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LINKSPACE USER GUIDE

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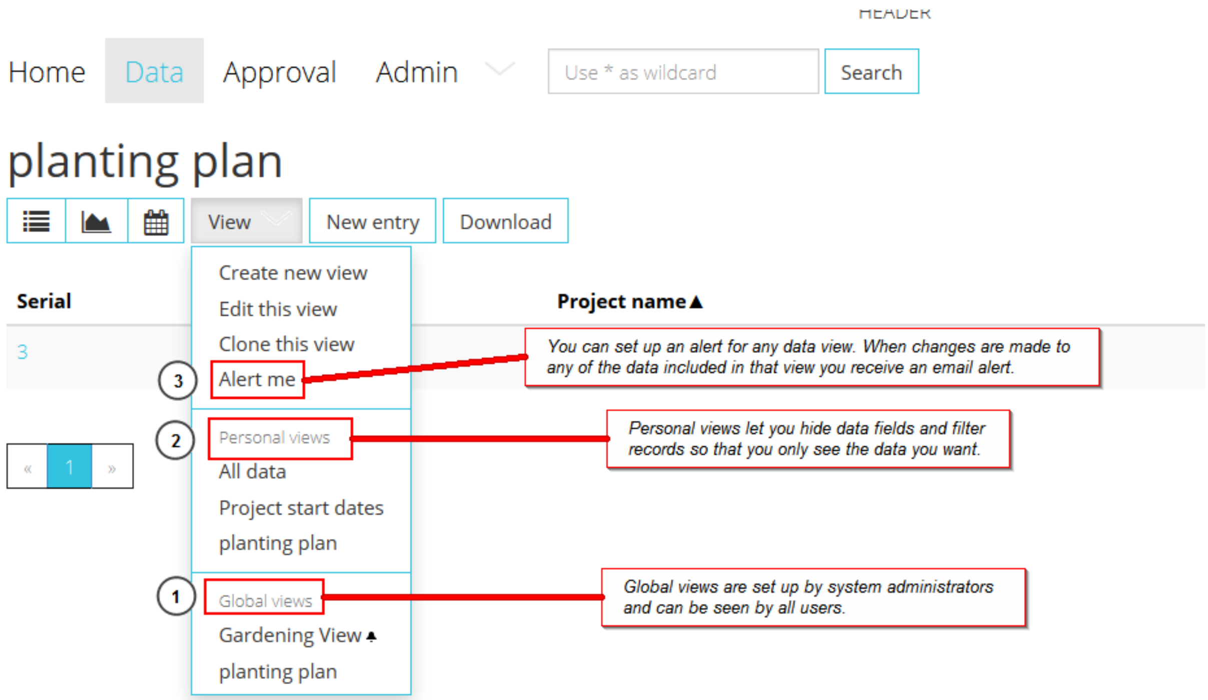
1. Quick start guide for Linkspace users

Linkspace has been designed to make it easy for teams, departments and organisations to share and update information across multiple locations.

As a general Linkspace user, once you have logged in, almost everything you need can be found under the **Data** tab. Exactly what you can do in the system will depend on the permissions you have been given by the system administrator though. You may only be able to view data, or you may be able to add records or just edit records.

1.1 USING THE POWER OF DATA VIEWS

One of the things that makes Linkspace easy to use is that it allows you to quickly see only the data you need, rather than having to contend with columns and rows of data that may be irrelevant to your team or your specific tasks. You can save sorted and filtered views of the data so that you can access them immediately when you log in.



You can also set up alerts for any of your data views. Once you have set an alert on a view, you will receive a notification when any data for that view is updated, or new data is added.

Under the **Data** > **View** dropdown menu, you can see global views. These are views of the data that are set up by the systems administrators. You may also have the permissions to set up personalised data views, which let you set up your own views, filtering and sorting records and hiding anything you don't need.

You can also set up alerts for any of your data views. Once you have set an alert on a view, you will receive a notification when any data for that view is updated, or new data is added.

2. RECORDS: Adding, editing and deleting records

2.1 ADD A NEW RECORD

1. Click the **Data** tab in the top navigation
2. Click the **New record** button. If you do not have this button then you do not have permission to add new records.
3. Fill in the fields and click **Save**.

   NOTE: If your new record needs to be approved, you won't see it included in the data until someone with the correct permissions approves it. In this case, when you click on Save you should see a message confirming that your record has been submitted for approval. Otherwise you should see a message saying that your "Submission has been completed successfully."

2.2 EDIT A RECORD

1. Click the **Data** tab in the top navigation.
2. If you can't see the record you want to edit, click on the **View** dropdown and select the data view that will show you the record you need.
3. Alternatively, use the **Search** box at the top of the page to find your record.
4. Click **Edit** next to the number listed in the **ID** column of the record you want to edit.
5. If you do not have this button then you do not have permission to edit records.
6. Make any changes and click the **Save** button at the bottom of the record.

   NOTE: If your edits need to be approved, you won't see them immediately. In this case, when you click on Save you should see a message confirming that your edits have been submitted for approval. Otherwise you should see a message saying that your "Submission has been completed successfully."

2.3 DELETE A RECORD

1. Click the **Data** tab in the top navigation.
2. If you cannot see the record you want to edit, click on the **View** dropdown and select the data view that will show you the record you need.
3. Alternatively, use the **Search** box at the top of the page to find your record.
4. Click on the number listed in the **ID** column of the record you want to edit.
5. Open the **Action** menu and then click the **Delete** button. If you do not have this button then you do not have permission to delete records.
6. To confirm you want to delete the record, click the **Delete** button in the pop-up box that appears on your screen.

2.4 VIEW EARLIER VERSIONS OF A RECORD

1. Click the **Data** tab in the top navigation.
2. If you cannot see the record you want to edit, click on the **View** dropdown and select the data view that will show you the record you need.
3. Alternatively, use the **Search** box at the top of the page to find your record.
4. Click on the number listed in the **ID** column of the record you want to edit.
5. Click the **Version history** dropdown below the Record ID and select the version you wish to view.

2.5 SORT YOUR RECORDS

1. Click on any of the **field names** (column headers in bold) to sort the records according to the data in that column.
2. Click once to sort in ascending order, and a second time to sort in descending order.

Tip: To save time you can set up a personalised data view. This lets you customise and save the way you want your records to be sorted and displayed.

NOTE: When configuring the system, administrators can set the default sort by going to Admin > General settings

2.6 FILTER YOUR RECORDS

See: Use views to filter your data

2.7 DOWNLOAD YOUR DATA

If you have the permission to download data you will see a **Download** button in the row of icons at the top of any of your data views. Click the Download button, choose whether to Save or Download the file and click OK.

3. VIEWS: Viewing your data

Linkspace lets you create and save different views of the data so that you can hide any data that's irrelevant to you for specific tasks and focus on what you need.

Global views are set up by system administrators and can be seen by all users. Any user with the appropriate permissions can also set up their own **personalised views**.

3.1 CREATE A GLOBAL VIEW

Global views can be seen by all users. Not all users will have the permissions to create global views though.

1. Click the **Data** tab in the top navigation.
2. Click on the **View** dropdown and select the **Create new view** option.
3. On the Customise view page, type a name for your view in the **View name** box.
4. If you have the permission to create a global view you will see a **Global view tick box** under the View name box. Tick this box.
5. Now tick the boxes next to the fields (columns) that you want to display in your final view. (You can click on the check box next to Field name to select or deselect all of them.)

   NOTE: If you want to filter the records (rows) shown in your view according to specific criteria you can use the filter form. See: Use views to filter your data

6. To set the default order in which you want the final records to be displayed click on the **Add new sort** button. Select the field you want to sort by, and whether you want to display the results in ascending or descending order.
7. Finally, to create your view, click on the **Save** button at the bottom of your page.

Tip: You can set up alerts to notify you of any updates to the records shown in a specific view.

3.2 CREATE A PERSONALISED VIEW

Creating personalised views makes it easy for you to see only the data you want to see. It lets you hide fields that may not be relevant to you, and filter and sort according to your own criteria. Personalised views can only be seen by you, and there is no limit to how many you can create. Not all users will have the permissions to create personalised views though.

1. Click the **Data** tab in the top navigation.
2. Click on the **View** dropdown and select the **Create new view** option. If you do not have this menu item then you do not have permission to create views.

   NOTE: You can also create a new personalised view by modifying an existing view. To do this select Clone this view instead of Create new view from the View dropdown.

3. On the Customise view page, type a name for your view in the **View name** box.

4. Now tick the boxes next to the fields (columns) that you want to display in your final view. (You can click on the check box next to Field name to select all of them.)

   NOTE: If you want to filter the records (rows) shown in your view according to specific criteria you can use the filter form. See: Use views to filter your data

5. To set the default order in which you want the final records to be displayed click on the **Add new sort** button. Select the field you want to sort by, and whether you want to display the results in descending or ascending order.

   NOTE: You can also sort within a sort, i.e. you can sort by Country for example, and then sort by the cities within each country. You can continue to add multiple sort criteria in this way.

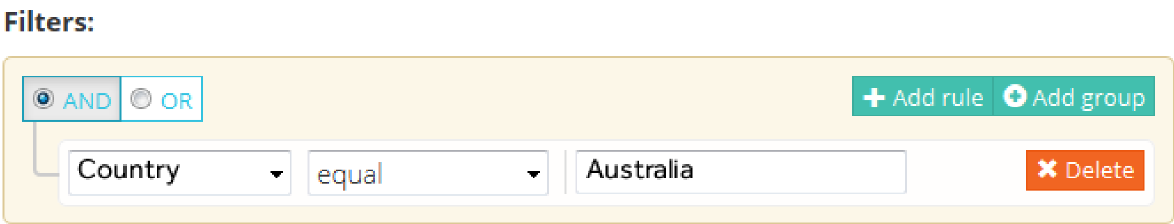
6. Finally, to create your view, click on the **Save** button at the bottom of your page.

Tip: You can set up alerts to notify you of updates to the records shown in a specific view.

3.3 USE VIEWS TO FILTER YOUR DATA

Filters can be used to only show records (rows) that meet specific criteria, making it easier to work with the data.

1. Click the **Data** tab in the top navigation.
2. To filter your records you need to create a new view. To do this, click on the **View** dropdown and select the **Create new view** option. If you do not have this menu item then you do not have permission to create views.
3. On the Customise view page, type a name for this view in the **View name** box.
4. Check the boxes of the fields that you want to be able to see in your final filtered list. (Click on the check box next to **Field name** to select or deselect all of them.)
5. Now create your filters using the **Filters** form.
6. Start by selecting the field you want the filter to apply to from the dropdown box. (Note that if you re-select the field name that you are using, then you will need to re-enter your search value for that particular field).
7. Use the next two boxes in the row to set the criteria for the filter. FOR EXAMPLE: If you only want to display projects that are in Australia, you would select Country from the list of data fields, then select equals from the second box, and then type Australia into the final value box.



   NOTE If you want to use dates in your filters use the form YYYY-MM-DD.

   If you want to filter by today's date, enter CURDATE in the value box. If you want to filter by your own name (i.e. the current user), enter CURUSER in the value box.

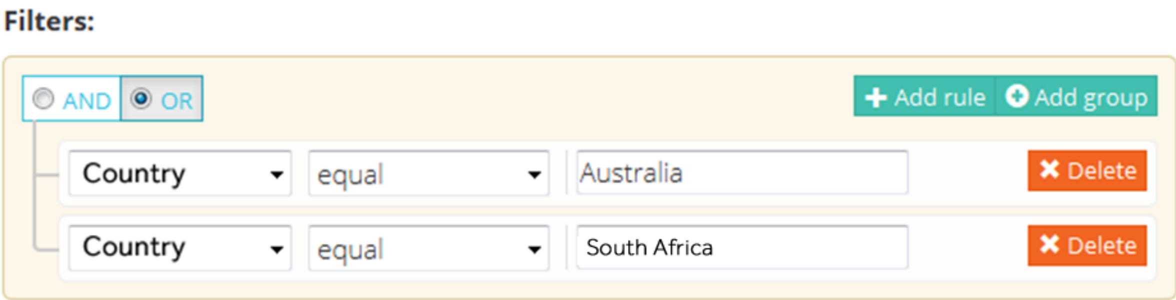
Besides using a filter to look for an exact term or value, you can apply a number of specialized filters. These include:

Equal	When you want an exact match for text or a number

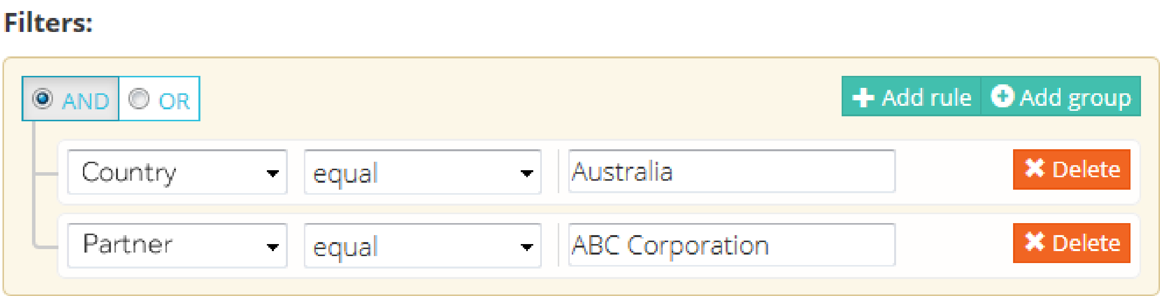
Not Equal	When you want everything except a specific term or number.
Less	When you want to display only the records where the value of this field is less than a specific number, ‘lower’ in the alphabet, or comes before a specific date.
Less or Equal	As above, but it also includes records with the value you specify.
Greater	When you want to display only the records where the value of this field is greater than a specific number, ‘higher’ in the alphabet or comes after a specific date.
Greater or Equal	As above, but it also includes the records with the value you specify.
Begins with	When you want to display only records that begin with a certain word or group of letters.

3.4 APPLY MORE THAN ONE FILTER TO A VIEW

1. You can apply several filters at the same time. For example, if you wanted to display projects that are in Australia or South Africa, you would add an OR filter, because you want to view all records where the value for Country is either South Africa or Australia. To do this select **OR** from the top of the filter box and then click the **Add rule**.

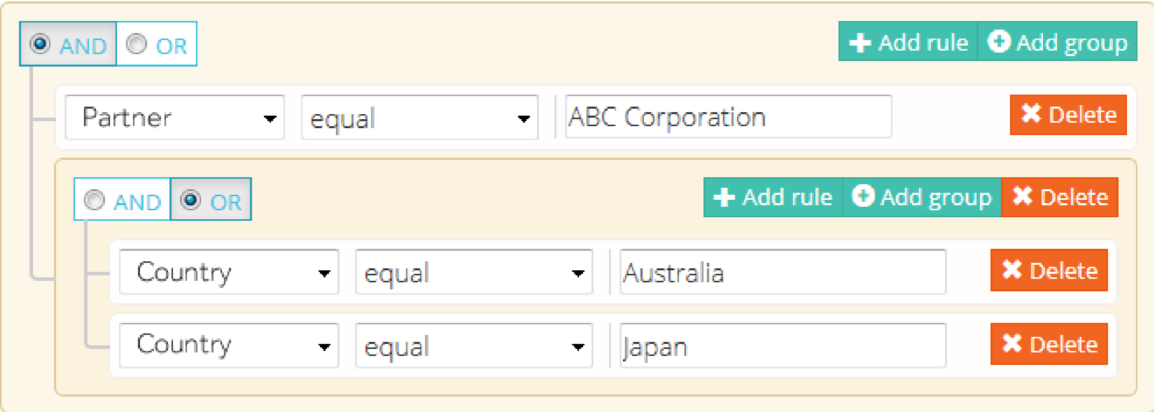


2. You can use an AND filter if you only want to display records that meet both the criteria you set. For example, if you wanted to see all projects that were in Australia and where the project partner was ABC Corporation, you would select **AND** from the top of the filter box and then click the **Add rule**.



3. You can **group your filters** to nest different criteria. For example, if you wanted to see projects where the partner was ABC Corporation and that are in either Australia or Japan, you would add the two countries as a separate sub-group.

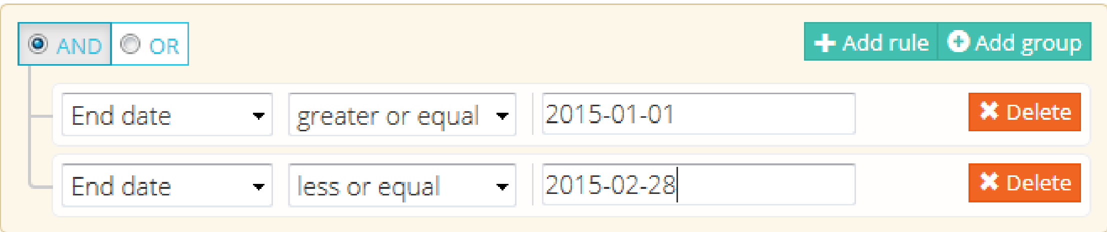
Filters:



4. If you want to use dates in your filters you need to use the form **yyyy-mm-dd**. To create a view that only displays records where a date field falls within a specific date range you need to set up criteria for the start date and for the end date.

   For example, if you want to display all projects that ended between 1 January and the 28 February 2015 your filter criteria would be End date 'greater or equal' to (i.e. on and after) 2015-01-01 AND 'less or equal' to (i.e. before or on) 2015-02-28.

Filters:



3.5 EDIT A VIEW

1. Click the **Data** tab in the top navigation.
2. Click on the **View** dropdown and select the view you wish to edit. The screen will now be displaying the view you want to edit.
3. Click on the **View** dropdown again and select **Edit this view**.

   NOTE: If you cannot see the Edit this view option in the View dropdown menu then you do not have permission to edit the view.

4. Make any changes you wish to make. You can rename your view, hide or unhide columns, or reset your filter or sort criteria.
5. To save your changes click the **Save** button at the bottom of your page.

3.6 DELETE A VIEW

1. Click the **Data** tab in the top navigation.
2. Click on the **View** dropdown and select the view you wish to delete. The screen will now be displaying the view you want to delete.
3. Click on the **View** dropdown again and select **Edit this view**.

NOTE: If you cannot see the Edit this view option in the View dropdown menu then you do not have permission to edit this view.

4. Scroll down to the bottom of the screen and click the **Delete** button.
5. To confirm you want to delete the view, click the **Delete** button in the pop-up box that appears on your screen.

3.7 USE THE CALENDAR VIEW

If any of your data views include dates you can view these using the calendar view. The calendar view will display each date and date range field on the calendar, with the key for each one shown at the top of the calendar.

1. Click the **Data** tab in the top navigation.
2. Click on the **View** dropdown and select the view you wish to see.
3. Click on the **Calendar icon** at the top of the page.

3.8 VIEW DATA AS A GRAPH

You can also see data in graph format. Graphs are configured by system administrators. They decide which fields are included in each graph and the form the graph will take (i.e. pie, bar, etc). To see these graphs:

1. Click on your name at the top of the page.
2. Select **My graphs** from the dropdown menu.
3. Tick the graphs you would like to be able to see and click **Save**.
4. Next, click the **Data** tab in the top navigation.
5. Click on the **View** dropdown and select the data view you wish to display a graph for.
6. Click on the **Graph icon** at the top of the page.
7. If this is the first time you are viewing graphs and you have skipped steps 1 to 3 then you will see a link to a page where you can select which of the configured graphs you want to see. Tick all the graphs you would like to see and click the **Save** button.
8. You should now see all the available graphs for that view displayed on a single screen. Some of the graphs may be 'empty' if your selected data view doesn't include the data fields that the graphs are set up for.

   NOTE: When you click on the Graph icon, all the graphs that you see on that page will only be using the data included in the view you have selected. You can see the data in any global or personal data view in terms of the graphs that have been set up. By setting up a personal view you can control exactly what data you want included in a graph.

9. To return to a table view click on the Table icon

3.9 HIDE GRAPHS YOU DON'T WANT DISPLAYED

1. Click on your name at the top of the page.
2. Select **My graphs** from the dropdown menu.
3. De-select the graphs you no longer want to see and click **Save**.

4. ALERTS: Setting alerts

You can set alerts so that you receive an email notifying you when someone else has updated data you are interested in. The alert will be sent to the email address that you use to log in to the system.

4.1 SET A CHANGE ALERT

Before you set your change alert, you may need to create a data view that includes the record(s) and/or fields you want to monitor, if one does not already exist. Any changes to the view will cause an alert to be sent, be it new rows appearing in the view, rows disappearing, or data items changing in fields that are included in the row. Once you have set up and selected your view you need to:

1. Click the **Data** tab in the top navigation.
2. Click on the **View** dropdown again and select **Alert me**.
3. In the pop-up box, select whether you want to receive notifications **Instantly** or **Every 24 hours**. If you select **Every 24 hours**, you will receive a daily summary email of all the alerts, normally overnight.
4. Click the **Save** button.

Tip: In any data view you save, you can select which data fields (columns) you want to include, and you can use filters to only show records (rows) that meet specific criteria. For example, to set an alert on one specific record you would first need to create a view that only shows that record.

4.2 CANCEL OR CHANGE AN ALERT

1. Click the **Data** tab in the top navigation.
2. Click on the **View** dropdown again and select **Alert me**.
3. In the pop-up box, change your alert to **Instant** or **Every 24 hours**, or select **Never** if you want to cancel the alert.
4. Click the **Save** button.

5. FIELDS: Adding, editing and deleting data fields

5.1 ADD A NEW FIELD

1. Click the **Admin** tab in the top navigation and select **Data Layout** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to add, edit or delete data fields.)
2. Click on the **Create new field** button.
3. You will be presented with the **Create new field** screen.
4. Give your field a name e.g. Project. (You can use spaces and special characters in field names.)
5. Select the **Type** of field from the dropdown list
    (a) Text – Lets users enter single words and strings of words and number
    (b) Integers – Lets users enter whole numbers only, no letters or symbols
    (c) Date – Lets users select a date
    (d) Date range – Lets users select a start and an end date
    (e) Dropdown list – Lets you provide multiple options for users to choose from
        - When you select this field type click the **Add** button on the right-hand side of the screen for each option you want to add.
        - Click on the x next to the box to delete an item.

    (f) Tree – Rather than confusing users with a long list of items to choose from, using a tree to structure the options makes it easier for them to find the item they need. See: Use a tree to structure categories and sub-categories
    (g) Document – Lets users upload a document
    (h) Person – Lets users select from a list of all other users on the system.
    (i) RedAmberGreen status (RAG) – Automatically generates colour-coded indicators based on the values of other data fields. See: Add a status indicator to a record
    (j) Calculated value – Lets you automatically generate values based on other fields. See: Automatically calculate values for a field
    (k) Record from other data sheet – Lets you provide multiple options for users to choose from, which are populated from another data sheet.
        - When you select this field type select the other data sheet from the right-hand side of the screen.
        - Tick the columns you wish to the user when displaying the options.

6. Once you have selected the field type and completed the relevant options for that field you can add a **Description** which all users will see displayed next to the field.
7. You can also add **User help text**. This is displayed when a user clicks on the question mark (?) next to the field name.
8. Tick the box if you want the field to be optional.
9. Click **Save** to create the new data field.
10. Under **Permissions** set which user groups can view and edit this data field by clicking on the **Add new group** button. You must add at least one user group here, otherwise the field will be invisible to all users. For more information see Set permissions for data fields.

5.2 SET PERMISSIONS ON A DATA FIELD

By using the Linkspace groups functionality, you can set who can view, add, edit or approve changes to specific data fields according to the user group(s) they belong to. For each data field you can specify what members of each user group are allowed to do on that field.

To set permissions on a data field, there are two steps:

The first step is to set up your groups.

1. Click the **Admin** tab in the top navigation.
2. Select **Manage Groups** from the dropdown menu.
3. Click the **Create new group** button.
4. Give the group a name and click **Save**.

> *NOTE: When you set up a new user you should allocate them to one of the groups you have created. If they are not allocated to a group, they will not be able to see or edit any data fields on which you have set group permissions.*

Then you need to set the groups' permissions on the data field.

5. Add a new data field.
6. Under **Permissions** on the data field screen, click **Add new group**.
7. For each new group you can select what users of that group can do on that field i.e. Read values; Enter values for new records; Edit values of existing records; Approve values in new records; Approve changes in existing records; Enter values for new records without requiring approval; Edit values of existing records without requiring approval.
8. Click **Save**.

> *NOTE: If you do not define the permissions for a group on a data field then it will automatically hide that field from everyone in that group.*

5.3 CONTROL WHEN A FIELD IS DISPLAYED

You can choose to hide or display a field on the New record or Edit record screen according to the value of another field. This can make your New/Edit record screen less overwhelming, by only showing fields that are directly relevant.

To do this, tick the box next to **Only display under the following conditions** when you are adding a new field. In the first box, select the field on which your condition is based. In the second box, enter the required text of an exact match, or use a Regular Expression for any other type of match. For example:

For an exact match	Enter the text you want to match
To match any non-blank value	.+
To match any of three values e.g. "val1", "val2" or "val3 (comment)":	(val1|val2|val3 \(comment\))
To match a value containing the word "foo"	.*foo.*
To match anything beginning with "bar"	bar.*
To match any number	[0-9]+

5.4 AUTOMATICALLY CALCULATE VALUES FOR A FIELD

You can create a **Calculated value** data field to automatically generate values based on other fields.

1. Add a new data field and give it a name.
2. Select **Calculated value** as the **Type** of field.
3. In the **Return value conversion** dropdown box, select whether the final value will be text, a date, a number or an integer.
4. In the **Calculation** box, use the Basic Perl programming style to return the value of the calculated field. To reference another field insert the field name in square brackets and the value(s) of the field in inverted commas. For example if you wanted to create an automatically generated Continent field that depended on the value in the Country field, you might use the following:

```
if ([Country] eq "Greece") {
    return "Europe"
} elsif ([Country] eq "Japan") {
    return "Asia"
}
```

   You can also reference the ID of the record instead of a specific field by using id. For example

```
if ([id] < 20) {
    return "Early phase project"
} else {
    return "Phase 1 project"
}
```

   If you wanted two or more criteria to apply for a specific value to be returned in your Continent field you might use the following:

```
if ([Country] eq "Greece" && [Region] eq "A") {
    return "Out of area"
}
```

   You can set criteria on values in date ranges by adding the suffix ".from" or ".to" to the field. For example, if you had a planning phase (field name: "Planning phase") on every project, and you wanted to show which projects were currently doing their planning (i.e. where today's date falls within that date range) you might use the following:

```
if ([Planning phase.from] > CURDATE) {
    return "Started"
}
```

   Or, if you wanted to return a value for the calculated field based on it being greater than or less than the amount specified in the data field named Cost, you might use:

```
if ([Cost] < 10) {
    return "Bargain"
}
```

   You can also return a value based on the sub-category of a tree. For example: you have a field called Countries, which you set up as a tree listing all the countries under each continent.

In this example, all the continents would be level 2 nodes in the tree, and all the countries would be level 3 nodes. If you wanted to return a value based on the continent, rather than the country that had been selected you could specify this by referring to the value at level2.

```
if ([Countries.level2] eq "Africa") {
    return "Zone B"
}
```

5. Click **Save** to create the new data field.

5.5 USE A TREE TO STRUCTURE CATEGORIES AND SUB-CATEGORIES

If you have a number of categories and sub-categories that you want users to choose from in a data field, setting it up as a data tree makes it easier for people to find what they're looking for, and eliminates spelling errors.

1. Add a new data field and give it a name.
2. Select **Tree** as the **Type** of field.
3. Tick the **Only all end-nodes to be selected** if you want users to be able only to select the final sub-categories in the tree and not higher-level categories.
4. Each item in the tree is referred to as a node. Similar to a folder structure on your computer, you create top-level nodes and can then nest other nodes underneath these. To start click the **Create** button under the **Node selection** box.
5. To add a node underneath another node, select the node you want as the parent and click **Create** again.
6. To rename or delete a node, select it and click on either the **Rename** or **Delete** button.
7. Set the permissions for the field and click **Save** to create the new data field.

5.6 ADD A STATUS INDICATOR TO A RECORD

You can create a **RedAmberGreen indicator field** to automatically generate colour-coded indicators based on other fields. The conditions for the red, amber and green indicators will always be checked in that order. If a record meets more than one of the conditions, it will show the red over the amber or the green.

1. Add a new data field and give it a name.
2. Select **RedAmberGreen (RAG) status** as the **Type** of field.
3. Use Basic Perl programming style to stipulate the conditions for red, amber and green indicators to be displayed. If none of the conditions match, the field will be grey.

   Values from other fields are used by inserting the field name between square brackets, whilst "CURDATE" can be used to insert the current date.

   For example, if you wanted a green indicator for projects where the start date was in the past you might use:

```
[Start Date] {\textless} CURDATE\newline
```

Or if you wanted a red alert where a project was over budget you might use:

```
[Cost to date] > [Budget]
```

4. Set the permissions for the field and click **Save** to create the new data field.

5.7 CHANGE THE ORDER OF THE FIELDS

Any changes you make to the order of the fields will affect all your users.

1. Click the **Admin** tab in the top navigation and select **Data Layout** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to add, edit or delete data fields.)
2. Drag and drop the fields to reorder them.
3. When you are finished click **Save order**.

5.8 EDIT A FIELD

1. Click the **Admin** tab in the top navigation and select **Data Layout** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to add, edit or delete data fields.)
2. Click the **Edit** link next to the name for the field you want to change.
3. Make your changes and click **Save**.

5.9 DELETE A FIELD

1. Click the **Admin** tab in the top navigation and select **Data Layout** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to add, edit or delete data fields.)
2. Click the **Edit** link next to the name for the field you want to change.
3. Scroll down to the bottom of the Edit data field screen and click the **Delete button**.
4. To confirm you want to delete the field, click the **Delete** button in the pop-up box that appears on your screen. **IMPORTANT: Once you delete a field you will lose all the data stored in that field**.

6. PERMISSIONS: Setting permissions

Linkspace enables very fine control over exactly what data users can add, delete, view and update. You control what users are able to do and see on the Linkspace system in two ways:

1. You control what data fields they can view, edit and approve changes on via their membership of user groups – See: Set permissions on a data field.
2. You control everything else they can do on the system (i.e delete records, download data, manage user accounts, administer layouts, views and graphs, etc. via their individual user permissions – See: Set the permissions for a user).

7. USER GROUPS

7.1 SET UP A NEW USER GROUP

1. Click the **Admin** tab in the top navigation.
2. Select **Manage Groups** from the dropdown menu.
3. Click the **Create new group** button
4. Give the group a name and click **Save**.

> *NOTE: There are no system-wide field permissions associated with groups. You need to specify the permissions that each group has for each data field. You can see an overview of a group's permissions across all fields by going to Ad-min > Manage Groups*

7.2 DELETE A USER GROUP

1. Click the **Admin** tab in the top navigation.
2. Select **Manage Groups** from the dropdown menu.
3. Click the **Edit name** link next to the group you want to delete.
4. Click the **Delete** button and then **Confirm deletion** on the pop up box.

8. GRAPHS: Set up

8.1 CREATE A NEW GRAPH

Only users with permission to configure the system itself can create graphs. Other users can control the data that is included in the graphs through creating personalised views of the data. See: View data as a graph

1. Click the **Admin** tab in the top navigation and select **Graphs** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to add, edit or delete data fields or graphs.)
2. Click on **Create new graph**.
3. Provide a title and a description of your graph.
4. Select the **Type** of graph: Bar, Line, Donut, Scatter or Pie
5. Define the data fields and values for your graph.
6. Select a field for the **X-axis** from the dropdown list. This defines the set of values to use for the x-axis (horizontal axis) for a bar, line or scatter graph. For a donut or pie graph, this defines each segment within a ring. The x-axis label will automatically be the name of its defined data field. It's also possible to select all <All fields in view>, which will show each field in the view as a point on the x-axis. This option is only really applicable when summing fields (see below); a count will produce a flat graph across all points.
7. The **X-axis grouping** is optional and only relevant to date fields. It lets you group the values that are returned for the x-axis according to day, month or year.
8. From the dropdown list, select the field to use for your **Y-axis field**. This defines the field to use for the y-values (vertical axis) of a graph. You can ignore this step if you are using a donut or pie graph, or if you want your y-axis to show a total count for each value that appears in the X-axis field.
9. In the **Y-axis values** box you must choose whether you want the graph to show the total sum of a particular field (for numeric values only), or count the number of times each value appears.
10. If you are using a bar, line or scatter graph, provide a **Y-axis label**.
11. The **Group by field** is optional. This lets you group related data items. For example, if countries were being displayed on the graph, this option could be used to group (and colour code) by continent. In the case of a donut graph, this defines the rings. Otherwise, the data being displayed is normally a smaller subset of this grouping option.
12. Select a set of metrics if you want your values to be converted to percentage values compared against a set of fixed values. See the metrics section for more information.
13. Select **Stack data** if you want different data items for the same x value to be stacked on top of each other, rather than displayed side-by-side
14. Select **Add graph to all users** if you want the graph to be displayed in the graph view for all users.
15. Click the **Save** button at the bottom of the screen.

8.2 EDIT A GRAPH

1. Click the **Admin** tab in the top navigation and select **Graphs** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to edit graphs.)
2. Click on the **Edit** link next to the graph you wish to edit.
3. Make any changes and click the **Save** button at the bottom of the screen.

8.3 DELETE A GRAPH

1. Click the **Admin** tab in the top navigation and select **Graphs** from the drop-down menu. (If you can't see the **Admin** tab, then you do not have the permissions to edit graphs.)
2. Click on the **Edit** link next to graph you wish to edit.
3. Click the **Delete** button at the bottom of the screen.
4. To confirm you want to delete the graph, click the **Delete** button in the pop-up box that appears on your screen.

9. METRICS: Compare graphs against absolute values

Metrics enable a graph's values to be converted into percentage values, measured against pre-defined values. For example, a graph might have y-axis values of 20, 40 and 50. These could be plotted against metrics of 40, 40 and 200 (which might be targets). In this case, the graph values would be converted to 50%, 100% and 25%.

9.1 CREATE A SET OF METRICS

One set of metrics consists of several points to plot a graph against. Only users with permission to configure graphs can create metrics.

1. Click the **Admin** tab in the top navigation and select **Metrics** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to add, edit or delete data fields or graphs.)
2. Click on **Create new metric**.
3. Provide a name for the metrics.
4. Click **Create**.

9.2 ADD DATA POINTS TO A METRIC SET

1. Click **Edit** next to the name of the relevant metric set.
2. To add a metric point, click **Add Item**.
3. To edit an existing metric point, click **Edit** next to the item.
4. For each metric point, enter the x-axis value that the metric applies to. The value must be exactly how it is shown on the graph. Also enter the y-axis value that the graph's value should be ccompared against. Optionally, enter a y-axis grouping value, if the graph in question has a y-axis grouping set (thereby having more than one value per x/y coordinate).
5. Click the **Save** button.

9.3 DELETE A METRIC GROUP

1. Click **Edit** next to the name of the relevant metric set.
2. Click **Delete group**.

9.4 REMOVE A DATA POINT FROM A METRIC SET

1. Click **Edit** next to the name of the relevant metric set.

2. Click **Edit** next to the item.
3. Click **Delete**.

10. MESSAGES: Emailing other users

10.1 EMAIL ANOTHER USER FROM LINKSPACE

If the names of other users are included in your data records as a person field, you can access their email address by clicking on their name in the record. If you have an email client installed on your device you can then click on the email address to create a new email message addressed to that user.

10.2 EMAIL A GROUP OF USERS

Linkspace makes it easy to message a group of users that appear in a person field. For example, if your record has a person field called Project leaders, you can email all the project leaders simply by clicking on the envelope icon at the top of the Project leaders column.

What makes it more powerful is that you can filter the list according to certain criteria and then use the same action to message all project leaders whose projects meet those criteria.

For example, if you wanted to email all of the project leaders whose projects had budgets over `£10,000`, you would use a filter to view only those projects where [Budget] greater `10000`. In that view you can then click on the envelope icon at the top of the Project leaders column to email the leaders of only those projects.

11. LOGIN: Managing your account details

11.1 CHANGE YOUR PASSWORD

Linkspace does not allow you to set your own password, but you can ask the system to generate a new one for you. If you are already logged in:

1. Click on **your name** at the top of the screen
2. Select **My details** from the dropdown menu
3. Click on the **Change password** button at the bottom of the screen.
4. Enter your current password in the text box on the pop-up screen and click on the **Generate new password** button.
5. Your new password will be displayed on the screen.

11.2 REQUEST A NEW PASSWORD

If you have forgotten your password

1. Click on the **Reset password** link on the login page
2. Enter your email in the text box in the pop up screen.
3. Click **Submit**
4. You will be emailed a link to reset your password.

11.3 EDIT YOUR PERSONAL DETAILS

1. Click on **your name** at the top of the screen
2. Select **My details** from the dropdown menu
3. Make you changes and click on the **Save** button at the bottom of the screen.

> *NOTE: If you change your email address this will become your new username when you log in.*

12. USERS: Managing users

12.1 ADD A NEW USER TO THE SYSTEM

1. Click the **Admin** tab in the top navigation and select **Manage Users** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to add, edit or delete users.)
2. Click on **Create user**.
3. Complete the new user form and click **Save**.

> **Tip:** It is possible for Linkspace users to request an account through your Linkspace login screen. If this functionality is enabled on the system, direct users to your login URL. You will be alerted to any new account requests.

12.2 SET THE PERMISSIONS FOR A USER

You can set permissions for each user on the system. If a user has no permissions they can only view data, and add and remove the graphs displayed on their personal page. To set user permissions:

1. Click the **Admin** tab in the top navigation and select **Manage users**.
2. Click on the **ID number** of the user you wish to edit.
3. Use the tick boxes under the Permissions section to set what the user is able to do.
4. Click **Save**.

NOTE: Permissions explained

User can delete records	This permission allows a user to permanently delete records, including their version history
User can manage other user accounts	This permission allows a user to manage user accounts on the system, including the configuration of permissions
User can download data	This permission allows a user to download data in CSV format
User can administer layout, views and graphs	This permission allows a user to configure the system itself, including the configuration of the layout and graphs, and the creation of global views
User can send messages	This permission allows a user to send messages to users, using the messaging capability in the tabular data view
User can create, modify and delete views	This allows a user to create, modify or delete views. Unless the user has the administer layout permission, the views can only be personal views.

12.3 APPROVE A NEW USER

If you are an administrator responsible for approving new users you will receive an email alert when a new user requests a user account. To approve the request:

1. Click the **Admin** tab in the top navigation and select **Manage Users** from the drop-down menu. (If you can't see the **Admin** tab, then you do not have the permissions to add, edit or delete users.)
2. New Account requests are displayed below the list of Active accounts.
3. Click on the **ID** of the user you wish to approve.
4. Click **Approve** to activate the account.

12.4 EDIT USER DETAILS

1. Click the **Admin** tab in the top navigation and select **Manage Users** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to add, edit or delete users.)
2. Click on the **ID** of the user you wish to edit.
3. Change the details as required and click **Save**.

13. APPROVAL: Approving changes

If there are any new records or edits that require approval any user with the authority to approve changes will be able to see this immediately when they login. The number of records requiring approval will be shown in brackets next to the Approval tab in the top navigation.

13.1 APPROVE A CHANGE

1. Click the **Approval** tab in the top navigation. (If you can't see the **Approval** tab, then you do not have the permissions to approve changes or new records.)
2. You will see a list of all the records requiring approval.
3. Click on the record **ID** to view the record you want to check. If it is a new record, all fields will be displayed on the following screen. If it is a changed record, only the fields that need approval will be displayed.
4. Once you are happy with the changes, click the Approve button at the bottom of the page.

14. SEARCH: Searching for data

14.1 USE THE WILDCARD SEARCH

You can use the search box at the top of the screen to find specific records. If you want to search across all fields but are not sure of the exact spelling or full term used, you can use the wildcard function. Use the * to indicate that what you've typed is only a part of what you are looking for.

For example, if you wanted to find a specific project, but didn't know the full project name, you could type the part you do know inside two *s – i.e. *Training*. The search will return all records where there is a reference to training in the project name, or in any other field. Results will be shown in accordance with the current view (with the filter removed, showing the results of the search instead).

> *NOTE: The search can be run faster when you search using the beginning of something i.e. only using the * at the end. For example if you wanted to search for all countries that start with United, you would type United* in the search box.*

15. Linkspace HOMEPAGE

15.1 CONFIGURING YOUR LINKSPACE HOMEPAGE

You can add text and links to your Linkspace homepage.

1. Click the **Admin** tab in the top navigation and select **General Settings** from the drop-down menu. (If you can't see the **Admin** tab, then you don't have the permissions to add, edit or delete users.)
2. Use the WYSIWIG editor to add and format any text you want to add to your system's home page.
3. Click **Save**.