

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**.

The screenshot displays the Amazon Home Page interface. At the top, there are navigation links: Fullscreen, Applications, and Support. The main content area is divided into several sections:

- Invite A New User**: A section with a "+ Invite User" button.
- Create A New Org**: A section with a "+ Create Org" button.
- Users: DreamFactory Software**: A table listing users and their roles. The user "Bill Appleton" is highlighted.
- Calendar**: A calendar view for May 2008, with the 20th highlighted.
- Messages**: A section for managing messages, with a table showing message details.

Name	Joined	Email	Group	Role
Anthony Lin	5/13/2008	anthony@dreamf	Admins	Administrator
Ben Busse	4/28/2008	benbusse@dreamf	Members	Full Access
Bill Appleton	4/28/2008	billapleton@dreamf	Admins	Host
Ciara Hanna	5/20/2008	ciarahanna@dreamf	Newbies	Full Access
Ken Neff	4/29/2008	kenneff@dreamf	Some Group	Administrator
Kevin McClellan	5/14/2008	kevin@dreamfact	Admins	Administrator
Lee Hicks	4/28/2008	leehicks@dreamf	Members	Administrator

Name	Body	Sender	Read

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

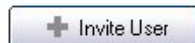
How to Create a New Org

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**.

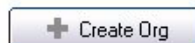
Invite A New User

Click the button at right to invite someone to join the current organization. Each user can be given a different role with different capabilities to access applications and data.



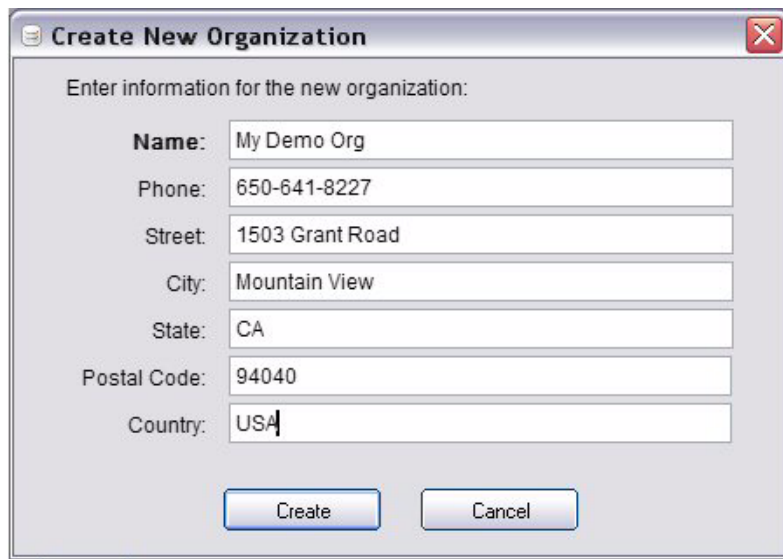
Create A New Org

Click the button at right to create a new Organization. Each Organization is a secure online place for your data, files, and projects. An organization can have any number of users.



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.



Create New Organization

Enter information for the new organization:

Name: My Demo Org

Phone: 650-641-8227

Street: 1503 Grant Road

City: Mountain View

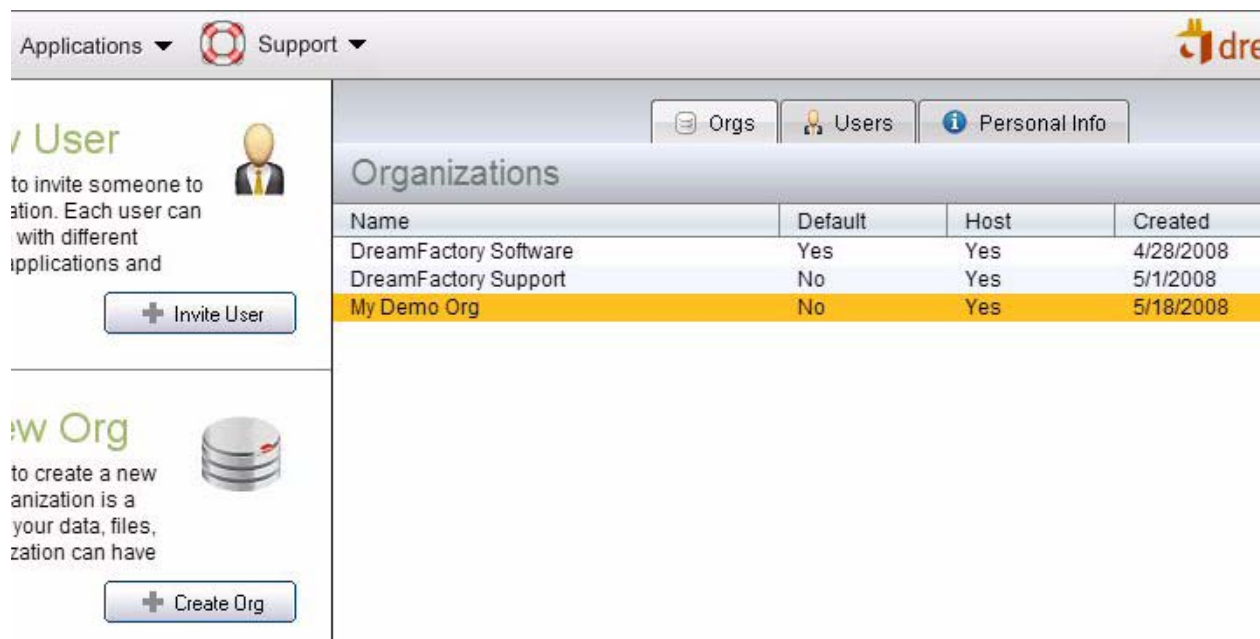
State: CA

Postal Code: 94040

Country: USA

Create **Cancel**

- 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**.



Applications ▾ Support ▾

User
to invite someone to
ation. Each user can
with different
applications and
+ Invite User

Org
to create a new
anization is a
your data, files,
zation can have
+ Create Org

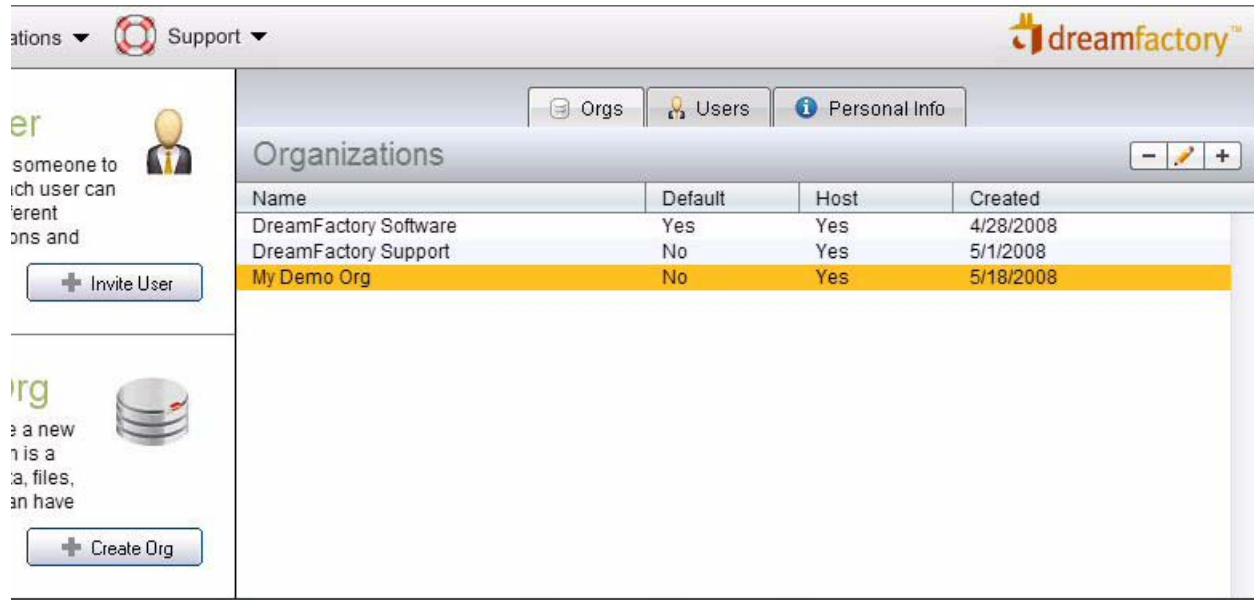
Organizations

Name	Default	Host	Created
DreamFactory Software	Yes	Yes	4/28/2008
DreamFactory Support	No	Yes	5/1/2008
My Demo Org	No	Yes	5/18/2008

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;

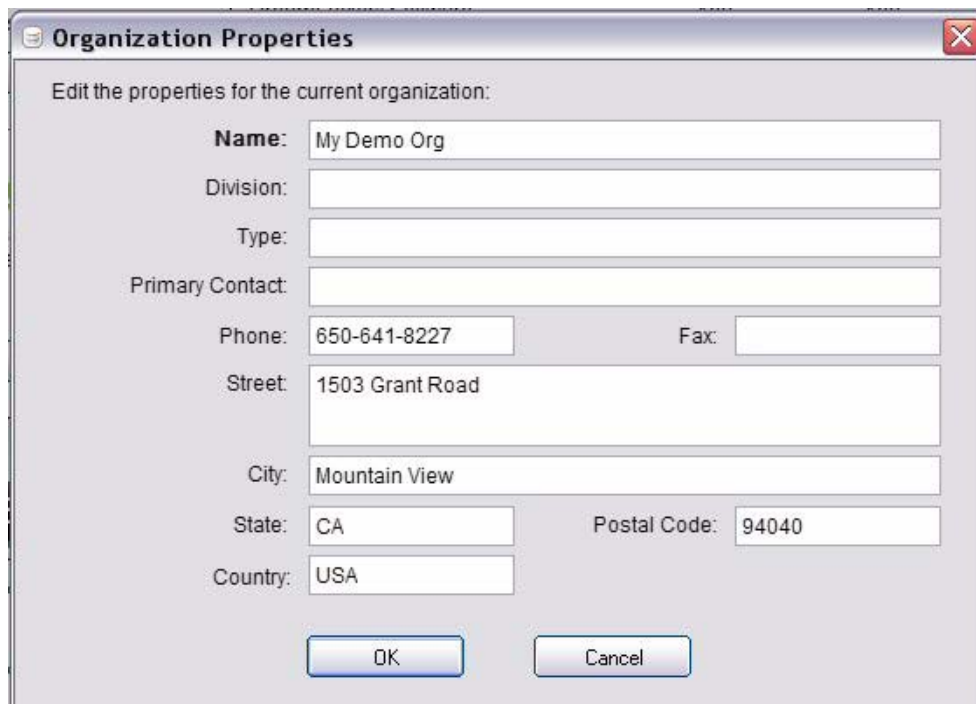
1. From the **Organizations** list, select the **Org** you want to edit.



The screenshot shows the DreamFactory web interface. At the top, there's a navigation bar with 'Organizations' and 'Support' menus, and the DreamFactory logo. Below the navigation bar, there's a sidebar on the left with a user profile section and a 'Create Org' button. The main content area is titled 'Organizations' and contains a table with columns: Name, Default, Host, and Created. The table lists three organizations: 'DreamFactory Software', 'DreamFactory Support', and 'My Demo Org'. 'My Demo Org' is highlighted in yellow. To the right of the table, there are icons for adding, editing, and deleting an organization.

Name	Default	Host	Created
DreamFactory Software	Yes	Yes	4/28/2008
DreamFactory Support	No	Yes	5/1/2008
My Demo Org	No	Yes	5/18/2008

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



The screenshot shows the 'Organization Properties' dialog box. It has a title bar with a close button. The main area is titled 'Edit the properties for the current organization:'. Below this, there are several input fields for organization details. The 'Name' field is filled with 'My Demo Org'. The 'Division' field is empty. The 'Type' field is empty. The 'Primary Contact' field is empty. The 'Phone' field is filled with '650-641-8227'. The 'Fax' field is empty. The 'Street' field is filled with '1503 Grant Road'. The 'City' field is filled with 'Mountain View'. The 'State' field is filled with 'CA'. The 'Postal Code' field is filled with '94040'. The 'Country' field is filled with 'USA'. At the bottom, there are 'OK' and 'Cancel' buttons.

Edit the properties for the current organization:

Name: My Demo Org

Division:

Type:

Primary Contact:

Phone: 650-641-8227 Fax:

Street: 1503 Grant Road

City: Mountain View

State: CA Postal Code: 94040

Country: USA

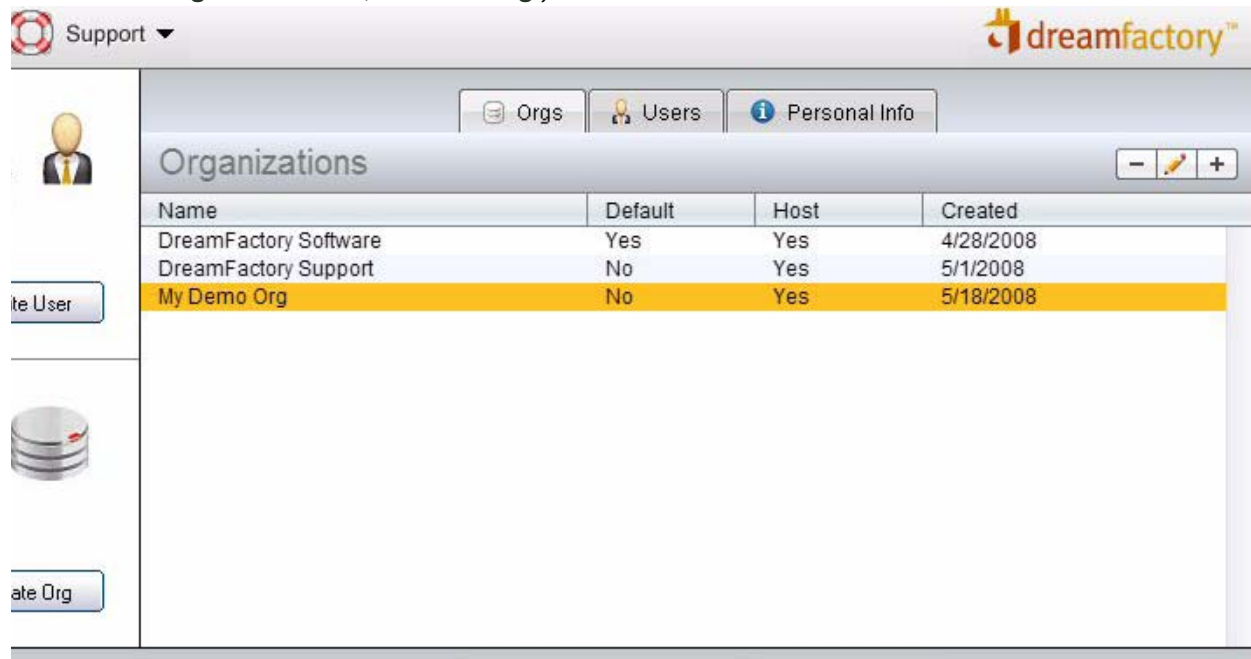
OK Cancel

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.



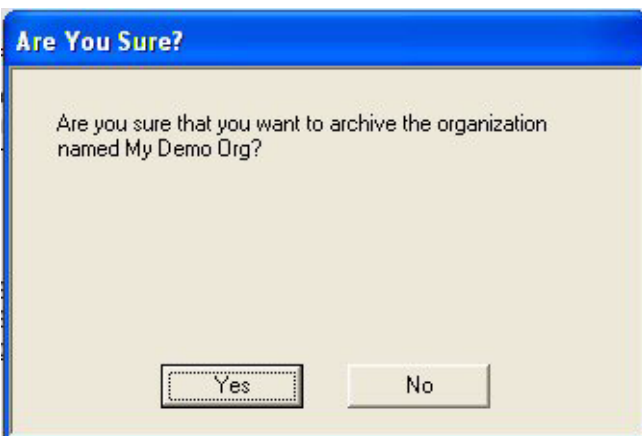
2. Click on the **Minus (-)** icon on the right hand side of the screen. The **Archive or Delete** dialog box is displayed.



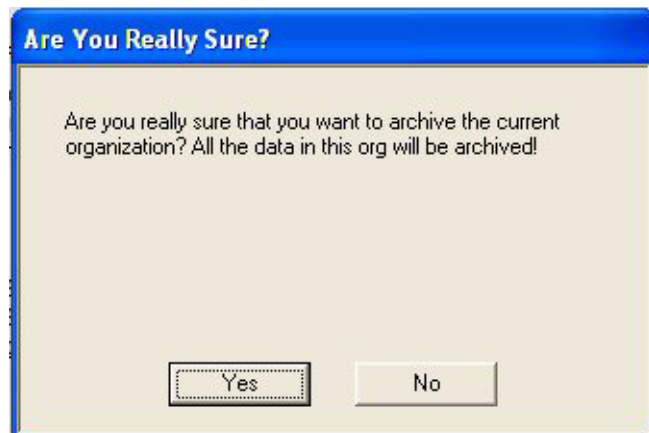
3. Select the **Archive this org and all data (host or admin)** radio button.



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;

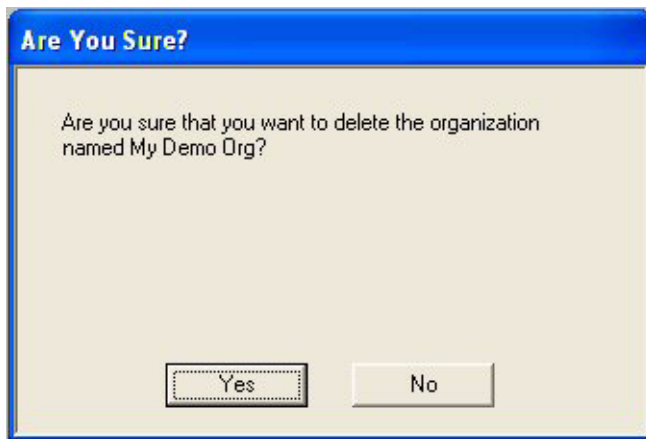
1. From the **Organization** list, select the **Org** you want to delete.
2. Click on the **Minus (-)** icon on the right hand side of the screen. The **Archive or Delete** dialog box is displayed.



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.



The screenshot shows the Amazon Home Page interface. On the left, there are two main sections: 'Invite A New User' and 'Create A New Org'. The 'Invite A New User' section includes a description and a '+ Invite User' button. The 'Create A New Org' section includes a description and a '+ Create Org' button. On the right, there is a table titled 'Organizations' with columns 'Name', 'Default', and 'Host'. The table lists three organizations: 'DreamFactory Software', 'DreamFactory Support', and 'My Demo Org'. The 'My Demo Org' row is highlighted in yellow.

Name	Default	Host
DreamFactory Software	Yes	Yes
DreamFactory Support	No	Yes
My Demo Org	No	Yes

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

Invite A New User

Enter some information about the user:

Email:

First Name: **Last Name:**

Subject Line:

Role: ☐ Send Web Service Email

Group: ☐ Launch Outlook Email Client

Hello {!Name},

Please join our organization by clicking the link below:
http://www.dreamfactory.net/amazon/enterprise_entrance.html?login={!login}

Sincerely,
{!Sender}

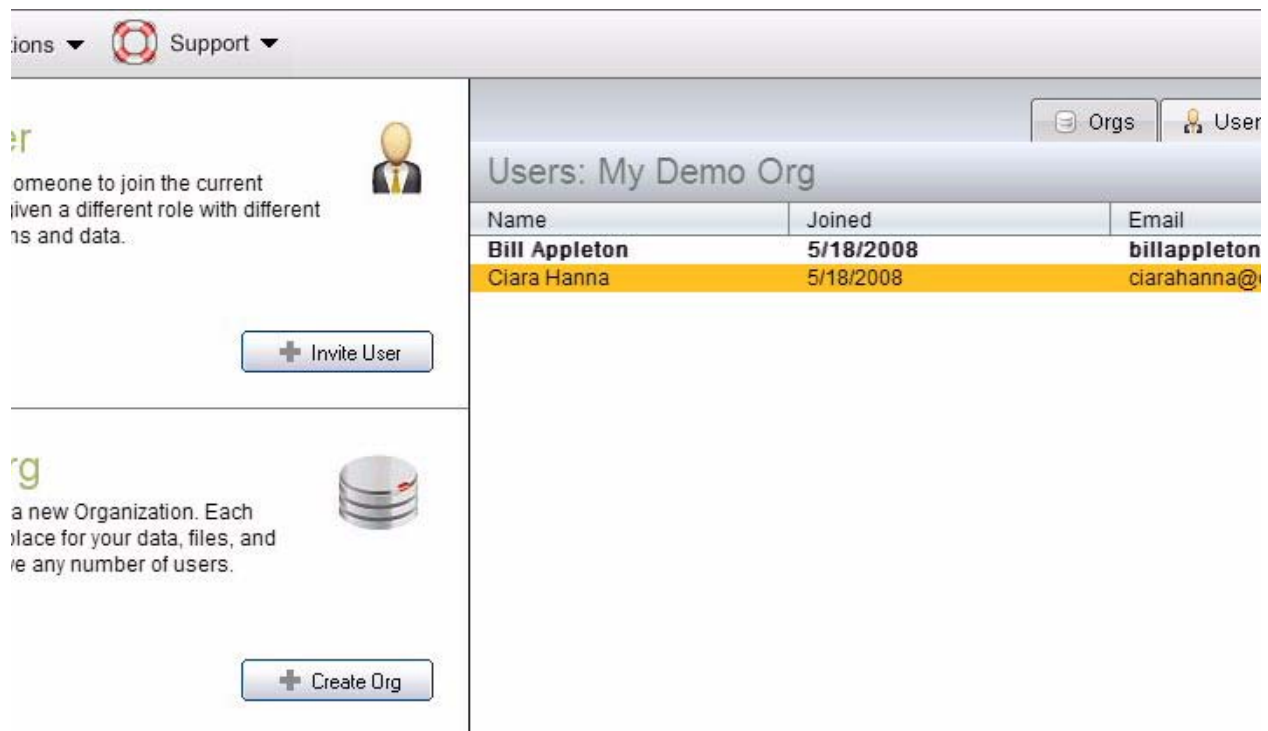
From here you can configure all the information contained in the invite to the user.

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	<p>Select the role the user will have in the new Org. You can choose from:</p> <ul style="list-style-type: none"> • 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. <p>Note: The Administrator role is not available on the Professional version of DreamTeam.</p> <p>In addition to the default roles, you can also create custom roles. For more information, see How to Create Custom User Roles.</p>
Group	<p>Select the Group to which you want to add the member. You can choose from;</p> <ul style="list-style-type: none"> • Admin • Newbies • Members <p>In addition to the three default groups, you can also create custom groups. For more information, see How to Create Custom User Groups.</p>
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.

- 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**.



Users: My Demo Org

Name	Joined	Email
Bill Appleton	5/18/2008	billappleton@
Ciara Hanna	5/18/2008	ciarahanna@

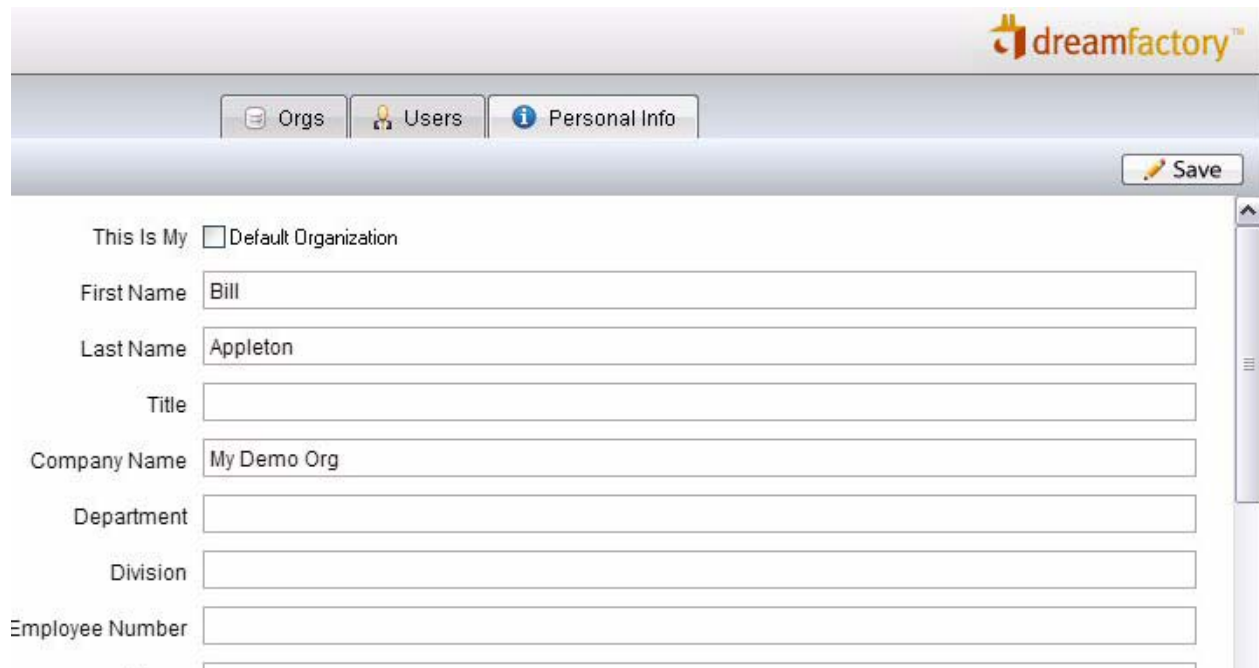
+ Invite User

+ Create Org

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.



dreamfactory™

Orgs Users Personal Info Save

This Is My ☐ Default Organization

First Name Bill

Last Name Appleton

Title

Company Name My Demo Org

Department

Division

Employee Number

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.

The screenshot shows the Amazon Home Page Users management interface. On the left, there are two sections: 'New User' with a description and an 'Invite User' button, and 'New Org' with a description and a 'Create Org' button. The main area is titled 'Users: My Demo Org' and contains a table with columns: Name, Joined, Email, and Group. The table lists two users: Bill Appleton and Ciara Hanna. The 'Ciara Hanna' row is highlighted in yellow.

Name	Joined	Email	Group
Bill Appleton	5/18/2008	billappleton@dreamfz	Admins
Ciara Hanna	5/18/2008	ciarahanna@dreamfz	Newbies

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

The screenshot shows the 'User Properties' dialog box. The title bar says 'User Properties'. The main text says 'Edit the properties for the selected user: Ciara Hanna'. There are two sections: 'Role' and 'Group'. The 'Role' section has a dropdown menu set to 'Full Access' and an 'Edit Roles' button. The 'Group' section has a dropdown menu set to 'Newbies' and an 'Edit Groups' button. Below these are several text input fields: 'Company', 'Department', 'Division', 'Employee Number', 'Title', and 'Type'. At the bottom are 'OK' and 'Cancel' buttons.

Role: Full Access

Group: Newbies

Company:

Department:

Division:

Employee Number:

Title:

Type:

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

User Properties

Edit the properties for the selected user: Ciara Hanna

Role:

Group:

Company:

Department:

Division:

Employee Number:

Title:

Type:

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

Applications ▼ Support ▼

New User
Right to invite someone to organization. Each user can role with different ss applications and

New Org
Right to create a new Organization is a for your data, files, organization can have S.

Orgs Users Personal Info

Users: My Demo Org

Name	Joined	Email	Group
Bill Appleton	5/18/2008	billappleton@drea	Admins
Ciara Hanna	5/18/2008	ciarahanna@dreamfa	Admins

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.

The screenshot shows the Amazon Home Page interface. On the left, there are two sections: 'New User' with a description 'Right to invite someone to Amazon. Each user can have a role with different permissions across applications and services' and a '+ Invite User' button; and 'New Org' with a description 'Right to create a new Organization is a container for your data, files, and applications. An organization can have multiple users.' and a '+ Create Org' button. On the right, there is a 'Users: My Demo Org' section with a table of users. The table has columns: Name, Joined, Email, and Group. The first row is 'Bill Appleton', '5/18/2008', 'billappleton@amazon.com', and 'Admins'. The second row is 'Ciara Hanna', '5/18/2008', 'ciarahanna@amazon.com', and 'Newbies'. The second row is highlighted in yellow. Above the table are tabs for 'Orgs', 'Users', and 'Personal Info'.

Name	Joined	Email	Group
Bill Appleton	5/18/2008	billappleton@amazon.com	Admins
Ciara Hanna	5/18/2008	ciarahanna@amazon.com	Newbies

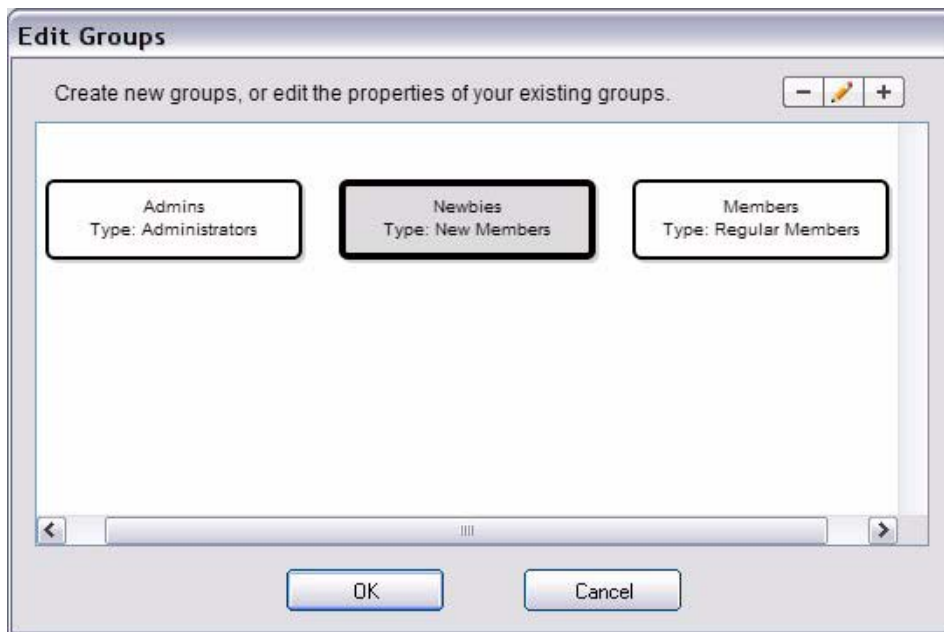
2. Click on the **Pencil**. The **User Properties** dialog box is displayed.

The screenshot shows the 'User Properties' dialog box. The title bar says 'User Properties'. The main text says 'Edit the properties for the selected user: Ciara Hanna'. There are two dropdown menus: 'Role' with 'Full Access' selected and 'Group' with 'Newbies' selected. To the right of each dropdown is a button: 'Edit Roles' and 'Edit Groups'. Below these are several text input fields: 'Company:', 'Department:', 'Division:', 'Employee Number:', 'Title:', and 'Type:'. At the bottom are 'OK' and 'Cancel' buttons.

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

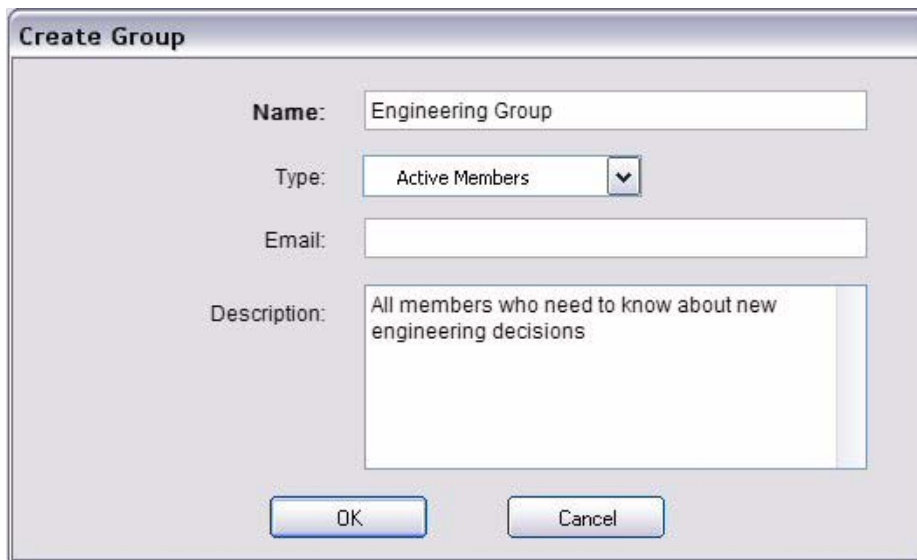
is the group the current selected user is assigned to.



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

The 'Create Group' dialog box has a title bar with the text 'Create Group'. It contains four input fields: 'Name:' (text box), 'Type:' (dropdown menu with 'Regular Members' selected), 'Email:' (text box), and 'Description:' (text area). At the bottom are 'OK' and 'Cancel' buttons.

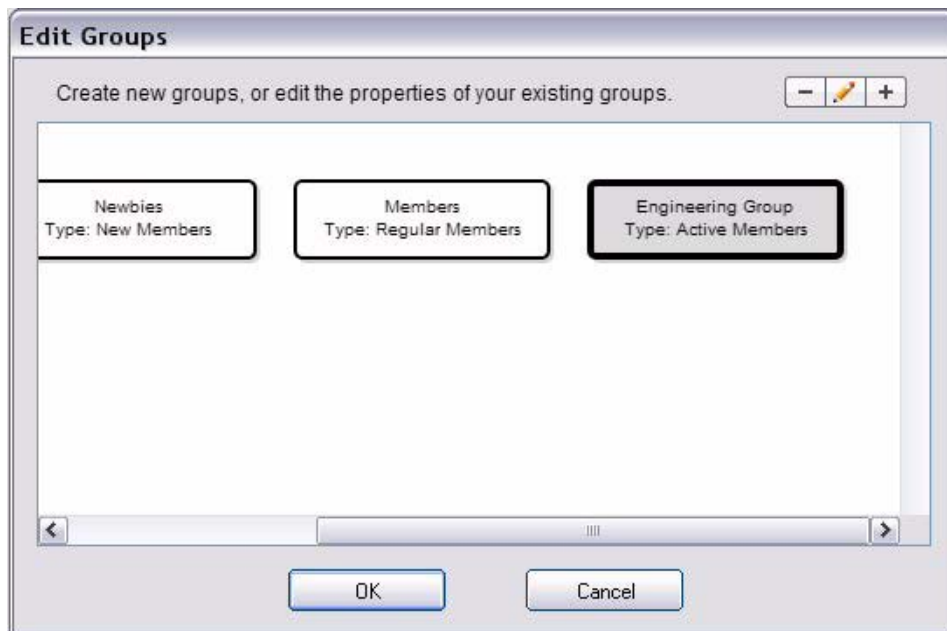
5. Type a new name for the group in the **Name** field. This field is mandatory.



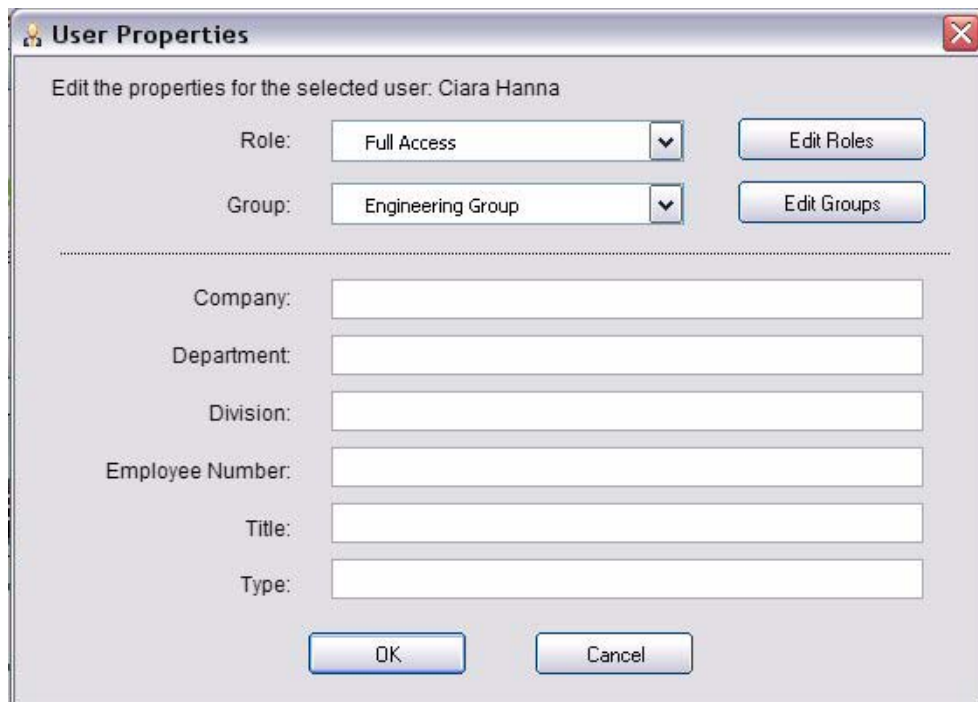
The image shows a 'Create Group' dialog box with a light purple border. It contains four input fields: 'Name' with the text 'Engineering Group', 'Type' with a dropdown menu showing 'Active Members', 'Email' which is empty, and 'Description' with the text 'All members who need to know about new engineering decisions'. At the bottom are 'OK' and 'Cancel' buttons.

Create Group
Name: <input type="text" value="Engineering Group"/>
Type: <input style="border: none; border-bottom: 1px solid black; padding: 2px 10px;" type="text" value="Active Members"/> ▼
Email: <input type="text"/>
Description: <div style="border: 1px solid black; padding: 5px; min-height: 80px;">All members who need to know about new engineering decisions</div>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>

6. Select a group **Type** from the drop-down list. Your 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.



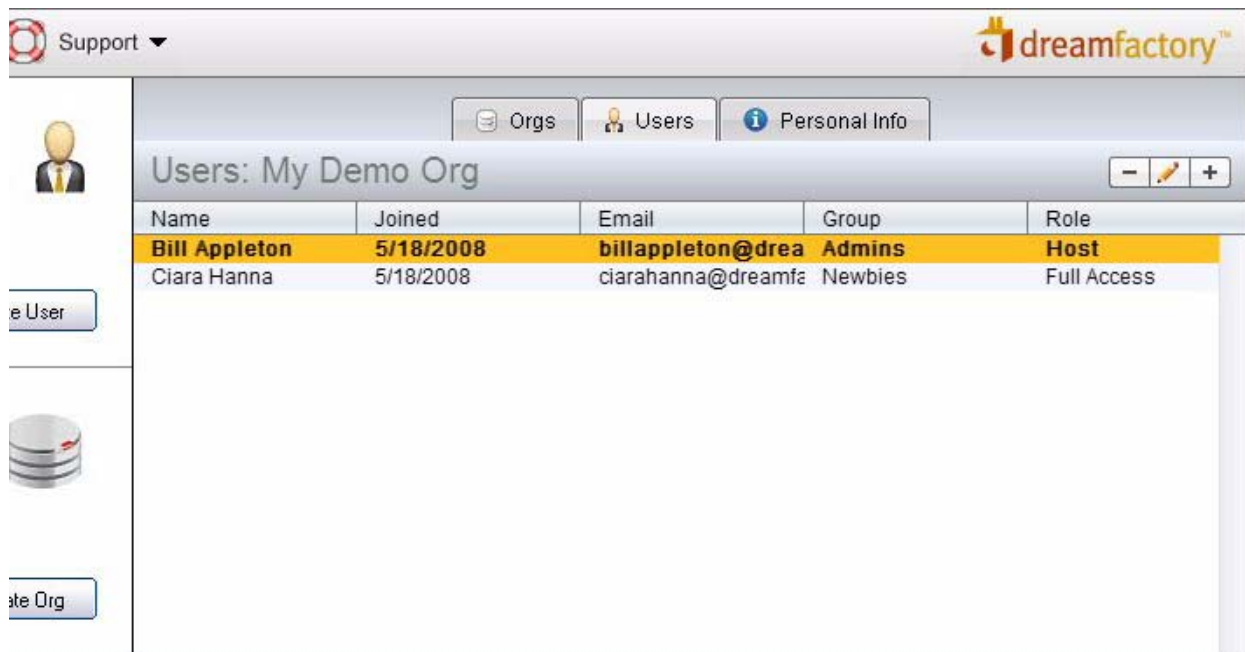
10. Click **OK** to close the **Edit Groups** dialog box. The new group is now a selectable option from the drop-down list. Users can now be easily added to the 'Engineering Group'.



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.

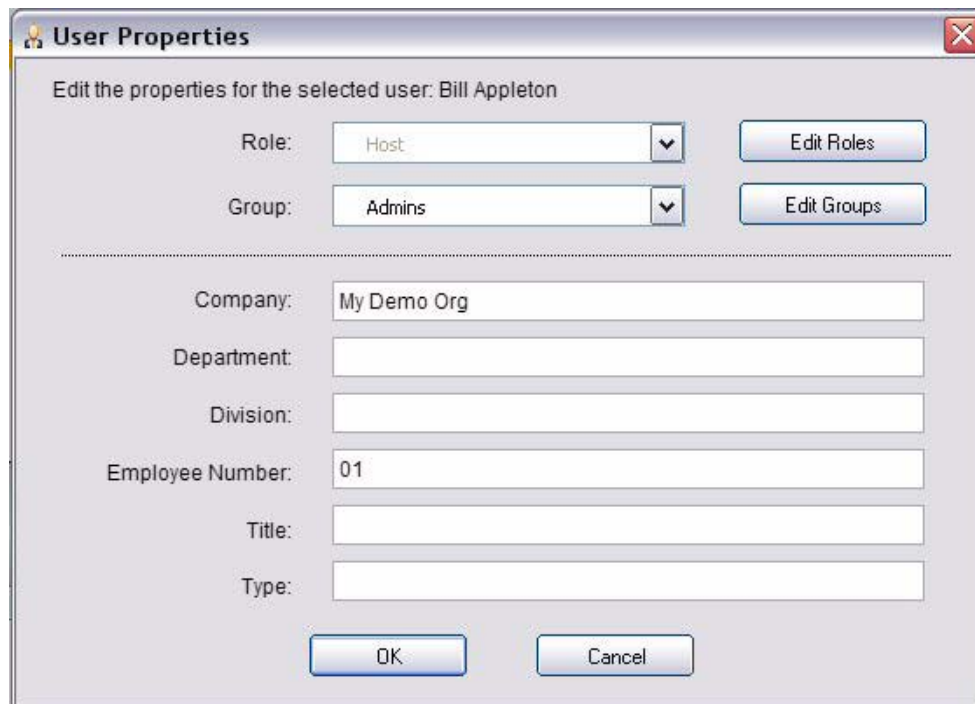
1. Select a **User** from the Users list.



The screenshot shows the DreamFactory web interface. At the top, there is a 'Support' link and the DreamFactory logo. Below the header, there are tabs for 'Orgs', 'Users', and 'Personal Info'. The 'Users' tab is selected, and the page title is 'Users: My Demo Org'. On the left sidebar, there are icons for a user, a database, and an organization, with corresponding buttons 'e User', 'e Org', and 'e Org'. The main content area displays a table of users:

Name	Joined	Email	Group	Role
Bill Appleton	5/18/2008	billappleton@drea	Admins	Host
Ciara Hanna	5/18/2008	ciarahanna@dreamfa	Newbies	Full Access

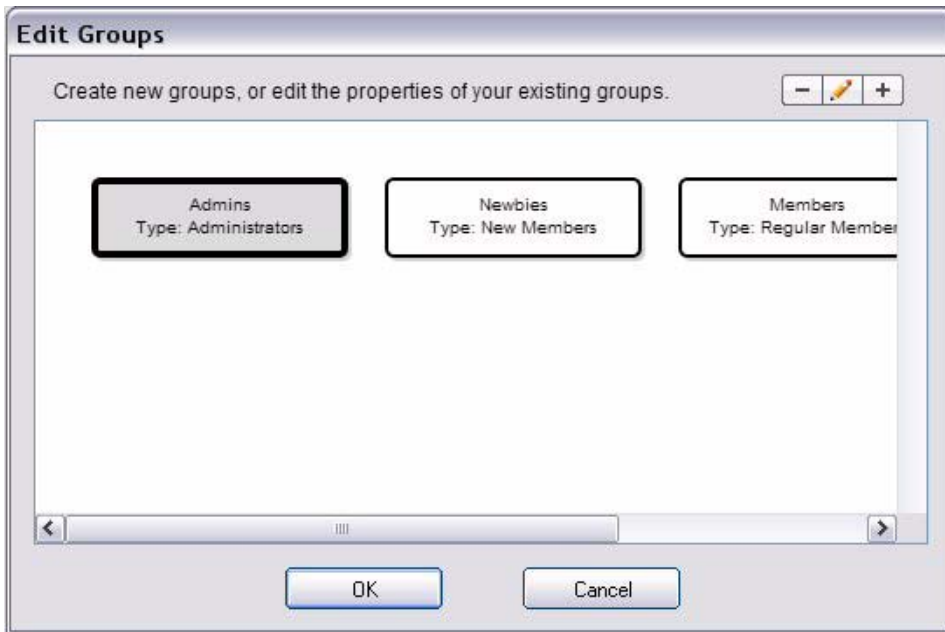
2. Click on the **Pencil** icon. The **User Properties** dialog is displayed.



The 'User Properties' dialog box is shown, titled 'User Properties' with a close button (X). The subtitle is 'Edit the properties for the selected user: Bill Appleton'. The dialog contains the following fields and buttons:

- Role:** A dropdown menu showing 'Host' and an 'Edit Roles' button.
- Group:** A dropdown menu showing 'Admins' and an 'Edit Groups' button.
- Company:** A text field containing 'My Demo Org'.
- Department:** An empty text field.
- Division:** An empty text field.
- Employee Number:** A text field containing '01'.
- Title:** An empty text field.
- Type:** An empty text field.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

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.

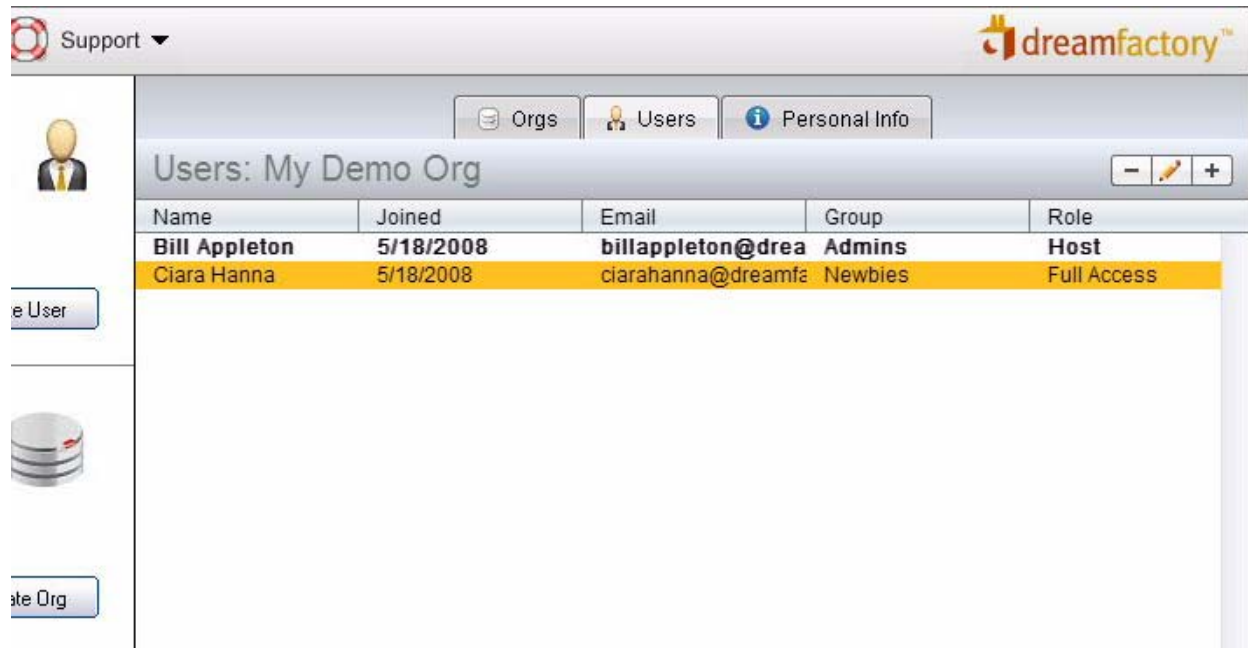


5. Make any necessary changes to the properties of the group in the dialog box and click **OK**. Your changes are saved to the Group.

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;

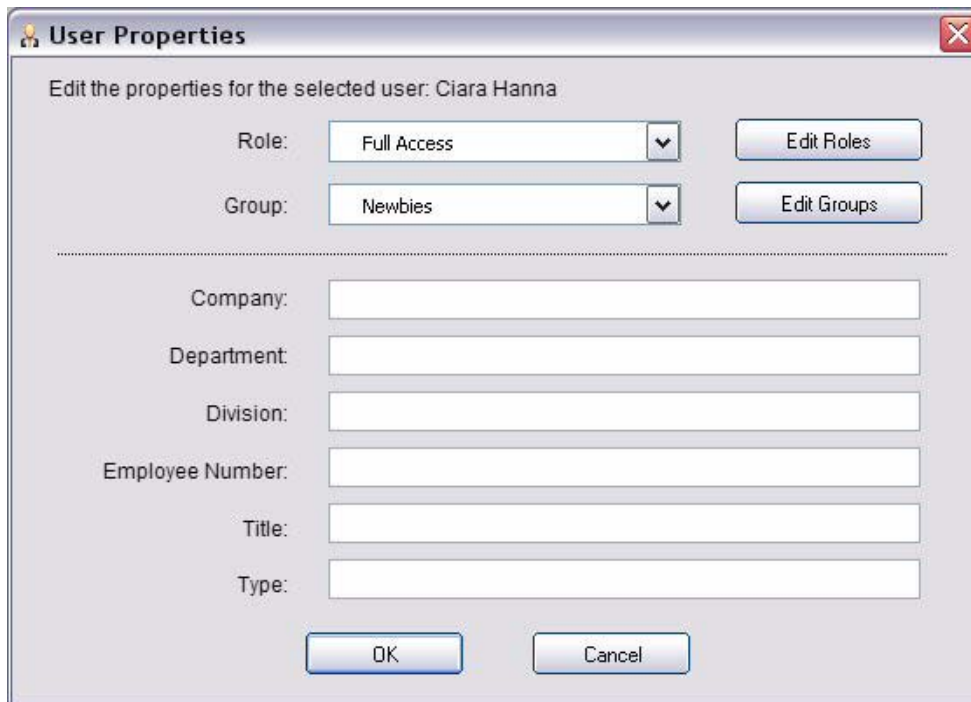
1. Select a **User** you want to delete from the Users list.



The screenshot shows the DreamFactory web interface. At the top, there's a 'Support' dropdown and the 'dreamfactory' logo. Below the header, there are tabs for 'Orgs', 'Users', and 'Personal Info'. The main section is titled 'Users: My Demo Org' and contains a table of users. The table has columns for Name, Joined, Email, Group, and Role. Two users are listed: Bill Appleton and Ciara Hanna. Ciara Hanna's row is highlighted in yellow. On the left sidebar, there are icons for a user, a database, and an organization, with corresponding buttons 'e User', 'e Org', and 'e Org'.

Name	Joined	Email	Group	Role
Bill Appleton	5/18/2008	billappleton@dreamfactory.com	Admins	Host
Ciara Hanna	5/18/2008	ciarahanna@dreamfactory.com	Newbies	Full Access

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



The screenshot shows the 'User Properties' dialog box. The title bar says 'User Properties' with a close button. The main text says 'Edit the properties for the selected user: Ciara Hanna'. There are two dropdown menus: 'Role' (set to 'Full Access') and 'Group' (set to 'Newbies'). Next to each dropdown is a button: 'Edit Roles' and 'Edit Groups'. Below these are several text input fields: 'Company:', 'Department:', 'Division:', 'Employee Number:', 'Title:', and 'Type:'. At the bottom are 'OK' and 'Cancel' buttons.

Edit the properties for the selected user: Ciara Hanna

Role: Full Access

Group: Newbies

Company:

Department:

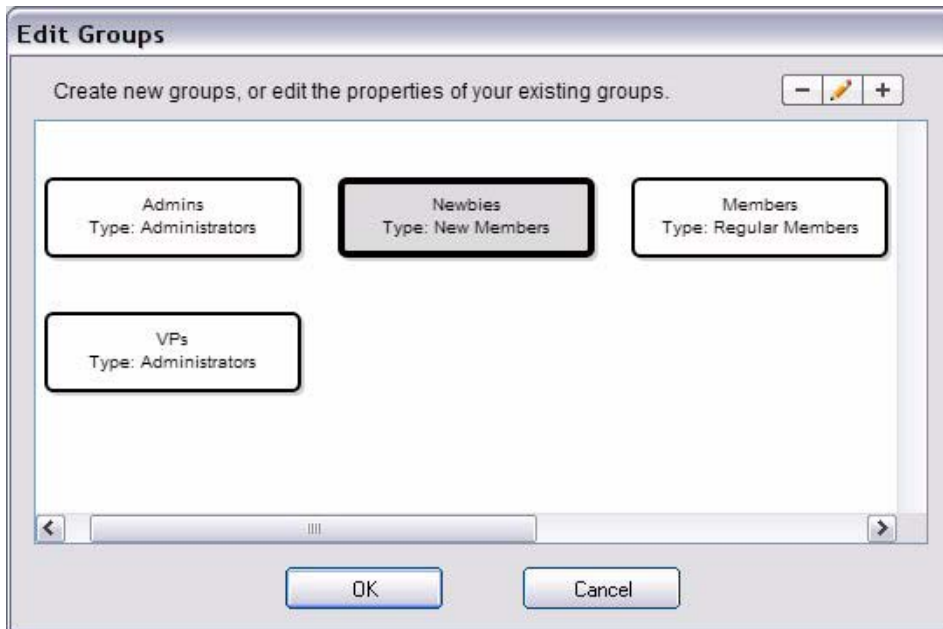
Division:

Employee Number:

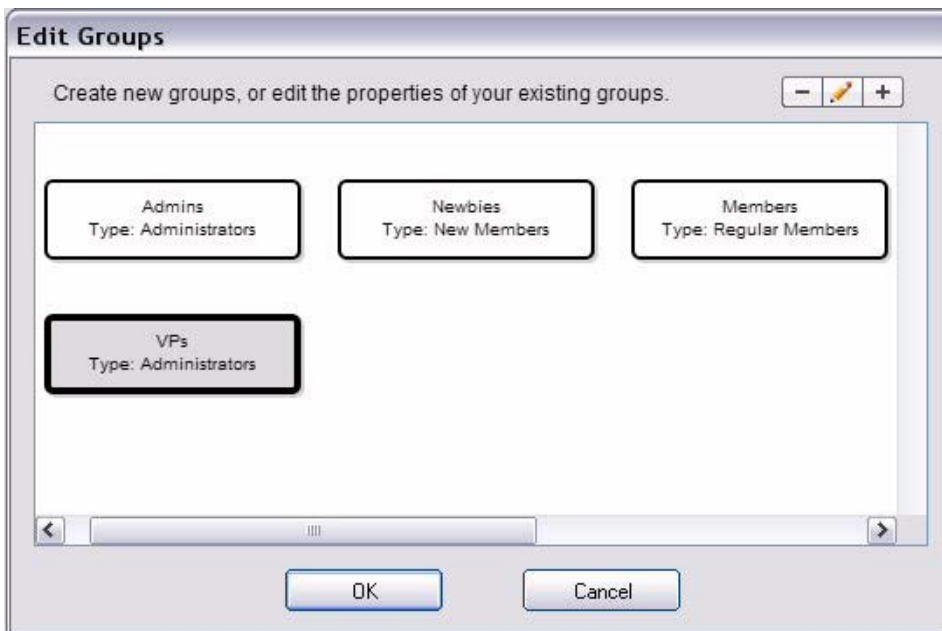
Title:

Type:

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



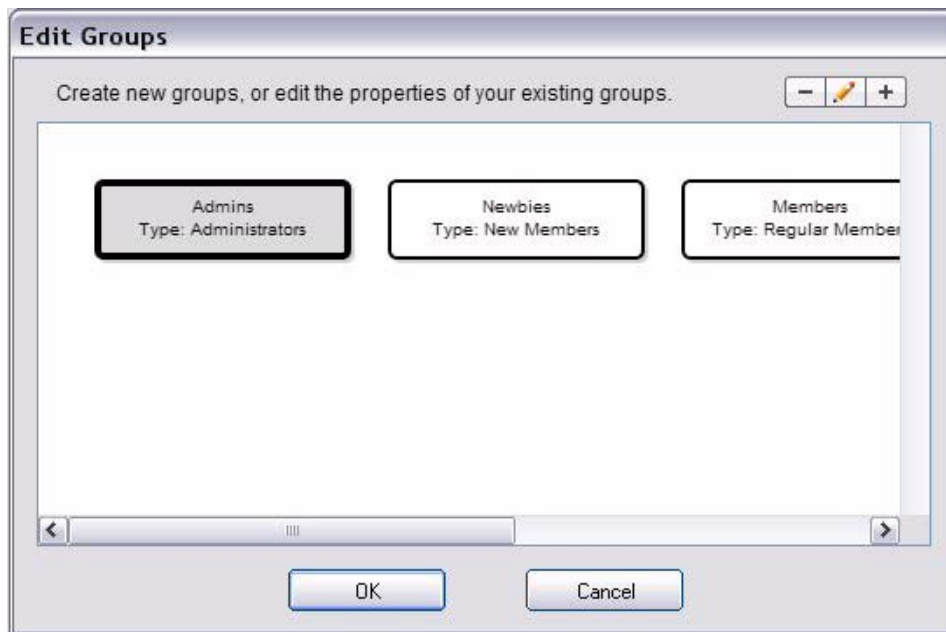
4. Select the **Group** you want to delete and then click on the **Minus** icon.



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

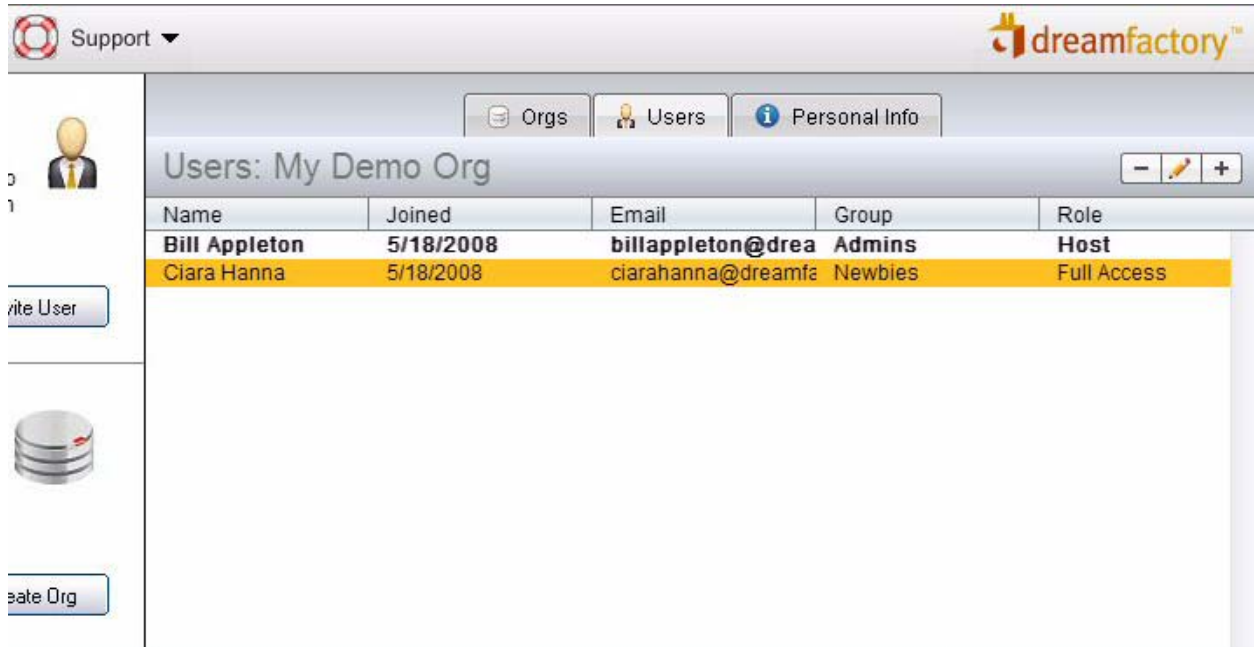
A Role determines what type of access a User has in an Org and what privileges they have been assigned. There are seven default User Roles in DreamTeam. The default user roles are;

- **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.

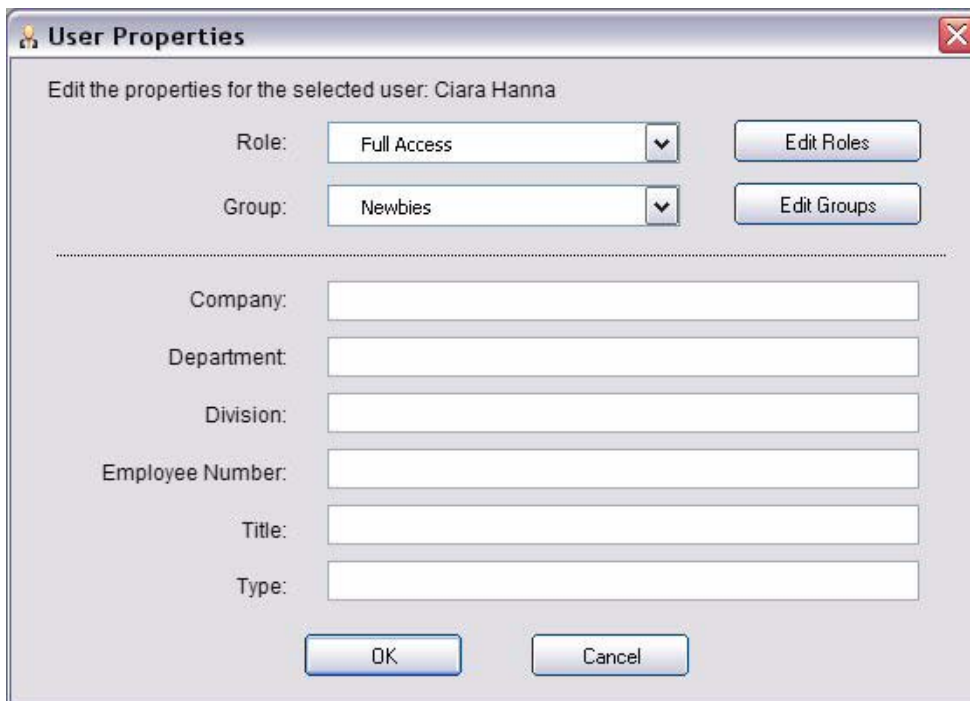


The screenshot shows the DreamFactory web interface. At the top, there's a 'Support' dropdown and the 'dreamfactory' logo. Below the header, there are tabs for 'Orgs', 'Users', and 'Personal Info'. The main section is titled 'Users: My Demo Org' and contains a table with the following data:

Name	Joined	Email	Group	Role
Bill Appleton	5/18/2008	billappleton@drea	Admins	Host
Ciara Hanna	5/18/2008	ciarahanna@dreamfa	Newbies	Full Access

On the left side, there's a sidebar with a user icon, a 'Invite User' button, a database icon, and a 'Create Org' button.

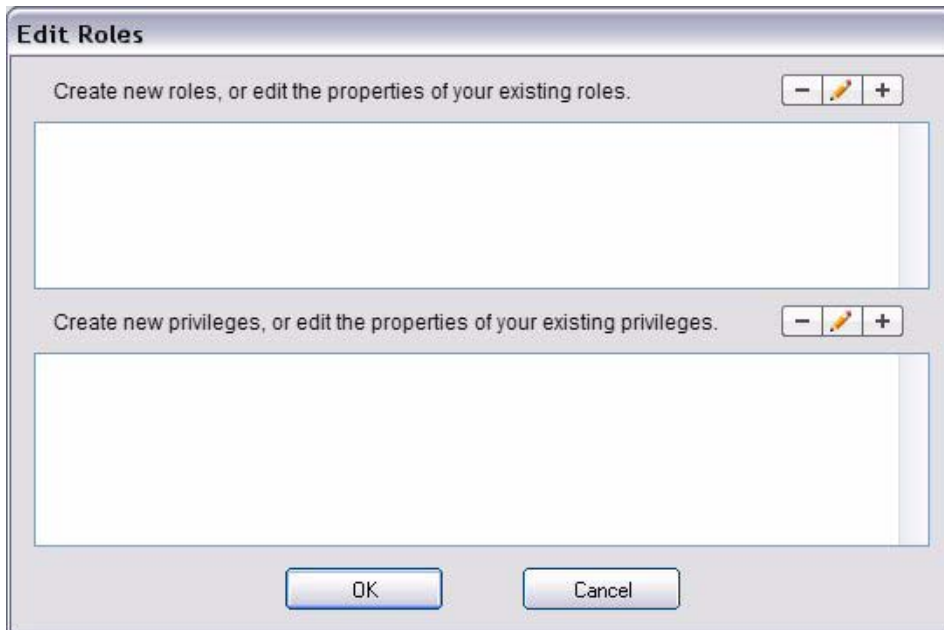
2. Click the **Pencil** icon. The **User Properties** dialog box is displayed.



The 'User Properties' dialog box is shown, titled 'User Properties' with a close button. It contains the text 'Edit the properties for the selected user: Ciara Hanna'. The form has the following fields and buttons:

- Role:** A dropdown menu showing 'Full Access' and an 'Edit Roles' button.
- Group:** A dropdown menu showing 'Newbies' and an 'Edit Groups' button.
- Company:** A text input field.
- Department:** A text input field.
- Division:** A text input field.
- Employee Number:** A text input field.
- Title:** A text input field.
- Type:** A text input field.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

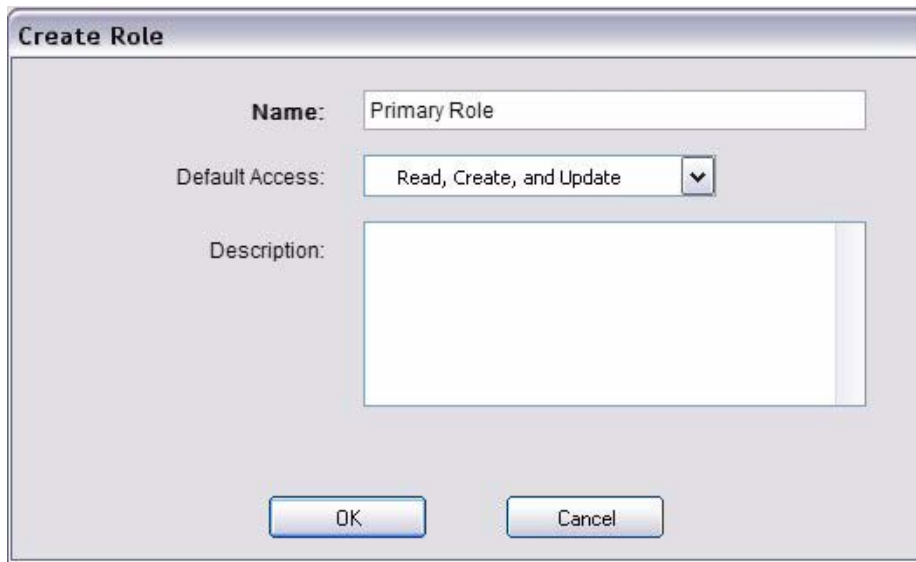
3. Click **Edit Roles**. The **Edit Roles** dialog box is displayed.



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

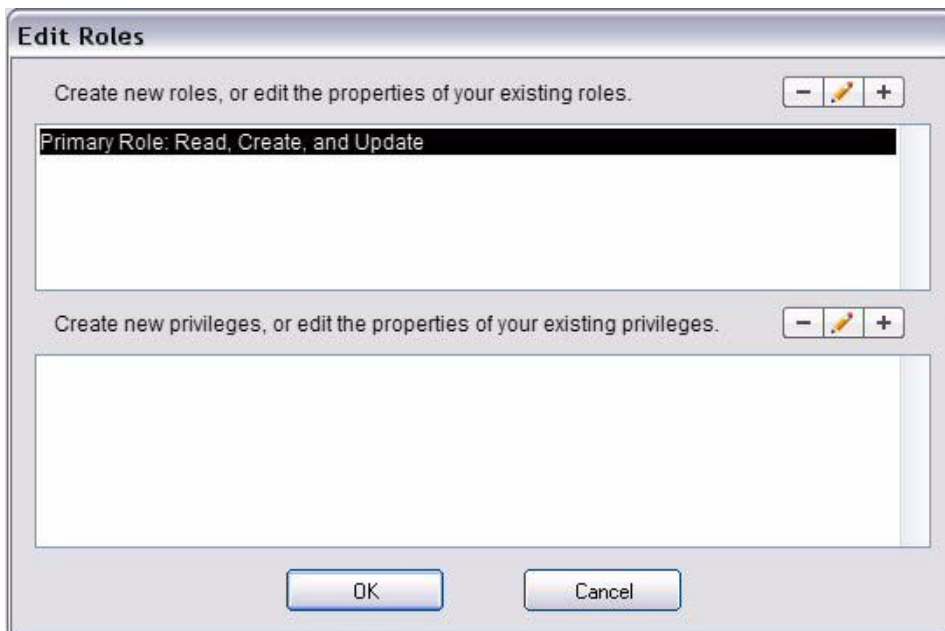


5. Type a name for the custom role in the **Name** text box.



The **Create Role** dialog box is shown. It has a title bar with the text "Create Role". Inside, there are three fields: "Name:" with a text box containing "Primary Role", "Default Access:" with a dropdown menu showing "Read, Create, and Update", and "Description:" with a large empty text area. At the bottom, there are two buttons: "OK" and "Cancel".

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.



The **Edit Roles** dialog box is shown. It has a title bar with the text "Edit Roles". Inside, there is a section titled "Create new roles, or edit the properties of your existing roles." with a list box containing "Primary Role: Read, Create, and Update". To the right of the list box are three buttons: a minus sign, an edit icon (pencil), and a plus sign. Below this is another section titled "Create new privileges, or edit the properties of your existing privileges." with an empty list box and the same three buttons (minus, edit, plus). At the bottom, there are two buttons: "OK" and "Cancel".

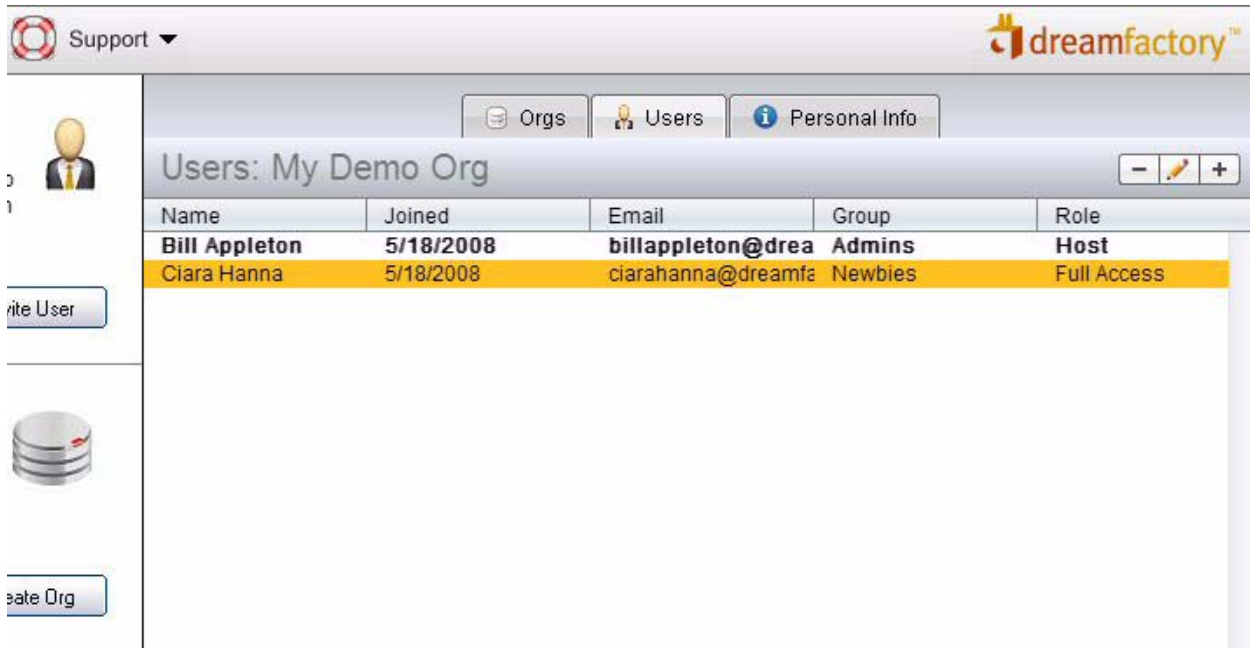
8. Click **OK** to save all your changes to the custom role and close the dialog box.

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;

Amazon Home Page Quick Start Guide

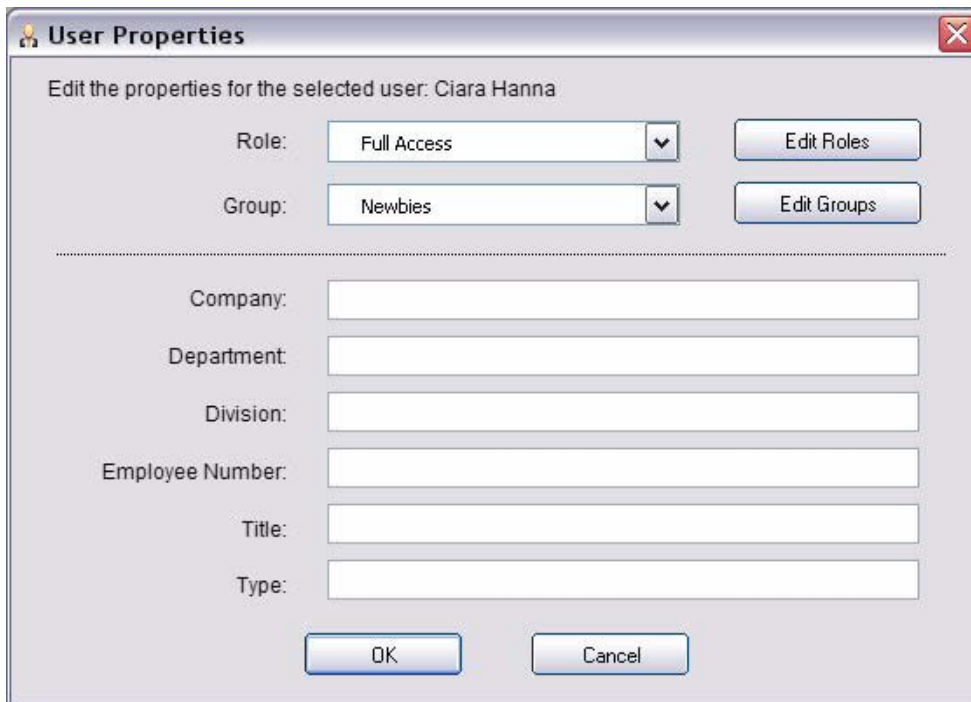
1. Select the User Role you want to edit from the first section of the Edit Roles dialog box.
2. Select a **User** from the Users section.



The screenshot shows the DreamFactory web interface. At the top, there is a 'Support' dropdown and the DreamFactory logo. Below this is a navigation bar with 'Orgs', 'Users', and 'Personal Info' tabs. The main section is titled 'Users: My Demo Org' and contains a table of users. The table has columns for Name, Joined, Email, Group, and Role. Two users are listed: Bill Appleton (Admins, Host) and Ciara Hanna (Newbies, Full Access). The 'Ciara Hanna' row is highlighted in yellow. On the left sidebar, there is a 'Write User' button and a 'Delete Org' button.

Name	Joined	Email	Group	Role
Bill Appleton	5/18/2008	billappleton@drea	Admins	Host
Ciara Hanna	5/18/2008	ciarahanna@dreamf	Newbies	Full Access

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



The 'User Properties' dialog box is shown, titled 'Edit the properties for the selected user: Ciara Hanna'. It contains several fields and buttons. The 'Role' field is set to 'Full Access' and the 'Group' field is set to 'Newbies'. There are 'Edit Roles' and 'Edit Groups' buttons next to these fields. Below these, there are input fields for 'Company', 'Department', 'Division', 'Employee Number', 'Title', and 'Type'. At the bottom, there are 'OK' and 'Cancel' buttons.

Role: Full Access

Group: Newbies

Company:

Department:

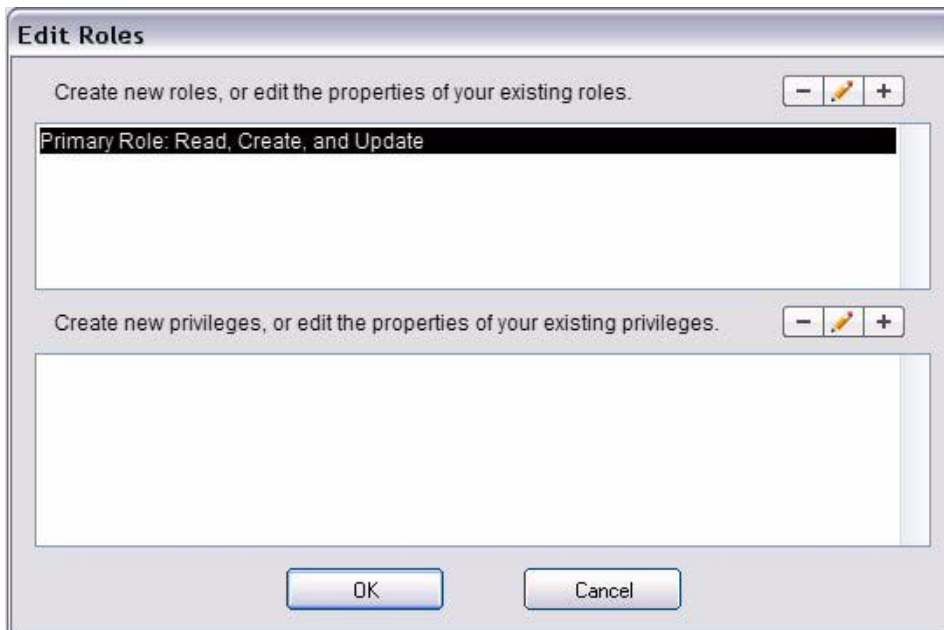
Division:

Employee Number:

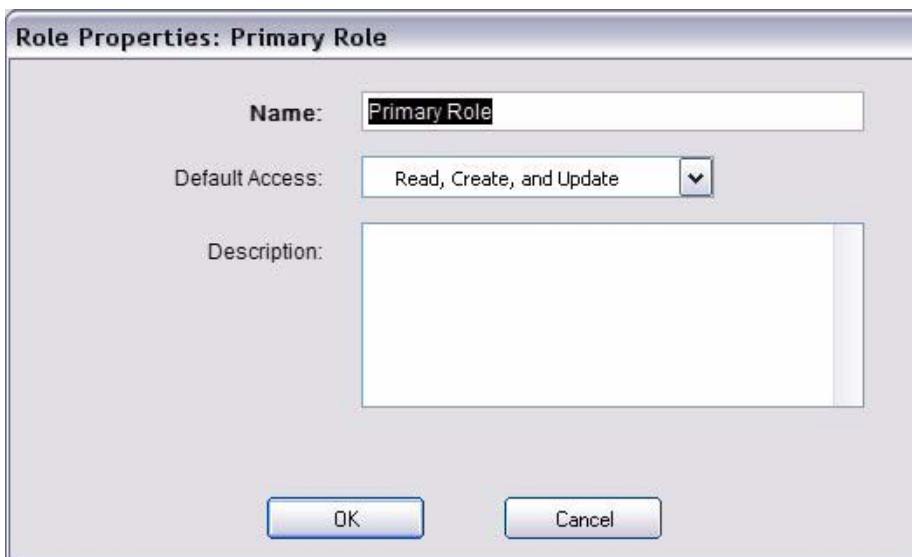
Title:

Type:

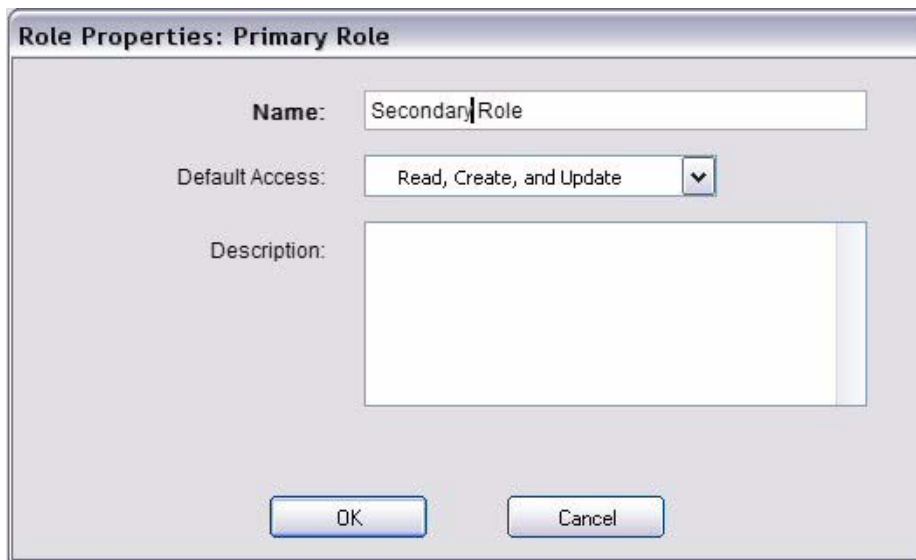
4. Click **Edit Roles**. The **Edit Roles** dialog box is displayed.



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**.



The dialog box is titled "Role Properties: Primary Role". It contains three fields: "Name:" with a text box containing "SecondaryRole", "Default Access:" with a dropdown menu showing "Read, Create, and Update", and "Description:" with a large empty text area. At the bottom are "OK" and "Cancel" buttons.

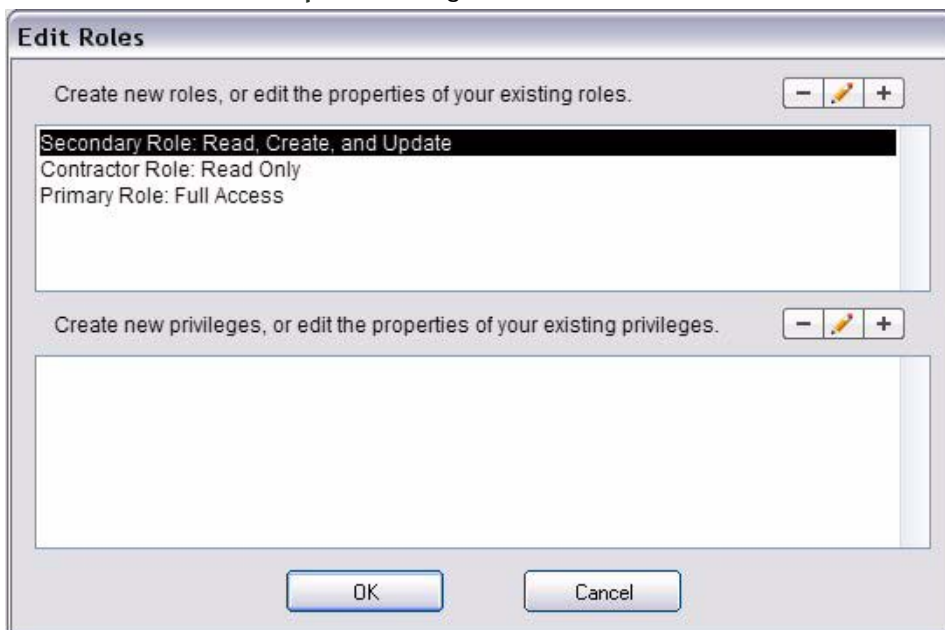
You have successfully edited the properties of the existing custom role.

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;

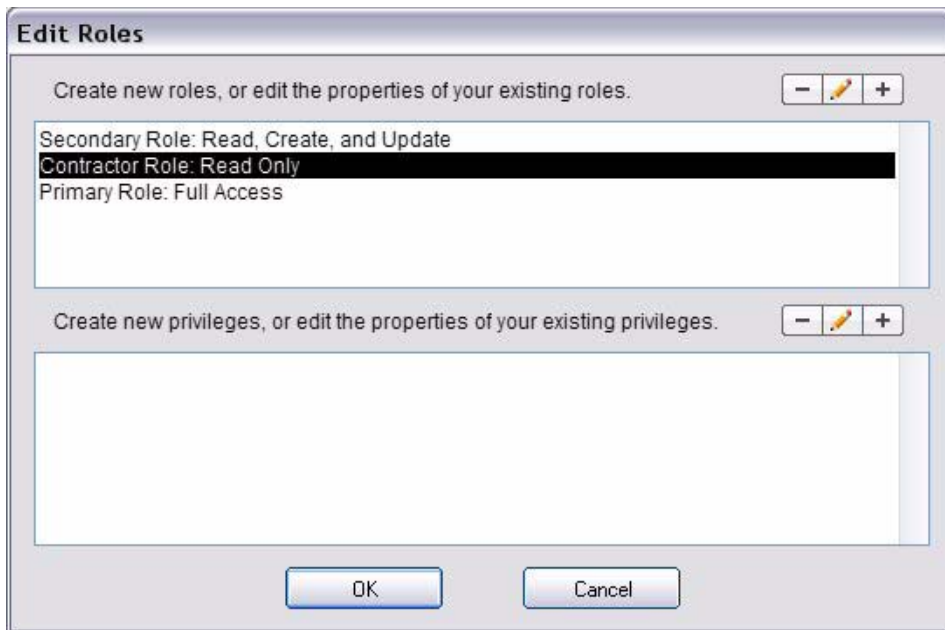
1. Open the **Edit Roles** dialog box.

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.

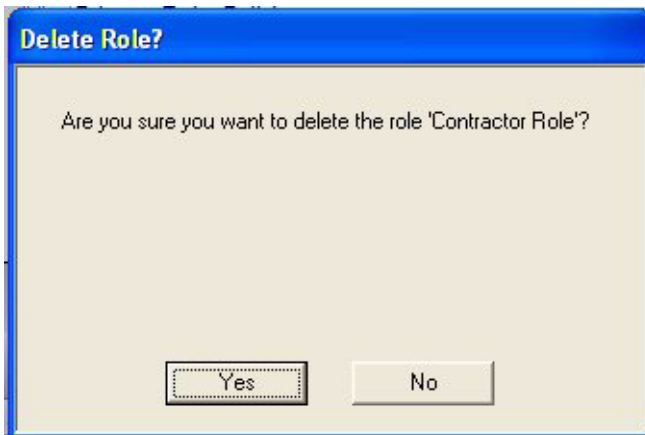


The dialog box is titled "Edit Roles". It has two main sections. The first section is titled "Create new roles, or edit the properties of your existing roles." and contains a list box with three items: "Secondary Role: Read, Create, and Update" (highlighted), "Contractor Role: Read Only", and "Primary Role: Full Access". To the right of this list box are minus, edit (pencil), and plus icons. The second section is titled "Create new privileges, or edit the properties of your existing privileges." and contains an empty list box. To the right of this list box are minus, edit (pencil), and plus icons. At the bottom are "OK" and "Cancel" buttons.

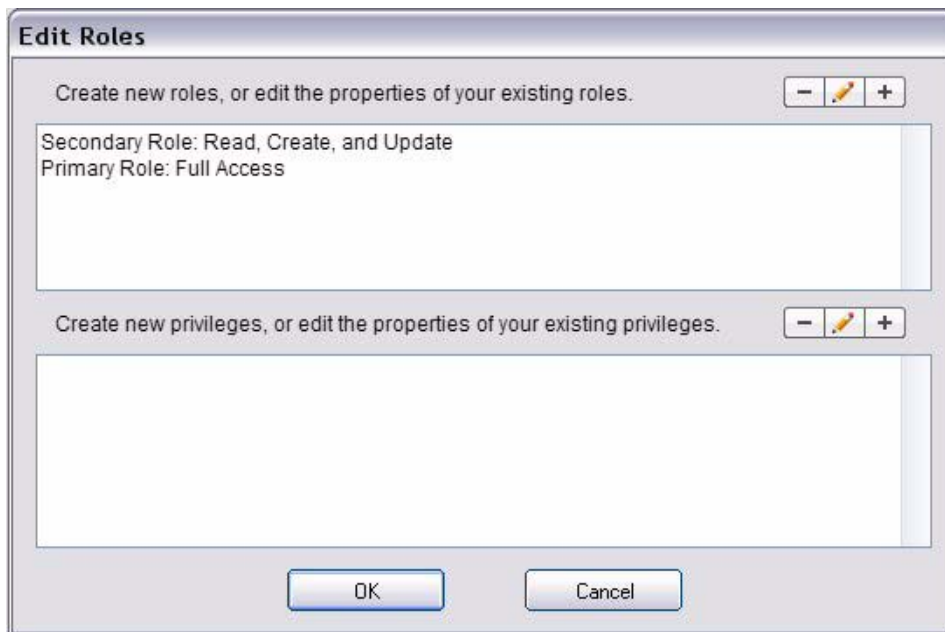
2. Select the **User Role** you want to delete from the list and click the **Minus (-)** icon.



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



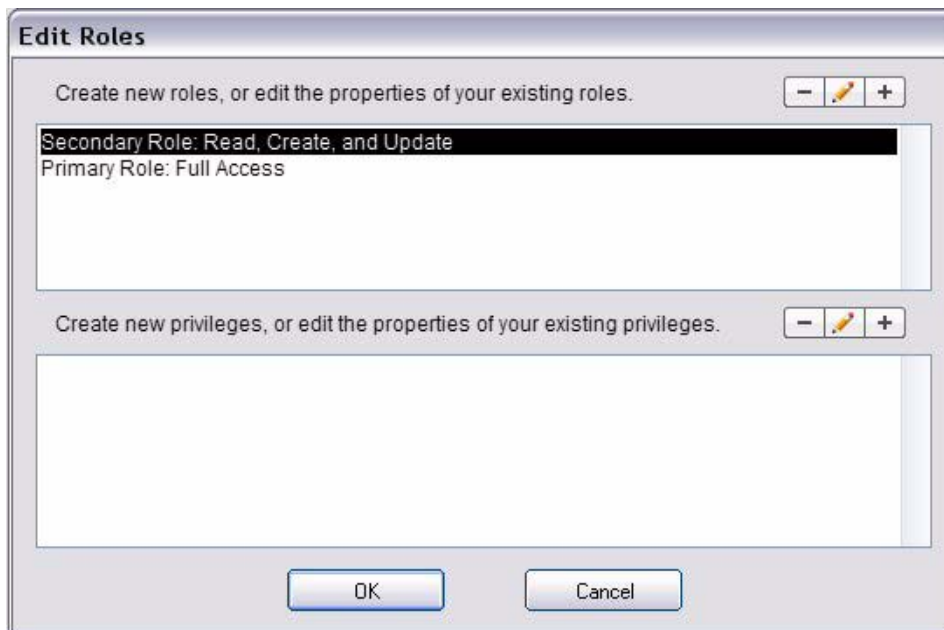
The custom role is deleted from the **Edit Roles** dialog box.



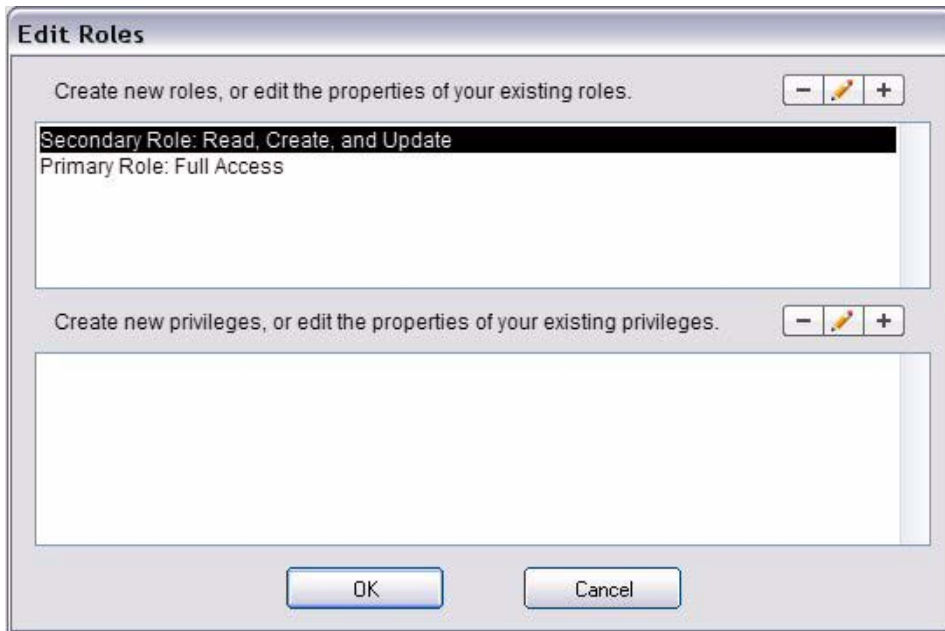
How to Create New Privileges

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.



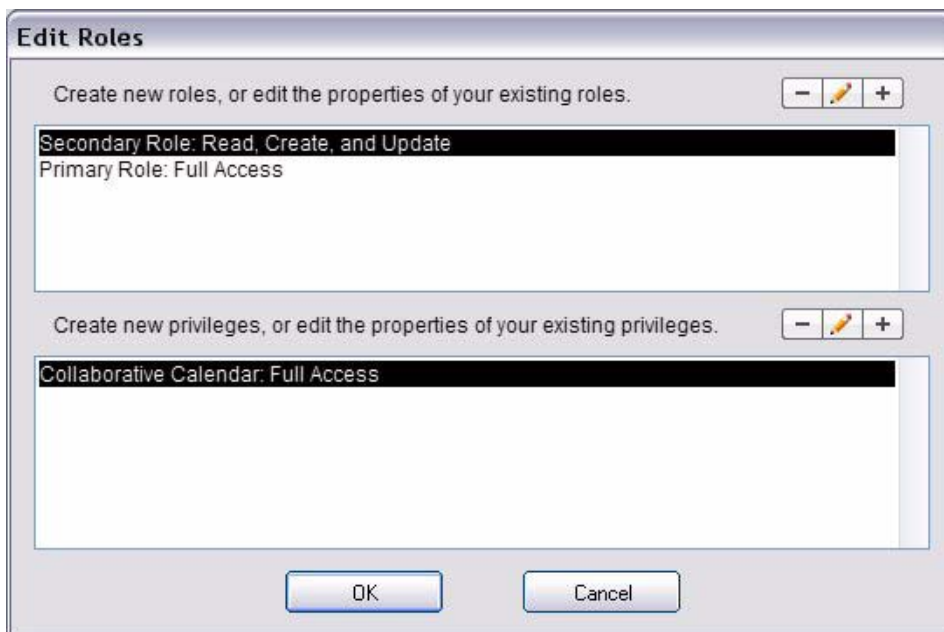
The **Create Privilege** dialog box is displayed.

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.

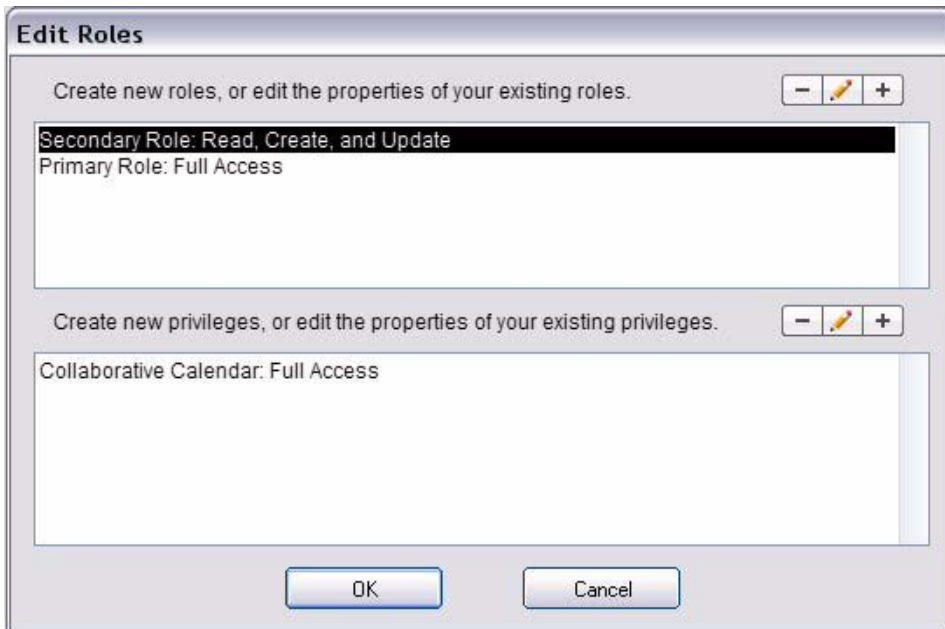
6. Click **OK** to close this dialog box.

How to Edit Existing Custom Privileges

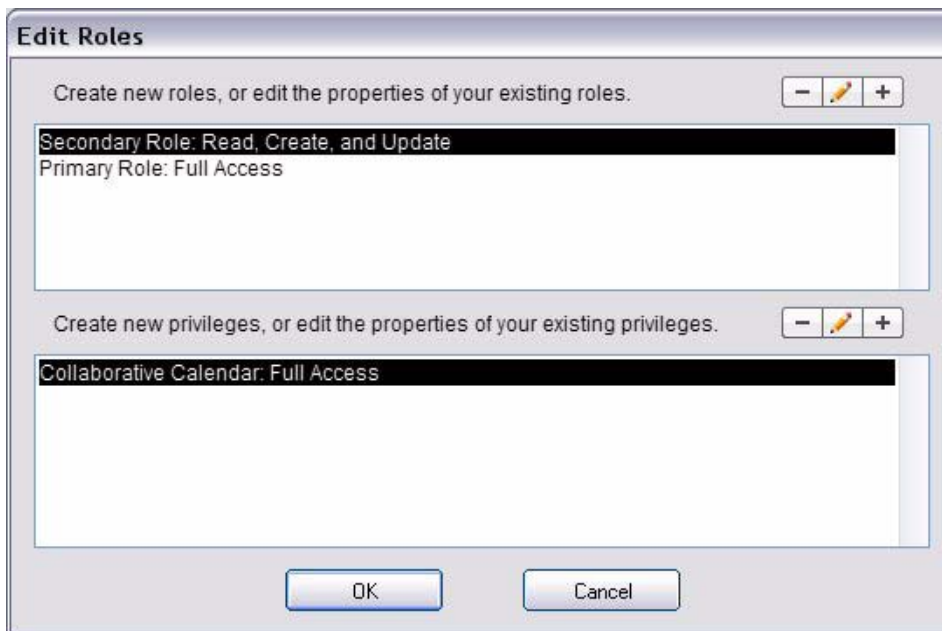
You can edit the privileges of any existing custom role. To edit existing privileges, follow these steps;

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

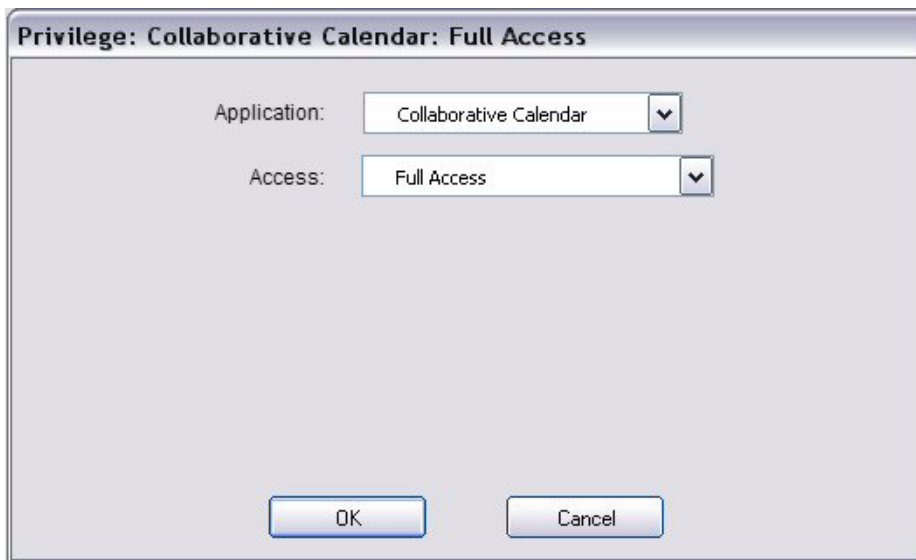
Note: To open the **Edit Roles** dialog box, select a user from the **User** list and click the **Pencil** icon. Then click **Edit Roles** on the **User Properties** dialog box.



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.

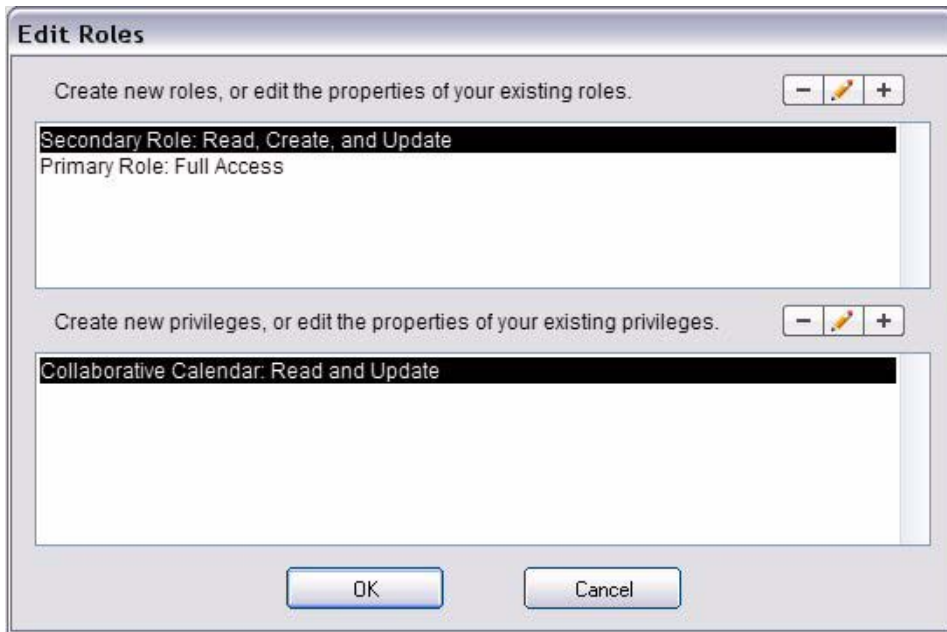


The properties for the privilege you selected are displayed on this dialog box.

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.



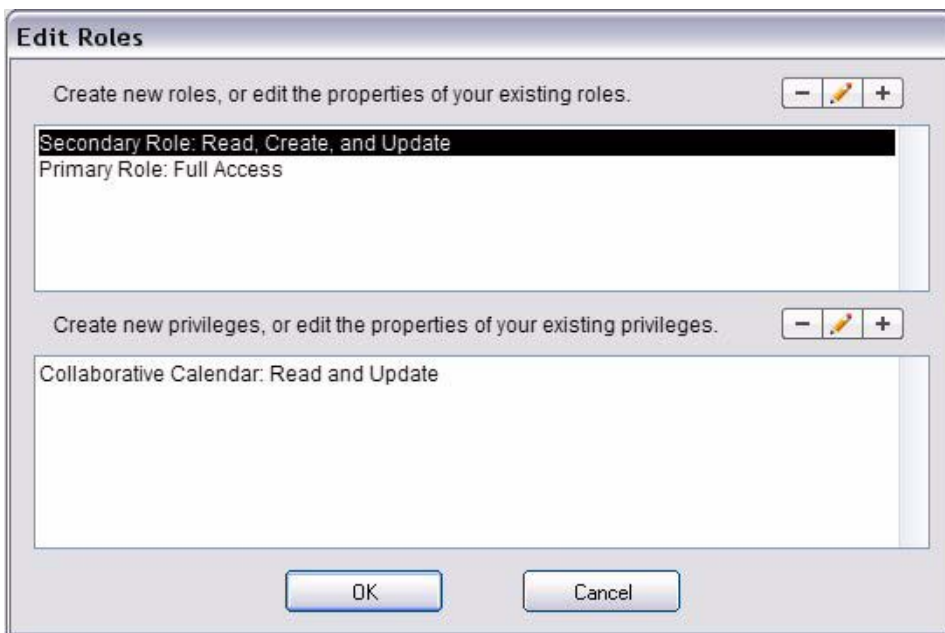
5. Click **OK** to save the changes you made. The changes are displayed on the **Edit Roles** dialog box.



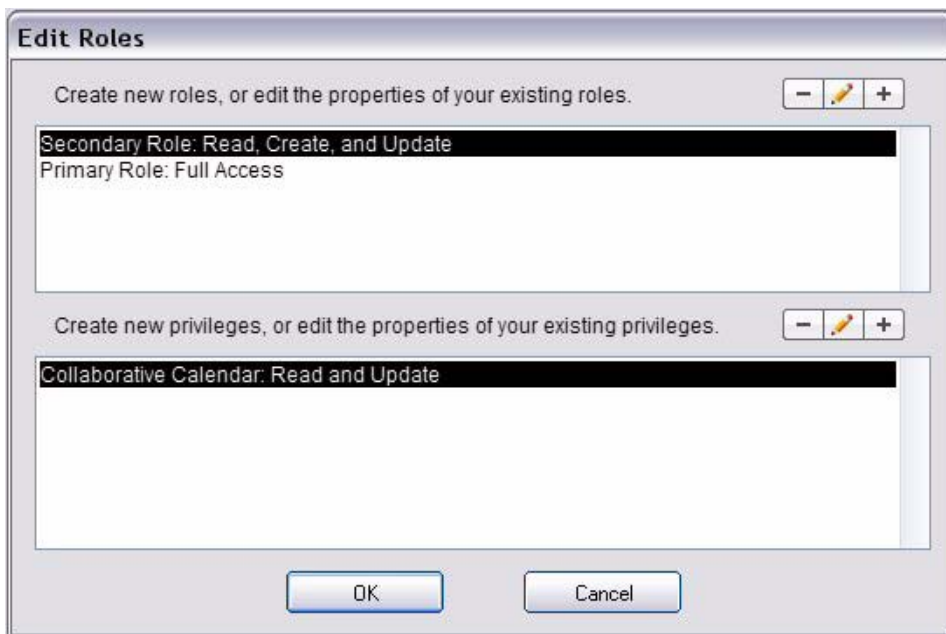
How to Delete Privileges

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](#).

Create A New Org

Click the button at right to create a new Organization. Each Organization is a secure online place for your data, files, and projects. An organization can have any number of users.

+ Create Org



Calendar

◀
May 2008
▶

🕒 Events

✂ To Dos

💬

May 2008							Events	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Name	Date
				1	2	3		
4	5	6	7	8	9	10		
11	12	13	14	15	16	17		
18	19	20	21	22	23	24		
25	26	27	28	29	30	31		

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**.

Ken Neff	4/29/2008	kenneff@dreamfactory	Some Group	Administrator
Kevin McClellan	5/14/2008	kevin@dreamfactory.cc	Admins	Administrator
Lee Hicks	4/28/2008	leehicks@dreamfactor	Members	Administrator
Ciara Hanna	5/20/2008	ciarahanna@dreamfac	Newbies	Full Access

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

New Event

Assigned to: Bill Appleton ☐ Multiple Users

Subject:

Location:

Date: 5/20/2008 [5/20/2008]

Time: ☒ All Day [2:26 PM]

Duration: 1 Hours 0 Minutes

Show time as: Busy

Comments:

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

New Event

Assigned to: Bill Appleton ☐ Multiple Users

Subject: Conversation

Location: Main Boardroom

Date: 5/20/2008 [5/20/2008]

Time: ☐ All Day [2:26 PM]

Duration: 3 Hours 0 Minutes

Show time as: Busy

Comments: Meeting with Engineering team

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.

Name	Date	Location	Duration
Ken Neff	4/29/2008	kenneff@dreamfactory	Some Group Admins
Kevin McClellan	5/14/2008	kevin@dreamfactory.cc	Admins
Lee Hicks	4/28/2008	lee_hicks@dreamfactor	Members Admins
Ciara Hanna	5/20/2008	ciarahanna@dreamfac	Newbies Full Ad

[+ Create Org](#)

Events
To Dos
Messages

Events

Thu	Fri	Sat	Name	Date	Location	Duration
			Conversation	5/20/2008	Main Boardroom	180 Min
1	2	3				
8	9	10				
15	16	17				
22	23	24				
29	30	31				

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**.

Name	Date	Email	Group
Ken Neff	4/29/2008	kenneff@dreamfactory	Some Group
Kevin McClellan	5/14/2008	kevin@dreamfactory.cc	Admins
Lee Hicks	4/28/2008	leehicks@dreamfactor	Members
Ciara Hanna	5/20/2008	ciarahanna@dreamfac	Newbies

[+ Create Org](#)

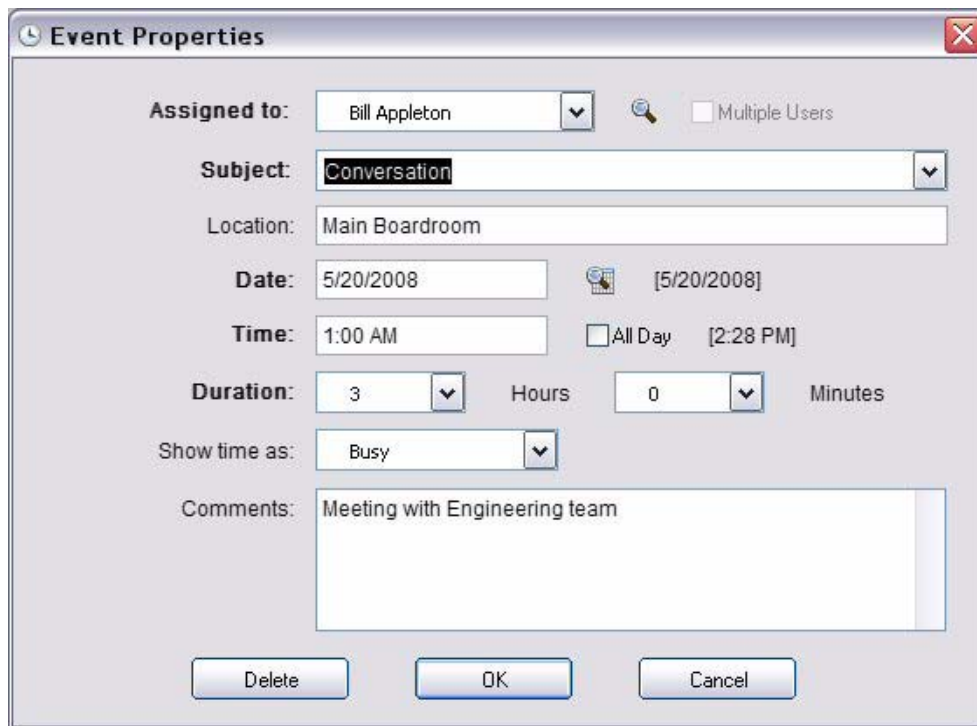
[Events](#) |
 [To Dos](#) |
 [Messages](#)

May 2008 ▶

Events

Wed	Thu	Fri	Sat	Name	Date	Location
				Conversation	5/20/2008	Main Boardroom
	1	2	3			
7	8	9	10			
14	15	16	17			
21	22	23	24			
28	29	30	31			

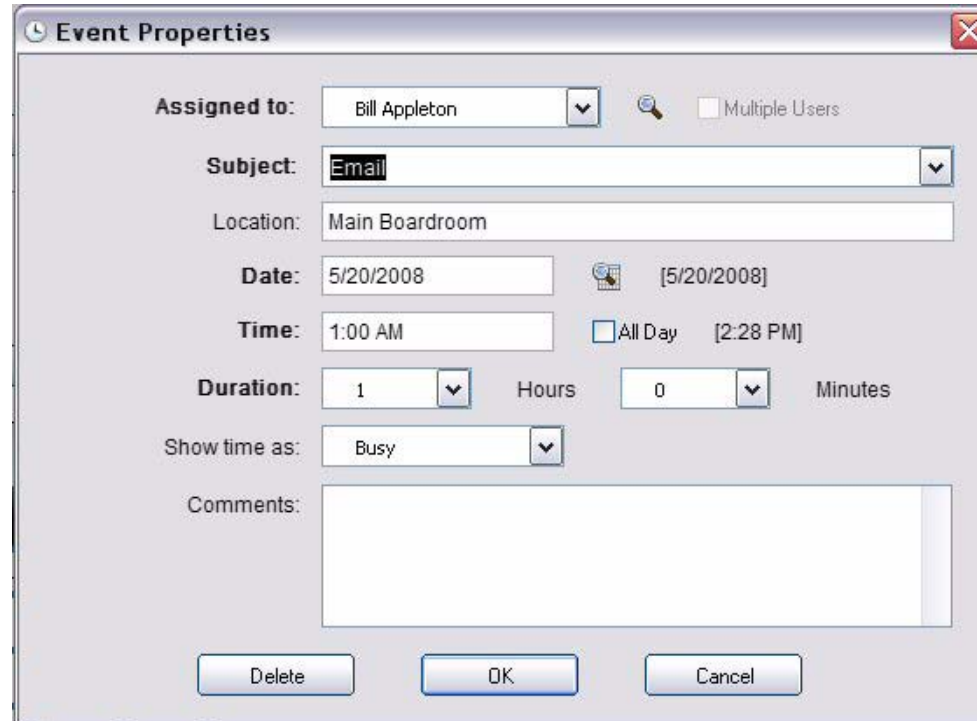
2. Click the **Pencil** icon on the right hand side of the screen. The **Event Properties** dialog box is displayed.



The **Event Properties** dialog box is shown. It contains the following fields and controls:

- Assigned to:** A dropdown menu showing "Bill Appleton" and a magnifying glass icon. A checkbox for "Multiple Users" is to the right.
- Subject:** A dropdown menu showing "Conversation".
- Location:** A text field containing "Main Boardroom".
- Date:** A text field showing "5/20/2008" and a calendar icon. A secondary date "[5/20/2008]" is to the right.
- Time:** A text field showing "1:00 AM". A checkbox for "All Day" is to the right, followed by "[2:28 PM]".
- Duration:** Two dropdown menus. The first shows "3" and is labeled "Hours". The second shows "0" and is labeled "Minutes".
- Show time as:** A dropdown menu showing "Busy".
- Comments:** A text area containing "Meeting with Engineering team".
- At the bottom are three buttons: "Delete", "OK", and "Cancel".

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



The **Event Properties** dialog box is shown again, but with the **Subject** field changed to "Email". All other fields and controls remain the same as in the previous image.

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

The screenshot shows the 'Create Org' button on the left and the 'Events' list on the right. The 'Events' list has a table with columns: Name, Date, Email, and Location. The event 'Email' is highlighted in yellow.

Name	Date	Email	Location
Ken Neff	4/29/2008	kenneff@dreamfactory	Some Group
Kevin McClellan	5/14/2008	kevin@dreamfactory.cc	Admins
Lee Hicks	4/28/2008	leehicks@dreamfactor	Members
Ciara Hanna	5/20/2008	ciarahanna@dreamfac	Newbies

The 'Events' list also includes a calendar view for May 2008 on the left, showing dates 1 through 31.

How to Delete an Event

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

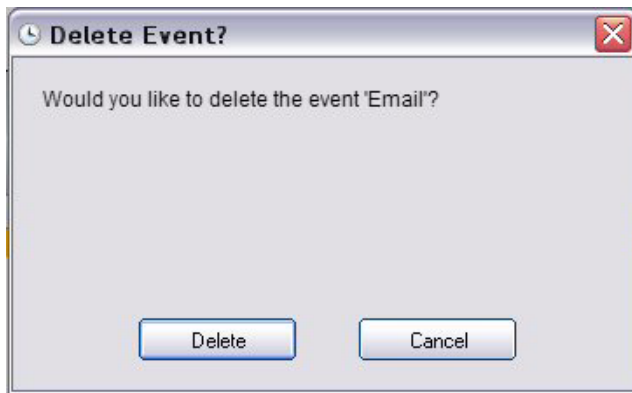
1. Select the **Event** you want to delete from the **Events** list.

The screenshot shows the 'Invite User' button on the left and the 'Users' list on the right. The 'Users' list has a table with columns: Name, Joined, Email, and Group. The user 'Bill Appleton' is highlighted in yellow.

Name	Joined	Email	Group
Anthony Lin	5/13/2008	anthony@dreamfactory	Admins
Ben Busse	4/28/2008	benbusse@dreamfact	Members
Bill Appleton	4/28/2008	billapleton@drean	Admins
Ken Neff	4/29/2008	kenneff@dreamfactory	Some Group
Kevin McClellan	5/14/2008	kevin@dreamfactory.cc	Admins
Lee Hicks	4/28/2008	leehicks@dreamfactor	Members
Ciara Hanna	5/20/2008	ciarahanna@dreamfac	Newbies

The 'Users' list also includes a calendar view for May 2008 on the left, showing dates 1 through 10.

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



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

User

+ Invite User

Org

+ Create Org

Orgs Users Personal Info

Users: DreamFactory Software

Name	Joined	Email	Group
Anthony Lin	5/13/2008	anthony@dreamfactory	Admins
Ben Busse	4/28/2008	benbusse@dreamfact	Members
Bill Appleton	4/28/2008	billapleton@drean	Admins
Ken Neff	4/29/2008	kenneff@dreamfactory	Some Group
Kevin McClellan	5/14/2008	kevin@dreamfactory.cc	Admins
Lee Hicks	4/28/2008	leehicks@dreamfactor	Members
Ciara Hanna	5/20/2008	ciarahanna@dreamfac	Newbies

Events To Dos Messages

May 2008

Wed	Thu	Fri	Sat
	1	2	3
7	8	9	10
14	15	16	17
21	22	23	24
28	29	30	31

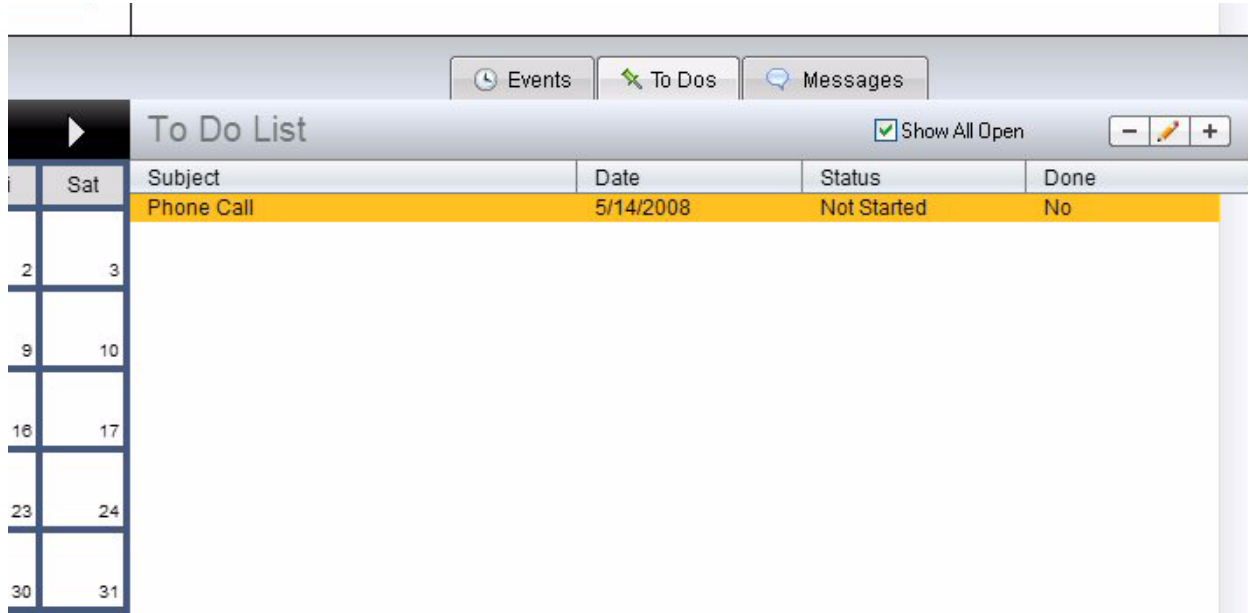
Events

Name	Date	Location
------	------	----------

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.

New To Do

Assigned to: Bill Appleton

Subject:

Due date: 5/15/2008 [5/19/2008]

Priority: Normal

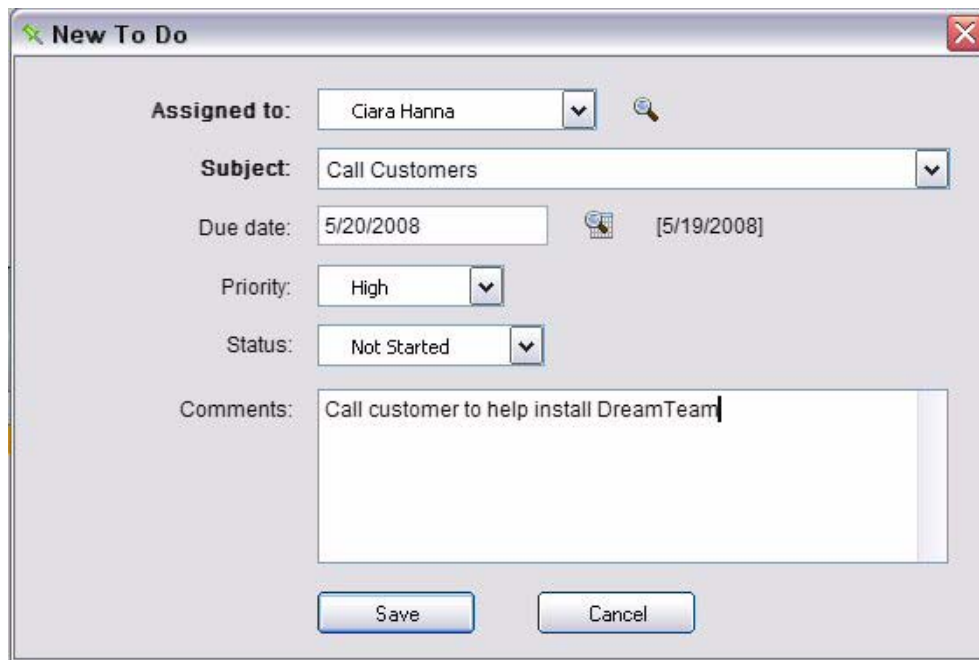
Status: Not Started

Comments:

Save Cancel

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.



New To Do

Assigned to: Ciara Hanna

Subject: Call Customers

Due date: 5/20/2008 [5/19/2008]

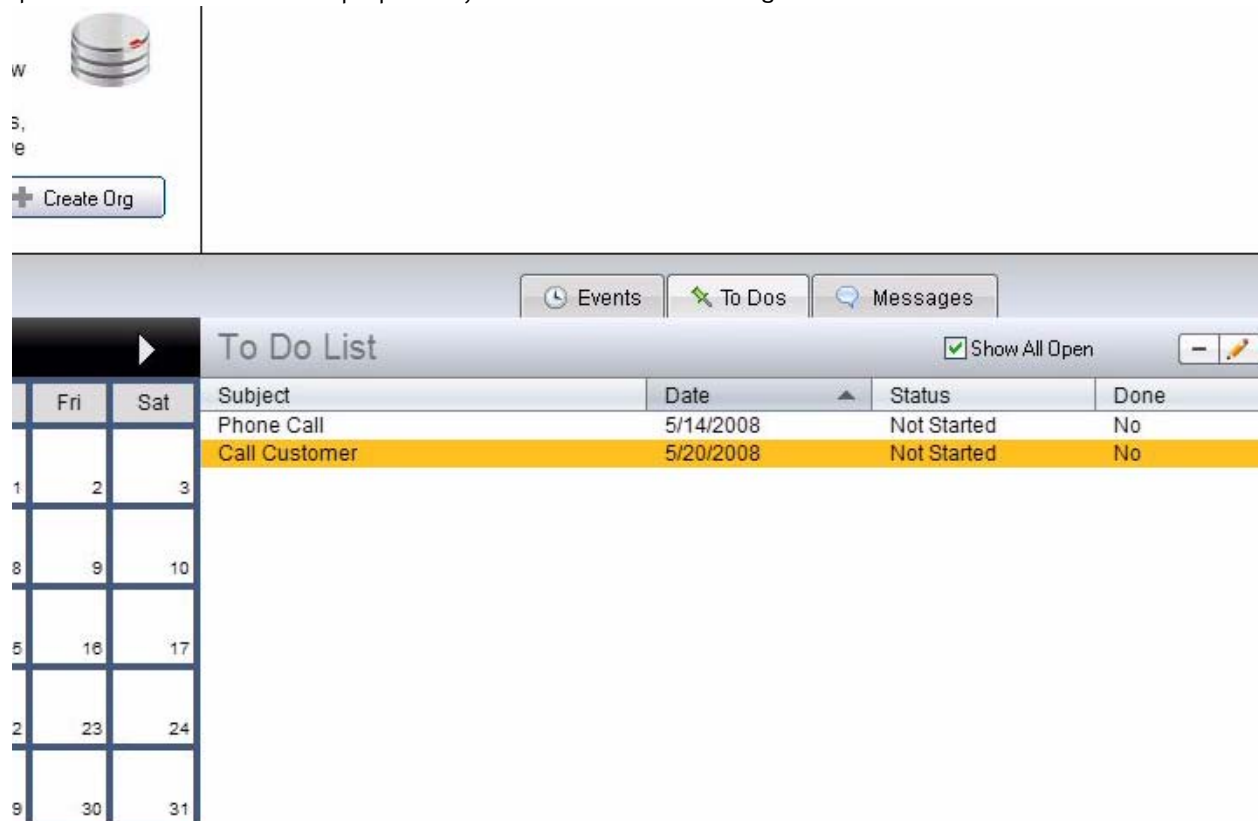
Priority: High

Status: Not Started

Comments: Call customer to help install DreamTeam

Save Cancel

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



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+ Create Org

Events To Dos Messages

To Do List ☒ Show All Open

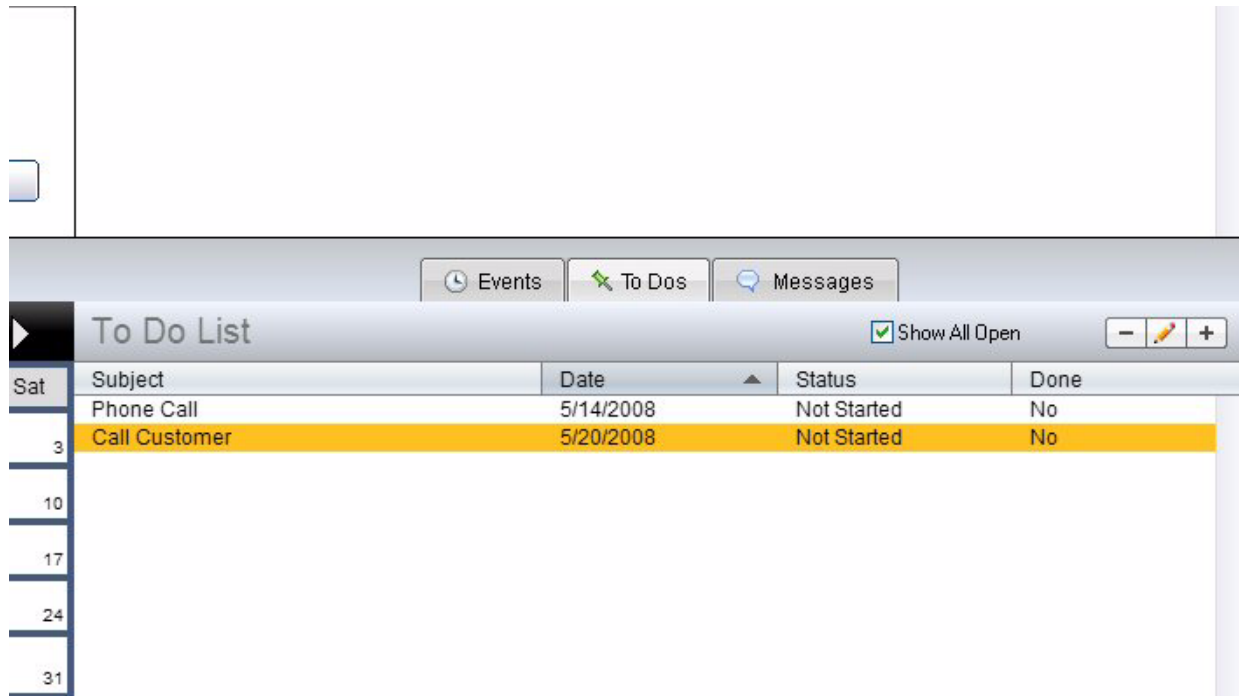
	Fri	Sat	Subject	Date	Status	Done
			Phone Call	5/14/2008	Not Started	No
			Call Customer	5/20/2008	Not Started	No
1	2	3				
8	9	10				
5	16	17				
2	23	24				
9	30	31				

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.

The 'To Do Properties' dialog box contains the following fields:

- Assigned to:** Bill Appleton (dropdown menu)
- Subject:** Call Customer (dropdown menu)
- Due date:** 5/20/2008 (calendar icon)
- Priority:** Normal (dropdown menu)
- Status:** Not Started (dropdown menu)
- Comments:** Call customer about DreamTeam insall (text area)

Buttons at the bottom: Delete, OK, Cancel.

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**.

To Do Properties

Assigned to: Bill Appleton

Subject: Visit Customer Onsite

Due date: 5/20/2008 [5/20/2008]

Priority: Normal

Status: Not Started

Comments: Visit customer to advise on DreamTeam instal

Delete OK Cancel

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**.

Amazon Org

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Events To Dos Messages

May 2008

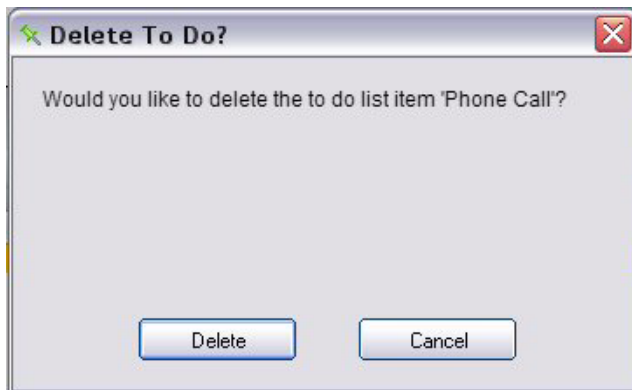
To Do List

Show All Op

Subject	Date	Status
Phone Call	5/14/2008	Not Started

Name	Date	Email	Group
Ken Neff	4/29/2008	kenneff@dreamfactory	Some Group
Kevin McClellan	5/14/2008	kevin@dreamfactory.cc	Admins
Lee Hicks	4/28/2008	leehicks@dreamfactor	Members
Ciara Hanna	5/20/2008	ciarahanna@dreamfac	Newbies

- 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**.



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

Full Name	Member Since	Email Address	Role
Ken Neff	4/29/2008	kenneff@dreamfactory	Some Group
Kevin McClellan	5/14/2008	kevin@dreamfactory.cc	Admins
Lee Hicks	4/28/2008	leehicks@dreamfactor	Members
Ciara Hanna	5/20/2008	ciarahanna@dreamfac	Newbies

May 2008

Wed	Thu	Fri	Sat
	1	2	3
7	8	9	10
14	15	16	17
21	22	23	24
28	29	30	31

Events

✖

To Dos

💬

Messages

To Do List

☒ Show All Op

Subject	Date	Status

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;

- Select the **Message** tab on the **Home Page**.
- Click the **Plus (+)** icon on the right hand side of the screen. The **New Messages** dialog box is displayed.
- Enter all the information for your new message in the appropriate fields.

Home Page Use Cases - 47

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

How 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.