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Workspaces in the Management Portal
Tip Sheet for Community Executives

One of the many advantages to the Management Portal is that it offers options to create customized "workspaces" along with the ability to bookmark pages within the Portal to create a work environment that is unique to you and what you need to do your job efficiently. This Tip Sheet is designed to look at workspaces specifically, but remember there is no right or wrong configuration, and both uniquely created workspaces and bookmarks can be modified at any time.

What is a Workspace?

This new feature unique to the Management Portal allows each individual user to create one or more workspaces, each populated with their chosen selection of **Widgets**, which are a variety of tools and information boxes, to serve up a customizable view of the items they need the most for their work. There is also the concept of **System Workspaces**, which are workspaces we created for users. The **Community Landing** workspace that you see when you initially login is a System Workspace. This workspace cannot be permanently altered, but you can create additional workspaces, and anything you create can be modified whenever you choose.

The **My Workspace**, **Community** and **CiraBooks** nodes support one or more workspaces.

The motivation behind workspaces is that we recognize that the most-frequently accessed information varies for each of us, so this new feature allows you to create a collection of widgets from a drop-down specific to the node that provides you fast and convenient access to the information you find helpful. A fellow board member may have an entirely different collection. If your needs change, you can modify the workspace or create a new one. You can even create a workspace for a temporary project that you can delete when done with it.

As a comparison to the Board / Management Portal ("Classic") where the Community Dashboard provides basic community information in a static "one size fits all" format, here we have empowered you to make some of the most popular pages displayed right up front in a configuration that you prefer.

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System Workspaces

To get you started, we have provided a standard workspace in each of the three nodes listed above. Their configuration cannot be edited or deleted. But each widget can be resized during an individual browsing session to make it larger if you so choose. Click on **Toggle Fullscreen** in the upper right-hand corner of the widget to enlarge the view to, well, the full screen. When you are done, you can click the same location to restore it to its original size.
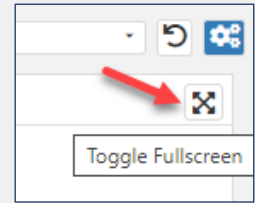

Figure 1: Toggle Fullscreen

If the System Workspaces are not exactly what you are looking for you can and are encouraged to create your own and mark your own creation as your default, which will mean that it will be the primary workspace you see when you login or land on the node. See how to create and manage your own below.
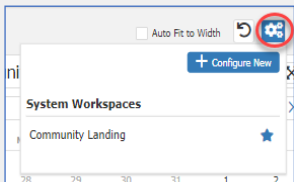
Configuring Workspaces

Figure 2: Configuring a New Workspace

To create a new workspace, click on the gear icon located at the top right-hand of the page and select **Configure New**.

This will allow the user to set a **Workspace Configuration** based on the following parameters:
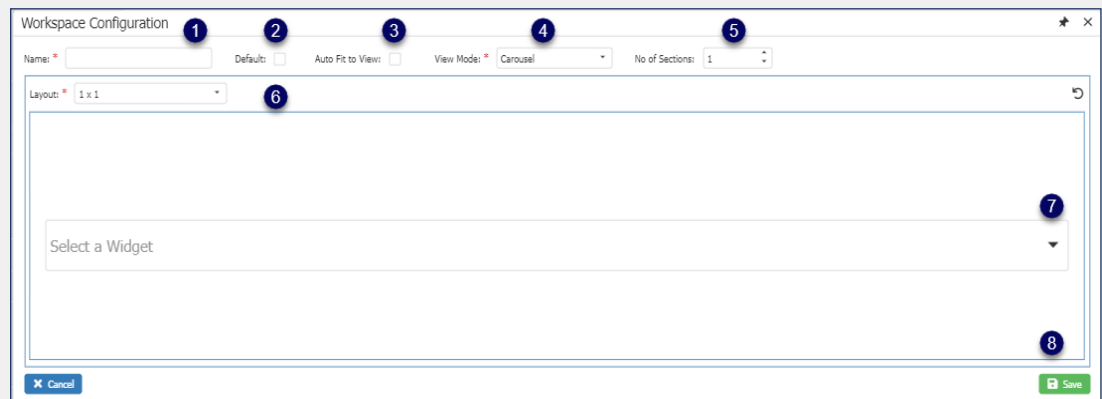

Figure 3: Configuration Options for Workspaces

Items noted with a red asterisk (*****) are required.

1. **Name.** Users can title a workspace anything they choose to help them recall its primary purpose.

2. **Make Default.** If a user configures more than one workspace, they can choose which one the portal will open to by default.

3. **Auto Fit to View.** If checked, the widgets will resize to fit the monitor window size. If not checked, widgets remain at a constant width and may cause some contents not to be visible.

4. **View Mode.** This selection will set how the chosen widgets will show in the workspace.

   a. **Carousel.** Carousel mode creates pages of widgets that users scroll across, much like apps on a smartphone.
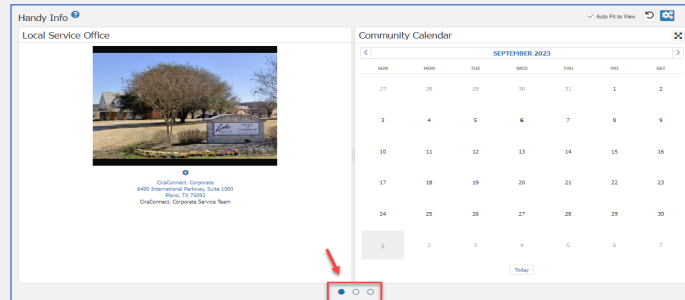

Figure 4: A Carousel Configuration

   b. **Scroll.** Using this option creates a vertically stacked layout that will continue downward allowing the user to scroll down to see all options.
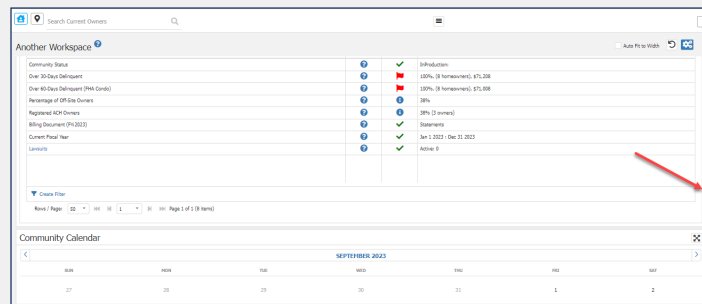

Figure 5: A Scroll Configuration (Use the scroll bar to access all widgets)

5. **No. of Sections.** Users can define how many pages are available in Carousel mode; or blocks of widgets in the case of Scroll mode.

6. **No. of Columns.** Users can select a layout based on the view they selected:

   a. **Carousel.** This allows the user to set the columns per section and the lines per column (up to two).

   b. **Scroll.** If in Scroll mode, this allows the user to select the number of columns in each section, up to four.

7. **Select a Widget.** The widgets differ by the Workspace area, but most will likely be familiar to veteran users of the Classic Portal. They all lead to information within the portal that is updated in real time as edits or additions or made. For example, if you select Calendar, the information from the widget will mirror the page view.

8. **Save.** To complete the configuration, click Save.

Modifying Existing Workspaces

Once a workspace is configured, it can be edited or deleted at any time by re-clicking on the gear icon and managing it as follows:
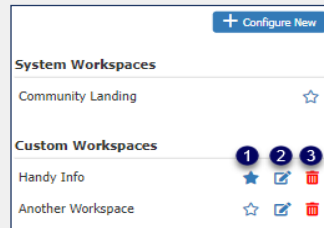

Figure 6: Editing a Workspace

1. In the illustration above, the user has two workspaces in addition to the Community Landing System Workspace. The filled-in star to the right of the top title denotes that it is the user's default workspace. They can flip the default to their other workspace by clicking on the white star, which will cause that workspace to move to the primary position.

2. Clicking here will allow a user to edit the workspace.

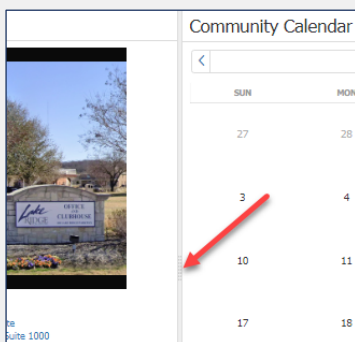3. Or they can delete it altogether.

When you are working in the workspace, you can enlarge individual widgets in the same manner described above in the System Workspace section. Additionally, you can resize the widgets by using the spacer bar between each one. Using your mouse pointer, grab the bar and reposition it to resize the widgets. The system will remember that setting moving forward.

Figure 7: Resizing the Spacer Bar

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