

SiteScape ICEcore

1.1

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USER GUIDE

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About This Manual

This manual provides getting-started information for new users of ICEcore. It provides a more detailed version (more pictures and explanatory text) of the information provided in the *ICEcore Quick Tips*.

Audience

This guide is intended for all ICEcore users.

Contents of this Manual

This manual provides information about the following:

- ♦ ICEcore concepts and definitions
- ♦ Navigation
- ♦ Getting-started procedures
- ♦ Glossary

Conventions

This manual uses the following conventions:

A greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

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When a single pathname can be written with a backslash for some platforms or a forward slash for other platforms, the pathname is presented with a backslash. Users of platforms that require a forward slash, such as Linux or UNIX, should use forward slashes as required by your software.

What you see	What it means
Click the <i>Add toolbar</i> item.	References to toolbar items, links, menu items, and buttons are presented in <i>italic</i> font.
Click the <i>Getting Started</i> link.	
Click the <i>Add Document</i> menu item.	
Click <i>Close</i> .	
Type <i>status</i> , then press Enter.	Text that you must type and file names are presented in <i>Courier</i> font.
Open the <i>ManagerGuide.pdf</i> file.	

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Documentation Updates

For the most recent version of the ICEcore Installation and Configuration Guide, visit the [Novell Web site \(http://www.novell.com/documentation/\)](http://www.novell.com/documentation/).

Additional Documentation

You may find more information in the ICEcore documentation, which is accessible from links within ICEcore:

- ♦ ICEcore Help system
- ♦ ICEcore Quick Start Guide
- ♦ ICEcore Installation and Configuration Guide

The ICEcore online documents may be found from within the ICEcore Help system. To access the ICEcore Help system, after logging in (described later in this manual), click the *Help* icon.

In the ICEcore Help system, click the *Getting Started Manuals* link to access copies of the online documents listed above.

Understanding ICEcore

1

ICEcore is *collaboration software* that bridges the gap between teammates working alone at their computers and working together during meetings. It provides spaces and tools for online teaming and conferencing.

This chapter provides overview information about the product and about navigating its pages. If you prefer to “learn by doing,” you may want to begin by reading [the next chapter](#).

This chapter includes:

- ♦ [Section 1.1, “ICEcore is Collaboration Software,” on page 7](#)
- ♦ [Section 1.2, “Navigating ICEcore,” on page 8](#)
- ♦ [Section 1.3, “Using ICEcore Help,” on page 17](#)

1.1 ICEcore is Collaboration Software

Collaboration using ICEcore facilitates online work, creating a “virtual meeting space.”

Here are examples of the increase in team synergy you experience when using ICEcore:

- ♦ You and your teammates can work together without having to be in the same room or working at your computers at the same time. Someone can post a note or document to a folder, and, at their convenience, teammates can comment on the work, review and edit files, and further develop the idea. With ICEcore, teamwork is ongoing and potentially never ending.
- ♦ When you are working online at the same time, the *presence* feature of ICEcore allows you to see which teammates are currently online, and allows you to start a Zon chat session, create an online meeting, make a Skype phone call, and so on.
- ♦ Ideas are formed together, interactively, with your teammates. By the time you hold that meeting in the conference room, the team has already been a part of the formation of the idea, and teammates are more likely to understand it, buy into it, and assist with its implementation. ICEcore becomes a “pre-meeting” meeting.
- ♦ Documents are reviewed earlier in the process, allowing easier modifications and adjustments. ICEcore also makes it easier for more than one person to write a document, because of workflow processes that automate drafting and review, and because of ICEcore access control.
- ♦ Your collaborative process is preserved and publicly accessible in ICEcore. No more searching through email folders in a frantic effort to “catch someone up” on a lengthy email discussion. To review past discussions and decisions, or to review a previous version of a document, use the powerful search capability of ICEcore to locate historical information quickly and easily.
- ♦ Use various ICEcore tools in combination - a milestones folder, tasks, workflow, discussions, chat, online meetings - to track progress against goals for multiple teams working on a large project.

1.1.1 ICEcore is Knowledge Management Software

The out-of-the-box ICEcore tools alone provide powerful enhancements to online collaboration. In addition, enhanced design and use of the workspaces and tools within the product provide additional power that falls under the category of *knowledge management*. This power involves the intelligent development, management, access, and distribution of organizational knowledge.

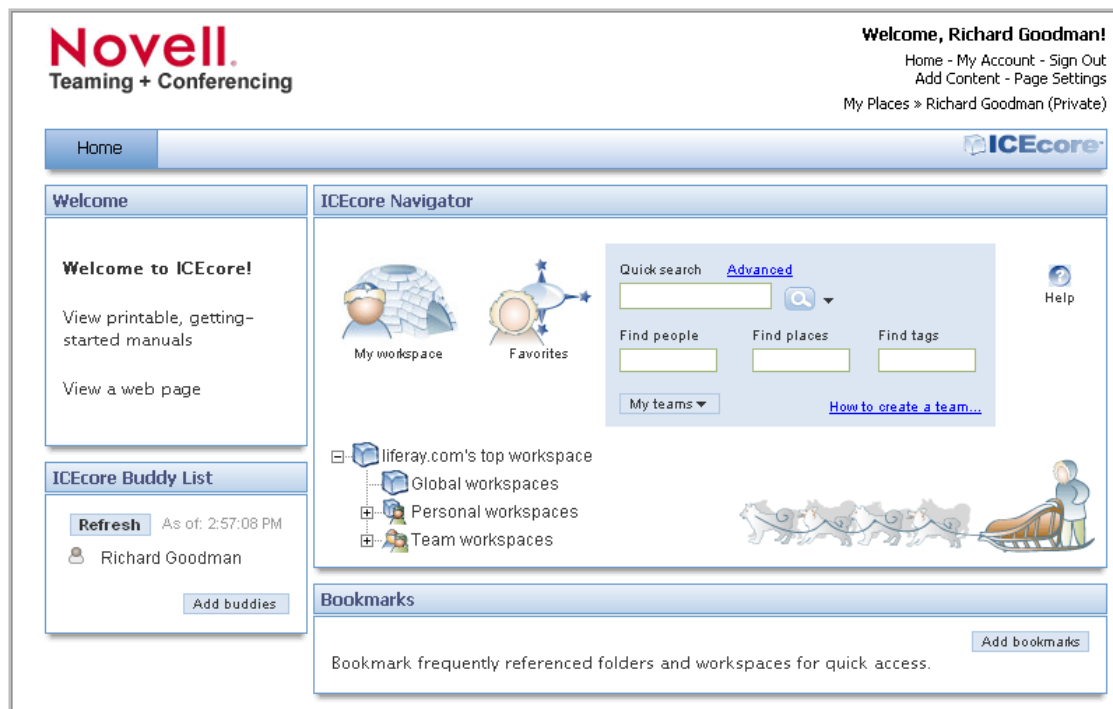
Consider the following examples:

- ♦ When people use their personal workspaces to provide detailed information about themselves, the purpose of the workspace moves beyond merely contact data (phone number, email address, Zon username). It enables searches for various subject-matter experts. Also, ICEcore breaks down search results, telling you which people and folders are most relevant to the items matching your search criteria. It is easy to see pockets of expertise associated with your area of interest.
- ♦ Experts can rate entries in ICEcore using a five-star rating system (one star indicating the least impressive, and five stars being the most impressive).
- ♦ ICEcore provides tools - *wikis* (information coauthored by all participants), *blogs* (chronological journal entries allowing for comments from readers), *workflow* (an online representation of a business process), and *tags* (categorical labels applied to items) — which people can use to create and organize information organically, over time, in ways that map best to the team's natural work style.
- ♦ ICEcore provides work-area snapshots, called *accessories*, that provide a summary snapshot into a potentially large amount of information, highlighting the most relevant information. For example, the accessory can present entries submitted by an expert on a given subject matter, or it can summarize task-completion information by providing a milestones overview.

1.2 Navigating ICEcore

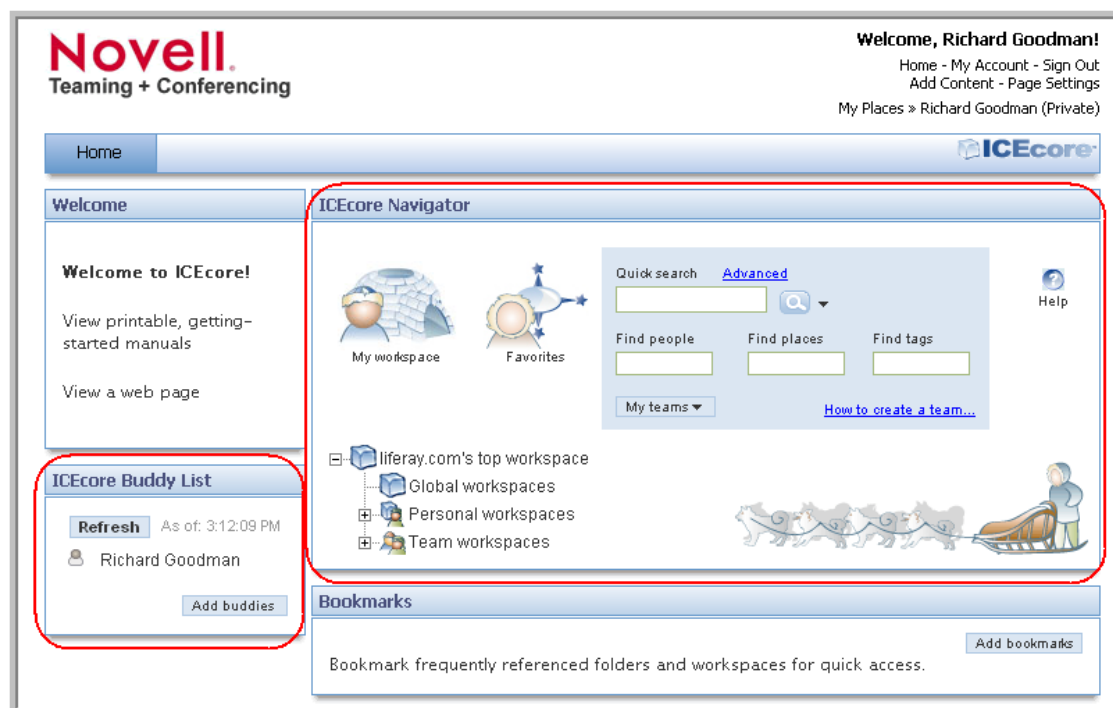
Your administrator provides you with the web address (URL) used to access ICEcore, and your ICEcore username and password.

After you sign in, you see a portal page, as shown on the following page.



A portal page is a web page that presents different applications in subsections within the page. On the Internet, you may have seen pages (for example, Google and Yahoo) that have subsections presenting a weather report that is local to your area, stock quotes that are of interest to you, the local time, and more.

Within the portal page, separate applications can run within sections called *portlets*. The following picture shows two highlighted portlets on the page:

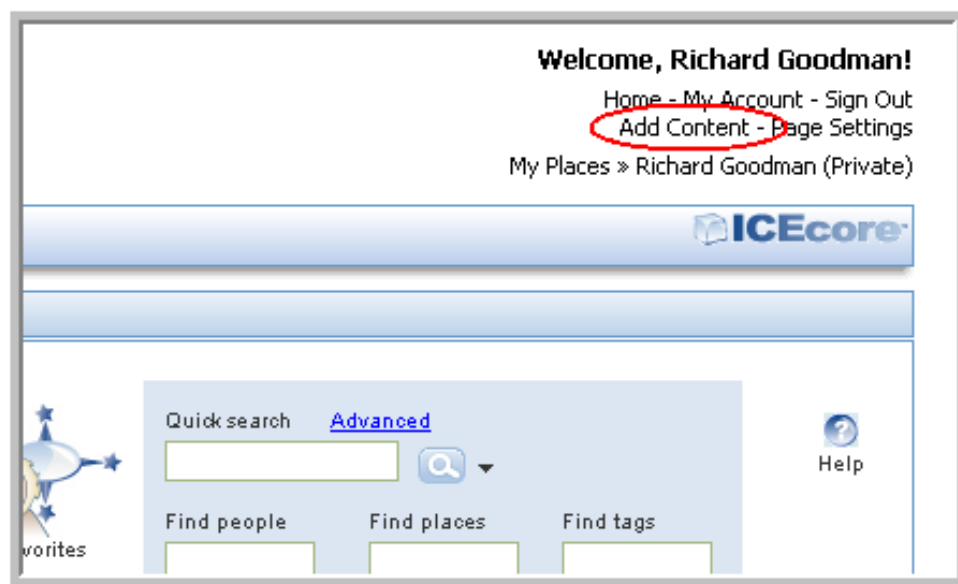


1.2.1 The Default ICEcore Portlets

By default, when you sign in for the first time, ICEcore presents four portlets:

- ♦ **The welcome portlet** — Provides quick access to getting-started PDF manuals or to a getting-started web page.
- ♦ **The navigation portlet** — Gives you quick access to any workspace or folder you want to view in ICEcore, to your personal workspace or to your favorite places, to items that match search criteria, or to get Help for the current page.
- ♦ **The buddy-list portlet** — Displays the presence of people you designate as your buddies, and provides tools you can use to contact your buddies.
- ♦ **The bookmark portlet** — Provides links to important workspaces and folders, and can provide a count of new or changed entries in folders.

ICEcore provides additional portlets that you can add to your portal page. To add another portlet, click the *Add Content* link, as follows:

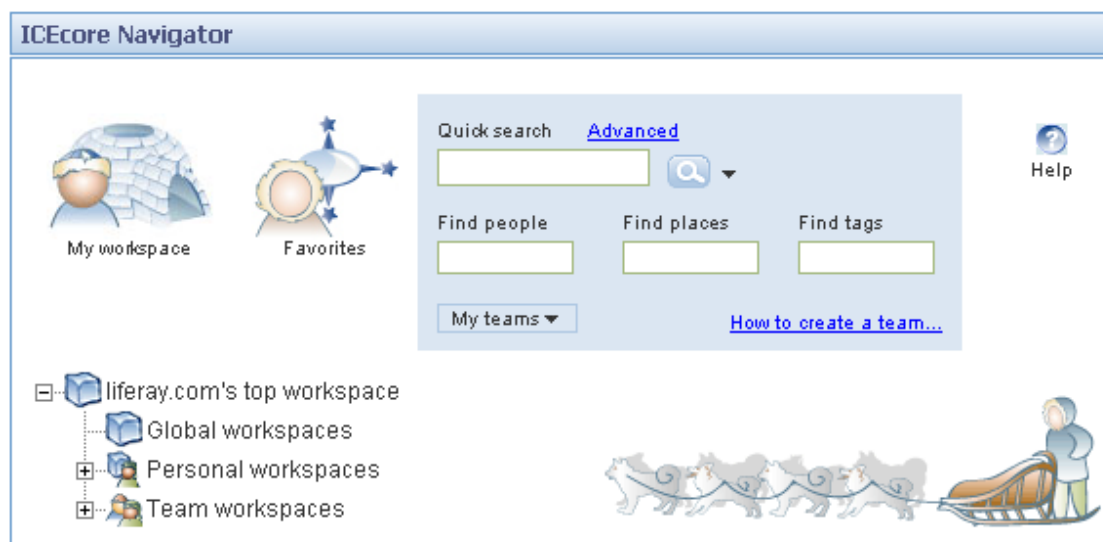


The portal software displays a list of all available portlets. Click the *ICEcore* link to see a list, which includes the non-default ICEcore portlets, as follows:

- ♦ **Blog summary** — Provides a snapshot of journal entries from a blog of your choice within the ICEcore installation.
- ♦ **Guestbook summary** — Provides a snapshot of entries from your choice of ICEcore guest book.
- ♦ **ICEcore administration** — Displays tools for ICEcore administrators.
- ♦ **Photo gallery** — Presents pictures from a your choice of ICEcore photo gallery.
- ♦ **Search** — Presents items, potentially anywhere within ICEcore, that match search criteria.
- ♦ **Wiki home page** — Displays a summary of the home page of an ICEcore wiki forum.
- ♦ **Workspace tree** — Allows you to go to any place you want within ICEcore. (The navigation portlet also contains a workspace tree.)

1.2.2 The Navigation Portlet

Here is a picture of the navigation portlet:



The navigation portlet provides the following tools:

- ♦ **My-workspace icon** — Displays your personal workspace, which contains your contact information, pictures, a personal blog, and much more.
- ♦ **Favorites icon** — Displays a tool you can use to list links to your favorite workspaces and folders, and to access them quickly.
- ♦ **Search** — Allows you to perform different types of searches, either for any times or for specific items (people, places, and *tags*, which are categories that you and your administrators apply to items in ICEcore).
- ♦ **Help** — Provides access to the getting-started PDF books, and provides Help on various sections of the portal page.
- ♦ **My-teams drop-down list** — Lists links to all of the workspaces and folders in which you are designated as being a team member.
- ♦ **Workspace tree** — Allows you to go to any workspace or folder within the ICEcore installation. Clicking a plus sign (+) expands a portion of the tree, and clicking a minus sign (-) hides that portion of the hierarchy.

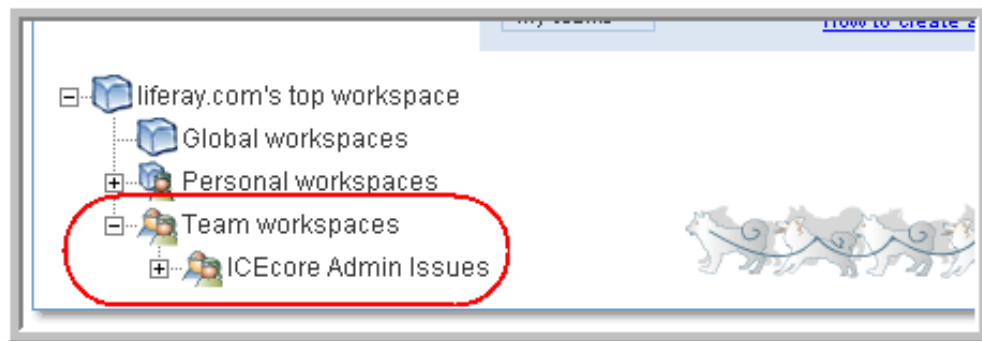
Notice the items in the workspace tree. By default, there are four workspaces in the tree. *Workspaces* are starting places for individuals and teams who want to do a certain type of work. By default, there are four organizational workspaces in the workspace tree: the Workspaces page, and subworkspaces entitled “Global workspaces,” “Personal workspaces,” and “Team workspaces.”

Global workspaces are containers for information available to anyone in your organization. *Personal workspaces* are pages that of personal information (such as contact information, a personal blog, a personal calendar, and more) for everyone in your organization. *Team workspaces* are work areas specific to teams within your organization.

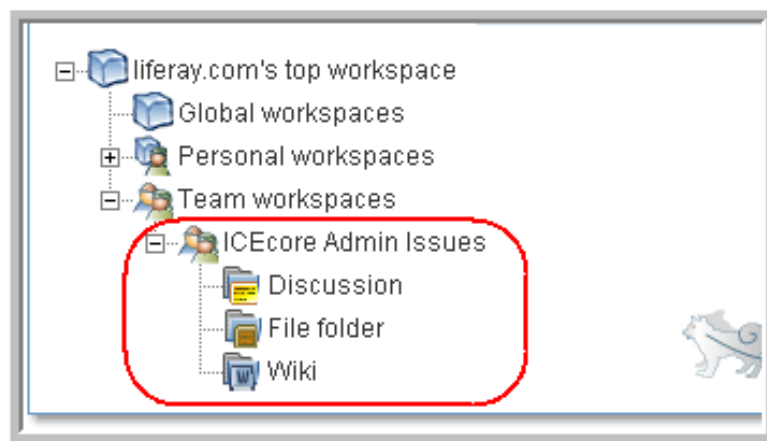
1.2.3 Viewing a Workspace or Folder

There are numerous ways to view a workspace or folder in ICEcore. When getting started, the two most common methods are using the workspace tree or the search tools, both of which are located in the navigation portlet.

For example, you can click on plus sign (+) next to the *Team workspaces* link in the workspace tree to see available team workspaces. Using our sample installation, clicking on the plus sign next to the *Team workspaces* link causes the workspace tree to appear as follows:



The “Team workspaces” workspace contains a single subworkspace, whose title is “ICEcore Admin Issues.” Again, using our example installation, clicking on the plus sign next to “ICEcore Admin Issues” workspace title displays the contents of that workspace, as follows:

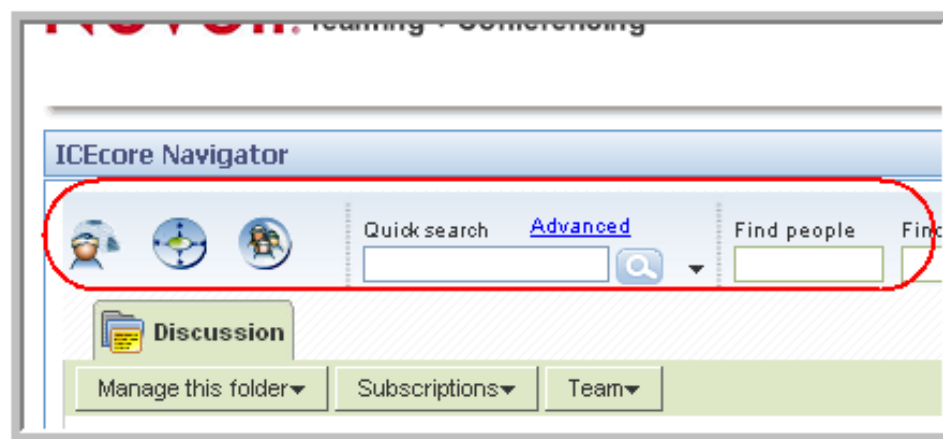


The “ICEcore Admin Issues” workspace contains three folders. Folders can, in turn, contain *subfolders*, which further organize information. None of the folders in the previous picture contain subfolders.

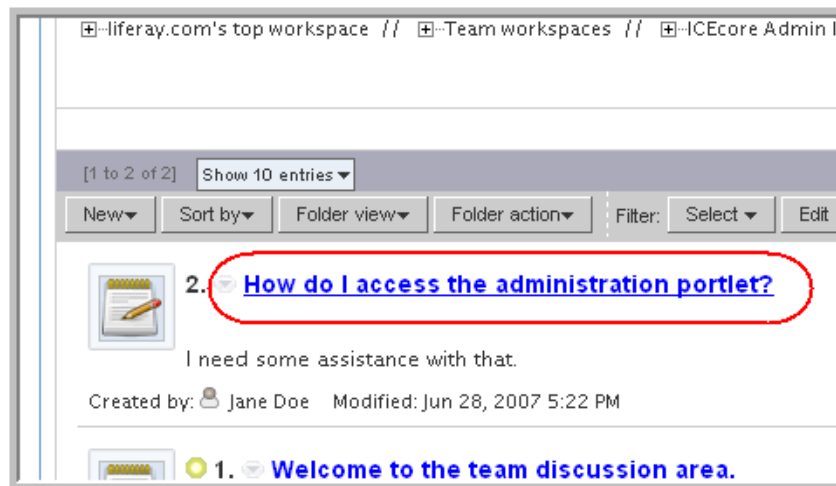
To view a folder, click its linked title. In the last picture, if you click on the *Discussion* link in the “ICEcore Admin Issues” workspace, ICEcore leaves the portal page and displays the Discussion folder in its own page in your browser window, as shown on the following page.



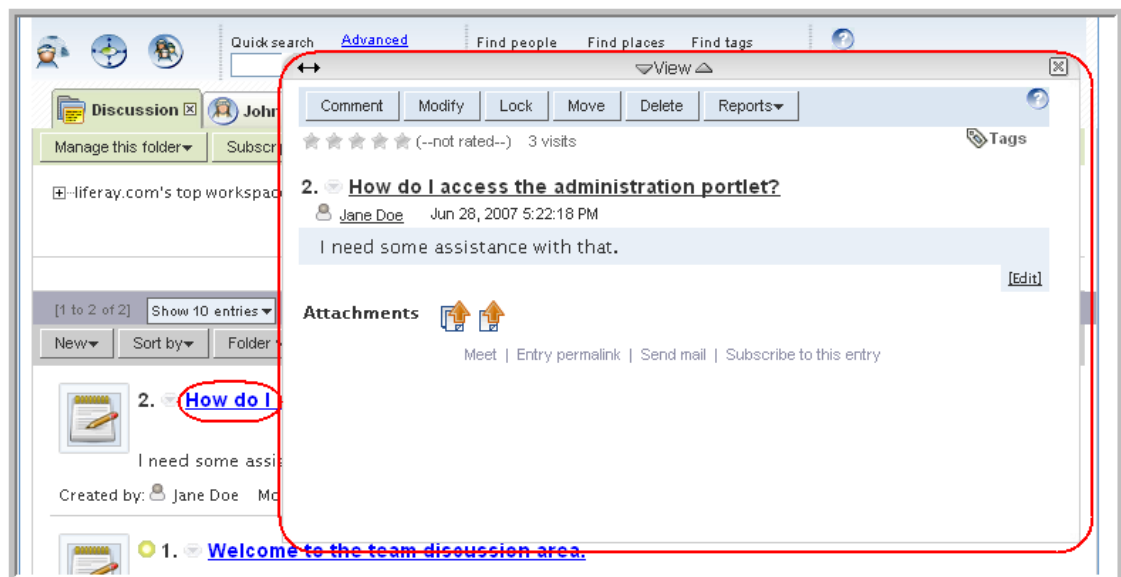
Notice that ICEcore displays most of the navigation-portlet tools at the top of the workspace or folder page:



By default, a folder lists only a summary of the discussion entries. To view the entire entry, click the title of the entry, as shown on the following page.

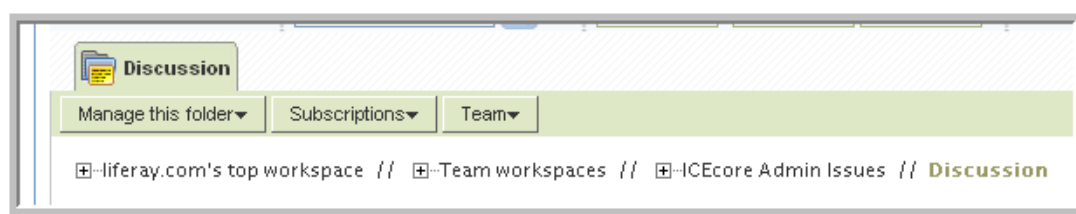


By default, ICEcore displays the discussion entry as an *overlay*, on top of the current page, as follows:

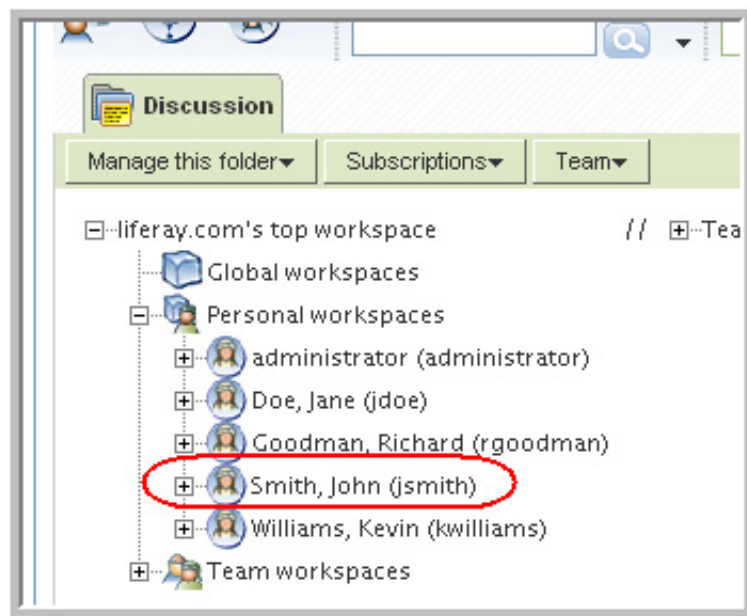


1.2.4 Using Tabs

When displaying workspace and folder pages, ICEcore uses tabs to organize your work. Also, ICEcore also provides quick access from anywhere in the product to any other place. This picture shows the folder tab and the workspace tree:



ICEcore creates a tab that is named using the title of the currently displayed folder (“Discussion”). If you click on items in the workspace tree, ICEcore opens the new place in a separate tab. So, for example, if you click this link:

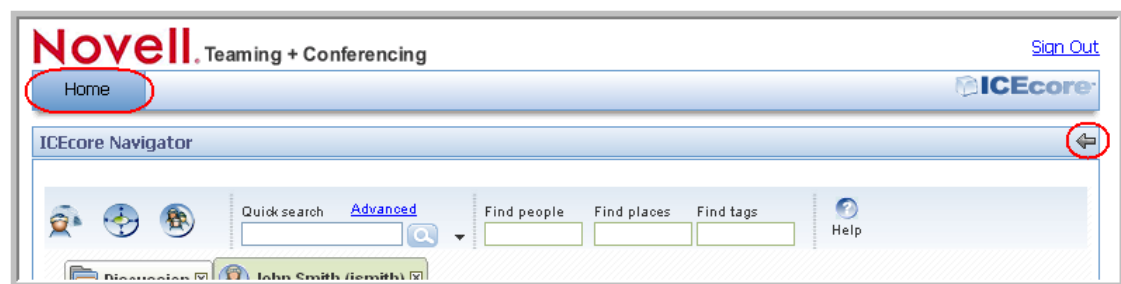


ICEcore displays the personal workspace page in a new tab, as shown in the picture on the next page. To delete a tab, click the Close icon (X) in the upper-right corner of the tab.



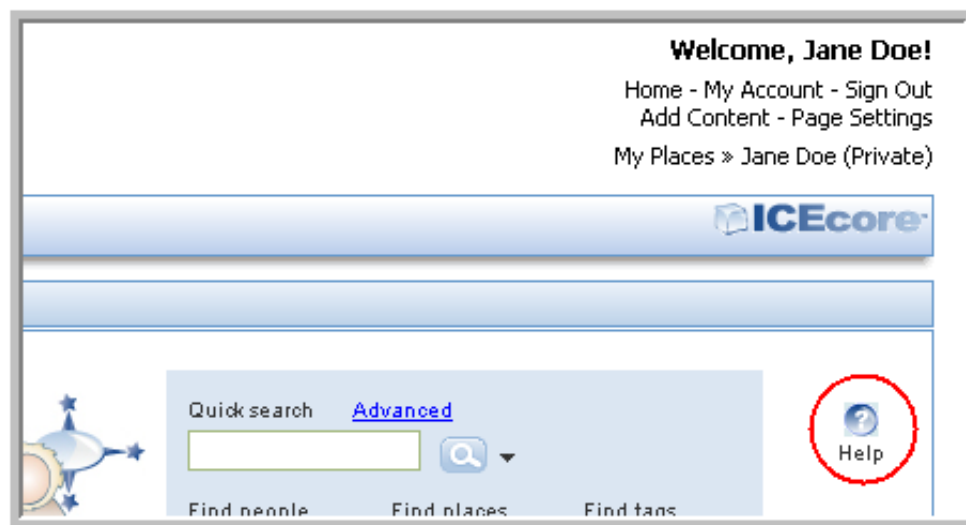
1.2.5 Returning to the Portal Page

To return to the portal page you saw when you first signed in, click either the portal-page home link or the left-arrow icon on the workspace or folder page. In the example, the portal-page home link is "Home," but your administrator may rename it. Consider the following:

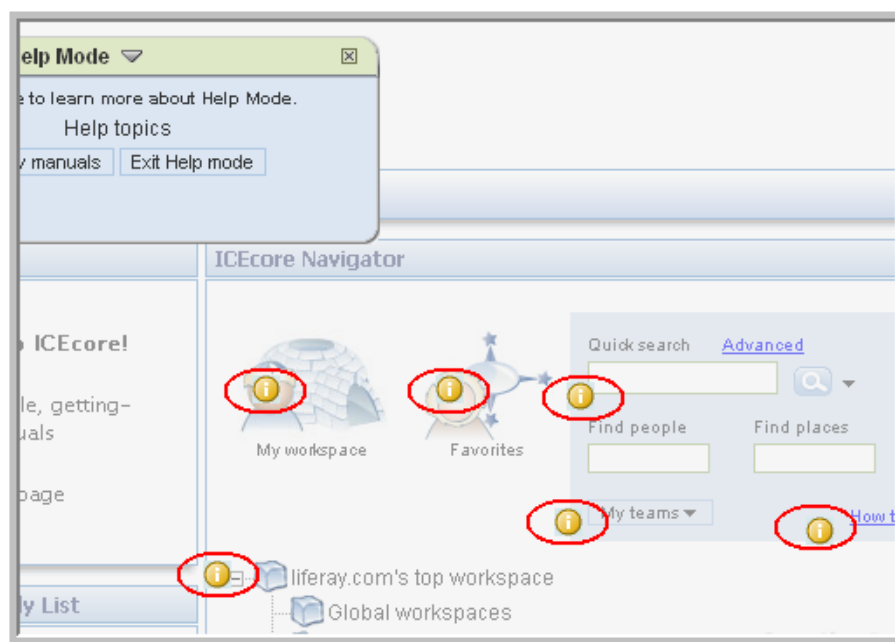


1.3 Using ICEcore Help

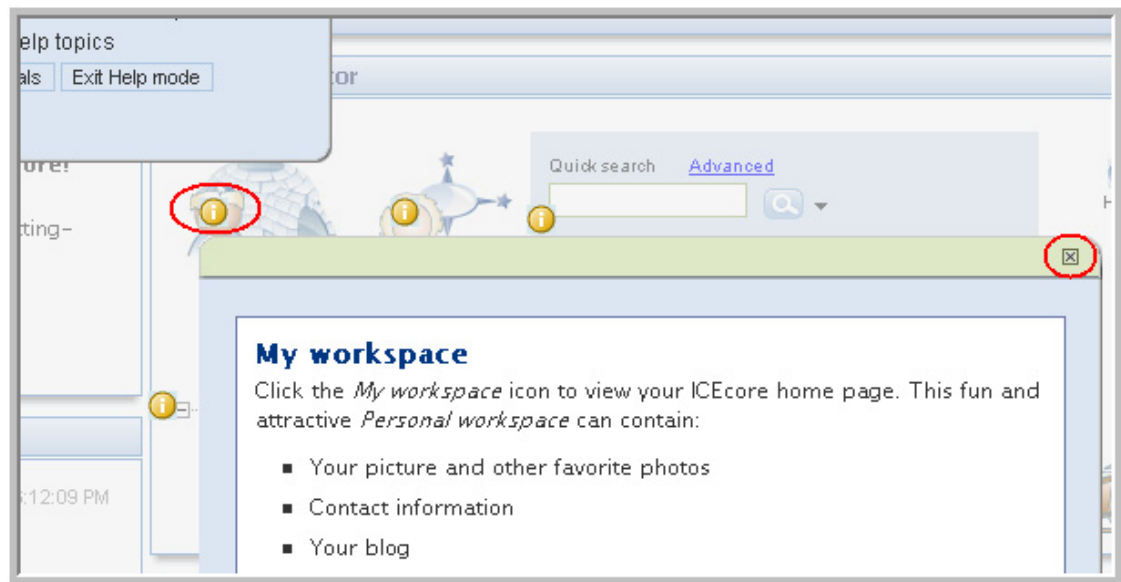
ICEcore has a fun and unique way of helping you to learn about product pages and tools. The portal page and all pages that include the navigation bar include a Help icon, as follows:



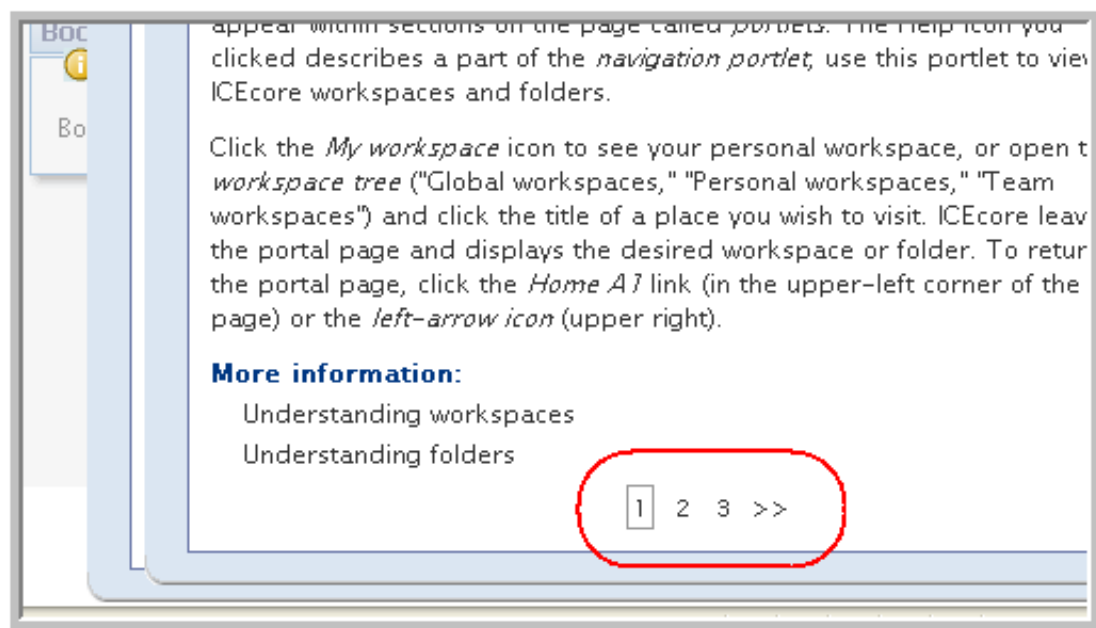
When you click this icon, ICEcore dims the page and presents information icons (*i*) next to each section of that page for which there exists Help information, as follows:



Click the information icon over the portion of the page about which you want more information. When you do, ICEcore displays a panel of information. When you are finished reading the panel, click the Close icon (X) in the upper-right corner of the panel to close it. The picture on the following page shows a panel of Help information and its Close icon.

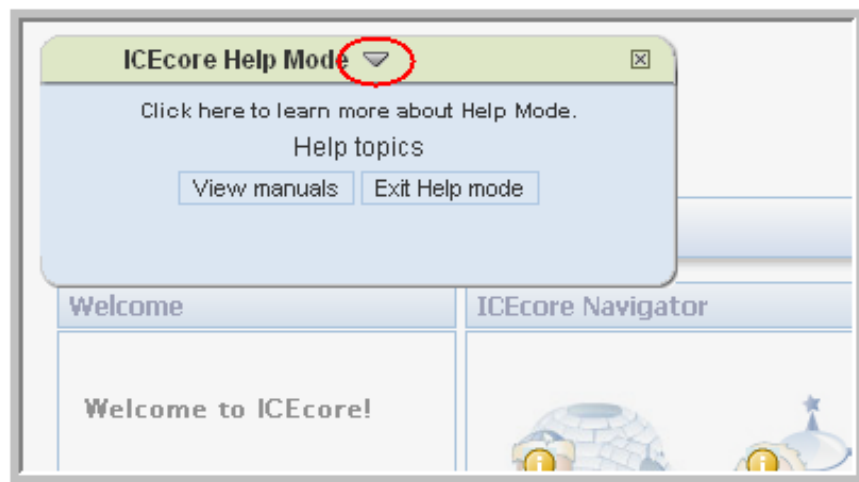


Some Help topics have more than one page of information. To move to and from pages in a Help topic, you can use the linked numbers and arrows at the bottom of the page, as follows:

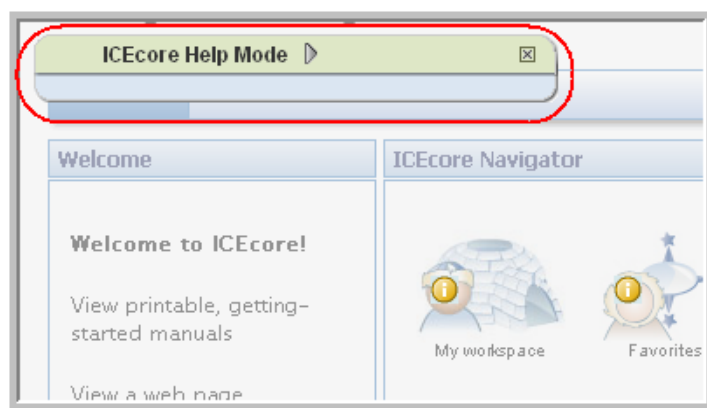


The Help topic in the previous picture has three pages. Either click the number of the page you want to view, or click the double-right arrow to move forward, and the double-left arrow to move backward through the topic.

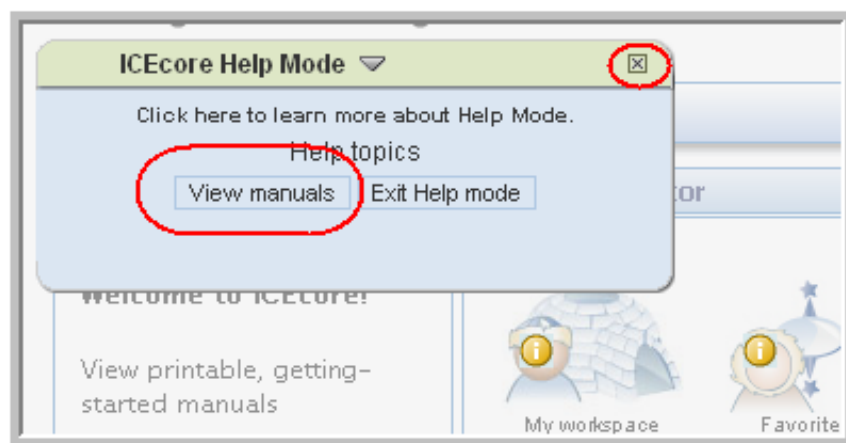
You might find that you want more room on the page to click information icons. If you choose, you can minimize the Help-mode control panel. To do so, click the right-arrow icon, as shown on the following page.



After you minimize the control panel, it appears as follows:



To view getting-started PDF manuals, click *View manuals* in the control panel. To exit Help mode, either click the Close icon (X) in the control panel, or click anywhere on the page other than the control panel or a Help panel. Consider the following:



Getting Started

This chapter provides procedures for new users who are learning how to use ICEcore.

This chapter contains the following information:

- ♦ [Section 2.1, “Set Up Your Buddy List,” on page 21](#)
- ♦ [Section 2.2, “Modify Your Personal Workspace,” on page 22](#)
- ♦ [Section 2.3, “Create a Team Workspace,” on page 26](#)
- ♦ [Section 2.4, “Use Advanced Search to Explore,” on page 28](#)
- ♦ [Section 2.5, “Use the Workspace Tree to Explore,” on page 29](#)

2.1 Set Up Your Buddy List

One of the most powerful tools in ICEcore is the presence icon. This icon tells you whether a person is online or not, and enables quick communication with that person (sending an instant message using Zon, initiating an instant meeting using Zon, sending email, placing a call using Skype, and so on).

To take advantage of the presence indicator, you can set up the buddy-list portlet, so that you see presence indicators for your buddies as soon as you sign in.





To set up your buddy list, do the following:

1. Sign in with your username and password.
2. Locate the ICEcore Buddy List portlet.
If you do not see the portlet, click *Add Content* in the upper-right corner of the portal page, click *ICEcore*, click *ICEcore Buddy List*, and click *Finished*. ICEcore adds the buddy-list portlet to the portal page. If you require more assistance, see your ICEcore administrator.
3. In the portlet, click *Add buddies*.
ICEcore displays the “Configure buddy list” page.
4. Begin typing the first few letters of either the first or last name of a buddy, and then click their linked name in the drop-down list.
ICEcore includes the “type to find” feature. As you type characters in some of the text boxes in the product, ICEcore displays a list of items (in this case, people) that match what you have typed so far. As you type, ICEcore adjusts the list to continue matching as you type.
5. Click *Apply*.
6. Repeat Step 4 as often as necessary to add all of your buddies.
7. Click *Closed*.

ICEcore displays your buddies in the buddy-list portlet, with a presence icon next to each name. To remove a buddy from the portlet, follow the same steps, view the “Configure buddy list” page, and click the Delete icon (*X*) next to the buddy whose name you want to remove from the portlet.

To ensure that the buddy-list portlet is showing you the most up-to-date presence information for your buddies, click *Refresh* in the portlet.

Tips for using buddy lists

- ◆ Here are the descriptions of the presence icons:
 -  Online
 -  Away (recently online)
 -  Offline
 -  Status unknown
- ◆ To communicate with a buddy, click the presence icon and select a communication method.
- ◆ To view a buddy's personal workspace (which includes contact information), click the linked name of your buddy.

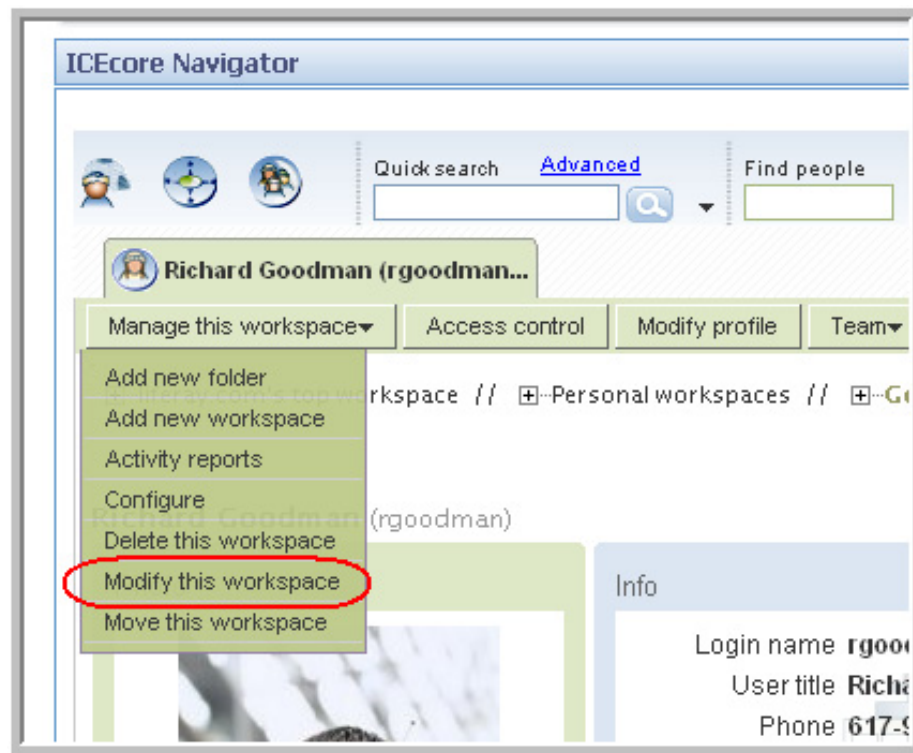
2.2 Modify Your Personal Workspace

As your next step, create a fun personal “home” page within ICEcore.

2.2.1 Add Basic Information

To edit and add contact information and other basic information, do the following:

1. On the portal page, click the “My workspace” icon in the navigation portlet.
2. Click *Manage this workspace > Modify this workspace*.



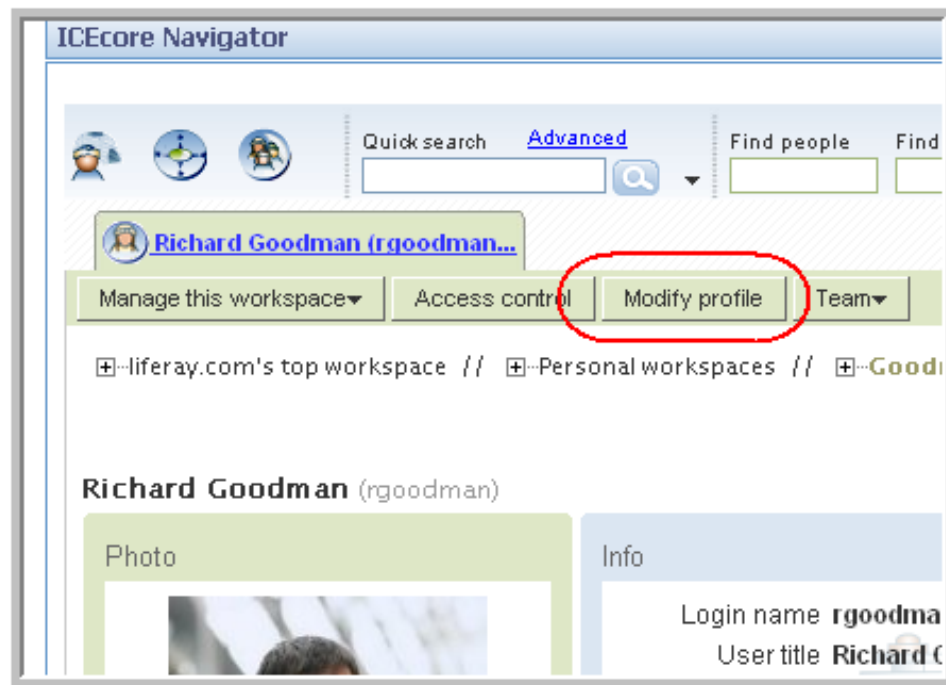
ICEcore displays a form that allows you to add a personal description to your personal workspace. Consider composing a welcome message for those visiting your page. You can also select a different icon for display in the workspace tree next to the link for your personal workspace tree.

3. Click *OK*.

2.2.2 Edit Contact Information and Add Pictures

Do the following:

1. Click the *Modify profile* button, as shown on the next page.

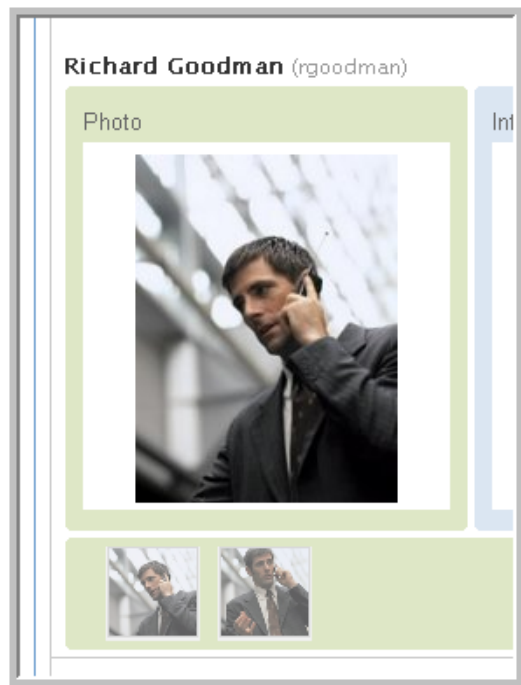


ICEcore displays a form that allows you to alter contact information and upload pictures.

2. Alter any contact information that is missing or incorrect.
3. Click the *Browse* button to upload a picture.

ICEcore places the filename of the picture in the “Current pictures” section of the page. Repeat this step until you have uploaded all the pictures you want into your personal workspace.

ICEcore displays the first picture in your list as the main picture in your personal workspace, and displays all other pictures as *thumbnails* (smaller versions) in a bar below the contact information, as follows:

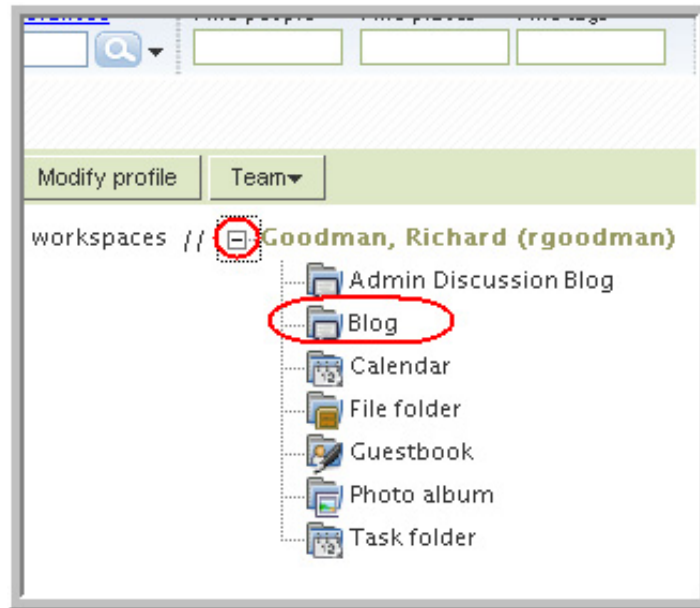


Tips for uploading images

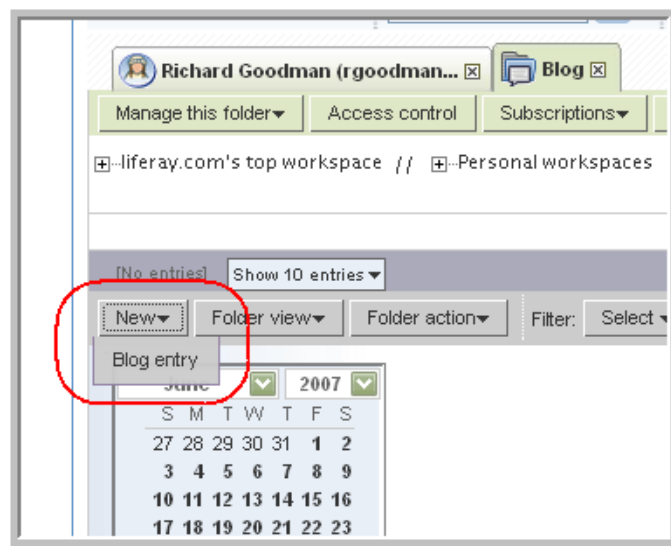
- ♦ You may add as many pictures as you like, but you must add them one by one.
- ♦ On the form used to upload pictures, click the up-arrow and down-arrow icons to move the picture up or down in the list.
- ♦ When viewing any personal workspace, move your cursor over the thumbnail pictures in the bar below the contact information, and ICEcore displays that picture as the main picture in the contact-information section.
- ♦ Click any of the pictures in the personal workspace, and ICEcore displays a full-size version of that picture.
- ♦ To delete a picture, view the form used to upload pictures, check the box next to the picture or pictures you want to delete, and click *OK*.

2.2.3 Add a Blog Entry

1. View your personal workspace page.
2. In the workspace tree on your personal-workspace page, click the plus sign (+) next to your name.
3. Click *Blog*, as shown in the picture on the following page.



4. Click *New > Blog entry*.



5. Provide a title, and type your journal entry in the Description section.
6. If you choose, you can click *Browse* to upload a picture in the Attachments section of the form.
7. Click *OK*.

2.3 Create a Team Workspace

The sections that follow provide instructions for creating a team workspace.

2.3.1 Ask Your Administrator for a Group Name

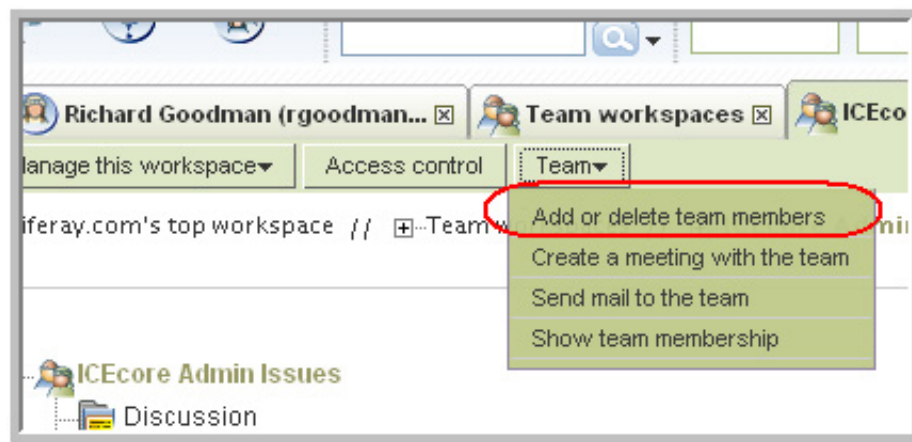
Although it is possible to create your team workspace by specifying the names of all team members individually, ask your administrator to create a group name for your team. This facilitates the team-creation process.

2.3.2 Create the Workspace

1. From the portal page, in the workspace tree, click *Team workspaces*.
2. Click the *Add a team workspace* button.
3. Provide a title for your team workspace.
4. In the “Team members” section, click the “Find groups” text box, type the first few characters of the group name that your administrator created for you, and click the linked group name.
5. In the “Workspace folders” section, click the check box next to the folders you want to have present when ICEcore creates the team. (As the owner of this team workspace, you are able to add more folders after workspace creation as well.)
6. If you choose, you can provide an announcement to be sent to your team members.
7. Click *OK*.

2.3.3 Create the Team

1. View your team-workspace page.
2. Click *Team > Add or delete team members*.



3. In the “Find groups” text box, type the first few characters of your team’s group name, and click the linked name.
4. Click *OK*.

2.3.4 View Team Members

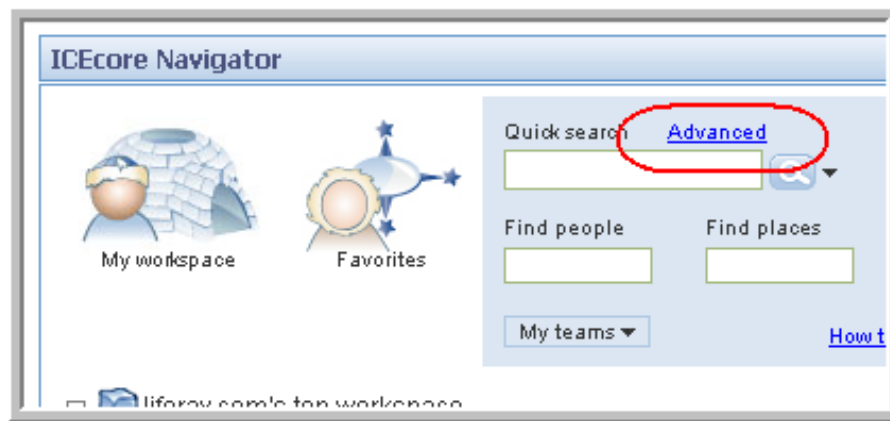
By default, ICEcore includes a team-membership accessory at the top of your workspace page, which shows you the current team membership. If this accessory is not present, do the following to view the team membership:

1. View your team workspace.
2. Click *Team* > *Show team membership*.

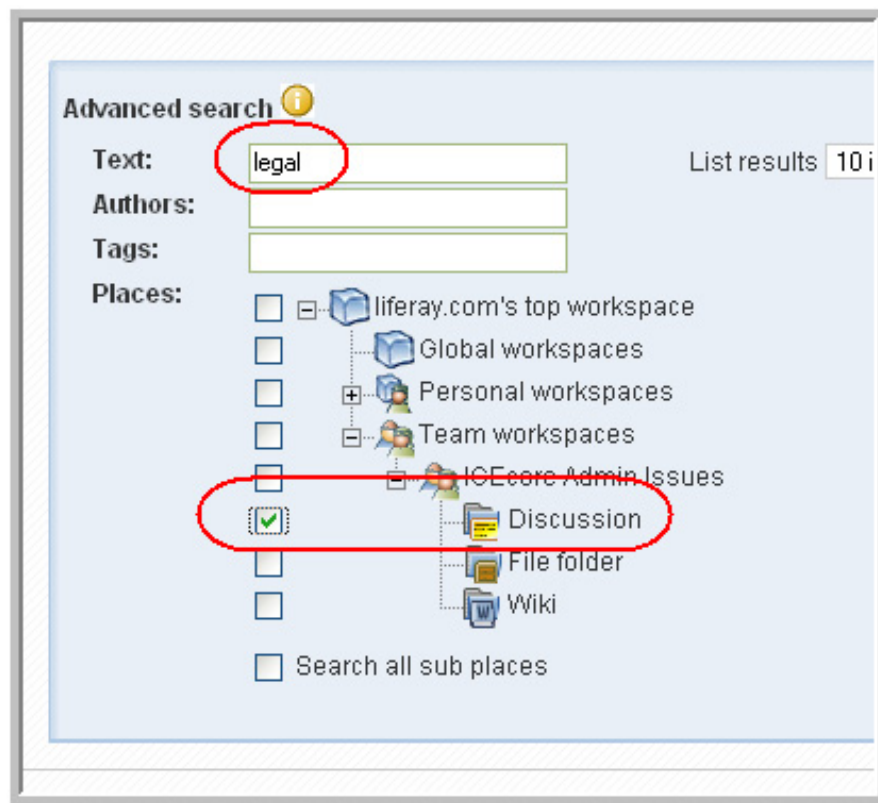
2.4 Use Advanced Search to Explore

When you perform a quick search, ICEcore searches all workspaces and folders. Use the “Advanced search” feature to perform more complex or finely tuned searches. Here is an example of using Advanced search to restrict the scope of the search:

1. From either the navigation portlet or the navigation bar, in the search section, click *Advanced*.



2. Type text that an item must contain, and check the box of one or more workspaces or folders in which to restrict the search. Consider the example in the picture on the next page.
3. Click *Search*.



This advanced search returns links to only those items in the Discussion folder (located in the “ICEcore Admin Issues” team workspace) that contain the string “legal”. Summaries of items that match the search criteria appear just below the section shown in the previous picture.

2.5 Use the Workspace Tree to Explore

In addition to using search to explore workspaces and folders in ICEcore, you can open the workspace tree in either the navigation portlet or a navigation bar, and you can visit all the places in which you are allowed to visit or participate.

ICEcore Glossary

buddy list

A list of people that you contact frequently.

entry

An item, such as a wiki topic, file, or photo, that is contained in a folder.

folder

A container for entries and other folders. Each folder has a type, such as blog, wiki, or calendar, that determines its appearance and features.

presence

The state of being connected to a communications service and available for communication. Presence information is indicated by status icons.

tag

A keyword that anyone can add to a place to make it easier to find that and related places. Community tags are shared. Personal tags are private.

tag cloud

A weighted list of tags in which frequently used tags are displayed in larger type.

workspace

A container for folders and other workspaces.