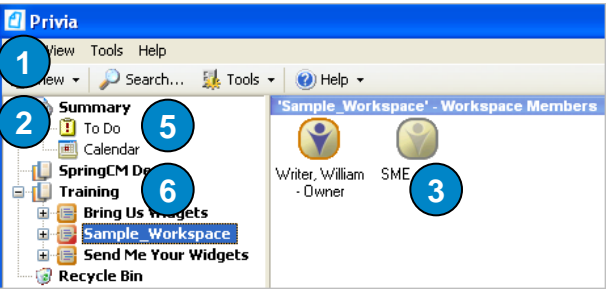


Privia Contributor Quick Reference (Platform Client)

NOTE: The instructions in this quick reference apply to the Privia Platform Client. For instructions on performing the same tasks in the Privia Web Client, refer to the *Privia Contributor Quick Reference (Web Client)*.

Navigational Overview

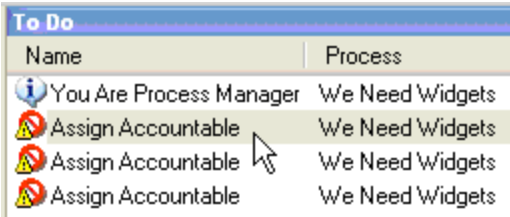


- 1 **Privia Toolbar:** Access Personas, Skins, User Settings, and Help
- 2 **Navigation Pane:** Allows you to switch between the various functional areas in Privia.
- 3 **Main Content Pane:** Area where main content in the context of the functional component is displayed.
- 4 **Home:** The main landing page after login to Privia Web Client. Here you can see a Dashboard summarizing activities.


- 5 **To Do:** Displays the list of tasks that are part of a process ("activities") and system-generated alerts that are assigned to you.
- 6 **Workspaces:** A Workspace is an online environment where team members can publish and share documents, communicate and collaborate. Whenever an opportunity is created in Privia, an associated Workspace is automatically created where documents can be stored and shared.
- 7 **Notifications:** View messages received from other users.


Alerts

When you log in, any active alerts will appear under **To Do**.



Double-click an alert to display it. Alerts are typically informational, letting you know that an activity is in progress that you may be involved in.

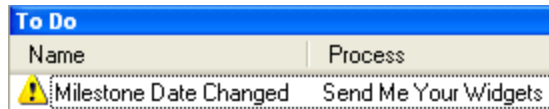
For an **Informational** alert , click **Dismiss** to acknowledge it.

For an **Assign Accountable** alert , you must click **Assign**, select a **User Name**, and then click **OK** to clear the alert.

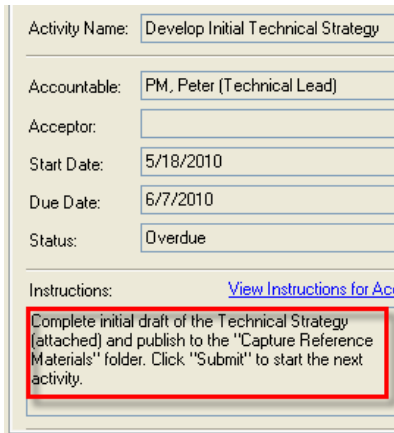
Activities

Activities are steps in the process of completing a proposal-related effort. Activities are assigned to team members. For example, a Proposal Manager might assign you an activity to write a section of a proposal.

1. Activities that are **In Progress** are displayed under **To Do**.



2. Click the Activity Name to open the activity.
3. A screen opens showing details of the activity.
4. Read the **Instructions** section to know exactly what to do.

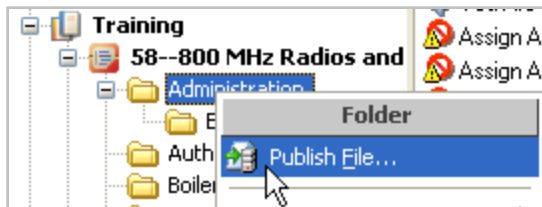


5. Complete the activity. This may involve performing other tasks in Privia, such as uploading a document or adding comments during a review.
6. When the activity is completed, click **Submit**. It will no longer appear in your activities list.

Privia Contributor Quick Reference (Platform Client)

Uploading New Documents

1. Right-click the folder where you want to publish the file.
2. Click **Publish File**.




3. Browse to the document and select it.
4. Click **Open**.
5. (Optional) Set file permissions and/or set up a notification for the file.
6. Click **OK**.

Document Permissions

1. Right-click the file.
2. Select **Properties**.
3. Click the **Permissions** tab.
4. Select a permissions level:
 - **All members can View and Edit:** The lower area is grayed out and all members of the workspace can view and edit the document.
 - **All members can View, specific members can Edit** (default): In the lower area of the **Permissions** tab you can check **Edit** next to any of the users to allow them to make changes to the file.
 - **Specific members can View or Edit:** You have the option of checking both the **View** and **Edit** checkboxes for each workspace member listed. By default, users added to the workspace will be unable to view/edit files; the owner of the document must go through the member list to give members view/edit rights.

Editing Documents

Editing a document is the process of checking it out, modifying it, and then checking it back in. When you check out a document no one else can modify it. When you check a document back in, other users can edit it again. While a document is checked out, a small red lock appears over the document icon.  To check out a document:

1. Right-click the file.
2. Select **Edit**.
3. The **Lock the file and edit it option** should be selected. Click **OK**.

To check in a document:

1. Right-click the file.
2. Select **Edit**.
3. Select one of the following options:
 - **Upload existing document and unlock the file:** Once you are done with your edits, you can select this option to check in your changes.
 - **Undo editing changes and cancel lock:** Erases any changes and checks it back in.
4. Click **OK**.

Version Control

Version Control means you can access the Privia server and go back to previous versions of the document.


To review previous versions of a document:

1. Right-click the document.
2. Select **Properties**.
3. Click the **Versions** tab. This lists all of the versions of the document. If you expand the dialog's size to the right, you can see comments for each version.
4. To view a read-only version of a previous version, select it and click the **View** button. You can edit a previous version of a document by saving it as another file.

Notifications

To send a notification about a document:

1. Right-click the document and select **Notify**.
2. Click the **To** button.
3. Select recipients.
4. (Optional) Edit the subject and message.
5. (Optional) Select other notification formats (**Email** or **Cell**).
6. Click **Send**.

If you have notifications to view, the Privia your notifications, click the Privia Platform Client icon in your Windows toolbar will show an envelope.  If you hover your mouse over the icon, a pop-up dialog will be displayed next to the icon showing notifications.

Comments

Global comments are general comments about the entire document. Inline comments are about a block of text in a document.

To create a new comment:

Right-click the document and select **Comments**.

- To enter an inline comment, select text in the upper window, enter your comment in the lower window, and then click the **New Inline Comment** button.
- To enter a global comment, enter your comment in the lower window and then click the **New Global Comment** button.

To reply to an existing comment:

1. Right-click a comment.
2. Select **Reply**.
3. Enter your reply comment.
4. Click **Add**.