

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

1	Introduction	2
2	Table of Contents.....	3
3	New Registrations for the Collaboration Tool	4
3.1	Initial Registration screen:	4
3.2	User Registration screen:.....	5
3.3	Review screen:	7
3.4	User Registration Confirmation screen:	8
3.5	Approval Email:.....	8
4	Logging In to the Collaboration Tool	9
4.1	Initial Login screen:.....	9
4.2	Log In Password screen:.....	9
4.3	Access Code screen:.....	10
4.4	Launch screen:	10
5	Accessing a New Site after Initial Registration	11
6	Using Alfresco	12
6.1	What is Alfresco?	12
6.2	Alfresco Personal Dashboard.....	12
6.2.1	Personal Dashboard:.....	12
6.3	Alfresco Site Dashboard and Contents	13
6.3.1	Document Library Dashboard:.....	13
6.3.1	Document Library Dashboard, cont.:.....	14
6.3.2	Folder Contents:.....	15
6.3.3	Previewing or Downloading files:	16
7	Miscellaneous	18
7.1	Navigating Back:.....	18
7.2	Site Members:.....	18
7.3	Managing Your Email Notifications:	19

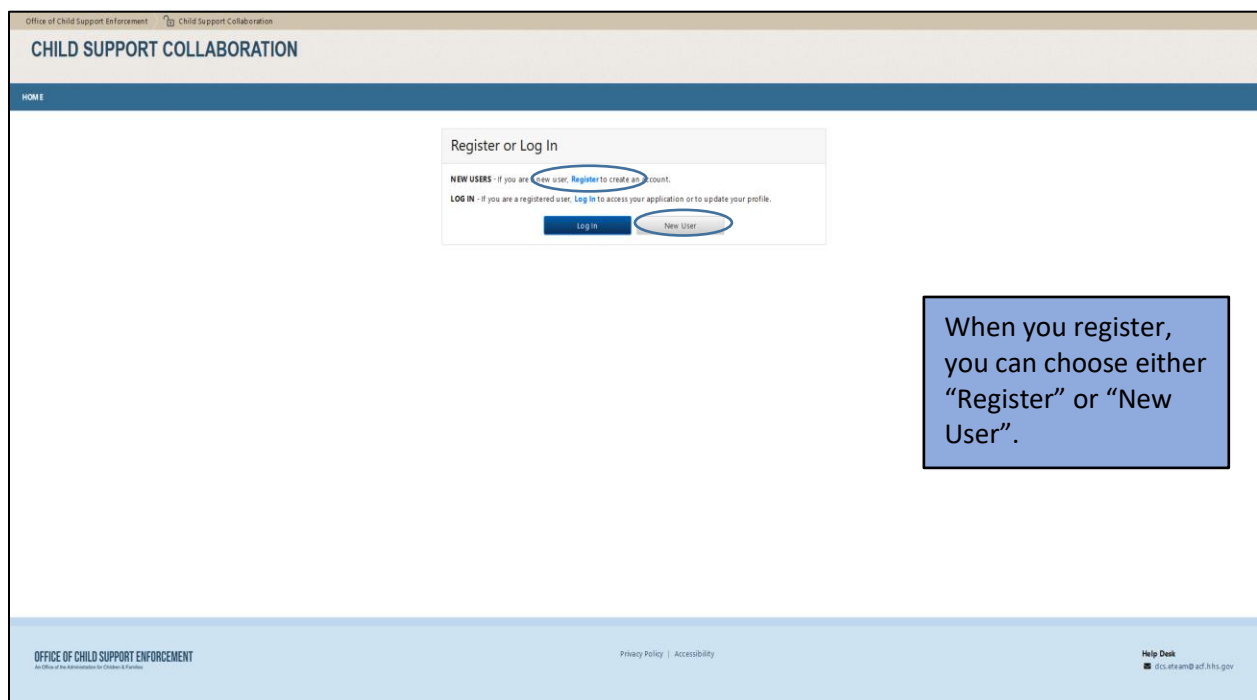
3 New Registrations for the Collaboration Tool

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.

Child Support Collaboration

COLLABORATION

User Registration

Site Information

*Site Name
Digital Marketing

Personal Information

*First Name Middle Initial *Last Name
James H Smith

*Email Address *Confirm Email Address *Work Phone Number Work Phone Extension
james.smith@boa.com james.smith@boa.com 704-704-5290 5674

Employer Information

*Employer ⓘ
Texas Attorney General

*Job Title
Deputy Director

*City *State
Houston Texas

Security Information

*Create User ID *Confirm User ID
jamestest1 jamestest1

*Create Password *Confirm Password

Security Questions

Security Question 1 *Answer 1
What is your pet's name? Issac

Security Question 2 *Answer 2
What was your childhood nickname? James

Security Question 3 *Answer 3
What was the make/model of your first car? Sonata

Two-Factor Authentication Information

For additional security, the system will ask you to provide an access code each time you log into the Collaboration Tool. You can choose to receive the access code by voice call or text message.

To receive a text message, you must select your service provider. If you do not see your service provider in the list, please contact the Help Desk.

At the end of the registration process, the system will ask you to verify you successfully received the access code by the selected delivery method.

*Delivery Method
 Voice Text

*Phone Number Phone Extension
905-670-3458 234531

Submit Cancel

For Site Information, choose "Data Analytics/Reports for IV-D Directors", or "State Systems Information (non-confidential)".

Complete all information and submit.

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.

collaboration

ORATION

User Registration - Review

Site Information
Site Name: Digital Marketing

Personal Information
Name: James Smith
Email Address: james.smith@boa.com
Work Phone Number: 704-704-5290 Work Phone Extension: 5674

Employer Information
Employer: Texas Attorney General
Job Title: Deputy Director
City: Houston
State: Texas

Security Information
User ID: jamessmith

Security Questions

Security Question	Answer
Security Question 1 What is your pet's name?	Answer 1 Issac
Security Question 2 What was your childhood nickname?	Answer 2 James
Security Question 3 What was the make/model of your first car?	Answer 3 Sonata

Two-Factor Authentication Information
Delivery Method: Voice
Phone Number: 905-670-3458 Phone Extension: 234531

Verification
You need to verify the phone number you provided.
Click **Request** to receive your access code by the chosen delivery method. The Access Code will expire in 10 minutes. You can click **Request** again to receive a new access code.
Request an access code: **Request**
Enter your access code below, and then click **Confirm**.

Access Code

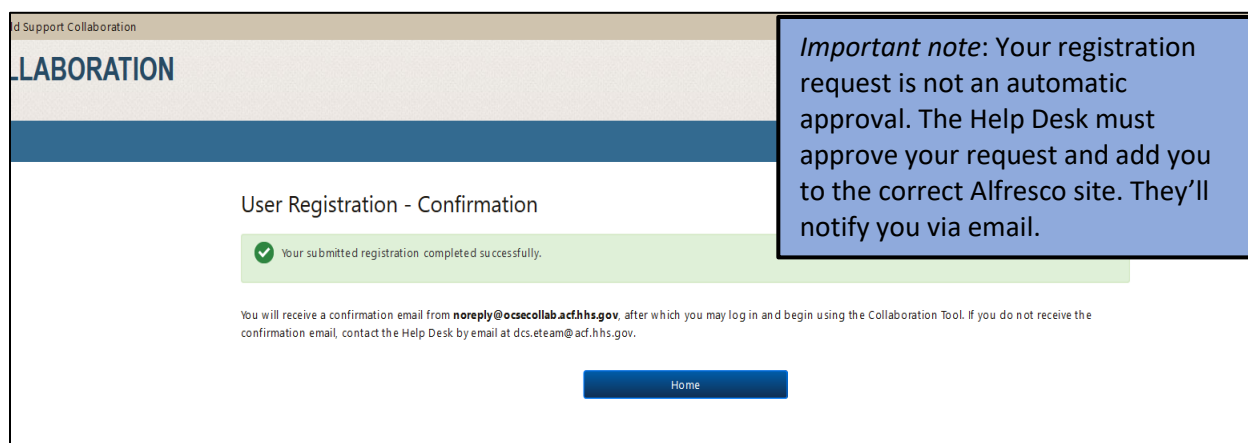
Confirm Return to Make Changes

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:

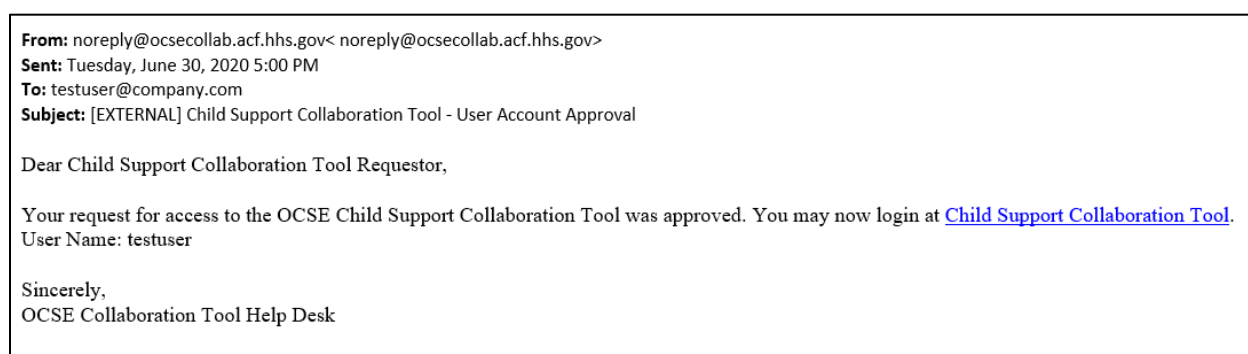


The OCSE Collaboration Tool Help Desk is working on your access to the Tool, and on setting you up as a user in the Alfresco site you chose while registering.

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.

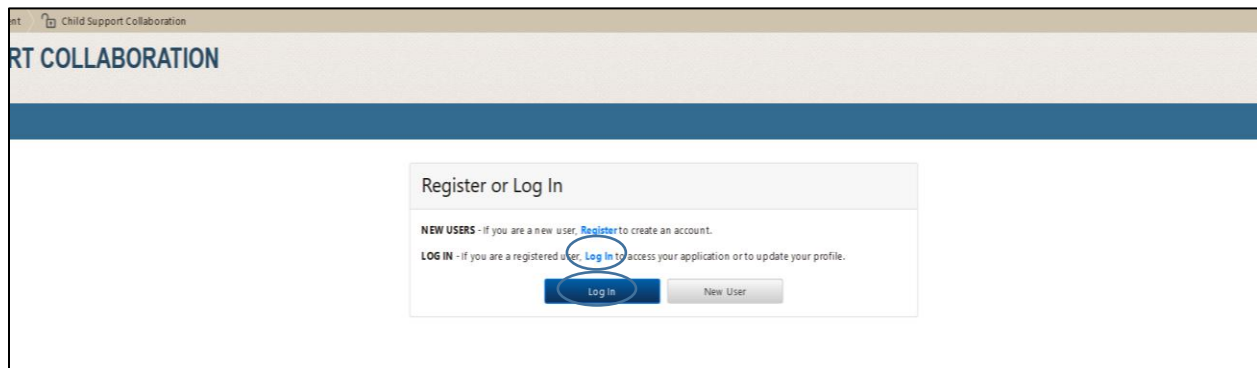


4 Logging In to the Collaboration Tool

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>

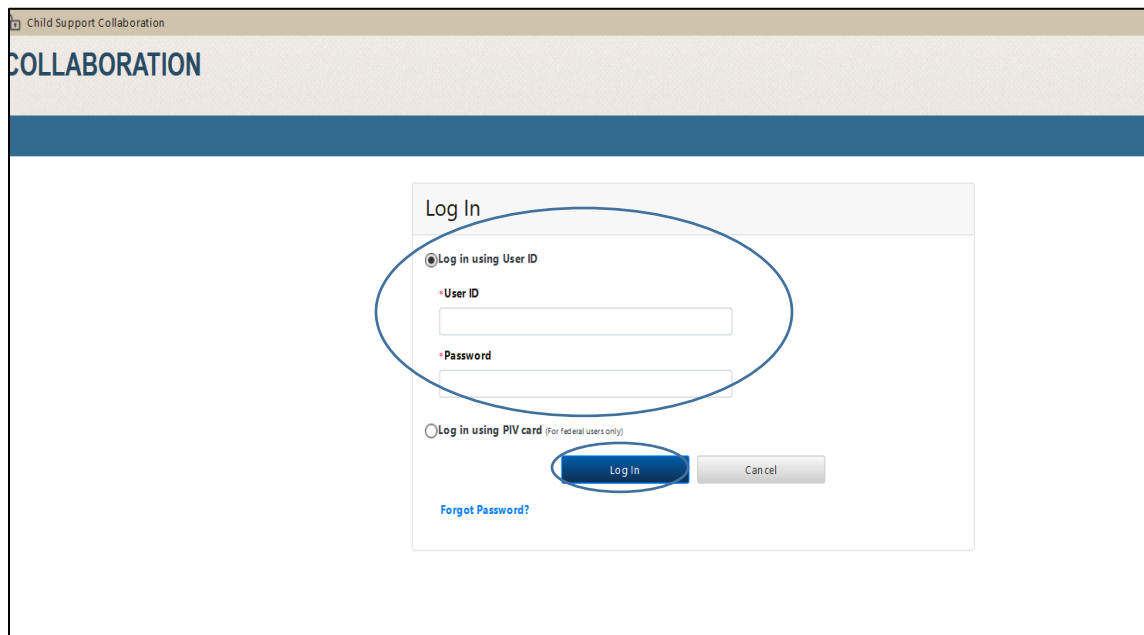
4.1 Initial Login screen:

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.

LABORATION

Login - Enter Access Code

Enter the access code you received by voice call or text message to continue. The access code will expire in 10 minutes. Click Resend to receive a new access code.

Access Code

Submit Resend Cancel

Privacy Policy | Accessibility

Help Desk
dcs.eteam@acf.hhs.gov

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.

Child Support Collaboration

You are accessing a U.S. Government information system. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

For security reasons and data protection if you remain idle on any page for more than 30 minutes, your session may time out and you will need to log in again.

Launch Collaboration Tool Update User

ENFORCEMENT

Privacy Policy | Accessibility

Help Desk
dcs.eteam@acf.hhs.gov

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.

- 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)”.
- 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

- 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.

The screenshot displays the Alfresco Personal Dashboard for user Cynthia Longest. At the top, the navigation bar includes 'Collaboration Home', 'Home', 'My Files', 'Shared Files', 'Sites', and 'Tasks'. The user's name 'Cynthia Longest' is circled in blue, and a callout box points to it with the text: "The Personal Dashboard reflects the name you used when registering." Below the navigation bar, there is a 'GET STARTED' section with a lightbulb icon and a link to 'Take a quick tour of Alfresco Share or learn about advanced features.' The main content area is divided into several sections: 'My Profile' (showing the user's name, email 'cynthia.longest@acf.hhs.gov', and contact information), 'My Activities' (showing recent activities), and 'My Sites'. The 'My Sites' section is highlighted with a blue arrow and contains three site entries: 'Data Analytics and Reporting for IV-D Directors' (with a description about Tableau Reader files), 'Digital Marketing' (with 'No Description'), and 'State Systems Information (non-confidential)' (with a description about state child support systems). Each site entry has a 'Favorite' button. A 'My Calendar' section at the bottom shows 'No upcoming events'.

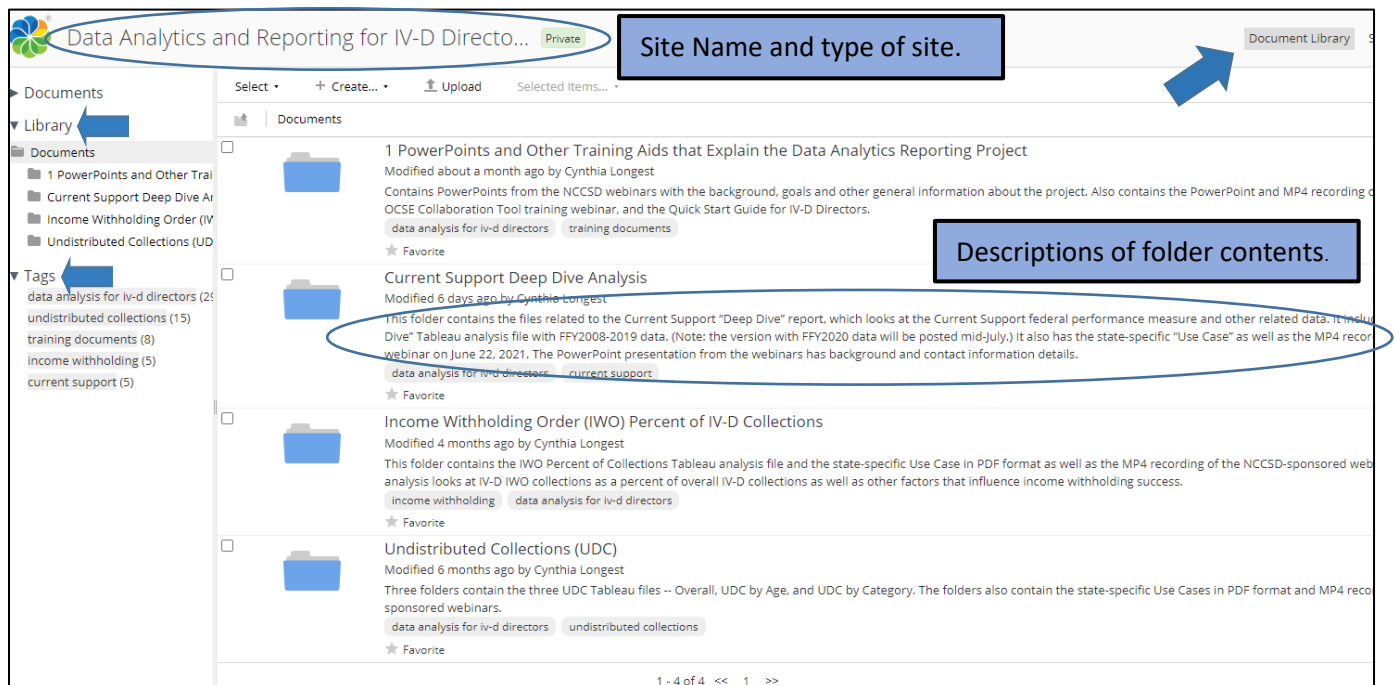
6.3 Alfresco Site Dashboard and Contents

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.

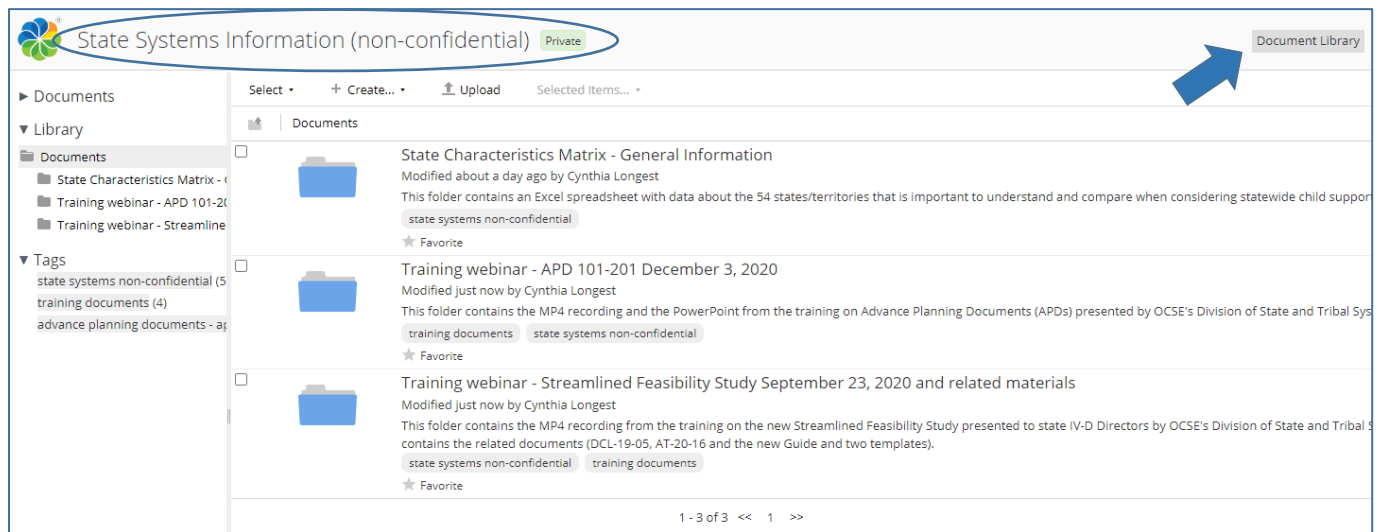
Tip 3: The “Library” at the far left allows you to easily navigate between folders within each site.

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.:

This screen shot shows the folders in the “State Systems Information (non-confidential)” site.

- 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.

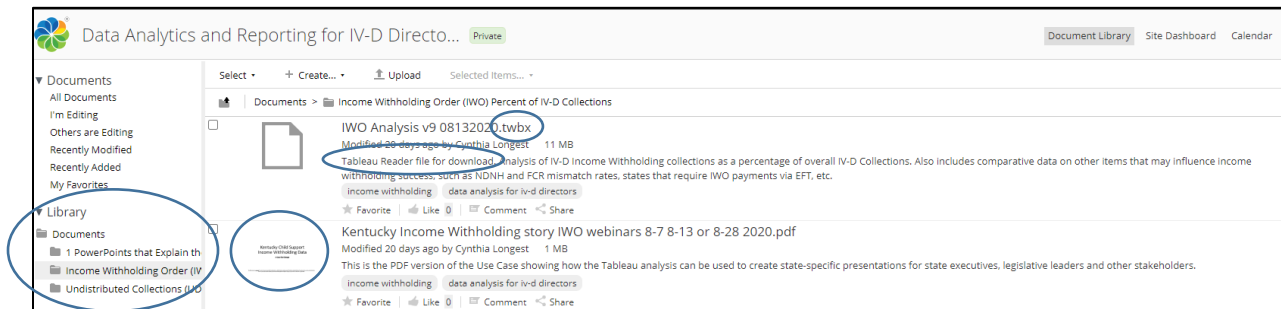


6.3.2 Folder Contents:

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

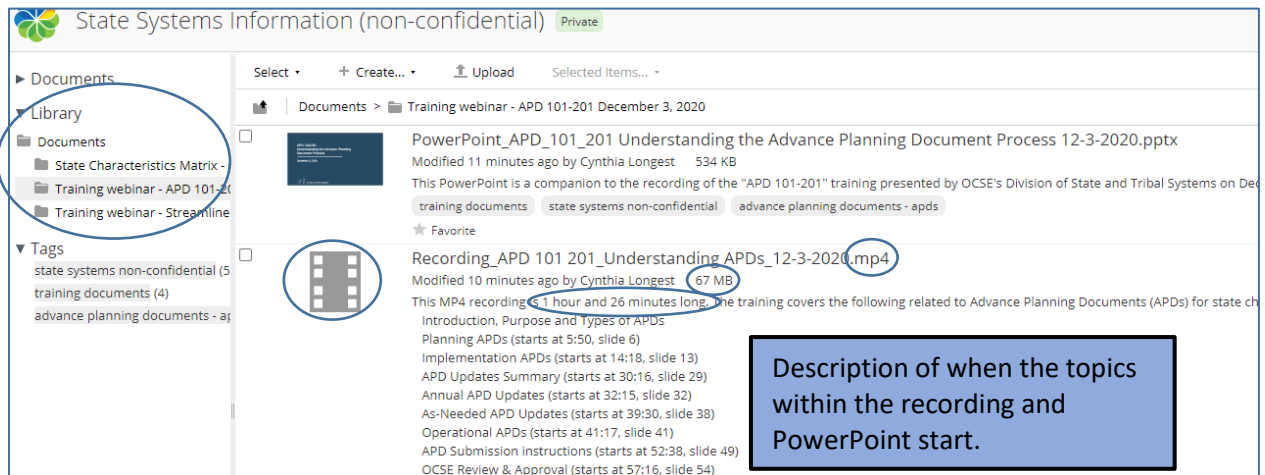
As an example, on Data Analytics site, if you click on the “Income Withholding Order (IWO) Percent of IV-D Collections” title, you’ll see these folder contents:

- 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.



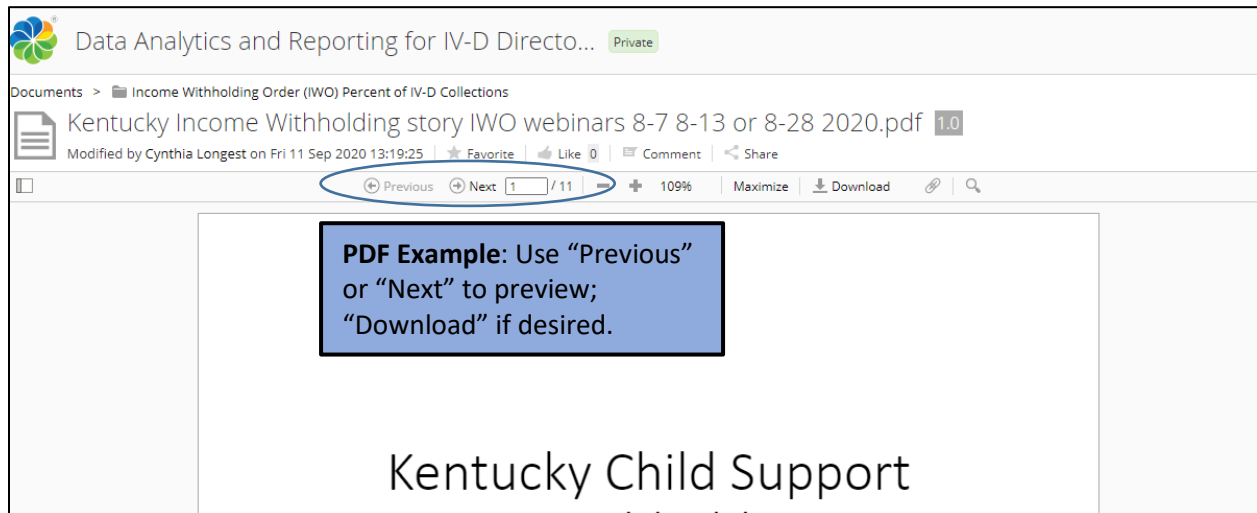
Tip 1: The “Library” will have the relevant folder highlighted to show where you are in the site.

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

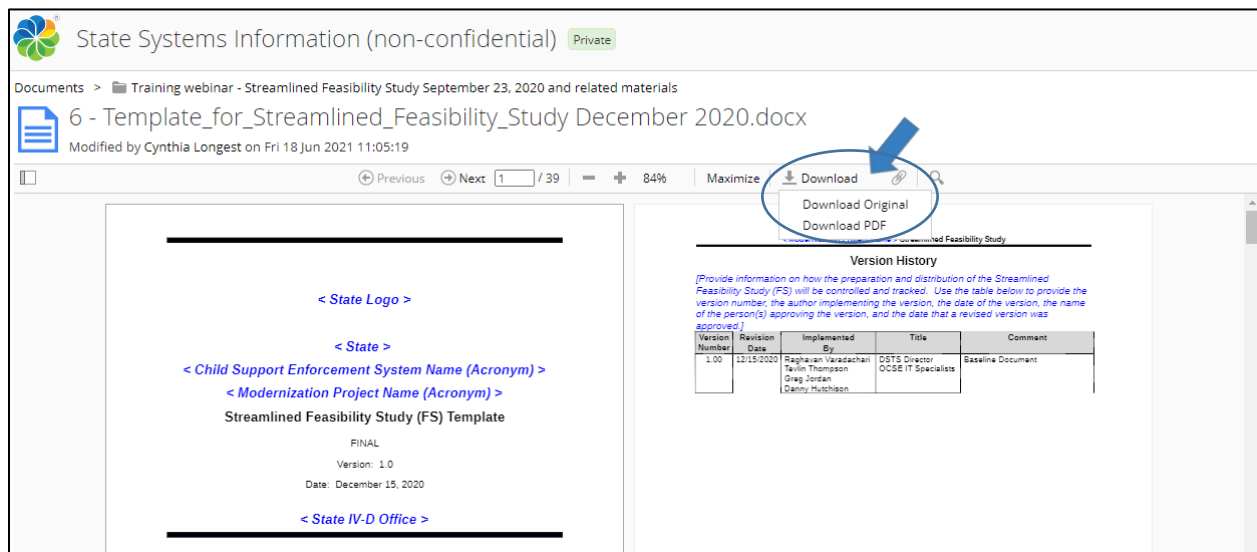
6.3.3 Previewing or Downloading files:

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.

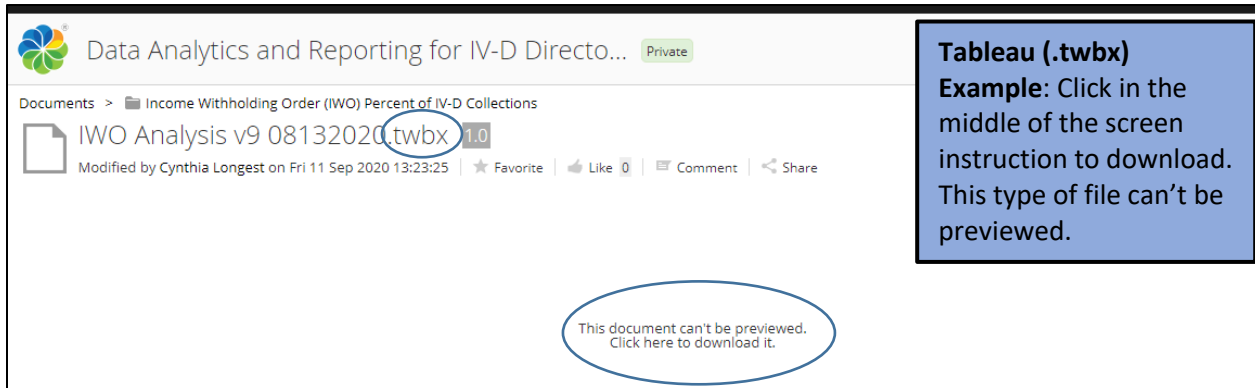


Tip 1: Use the preview function (for files other than Tableau or recordings) so that you can decide whether you want to take the time to download.

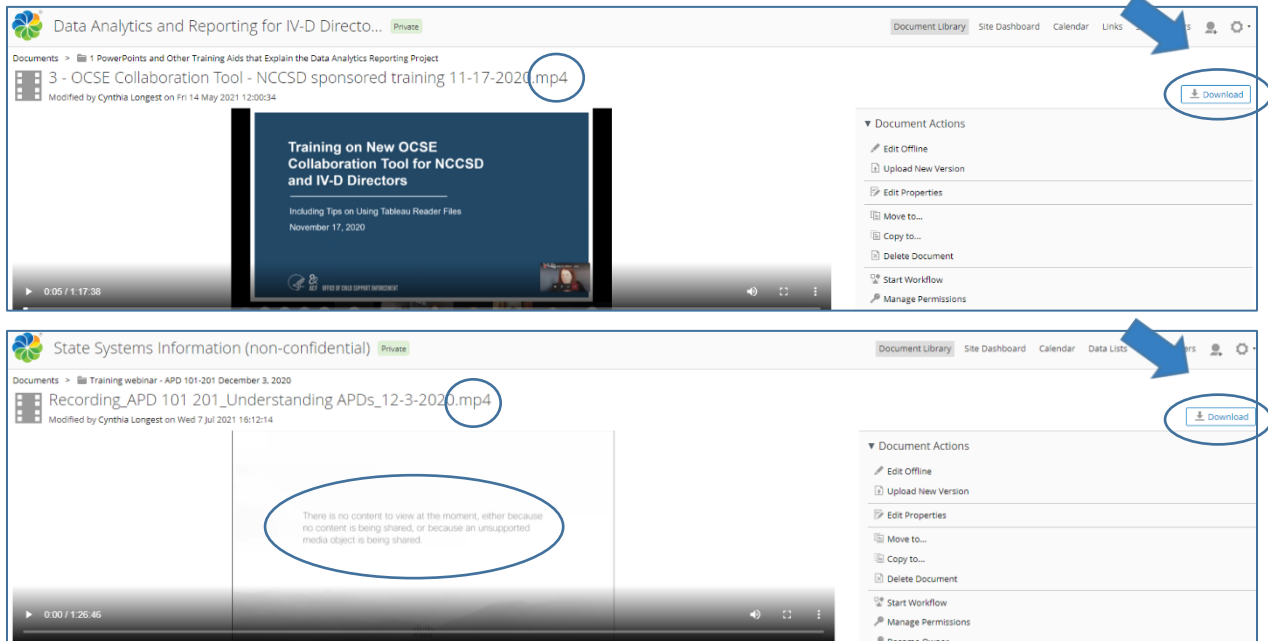
Tip 2: The download process will differ, depending on your browser. For example, in Chrome it saves to your “Downloads” folder. In Internet Explorer, you have an option to open or save.

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."



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.



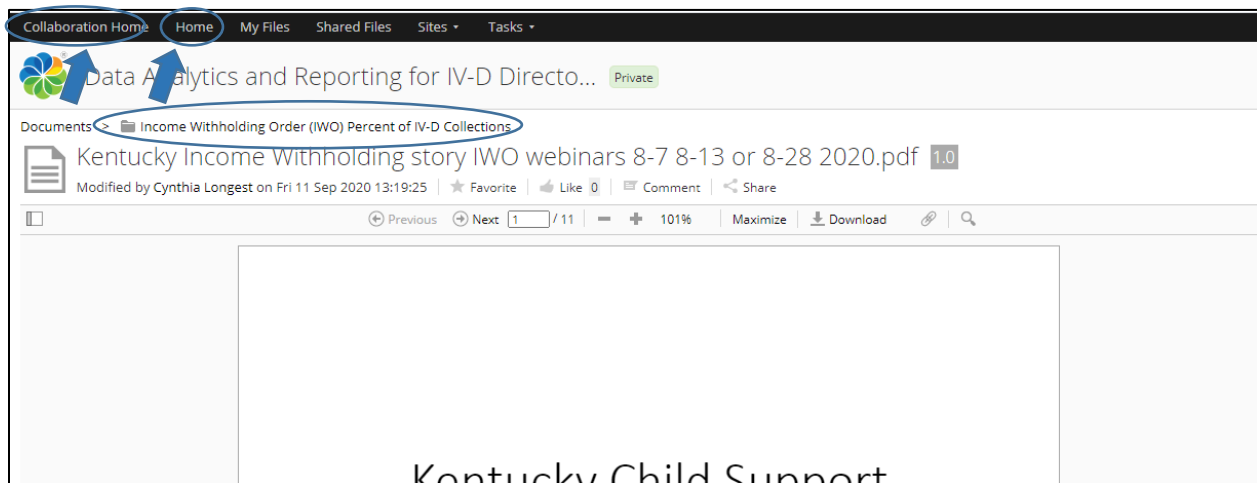
Tip 1: Tableau Reader files will always have the "twbx" extension. They tend to be relatively large so they may take longer to download. The IWO Tableau file seen on page 15 is 11 MB.

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

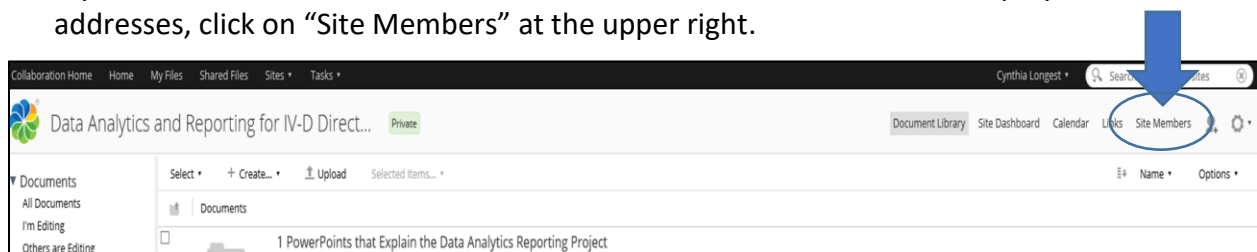
7.1 Navigating Back:

- 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.

