OCSE Collaboration Tool
Quick Start Guide for Child Support Directors

ADMINISTRATION FOR
CHILDREN & FAMILIES

Office of Child Support Enforcement
330 C Street, SW
Washington DC 20201

July 19, 2021
Version 2.0

1 Introduction

> **Version Update:** **This "v2.0" version of the Quick Start Guide adds information about the newest site for IV-D Directors as of July 2021.**
>
> The new site is called "State Systems Information (non-confidential)" and contains two categories of information:
>
> - Training documents and videos presented by OCSE's Division of State and Tribal Systems. Examples include the "Streamlined Feasibility Study" webinar from 9/23/2020 and "APD 101/201" webinar from 12/3/2020.
>
> - The "State Characteristics Matrix – General" Excel document that includes information that is important to consider when investigating state system modernization.

This Quick Start Guide helps child support directors and their designees register, login, and use the Alfresco sites in the new OCSE Collaboration Tool.

- Registering and accessing the new Collaboration Tool differs from the OCSE Child Support Portal, where users are authenticated through each state's network.

- Examples of "sites" include "Data Analytics/Reporting for IV-D Directors," "State Systems Information (non-confidential)", and "Digital Marketing".

- Approval for users may be different depending on the Alfresco site.

  - Data Analytics and State Systems sites: The child support director appoints a "Point of Contact" (POC) to approve users.
  - Digital Marketing, Intergovernmental Case Processing, or other grant related sites: Only grant recipients and other authorized users may access the site. The OCSE Division of Program Innovation staff approves users.

- The OCSE Help Desk for the Collaboration Tool can be contacted at dcs.eteam@acf.hhs.gov.

2 Table of Contents

Contents

3 New Registrations for the Collaboration Tool

Access the Collaboration Tool through this link: https://ocsecollab.acf.hhs.gov/ocsecollab/home

This chapter is intended for users who have never registered for any site in the Collaboration Tool. See Chapter 5 if you have registered for the Tool but want access to a different site than your initial registration request.

3.1 Initial Registration screen:

You will see the following screen, where you may choose either Register or New User:
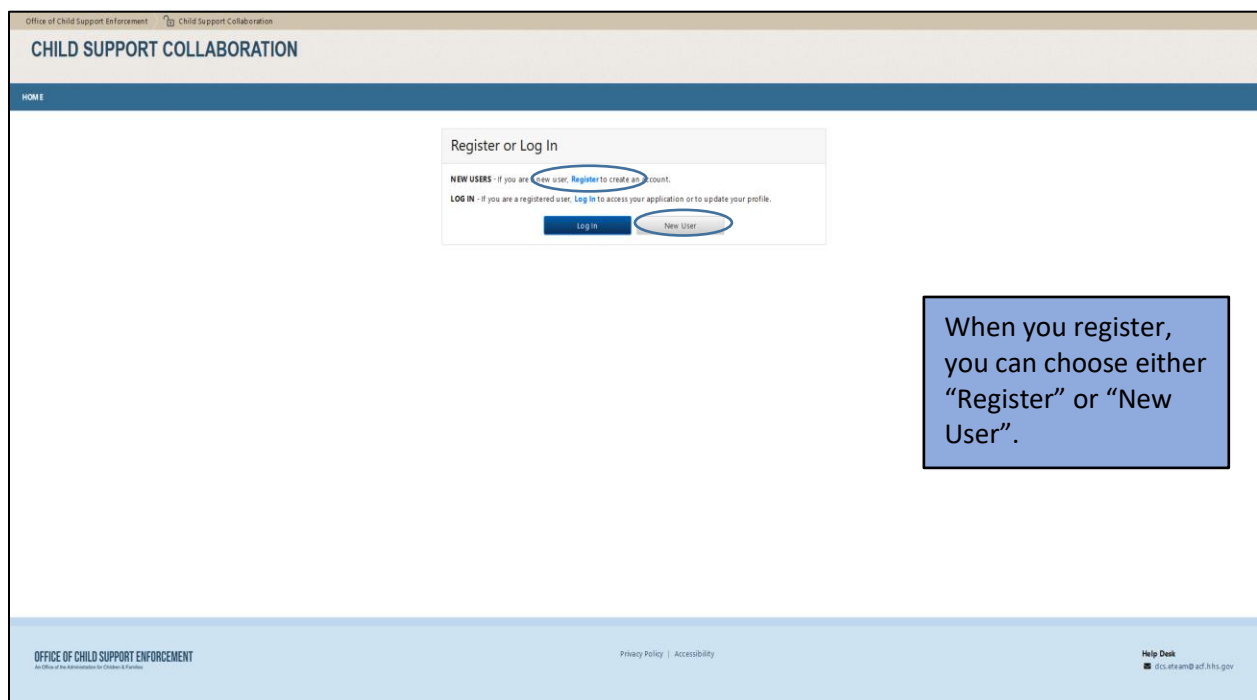
Tip 1: This same screen is used for registering as well as subsequently logging in to the Collaboration Tool.

Tip 2: Save the link above to your "Favorites" to make it easier to access every time.

3.2 User Registration screen:

Complete the information on the **User Registration** page.

If you can't see the graphic below very clearly, the sections are listed on the next page.

Tip 1: Choose the correct Site from the dropdown in the first section.

Tip 2: Pay close attention to the rules for User ID and Password. For example, you can only use lowercase letters in your User ID.

Tip 3: The yellow "!" icon by the Employer item is a reminder to contractors to list the government agency and their private sector employer name.

Tip 4: The Collaboration Tool requires Two Factor Authentication and gives you a choice of Voice or Text at the bottom. If you choose Text, you will also need to enter your provider.

Tip 5: Your name, email, and employer information will carry over to the User Profile in Alfresco.

Here is the list of sections in the graphic above:

- **Site Information**: There will be several sites in the drop-down box. Choose "Data Analytics/Reports for IV-D Directors" or "State Systems Information (non-confidential)".
- **Personal Information**:
  - First Name, Middle Initial, Last Name
  - Email Address, Confirm Email Address, Work Phone Number, Confirm Work Phone Number
- **Employer Information**:
  - Employer (read the "!" note)
  - Job Title
  - City, State
- **Security Information:**
  - Create User ID, Confirm User ID
  - Create Password, Confirm Password
- **Security Questions:**
  - Security Question 1, Answer 1
  - Security Question 2, Answer 2
  - Security Question 3, Answer 3
- **Two Factor Authentication Information:**
  - Delivery Method: Voice or Text
  - Phone Number, Phone Extension if applicable (if you choose Voice) or Phone Number, Service Provider (if you choose Text)

3.3 Review screen:

Once you "Submit" on the previous screen, you will be taken to a **User Registration – Review screen** and asked to 1) review your information and 2) test your Two Factor Authentication.

- Review and confirm the information is correct. If not, hit the "Return to Make Changes" button at the bottom of the screen.
- Once you confirm everything is correct, test your Two Factor Authentication. Look toward the bottom of the screen under the "Verification" item and choose "Request".
- You should receive an access code either via text or phone call. After you enter the code, hit "Confirm" at the bottom of the screen.


Reminder: Review your information *before* you request the access code. If something is incorrect, use the "Return to Make Changes" button at the bottom to enter your edits.

Tip: Note your User Name, Password, and answers to the Security Questions. (Upper and lower case matters!) Password changes will be required every 90 days.

3.4 User Registration Confirmation screen:

Once you Confirm (after double-checking your information and making sure the Two Factor Authentication works), you'll see the following screen:
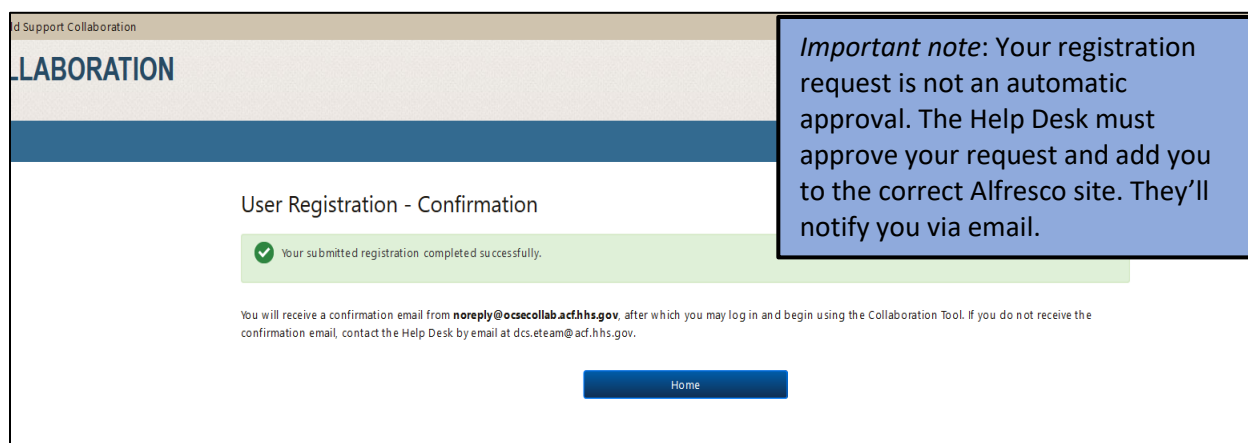
The OCSE Collaboration Tool Help Desk is working on your access to the Tool, and on setting you up as a user in the Alfresco site you chose while registering.

Tip: As noted in the Introduction above, this process may include obtaining approval from the child support director's approval POC, *so it won't be immediate*.

3.5 Approval Email:

You'll receive an email when your request is approved and you're set up in Alfresco. Use the link in your email to login and access the Alfresco site.
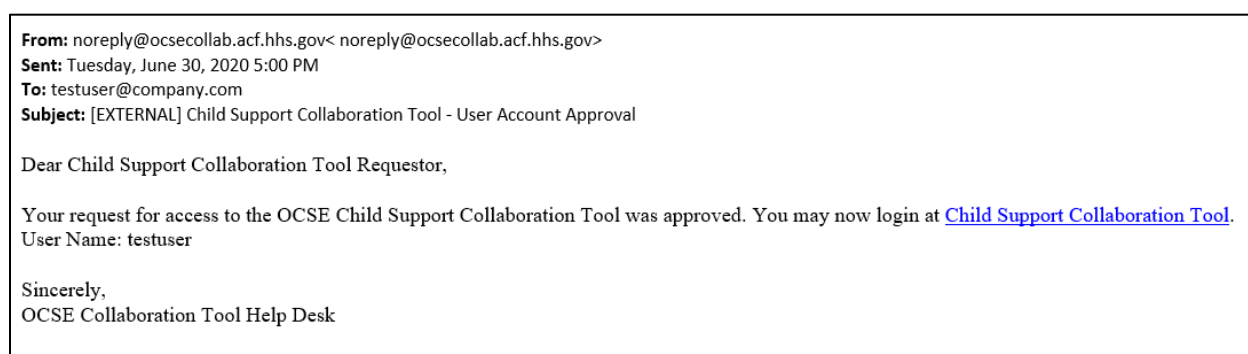
4 Logging In to the Collaboration Tool

After approval, you can log in to the Collaboration Tool using the same link you used to register. (It is also in the approval email you received.) https://ocsecollab.acf.hhs.gov/ocsecollab/home

4.1 Initial Login screen:

The link takes you to the following screen, where you can choose either the blue "Log In" button or link.
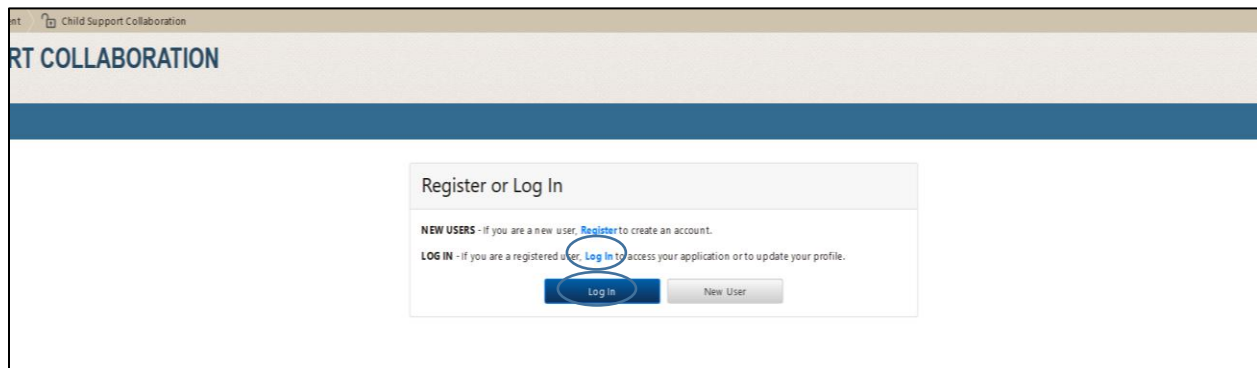
4.2 Log In Password screen:

Enter your User ID and Password and choose "Log In" again.
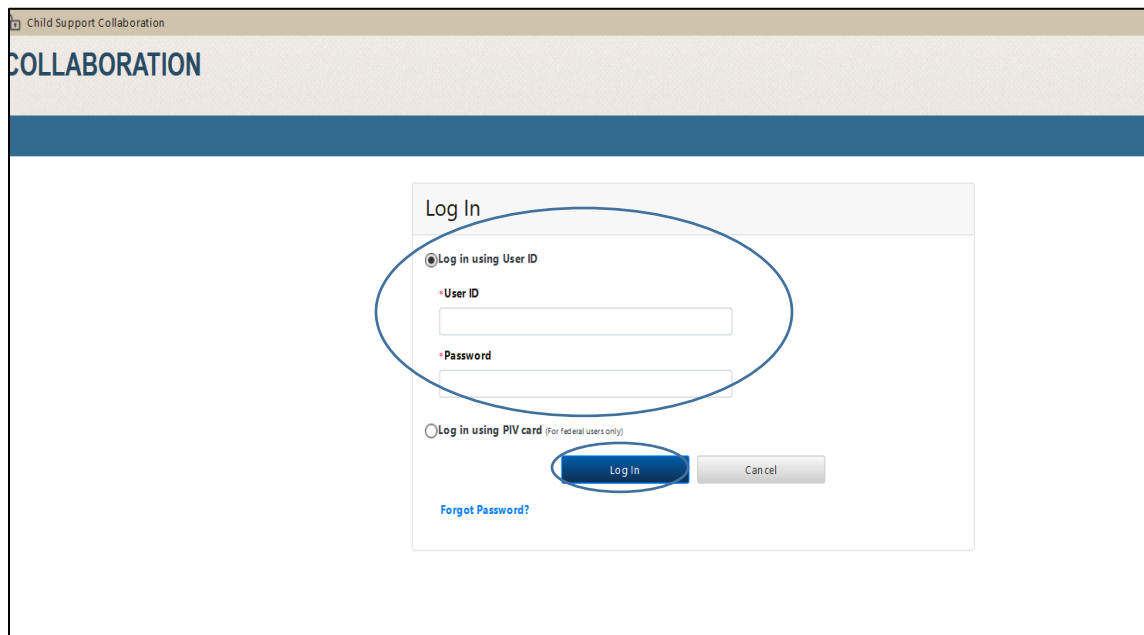
Tip 1: The User ID and Password must be exact – pay attention to lowercase and uppercase.

Tip 2: Ignore the "PIV card" option – that is for OCSE users only.

4.3 Access Code screen:

Shortly after you hit enter on the previous screen, you should receive an access code via your preferred method (text or voice). Enter the code and hit submit.

Tip 1: The access code will expire in ten minutes. Use the Resend button if necessary.

Tip 2: If you have issues, contact the Help Desk via the dcs.eteam@acf.hhs.gov email at the bottom right of the screen.

4.4 Launch screen:

After successfully entering the access code, you can "launch" the Collaboration Tool and go into the Alfresco sites you may use.

Tip: Use the "Update User" button next to the "Launch Collaboration Tool" to change your registration information, such as your phone number.

5 Accessing a New Site after Initial Registration

Once you have successfully registered in the Collaboration Tool for a particular site, the process is slightly different if you wish to access another site. An example of this situation is when you or your staff are already registered for the "Data Analytics and Reporting for IV-D Directors" site, and the same staff want to access the new "State Systems Information (non-confidential)" site.

Note that the steps are different depending on whether the user is a child support director or an approved designee:

IV-D Directors: If you are already registered for the Data Analytics site, you have been automatically added as a user to the State Systems site. (The reverse will also be true if you do pick the State Systems site when you do your initial registration for the Collaboration Tool.)

Approved State Designee: If you are already an approved user for one of the sites, you don't need to re-register for the overall Collaboration Tool. However, you will need to be approved by your IV-D Director or his/her approval "Point of Contact (POC)" before you can access a different site.

- o To request access, please email the OCSE Help Desk at dcs.eteam@acf.hhs.gov. Be sure to include the name of the site in your email – i.e. "Data Analytics and Reporting for IV-D Directors" *or* "State Systems Information (non-confidential)".

- o The Help Desk will check with the IV-D Director's POC, and once you are approved you will receive an email from dcs.eteam@acf.hhs.gov. The email will say:

    Dear Alfresco site requestor,

    Your request for access to one of the IV-D Director sites in the OCSE Collaboration Tool was approved. You may now login at https://ocsecollab.acf.hhs.gov/ocsecollab/home.

    Sincerely,

    OCSE Collaboration Tool Help Desk

- o Once you receive the email, you access the Collaboration Tool the same way as before through the link. Your Personal Dashboard should now show the second site. See Chapter 6.

6 Using Alfresco

6.1 What is Alfresco?

Alfresco is a document management tool, similar to SharePoint. It allows for the exchange of documents and files – Word, PowerPoint, PDF, Tableau Reader, videos, etc.

- You'll have a "Personal Dashboard" which shows information on all the sites you have authority to access. (Many users will only have one or two sites.)
- Each of your sites has a Site "landing page" which contains folders and documents for you to view or download. The landing page will be the "Document Library" in Alfresco.

6.2 Alfresco Personal Dashboard

6.2.1 Personal Dashboard:

The most important part of your personal dashboard is the "My Sites" section.

You'll see the site(s) you have access to – when you hover over the site name, it'll become a link you can click on.

Once you click on the site name, you'll go to the site's landing page, which is the Document Library.

6.3 Alfresco Site Dashboard and Contents

6.3.1 Document Library Dashboard:

The dashboard for the sites will be the Document Library so you have quick access to the folders and files you need.

This screen shot shows the folders in the "Data Analytics and Reporting for IV-D Directors" site.

- The first folder contains the PowerPoint presentations given at the NCCSD-sponsored Data Analytics webinars. These give you background and latest status of the project.

- The second is the folder for the Current Support Deep Dive Analysis.

- The third is the folder for the Income Withholding Order Percent of IV-D Collections reports.

- The fourth is the main folder for the Undistributed Collections reports from the project. (Once you click on it, you will see three subfolders.)
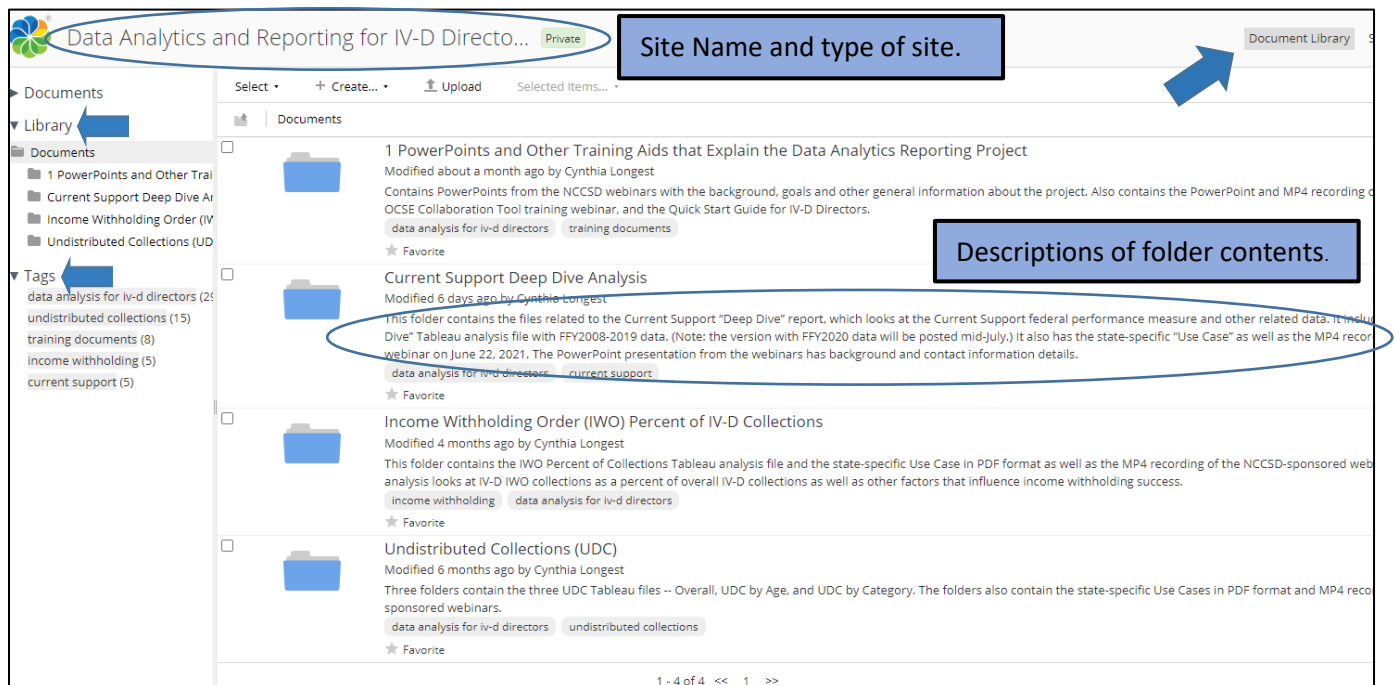
Tip 1: The type of site is next to the site name. This site is "Private" so that others in the Collaboration Tool cannot find it.

Tip 2: You can hover over the folder icon or folder name and click on it to go to the next screen.

Tip 3: The "Library" at the far left allows you to easily navigate between folders within each site.

Tip 4: Clicking on a "Tag" at the far left allows you to see all documents with that tag. For example, clicking on the "undistributed collections" tag brings up all 15 documents related to UDC, regardless of which folder they are in.

6.3.1   Document Library Dashboard, cont.:

<u>This screen shot shows the folders in the "State Systems Information (non-confidential)" site.</u>

- The first folder is for the "State Characteristics Matrix – General Information" which is an Excel spreadsheet that can be downloaded.

- The second is the folder for the "APD 101-201" training webinar materials.

- The third is the folder for the "Streamlined Feasibility Study" training webinar materials. It also contains the Action Transmittal AT-20-16 and the Guide and templates released with the AT.
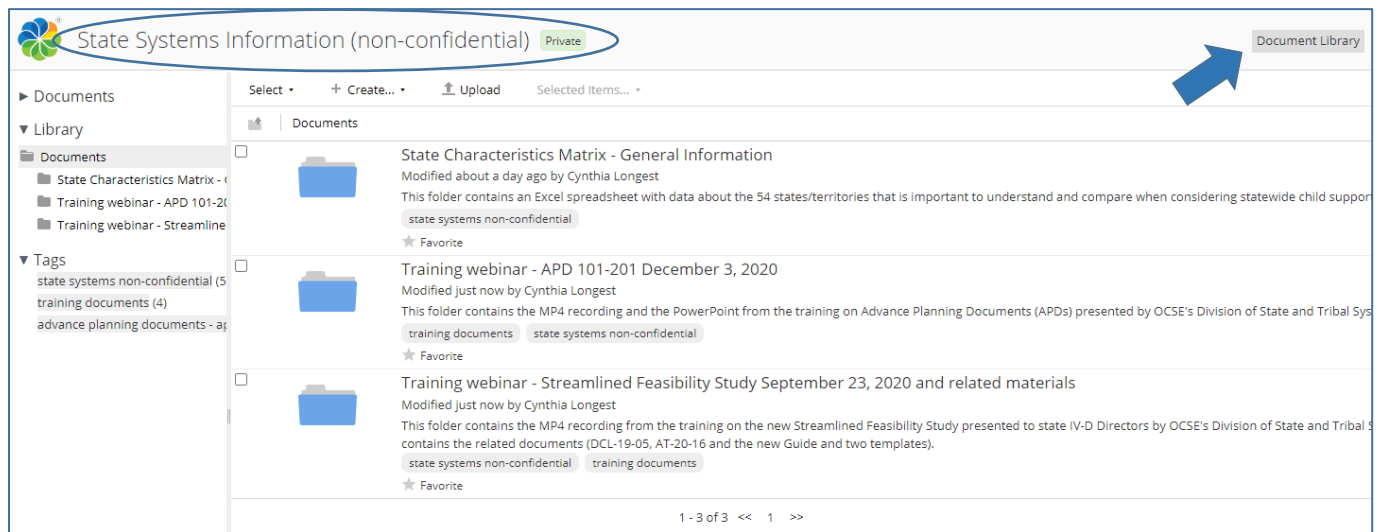
6.3.2 Folder Contents:

Once you click on a folder, you will be taken to a screen with all of the various documents within that folder.

As an example, on Data Analytics site, if you click on the "Income Withholding Order (IWO) Percent of IV-D Collections" title, you'll see these folder contents:

- The first file is the Tableau Reader file from the IWO webinars. Note the "twbx" extension. This is the file that you want to download so that you can do your state specific analysis.

- The second is the example "Use Case" that was shown at the webinars, featuring Kentucky. It is a PDF file.
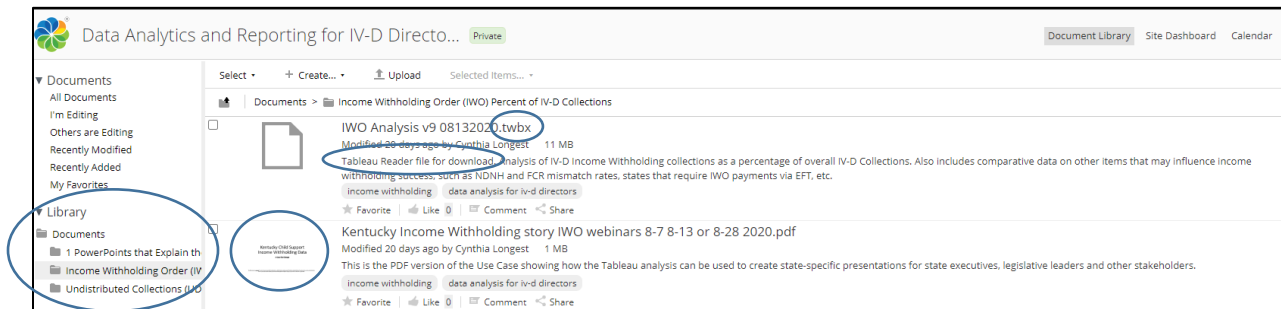
As another example, on State Systems site, if you click on the "Training Webinar -- APD 101-201 December 3, 2020" title, you'll see these folder contents:

- The first file is the PowerPoint companion to the recording of the training webinar.

- The second is the recording from the webinar. Note the "mp4" extension. The descriptions for the MP4 videos include the size and length of the file, and when the various topics start within the recording and PowerPoint.
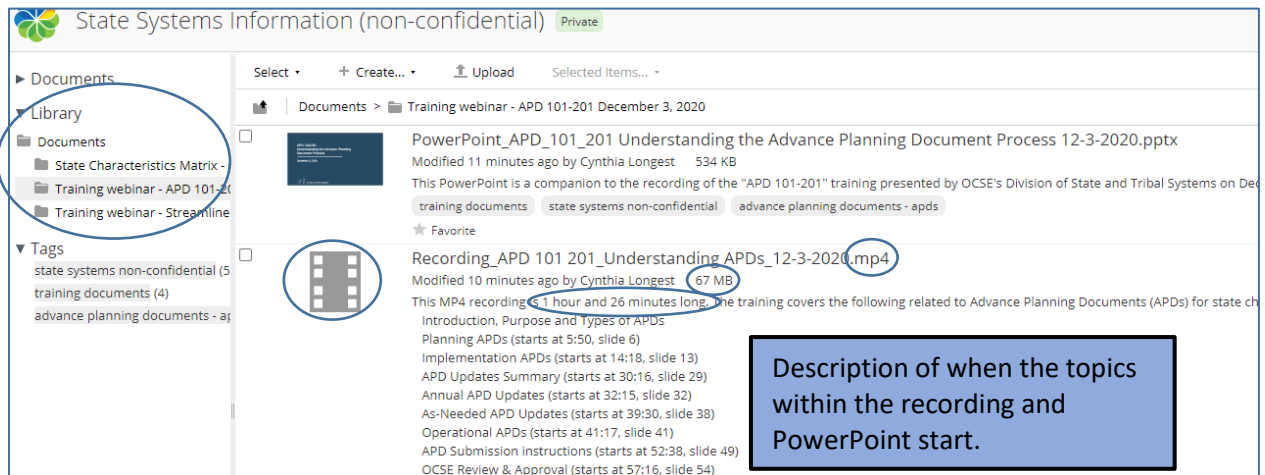

Tip 1: The "Library" will have the relevant folder highlighted to show where you are in the site.

Tip 2: If you hover over any of the icons to the left of the file names, you can click on them as well.

6.3.3   Previewing or Downloading files:

Most files can be previewed within the Collaboration Tool before downloading. (However, there are two types of files that can only or should only be downloaded.)

Previewing files: This screen shows what you get when you click on the "Kentucky Income Withholding story" file within the IWO folder in the Data Analytics site. You can preview the PDF by clicking on the "Previous" or "Next" arrows. You can also see what page you're on.
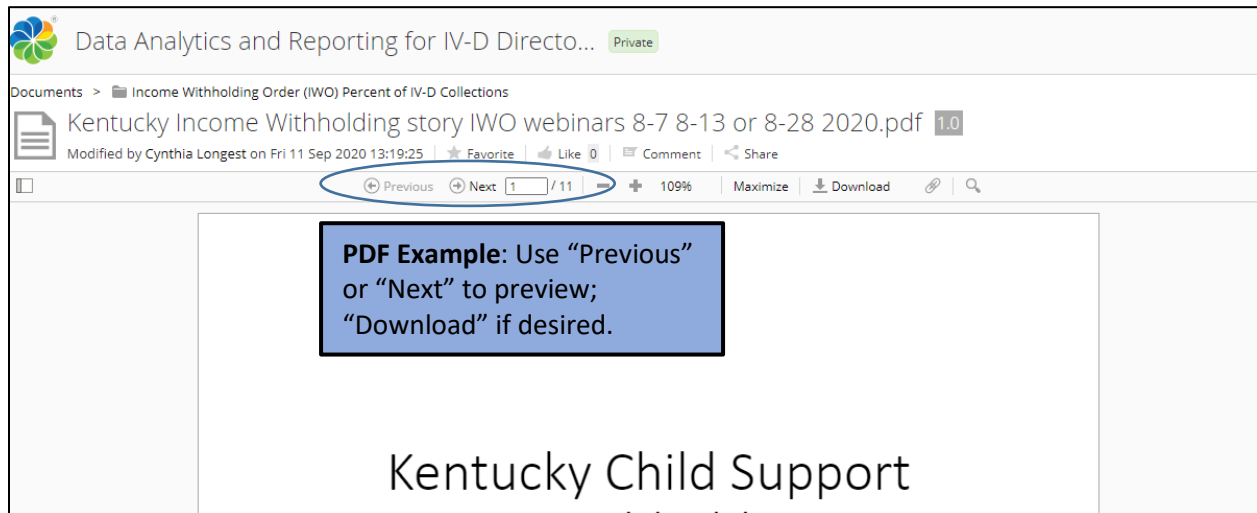
Downloading files that can be previewed: Click on the "Download" button to the right of the "Previous" and "Next" arrows. Some documents, such as the "Streamlined Feasibility Study Template" in Word below, will give you the option to download the original or PDF version.
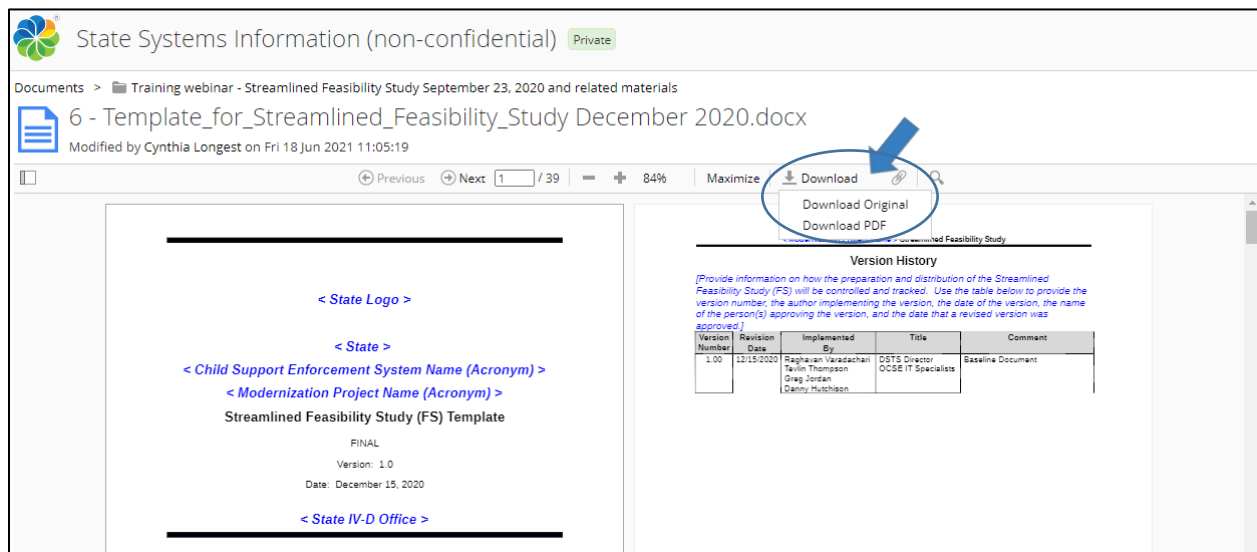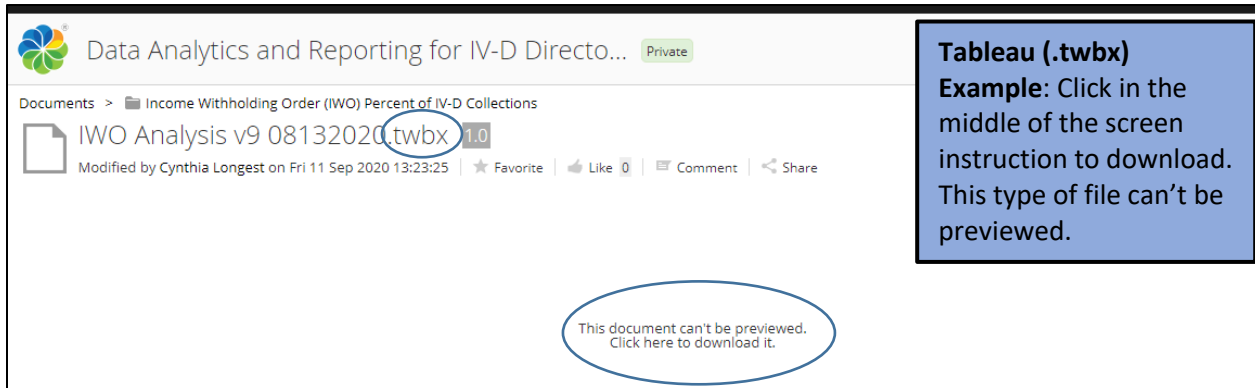

Tip 1: Use the preview function (for files other than Tableau or recordings) so that you can decide whether you want to take the time to download.

Tip 2: The download process will differ, depending on your browser. For example, in Chrome it saves to your "Downloads" folder. In Internet Explorer, you have an option to open or save.

Downloading files that can't be previewed: You cannot preview Tableau files, and you should be cautious with watching MP4 recordings within Alfresco because Alfresco times out in 30 minutes, and the recordings are significantly longer. If it times out, your preview will start over. Some recordings in Alfresco do not give the option to preview.

Tableau Reader: This screen shows the "IWO Analysis" Tableau Reader file in the Data Analytics site. Follow the instruction "*This document can't be previewed. Click here to download it.*"

Tableau (.twbx) Example: Click in the middle of the screen instruction to download. This type of file can't be previewed.

MP4 recordings: Use the "Download" button on the far right of the screen. For some recordings, you may see an error message, but you will still be able to download.
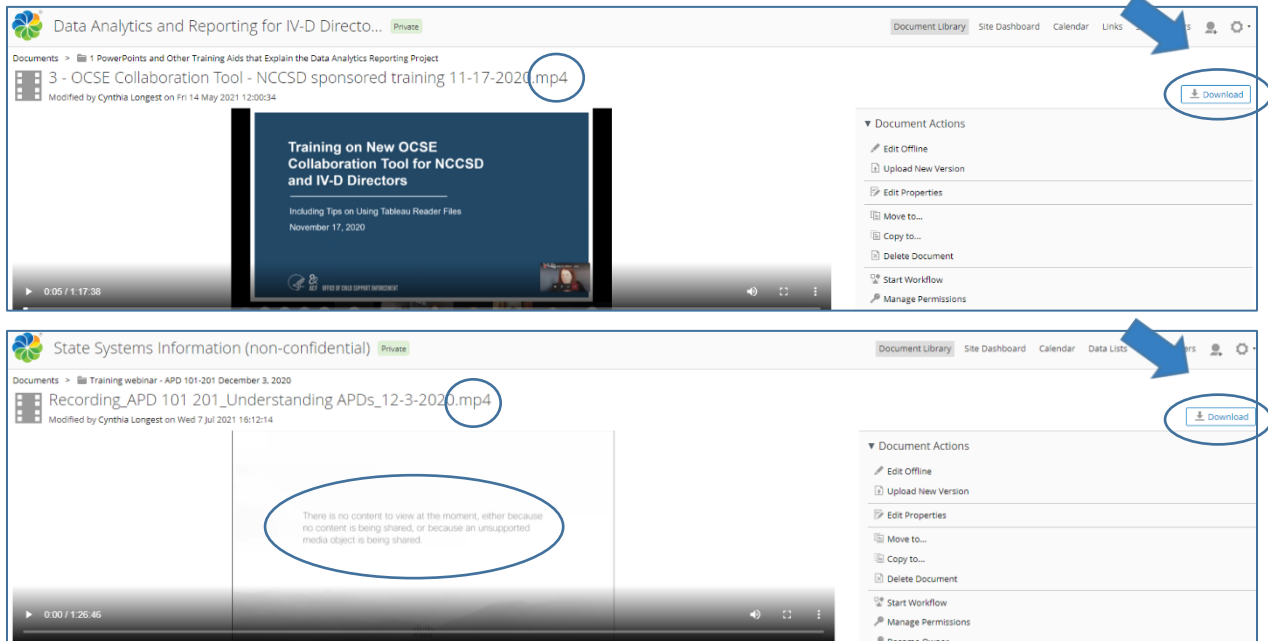

Tip 1: Tableau Reader files will always have the "twbx" extension. They tend to be relatively large so they may take longer to download. The IWO Tableau file seen on page 15 is 11 MB.

Tip 2: Webinar recordings will always have the "mp4" extension. They are very large and will take longer to download. The APD 101-201 webinar recording seen on page 15 is 67 MB. (The Streamlined Feasibility Study webinar recording is 145 MB and the Collaboration Tool training webinar from November 2020 is 462 MB.)

7 Miscellaneous

7.1 Navigating Back:

- If you are in the document screen and want to get back to the folder, click on the folder name above the title of the file.

- From anywhere, if you want to get back to your Personal Dashboard, click the "**Home**" option in the black banner at the top.

- From anywhere, if you want to get back to the "Launch Collaboration Tool" screen (see page 10 above), click on the "**Collaboration Home**" option in the black banner at the top. That is the screen that gives you the option to "Update" your user information.
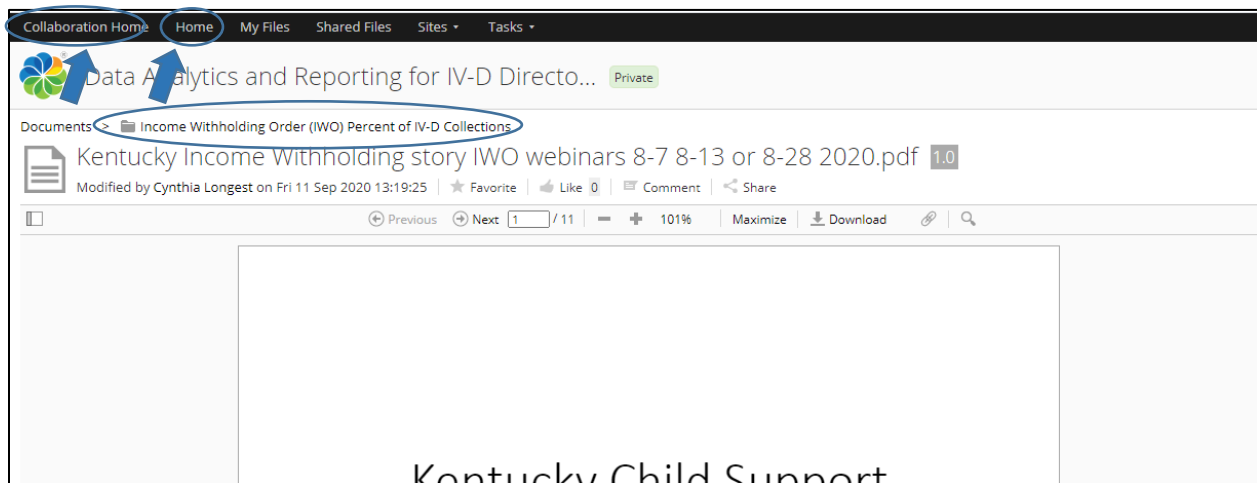
7.2 Site Members:

If you want to see who else is a member of a site, and see their titles, employer, and email addresses, click on "Site Members" at the upper right.
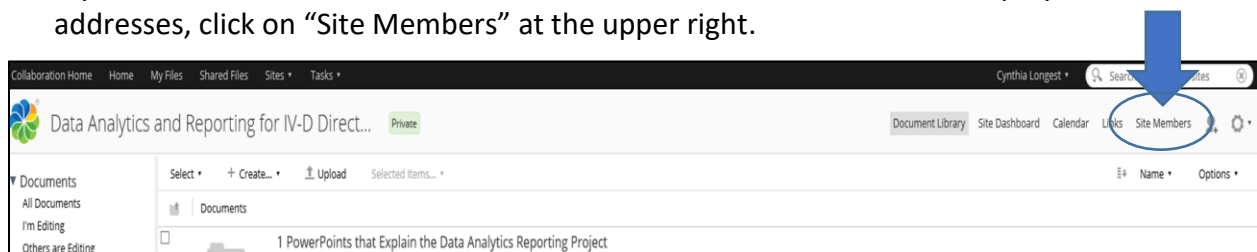
Tip 1: You have to be in a site to do this; you can't do it from your "Personal Dashboard."

Tip 2: Once you get the list of members, click on their name to see their information.

Tip 3: This is the information they entered when registering. It cannot be edited while in Alfresco.

7.3 Managing Your Email Notifications:

You can choose whether you want to receive notifications by email. The emails keep you up to date on events such as recent site activities. They come at midnight (if there has been activity).

- On your **Personal Dashboard**, click on "View Full Profile" under the "My Profile" area at the left.

- Then on the **User Profile Page**, click on "Notifications."

- On **User Notification Settings** page, click to turn them off or on, then click ok.