

# **Technical Support Site**

## **User Guide**

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12 September 2008

# REVISION HISTORY

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# TABLE OF CONTENTS

<b>REVISION HISTORY .....</b>	<b>ii</b>
<b>1. INTRODUCTION.....</b>	<b>1-1</b>
1.1. Definitions.....	1-1
1.1.1. Customers.....	1-1
1.1.2. Members.....	1-1
1.1.3. Site Owners .....	1-1
1.1.4. Administrators.....	1-1
1.1.5. Thread.....	1-1
1.1.6. Post .....	1-1
1.1.7. Comment .....	1-2
<b>2. SOFTWARE REQUIREMENTS .....</b>	<b>2-1</b>
2.1. Browser Requirements .....	2-1
2.1.1. Internet Explorer .....	2-1
2.2. Office Requirements .....	2-1
2.2.1. Microsoft Office 2007.....	2-1
2.2.2. Microsoft Office 2000-2003.....	2-1
<b>3. USER INTERFACE EXPLAINED .....</b>	<b>3-1</b>
<b>4. LOGIN AND LOGOUT PROCEDURES.....</b>	<b>4-1</b>
4.1. Site URL.....	4-1
4.2. Login .....	4-1
4.3. Add Site to Trusted Sites.....	4-2
4.4. Logout .....	4-3
<b>5. DOCUMENT LIBRARIES .....</b>	<b>5-1</b>
5.1. General Introduction .....	5-1
5.2. Guidelines.....	5-1
5.3. Locating Document Libraries.....	5-1
5.4. Viewing Document Library Content.....	5-1
<b>6. DISCUSSION BOARDS .....</b>	<b>6-1</b>
6.1. General Introduction .....	6-1
6.2. Guidelines.....	6-1
6.3. How to Create a Discussion Thread.....	6-1
6.4. How to Create a Reply .....	6-2

- 7. BLOGS.....7-1**
  - 7.1. General Introduction ..... 7-1
  - 7.2. Guidelines..... 7-1
  - 7.3. How to Create a Post..... 7-1
  - 7.4. How to Comment On a Post..... 7-2
  
- 8. ALERTS AND RSS FEEDS .....8-1**
  - 8.1. Definitions ..... 8-1
    - 8.1.1. Alerts ..... 8-1
    - 8.1.2. RSS Feeds ..... 8-1
  - 8.2. Guidelines..... 8-1
  - 8.3. How to Create an Alert..... 8-1
  - 8.4. How to Create an RSS Feed..... 8-3

# 1. INTRODUCTION

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The Econolite Technical Support site provides a host of features designed to enable better communication between Econolite customers and our technical support team. Through the use of Microsoft Sharepoint technologies, this new support portal will be used to distribute documents, maintain discussions for each of our product lines, and allow for a content-rich environment that will strengthen the customer-support reputation that Econolite is known for.

## 1.1. Definitions

### 1.1.1. *Customers*

Customers are non-Econolite personnel who use Econolite products or are assigned to maintain Econolite products through their businesses. Authorized customers are provided with an account logon for the Support site that can only be used for this purpose. Customers will be able to interact with Econolite support staff and sales members to discuss or resolve issues related to Econolite products or services.

### 1.1.2. *Members*

Members of the technical support site are typically Econolite personnel and Distributors authorized to use the site. Support staff, technicians, engineers, sales members, and other internal resources will be able to interact with customers directly through the Sharepoint site and address issues or concerns that are posted on the site.

### 1.1.3. *Site Owners*

Each product line available in the Technical Support site is overseen by a select group of site owners that are responsible for maintaining site discussions, documents, blog posts and comments, and general-purpose use. Site Owners only have authority within their own product lines.

### 1.1.4. *Administrators*

Though the Technical Support site will be maintained by Site Owners, a small group of Econolite personnel have been selected as Administrators to provide additional levels of support should it be needed. Administrators have been authorized to perform any duty in regards to site control.

### 1.1.5. *Thread*

In reference to Discussion Boards, a threaded discussion is an electronic discussion in which Sharepoint aids the user by visually grouping messages. Messages are usually grouped visually in a hierarchy by topic. A set of messages grouped in this way is called a topic thread or simply "thread". Refer to Chapter 6 for more information.

### 1.1.6. *Post*

In reference to Blogs, a Post is an initial item being published to a Blog site. Refer to Chapter 7 for more information.

### *1.1.7. Comment*

In reference to Blogs, a Comment is a reply to a Post that has been published on a Blog site. Please see Chapter 7 for more information.

## 2. SOFTWARE REQUIREMENTS

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### 2.1. Browser Requirements

#### 2.1.1. *Internet Explorer*

Microsoft Sharepoint 2007 products have been designed to work with Internet Explorer 6.0 and above. The use of other browsers is not recommended and may not provide all of the functionality needed to successfully use Sharepoint technologies.

### 2.2. Office Requirements

#### 2.2.1. *Microsoft Office 2007*

Microsoft Office 2007 is required to edit Office documents **directly** in a Sharepoint 2007 Document Library. Office 2007 security settings must also be configured on a per-software basis. Thus, both Excel and Word will need to be individually configured to allow this type of functionality.

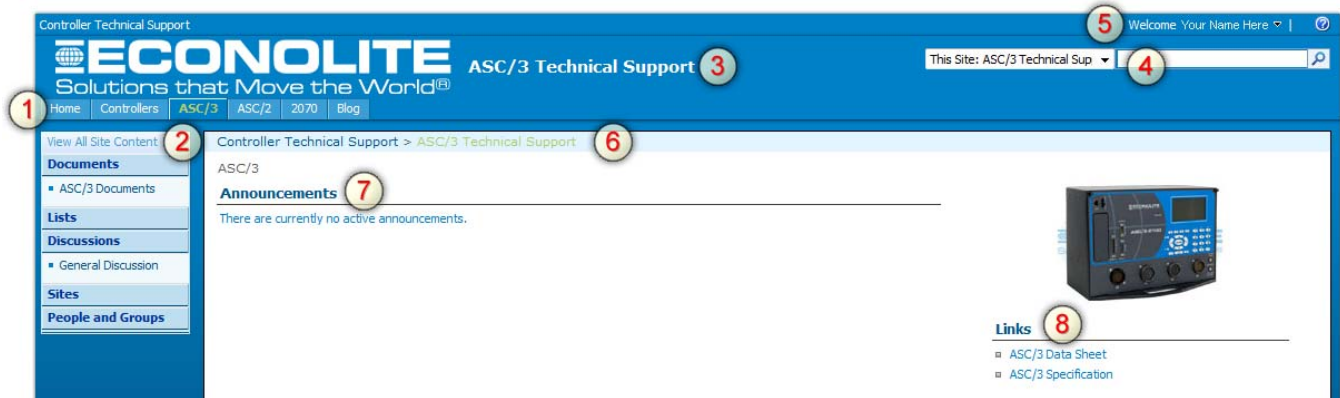
#### 2.2.2. *Microsoft Office 2000-2003*

Microsoft Office 2000-2003 can be used to read Office documents saved in a Document Library. The document format must be compatible with your version of Office and most, if not all, documents posted to the Sharepoint sites should be available to Office 2000 or higher. Documents can be edited locally once they have been downloaded from the Sharepoint site.





## 3. USER INTERFACE EXPLAINED



### 1. Site Navigation Menu Tabs

These tabs provide easy access to all category and category products.

### 2. Site Content Sub-Navigation

The Site Content box shown on the left contains links to the document library and product discussion boards available to the user.

### 3. Site Category Title

This title description provides information about which section a user is currently viewing.

### 4. Site Search

The search feature can be used to search for all content within the category and all subsequent sub-categories. Search results will be displayed in the standard results layout.

### 5. Logon Name

The user information “Welcome” bar indicates the First and Last Name of the user currently logged in. Additional user features are located here and may or may not be enabled.

### 6. Navigation Breadcrumb

When available, the site navigation breadcrumb shows the site path currently navigated. This provides quick access to all site levels above the current location.

### 7. Announcements

Announcements are published by site administrators on a periodic basis. New announcements will be displayed here until the expiration date is reached. Past announcements can be viewed by clicking on “Announcements”.

### 8. Links

Links are published by site administrators on a periodic basis to enable quick access to other websites pertaining to the current category or product being viewed.



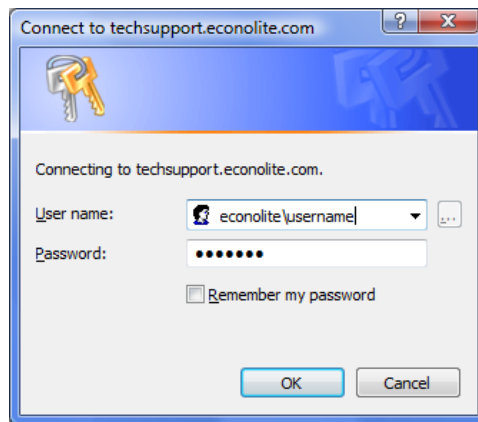
## 4. LOGIN AND LOGOUT PROCEDURES

### 4.1. Site URL

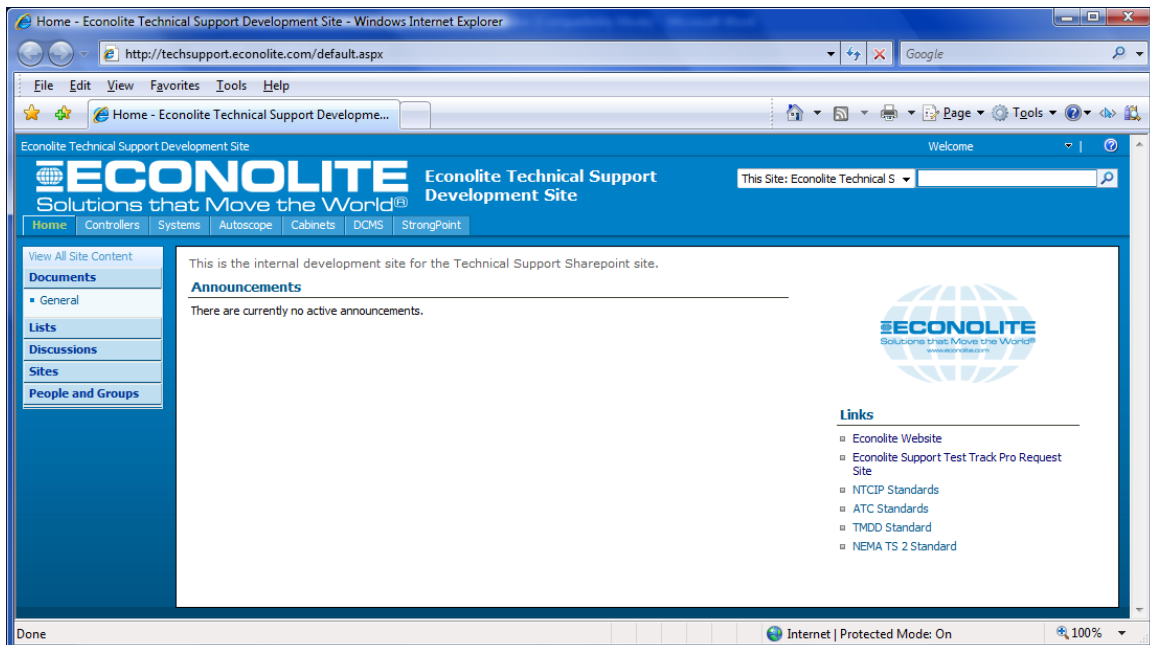
The Technical Support site is accessible by entering <http://techsupport.econolite.com> into the address bar of Internet Explorer, or by clicking on the link in this sentence.

### 4.2. Login

Access to the site is restricted through the use of Windows Authentication on the Econolite Domain. Use the account information provided to you as shown below, swapping out “username” with your username.



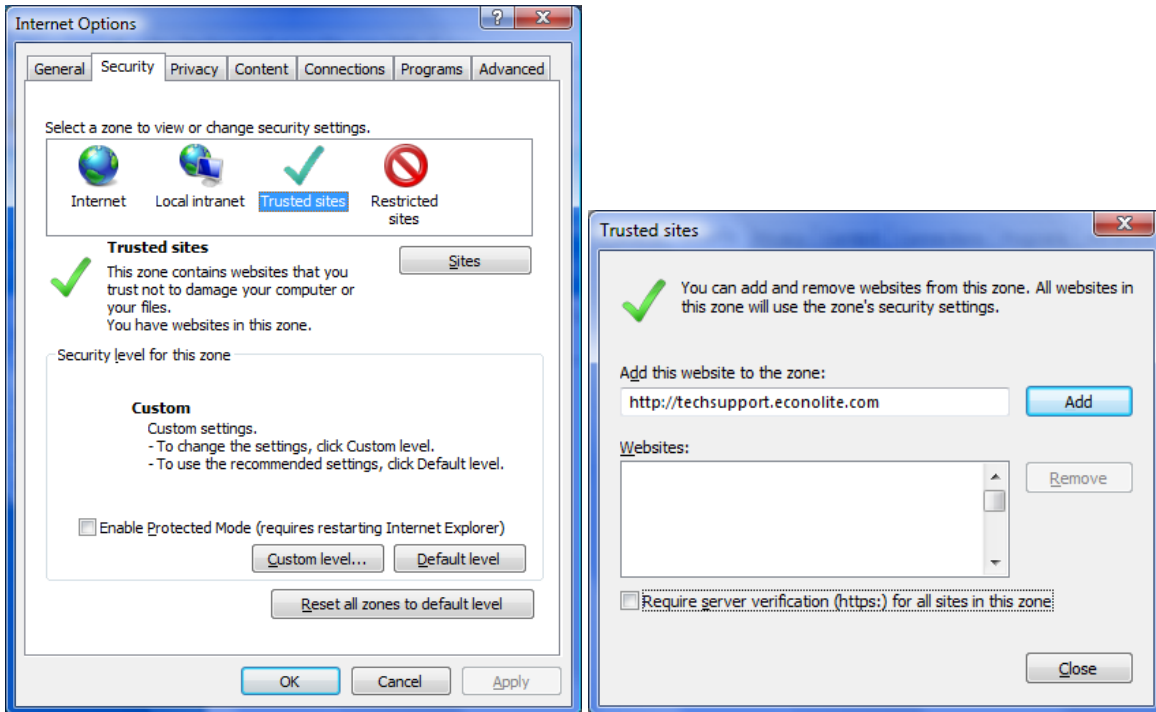
The Technical Support homepage is shown here.



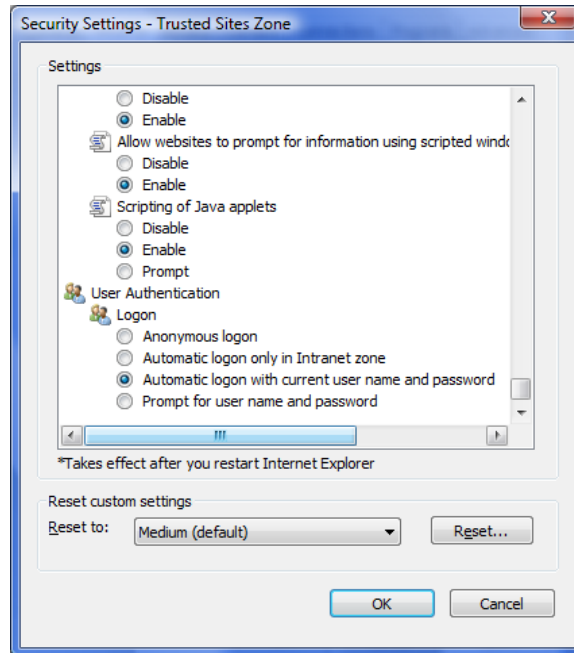
### 4.3. Add Site to Trusted Sites

To bypass the Windows Login dialog window, <http://techsupport.econolite.com> must be added to your browsers' Trusted Sites and have the appropriate settings configured for authentication.

1. In Internet Explorer, navigate to **Tools > Internet Options**.
2. In the Internet Options window, click on the **Security** tab and select the **Trusted sites** icon. Then click **[Sites]**.



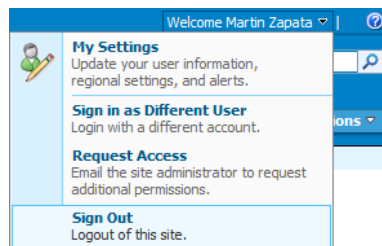
3. In the Trusted Sites window, make sure that the **Require server verification (https:) for all sites in this zone** is not checked. The URL should automatically show in the **Add this website to the zone:** field. If not, please enter the full web address, as shown above. Click **[Add]** when finished.
4. In the Internet Options window, click **[Custom level...]** to adjust the settings for the Trusted Sites.



5. In the Security Settings – Trusted Sites Zone windows, scroll to the bottom of the list until you locate the **User Authentication – Logon** settings.
  - For Econolite users who will access the site using Econolite provided computers, check the **Automatic logon with current user name and password** option. This will use the login information that you used to log into your computer.
  - For all other users, check the Prompt for user name and password option. You will be prompted for your login information for every time you connect to the website.
6. Click **[OK]** to close the **Security Settings – Trusted Sites Zone** window.
7. Click **[OK]** to close the **Internet Options** window.

#### 4.4. Logout

8. To log out of the website, simply close your browser window. Alternately, you can open the pull-down menu from the **Welcome Username** menu and choose the **Sign Out** option.





## 5. DOCUMENT LIBRARIES

### 5.1. General Introduction

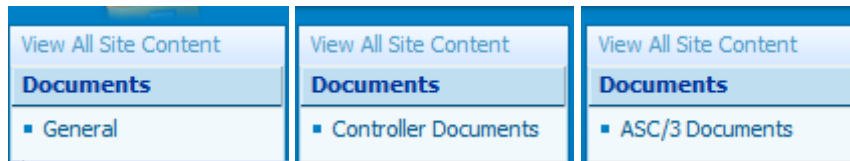
Document Libraries contain the released versions of documents, manuals, training material and other miscellaneous files that are available to our registered users. Each site category and sub-category contains its own document library for better organization. Of course, all contents can be located by using the Search feature.

### 5.2. Guidelines

- Econolite customers will have read-only access to documents posted to any of the technical support areas.
- Technical Support members have the ability to upload documents to any Document Library to serve the purposes of support. Local site administrators have authority to remove documents if necessary.
- For a list of blocked file types, please contact your local site administrator.

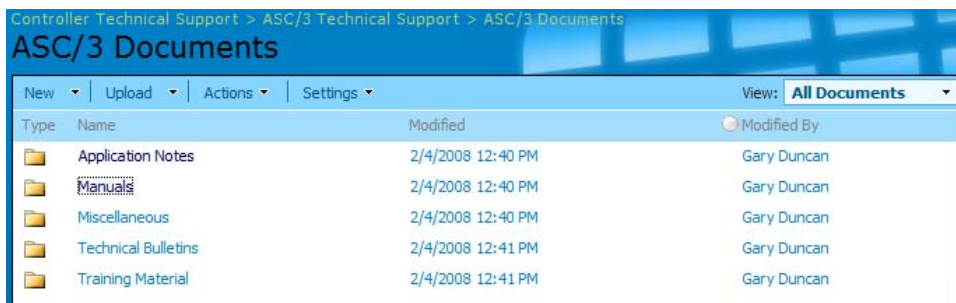
### 5.3. Locating Document Libraries

Document Library links are displayed in the left navigation box under **Documents**. The Library name reflects the Category you are currently viewing.



### 5.4. Viewing Document Library Content

By clicking on the appropriate link, the library contents are displayed in the main content area.







## 6. DISCUSSION BOARDS

### 6.1. General Introduction

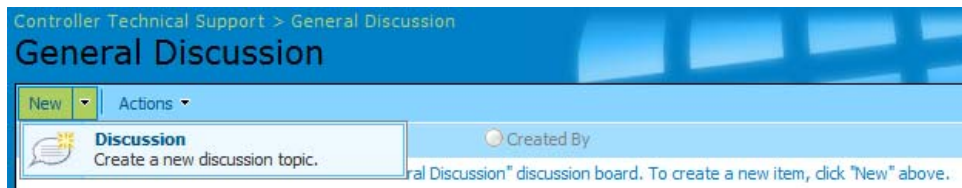
Discussion Boards provide a method for Econolite customers to interact with Econolite technical support engineers and other support personnel by providing user-generated content that can be searched and indexed by all users. Each site Category and product has its own General Discussion Board that will contain discussions directly related to the category or product section being accessed.

### 6.2. Guidelines

Discussion threads can be created by any user of the Technical Support website. Threads should be related to the category or product being discussed.

### 6.3. How to Create a Discussion Thread

1. Navigate to the Discussion Board where you wish to create a discussion thread.
2. Click **New > Discussion**.



3. Fill out the **Subject** and **Body** fields appropriately and Click **[OK]**. The Subject should give a specific description of the Discussion topic.

Your Discussion Thread will now be displayed in the main content area. The default view will display the thread subject, who created the thread, how many replies the thread has received, and when the thread was last updated.

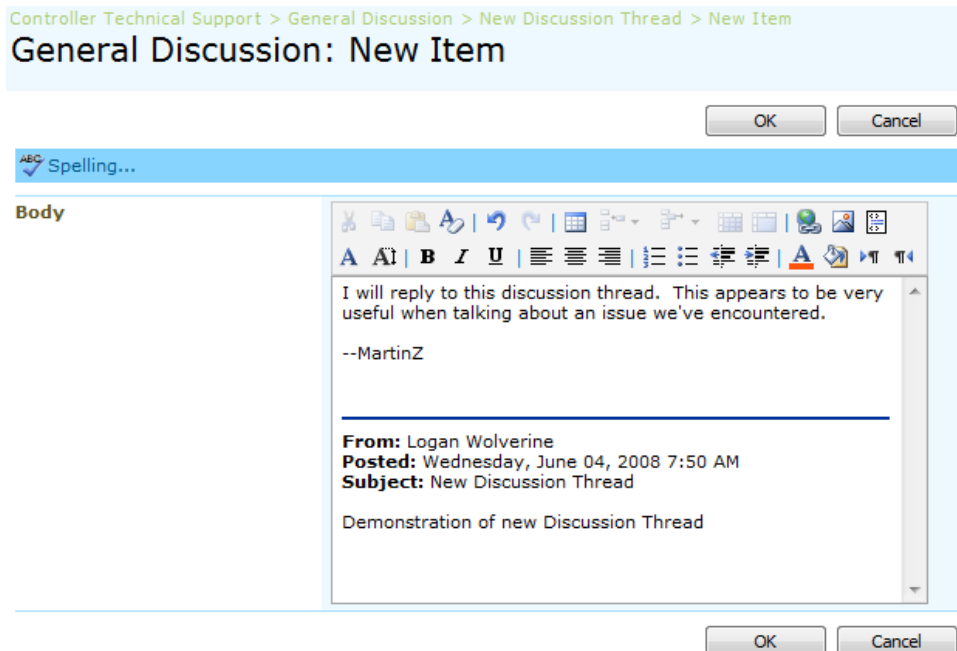


### 6.4. How to Create a Reply

1. Click on the new thread to view the contents.



2. Click on the **Reply** link on the right side of the layout. Click **[OK]** when finished.



Your Reply will now be displayed under the initial Discussion Thread.


Controller Technical Support > General Discussion > New Discussion Thread

### General Discussion

Actions ▾ View: Flat ▾

Posted By Post


Started: 6/4/2008 7:50 AM View Properties | Reply

  
Logan Wolverine

**New Discussion Thread**  
Demonstration of new Discussion Thread

---

Posted: 6/4/2008 8:08 AM View Properties | Reply

  
Martin Zapata

I will reply to this discussion thread. This appears to be very useful when talking about an issue we've encountered.

--MartinZ

Show Quoted Messages

In the main General Discussion thread listing, the thread now indicates a reply. Additionally, the **Last Updated** date and time are updated to reflect the latest changes.

Controller Technical Support > General Discussion

### General Discussion

New ▾ Actions ▾ View: Subject ▾

Subject	Created By	Replies	Last Updated
New Discussion Thread <span style="color: green;">NEW</span>	Your Name Here	1	6/4/2008 8:09 AM



## 7. BLOGS

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### 7.1. General Introduction

Blogs provide a method for Econolite Members to write about a wide range of topics related to a specific category or product. These blogs may provide commentary or news on a particular subject or product application. Customers will be able to respond to any post created by Members.

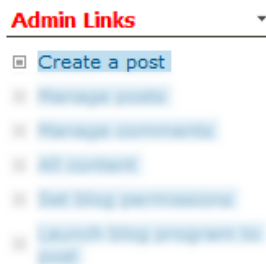
### 7.2. Guidelines

- The creation of blog entries is limited to Econolite Members authorized to create Blogs. Members may also respond to and published Blog Post.
- Customers will have permission to read and respond to any published Blog Post.
- All Posts and Comments must be approved by site owners or administrators before being published.

### 7.3. How to Create a Post

Econolite Members have permission to create a blog post. If you are a customer, please skip down to 7.4. The **Admin Links** menu will appear on the main Blog page if you have permission to Post.

1. Click on the **Create a post** link.



2. Fill out the **Title** and **Body** fields of the **New Item** window.

Controller Technical Support > Econolite Controller Blog > Posts > New Item

Posts: New Item

Items on this list require content approval. Your submission will not appear in public views until approved by someone with proper rights. More information on content approval.

Save As Draft Cancel

\* indicates a required field

Title \* This is a Blog Demonstration

Body

This blog topic has been created for demonstration purposes. It must be authorized by site administrators.

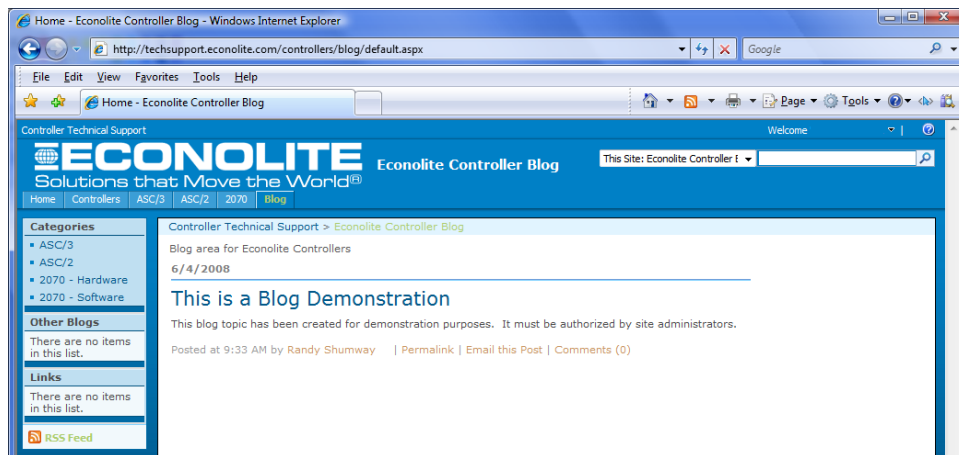
Category (None)

Published \* 6/4/2008 9 AM 28

Save As Draft Cancel

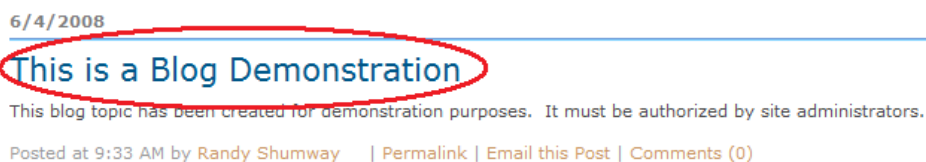
3. When finished, click **[Save As Draft]**. The Post will appear on the site after it has been approved by site administrators.

Once the Post has been approved, it will appear in the main content area.



## 7.4. How to Comment On a Post

1. Click on the Post Title, as circled here.



2. Under the Comments sections, fill out the **Body** field. Optionally, you can provide your own **Title** for your comment.

6/4/2008

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## This is a Blog Demonstration

This blog topic has been created for demonstration purposes. It must be authorized by site administrators.

Posted at 9:33 AM by [Randy Shumway](#) | [Permalink](#) | [Email this Post](#) | [Comments \(0\)](#)

### Comments

There are no comments yet for this post.

 Items on this list require content approval. Your submission will not appear in public views until approved by someone with proper rights. [More information on content approval.](#)

<b>Title</b>	<input type="text"/>
<b>Body *</b>	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>

3. When finished, click [**Submit Comment**].

After your Comment has been approved by site administrators, it will appear below the Post. New Comments are displayed at the bottom of the comment section.

[Controller Technical Support](#) > [Econolite Controller Blog](#) > [Posts](#) > [This is a Blog Demonstration](#)

6/4/2008

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## This is a Blog Demonstration

This blog topic has been created for demonstration purposes. It must be authorized by site administrators.

Posted at 9:33 AM by [Randy Shumway](#) | [Permalink](#) | [Email this Post](#) | [Comments \(2\)](#)

### Comments

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**Response to Blog Demonstration**

Randy,

Here is my reply to your demonstration.

[Mark Zinn](#) at 6/4/2008 9:47 AM





## 8. ALERTS AND RSS FEEDS

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### 8.1. Definitions

#### 8.1.1. Alerts

Alerts provide a method to notify users of a document change or deletion automatically. Site users can manually place an alert on most items or lists within the Sharepoint site. If the Alert option does not appear, it may not be available.

#### 8.1.2. RSS Feeds

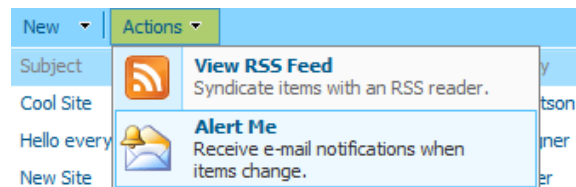
RSS Feeds provide a method to connect their own Outlook clients or RSS Readers with discussion-oriented lists on the support site.

### 8.2. Guidelines

- Any user of the Technical Support site is authorized to create and manage Alerts and RSS Feeds for themselves.
- Alerts and RSS Feeds are generally available to most sections of the site. These features may be disabled for certain areas or documents if necessary.

### 8.3. How to Create an Alert

1. Navigate to a file or folder location where you would like to add an Alert.
2. Choose **Actions > Alert Me** from the navigation menu.



3. Configure the Alert Settings. Confirm that your E-mail address is correct. Click **[OK]**.

Econolite Technical Support Site > General Site Discussion > New Alert

### New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.

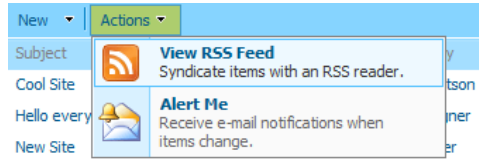
[View my existing alerts on this site.](#)

<b>Alert Title</b> Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.	<input type="text" value="General Site Discussion"/>
<b>Send Alerts To</b> This alert will be sent to the e-mail address indicated.	E-mail address: <b>username@domain</b>
<b>Change Type</b> Specify the type of changes that you want to be alerted to.	Only send me alerts when: <input checked="" type="radio"/> All changes <input type="radio"/> New items are added <input type="radio"/> Existing items are modified <input type="radio"/> Items are deleted
<b>Send Alerts for These Changes</b> Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.	Send me an alert when: <input checked="" type="radio"/> Anything changes <input type="radio"/> Someone else changes a post <input type="radio"/> Someone else changes a post created by me <input type="radio"/> Someone else changes a post last modified by me
<b>When to Send Alerts</b> Specify how frequently you want to be alerted.	<input checked="" type="radio"/> Send e-mail immediately <input type="radio"/> Send a daily summary <input type="radio"/> Send a weekly summary Time: <input type="text" value="Monday"/> <input type="text" value="8:00 AM"/>

The Alert will be created once you click **[OK]**. Any changes to the site that match the criteria for your alert will cause the system to notify you via email to the address associated with your account. If you think an Alert is not working properly, please contact your Econolite Account Representative.

## 8.4. How to Create an RSS Feed


1. Navigate to a file or folder location that you would like to subscribe to.
2. Choose **Actions > View RSS Feed** from the navigation menu.



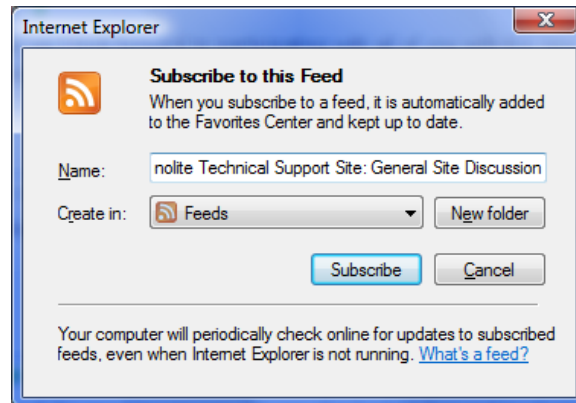
3. Click on **Subscribe to this feed**, as shown here.

### Econolite Technical Support Site: General Site Discussion

**You are viewing a feed that contains frequently updated content.** When you subscribe to a feed, it is added to the Common Feed List. Updated information from the feed is automatically downloaded to your computer and can be viewed in Internet Explorer and other programs. [Learn more about feeds.](#)

 [Subscribe to this feed](#)


4. Finalize your RSS Feed options and click **[Subscribe]**. This requires you to have software on your system available to read RSS feeds. The Option window for your browser may differ from the image shown here.



5. If successful, a notice will appear indicating that you have subscribed to the RSS feed. You can reconnect to the site using any of the links displayed on the page.

### You've successfully subscribed to this feed!

Updated content can be viewed in Internet Explorer and other programs that use the Common Feed List.

 [View my feeds](#)