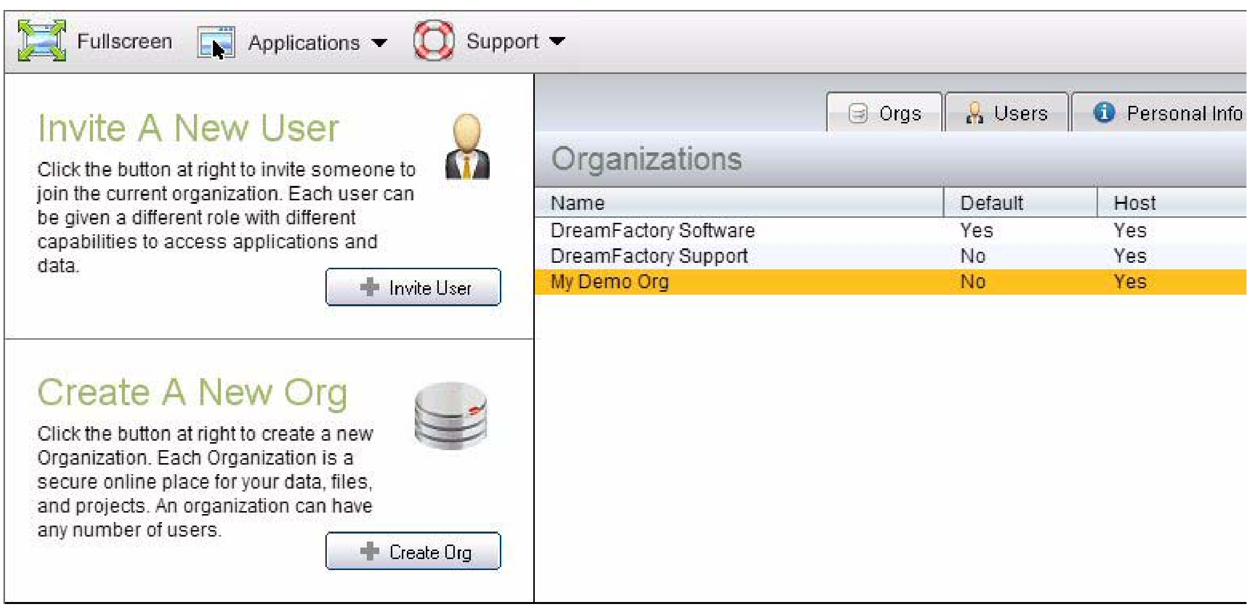


5. Click **Yes** to confirm you want to delete the existing **Org**. The **Org** is removed from the Organizations list.

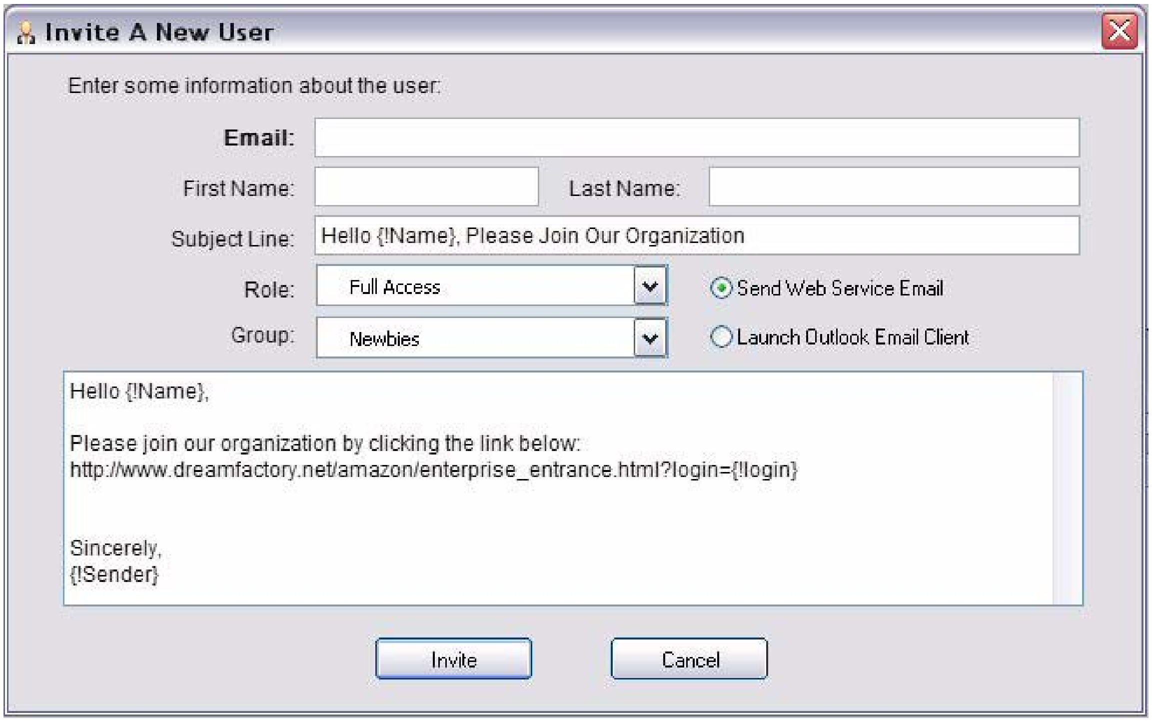
How to Invite New Users

Once you have created your new Org, you can invite new Users to join it. Follow these steps to invite new users to the Org you just created.

1. From the **Organizations** list, select the **Org** you want to invite new users to join.



2. Click **Invite User**. The **Invite New User** dialog box is displayed.



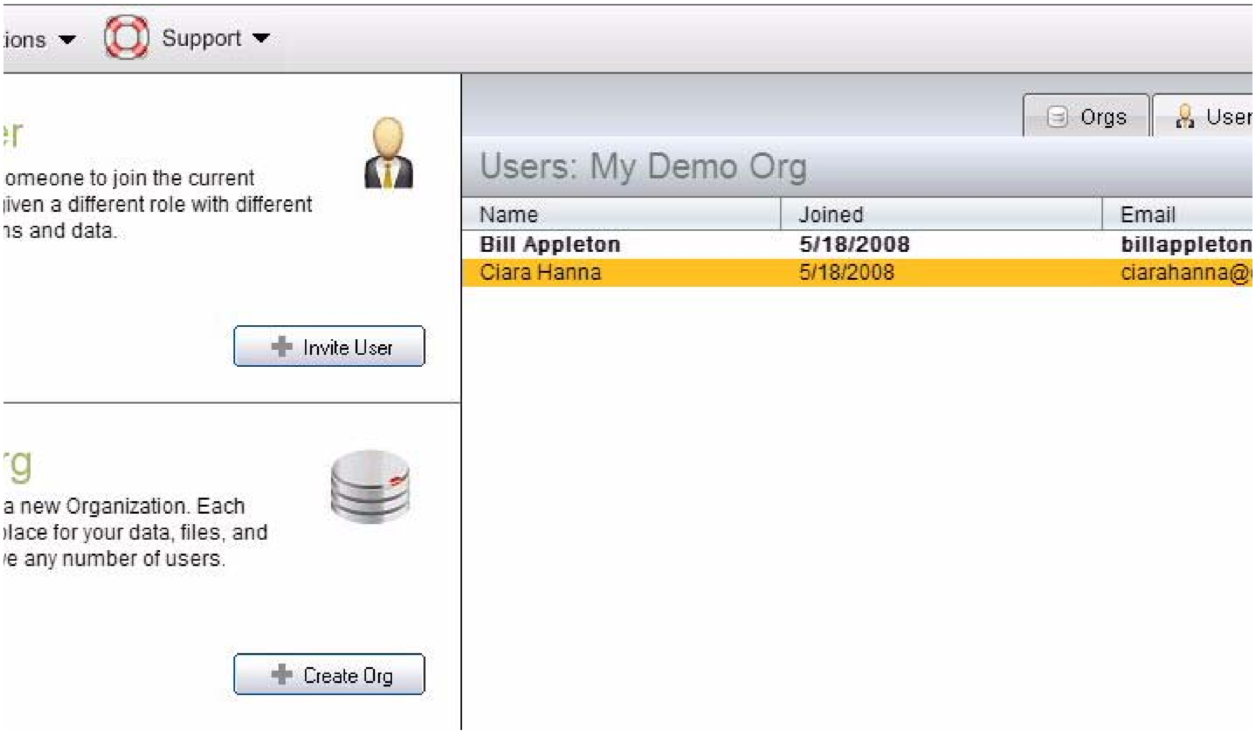
From here you can configure all the information contained in the invite to the user.

Field	Description
Email	Enter the email address of the user you want to invite to the Org.
First Name/Last Name	Enter the first name and last name of the user in the **First Name** and **Last Name** fields.
Subject Line	Enter the message that will appear in the subject line of the email. This field is populated by default, but you can edit this message.

Field	Description
Role	Select the role the user will have in the new Org. You can choose from: • **No Access** - The user cannot access any features in DreamTeam • **Read Only** - The user can only read data in DreamTeam • **Read and Create** - The user can read and create data in DreamTeam • **Read and Update** - The user can read and update data in DreamTeam • **Read, Create and Update** - The user can read, create and update data in DreamTeam • **Full Access** - The user can read, create, update and delete data in DreamTeam • **Administrator** - The user can edit user properties, edit Org properties, delete users, invite new users to the Org, archive Orgs, read, create, update and delete all data. **Note:** The Administrator role is not available on the Professional version of DreamTeam. In addition to the default roles, you can also create custom roles. For more information, see How to Create Custom User Roles.
Group	Select the **Group** to which you want to add the member. You can choose from; • Admin • Newbies • Members In addition to the three default groups, you can also create custom groups. For more information, see How to Create Custom User Groups.
Send Web Service Email	Select this option if you want to send the email invitation through the DreamTeam application.
Launch Outlook Email Client	Select this option if you want to send an email with adjoining instruction from your Outlook client.
Display Panel	The default email message is displayed in this panel. You can edit the entire message as required.

3. When you have completed the dialog and are ready to send the email invites, click **Invite**. An invite is sent to the named user.

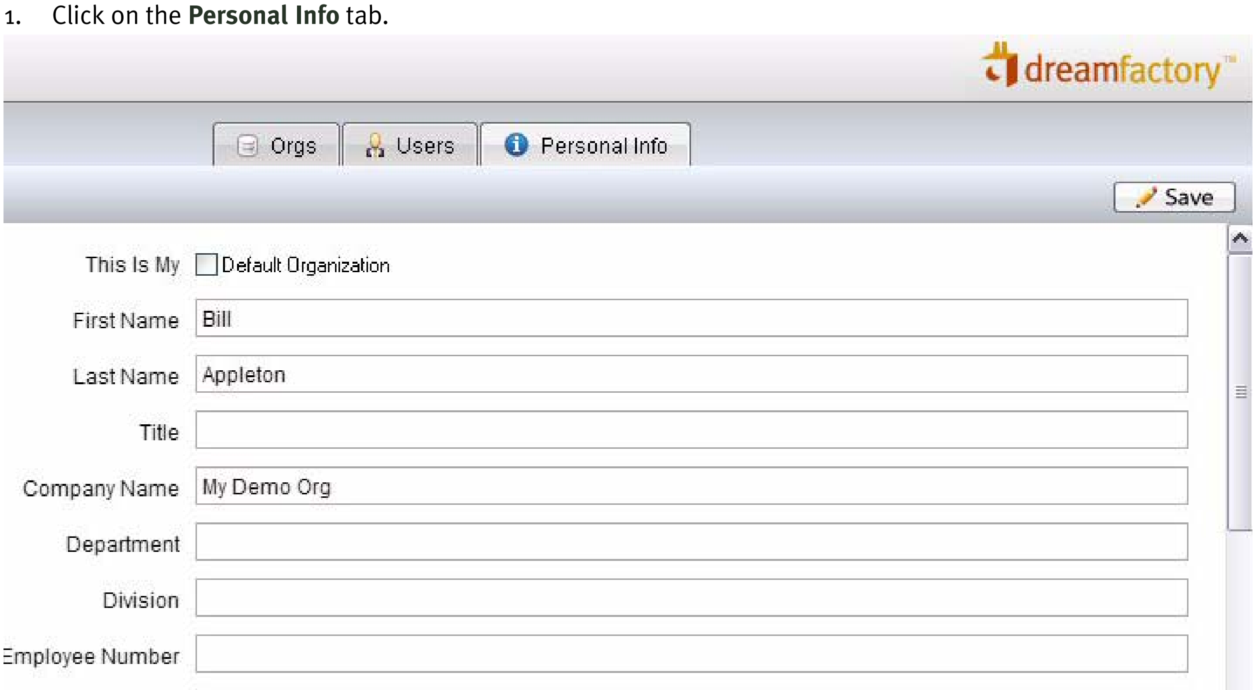
When the User clicks on the URL in the invite email, they will be directed to a login screen where they can register to join the Org. Once they register they are automatically added to the Org and their name will appear listed in the User section on the **Home Page**.



How to Edit Personal User Information

After a User has been added to an Org, they can edit their personal information. To edit personal user information, follow these steps;

1. Click on the **Personal Info** tab.

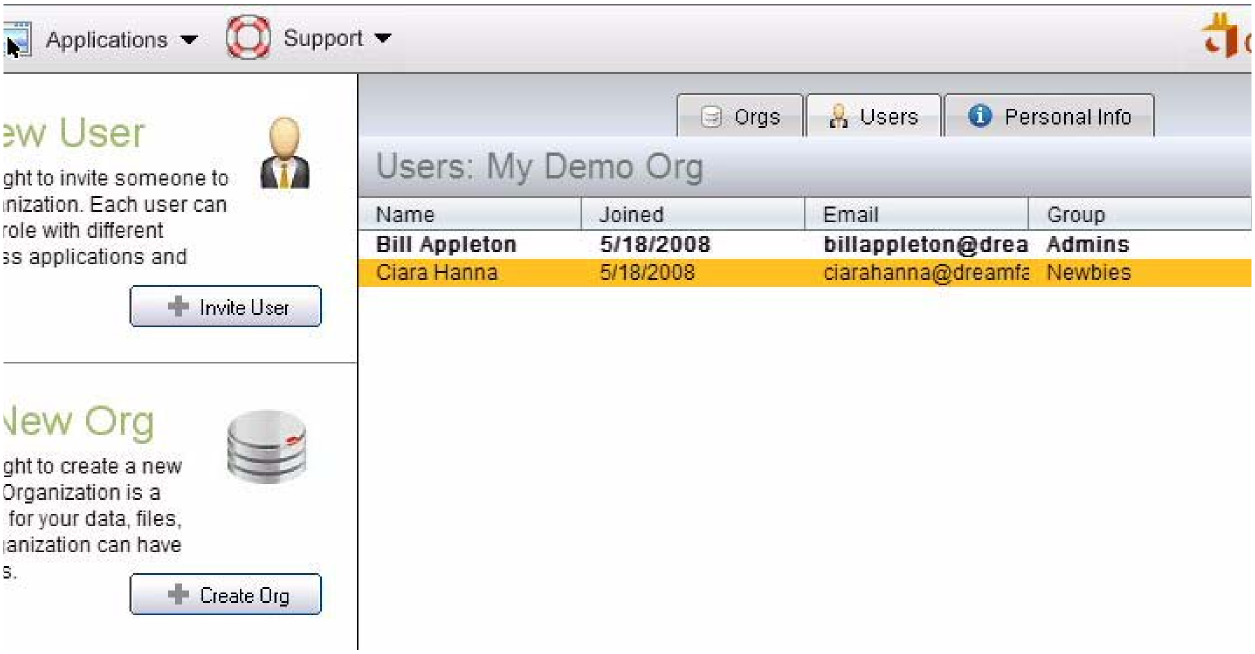


2. Update any information in the appropriate information fields and click **Save**.

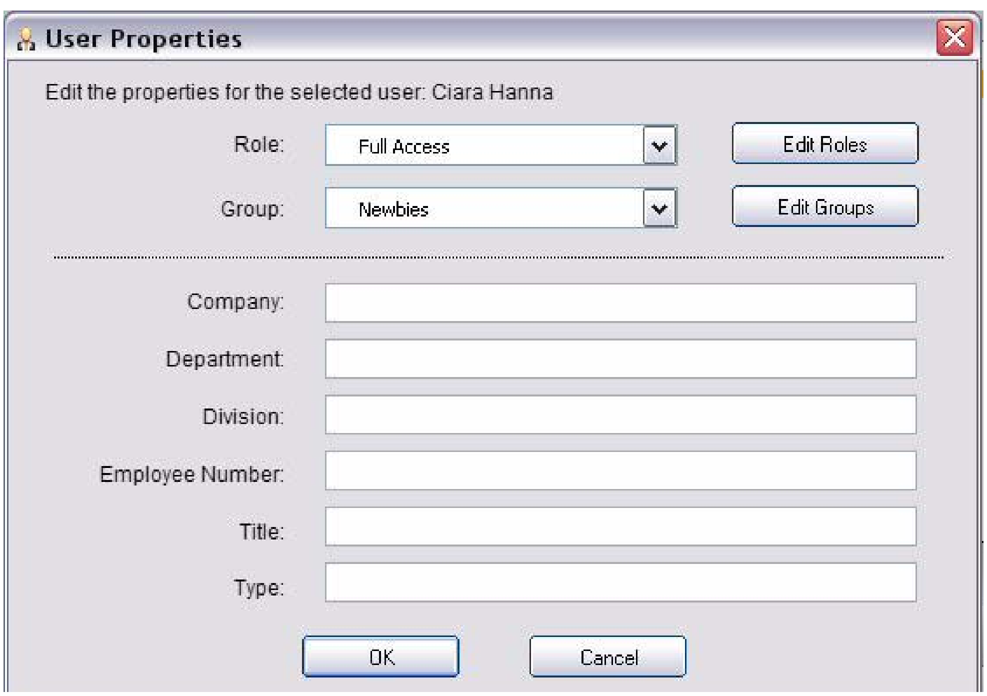
How to Edit User Properties

If you have appropriate privileges you can edit the properties that have been assigned to other users. You can assign different roles to a user and change the group they belong to. To edit user properties, follow these steps;

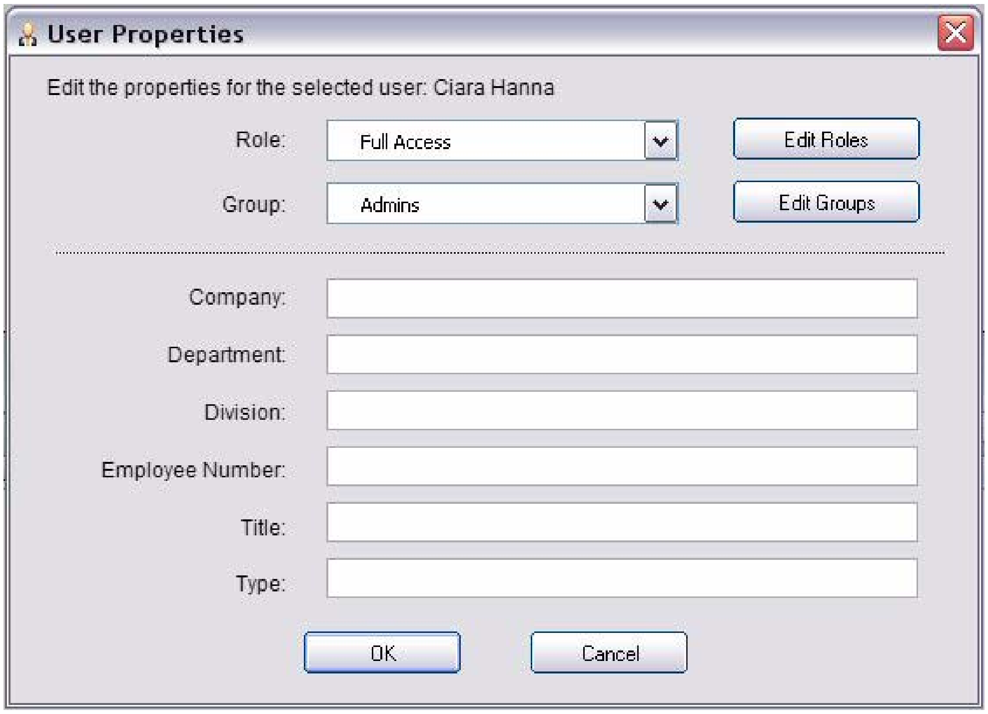
1. Select the **User** you want to edit from the **Users** list.



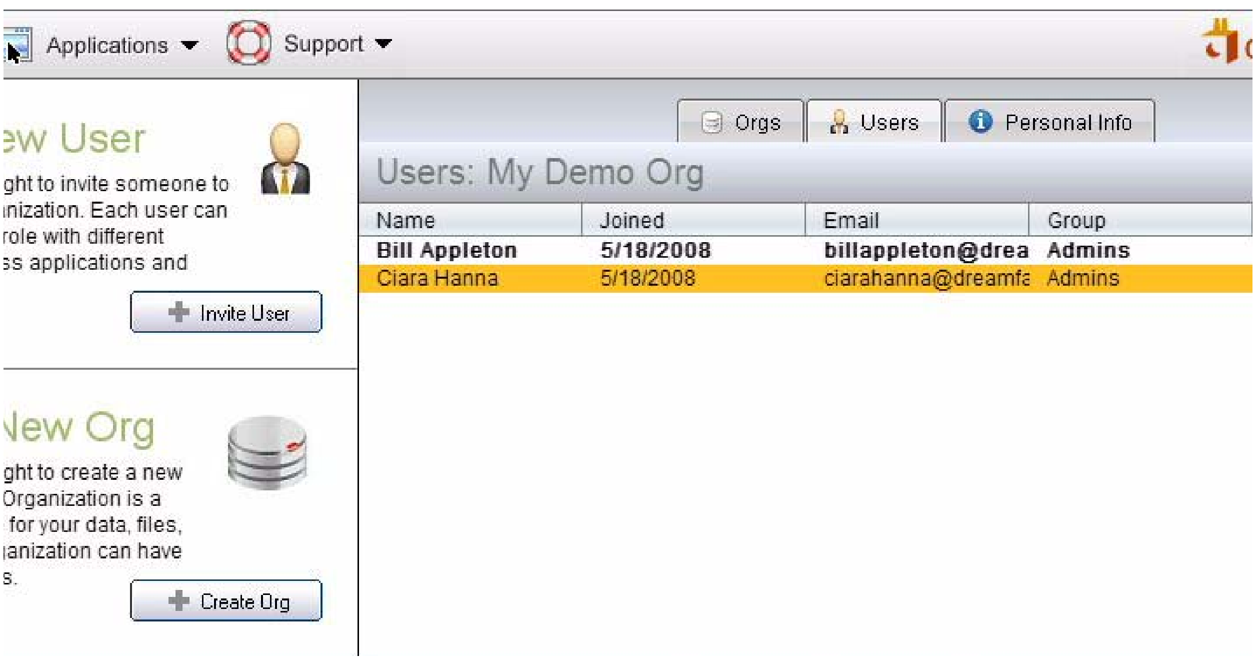
2. Click the **Pencil** icon. The **User Properties** dialog box is displayed.



3. From the available drop-down lists, select a different **Role** or a different **Group**. You can also edit the personal information of the user.



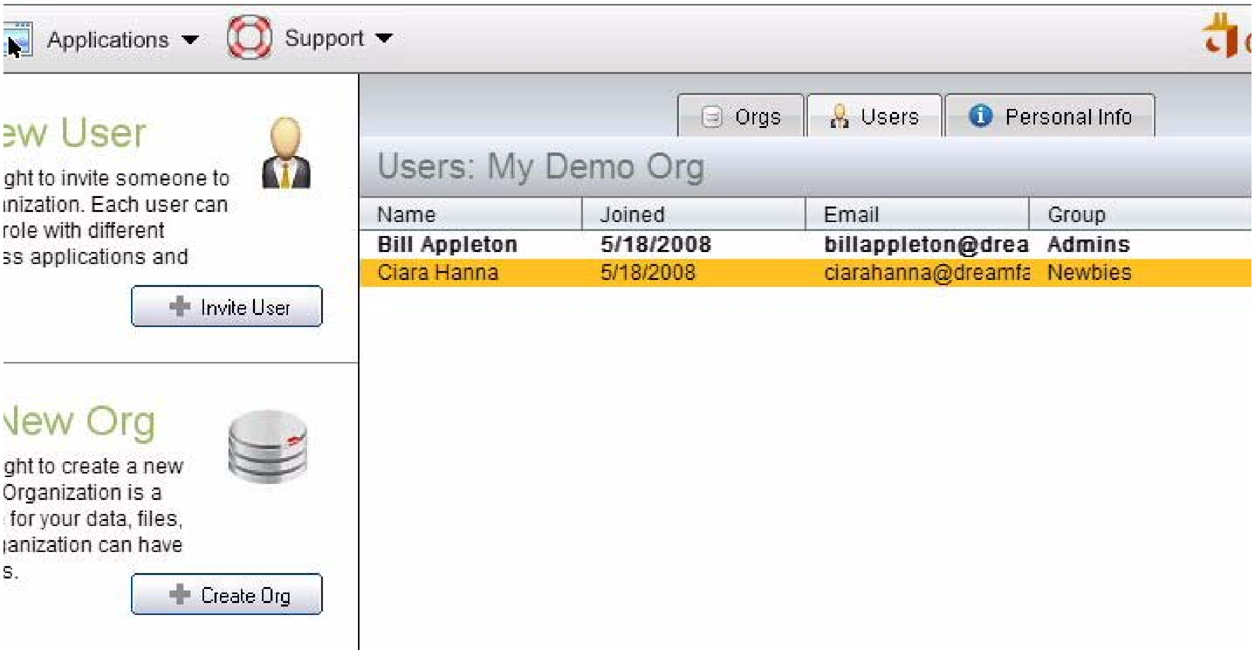
4. Click **OK** to save the changes to the user properties. The changes you make can be seen on the User display list.



How to Create Custom User Groups

There are three default user groups in DreamTeam; **Admins**, **Newbies** and **Members**. You can add to this list by creating your own custom user groups in DreamTeam and assigning users to those new groups. To create your own new custom group, follow these steps:

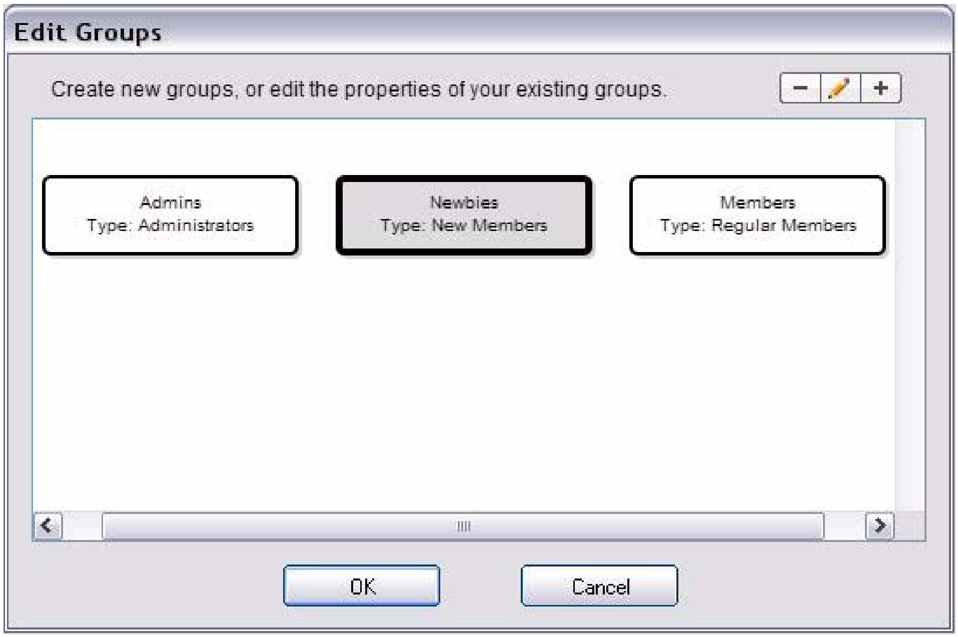
1. Select a **User** from the Users list.



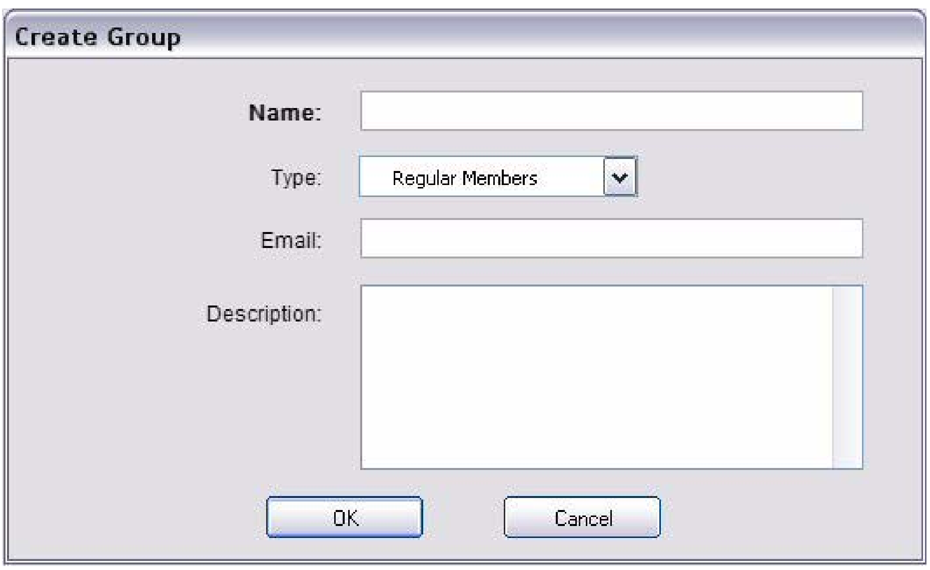
2. Click on the **Pencil**. The **User Properties** dialog box is displayed.

3. Click **Edit Groups**. The **Edit Groups** dialog box is displayed.

   The three default DreamTeam groups are displayed in bubbles in the dialog box. The bubble shaded in gray is the group the current selected user is assigned to.



4. Click the **Plus** (**+**) icon to add a new group. The **Create Group** dialog box is displayed.



5. Type a new name for the group in the **Name** field. This field is mandatory.

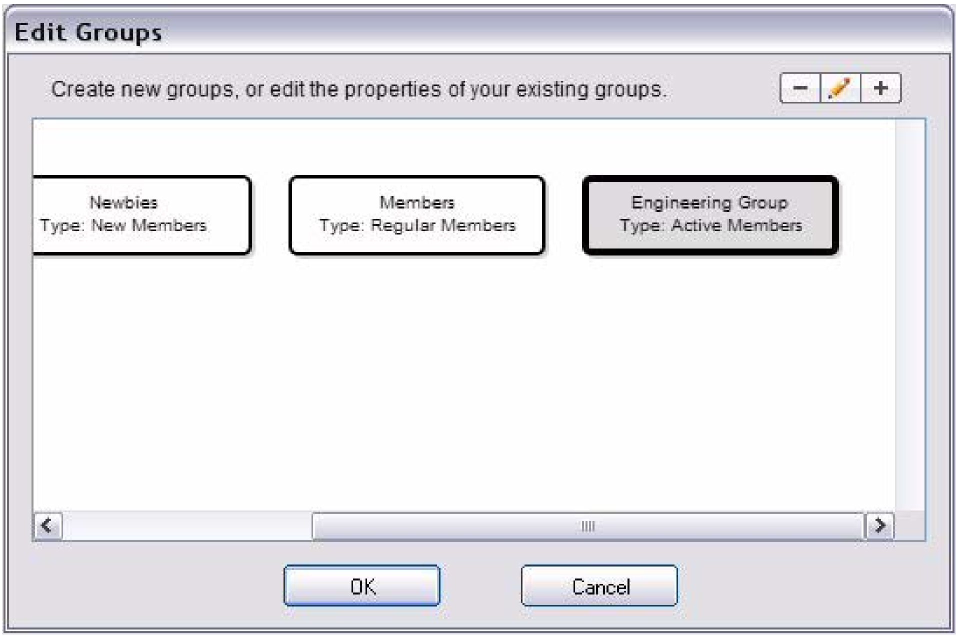
6. Select a group **Type** from the drop-down list. You new group will inherit the properties of the default types. There are 5 different types of groups you can create;

   - Administrators
   - New Members
   - Regular Members
   - Active Members
   - Inactive Members

7. Enter an email address for the group. This is not a mandatory field.

8. Enter a description for the group. This is not a mandatory field.

9. Click **OK** to save the properties of the new group. The new group appears in a bubble on the **Edit Groups** dialog box.

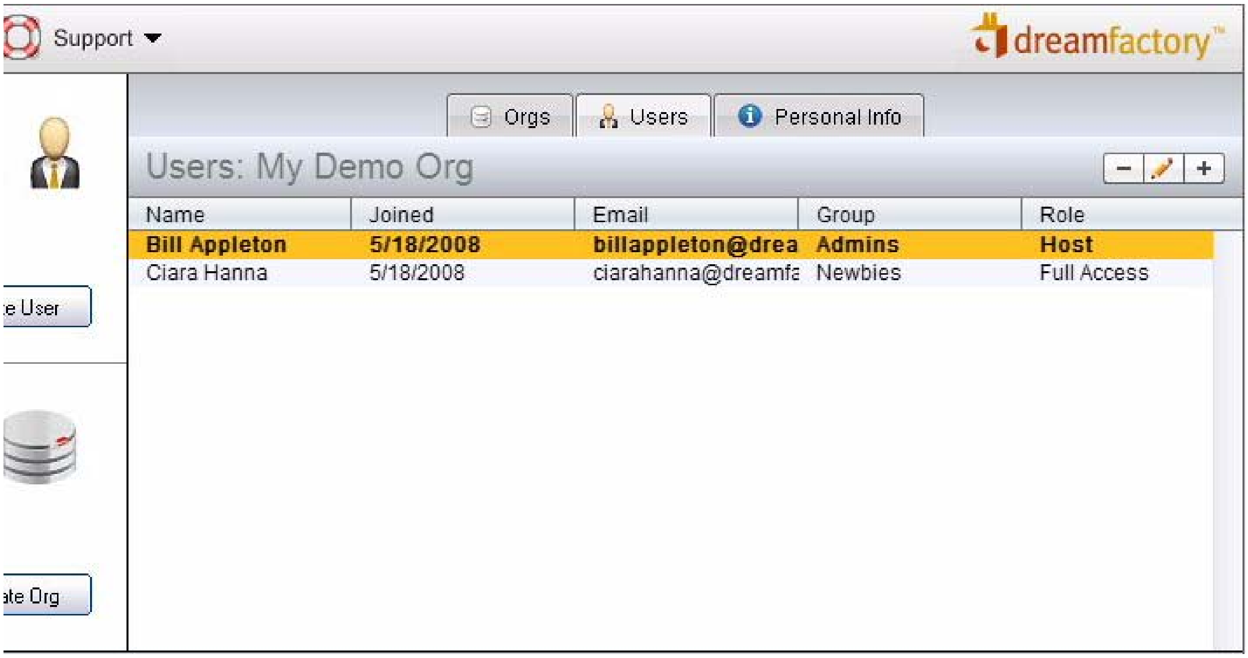


10. Click **OK** to close the **Edit Groups** dialog box. The new group is now a selectable option from the drop-down list. Users can now be easily added to the ’Engineering Group’.

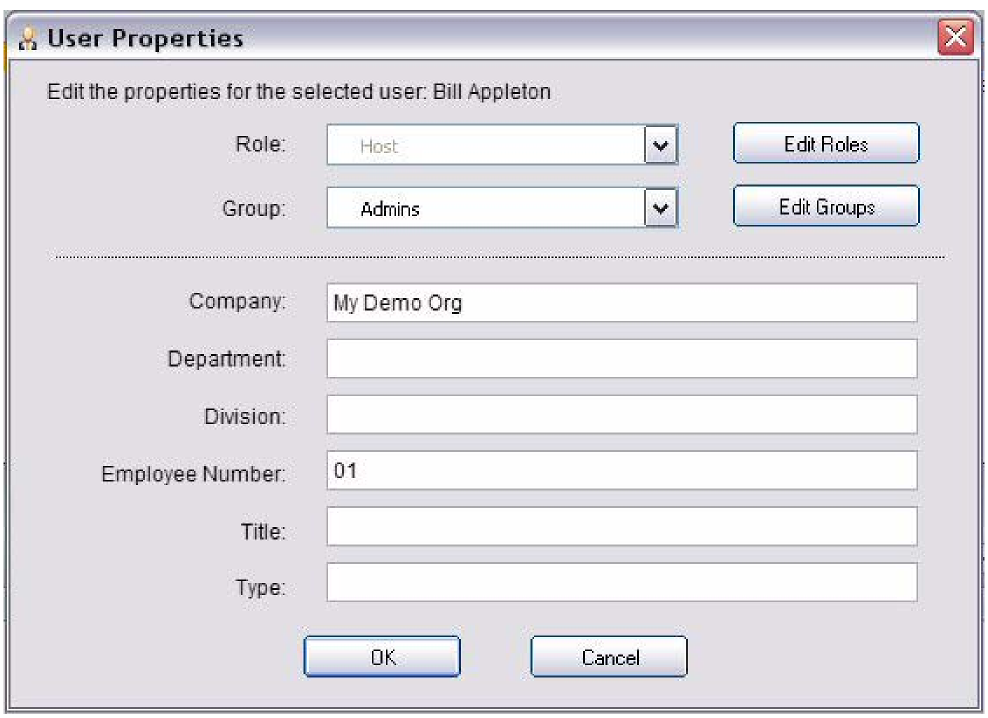
How to Edit a Custom User Groups

After you have created a group, you may want to edit the properties of that group. You cannot edit the properties of a default group. To edit the properties of an existing user group, follow these steps.

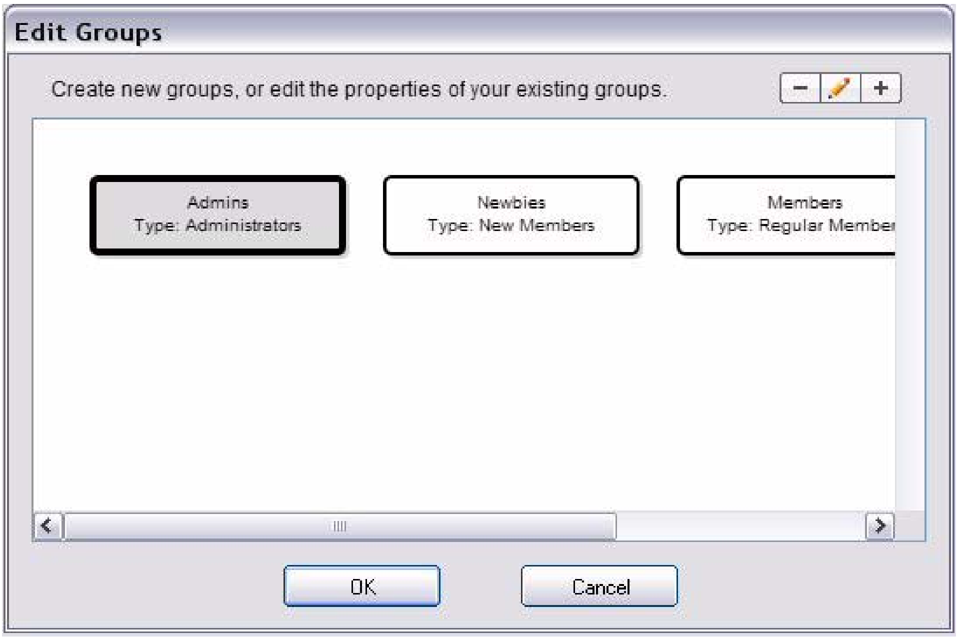
1. Select a **User** from the Users list.



2. Click on the **Pencil** icon. The **User Properties** dialog is displayed.



3. Click **Edit Groups**. The **Edit Groups** dialog box is displayed.



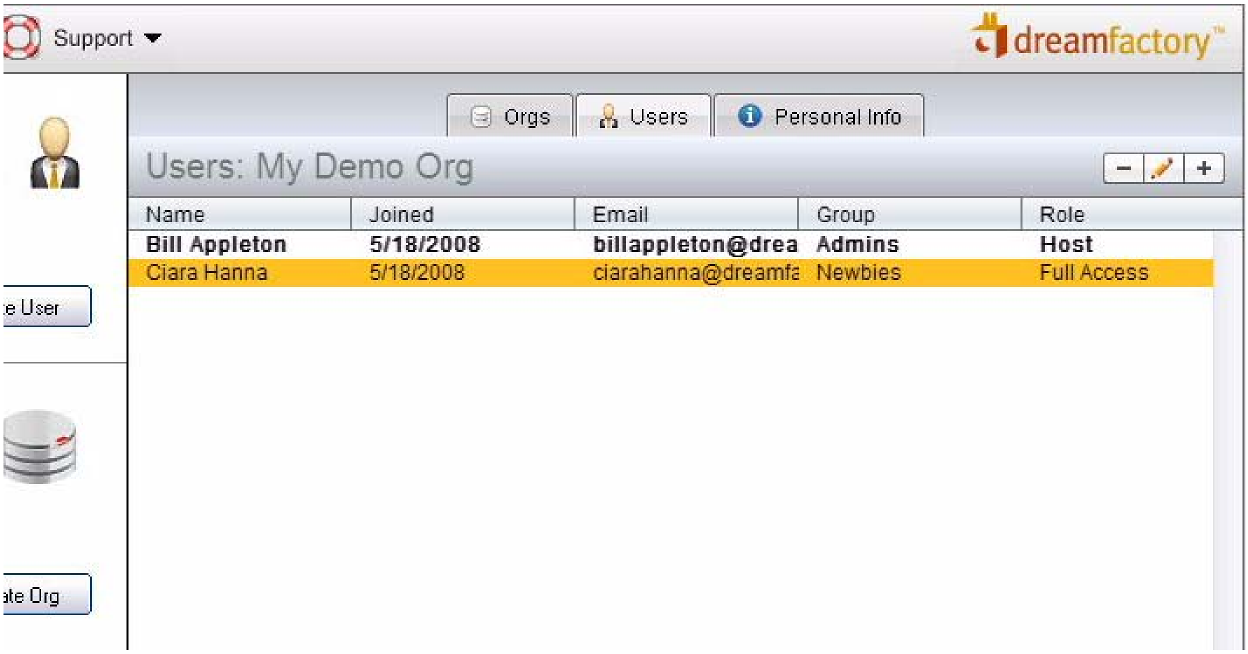
4. Select the **Group** you want to edit and click the **Pencil** icon. The **Group Properties** dialog box is displayed.

5. Make any necessary changes to the properties of the group in the dialog box and click **OK**. Your changes are saved to the Group.

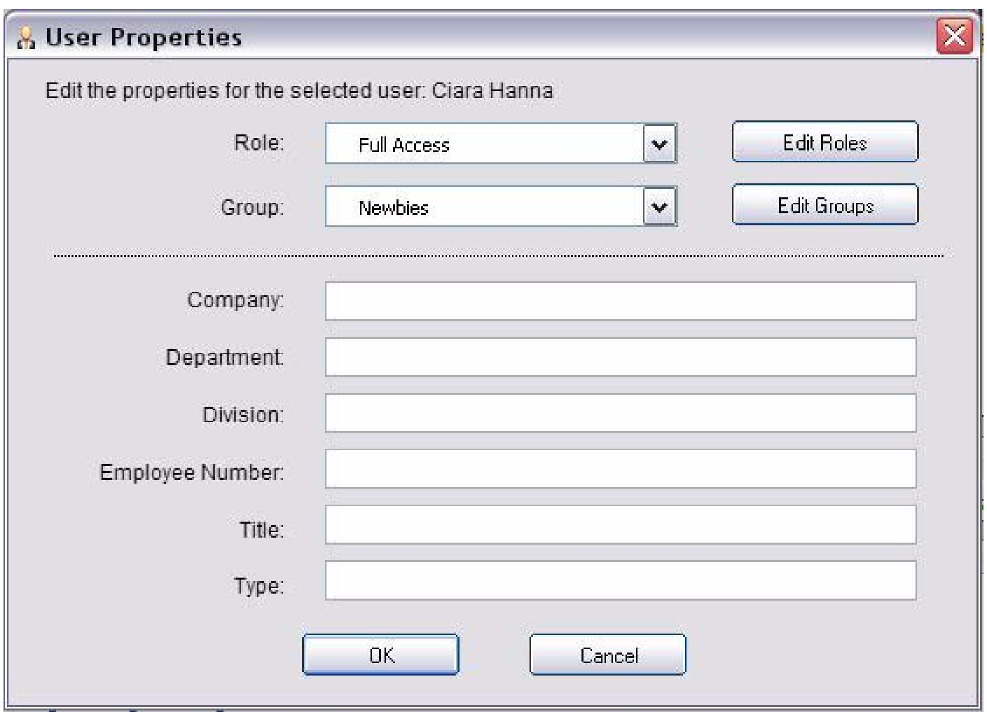
How to Delete a Custom User Group

You may need to delete a custom user group that you previously created. You cannot delete a default admin, newbie or members group. To delete a custom user group, follow these steps;

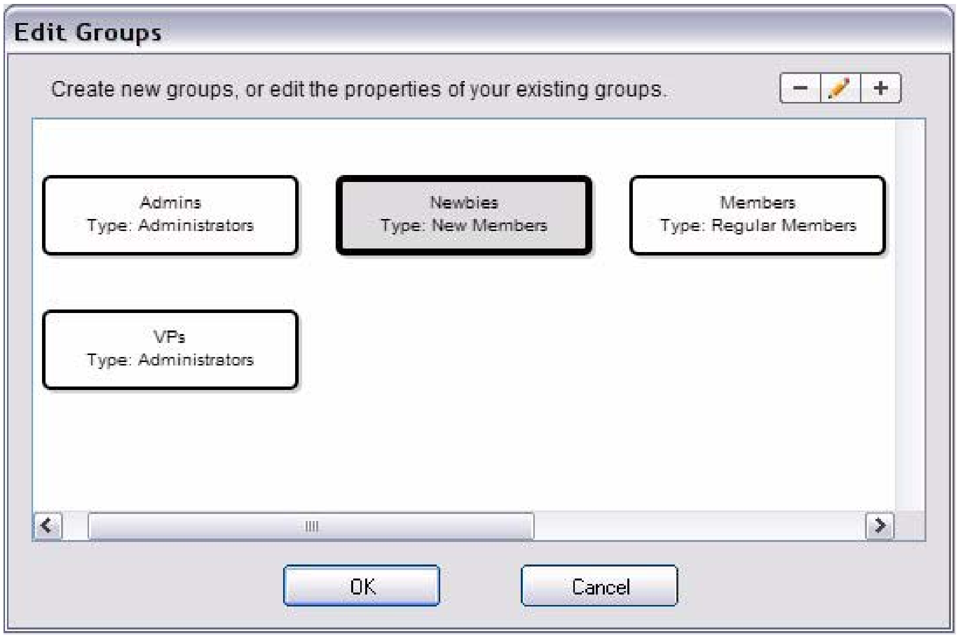
1. Select a **User** you want to delete from the Users list.



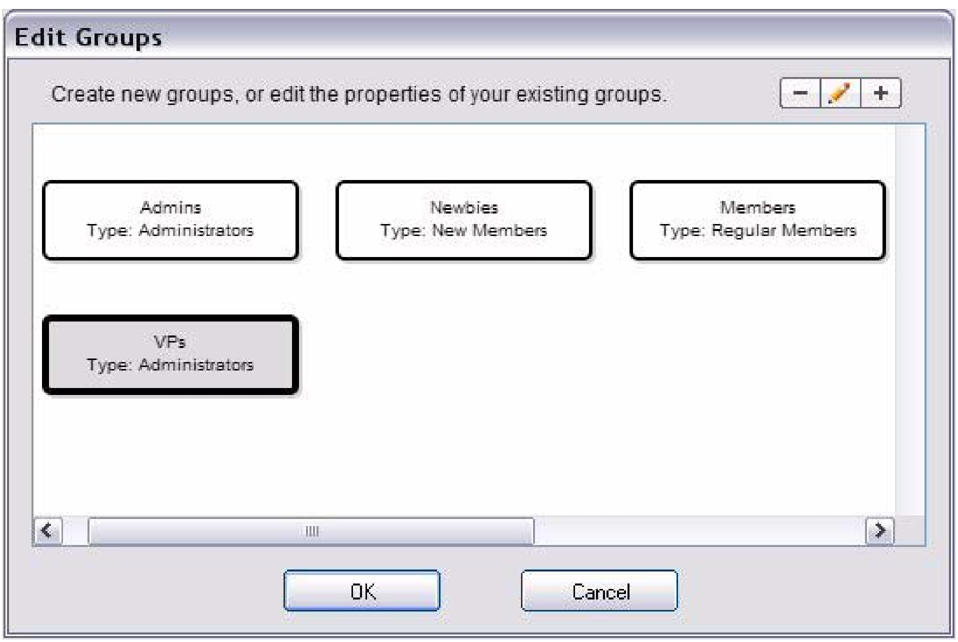
2. Click the **Pencil** icon. The **User Properties** dialog box is displayed.



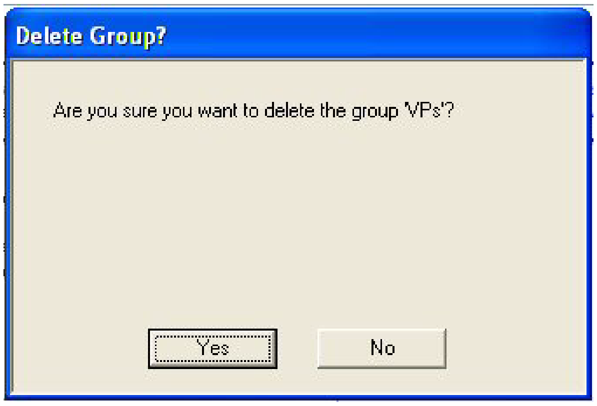
3. Click the **Edit Groups** button. The **Edit Groups** dialog box is displayed.



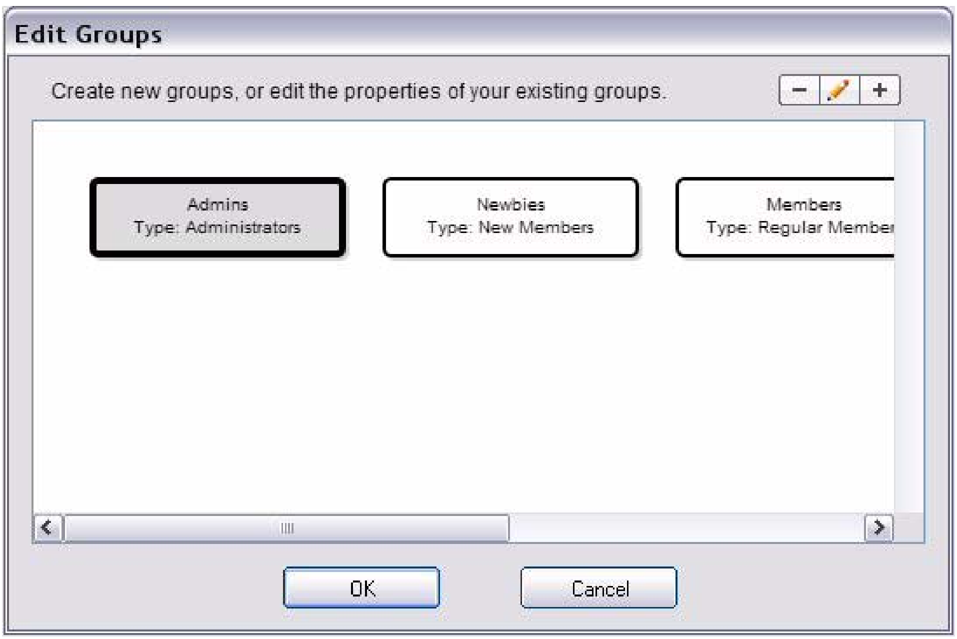
4. Select the **Group** you want to delete and then click on the **Minus** icon.



5. A confirmation dialog box appears, checking you want to delete the selected **Group**. Click **Yes** to confirm you want to delete the selected Group.



The **Group** is deleted from the Group list.



How to Create Custom User Roles

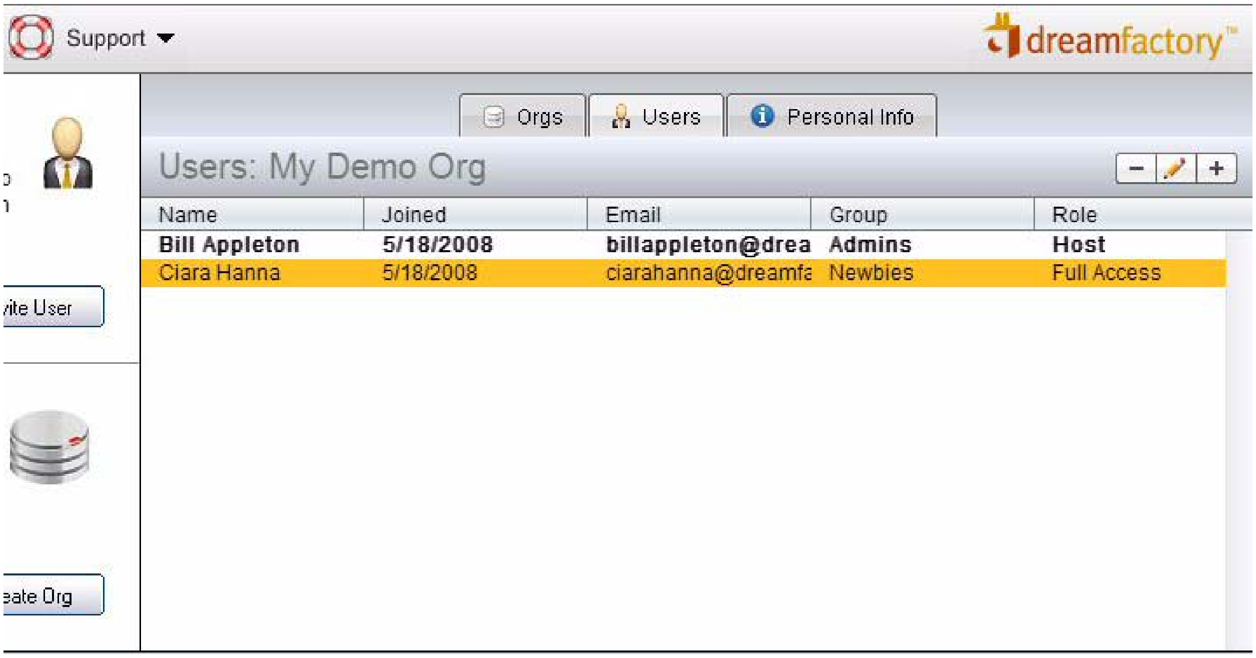
A Role determines what type of access a User has in an Org and what privileges they have been assigned. There are seven default User Roles in DreamTeam. The default user roles are;

- **No Access** - The user cannot access any features in DreamTeam
- **Read Only** - The user can only read data in DreamTeam
- **Read and Create** - The user can read and create data in DreamTeam
- **Read and Update** - The user can read and update data in DreamTeam
- **Read, Create and Update** - The user can read, create and update data in DreamTeam

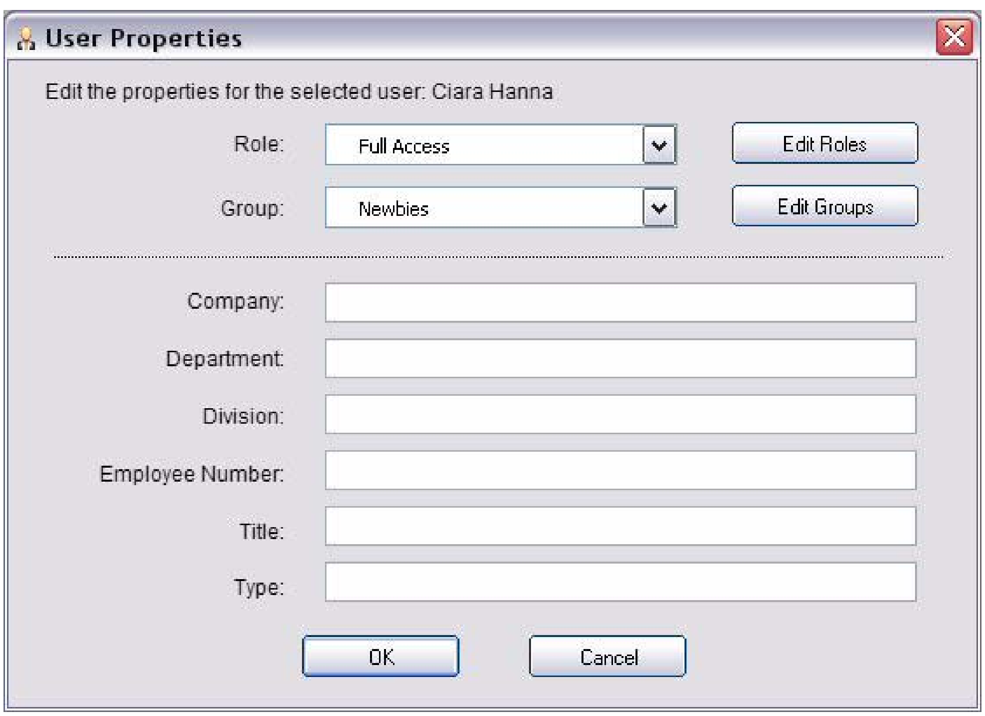
- **Full Access** - The user can read, create, update and delete data in DreamTeam
- **Administrator** - The user can edit user properties, edit Org properties, delete users, invite new users to the Org, archive Orgs, read, create, update and delete all data.

You can also create custom roles in DreamTeam. To create a new Custom User Role, follow these steps;

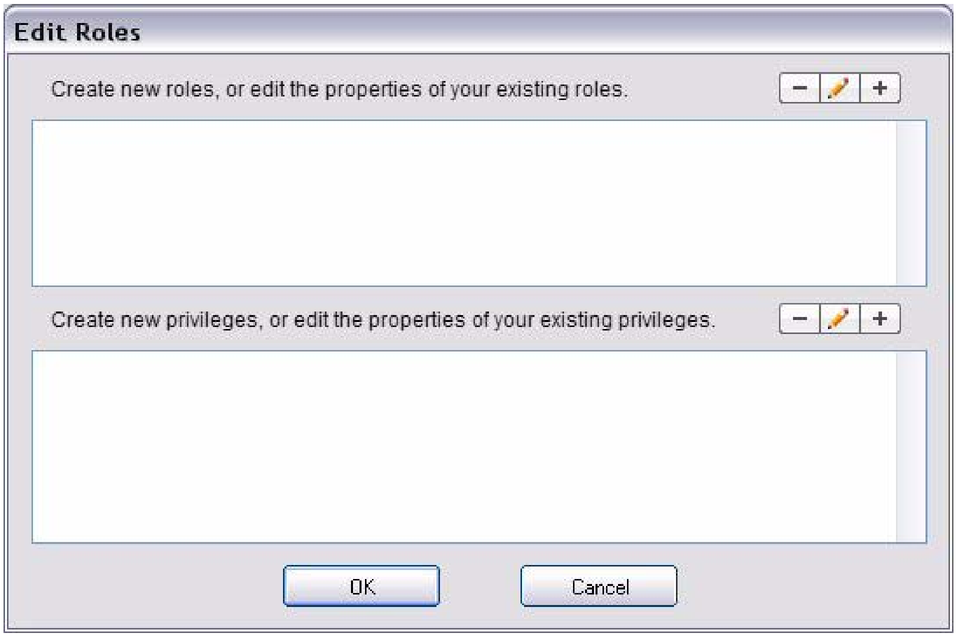
1. Select a **User** from the Users list.



2. Click the **Pencil** icon. The **User Properties** dialog box is displayed.

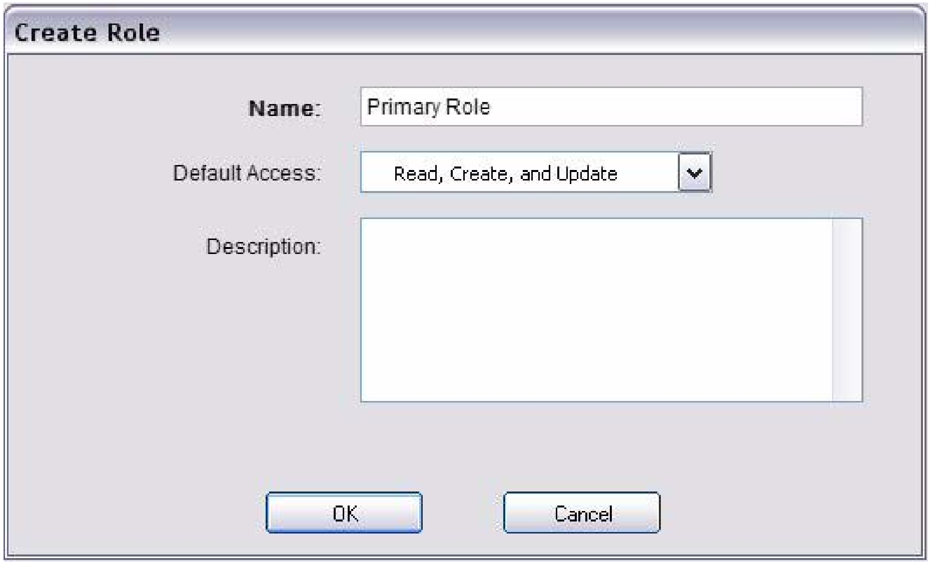


3. Click **Edit Roles**. The **Edit Roles** dialog box is displayed.



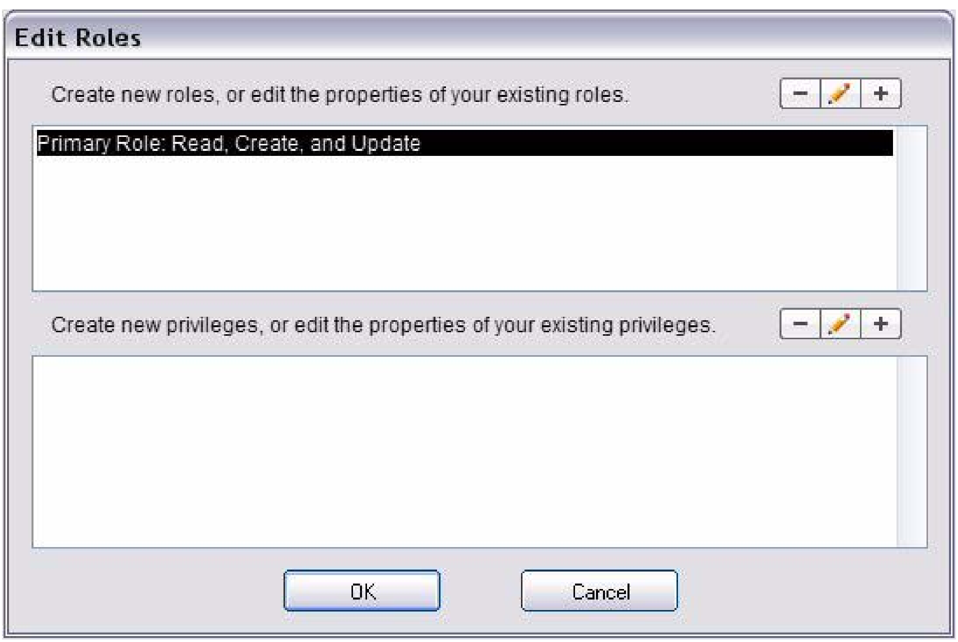
4. Click the **Plus** (**+**) icon in the upper right side of the screen. The **Create Role** dialog box is displayed.

5. Type a name for the custom role in the **Name** text box.



6. Select the level of access you want to set for the role from the **Default Access** drop down list.

7. Click **OK** to save your settings and close the dialog box. The new custom role is displayed in the **Edit Roles** dialog box.



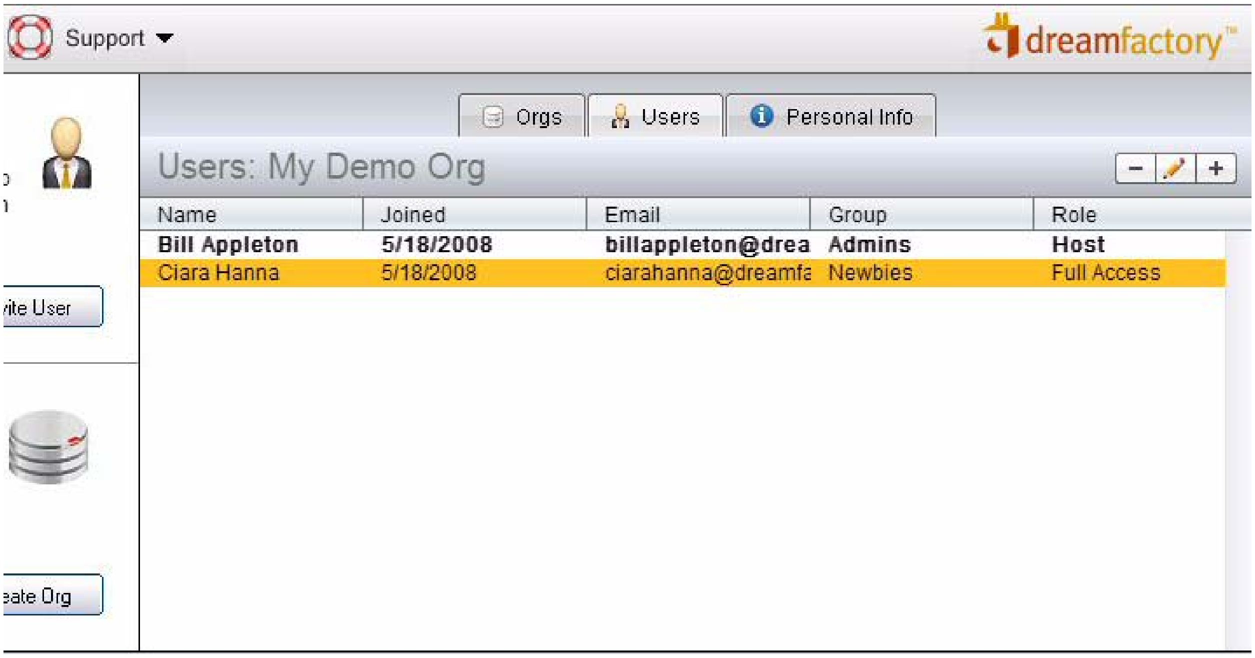
8. Click **OK** to save all your changes to the custom role and close the dialog box.

How to Edit a Custom User Role

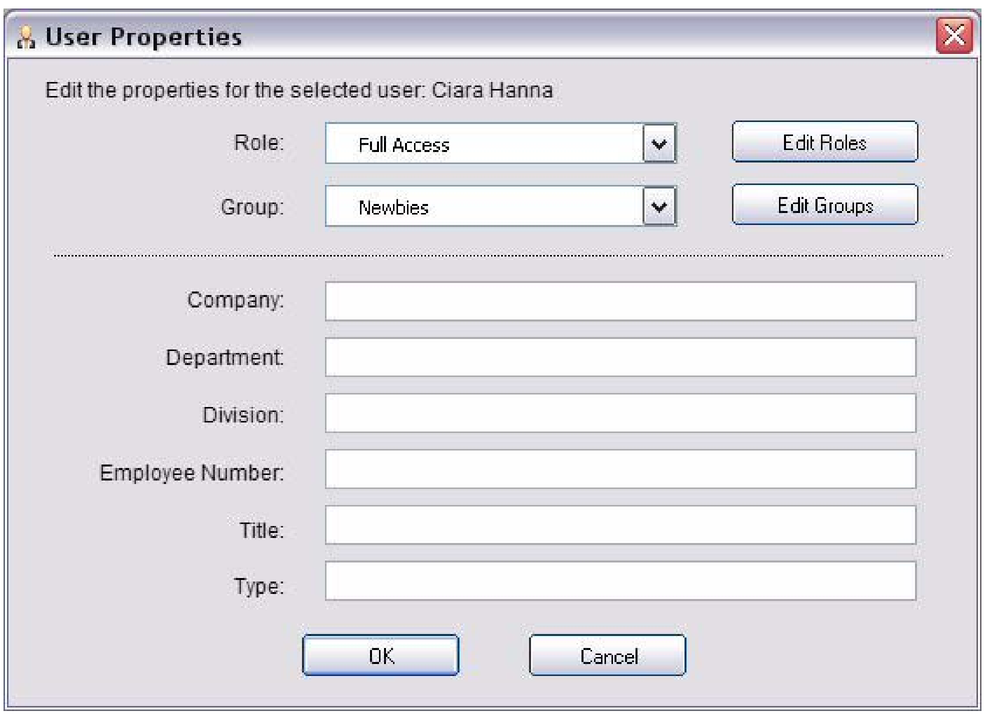
After you have created a custom user role, you may want to change the properties or privileges associated with it. You cannot edit the properties of a default user role. To edit a custom user role, follow these steps;

1. Select the User Role you want to edit from the first section of the Edit Roles dialog box.

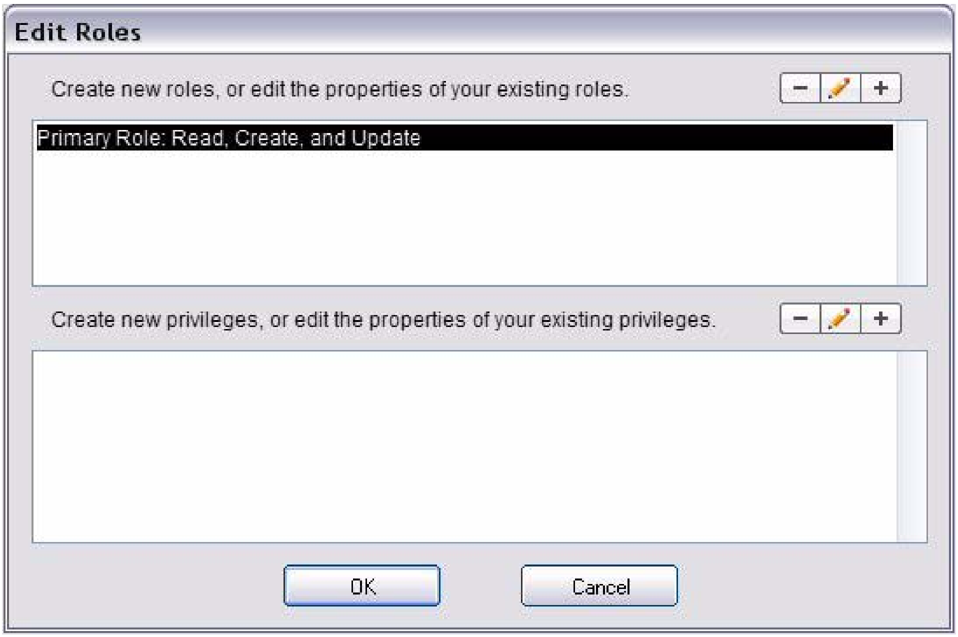
2. Select a **User** from the Users section.



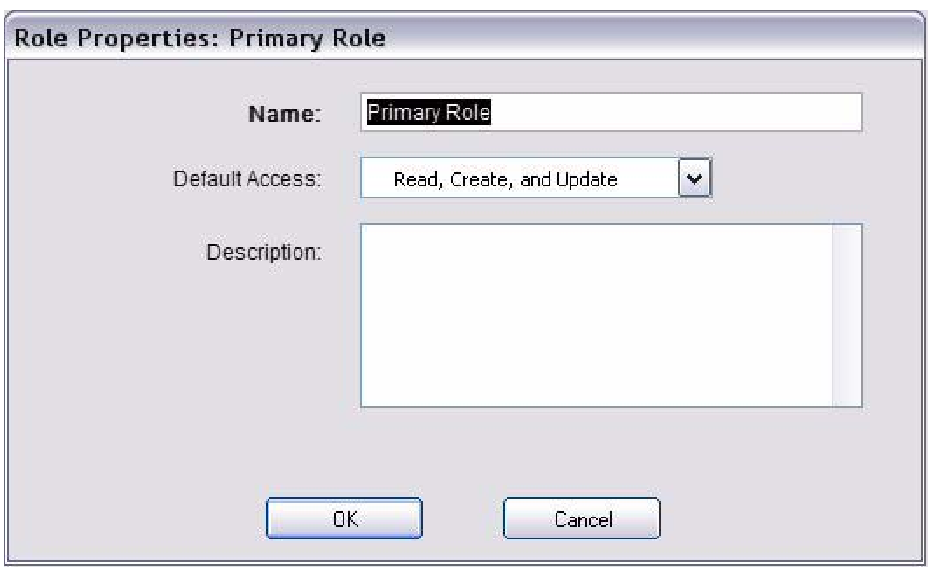
3. Click the **Pencil** icon. The **User Properties** dialog box is displayed.



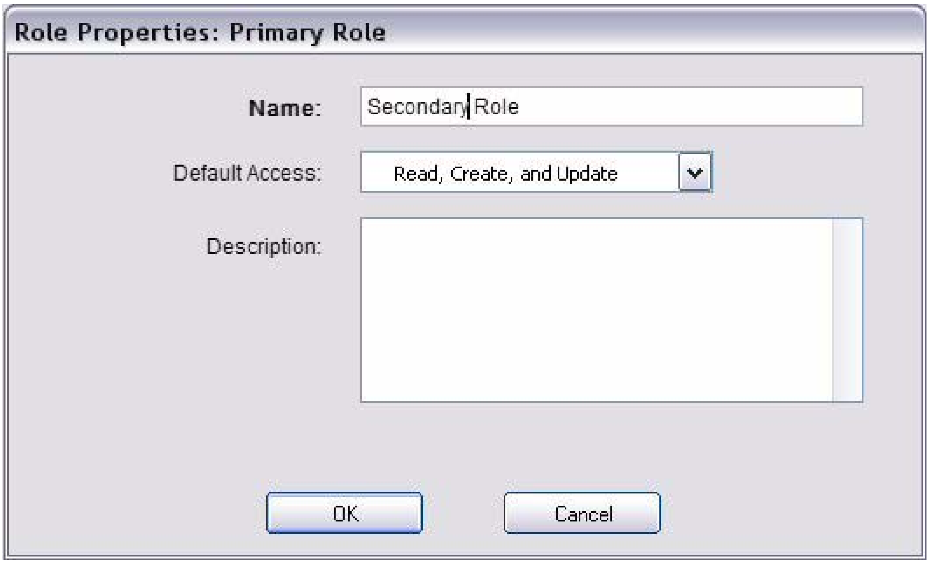
4. Click **Edit Roles**. The **Edit Roles** dialog box is displayed.



5. Select the role you want to edit and click the **Pencil** icon. The **Role Properties** dialog box is displayed. All the properties for the existing role are displayed in the dialog box.



6. Edit the role properties you want to change, (for this example, the role Name) and click **OK**.



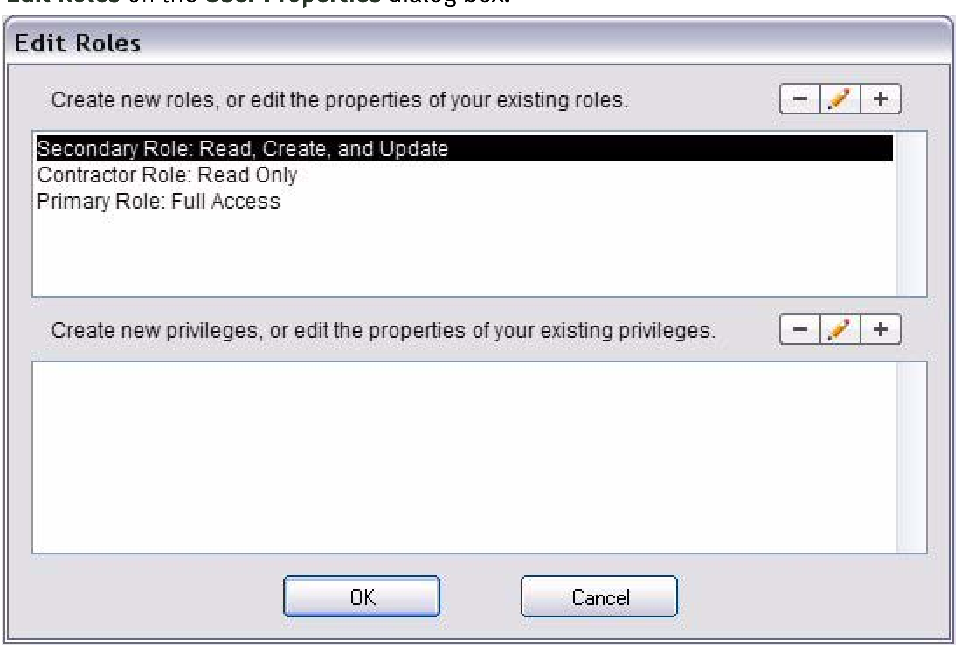
You have successfully edited the properties of the existing custom role.

How to Delete a Custom User Role

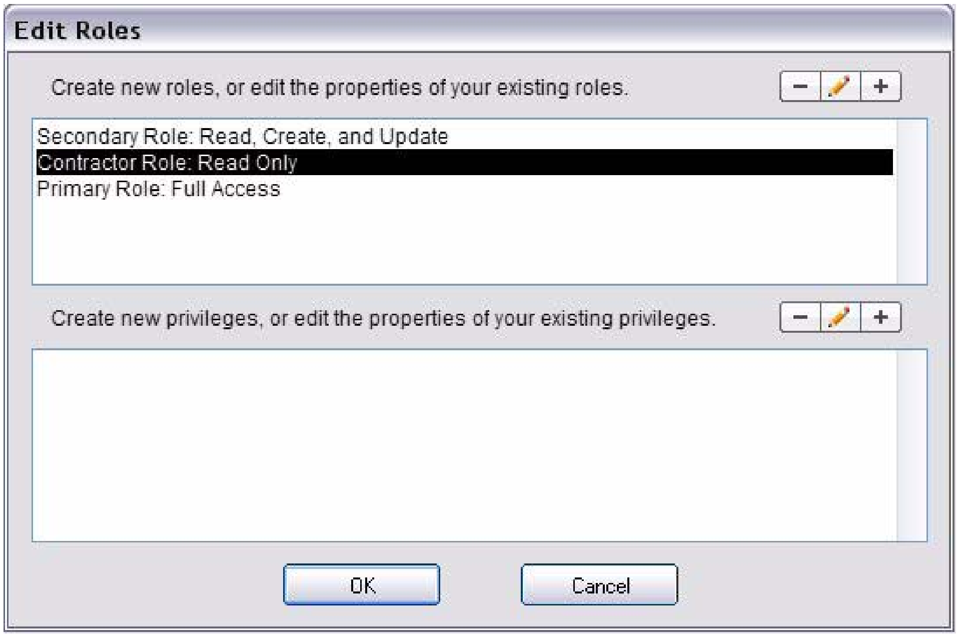
You can delete any custom user role, but you cannot delete any default user roles. To delete a custom user role, follow these steps;

1. Open the **Edit Roles** dialog box.

   Note: To open the **Edit Roles** dialog box, select a user from the **User** list and click the **Pencil** icon. Then click **Edit Roles** on the **User Properties** dialog box.

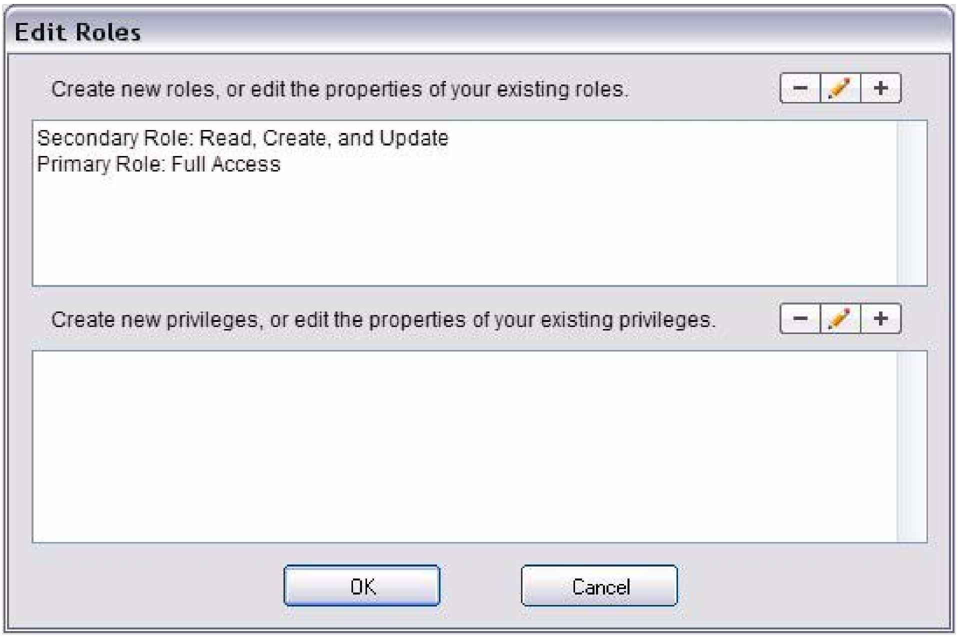


2. Select the **User Role** you want to delete from the list and click the **Minus (-)** icon.



3. A confirmation dialog box appears to confirm you want to delete the custom role. Click **Yes** to confirm deletion.

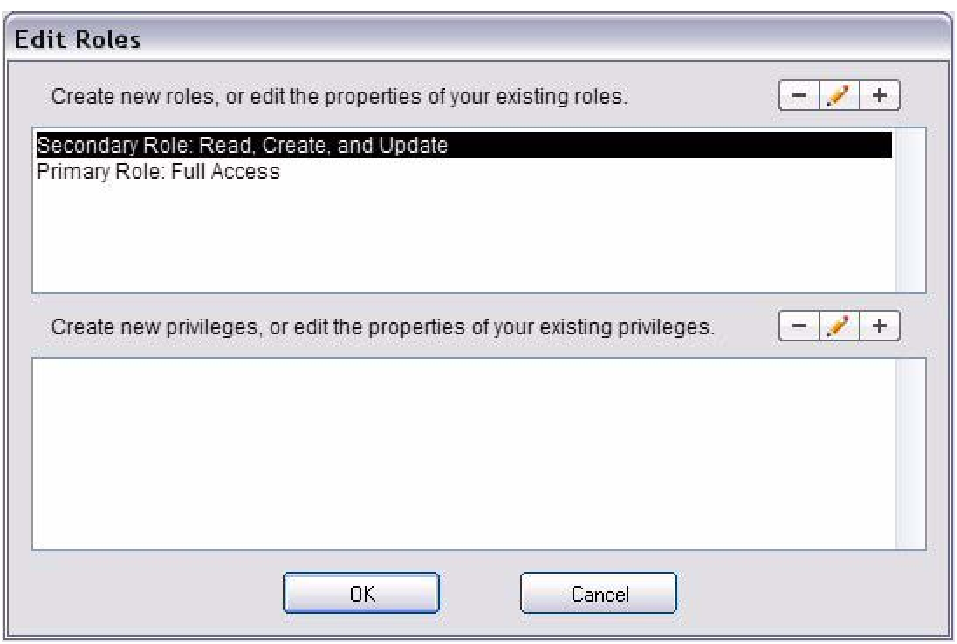
The custom role is deleted from the **Edit Roles** dialog box.



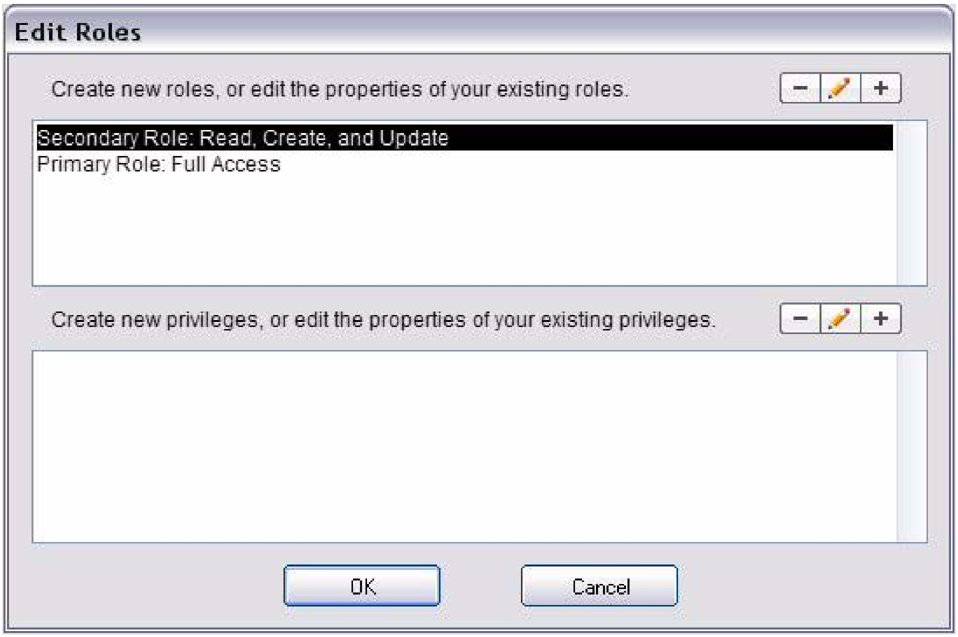
How to Create New Privileges

There are three applications included with DreamTeam. These are **Project Manager, Collaborative Calendar** and **Document Manager.** When you create a new role, the **Edit Roles** dialog box also allows you to create new privileges that can determine if a User has access to a specific application and what type of access they have, for example; No Access, Read Only, Read/Create, and so on. To create new privileges for a DreamTeam application, follow these steps:

1. Open the **Edit Roles** dialog box.



2. Click the **Plus (+)** icon beside the lower **Privilege** display panel.

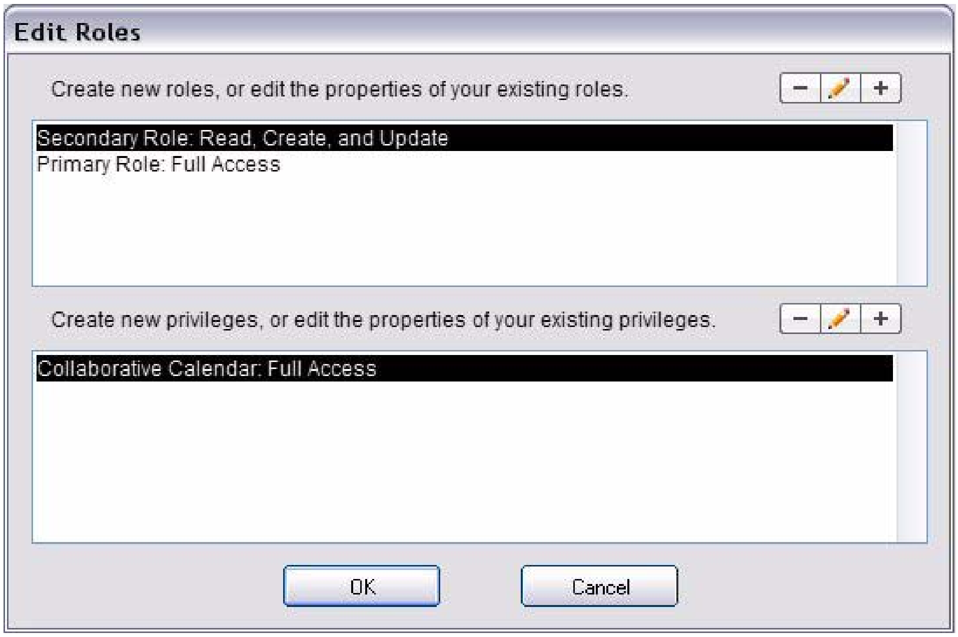


The **Create Privilege** dialog box is displayed.

3. From the **Application** drop down list, select the application you want to enable access to,

4. From the **Access** drop down list, select the level of access you want to grant for the application.

5. Click **OK** to close the **Create Privilege** dialog box.



The new privilege is displayed in the Edit Roles dialog box.

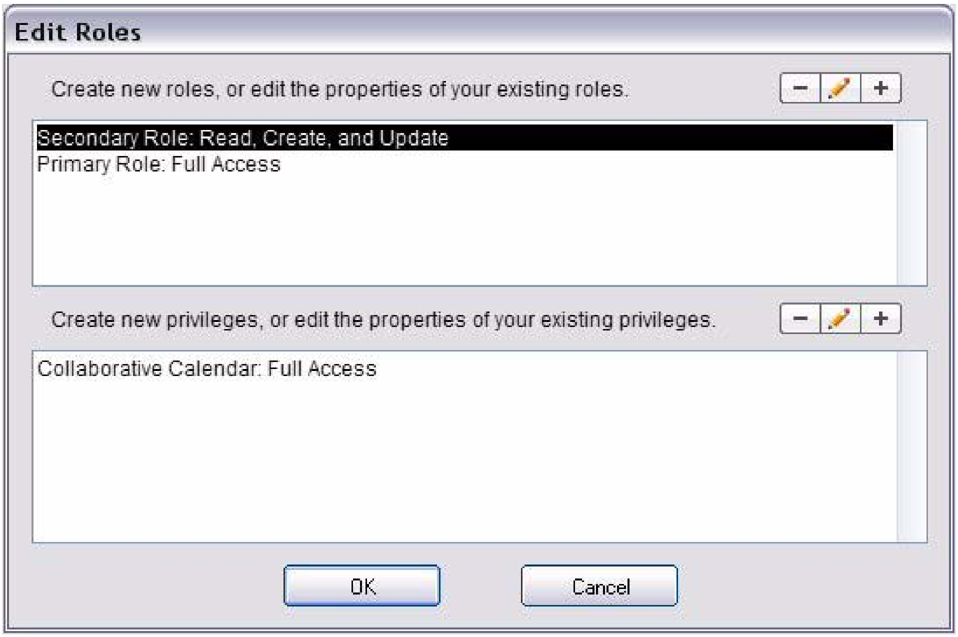
6. Click **OK** to close this dialog box.

How to Edit Existing Custom Privileges

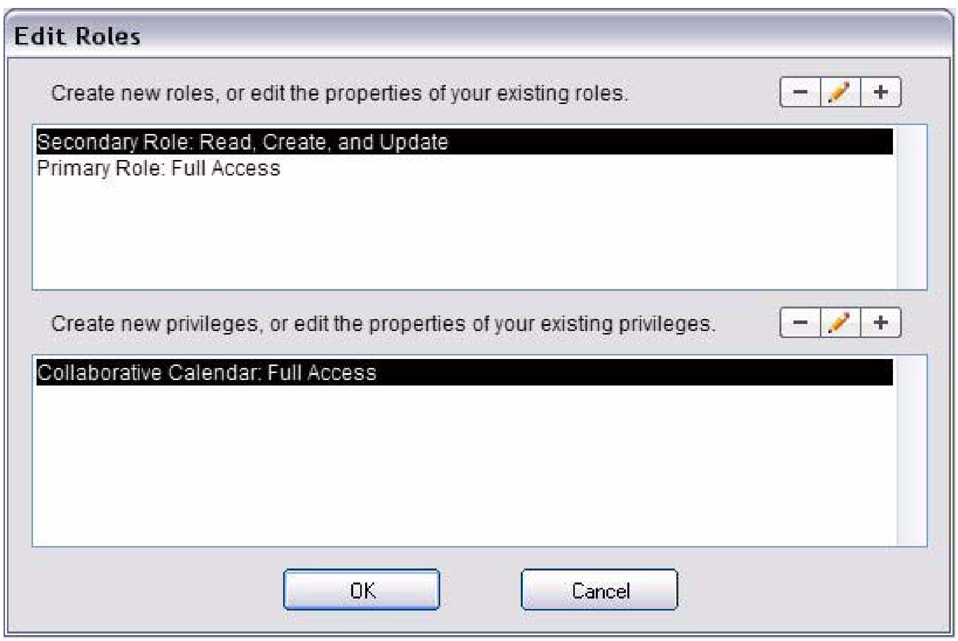
You can edit the privileges of any existing custom role. To edit existing privileges, follow these steps;

1. Open the **Edit Roles** dialog window.

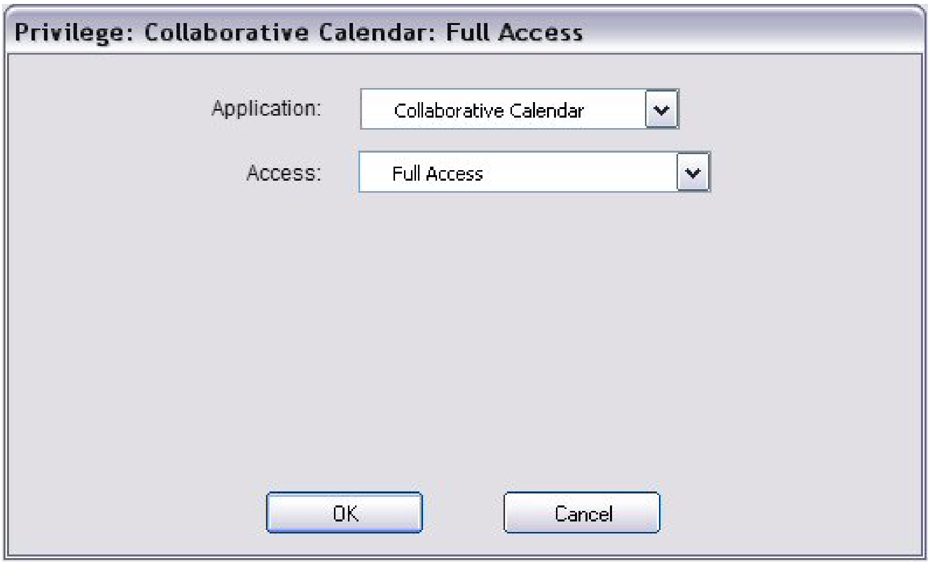
   Note: To open the **Edit Roles** dialog box, select a user from the **User** list and click the **Pencil** icon. Then click **Edit Roles** on the **User Properties** dialog box.



2. Select the privilege you want to edit from the lower display panel on the **Edit Roles** dialog box.

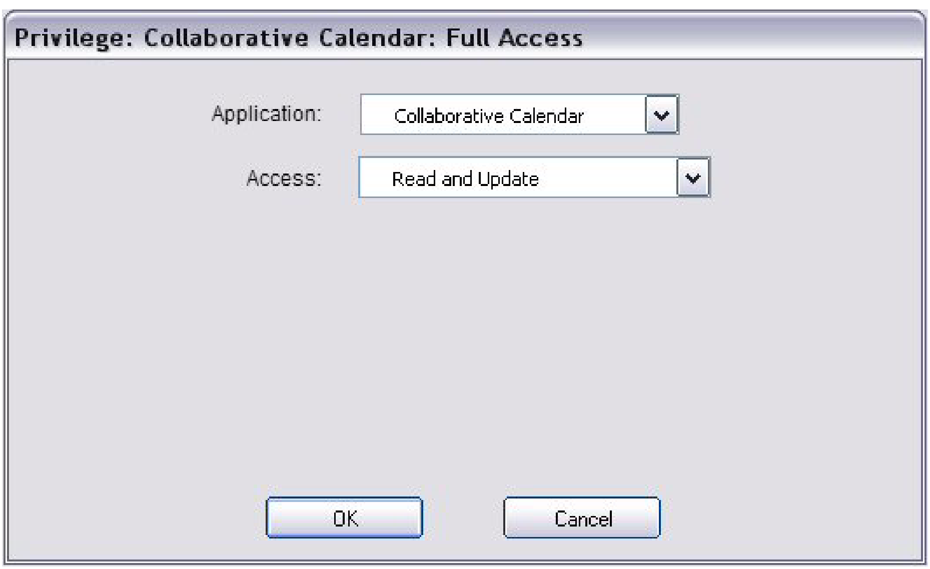


3. Click the **Pencil** icon. The **Privilege** dialog box is displayed.

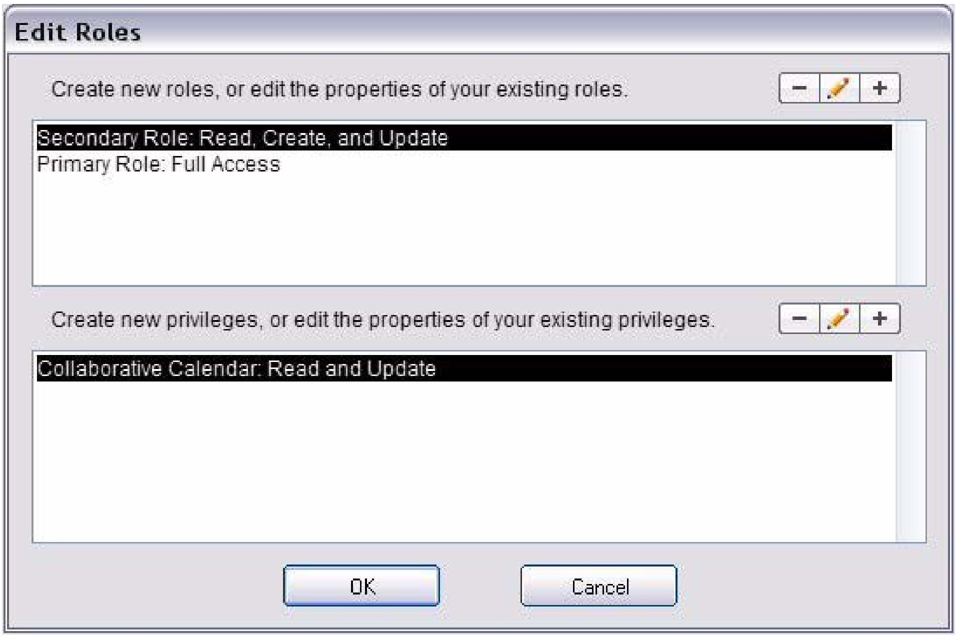


The properties for the privilege you selected are displayed on this dialog box.

4. Make any necessary changes to the selected privilege by selecting an alternative from the drop-down lists. In this example, we will change the **Access** privileges.



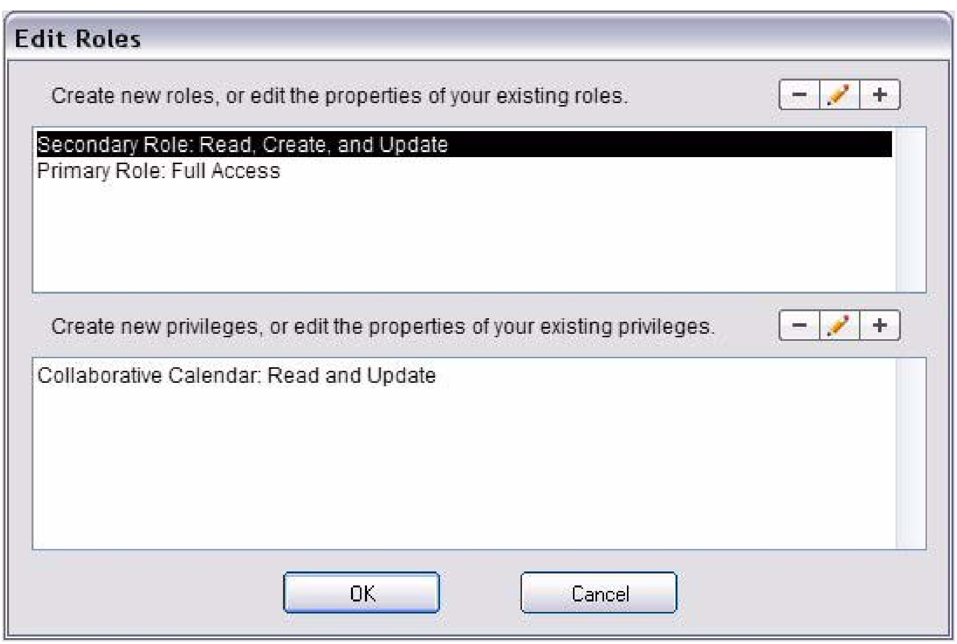
5. Click **OK** to save the changes you made. The changes are displayed on the **Edit Roles** dialog box.



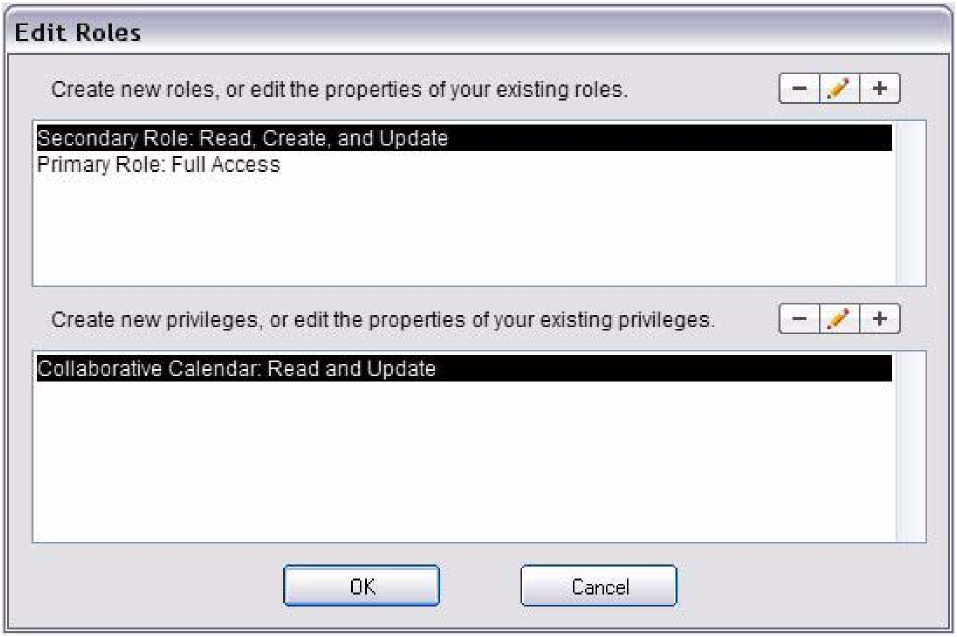
How to Delete Privileges

You can delete any of the privileges you created. To delete privileges, follow these steps;

1. Open the **Edit Roles** dialog box.



2. Select the privilege that you want to delete from the lower display panel on the **Edit Roles** dialog box.

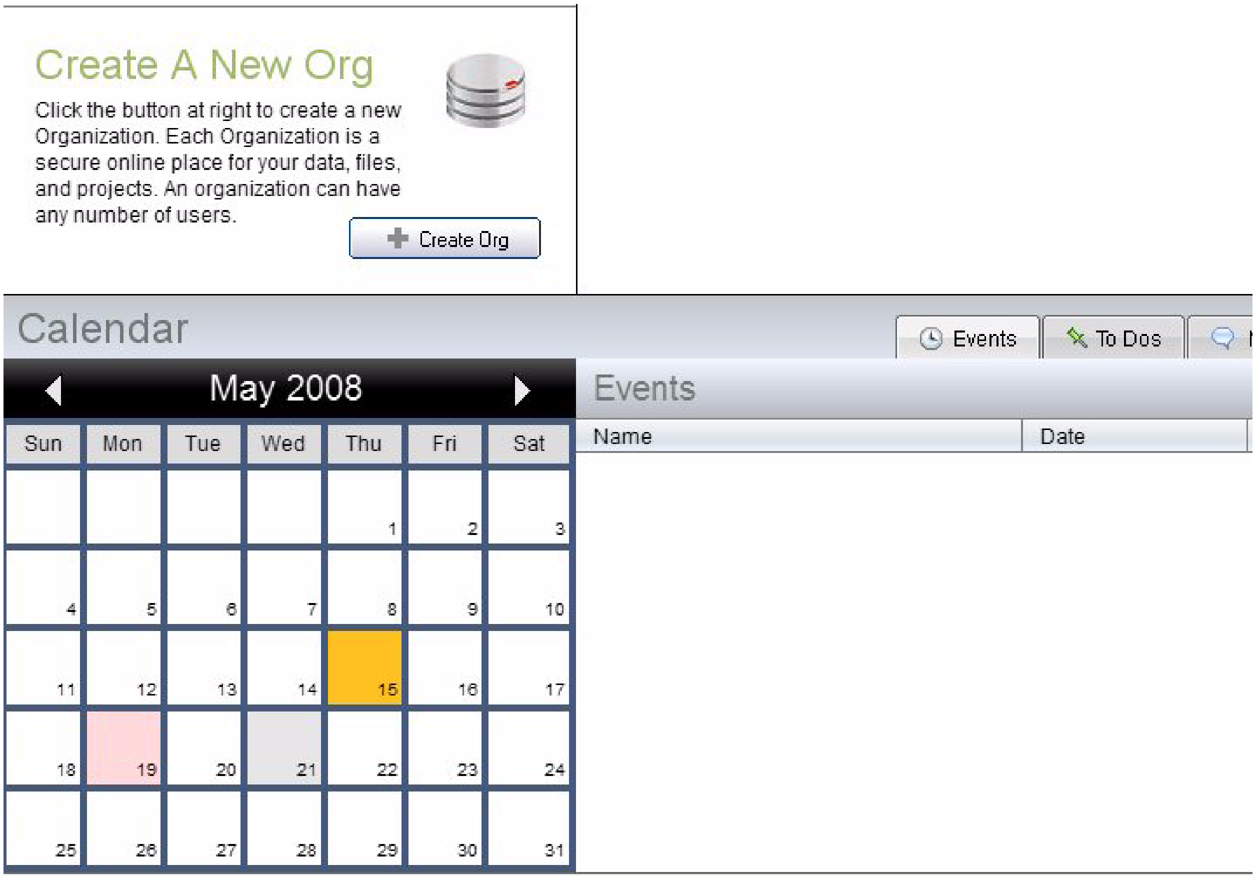


3. Click on the **Minus (-)** icon in the upper right hand corner. The **Delete Privilege?** dialog box is displayed.

4. Click the **Yes** button to confirm you want to delete the selected privilege.

How to Use the Calendar

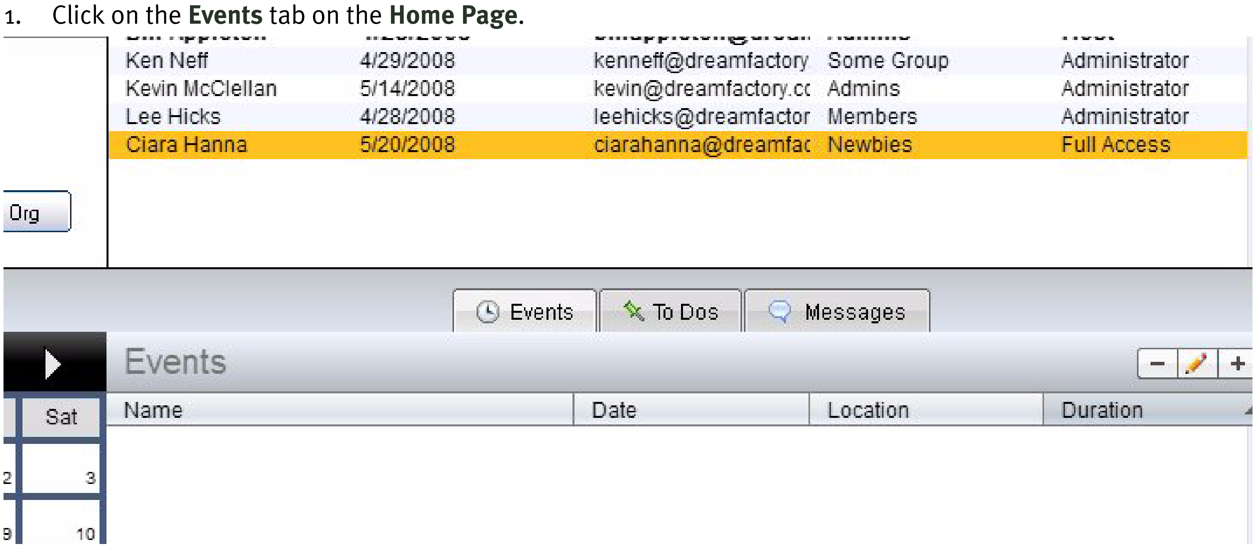
The **Calendar** resides at the bottom left corner of the **Amazon Home Page**. Days on the calendar shaded in gray, denote an event that occurs on that day. When you click on a date with assigned events, a list of events will appear on the Events section directly to the right of the Calendar. For information on creating events on the Calendar, see How to Create an Event.



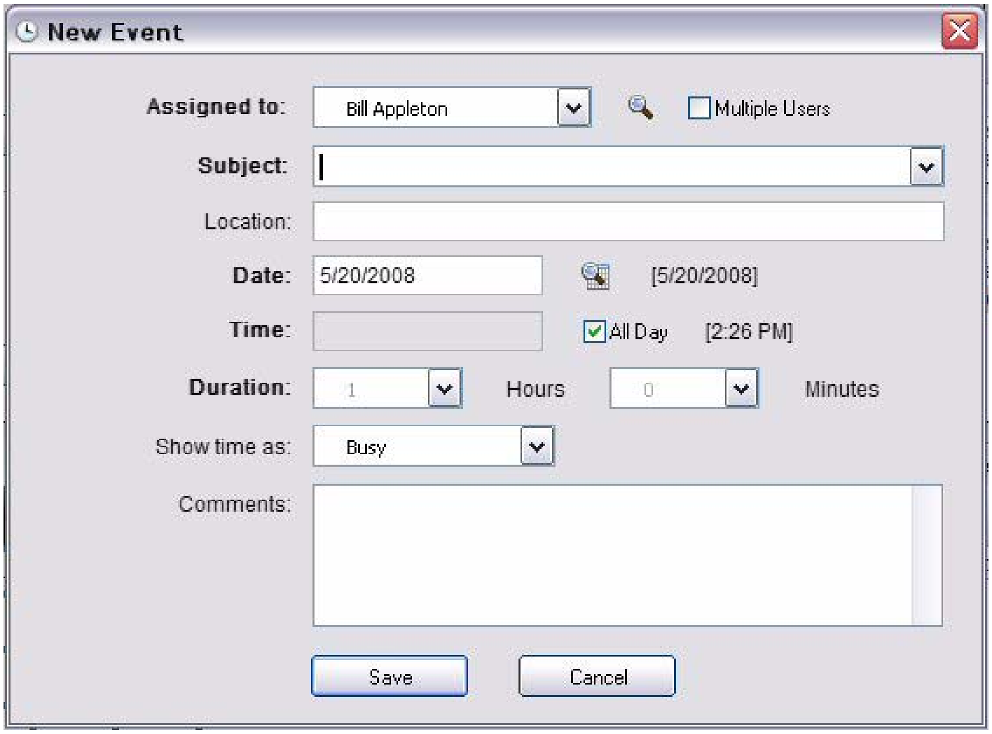
How to Create an Event

An event is a meeting that **Users** are assigned to. All **Events** are listed on the **Home Page** under the **Events** section. You can create an event for yourself or create events for other users in your Org, provided you have the relevant privileges. To create an **Event**, follow these steps;

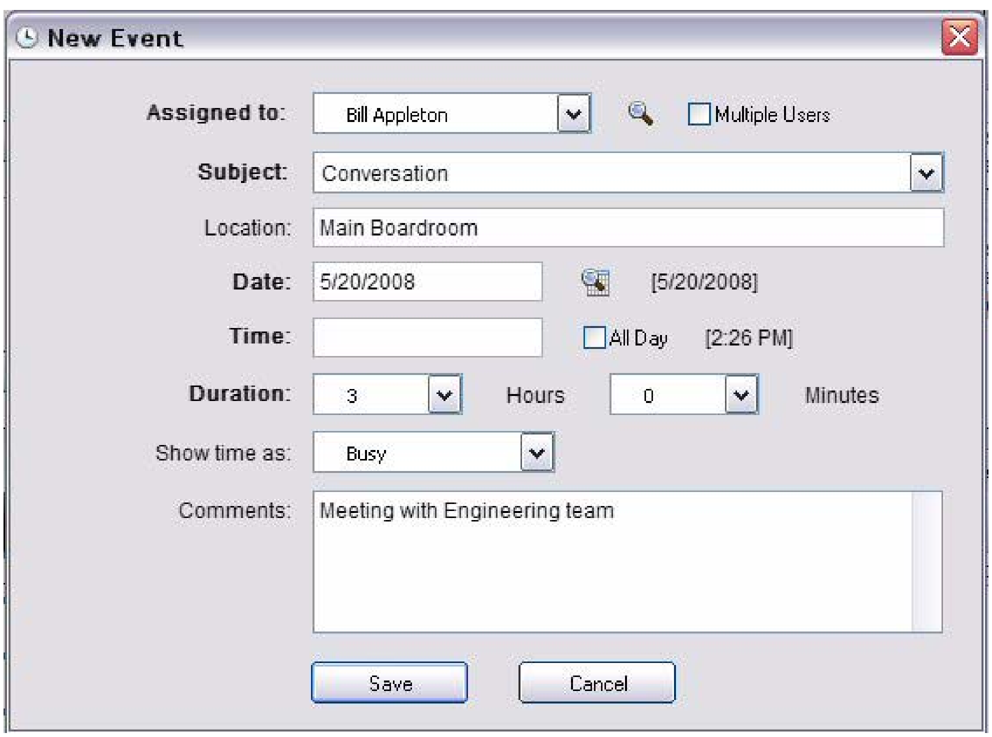
1. Click on the **Events** tab on the **Home Page**.



2. Click on the **Plus (+)** icon on the right hand side of the page. The **New Event** dialog box is displayed.

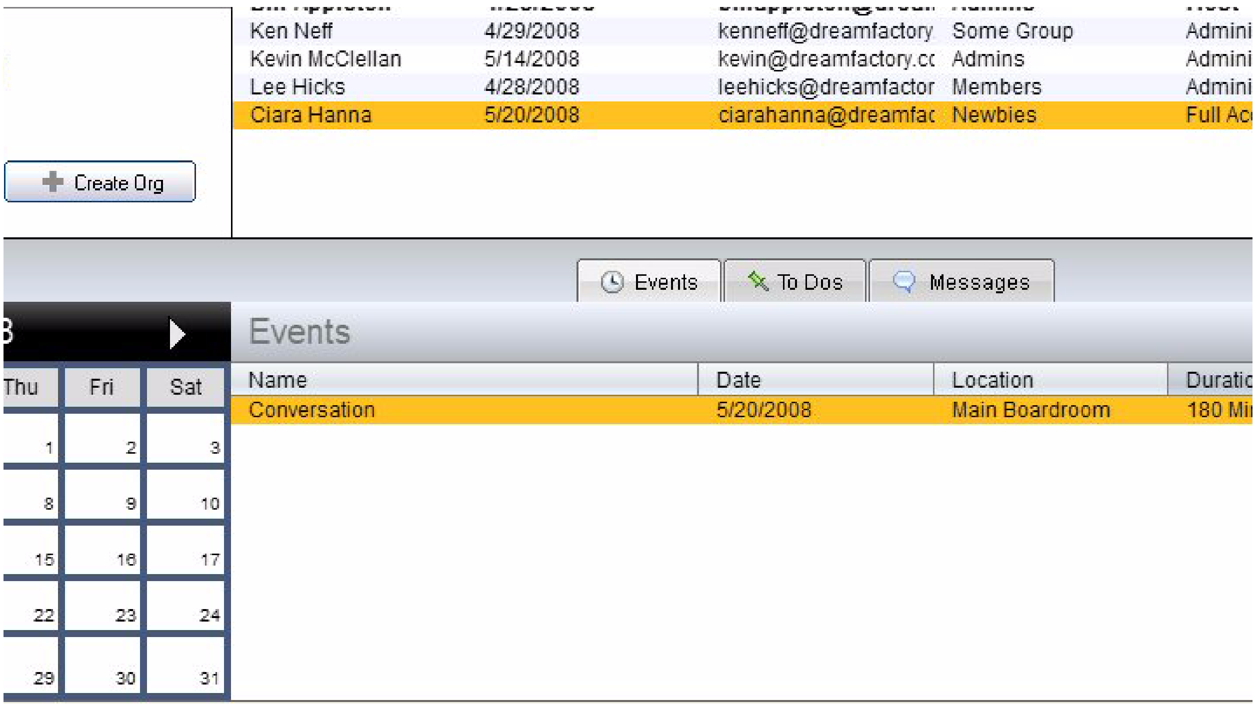


3. Enter all the information for the new event in the appropriate fields. The **Assigned To**, **Date**, **Time** and **Duration** fields are mandatory fields.



4. Click **Save** to save the new **Event**. The **Event** is displayed on the assigned **Users Home Page** and the date of

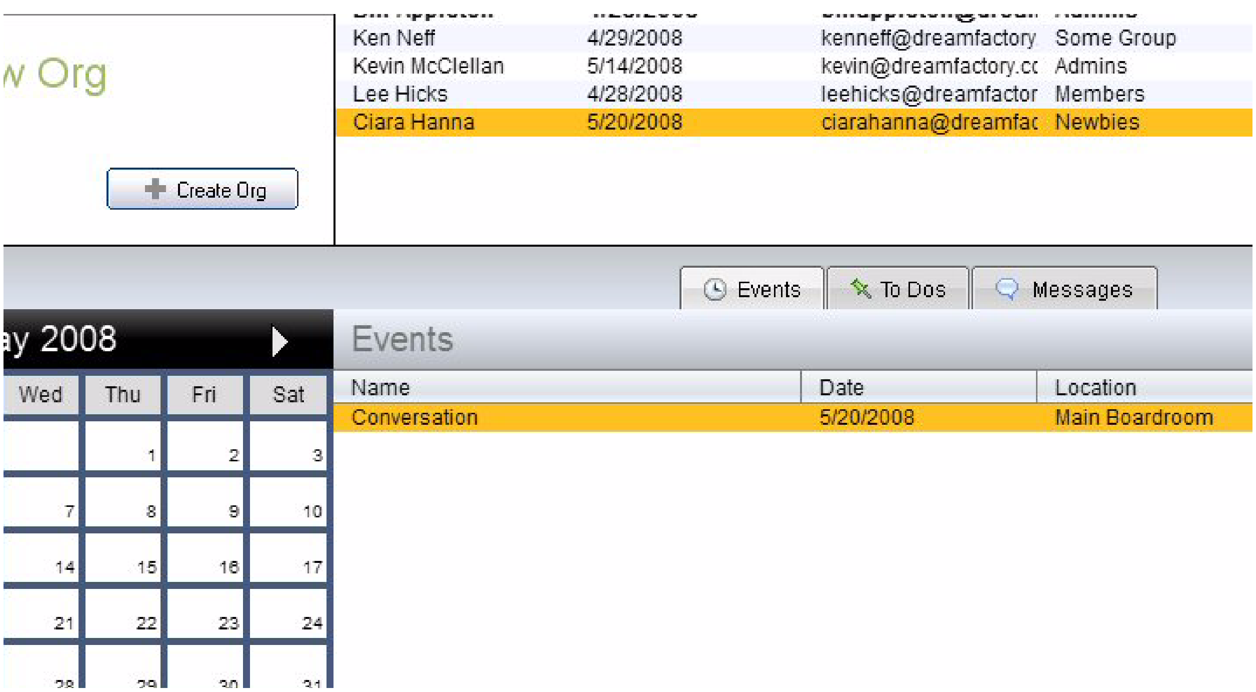
the events appears grayed out on their Calendar.



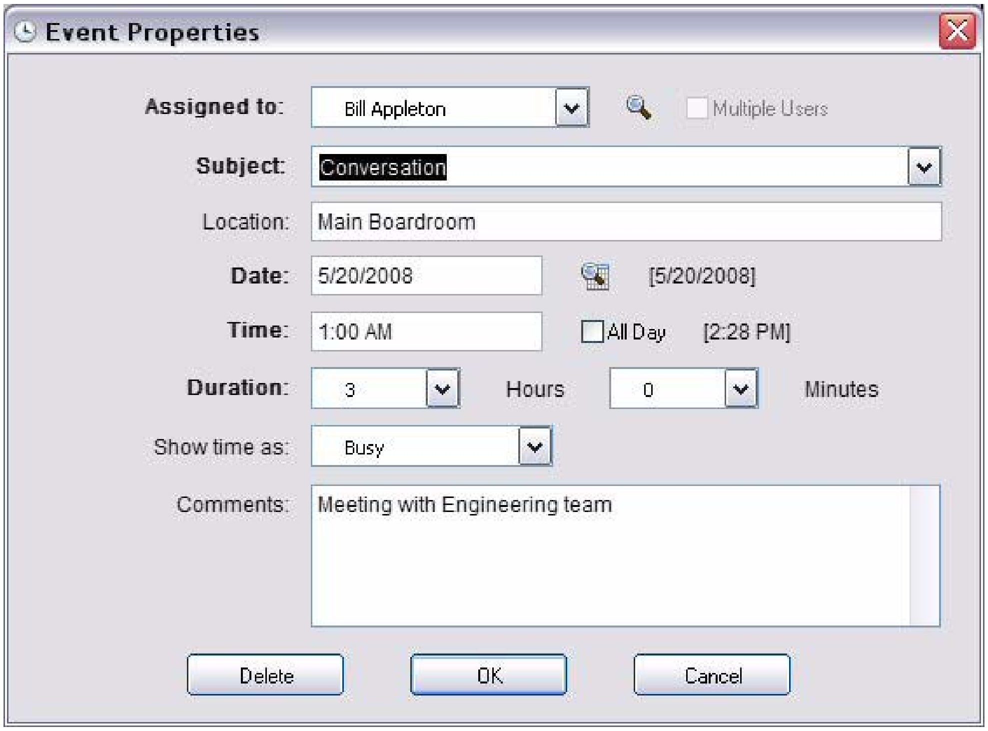
How to Edit an Event

If you have the appropriate privileges you can edit the properties of an existing event. To edit the properties of an Event, follow these steps;

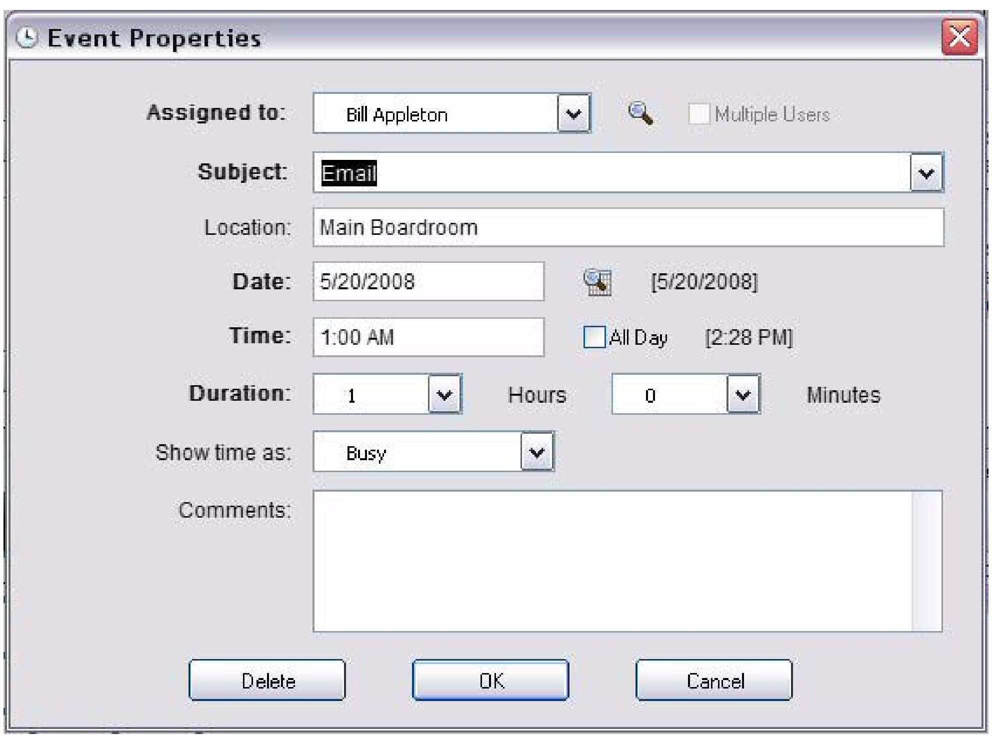
1. Select the **Event** you want to edit from the **Event List.**



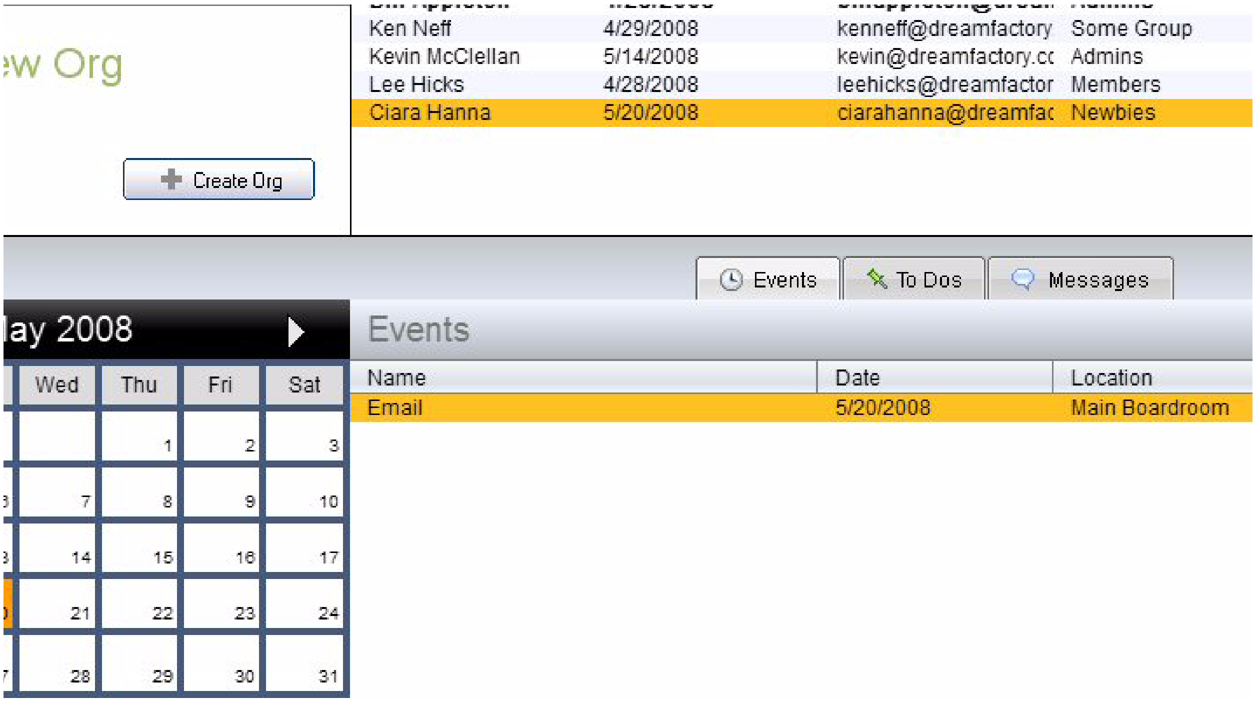
2. Click the **Pencil** icon on the right hand side of the screen. The **Event Properties** dialog box is displayed.



3. Make any necessary changes to the properties of the **Event**. For this example, we changed the event **Subject**.



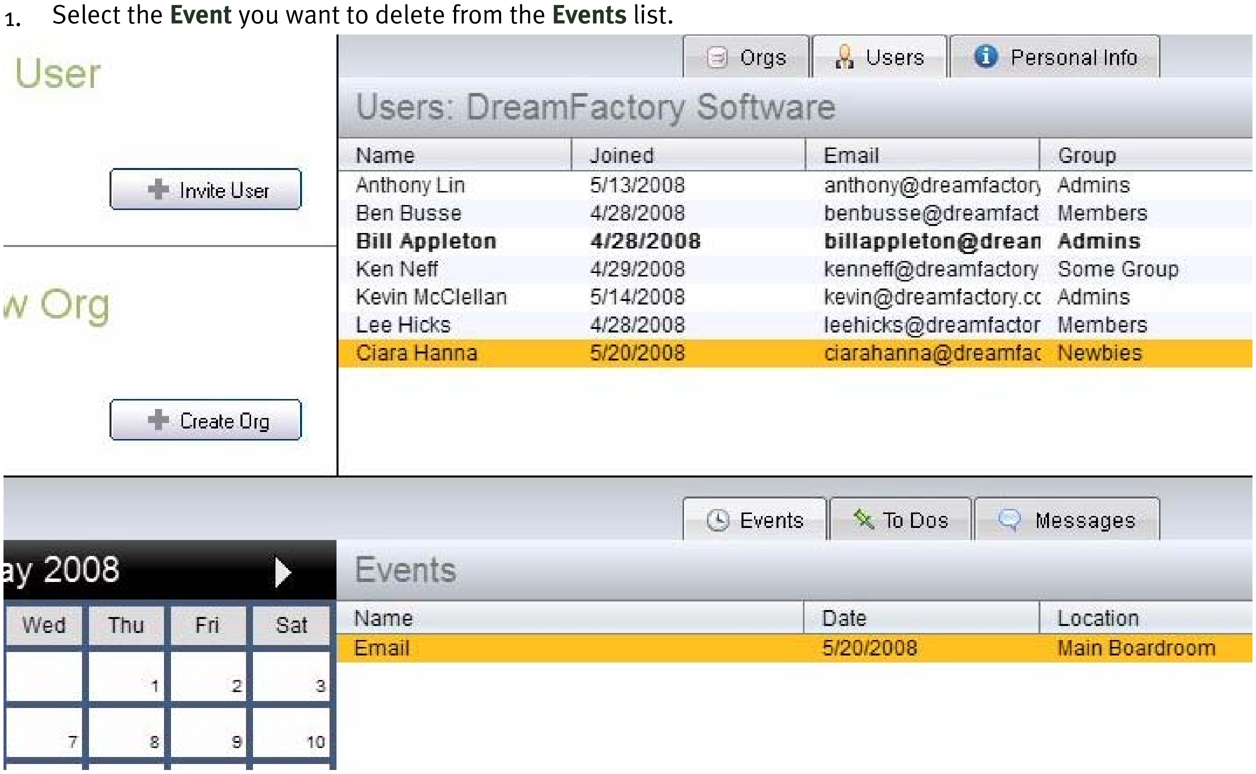
4. Click **OK** to save all your changes. The new edited event appears on the **Event List**.



How to Delete an Event

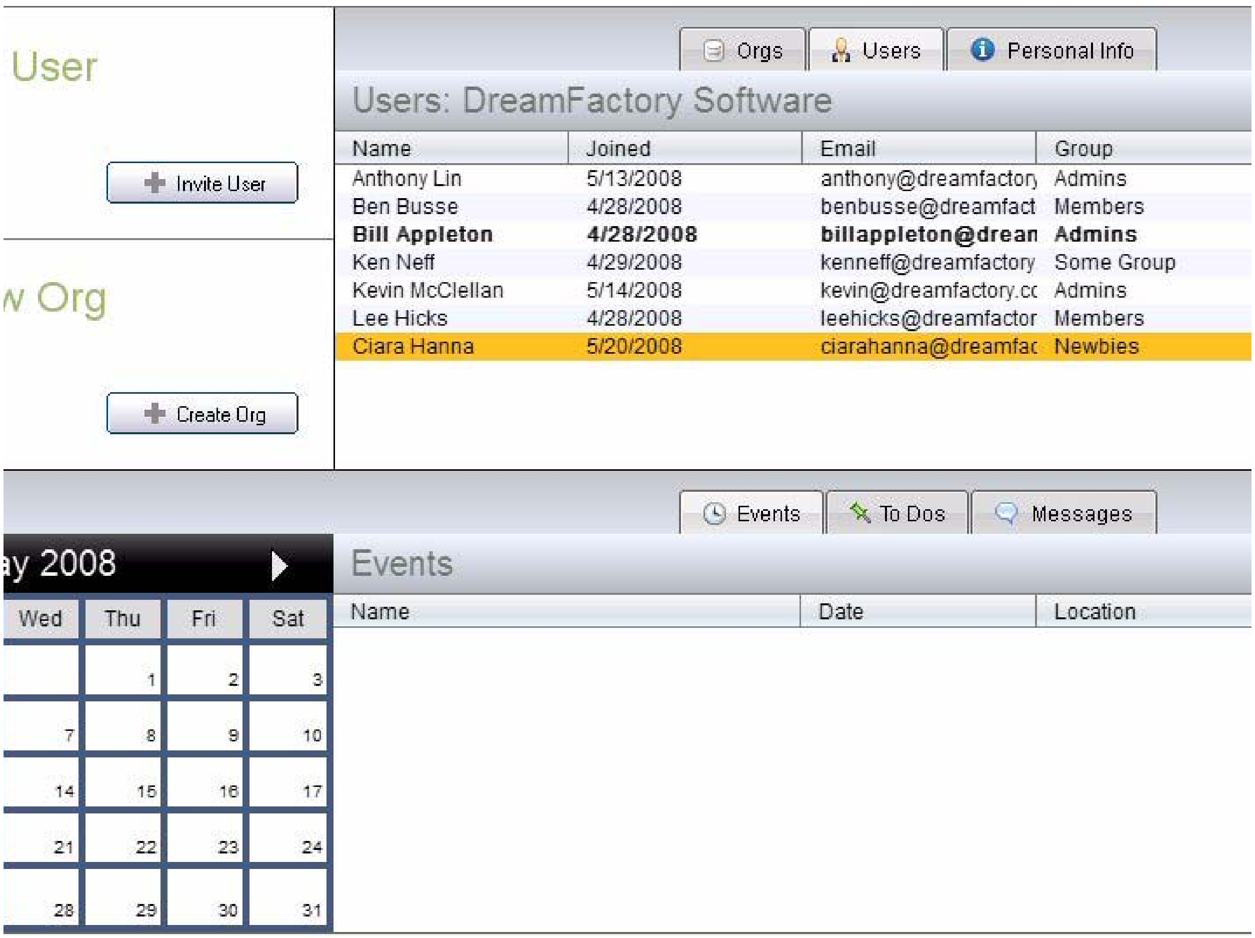
If you have the appropriate privileges you can delete and existing event. To delete an event, follow these steps;

1. Select the **Event** you want to delete from the **Events** list.



2. Click on the **Minus (-)** icon on the right hand side of the screen. The **Delete Event?** dialog box is displayed.

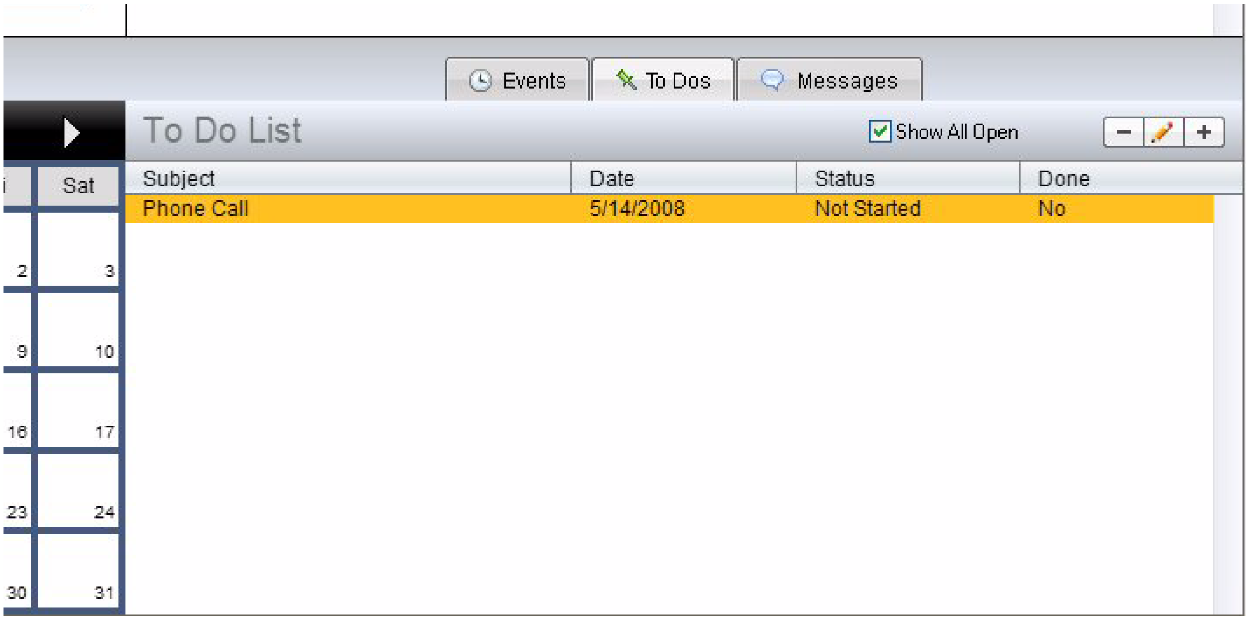
3. Click the **Delete** to confirm you wan to delete the **Event**. The Event is removed from the **Events** list.



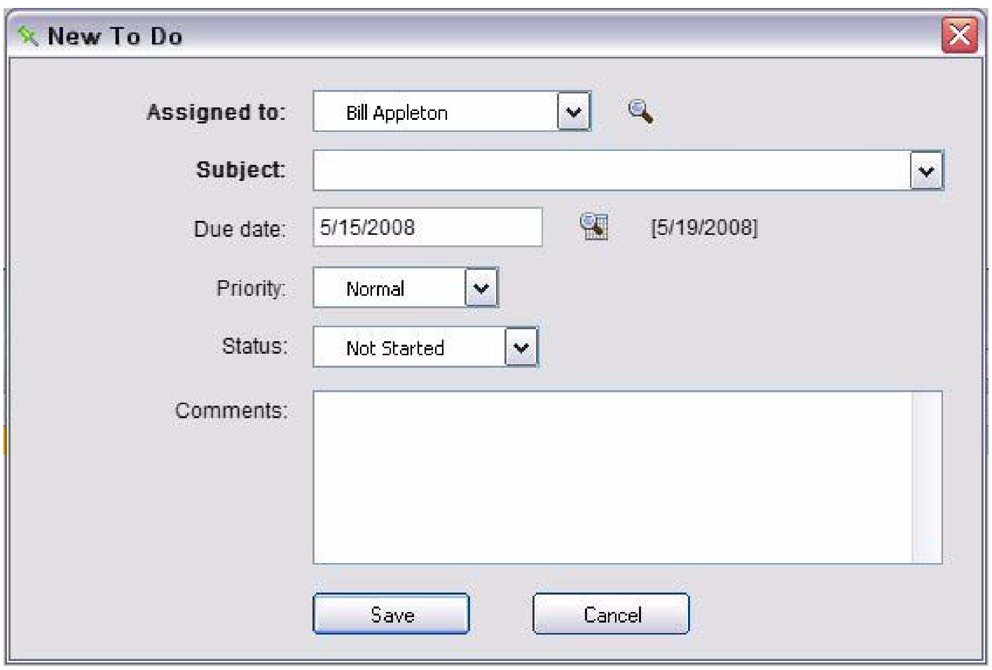
How to Create a To Do

A **To Do** is a simple task assigned to a **User**. All To Dos appear on the **User's Home Page** under the **To Do's** section. The **Home Page** allows you to create To Do's for Users in your Org. To create a To Do, follow these steps;

1. Click on the **To Do's** tab in the **To Do List** section.

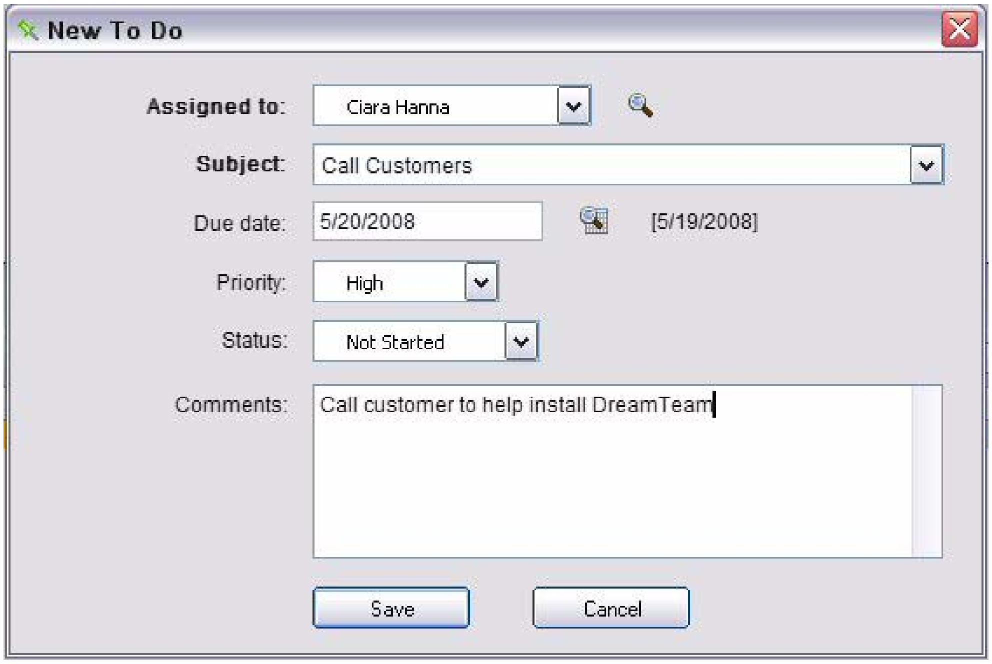


2. Click on the **Plus (+)** icon on the right hand corner of the To Do's section. The **New To Do** dialog box is displayed.

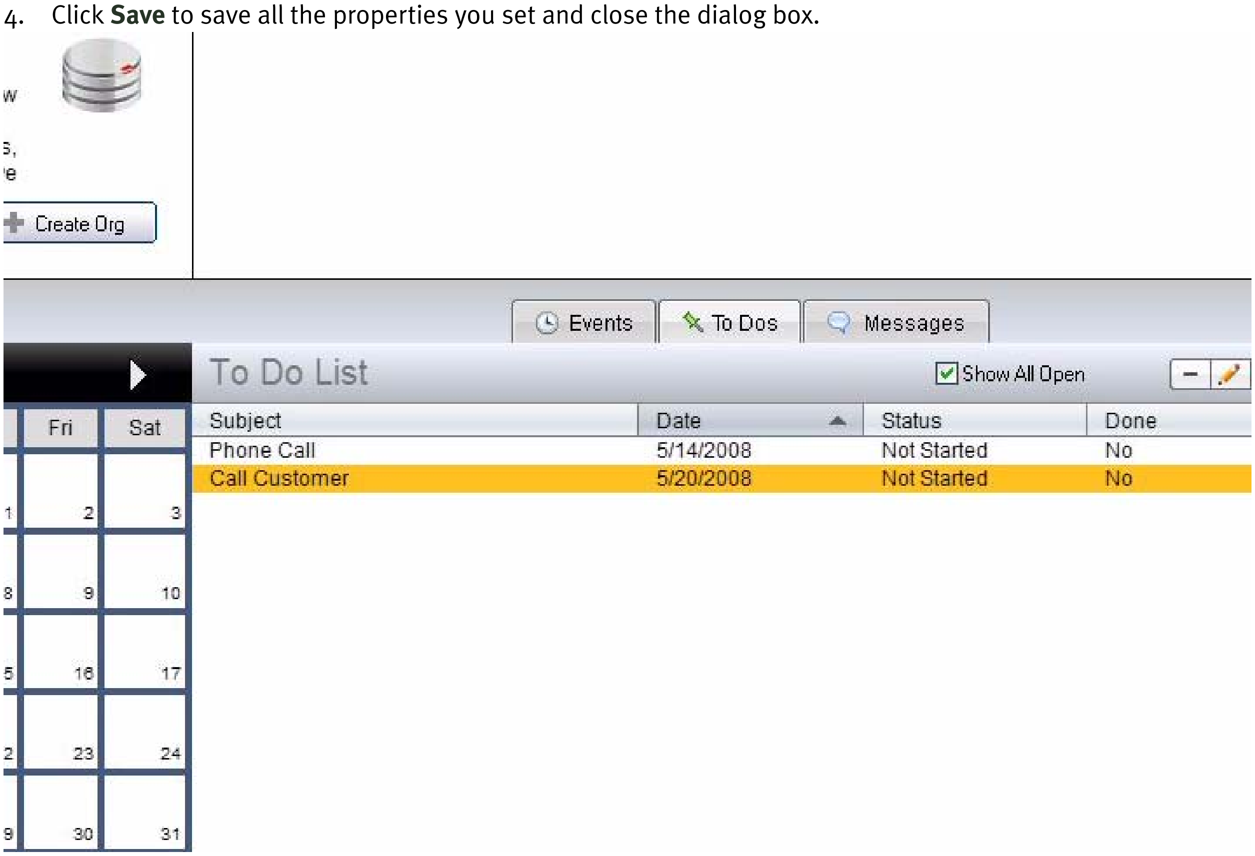


3. Choose an assignee for the To Do from the **Assigned To** drop down list. You can also set a subject for the To

Do, set a due date, set priority and status for the To Do.



4. Click **Save** to save all the properties you set and close the dialog box.

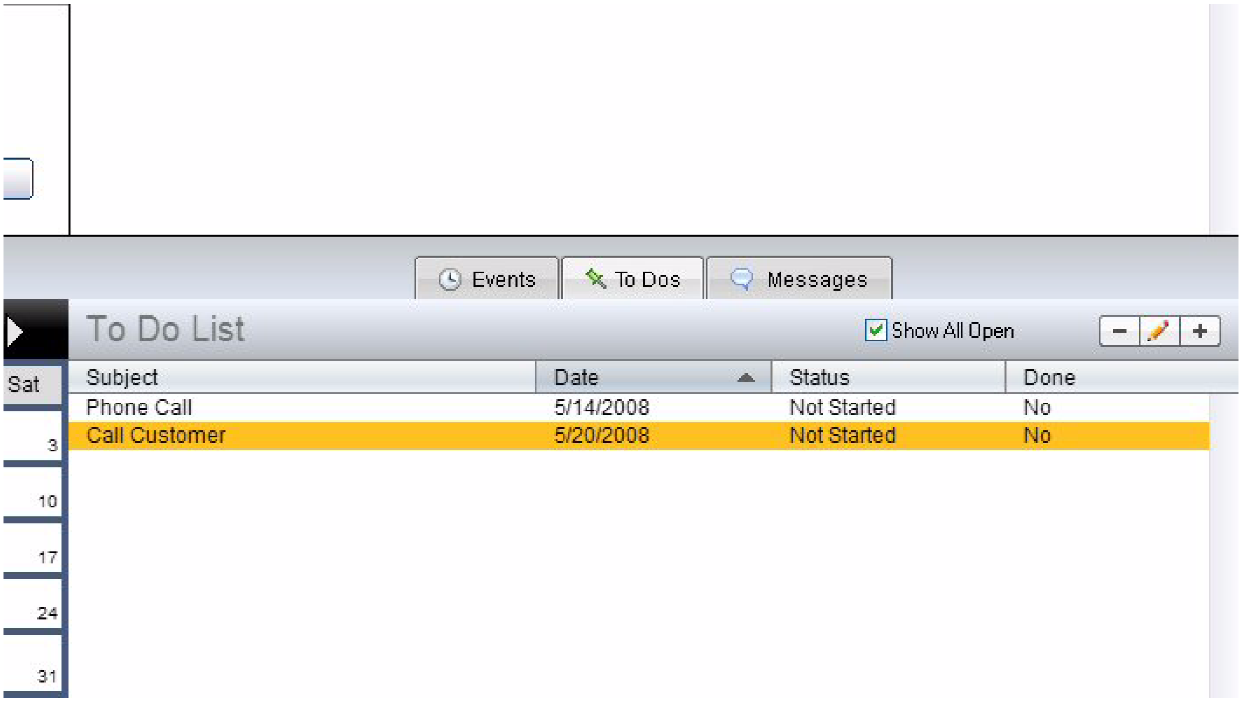


The **To Do** you created is displayed on the **To Do List**.

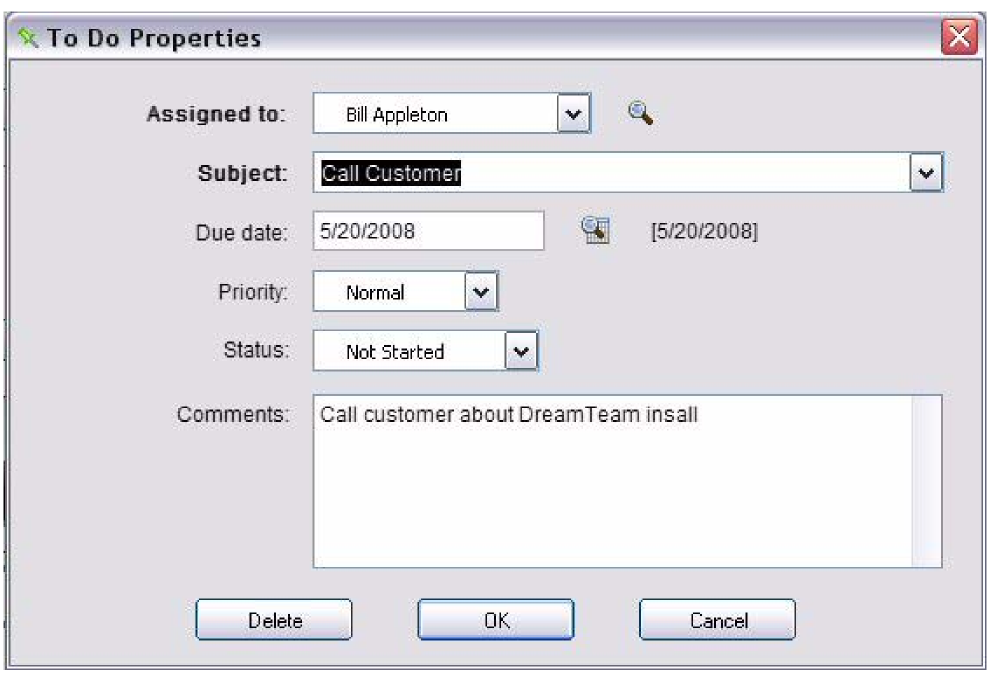
How to Edit a To Do

You may need to make changes to an existing To Do that is assigned to yourself or to another user. To edit the settings of an existing To Do, follow these steps;

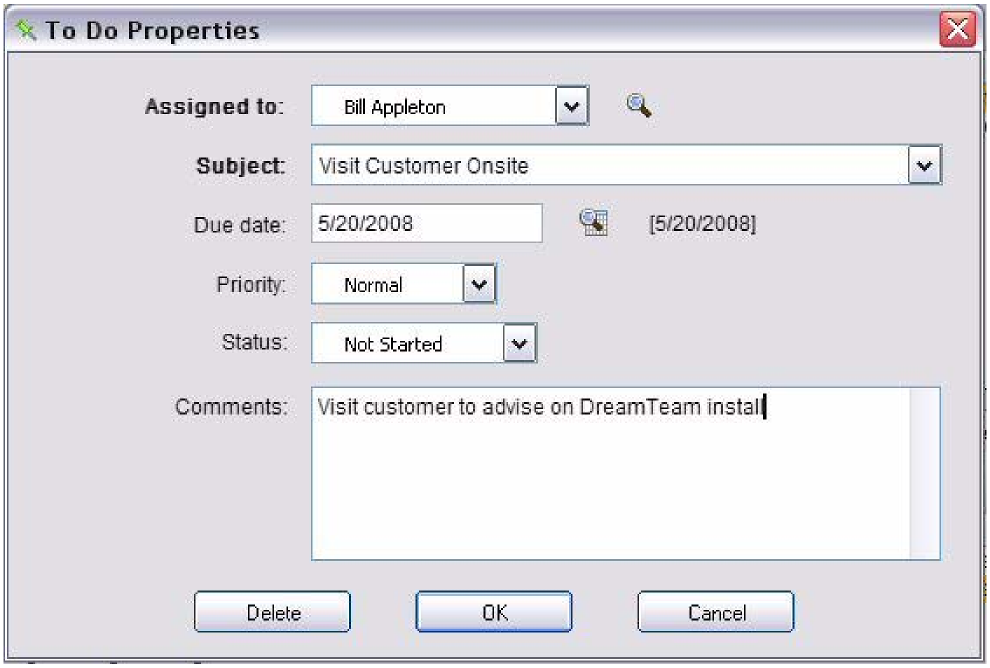
1. Select the **To Do** you want to edit from the **To Do List**.



2. Click on the **Pencil** icon on the right hand side of the screen. The **To Do Properties** dialog box is displayed.



3. Make any necessary changes to the current **To Do** settings in the dialog box. In this example, we will change the **Subject** and **Description** of the **To Do**.

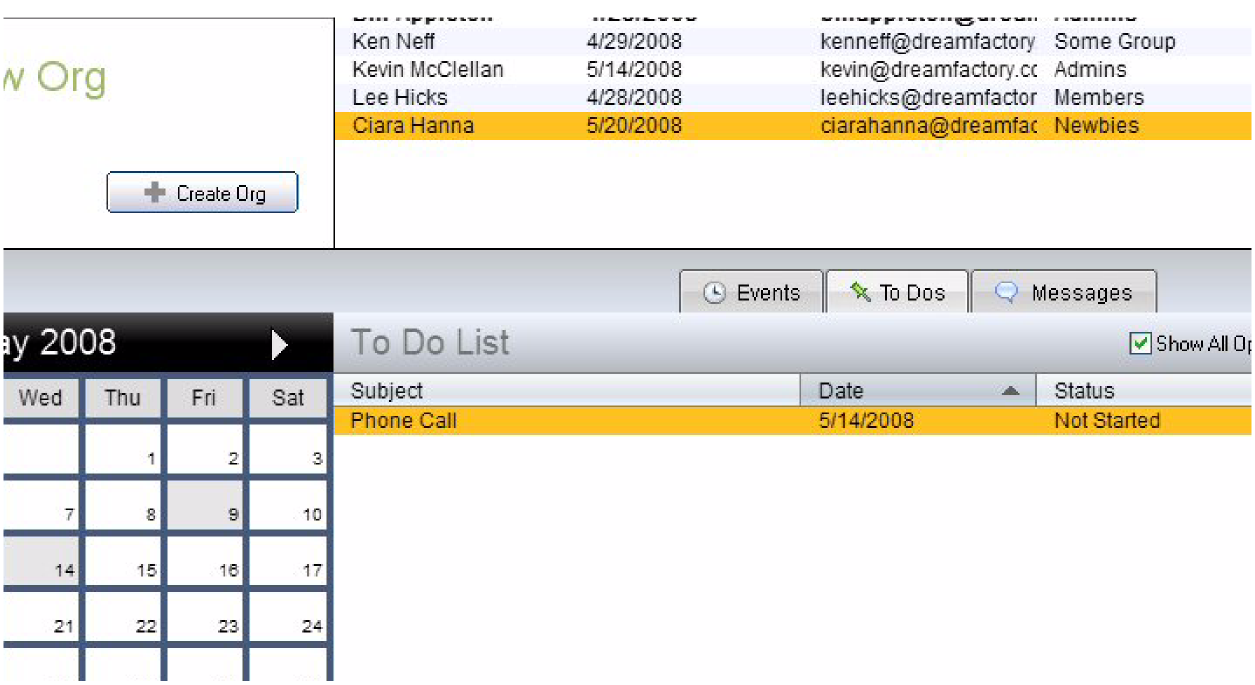


4. Click **OK** to save all the changes to the **To Do**. These changes will be updated on the users **To Do List**.

How to Delete a To Do

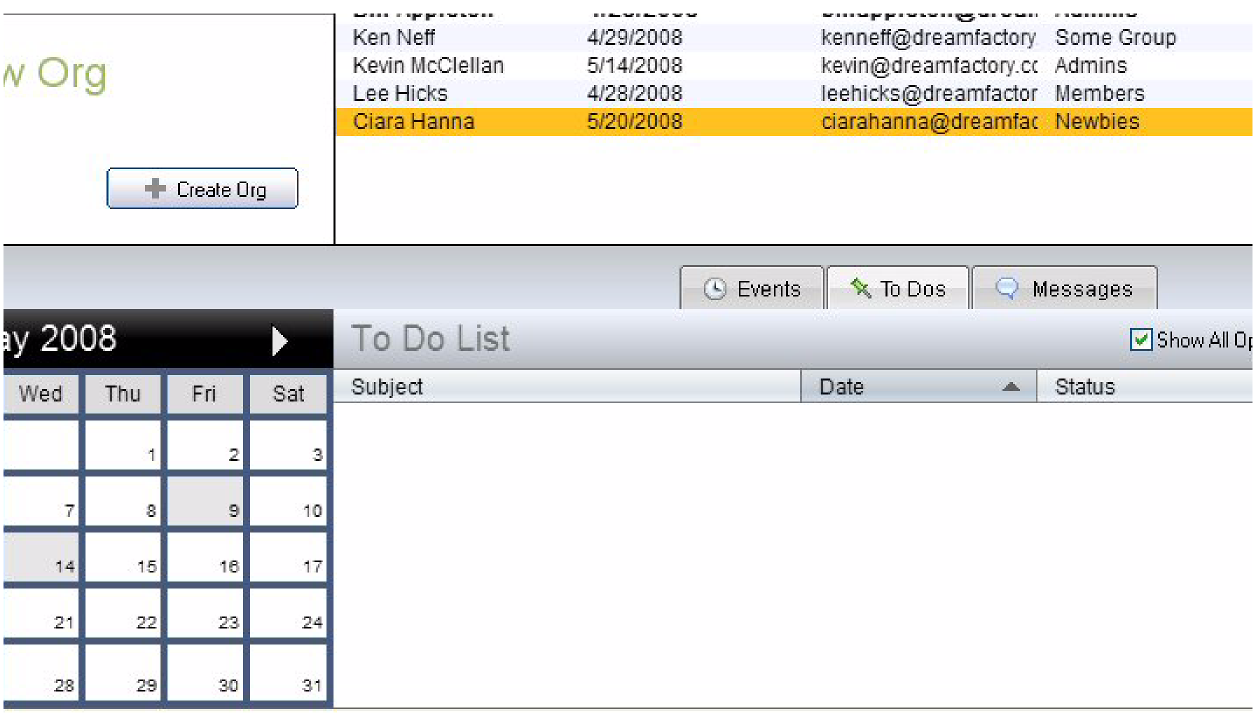
If you have the appropriate privileges, you can delete an existing **To Do**. To delete a **To Do**, follow these steps;

1. Select the **To Do** you want to delete from the **To Do List**.



2. Click on the **Minus (-)** icon on the right hand side of the screen. The **Delete To Do?** dialog box is displayed checking if you want to delete the **To Do**.

3. Click the **Delete** to confirm deletion. The **To Do** is deleted from the **To Do List**.



How to Create a Message

Messages are threaded discussions that allow Project Teams to collaborate as a group on specific projects, tasks or documents. You can create messages or on the Home Page. To create a **Message**, follow these steps;

1. Select the **Message** tab on the **Home Page**.

2. Click the **Plus (+)** icon on the right hand side of the screen. The **New Messages** dialog box is displayed.

3. Enter all the information for your new message in the appropriate fields.

4. Click **Save** to save your changes. Your new **Message** is displayed on the **User's Message** list on the **Home Page**.

H ow to Edit a Message

If you have the appropriate privileges, you can edit an existing **Message**. To edit a message, follow these steps;

1. Select the **Message** from the **Message list** on the **Home Page**.

2. Click the **Pencil** icon on the right hand side of the screen. The **Message Properties** dialog box is displayed.

3. Make any necessary changes to the existing **Message**.

4. Click **OK** to save all your changes to the existing message. The edited message is displayed on the **Message** list.

How to Delete a Message

If you have appropriate privileges, you can delete a message from the **Home Page**. To delete a **Message**, follow these steps;

1. Select the **Message** you want to delete from the **Messages** tab on the **Home Page**.

2. Click on the **Minus (-)** icon. The **Delete Message?** dialog box appears checking you want to delete the selected **Message**.

3. Click **Delete** to confirm deletion. The **Message** is removed from the **Messages** tab.