



FootholdConnect

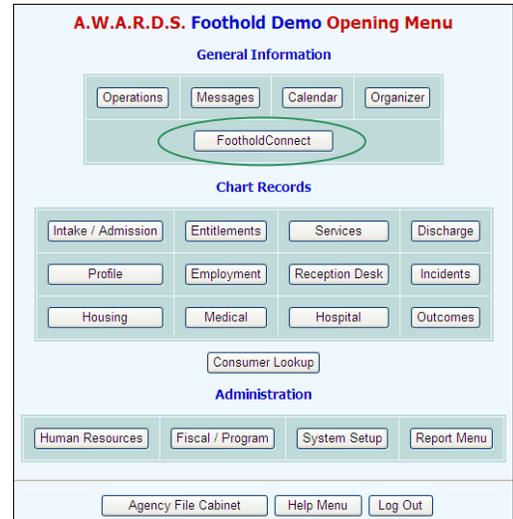
AWARDS INSTRUCTION SHEET

The AWARDS FootholdConnect module, located in the General Information portion of the AWARDS Opening Menu page, enables users with the proper authority to post agency announcements.

Once posted, users with access to the FootholdConnect module can view those agency announcements, as well as any announcements posted by Foothold Technology (for example, those regarding new feature deployments).

The FootholdConnect module is available to all AWARDS users with employee logins. It is visible on the AWARDS Opening Menu page when there is at least one active announcement, and/or when you have the authority to post/edit announcements. Permissions required to post/edit announcements are as follows:

- **DATA ENTRY/ACCESS** – You must have the “Announcement Upload/Edit” data entry/access permission. (In multi-agency databases this permission can only be assigned by, and to, continuum staff.)



ABOUT THIS DOCUMENT

This document is intended to guide you through the process of using the FootholdConnect feature to work with and view announcements. Specific topics covered are:

- **Posting an Announcement** – Post an announcement from start to finish. Page 1
- **Viewing an Announcement** – Open announcements posted by Foothold or agency/continuum staff. Page 4
- **Editing an Announcement** – Change the settings of an announcement, its content, or attachments. Page 5
- **Deleting or Disabling an Announcement** – Remove an out of date or unneeded announcement. Page 6
- **Frequently Asked Questions** – Learn the answers to common announcement questions. Page 7

POSTING AN ANNOUNCEMENT

To post an agency announcement, complete the following steps:

1. From the AWARDS Opening Menu page, click **FootholdConnect**. The FootholdConnect pop-up menu is displayed. →

This pop-up contains an option to add/edit announcements, and beneath that a list of any active posted announcements.



For more information on viewing posted announcements listed in this menu, see “Viewing an Announcement” on page 4.

- Click **Add/Edit Announcement**. The *Announcements* index page is displayed. 

This page contains a list of any existing agency announcements, as well as the option to add a new one.



- At this time, do one of the following:

- **To clone (copy) an existing announcement in order to re-use its content** – Click the clone icon next to the announcement to be cloned.

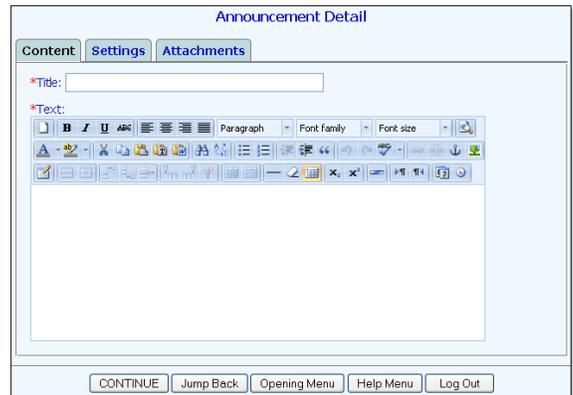
Cloning can be helpful if you have re-occurring posts, or if you want different versions of the same basic announcement so that it can be directed toward different user groups.

- **To create an announcement from scratch** – Click **Add New Announcement**.

The *Announcement Detail* page is displayed. 

By default the first of the three announcement detail tabs, “Content,” is open on this page. It is used to identify the announcement and enter its content.

When cloning an existing announcement each tab's content will default to what was entered for that announcement. Replace or make changes to that content for the new announcement as necessary.



- In the **Title** field, type a name for the announcement. Keep in mind that the title entered here is how the announcement will be identified to all users on the *FootholdConnect* pop-up menu.
- In the **Text** box, enter the content of your announcement. Above the text box are formatting options that can be used to adjust the appearance of your text as needed.

For a brief description of what each formatting option does, hover your mouse over its icon in AWARDS.

- Click the **Settings** tab. The announcement setting options are displayed. 

- Indicate the status of the announcement by clicking one of the following radio buttons:

- **Active** – When selected the announcement is available for viewing as of the start date entered in step 8, or immediately if no start date is specified.
- **Disabled** – When selected the announcement is NOT available for viewing, regardless of any start or end dates entered in step 8.



The default selection is “Disabled.”

8. In the **Start Date** field, type the date on which the announcement should first be available for viewing (using mm/dd/yyyy format). If a start date is not specified, the announcement will be available as soon as the status has been set to "Active."
9. In the **End Date** field, type the date on which the announcement should no longer be available for viewing (using mm/dd/yyyy format). If an end date is not specified, the announcement will be available until the status has been set to "Disabled."
10. Announcements can be posted for all staff with access to the FootholdConnect feature, or for staff assigned to specific user groups. If this announcement is to be available for all staff, continue with step 12. If the announcement's availability should be limited to staff members assigned to specific user groups, click **Target User Group**. The *Target User Group List* pop-up is displayed. →



The user groups available for selection in this list are those configured for the database using the System Setup module, Permissions Maintenance, Configure User Groups feature. For more information on configuring user groups, please see AWARDS Online Help.

11. Click the check box next to each user group for which the announcement should be available, and then click **Close**. If no user groups are selected, the announcement will be available to all user groups by default.
12. Each announcement can have up to four attachments. To attach one or more files to this announcement, click the **Attachments** tab. The *Announcement Details* attachment selection page is displayed. →



To skip the process of attaching files to this announcement, continue with step 17.

13. In first the **Display Name** field, type a name for the attachment. The name entered here will be displayed as a link on the announcement.
14. Click the corresponding **Browse...** button. The *File Upload* dialog box is displayed.
15. Select the file to be attached to the announcement, and then click **Open**.

The total size of all files attached to the announcement cannot exceed 2MB. The total number of all files attached cannot exceed four. Accepted file types are .DOC, .XLS, .PDF, .JPG, and .BMP.

16. Repeat steps 13 through 15 as needed or until the four attachment limit is reached.

17. Click **CONTINUE**. The announcement is saved and the updated *Announcements* index page is displayed with your new announcement included in the list. →



Additionally, if you indicated in step 7 that the announcement should be active immediately, it is added to the *FootholdConnect* pop-up menu at this time. Otherwise, it will become active as of the specified start date, or when the status is manually changed from "Disabled" to "Active."

To preview your announcement now or at any time in the future, click the magnifying glass icon for that announcement in the index.



- By default, active announcements are alphabetized on both the *Announcements* index page, and on the *FootholdConnect* pop-up menu accessed from the *AWARDS Opening Menu* page. To change that order, click the re-arrange icon.



This step is optional.

The *Announcement Reordering* page is displayed. This page includes both active and disabled announcements. ▶



- Click the announcement to be moved to highlight it.
- Use the red up and down arrow icons to the right of the announcements list to move the highlighted announcement up or down in the list, or drag and drop the announcement to the desired location.
- Click **CONTINUE**. The new order is saved and the *Announcements* index page is re-displayed with the announcements listed in the order you specified.

The process of posting an announcement is now complete.

VIEWING AN ANNOUNCEMENT

Once posted, announcements can be viewed by any users with access to the *FootholdConnect* module. To view an announcement, complete the following steps:

- From the *AWARDS Opening Menu* page, click **FootholdConnect**. The *FootholdConnect* pop-up menu is displayed. →

Unless you have the "Announcement Upload/Edit" permission, the FootholdConnect module is only included on the AWARDS Opening Menu page when there are active announcements posted for you to view.

Within the *FootholdConnect* pop-up menu announcements are grouped by category as shown here.

Depending on the types of active announcements currently posted, you may see one or more of the following categories on the menu:

- **What's new in AWARDS** – Contains announcements posted by Foothold Technology to alert users about new AWARDS features and functionality.
- **Optional Enhancements** – Contains announcements posted by Foothold Technology to alert users about optional AWARDS enhancements being offered for deployment.



- **Events** – Contains announcements posted by Foothold Technology to alert users about upcoming AWARDS-related events such as Users Groups and Building on the Basics seminars.
- **Tip of the Month** – Contains announcements posted by Foothold Technology to provide users with useful AWARDS tips and tricks.
- **Agency Announcements** – Contains announcements posted by agency/continuum staff with the “Announcement Center Upload/Edit” permission.

If there is no announcement posted in a category, that category is not included on the menu.

2. Click the name of the announcement you want to view. The *FootholdConnect* pop-up menu is closed and in its place a pop-up containing the selected announcement is displayed.



If an announcement has an attachment, click the name of that attachment to open it.

3. When you have finished viewing the announcement, click **Close**. The announcement is closed and the *FootholdConnect* pop-up menu is re-displayed.
4. Click **Close** to return to the *AWARDS Opening Menu* page.

The process of viewing an announcement is now complete.

EDITING AN ANNOUNCEMENT

To make changes to an existing announcement, either active or disabled, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **FootholdConnect**. The *FootholdConnect* pop-up menu is displayed.
2. Click **Add/Edit Announcement**. The *Announcements* index page is displayed.

From the list of existing agency announcements shown on this page, click the name of the announcement to be edited. The *Announcement Detail* page is displayed.



3. Use one or more of the three tabs available on this page to adjust the announcement's content, settings, and/or attachments:
 - **Content tab** – Using the fields and options on this tab, make changes to the announcement's title and/or text as needed.
 - **Settings tab** – Using the fields and options on this tab, adjust the announcement's status, start date, end date, and/or target user groups as needed.

- **Attachments tab** – Using the fields and options on this tab, add or remove attachments for this announcement as needed.

To remove an attachment, click the delete icon next to that attachment. 

4. Click **CONTINUE**. The announcement is saved and the *Announcements* index page is re-displayed. Any changes made to the announcement's title, status, and/or start and end dates are reflected on this page.

The process of editing an announcement is now complete.

DELETING OR DISABLING AN ANNOUNCEMENT

If there is an agency announcement that should no longer be available for viewing on the *FootholdConnect* pop-up menu, you have the option to delete that announcement, or to disable it. Deleting an announcement removes it from AWARDS entirely. Disabling an announcement means that it is not actively available for viewing any longer, but it remains in AWARDS so that it can be worked with in the future as needed, or so that you have a historical record of previously posted announcements.

To delete or disable an existing announcement, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **FootholdConnect**. The *FootholdConnect* pop-up menu is displayed.
2. Click **Add/Edit Announcement**. The *Announcements* index page is displayed.

To delete one of the existing agency announcements listed on this page, continue with step 3. To disable one of these agency announcements, continue with step 5.

3. Click the delete icon next to the announcement to be deleted. 

A confirmation dialog box is displayed.

4. Click **OK**. The announcement is deleted and the updated *Announcements* index page is displayed.



The process of deleting an agency announcement is now complete. The steps listed on the following page are only relevant when disabling an active announcement.

5. Click the name of the announcement to be disabled. The *Announcement Detail* page is displayed.
6. Click the **Settings** tab. The announcement setting options are displayed. 

7. Click the **Disabled** radio button.

Disabling an announcement overrides any start and end date settings that may have been previously specified for that announcement on this page.



8. Click **CONTINUE**. The announcement is disabled and is removed from the *FootholdConnect* pop-up menu. The updated *Announcements* index page is also displayed at this time. The announcement's new status is reflected in the "Status" column on that page.

The process of disabling an active agency announcement is now complete.

To confirm that a disabled announcement is no longer available for viewing, click **FootholdConnect** from the AWARDS Opening Menu page. The announcement will not be listed in any portion of the displayed pop-up menu.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the FootholdConnect feature can be a useful reference when you have your own questions about the functionality.

CAN ANNOUNCEMENTS BE VIEWED BY USERS WITH CONSUMER LOGINS?

No. Presently only those users with employee logins have access to the FootholdConnect module and any posted announcements it contains.

HOW CAN I EDIT SOMETHING OTHER THAN AN "AGENCY ANNOUNCEMENT?"

While you may see up to five announcement categories listed on the *FootholdConnect* pop-up menu at any given time, you will only ever be able to edit announcements in the "Agency Announcements" category. The other four categories are reserved for use by Foothold Technology.

HOW CAN I POST SOMETHING OTHER THAN AN "AGENCY ANNOUNCEMENT?"

While you may see up to five announcement categories listed on the *FootholdConnect* pop-up menu at any given time, you will only ever be able to post announcements to the "Agency Announcements" category. The other four categories are reserved for use by Foothold Technology.

WHY DON'T I SEE "ADD/EDIT ANNOUNCEMENT" ON THE FOOHOLDCONNECT MENU?

The Add/Edit Announcement option is only available for users who have the "Announcement Upload/Edit" permission. Users who do not have that permission can view all posted announcements, but cannot post any themselves.

WHY DON'T I SEE THE FOOHOLDCONNECT BUTTON ANYMORE? I USED TO.

Unless you have the "Announcement Upload/Edit" permission, the FootholdConnect module will only be included on the AWARDS Opening Menu page if there are active announcements posted for you to view.

WHY DON'T I SEE THE SAME "AGENCY ANNOUNCEMENTS" AS MY CO-WORKERS?

Each agency announcement can be targeted to members of specific user groups. As a result, different users may see different announcements based on the user group to which they are assigned.

WHY IS THE “ANNOUNCEMENT UPLOAD/EDIT” PERMIT SOMETIMES GRAYED OUT?

In multi-agency databases the “Announcement Upload/Edit” permission can only be assigned by, and to, continuum staff. As a result, when completing permissions data entry for non-continuum staff, the “Announcement Upload/Edit” permission is grayed out.

WHY ISN'T THE NUMBER OF ANNOUNCEMENT CATEGORIES I SEE CONSISTENT?

An announcement category is only included on the *FootholdConnect* pop-up menu if there is an active announcement of that type. For example, if there are currently no optional enhancements being offered by Foothold Technology, the “Optional Enhancements” category is not shown.