

WORKSPACE USER GUIDE



As of September 2020

ABOUT NDIA CONNECT

NDIA Connect, an online community providing broad resources for defense professionals, is the latest member benefit from NDIA and its Affiliates. By enabling conversation, connection, and collaboration, NDIA Connect provides our members, including our Chapters and Divisions, a reliable source of information for topics related to the defense industrial base and supply chain, news about association happenings and event updates, as well as broad content related to national security and defense. We are confident that NDIA Connect will foster progress and innovation in your personal and professional lives by expanding both your knowledge base and network. To learn more, visit [NDIA.org/Membership/About-NDIA-Connect](https://www.ndia.org/Membership/About-NDIA-Connect).

Logging In

You can log into NDIA Connect either by clicking the “Sign In” button in the upper right-hand corner of Connect.NDIA.org or by clicking the “NDIA Connect” button in the upper-right hand corner of [NDIA.org](https://www.ndia.org).

Once on the NDIA Connect sign-in page, enter your email address or NDIA Customer ID. If possible, use the “FORGOT PASSWORD?” link. However, if you are not sure of your login information, including your customer number, contact the NDIA Membership Team at Membership@NDIA.org. Then, enter your credentials and click the “LOGIN” button to proceed into NDIA Connect.

Exploring Communities

The NDIA Connect homepage compiles all of the content to which a given user has access, including all of the discussions and resources posted in any one of their communities. As such, it delivers a customized experience to each user, presenting content that is relevant and self-selected by the user.

However, you may use the blue main navigation bar to explore the rest of the platform and specific communities. Click the “Communities” tab and select “My Communities” to quickly access the communities of which you are already a member. Or, select “All Communities” to view a list of communities available for you to explore and join. Selecting a community will open its homepage, where members of that community can post discussions, add to the Resource Libraries, post NDIA Division events, view member information, and collaborate within the Workspace module if the given community has one.

THE WORKSPACE MODULE

Workspace is an additional module of NDIA Connect that enables members of a given Chapter community to participate and collaborate anywhere with document sharing and editing functionalities. Workspace is generally a centralized hub for working documents that are not yet finalized.

Finalized documents should be stored in the community’s Resource Libraries. Beyond document-related work, Workspace allows for ballots to be cast, enabling members of each Workspace to ask questions, acquire certain approvals, or elect new positions.

**Please note: Not all communities are eligible to have a Workspace; eligibility depends on community configuration and membership.*

Features

Workspace provides your group the ability to work on files that are in progress. The work shared in Workspace cannot be viewed by the entire community. Community members will need to be assigned a group role (see below) to participate in the Workspace. Once documents and projects are finalized in the Workspace, it is recommended that documents are then transferred to the community library for the rest of the community to view.

NDIA encourages our Divisions to move much of their business conducted via email to NDIA Connect. This approach allows ease of use, proper documentation, and standardization of practice. Throughout this guide, you will read about the different features that the Workspace module offers. Here are some cases that would best utilize the Workspace module’s features:

- Collaboration on white papers and studies
- Editing conference agendas
- Voting (e.g. Board elections)
- Storage of Division documents (e.g. Meeting notes, speaker trackers)

Roster & Group Roles

Individuals on the Workspace roster and overall members of the community will have different security permissions. Community members do not automatically have access to the Workspace module; they must first be assigned one of the four standard group roles:

- Chair
- Co-Chair
- Member
- Staff Liaison

Each role has different permissions regarding managing, creating, and editing aspects of the Workspace module. For example, individuals with the Chair or Co-Chair group role can manage (add, edit, and/or delete) action items, folders, documents, and the roster. Alternatively, individuals with the Member group role functions solely as a user and, thereby, does not have any management privileges other than the ability to download the roster. It is recommended that the Chair and Co-Chair group roles be assigned to the Division Chair and Co-Chair, respectively.

Folders

NDIA HQ Staff will provide prepopulated folders across all Division Workspace modules. It is recommended that the Community Admin from the Division have a discussion with the Division Board about adding folders specifically required to enhance the given Division's operation.

Prepopulated Folders

- Events – Documents related to planning annual Division events, in-person or virtual Division meetings, etc. (e.g. Event agendas, speaker trackers, planning timelines)
- Meeting Minutes – Notes and minutes from Division calls or meetings
- Committee Reports – Documents or tasks specific to Division subcommittees

New Folders

- Any additional folders or sub-folders desired or required by the group should be communicated to the Division's NDIA HQ Staff liaison so that they may be created

Documents

The documents feature of the Workspace module allows you to upload files and create different folders for sharing with your community, serving as the foundation of collaboration.

New Documents

- Click the red "Add" button and complete the known and required details, though they can be modified at a later time
 - Document Display Title: Highly recommended
 - Document Download: Optional
 - Document Number: Optional

- Document Source: Required
 - Description: Highly recommended to be concise but specific, including information about what type of feedback and comments are sought after
 - Submitter: Highly recommended to enhance historical data
 - Submission Date: Required
 - Technical Contact: Optional; to add co-author
 - Folder: Required
 - State: Required
 - Related Projects: N/A
 - Comment Permissions: Highly recommended that comments be allowed to be added by document viewers
 - Notifications: Recommended
- When under a time crunch, you may opt to choose "Quick Add" from the "Add" button's drop-down menu to upload a document and add the details at a later time
 - Select file to upload
 - Determine state of document: Draft or Final
 - Place document in appropriate folder
 - Determine notification setting
 - Click "Upload" to add document to the Workspace

Final Documents

- Mark a finalized document as "Final" in the Workspace module
- Create an approval ballot for the group to vote to approve the final document
- Transfer the approved final document to the community's Resource Libraries for future reference and use
- Notify the entire community of the document transfer

Comments, Revisions, & Approval Ballots

Comments and revisions are the crux of the Division's collaborative work as they enable real-time conversations and updates to take place. Once a document is uploaded with the correct comment permissions, members of the community can provide feedback. However, if individuals would instead like to make changes to the contents of the document, they may lock and download the document, make their changes, and upload a revision.

New Comment

- Lock the document to ensure no efforts are duplicated or overwritten
- Open the "Download" button's drop-down menu and select "Add a Comment"

- Complete the known and required details
 - If your comment is on the macro-level and touches on the overall concept of the document, it is recommended that this is expanded on in the Summary portion of the form
 - If your comment is specific or regarding format/grammar/spelling, it is recommended that you input a specific Section, Page, and/or Line.
- New Revision
 - It is recommended that revisions be made based on comments received
 - ◊ Lock and download the document
 - ◊ Make any edits to the document
 - ◊ Upload the updated document as a revision of the original document
 - The final revision should produce a document in its final form as opposed to a draft form, which is then transferred to the community's Resource Libraries for future reference
- New Approval Ballot
 - It is recommended that an approval ballot is conducted when determining if a given document is ready for finalization and distribution
 - NDIA Connect will automatically populate this ballot via the drop-down box options
- Revoting: Optional; recommended that individuals may only vote once per ballot
- Referenced Items: Optional; include if applicable (e.g. biographies or applications)
- Sharing Results: Configurable; recommended that only ballot creators can view the results

Action Items

The Workspace module allows specific action items to be assigned to specific members of the Division community. This tool can be used for items such as conference planning, roster reviews, and volunteer recruitment.

New Action Item

- Toggle to the "Action Items" page of the Workspace module
- Click the red "Add" button and complete the known and required details
 - Subject: Required
 - Description: Required
 - Comment: Optional
 - Priority: Highly recommended; should be discussed with the action officer
 - Due Date: Highly recommended; should be discussed with the action officer
 - Owner: Required; to be the action officer

Ballots

Ballots are useful in completing a variety of Division tasks, including holding board elections or deciding on the location of the annual conference or the date of the next Division meeting.

New Ballots

- Toggle to the "Ballots" page of the Workspace module
- Click the red "Add" button and complete the known and required details
 - Title: Required
 - Question: Required
 - Description: Required to provide context that is crucial for historical data
 - Ballot Options: Required to customize ballot
 - Opening/Closing Date: Required
 - Timezone: Required; recommended to remain U.S. Eastern Time
 - Who Can Vote: Required; depends on the ballot's contents and purpose
 - Voter Management: Highly recommended to remain "Yes"
 - Official Ballot: Optional; recommended that only board elections are marked as "Official"

CONTACT US

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Technical Difficulties

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