

# OnSemble

# Portal Suite Guide

## User Birthday Island



## PASSAGEWAYS

8 North 3<sup>rd</sup> Street, Suite 101 Lafayette, IN 47901  
765.535.1880

Email Customer Success: [ospros@passageways.com](mailto:ospros@passageways.com)

Email Tech Support: [support@passageways.com](mailto:support@passageways.com)

<http://support.passageways.com>

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## Introduction

This Guide is one of many “mini-Guides” designed to explain all about the functionality of each of the Islands found in OnSemble Begin.

## How to Use This Guide

We strongly suggest that this Guide be used in conjunction our Workgroup Configuration Guide, the Workgroup Content Guide and with the help of your Portal Administrator (and he or she should be armed with the Portal Administrator’s Guide!)

We have included a small Glossary of terms specific to this Guide. The Workgroup Manager Guides also have very useful Glossaries and set of FAQ that you may wish to review before using this Guide.

Throughout this Guide, we may call out Important Notes with the following symbols:

**! Critical Note** – These are very important and often involve security issues.

**💡 Side Note** – These are points of information designed to clarify a larger topic.

**★ OS Pro Note** – Best practices, ‘outside-the-box’ thinking and fun facts from our Customer Success Team.

**🧩 Example Time** – Actual examples we run across in our day-to-day.

## Navigation Note:

Your Portal has two types of Navigation available, ‘Horizontal’ (with drop down menus, across the top) and ‘Vertical’ (in a collapsible sidebar on the left of your screen). Your Portal Administrator will determine which Navigation type is available to you. This guide shows primarily Vertical Navigation for screen caps, but may show both Vertical Navigation and Horizontal Navigation where space allows. We will also note where there are distinct differences. Almost all tasks can be performed with either type of Navigation.

**! Critical Note:** This Guide is written from the perspective of a Workgroup Manager. If you are an Assistant Manager, you might not be able to perform ALL the actions listed here, and we have tried to note the differences. If you happen to be a Portal Administrator using this Guide, remember, you may have to “add yourself” as a Workgroup Manager or Assistant Manager to perform some of these actions!

**★ OS Pro Note:** Do you have feedback on this Guide? Do you want to share great ideas for F.A.Q., Glossary terms – or even another Guide we need? We would love to include your thoughts in our next Guide Update! Reach out to your Customer Success Manager and share your thoughts!

## FAQ

**Q: I added an Assistant Manager, but they still cannot edit my Workgroup Pages.**

**A:** It's likely one of two things. First, check permissions. After adding an Assistant Manager, you must then set the permissions for that Assistant Manager. See the Workgroup Configuration Guide for more details. Second, make sure he or she is working with the actual Workgroup Page and not a "Public Page." Public Pages cannot be edited – you must work with the native Page.

**Q: How do you resize Islands on a page?**

**A:** We cover both placing Islands and resizing Islands in depth in the Workgroup Content Guide.

**Q: Can a Portal Administrator automatically manage all Workgroup Pages?**

**A:** No. A Portal Administrator is not a Workgroup Manager or Member automatically or by default. Portal Administrators do have the ability to grant themselves whatever permissions and access they see fit. See the Portal Administrator Guide for more details.

**Q: Why can't I create new Workgroup Pages?**

**A:** Whether or not a User is allowed to create his or her own Workgroup Pages is controlled by the Workgroup Manager and Assistant Managers. Please contact your them for more details.

## User Birthday Island Mini-Glossary

**Information Only Island** – These are Islands that only display information. Once placed, the Content inside the Island cannot be edited, though it may be "clickable."

**Variable Content Island** – These are Islands which will change size (typically length) depending on the User who is logged in and/or another User(s) activity or information. OnSemble "knows" who is logged in and only displays content relevant to that User, that's User's preferences, and that User's permissions.

## User Birthday Island – About

### What Does the User Birthday Island Do?

The User Birthday island is a fun way to keep track of and celebrate your teammate’s birthdays. Placing this island on the page will display any user who happens to celebrate their birthday during the range of time selected. The Birthday Island is an Information Only island.

★ **OS Pro Note:** There are many ways the User Birthday Island can be configured; read on to see what options will work best for you!

### How Does the User Birthday Island work?

The User Birthday Island pulls data from the user’s profile information. Make sure that information is correct in order for the island to display birthdays accurately.

### Choosing your Configuration

The first choice you must make is to display only the current month, or to choose a date range (forward and backward) from the current date.

#### Show Birthdays:

- In the same month as today
- Within a specified time frame from today

Number of days in the past:

Number of days in the future:

Then, you have three options to choose from:

Only show workgroup members

1

Display user profile pictures

2

Ability to sort columns

3

#### **1: Only show workgroup members.**

If this is selected, the island will only show information for **members** of the workgroup (whether added by name or by role.)

If a user is an assistant manager and NOT a member, and this box is checked, that user will not display.

**2: Display user profile pictures.** If this is selected, the island will show small “thumbnail” photos from the User Profile. Users without a photo will have a generic silhouette.

**3: Ability to sort columns:** If this option is selected, the island will be a little taller and have a bar with arrows, allowing the viewer to sort the columns alphabetically by name or reverse date order.

## User Birthday Island - Placing it on a Page


### Island Height to Content Height

The User Birthday Island is a Variable Content Island. The content inside will change in length, depending on which Users are being displayed and who has birthdays in the specified time frame.

If the Island properties are set to content height, the Island can get very long if there are several birthdays to display. Let's quickly discuss how that impacts different Page Methods:

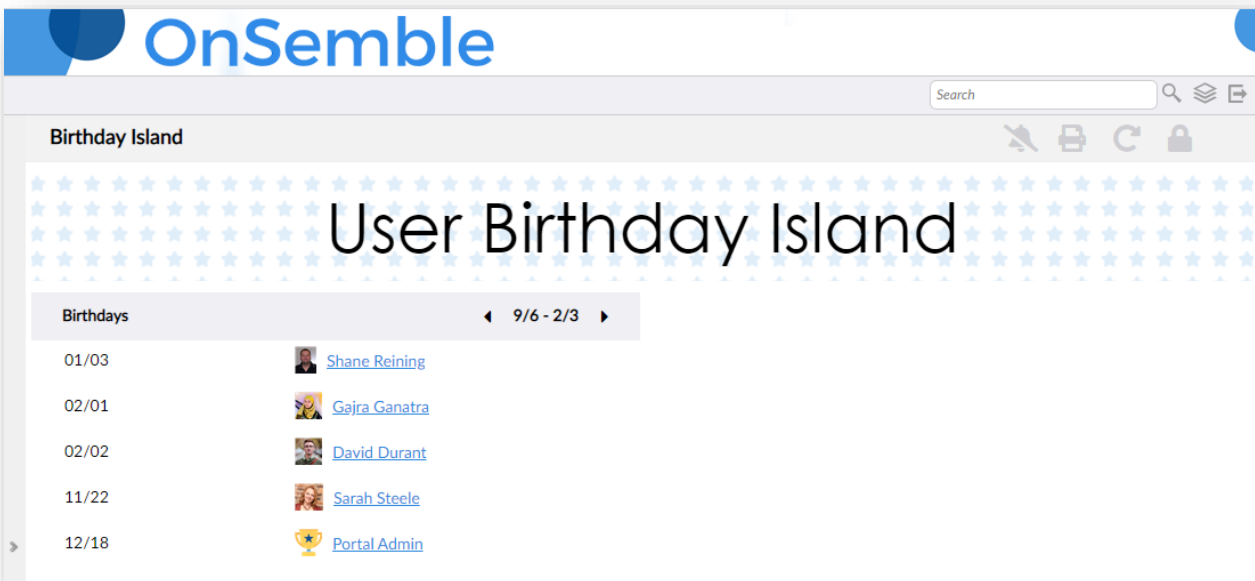
- In a Structure, this could make the Section change height.
- In Layout, this could make the Layout Column change height.
- In Freeform, the Island could “overlap” or “underlap” Islands below it.

For this reason, we suggest that if you select Content Height, you should place the User Birthday Island at the bottom of a Page to reduce negative impact.

 **Side Note:** If the Island content is wider than the Island, the content will respond and can frankly go quite small! (See the last example for details.)

### Example Time:

**User Birthday Island on the left of a 50/50 Section in a Structure.**

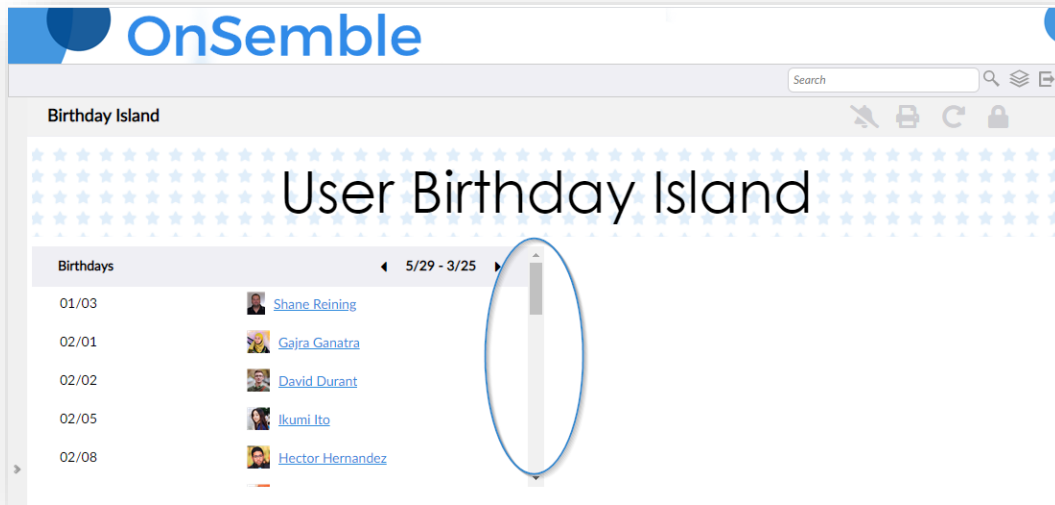


## Island Height to Fixed Height

If the Island properties are set to a specific height in pixels, and the content exceeds that length, a scroll bar will appear on the right side of the Island so you can scroll through the content. This works in all Page Methods and mitigates any issues regarding size (though the scroll bar can be unsightly).

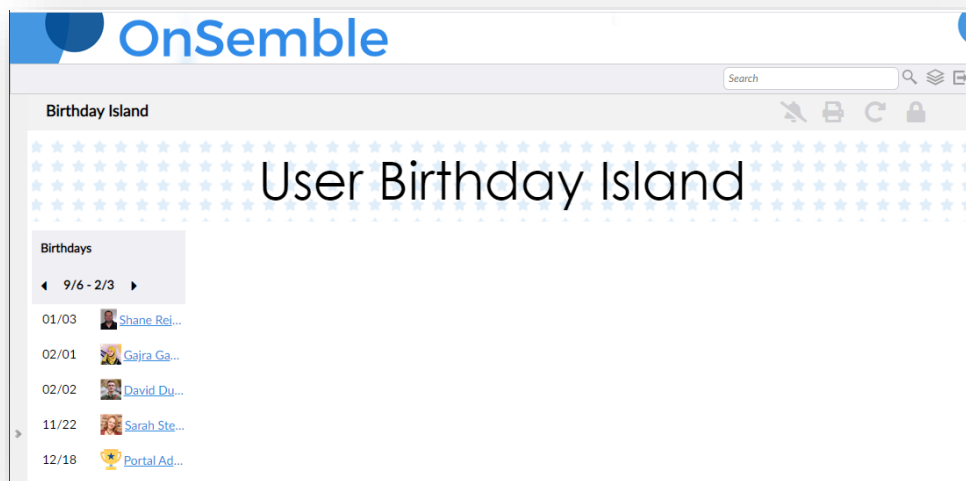
### Example Time:

User Birthday Island on the left of a 50/50 Section in a Structure and set to fixed height.



### Example Time:

User Birthday Island on the far left of a Six Section in a Structure.



**Take Note!**

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