

# Secure Portal User's Guide

## Exercise System

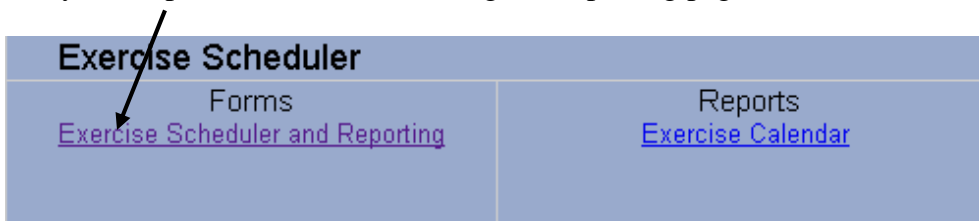
### SCHEDULING EXERCISES

ODP created the Exercise Scheduler to facilitate cooperation and collaboration and minimize conflict among Federal, State, and local agencies conducting preparedness exercises. This tool is intended to be used to track the scheduling of all exercises, regardless of the sponsoring Federal agency, in order to comprise a comprehensive calendar. This tool is also intended to be a user-friendly template for reporting on ODP-sponsored exercises.

1. To access the Exercise Scheduler click on the “Centralized Scheduling and Information System” (CSIS) link on the left side of the Portal’s homepage.



2. Click the “Exercise Scheduler and Reporting” link on the CSIS main page. This will take you to your respective State’s scheduling and reporting page.



## Initiating an Exercise

1. Be sure your State scheduling and reporting page is in the current calendar year, then click on the “Scheduling” link.

State Name	Exercises for 2004	Total Exercises Initiated	Total Exercises Scheduled	Total Exercises Completed
Alabama	8 <a href="#">Scheduling</a> <a href="#">Reporting</a>	7 (87.50%)	1 (12.50%)	0 (0.00%)

2. The scheduling link takes you to a table listing all of the exercises being conducted in your State during the selected calendar year. Click the “Add an Exercise” button to schedule a new exercise.

Exercise Name	Calendar	Exercise Status	Point of Contact	Exercise Last Modified
<a href="#">Springfield Test Tabletop</a>	<a href="#">Schedule Planning Dates</a>	Initiated	Joe Exercise Planner	2004-04-27 11:21:00 (Seidenschwarz, Jamie)

CSID Help Desk: If you have any policy related questions involving this Scheduling application, please contact the CSID Help Desk at (202) 514-8006 or toll-free at 1 800 368-6498. If you are experiencing problems using the portal, please contact the ESP Group Help Desk at (804) 744-8800 or by email at [helpdesk@espgroup.net](mailto:helpdesk@espgroup.net).

3. This Edit Exercise form asks the user for basic information regarding the exercise being scheduled. Help buttons offer a detailed description of the information required for each category. To view a category help description, click on the red question mark next to that category. When the form is complete, click the “Save Changes” button.

**Edit Exercise**

Exercise Name: Springfield Test Tabletop

Type Of Exercise: Tabletop

Scope:
 

- Local
- Multi-local
- State/Local
- Federal/State/Local
- Multi-State
- International
- Cross-Border
- Regional
- Other/Specify

 \*if "other", specify below

Scenario:
 

- Chemical release or threat
- Biological release or threat
- Radiological release or threat
- Nuclear detonation or threat
- Explosive detonation or threat
- Cyber
- Agricultural
- Other/specify

 \*if "other", specify below

Focus:
 

- Prevention
- Response
- Recovery
- other/specify

 \*if "other", specify below

Program: Chemical Stockpile Emergency Preparedness Program

Sponsor Agency: Federal

Federal: Office for Domestic Preparedness

Federal Emergency Management Agency  
Centers for Disease Control and Prevention

Funds Allocated: \$0 FY: 2004

Confirmation:  tentative  confirmed

**Exercise Location Information**

Local Jurisdiction: Springfield

State: Alabama

Federal Region:

Country: United States

Military Installation:

Year: 2004

**Exercise POC Information**

Organization:

Name: Joe Exercise Planner E-Mail: joe@springfield.al.us

Address:

Phone:

**Contractor Information (if applicable)**

Contractor Name:

Contact Name:

E-Mail:

Address:

Phone:

Save Changes Delete Cancel

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The information in this form can be accessed and edited at any time by clicking on the Exercise Name from the Exercise View screen.

If an exercise is completely canceled, return to this screen, click the “Delete” button, and confirm the deletion when prompted. The “Delete” button will appear only if all documents and attachments associated with the exercise have also been deleted.

## Scheduling Exercise Planning Conferences and Conduct

1. Once an exercise is initiated, the user can schedule planning conferences, exercise conduct, and other related dates on the comprehensive calendar. From the Exercise View, click the “Schedule Planning Dates” link next to the name of the exercise you are scheduling.

Exercise Name	Calendar	Exercise Status	Point of Contact	Exercise Last Modified
<a href="#">Springfield Test Tabletop</a>	<a href="#">Schedule Planning Dates</a>	Initiated	Joe Exercise Planner	2004-04-27 11:21:00 (Seidenschwarz, Jamie)

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2. When you arrive at the Planning Schedule screen, click the “Add Dates” button.

Event Type	Start Date	End Date	Action
You have no dates yet.			

3. Choose one of several planning conferences, exercise conduct, or an “other” activity. Enter the start and end dates and times of the activity. Be cognizant of the time zone as it may not default to your time zone, and the end date as it will not default to the start date. Choose “Dates TBD” if a placeholder is needed. When finished, click “Save Data.”

Instructions: To enter in a date, select from the dropdowns a start AND end date. If you do not know this information, check the "Dates TBD" box.

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## Viewing the Calendar

1. Once you have saved your scheduling data, click the “Calendar View” button.

Event Type	Start Date	End Date	Action
Initial Planning Conference	16-Jan-04 9:00 AM	16-Jan-04 11:00 AM MT	<a href="#">Edit</a> <a href="#">Delete</a>
Exercise Conduct	25-Mar-04 8:00 AM	25-Mar-04 11:00 AM MT	<a href="#">Edit</a> <a href="#">Delete</a>

2. You will arrive at a calendar view of activities related to the exercise you scheduled in the previous step. To view a calendar of all exercise activities in your State, click the “Switch to State View” link. To view all exercise activities occurring in the country, click the “Switch to National View” link. In either view, the user can gain more information by clicking on the name of the exercise. If the word “more” appears on a day on the calendar, follow the link to view additional exercises scheduled on that day.

### Exercise Calendar Example

April 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28 FPC	29	30	

viewing:  
**Springfield Test Tabletop**

[Switch to State View](#)  
[Switch to National View](#)

**Legend:**  
**Exercise Types**  
S - Seminar  
W - Workshop  
TTX - Tabletop  
G - Game  
D - Drill  
FE - Functional  
FSE - Full-Scale

**Event Types**  
IPC - Initial Planning Conference  
MPC - Mid-Term Planning Conference  
FPC - Final Planning Conference  
Conduct - Exercise Conduct  
AAC - After-Action Conference  
MSEL - MSEL Conference  
C&O - Concept and Objectives Meeting

## State Calendar Example

◀◀ ◀ **May 2004** ▶ ▶▶

Go

viewing:  
 go

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

[Switch to National View](#)

**Legend:**

**Exercise Types**

- S - Seminar
- W - Workshop
- TTX - Tabletop
- G - Game
- D - Drill
- FE - Functional
- FSE - Full-Scale

**Event Types**

- IPC - Initial Planning Conference
- MPC - Mid-Term Planning Conference
- FPC - Final Planning Conference
- Conduct - Exercise Conduct
- AAC - After-Action Conference
- MSEL - MSEL Conference
- C&O - Concept and Objectives Meeting

## National Calendar Example

◀◀ ◀ **April 2004** ▶ ▶▶

Go

viewing:  
 go

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

[Switch to Exercise View](#)

**Legend:**

**Exercise Types**

- S - Seminar
- W - Workshop
- TTX - Tabletop
- G - Game
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**Event Types**

- IPC - Initial Planning Conference
- MPC - Mid-Term Planning Conference
- FPC - Final Planning Conference
- Conduct - Exercise Conduct
- AAC - After-Action Conference
- MSEL - MSEL Conference
- C&O - Concept and Objectives Meeting

3. These calendars can also be viewed prior to initiating the scheduling process by clicking on the “Exercise Calendar” link from the CSIS main screen.

### Exercise Scheduler

Forms

[Exercise Scheduler and Reporting](#)

### Reports

[Exercise Calendar](#)

# REPORTING EXERCISE INFORMATION

ODP is committed to improving the preparedness of Federal, State, and local agencies by applying facilitating the application of lessons learned and recommendations for improvement garnered from exercise activities. The Secure Portal reporting tool is intended to be a user-friendly template for reporting on ODP-sponsored exercises.

## After Action Reports/Improvement Plans

1. To begin the reporting process, return to your State scheduling and reporting page by clicking on the “Exercise Scheduling and Reporting” link at the top of the page below the ODP logo.



2. From the State scheduling and reporting page, click on the “Reporting” link.
3. To submit an After Action Report (AAR), click on the “Submit AAR” link next to the name of that exercise.

Select State:		Alabama	Select Year:		2004	View
Exercise Name	AAR/IP	Exercise Overview	Exercise Status	Point of Contact	Exercise Last Modified	
<a href="#">Springfield Test Tabletop</a>	<a href="#">Submit AAR</a>	<a href="#">View Overview</a>	Scheduled	Joe Exercise Planner	2004-04-27 12:00:00 (Seidenschwarz, Jamie)	

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4. To upload an AAR, click the “Browse” button and find the appropriate file on your computer.

- a. Once the file is uploaded, only users who have permission to access your State’s information will be able to view the AAR by clicking the “download” link or “Edit AAR” button. The file can also be deleted and

**After Action Report - Springfield Test Tabletop**

Exercise Type: Tabletop

Upload AAR:

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**After Action Report - Springfield Test Tabletop**

Exercise Type: Tabletop

AAR: [download](#)

CSID Help Desk: If you have any policy related questions involving this Scheduling application, please contact the CSID Help Desk at (202) 514-8006 or toll-free at 1 800 368-6498. If you are experiencing problems using the portal, please contact the ESP Group Help Desk at (804) 744-8800 or by email at [helpdesk@espgroup.net](mailto:helpdesk@espgroup.net).

replaced with an edited version at any time.

- To build an Improvement Plan matrix, you must upload an AAR, then click the “Develop Improvement Plan” button.
- Click on the “Add Task” button.

Task	Recommendation	Improvement Action	Responsible Party	Completion Date
<input type="button" value="Add Task"/> <input type="button" value="View the AAR"/> <input type="button" value="Cancel"/>				
<small>CSID Help Desk: If you have any policy related questions involving this Scheduling application, please contact the CSID Help Desk at (202) 514-8006 or toll-free at 1 800 368-6498. If you are experiencing problems using the portal, please contact the ESP Group Help Desk at (804) 744-8800 or by email at <a href="mailto:helpdesk@espgroup.net">helpdesk@espgroup.net</a>.</small>				

- You will be asked to assign one Recommendation, Improvement Action, Responsible Party, and Completion Date to each Task. When this information is entered, click the “Add Row” button.

Task	Recommendation	Improvement Action	Responsible Party	Completion Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="April"/> <input type="text" value="27"/> <input type="text" value="2004"/>
<input type="button" value="Add Row"/> <input type="button" value="Cancel"/>				
<small>CSID Help Desk: If you have any policy related questions involving this Scheduling application, please contact the CSID Help Desk at (202) 514-8006 or toll-free at 1 800 368-6498. If you are experiencing problems using the portal, please contact the ESP Group Help Desk at (804) 744-8800 or by email at <a href="mailto:helpdesk@espgroup.net">helpdesk@espgroup.net</a>.</small>				

- As you continue to build the IP matrix, you may either add additional Recommendations to existing Tasks and additional Improvement Actions to existing Recommendations, or you may add additional Tasks.

Task	Recommendation	Improvement Action	Responsible Party	Completion Date	
Decontamination	Improve setup time	Conduct Drill	Fire Department	30-Jun-04	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">Add Recommendation to this Task</a>	<a href="#">Add Improvement Action to this Recommendation</a>				
<input type="button" value="Add Task"/> <input type="button" value="View the AAR"/> <input type="button" value="Cancel"/>					
<small>CSID Help Desk: If you have any policy related questions involving this Scheduling application, please contact the CSID Help Desk at (202) 514-8006 or toll-free at 1 800 368-6498. If you are experiencing problems using the portal, please contact the ESP Group Help Desk at (804) 744-8800 or by email at <a href="mailto:helpdesk@espgroup.net">helpdesk@espgroup.net</a>.</small>					



## Exercise Overview

1. Return to the Exercise Summary page.



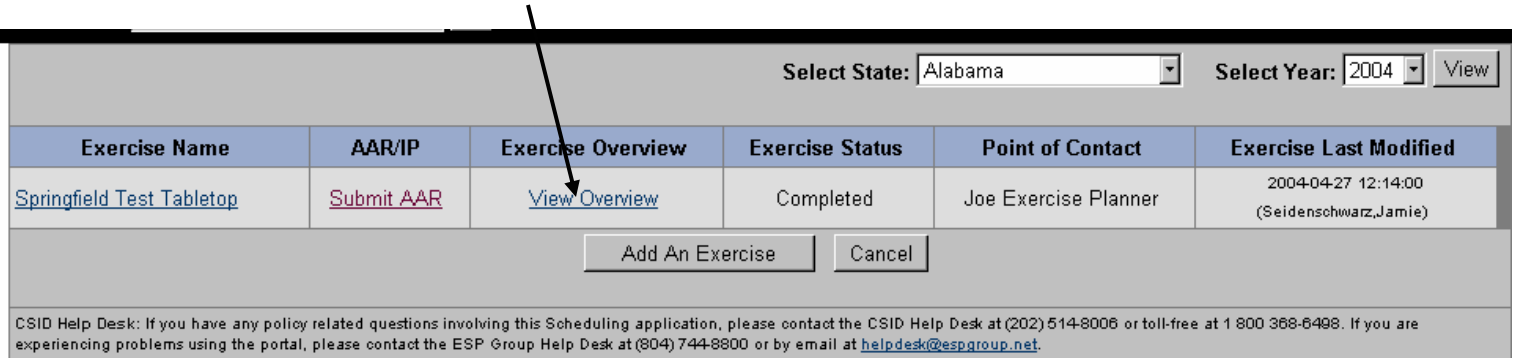
ODP Office for Domestic Preparedness

Home -> CSIS Main Page -> Exercise Scheduler and Reporting -> Exercise Summary

Home | Security | Messaging | Library | Find Users | Calendar | Online Briefings | Forum Discussions | Survey Wizard | Chat | WebPort | TaskTrac | Logout

Help Desk phone: (804) 744-8800  
email: helpdesk@espgroup.net

2. Click the “View Overview” link in the Exercise Overview Column.



Exercise Name	AAR/IP	Exercise Overview	Exercise Status	Point of Contact	Exercise Last Modified
<a href="#">Springfield Test Tabletop</a>	<a href="#">Submit AAR</a>	<a href="#">View Overview</a>	Completed	Joe Exercise Planner	2004-04-27 12:14:00 (Seidenschwarz, Jamie)

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3. This form asks the user for detailed information regarding the exercise. Help buttons offer a detailed description of the information required for each category. To view a category description, click on the red question mark next to that category. When the form is complete, click the “Save Changes” button.

**Springfield Test Tabletop**

Start Date: May 05 2004

End Date: May 05 2004

Exercise Type: Tabletop

Program: Homeland Security Exercise and Evaluation Program

Scenario: Chemical release or threat

Focus: Response  
Recovery

Classification: For Official Use Only

Number of Participants:

**Location**

Scope: State/Local

Primary Jurisdiction: Springfield

Federal Region:

Country: United States

Military Installation:

**Participants (Agencies, Departments, Organizations)**

Local:

State:

Federal:

International:

**Federal Sponsor Agency**

Agency Name: Office for Domestic Preparedness

HQ Involvement:  Participate  Control  Evaluate  None

Regional Office Involvement:  Participate  Control  Evaluate  None

**Federal Exercise Project Officer**

Name:

Phone:

E-mail:

**Co-Sponsors**

State Agencies:

Federal Agencies:

Contract Support:

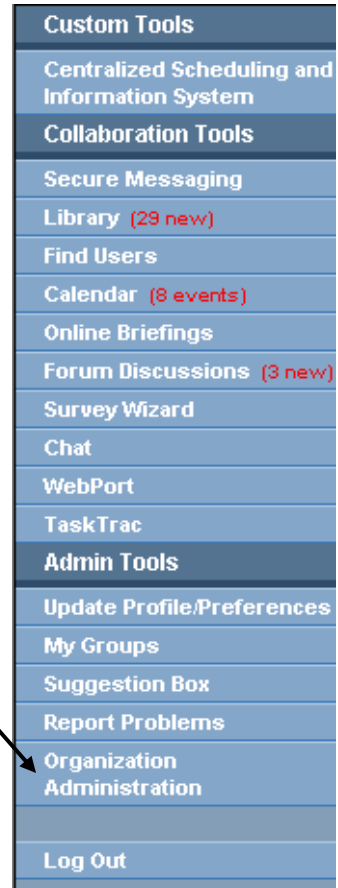
Notes:

Save Changes

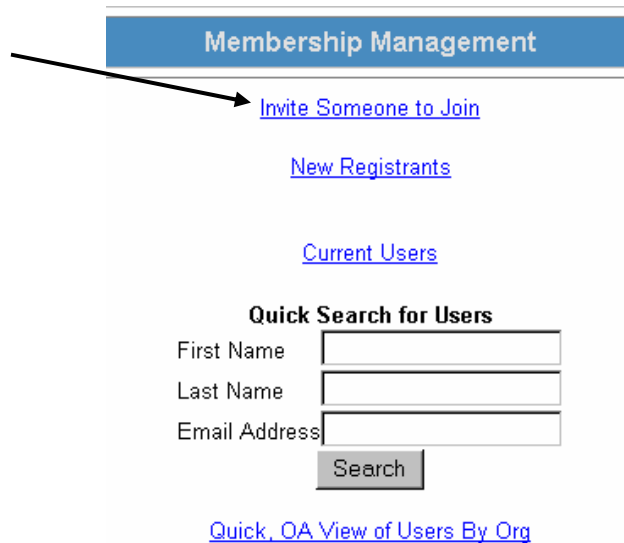
Cancel

## Inviting Others to Join the Portal

1. If you are a Portal Administrator you will see a link on the left hand side of the homepage entitled “Organization Administration.”



2. If you click on “Organization Administration,” you will see a link to “Invite Someone to Join”



3. Enter the email address of the person you wish to invite, separating multiple addresses with commas. Pull down the menu under Organization to Join and choose the name of your State. If you prefer, enter a personal message in the white box. The instructions in the blue box will appear in the recipient's email automatically. To complete the invitation, hit the "Send" button.

**Invite another project member to join the Portal**

**To:**   
(Enter in email address. For more than one, separate by commas.)

**Subject:** **[Your Name]** : invites you to join the Portal.

**Organization to join:**

**Your Personal Invite Message:**  
(optional)

**Invite Message:**

You are invited to register to the Portal. The registration process is as follows:

1. Click on the link <https://odp.esportals.com/login.cfm>.
2. Click on the link that states, "If invited to join, click HERE to register."
3. When prompted, please enter Org ID: *(Provided based on selection above.)*
4. Type in the email address to which you received the new invitation. (You must use the email address that received the invitation; otherwise you will not be able to complete the registration process.)
5. Complete the remaining online application.
6. Click on the confirmation link in the verification email that is sent to you. The confirmation email will contain a link (which will either appear as the word 'verify' or a long string of alpha/numeric characters) that you will need to click on in order to complete your application.
7. You will receive one final email letting you know when your account is approved. Your account cannot be approved until you complete both the online application and click on the confirmation email.

If you need assistance, please contact the Help Desk at (804) 744-8800 or by email at [helpdesk@espgroup.net](mailto:helpdesk@espgroup.net). The Help Desk is available Monday through Friday, from 8:00am to 8:00pm EST.

Thanks!

[View Invitations Sent](#)

- The recipient of the email will follow the instructions for requesting access to the Portal. Once he/she has completed the process, you will receive a notification that his/her application is ready for final approval. Return to Organization Administration. Click on the “New Registrants” link.

**Membership Management**

[Invite Someone to Join](#)

[New Registrants](#)

[Current Users](#)

**Quick Search for Users**

First Name

Last Name

Email Address

[Quick, OA View of Users By Org](#)

- The names of users waiting to be approved to join your State’s organization will be listed. Click the circular button next to the names of those you wish to approve, then click the “Approve” button.

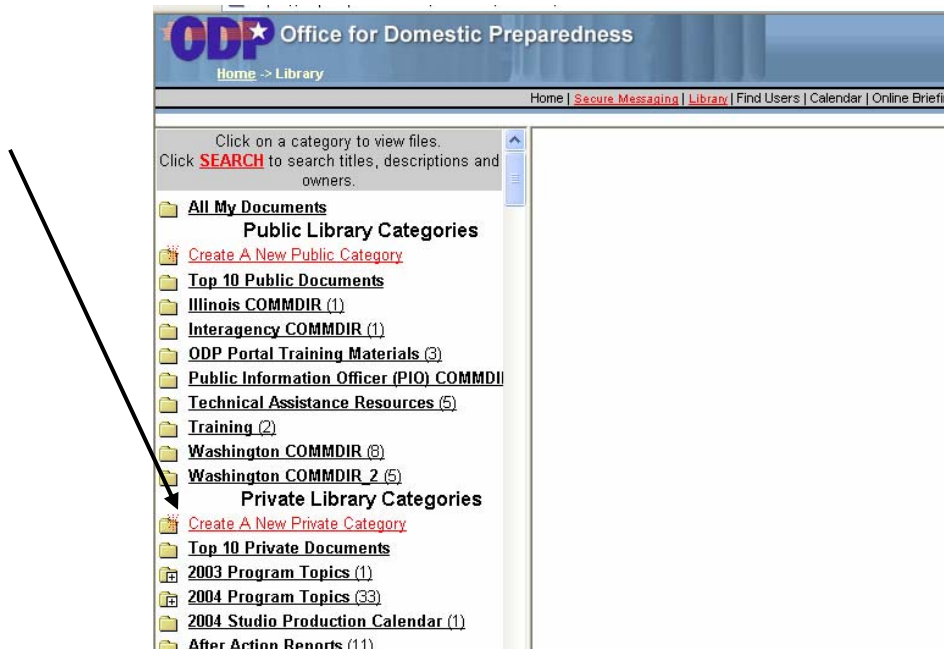
Name	Contact Info	Status	Approve	Delete
Name	exercise_planner@jurisdiction.state.us	Waiting for approval	<input type="button" value="Approve"/>	<input type="button" value="Delete"/>

- The user will now be able to log on to the portal using the log in name and password created during registration.

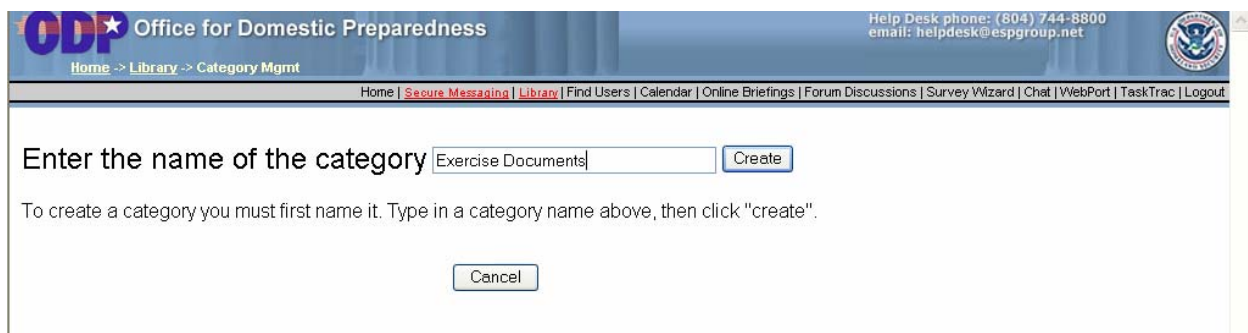
# PORTAL LIBRARY

## Managing Access to Library Folders

1. In order to create a folder in the Portal's Library for uploading and housing documents/files, click on the 'Create a New Private Category' link on the left side of the Library.



2. Give the folder a name (i.e., 'Exercise Documents')



- The next screen will allow you to manage access to the folder, so you can grant viewing rights to either individual users or an entire organization (i.e., your state).

Office for Domestic Preparedness  
Help Desk phone: (804) 744-  
email: helpdesk@espgroup.  
Library -> Category Mgmt  
Home | [Secure Messaging](#) | [Library](#) | [Find Users](#) | [Calendar](#) | [Online Briefings](#) | [Forum Discussions](#) | [Survey Wizard](#) | [Chat](#) |

Title of Category: Exercise Documents

Available Users

Users allowed to see category: Schweitzer, Robert (Office for Domestic Preparedness) (admin)

Orgs  Users  My Groups Refresh

Search

Finished Update Category Delete Category Cancel

- If you want to grant access to the folder to individual users, click the box next to 'Users' and hit the 'Refresh' button. If you want to grant access to an entire Organization (i.e. everyone in your State organization), click on the check box next to 'Orgs' and then click the 'Refresh' button.

Title of Category: Exercise Documents

Available Users

Users allowed to see category: Schweitzer, Robert (Office for Domestic Preparedness) (admin)

Orgs  Users  My Groups Refresh

Search

Finished Update Category Delete Category Cancel

5. Scroll down the list of Available Users that you would like to allow access to, and then add them to the right hand column by clicking on the > arrow. Click the Finish button when done granting access.

The screenshot shows a web interface for managing user access to a category. At the top, the 'Title of Category' is 'Exercise Documents'. Below this, there are two main columns. The left column, titled 'Available Users', contains a list of users: Hardy, Allan (Admin), Hubbard, Willett (Admin), Loughran, Julia (Admin), Miller, Chuck (Admin), and Stahl, Marcy (Admin). Below the list are radio buttons for 'Orgs', 'Users' (which is selected), and 'My Groups', along with a 'Refresh' button and a search box. The right column, titled 'Users allowed to see category', contains a list of users: Foote, Shelley (Admin), Schweitzer, Robert (Office for Domestic Preparedness) (admin), and Seidenschwarz, Jamie (T2 Management). Between the columns are '>' and '<' arrows. At the bottom of the interface are four buttons: 'Finished', 'Update Category', 'Delete Category', and 'Cancel'.

**Note:** Only the users who created the original folder can manage its access. Users that have been granted access to the folder can upload documents within the folder.

Please call the Portal Helpdesk (804-744-8800) with questions about administrative access and rights (i.e., deleting a user's account if he/she leaves the organization).