

CREATING ADDRESS BOOKS AND USER GROUPS - OVERVIEW

Estimated time to complete: 15 minutes

In this lesson, you will be working from the **MY HOME** tab to:

- ▶ Add WFDSS users to your address book, and
- ▶ Create a group in your address book that you can eventually use to transfer incident ownership.

SETTING UP YOUR PERSONAL ADDRESS BOOK

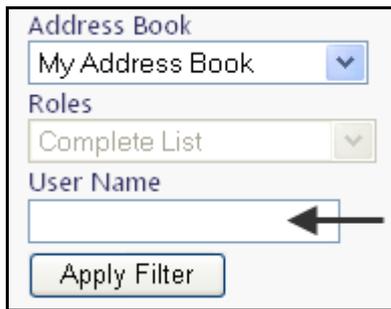
The WFDSS address book contains the names of all users in the system. My Address book is your personal address book, which you can customize and add users to at any time. You can select users from the WFDSS Address book to add to your personal address book so that you can easily find the people you work with the most. You can create groups from the WFDSS Address book or your personal address book, but you manage user groups in your personal address book.

Identify the WFDSS users that you work with, and whose names you would like to add to your personal address book. You will eventually create a group that you will transfer ownership of your training incident to, so be sure to add at least one user to your address book that you want to participate in your exercise.

To set up your personal address book:

- 1) In WFDSS, go to **MY HOME > ADDRESS BOOK**. The Address Book page opens.
- 2) Use the filter to locate the names of users you want to add to your address book, and then mark the checkbox beside each name. Select yourself, too.
- 3) Click **Add to My Contacts**. The selected users are saved to your address book.
- 4) To view the contents of your address book, select My Address Book from the Address Book drop-down list. The User List changes to show the users in your address book.

Note: When viewing your address book, make sure that the User Name field is empty. Otherwise, only the user names in your address book that satisfy the filter criteria will show.



The screenshot shows a filter interface for an address book. It includes a dropdown menu for 'Address Book' (currently set to 'My Address Book'), a dropdown menu for 'Roles' (currently set to 'Complete List'), and a text input field for 'User Name'. A black arrow points to the 'User Name' field, indicating it should be empty. Below these fields is an 'Apply Filter' button.

LESSON 3 - CREATING A GROUP

A user group is a group of WFDSS users that you create by selecting users from either the WFDSS Address book or My Address book. Once a group has been created, it is saved to your personal address book where you can manage it and make edits. Groups make it easier for you to find the people you work with regularly, and enable you to assign incident ownership to a team of individuals. Assigning multiple owners to an incident ensures that progress is made on incident analysis and reporting, even if an individual becomes unavailable.

You can create a group by selecting individuals from the WFDSS Address book, but it's easier to create a group in your personal address book because you will be searching through a smaller cohort. Once created, you can change the name of a group at any time.

Only group members with Author privileges can own incidents. Members of a group that do not have author privileges can assist with document editing, review, and approval.

In this exercise, you will create a group in your personal address book that will include any users you might want to participate in your training exercise. Since this is a training incident, you can include whomever you'd like in the group and its members do not need to participate. You can create a group with one user, yourself, if you choose.

To create a group:

- 1) In WFDSS, choose **MY HOME PAGE > ADDRESS BOOK**.
- 2) Select the WFDSS Address Book or My Address Book from the Address Book drop-down menu. Use the other filters as needed to narrow your search (see Filtering Addresses).
- 3) Type in a user's full, first or last name in the User Name box. Click **Apply Filter**.
- 4) Check the box next to the User Name(s) you wish to add to your group. Repeat for multiple users. At least one group member must have Author privileges.
- 5) Click **Create Group**. The Edit Group page appears. A system-generated Group Name appears in the textbox.
- 6) Create the Group Name by doing one of the following:
 - ▶ Click **Save Name** to create a Group Name using the system-generated Group Name, OR
 - ▶ Type a new Group Name into the textbox, and then click **Save Name**.

- 7) When you are finished, click **Return**. The Address Book page reappears. The group is saved to the User Name list (in alphabetical order) in My Address Book. You can navigate there to view it if you choose.

Note: If your user list is multiple pages, the group appears on the page that displays that letter of the alphabet. A group icon appears below the group name, which displays as a hyperlink (see example).



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- ▶ Setting Up Your Personal Address Book
- ▶ Creating a Group
- ▶ Editing A Group