Conversations
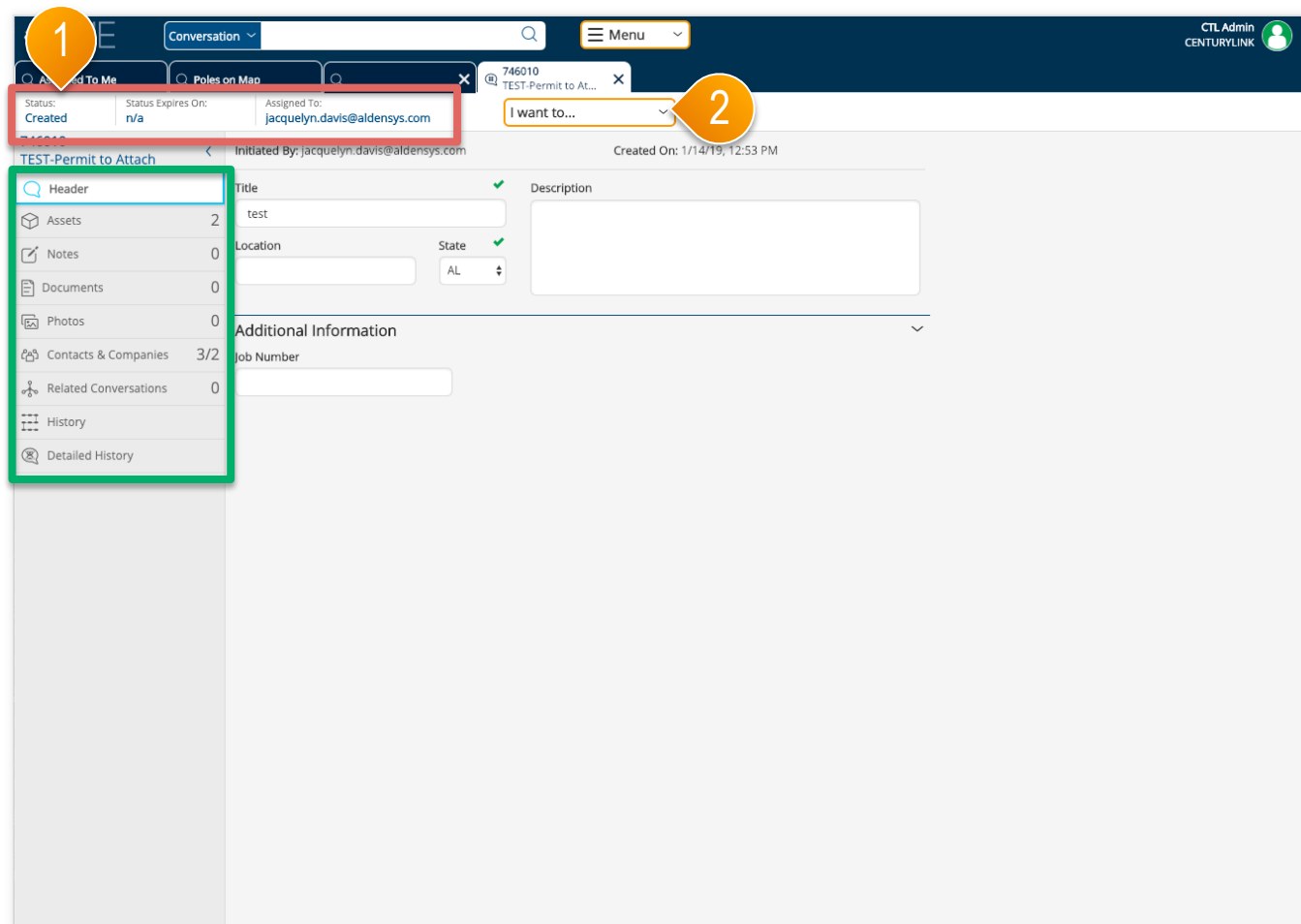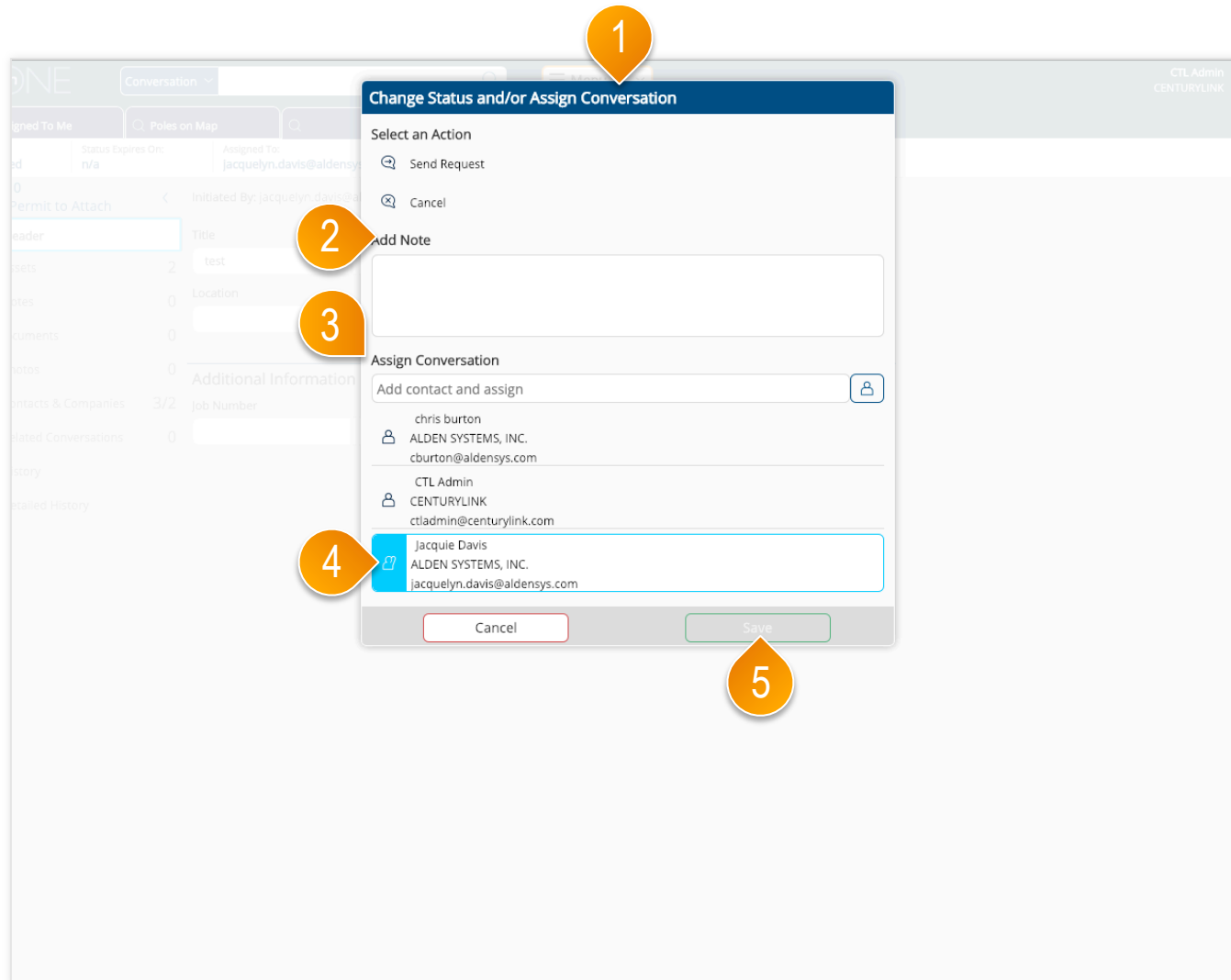
Conversation Overview

page walkthrough

① After opening a conversation in a new tab, the current status and current assignee are shown in the **red area**. Click anywhere in this area to take an action to change the statue or to change the assignee. Refer to the help topic Conversation – Change Status and Assignee for more information about these options.

② The "I want to..." menu has the actions for this conversation. From here, you can perform actions on the conversation (such as cloning the conversation, changing the status or assignment, etc.) or utility functions (like printing the conversation, sending an email reminder, etc.).

③ A conversation is divided into sections that can be quickly be accessed by clicking on the tabs at the left of the conversation in the **green area**. The count of items in each section is shown in each tab.

Conversation – Change Status and Assignee

alden ONE

page walkthrough

Change Status and/or Assign Conversation

Select an Action

- Send Request
- Cancel

Add Note

Assign Conversation

Add contact and assign

chris burton
ALDEN SYSTEMS, INC.
cburton@aldensys.com

CTL Admin
CENTURYLINK
ctladmin@centurylink.com

Jacquie Davis
ALDEN SYSTEMS, INC.
jacquelyn.davis@aldensys.com

Cancel   Save

① After clicking the Change button at the top of a conversation, the Status/Assign dialog is displayed. Select from the available workflow actions to change the status of the workflow. The selected action to be applied has a light blue icon to the right of the action name. The available actions are dependent upon the current status of the conversation.

② In some cases, a note is required when performing an action on a conversation. A note can be added even when it is not required.

③ The list of contacts from the conversation are listed. Add a new contact by typing a user's name or email address.

④ Set the new assignee by clicking the desired contact. The selected user to be assigned has a light blue icon to the right of the user's name.

⑤ Click "Save" to save your changes.

Conversation – Header Section

① The conversation will start on the header tab. If you are in another section, click Header to move back to the first section of the conversation. You can add or update the general information for the conversation by entering values into the fields located in this section.

② Some fields cannot be edited. These are designated with a lock icon.

③ Some fields are required. If required, the field will be outlined in red with an asterisk.

④ Enter a value in the required fields, then they will be marked with a green checkmark to indicate the requirement has been met.

⑤ You must enter a value into required fields marked with a red asterisk before you are allowed to save the conversation.

Conversation – Assets Section (Map View)

Conversation – Assets Section (Grid View)
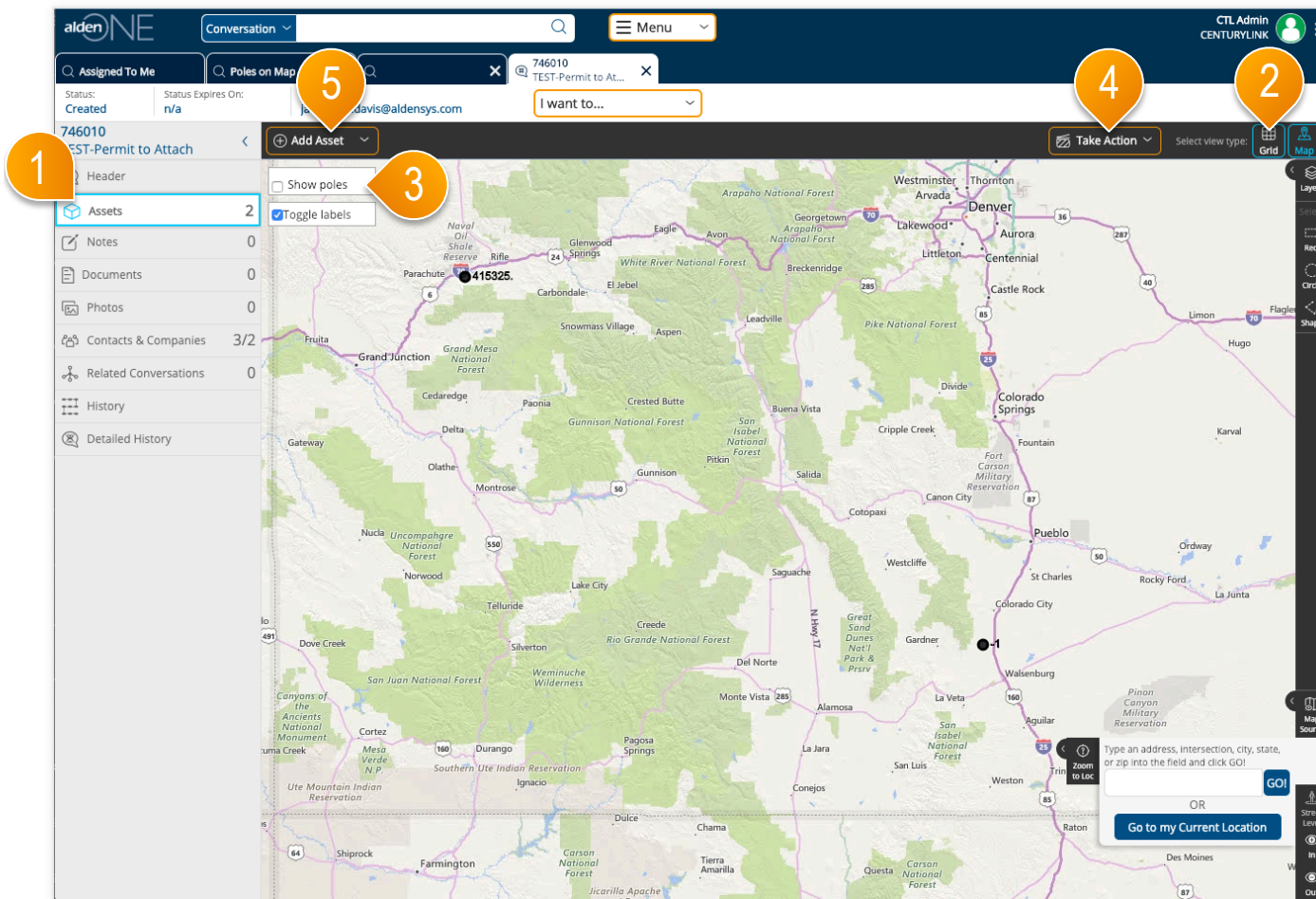
① Click the Assets tab to move to the section of the conversation containing assets such as poles, as well as sub-assets such as pole attachments. Each conversation type may have different asset types.

② To switch to a grid view of the assets, click Grid.

③ Select an asset or assets by clicking the checkbox at the start of the row.

④ Once at lease one asset is selected, the Take Action menu will become available. Perform an action on the selected assets by picking the action from the menu.

⑤ Expand your assets to view the sub-assets/attachments/proposed attachments by clicking the plus icon next to the row.

⑥ To view only the attachments on the conversation, click "Hide Poles,"

alden ONE

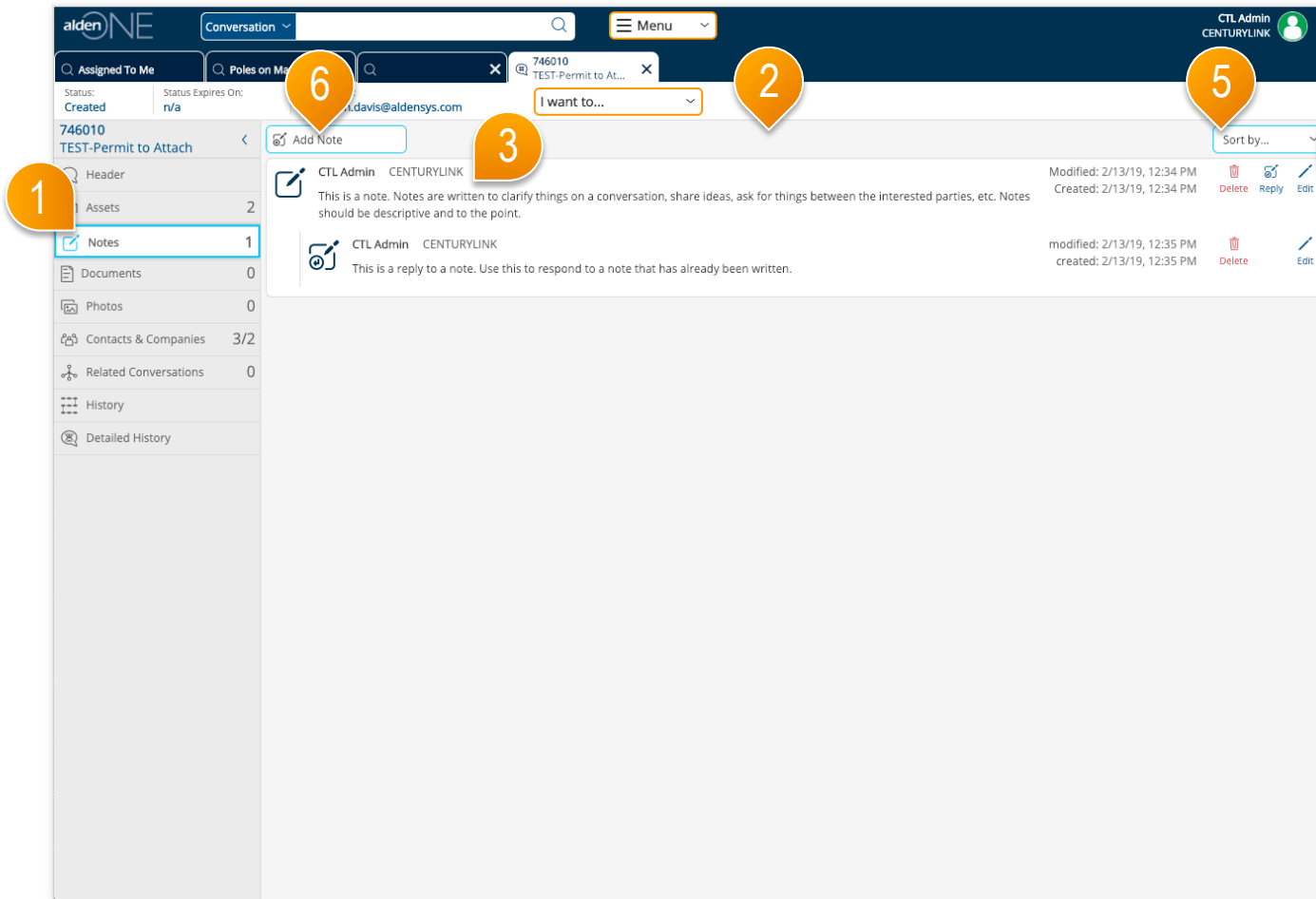# Conversation – Add Poles Not In System

① Go to the map view.

② To look for assets in the same area, click "Show Poles."

③ **If you do not see your asset on the map after clicking "Show Poles."** you can add it to the map by clicking "Add Asset." Then, click the place on the map where the pole is.

④ Fill in the information you have about the pole, click "Save," and it will be added to the conversation.

Conversation – Notes Section

Conversation – Add, Edit, & Share Notes

① Enter your note text, or modify existing note text if editing a note.

② Click either Public or Private to set the security on this note. The selected option has a light blue icon. When you select Is Private, other options for contact and company permissions are displayed.

③ The existing contacts and companies are listed. You can share a note with one or more contacts or companies. By default, a private note is not shared with any contacts or companies. Select the Shared option beside each user or company that you want to be able to view this note. Select the Private option beside each user you do NOT want to be able to view this note. The selected option for each user has a light blue icon.

④ Enter a new contact on the conversation by typing the user name or email address, then click the add button to the right of the Add Contact field. Similar options are available to add companies to the conversation.

⑤ Click "Save" to save your changes and add the note.

![alden ONE logo] **Conversation – Documents Section**
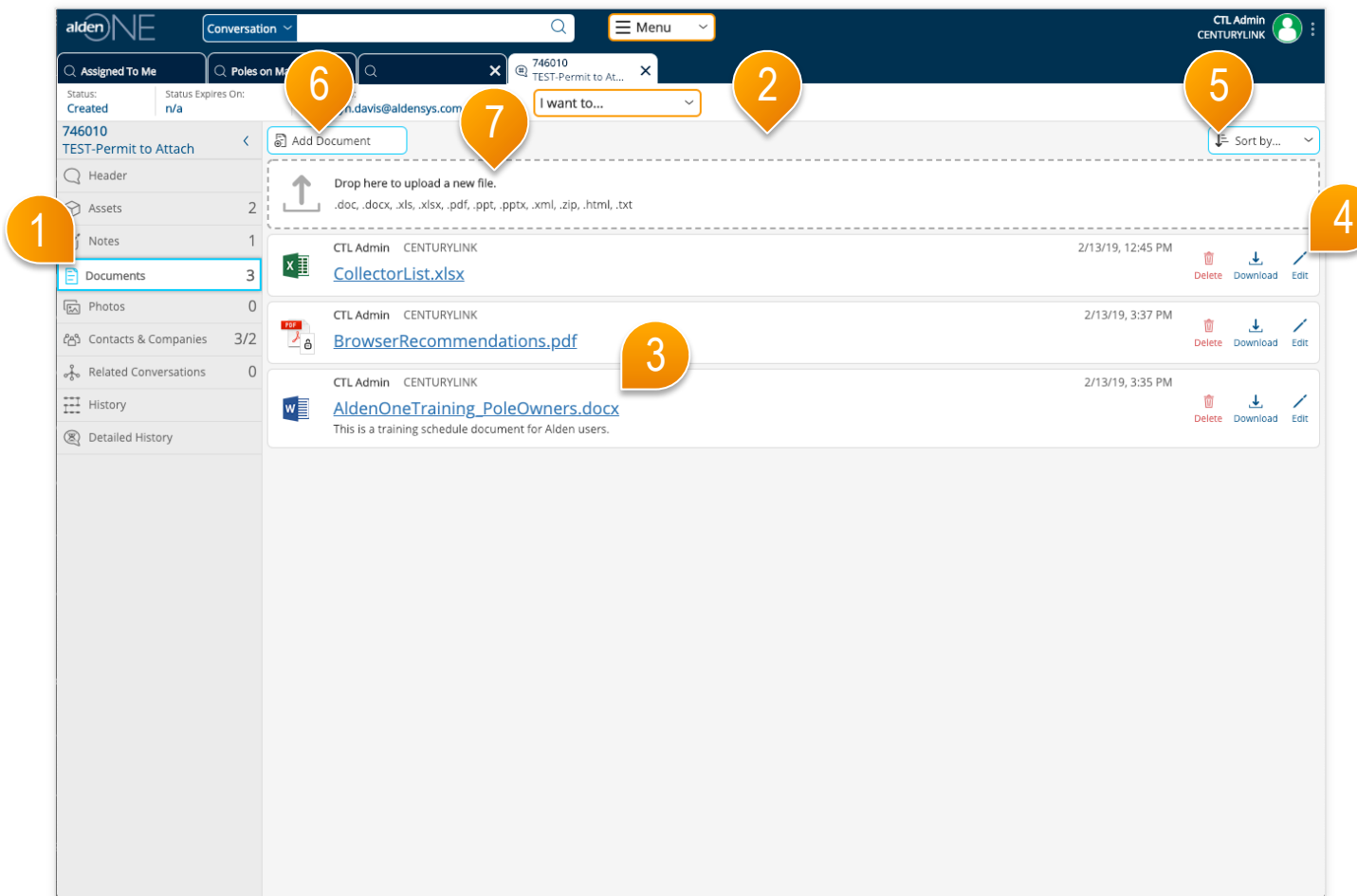
page walkthrough

① Click the Documents tab to move to the conversation documents section. The count of documents is shown in the tab.

② You can view all documents on the conversation except those that someone has marked private that are not intentionally shared with you or your company. Documents that you have marked private are indicated with a lock icon on the right of the document.

③ Each document indicates the filename and extension of the document, the user that added the document and their company, and the date the document was last modified. If a description was entered, it appears below the document filename.

④ You can delete or edit document information only for documents that you added. You can also save a document to your desktop. To edit a document's content, save the document to your desktop, make changes, then upload it to Alden One again.

⑤ Use the Filter option to change the sort order of the documents.

⑥ Click Add Document to upload a new document. Refer to the help topic Conversation – Add, Edit, & Share Documents for more information.

⑦ You can also drag a file from your desktop into the area outlined by the dotted line.

Edit Document ✕

BrowserRecommendations | .pdf

1 Add Description (optional)

This is our document with browser recommendations. Please follow the guidelines in this document.

2 👁 Public - Only people/companies on this conversation can view.

🔒 Private - Select people/companies who can view.

Who can see this?

Contacts

Add Contact

chris burton
Company: ALDEN SYSTEMS, INC.
Username: cburton
Email: cburton@aldensys.com
👁 Shared | 🔒 Private

4 Jacquie Davis
Company: ALDEN SYSTEMS, INC.
Username: jdavis
Email: jacquelyn.davis@aldensys.com
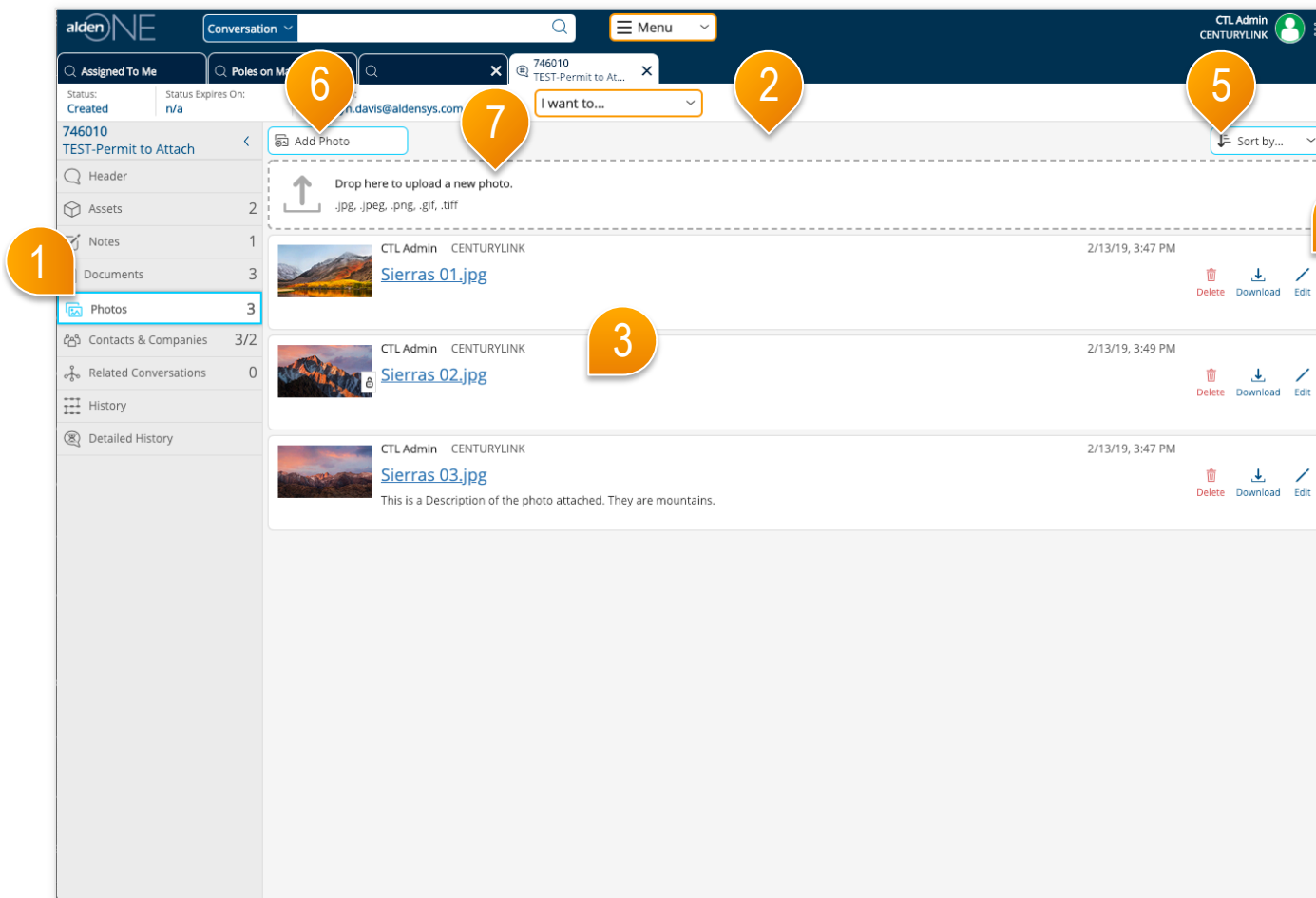👁 Shared | 🔒 Private

Companies

Add Company

ALDEN SYSTEMS, INC.
Company Contact Name: Notify Support
Company Contact Email: notifysupport@aldensys.com
👁 Shared | 🔒 Private

CENTURYLINK
Company Contact Name: Marcy Aguon
Company Contact Email: Marcy.Aguon@centurylink.com
👁 Shared | 🔒 Private

Cancel | **Save**

5

page walkthrough

① Enter a document description if desired, or modify existing description text if editing a document.

② Click either Is Public or Is Private to set the security on this document. The selected option has a light blue icon. When you select Is Private, other options for contact and company permissions are displayed.

③ Enter a new contact on the conversation by typing the user name or email address, then click the add button to the right of the Add Contact field. Similar options are available to add companies to the conversation.

④ The existing contacts and companies are listed. You can share a document with one or more contacts or companies. By default, a private document is not shared with any contacts or companies. Select the Shared option beside each user or company that you want to be able to view this document. Select the Shared option for any contact you would like to share this document with.

⑤ Click "Save" to save your changes.

alden ONE · Conversation – Photos Section

page walkthrough

① Click the Photos tab to move to the conversation photos section. The count of documents is shown in the tab.

② You can view all photos on the conversation except those that someone has marked private that are not intentionally shared with you or your company. photos that you have marked private are indicated with a lock icon on the right of the photo.

③ Each photo indicates the filename and extension of the photo, the user that added the photo and their company, and the date the photo was last modified. If a description was entered, it appears below the photo filename.

④ You can delete or edit photo information only for photos that you added. You can also save a photo to your desktop. To edit a photo's content, save the photo to your desktop, make changes, then upload it to Alden One again.

⑤ Use the Filter option to change the sort order of the photos.

⑥ Click Add photo to upload a new photo. Refer to the help topic Conversation – Add, Edit, & Share photos for more information.

⑦ You can also drag a file from your desktop into the area outlined by the dotted line.

Conversation – Add, Edit, & Share Photos

![alden ONE logo]

Edit Photo   ✕

| Sierras 03 | .jpg |

Add Description (Optional)

This is a Description of the photo attached. They are mountains.

1

2 ⊙ Public - Only people/companies on this conversation can view.

🔗 **Private** - Select people/companies who can view.

Who can see this?

Contacts

3 Add Contact

4 chris burton   👁   🔗
Company: ALDEN SYSTEMS, INC.   Shared   Private
Username: cburton
Email: cburton@aldensys.com

Jacquie Davis   👁   🔗
Company: ALDEN SYSTEMS, INC.   Shared   Private
Username: jdavis
Email: jacquelyn.davis@aldensys.com

Companies

Add Company

| Cancel | Save |

5

Conversation – Contacts & Companies Section

① Click the Contacts & Companies tab to quickly move to the conversation contacts & companies section. The count of contacts and companies is shown in the tab. The first number indicates the number of contacts and the second number, after the slash, indicates the number of companies. Users listed as a contact have access to this conversation. All users belonging to the companies listed have access to this conversation.

② To add a new contact, type a user's name or email address in the Add Contact field, then click the button to the right of the field to add that user as a contact. Similarly, to add a new company, type the company name, then click the button to the right of the field to add that company.

③ Each contact shows the user's name, email address, and company name.

④ Each company shows the company name along with the main person to contact for that company and their email address.

⑤ The contact to whom the conversation is assigned is indicated by the user icon with the raised hand and the outline of blue. You can remove some users from the list of contacts, but you cannot remove the user who created the conversation, nor the user to whom the conversation is currently assigned. Click the assign button beside a user to assign the conversation to that user.

⑥ To grant read-only access to a user or company, click "Read-only" next to the user or company. That user or company will still be able to add notes, documents, and photos, view all information on the conversation, but will not be able to edit any header information, change the status of the conversation, or reassign it.

Conversation – Related Conversations Section

① Click the Related Conversations tab to quickly move to the related conversations section. The count of related conversations is shown in the tab.

② You can view parent conversations and child conversations. Click the link in the first column to open a related conversation in a separate tab.

③ If the related conversation is in a final status, a check appears in the Is Closed column; otherwise nothing appears in this column.

④ Scroll left and right in these tables to see other information about each related conversation.
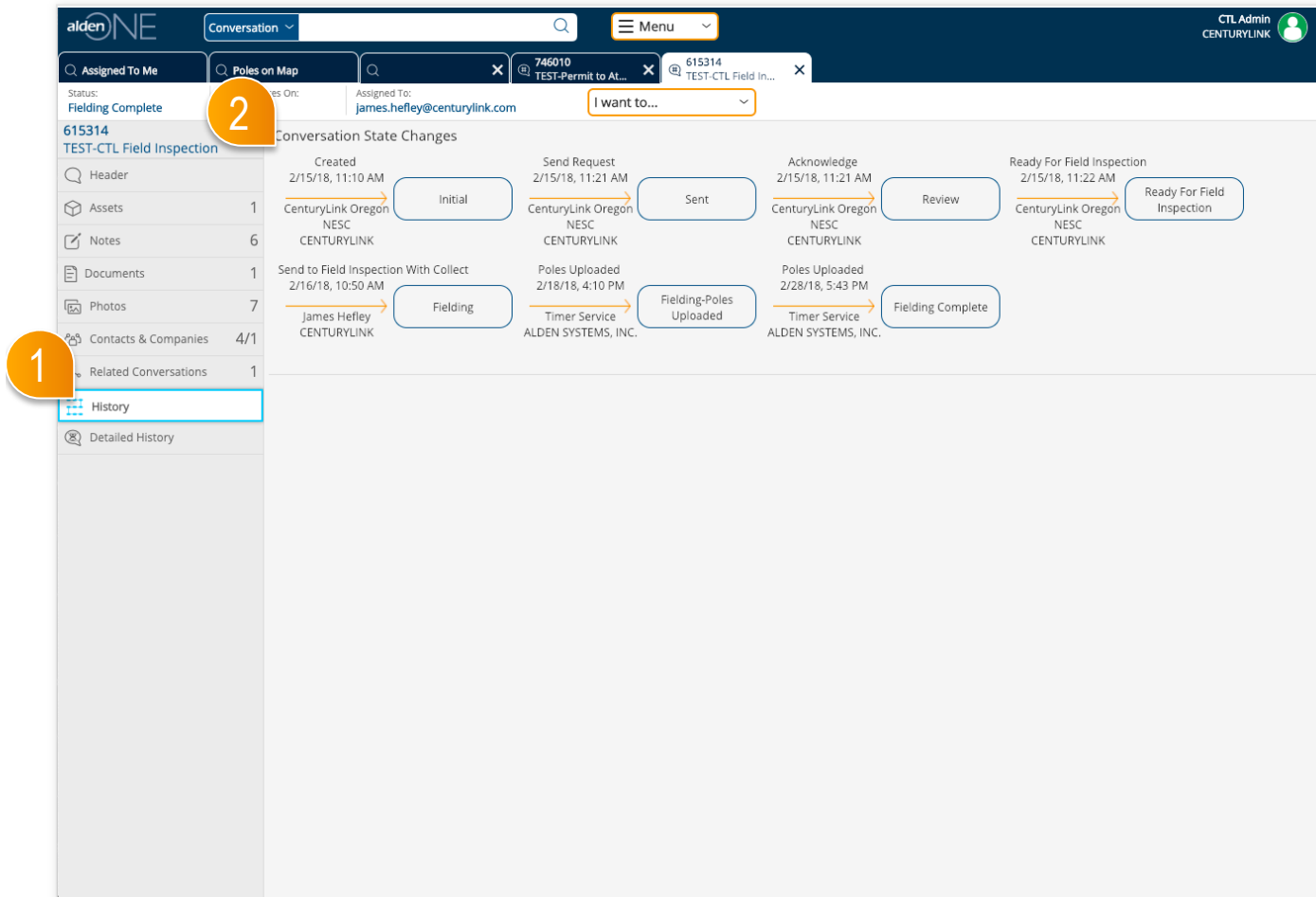
Conversation – History Section

① Click the History tab to quickly move to the conversation history section.

② In the Conversation State Changes section, you can view a diagram of all of the workflow actions and resulting state changes that have occurred on this conversation. These details include the action name, the date and time of the action, the resulting status name, and the user that performed the action along with their company name.

![Alden ONE logo] **Conversation – Detailed History Section**

page walkthrough

① Click the Detailed History tab to quickly move to the detailed conversation history section.

② Each workflow action, as well as field and asset modifications, added notes, documents, photos and any other changes are listed in the Detailed History section.

③ Use the "Sort by" option to change the sort order of the Detailed History ecords.