



**County of Simcoe**  
**Social and Community Services**  
Children & Community Services  
Department  
1110 Highway 26,  
Midhurst, Ontario L9X 1N6  
Main Line (705) 722-3132  
Beeton Area (905) 729-4514  
Fax (705) 725-9539  
[simcoe.ca](http://simcoe.ca)

**Comté de Simcoe**  
**Services sociaux**  
**et communautaires**  
Services à l'enfance  
et à la communauté  
1110, autoroute 26,  
Midhurst, Ontario L9X 1N6  
Ligne principale (705) 722-3132  
Région de Beeton: (905) 729-4514  
Télécopieur: (705) 725-9539



County of Simcoe

# Extranet User Guide

Simcoe County Data Consortium

Simcoe County Data Consortium  
11-12-2020

# Contents

- Access .....2
- Log In .....2
- Definition and Content Management .....3
  - Homepage .....3
  - Resources .....3
    - To upload a file .....4
    - To create a folder.....5
- Photos .....6
  - To upload a file .....6
- Discussion Board .....7
  - To create a new discussion .....7
  - To reply to an existing discussion .....7
- Useful Websites .....7
- Calendar .....9
- Manage Users .....11
  - To add a new user .....11
- Managing Alerts .....12
- Contacts .....12

## Access

Member: A member is someone who can read, write and update files. A member can also add new "visitor" users.

Visitor: A visitor is someone who can read all files and contribute to the discussions.

Site Owner: The County of Simcoe is the site owner

## Log In

To Login to the site:

1. Go to: <https://partner.simcoe.ca/sites/cdp/>
2. Enter your Login and Password
3. If this is your first time login in, select "External Partner Sign In":

## Sign In

The diagram illustrates the sign-in process. On the left, under the heading "County Employee Sign In", is the County of Simcoe logo with the text "Employee Sign In" below it. A red arrow points from this logo to the right. On the right, under the heading "External Partner Sign In", is a sign-in form. The form includes a "User name:" field, a "Password:" field, a checkbox for "Sign me in automatically", a "Forgot Password?" link, and a "Sign In" button.

By logging in, you agree to the [Terms and Conditions](#).

4. If you experience any issues please reach out to Victoria Chapman at: [victoria.chapman@simcoe.ca](mailto:victoria.chapman@simcoe.ca)

# Definition and Content Management

## Homepage

The Homepage will allow you to see a snapshot of the content recently added, and featured resources. You will be able to access the site content by clicking on Resources, Photos, Discussion Board, Useful Websites, and Calendar on the top left hand side of this page.



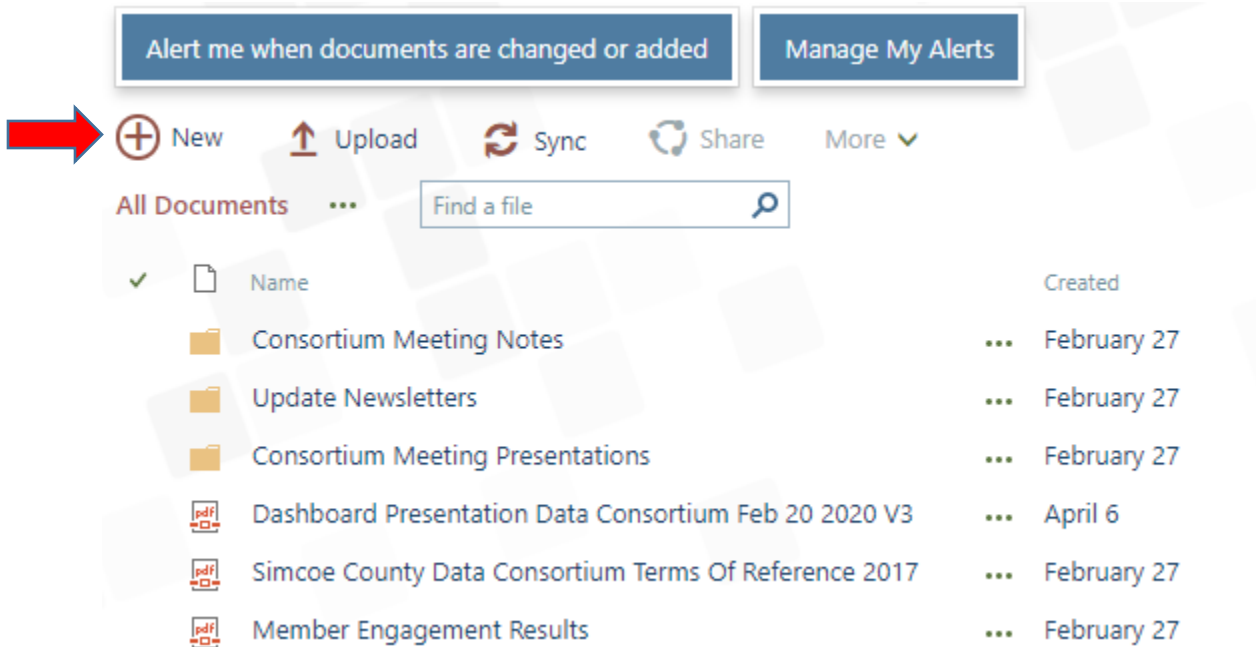
## Resources

This section is a repository of resources meant to be shared with all of the Simcoe County Data Consortium members and users.

**Note:** Depending on your permissions, you may be able to upload a file, but before any file is shared with the community, it will require approval by the site owner

## To upload a file

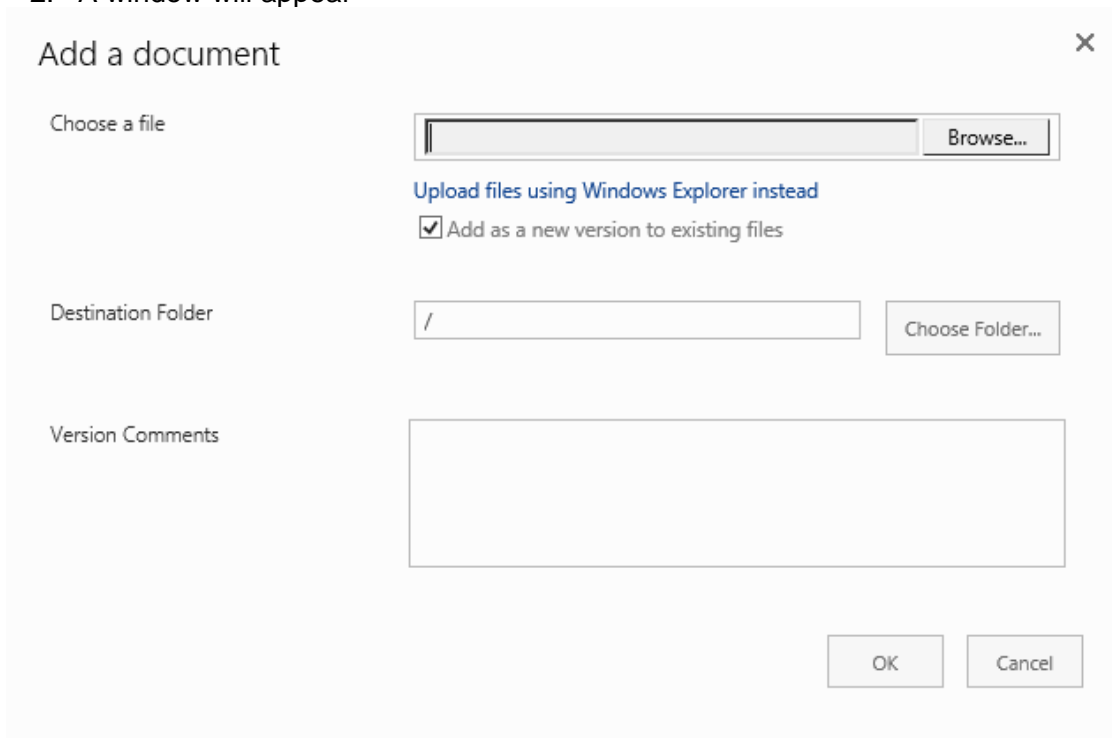
1. Go to "+New" upload the file



The screenshot shows a document management interface. At the top, there are two buttons: "Alert me when documents are changed or added" and "Manage My Alerts". Below these, a navigation bar contains icons for "New", "Upload", "Sync", "Share", and "More". A red arrow points to the "New" icon. Below the navigation bar, there is a search bar labeled "Find a file" and a list of documents. The list has columns for "Name" and "Created".

✓	Name	Created
	Consortium Meeting Notes	February 27
	Update Newsletters	February 27
	Consortium Meeting Presentations	February 27
	Dashboard Presentation Data Consortium Feb 20 2020 V3	April 6
	Simcoe County Data Consortium Terms Of Reference 2017	February 27
	Member Engagement Results	February 27

2. A window will appear



The screenshot shows a dialog box titled "Add a document" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Choose a file:** A text input field with a "Browse..." button to its right.
- Upload files using Windows Explorer instead:** A section with a checked checkbox labeled "Add as a new version to existing files".
- Destination Folder:** A text input field containing a forward slash (/) and a "Choose Folder..." button to its right.
- Version Comments:** A large empty text area for entering comments.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

3. Choose a file
4. Choose a folder
5. In "Version Comments", enter the file name and description, if applicable

OR

Drag and drop the file from your desktop to the repository

### To create a folder

1. Click on More, the “Files” and “Library” tabs will appear
2. Click on the “Files” tab, a menu will appear

Simcoe County Data Consortium

BROWSE **FILES** LIBRARY

Home  
Resources  
Photos  
Discussion Board  
Useful Websites  
Calendar  
Terms and Conditions  
Contact Us  
Manage Users

Simcoe County Data Consortium  
**Resources**

Below is a list containing resources we would like to share with the community. Our goal is to make this repository the primary source for all the files we want to share with all our partners.

Depending on your permissions, you may be able to upload a file of your own, but before any file is shared to the community, **it will require approval by the site owner.**

**How to upload a file:**  
To upload a file, drag and drop it from your desktop to the repository below.

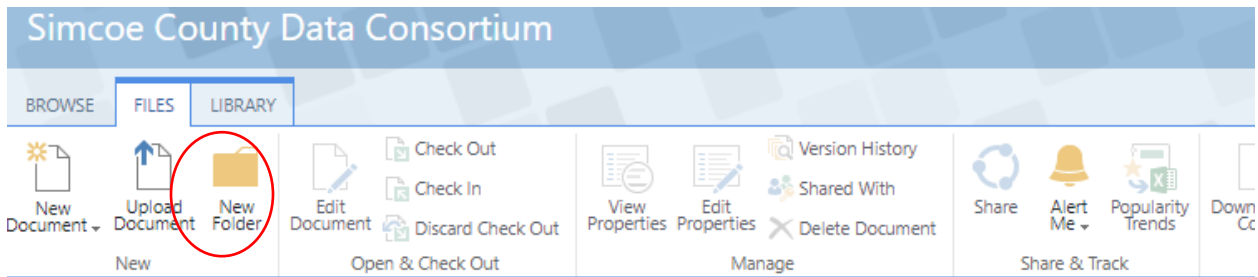
Alert me when documents are changed or added Manage My Alerts

New Upload Sync Share **More**

All Documents ... Find a file

✓	Name	Created
	Consortium Meeting Notes	... February 27

3. Select “New folder”



Home

Resources

Photos

Discussion Board

Useful Websites

4. A window will appear, enter a name
5. Click on "Create"
6. Drag and drop the files already uploaded in the newly created folder

Below is a list containing resources we would like to share with the community. Our goal is to make this repository the primary source for all the files we want to share with all our partners. Depending on your permissions, you may be able to upload a file of your own, but before any file is shared to the community, **it will require approval by the site owner.**

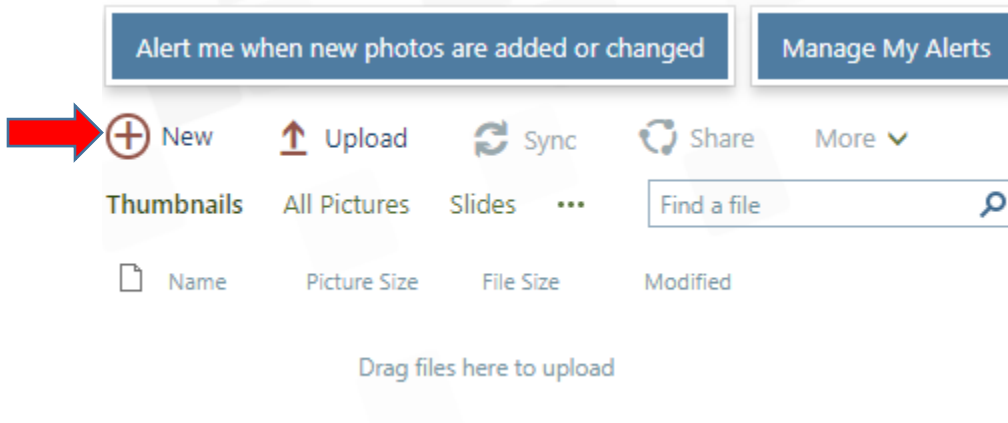
## Photos

This section is a repository of photos meant to be shared with all of the Simcoe Data Consortium members and users.

**Note:** Depending on your permissions, you may be able to upload a file, but before any file is share, it will require approval by the site owner

### To upload a file

1. Go to "+New" upload the file



## 2. A window will appear

Add a document

Choose a file  Browse...

Upload files using Windows Explorer instead  
 Add as a new version to existing files

Destination Folder  Choose Folder...

Version Comments

OK Cancel

3. Choose a file
  4. Choose a folder
  5. In "Version Comments", enter the file name and description, if applicable
- OR
- Drag and drop the file from your desktop to the repository

## Discussion Board

This discussion board is a space to ask questions, post ideas and share knowledge. All site users have the ability to contribute to the discussions. We encourage you post content.

### To create a new discussion

1. To create a new discussion, click the [new discussion] link
2. Be sure to click "I am asking a question and want to get answers from other members" if you would like other visitors to respond to your questions

### To reply to an existing discussion

1. To reply to an existing discussion, click on the discussions heading and from there you will be presented with a [Reply] link.

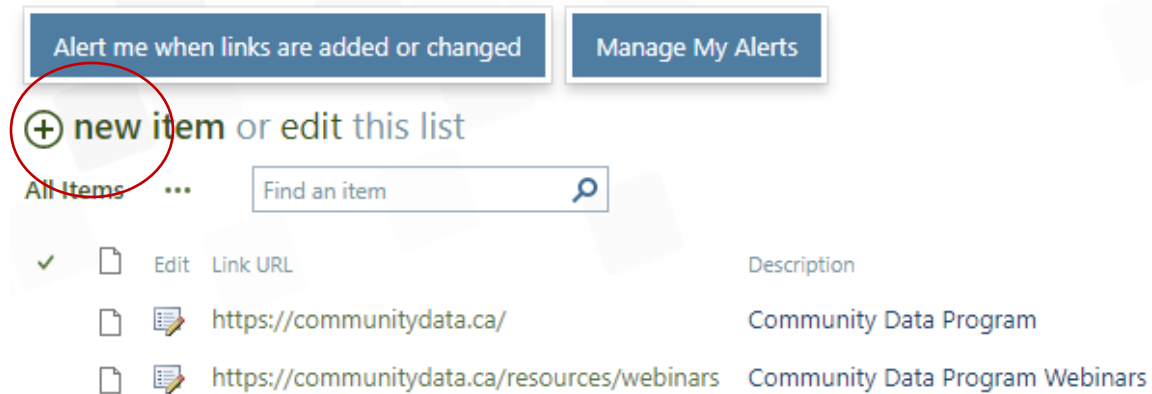
## Useful Websites

The "Useful Websites" section is used to share links of useful websites for Simcoe County Data Consortium members and users.

Depending on your permissions, you may be able to add your own links to the list.




1. To add a new link, simply select the [new item] link



2. Add a Title, the website hyperlink, and a description if applicable

The screenshot shows a form with the following fields and controls:

- Title \***: A text input field.
- Link URL**: A text input field with the placeholder text "Type the Web address: (Click here to test)". The field contains "http://".
- Description**: A text input field with the placeholder text "Type the description:". The field is empty.
- Buttons**: "Save" and "Cancel" buttons at the bottom right.

3. To edit an existing link, select the  icon to the left of the link

## Calendar

This calendar is used to post important items such as meetings, events, conferences and more. Depending on your permissions, you may be able to add items to the calendar.

1. To add items, simply hover over a specific date and click on [+ Add]. The following window will appear:

Calendar - New Item

EDIT

Save Cancel Paste Copy Attach File Spelling

Commit Clipboard Actions Spelling

Title \*

Location

Start Time \*

End Time \*

Description

Category

All Day Event  Make this an all-day activity that doesn't start or end at a specific hour.

Recurrence  Make this a repeating event.

Save Cancel

2. Enter a Title, Location, start and end time, description and select a category.

- To edit an existing item, click on the item and you will be presented with the items properties to update

**Simcoe County Data Consortium**

BROWSE **EVENTS** CALENDAR

New Event View Event **Edit Event** Version History Event Permissions Delete Event Attach File Alert Me Workflows Approve/Reject Tags & Notes

New Manage Actions Share & Track Workflows Tags and Notes

2020  
Jan Feb Mar  
Apr May Jun  
Jul Aug Sep  
Oct **Nov** Dec  
Today is Wednesday, November 11, 2020

This calendar is used to post important items such as meetings, events, conferences. Depending on your permissions, you may be able to add items to the calendar.

- To add items, hover over a specific date and click on [ + Add ].
- To edit an existing item, click on the item and you will be presented with its properties.

Alert me when new calendar items are added or changed Manage My Alerts

Calendars in View  
**Calendar**

Home Resources Photos

November 2020

SUNDAY	MONDAY	TUESDAY	WEDNESDAY
1	2 9:00 pm - 10:00 pm Test	3	4
8	9	10	11

**Note:** Calendar can be shared with other contacts. To do so, double click on the event, then click on “shared with”, and add a person’s email address. Events can also be exported in Outlook. To do so click on the “Custom Commands”, and “export”.

**Simcoe County Data Consortium**

BROWSE **EVENTS** CALENDAR

New Event View Event **Edit Event** Version History Event Permissions Delete Event Attach File Alert Me Workflows Approve/Reject Tags & Notes

New Manage Actions Share & Track Workflows Tags and Notes

2020  
Jan Feb Mar  
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Today is Wednesday, November 11, 2020

This calendar is used to post important items such as meetings, events, conferences. Depending on your permissions, you may be able to add items to the calendar.

- To add items, hover over a specific date and click on [ + Add ].
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Alert me when new calendar items are added or changed Manage My Alerts

Calendars in View  
**Calendar**

Home Resources Photos

November 2020

SUNDAY	MONDAY	TUESDAY	WEDNESDAY
1	2 9:00 pm - 10:00 pm Test	3	4
8	9	10	11

Calendar - Test

VIEW CUSTOM COMMANDS

Shared With Alert Me Workflows

Share "Test"

Shared with lots of people

Invite people They'll also get access to the 'Simcoe County Data Consortium' site and the sites that share permissions with it.

Shared with

Enter names, email addresses, or 'Everyone'.

Include a personal message with this invitation (Optional).

## Manage Users

Only an employee with a member status will be able to manage users. A member will be able to add new "visitor" users.

To add a new user

1. To add a new visitor, select " Add Community Partner (Visitor)"

Please select the type of user management operation you wish to perform.



### Add New Visitor

*A visitor is someone who can read all files and contribute to the discussions*

[Add Community Partner \(Visitor\)](#)

[Add Simcoe County Employee \(Visitor\)](#)

2. Complete the information using the new user email as a username:

Employment Ontario Partners

 [EDIT LINKS](#)

## Add a New User (Viewer)

Use the below form to add a new user with "Visitor" permissions. A user of this type of user **does not** have the ability to add, update or delete files.

**Please remember to use the users email address as their username.**

User Name ( \*\* Please use the users email address \*\* ):

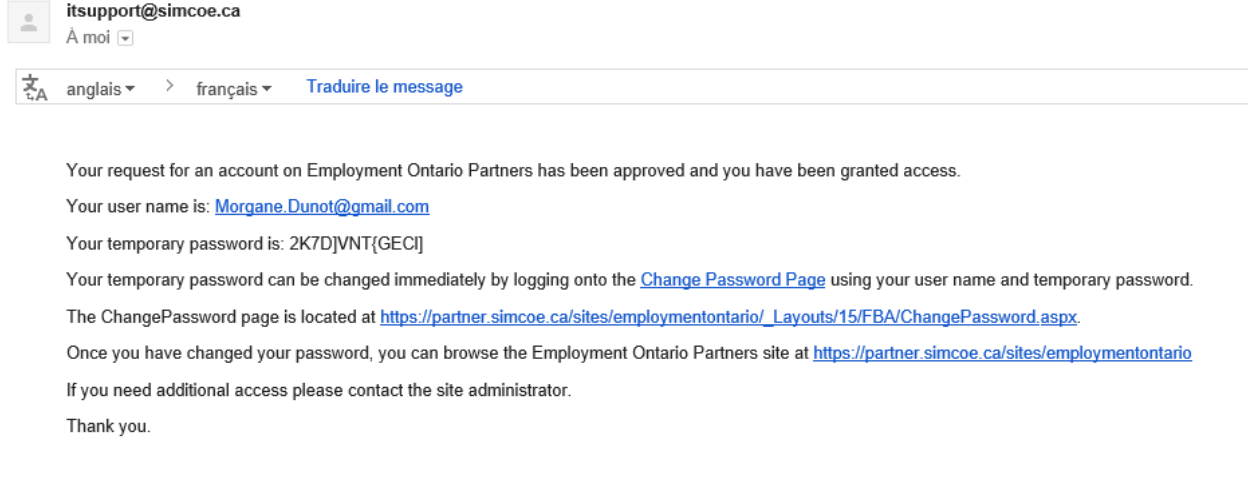
First Name:

Last Name:

Email:

[Create New User \(Visitor\)](#)

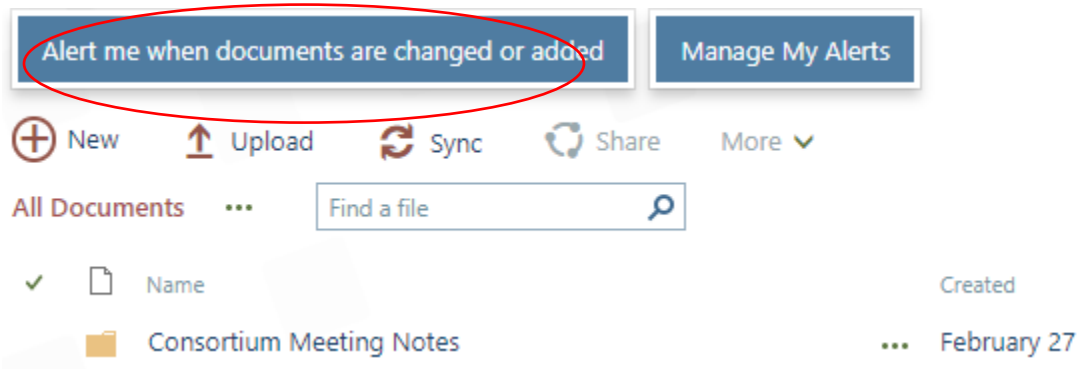
### 3. The new user will receive the following email:



## Managing Alerts

**Note:** This option may not appear for all users

1. Go to Resources, and/or Photos, and/or Discussion Board, and/or Useful Websites, and/or Calendar
2. On the top left corner click on "Alert me when documents are changed or added"



3. Select your alert preferences
4. Click [OK]

**Note:** To manage all alerts - Go to "Manage Alerts" and add the ones you want

## Contacts

Please email Victoria Chapman at: [victoria.chapman@simcoe.ca](mailto:victoria.chapman@simcoe.ca) if you have any questions.