

Novell Teaming

1.0

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USER GUIDE

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About This Manual

This manual provides basic information for new users of the Novell® product called Novell Teaming.

Novell Teaming is implemented through ICEcore technology. The term “ICEcore” appears in the GUI (Graphical User Interface), and in many file and directory names, and refers to the application technology that enables the Novell Teaming software. In this manual, the term “Novell Teaming” applies to all versions of the Novell Teaming software unless otherwise noted.

This guide presents more detailed descriptions of the information found in the Novell Teaming Quick Start Guide, including more graphics.

This guide includes these topics:

- ♦ Chapter 1, “Concepts and Navigation,” on page 9
- ♦ Chapter 2, “Getting Started,” on page 31
- ♦ Chapter 3, “Features Overview,” on page 57
- ♦ Appendix A, “Troubleshooting,” on page 93
- ♦ “Glossary” on page 95

Audience

This guide is intended for all new Novell Teaming users.

Software and Documentation Version

This guide describes features in Novell Teaming version 1.0. This is revision 1.0.2 of this guide.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or go to www.novell.com/documentation/feedback.html and enter your comments there.

Change History

This table documents changes for recent revisions to this manual.

Manual revision	Changes
Revision 1.0.2	<ul style="list-style-type: none">♦ Demonstration of placing accessories into two columns (“Positioning Accessories” on page 62).♦ Clarification that presence icons require a running Pidgin client, which is a feature of Novell Conferencing (Section 2.1, “Setting Up Your Buddy List,” on page 31).

Manual revision	Changes
Revision 1.0.1	<ul style="list-style-type: none"> ♦ Another example of accessories, showing how to display entries new or changed within the last 3 or 7 days (“Creating a “What’s New?” Accessory” on page 64). ♦ Graphics and a more detailed explanation of survey folders (Section 3.2.8, “Surveys,” on page 82). ♦ More information about filtering blog entries (Section 3.2.1, “Blogs,” on page 75).

Documentation Updates

For the most recent version of this manual (or others), visit [the Novell Teaming + Conferencing Web site](http://www.novell.com/documentation/team_plus_conf/) (http://www.novell.com/documentation/team_plus_conf/).

Additional Documentation

You can find more information in the Novell Teaming documentation, which is accessible from links within the Novell Teaming software:

- ♦ Novell Teaming Help Mode
- ♦ *Novell Teaming Quick Start Guide*
- ♦ *Novell Teaming Installation and Configuration Guide*
- ♦ *Novell Teaming Administration Guide*

This document describes how to use Novell Teaming Help mode, which describes product pages and tools.

Conventions

This manual uses the conventions described in the following paragraphs and table.

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

A trademark symbol (®, ™, etc.) denotes a Novell trademark. An asterisk (*) denotes a third-party trademark.

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 a team workspace</i> button.	Items that are clickable on the page, labeled user-interface items, and variable or replaceable text are presented in italic font.
Click the <i>Getting Started</i> link.	
Note: Remember that....	Many types of headers, and defined terms in a list are presented in bold font.
Blog summary: Provides a....	

What you see	What it means
Open the <code>ManagerGuide.pdf</code> file. Type <code>status</code> , then press Enter.	Filenames and text that you must type are presented in <code>Courier</code> font.

Concepts and Navigation

1

Novell® provides the Novell Teaming product, which 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 topic provides overview information about the product and about navigating its pages. If you prefer to “learn by doing,” you might want to begin by reading the next topic ([Chapter 2, “Getting Started,” on page 31](#)).

This topic includes the following sections:

- ♦ [Section 1.1, “Novell Teaming Is Collaboration Software,” on page 9](#)
- ♦ [Section 1.2, “Novell Teaming Is Social Networking Software,” on page 10](#)
- ♦ [Section 1.3, “Navigating Workspaces and Folders,” on page 10](#)
- ♦ [Section 1.4, “Using Help Mode,” on page 24](#)

1.1 Novell Teaming Is Collaboration Software

Collaboration through Novell Teaming facilitates online work, creating a “virtual meeting space.”

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

- ♦ You and your teammates can work together without being 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 Novell Teaming, teamwork is ongoing and potentially never-ending.
- ♦ When you are working online at the same time, the “presence” feature of Novell Teaming allows you to see which teammates are currently online, and allows you to start a chat session by using Novell Conferencing, create an online meeting using Novell Conferencing, make a Skype phone call, and so on.
- ♦ Ideas are formed together, interactively, with your teammates. By the time you hold a 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. Novell Teaming becomes a “pre-meeting” meeting.
- ♦ Documents are reviewed earlier in the process, which allows easier modifications and adjustments. Novell Teaming 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 Novell Teaming access control that easily designates writers and reviewers.
- ♦ Your collaborative process is preserved and publicly accessible in Novell Teaming. No more searching through e-mail folders in a frantic effort to “catch someone up” on a lengthy e-mail discussion. To review past discussions and decisions, or to review a previous version of a document, use the powerful search capability of Novell Teaming to locate historical information quickly and easily.
- ♦ Use various Novell Teaming 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.

1.2 Novell Teaming Is Social Networking Software

The out-of-the-box Novell Teaming tools alone provide powerful enhancements to online collaboration. In addition, when you use tools in combination and apply structure to content design, Novell Teaming becomes a powerful knowledge-management and enterprise-social-networking tool. Knowledge management involves the efficient development, management, access, and distribution of organizational knowledge. Enterprise social networking involves the efficient connection of knowledgeable people needed to form teams, make decisions, and complete work (think “MySpace.comTM for the workplace”).

Consider these examples:

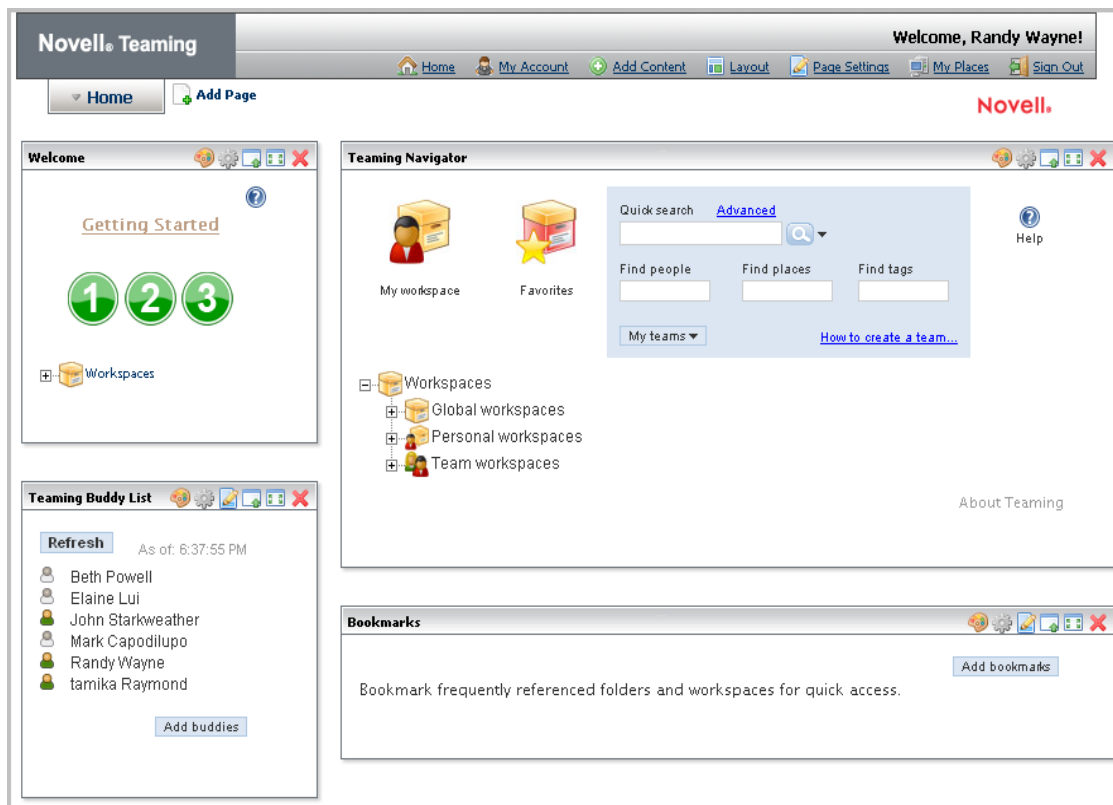
- ♦ When people use their personal workspaces to provide detailed information about themselves, the purpose of the workspace moves beyond merely contact data (phone numbers, e-mail addresses, Novell Conferencing username, and so on). It enables searches for various subject-matter experts. Also, Novell Teaming analyzes its search results, telling you which people discuss your search topic the most and in which places these conversations are happening. It is easy to see pockets of expertise associated with your area of interest.
- ♦ Experts can rate entries in Novell Teaming by using a five-star rating system (one star indicating the least impressive, and five stars being the most impressive), providing an additional tool for determining the quality of information.
- ♦ Novell Teaming provides tools, such as 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. Using these tools, teams literally move their business processes online and automate their work.
- ♦ Novell Teaming provides work-area summaries, called accessories, that provide a snapshot of a potentially large amount of information, highlighting the most relevant data. 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.

1.3 Navigating Workspaces and Folders

Your Novell Teaming site administrator provides you with the Web address (URL) used to access Novell Teaming, and your Novell Teaming username and password.

After you sign in, you see a portal page:

Figure 1-1 *The Portal Page*



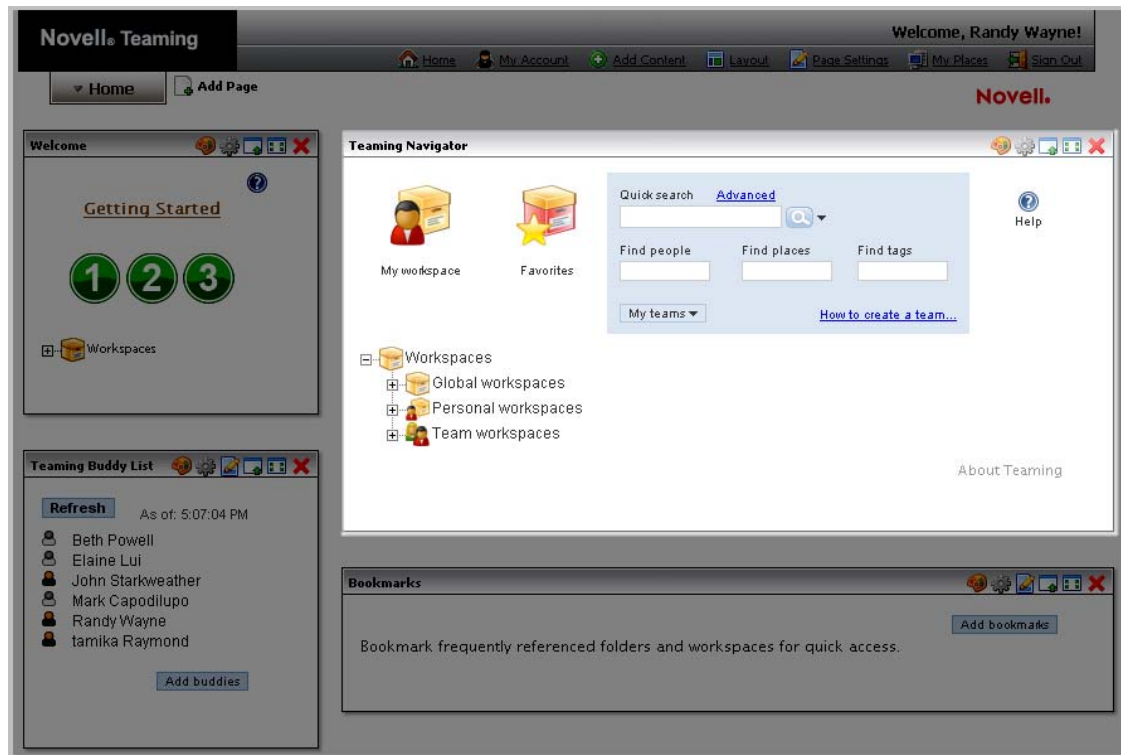
A portal page is a Web page that presents different applications in sections within the larger page. On the Internet, you might have seen pages (for example, Google* and Yahoo*) that have sections presenting a weather report that is local to your area, stock quotes that are of interest to you, the local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

By default, Novell Teaming ships with Liferay* portal software. (From this point forward, references to portal features apply to Liferay software.) Portal software contains a set of tools that allow you to create new portlets, that allow you to control the look and feel of the page outside of the portlets, and more. To use Novell Teaming, you do not need to use the portal's tools; we recommend that you use only Novell Teaming tools designed to affect the look and feel of Novell Teaming information.

If your organization chooses, it can replace the default Liferay software with different portal software. The tools provided by most portal programs are very similar. However, if your organization is using portal software other than Liferay, and if you require additional assistance, contact your Novell Teaming site administrator or your IT department for more information.

Within the portal page, separate applications can run within page sections called portlets. Here is one highlighted portlet on the portal page, as shown in the following graphic:

Figure 1-2 A Portlet Within the LargerPortal Page



This section contains the following subsections:

- ♦ [Section 1.3.1, “The Default Portlets,” on page 12](#)
- ♦ [Section 1.3.2, “The Navigator Portlet,” on page 13](#)
- ♦ [Section 1.3.3, “Viewing a Workspace or Folder,” on page 15](#)
- ♦ [Section 1.3.4, “Using More Navigational Tools,” on page 21](#)
- ♦ [Section 1.3.5, “Returning to the Portal Page,” on page 24](#)

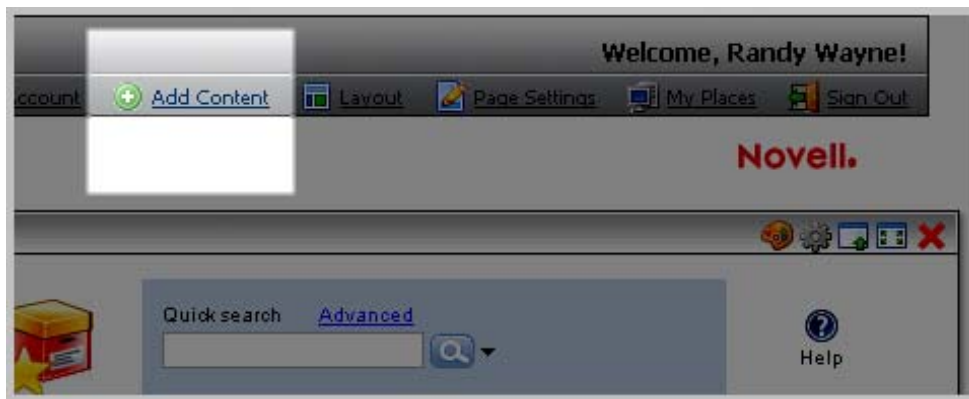
1.3.1 The Default Portlets

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

- ♦ **The welcome portlet:** Provides quick access to getting-started PDF manuals, including a PDF version of this manual. (The welcome portlet also contains a workspace tree, which is explained later in this topic.)
- ♦ **The navigator portlet:** Gives you quick access to any workspace or folder you want to view in Novell Teaming, such as access to your personal workspace, your favorite places, items that match search criteria, or 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 bookmarks portlet:** Provides links to important workspaces and folders, and can provide a count of new or changed entries in folders.

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

Figure 1-3 *The Add Content Link*



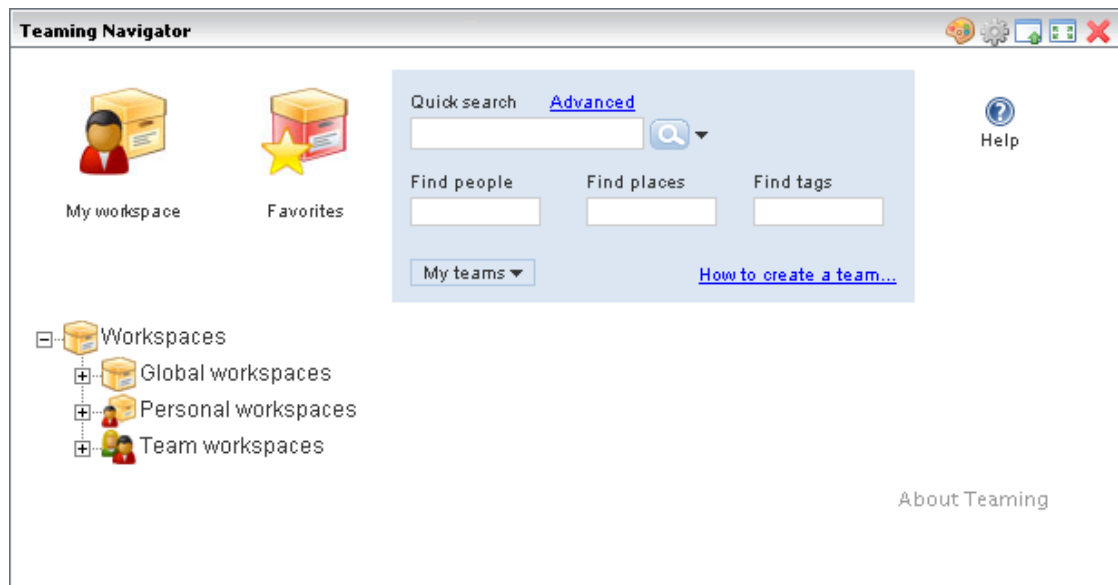
The portal software displays a list of all available portlets. Click the *Teaming* link to see a list, which includes the non-default Novell Teaming portlets, as follows:

- ♦ **Administration tools:** Displays tools for Novell Teaming site administrators.
- ♦ **Blog summary:** Provides a snapshot of journal entries from a blog of your choice within the Novell Teaming installation.
- ♦ **Guestbook summary:** Provides a snapshot of entries from your choice of Novell Teaming guest books.
- ♦ **Photo gallery:** Presents pictures from the Novell Teaming photo gallery of your choice.
- ♦ **Search:** Presents items, potentially anywhere within Novell Teaming, that match search criteria.
- ♦ **Wiki home page:** Displays a summary of the home page of the Novell Teaming wiki folder of your choice.
- ♦ **Workspace tree:** Allows you to go to any place you want within Novell Teaming. (The navigator portlet also contains a workspace tree.)

1.3.2 The Navigator Portlet

The following is a graphic showing the navigator portlet:

Figure 1-4 *The Navigator Portlet*



The navigator 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 that you can use to list links to your favorite workspaces and folders, and that you can use to access them quickly.
- ◆ **Search:** Allows you to perform different types of searches, either for any items or for specific types of items (people, places, and tags, which are category labels that you can apply to items in Novell Teaming).
- ◆ **Help:** Displays Help about various sections of the portal page, and provides access to the getting-started PDF books.
- ◆ **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 view any workspace or folder within the Novell Teaming 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 sub-workspaces entitled *Global workspaces*, *Personal workspaces*, and *Team workspaces*.

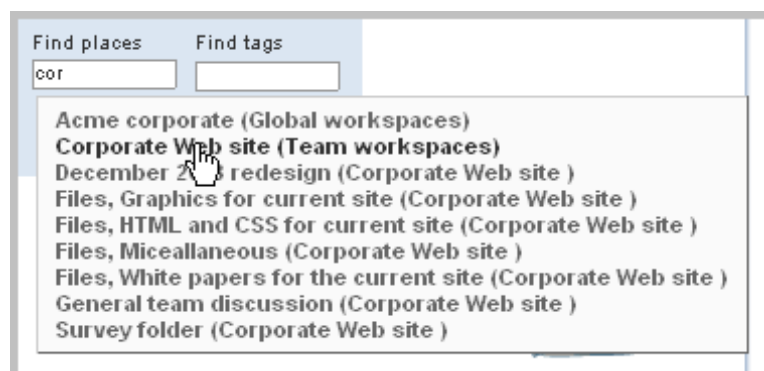
Global workspaces are containers for information available to anyone in your organization. Personal workspaces are pages of personal information (such as contact information, a personal blog, a personal calendar, and more) for everyone in your organization. Team workspaces are work areas designed to help small groups of people to work together efficiently and reach team goals.

1.3.3 Viewing a Workspace or Folder

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

For example, if you know the title of the workspace or folder you want to view, type a few of the initial letters of the title in the *Find places* text box:

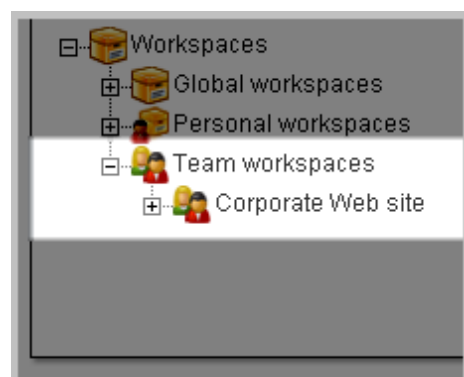
Figure 1-5 Using Type to Find to View a Folder or Workspace



In the previous graphic, after you type the three letters `cor`, Novell Teaming displays links to all workspaces and folders whose titles include a word that begins with those letters. Then, you can click the linked title of the place you want to visit (for example, *Corporate Web site*).

As another example, you can click the plus sign (+) next to the *Team workspaces* link in the workspace tree to see 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:

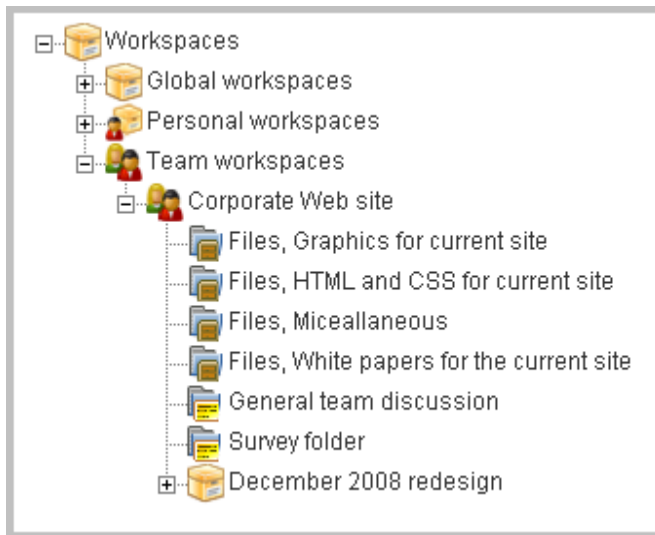
Figure 1-6 Expanding the Team Workspaces Portion of the Tree



The *Team workspaces* workspace displays a single sub-workspace, whose title is *Corporate Web site*. Novell Teaming displays links only to those workspaces for which you are a team member.

Again, using our example installation, clicking on the plus sign next to the *Corporate Web site* link displays the contents of that workspace:

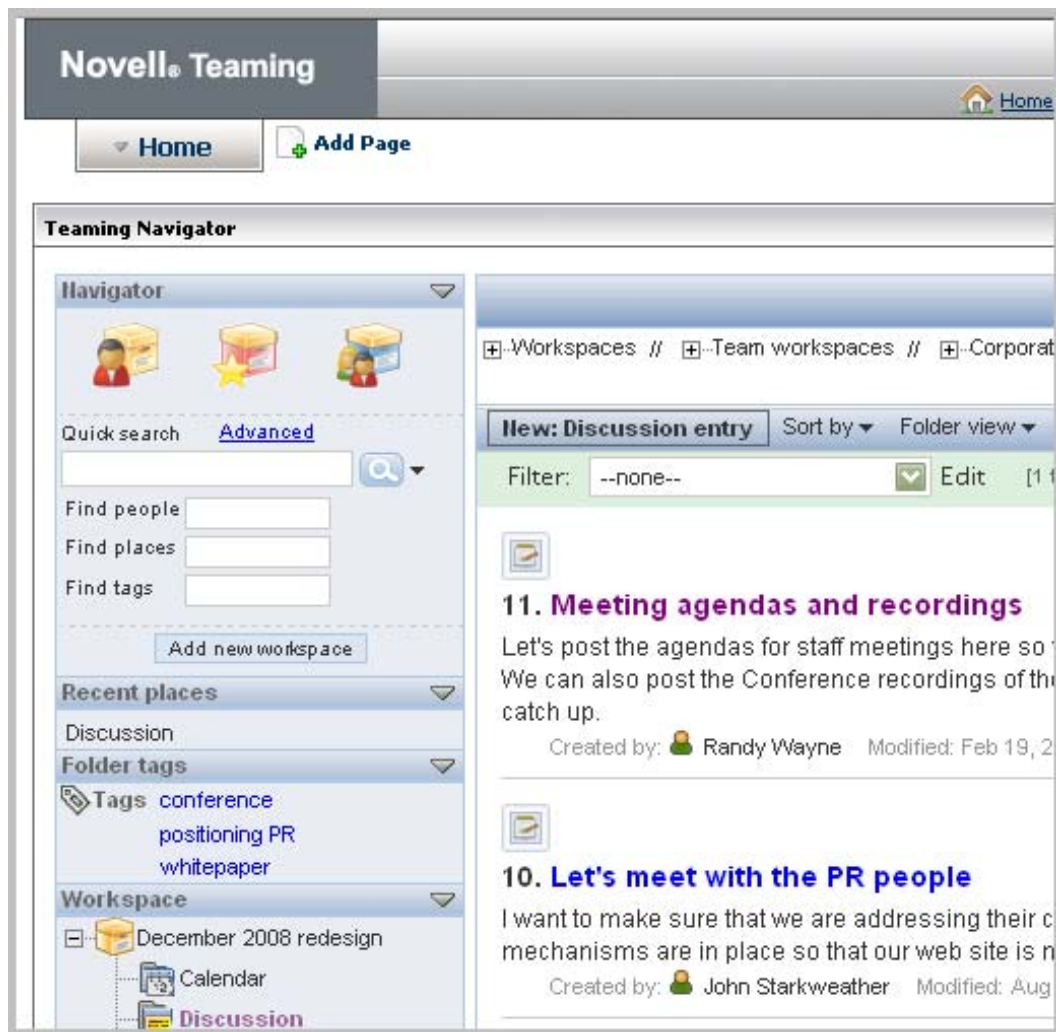
Figure 1-7 The Folders Contained Within a Team Workspace



The *Corporate Web site* team workspace contains six folders and a project workspace; a subsequent topic explains these items in more detail (see [Section 3.2, “Folder Types,” on page 74](#)). Folders can, in turn, contain subfolders, which further organize information. None of the folders in the previous graphic contain subfolders; if folders have subfolders, their titles in the workspace tree are preceded with a plus sign (+). The *December 2008 redesign* project workspace contains sub-workspaces or sub-folders.

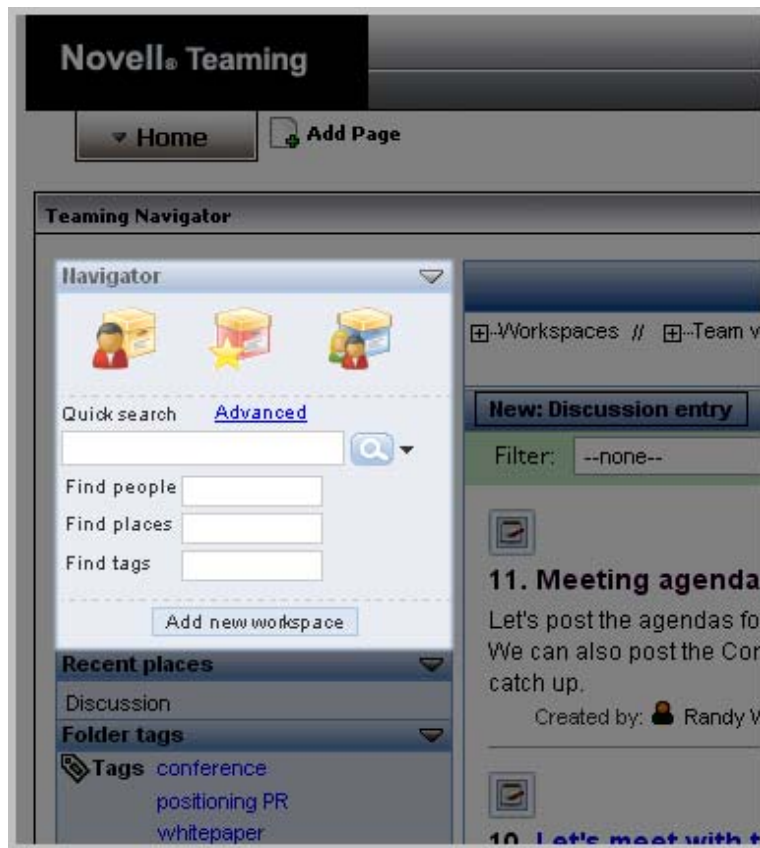
To view a folder, click its linked title. In our example, if you open the *December 2008 redesign* project workspace and click *Discussion*, the project’s discussion folder appears in a maximized portal page (in which the entire page is dedicated to displaying the folder’s contents), as follows:

Figure 1-8 A Folder Displayed in Maximized View



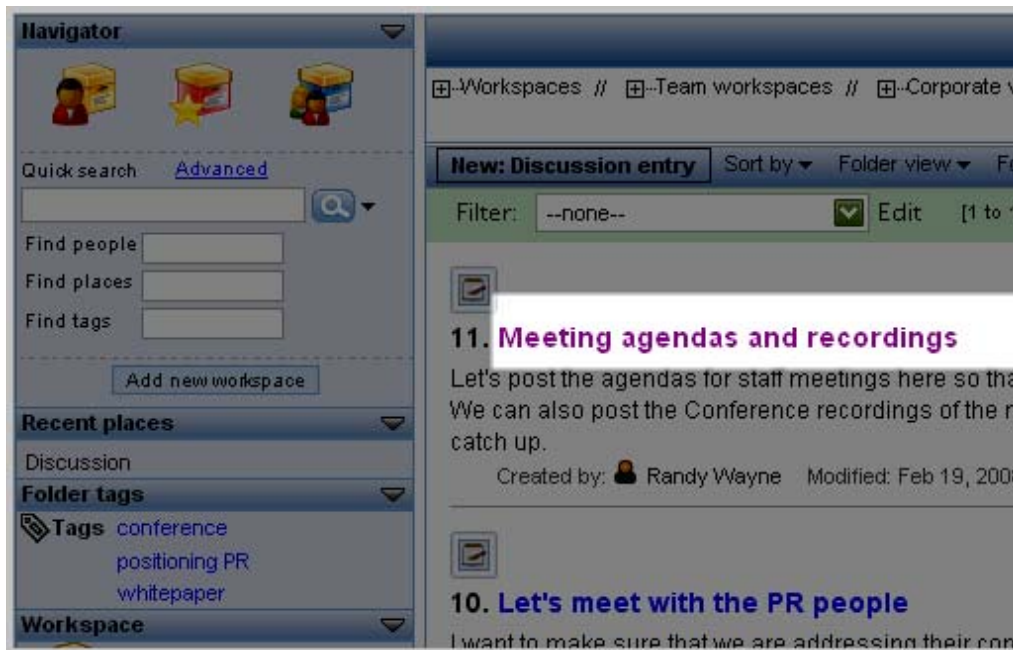
Notice that Novell Teaming displays most of the navigator-portlet tools in the top left corner of a workspace or folder page:

Figure 1-9 *The Folder Navigation Bar*



By default, a folder lists only a summary of each discussion entry. To view the entire entry, click its title:

Figure 1-10 A Linked Entry Title Within a Folder Listing



By default, Novell Teaming displays the discussion entry as an overlay, on top of the current page:

Figure 1-11 Entry Contents Displayed in an Overlaid Panel



The overlay provides additional tools for reading entries. For example, you can click the *Previous* and *Next* icons to see the previous and next entries:

Figure 1-12 Previous and Next Icons Used For Viewing Other Entries



To adjust the width of the overlaid panel, click and hold the *Width* (double-headed-arrow) icon, move your cursor left or right, and release the click when the panel's width is as you desire. To move the entire panel, click and hold the panel's tool bar (which changes the cursor), and drag the panel to another position on the page. This picture shows a repositioned overlay:

Figure 1-13 Dragging the Entry Overlay to a New Position on the Page



Click the Close icon (X) in the upper right corner of the overlay to close it, displaying only the folder listing again:

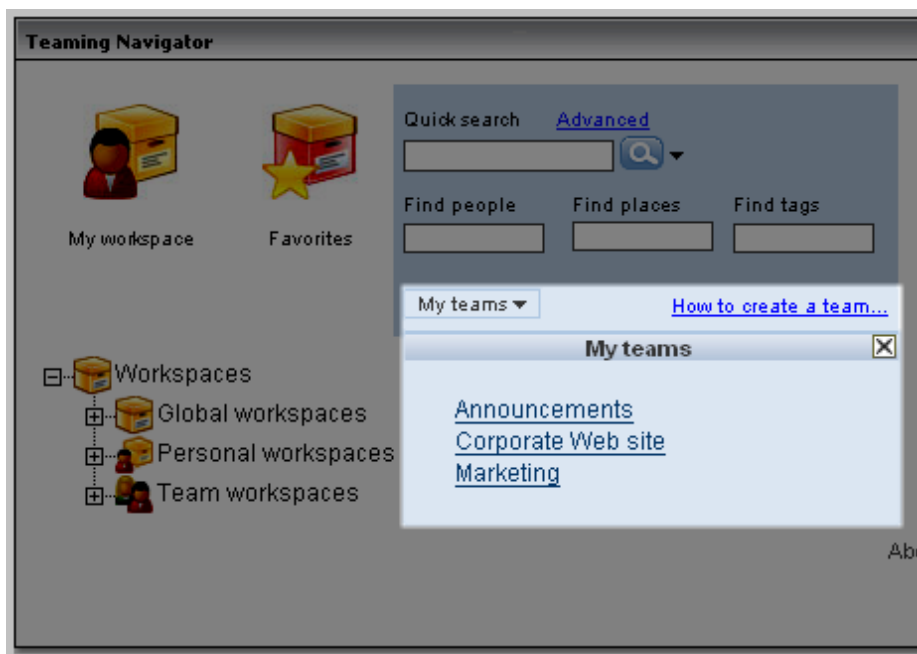
Figure 1-14 The X Icon that Closes an Entry Overlay



1.3.4 Using More Navigational Tools

Novell Teaming provides several different ways for you to go from one place to any other place within your installation, quickly and easily. For example, the previous section showed how to use the workspace tree to navigate to a team workspace page. Also in the navigator portlet, you can see a list of all the teams to which you belong:

Figure 1-15 The My Teams Link in the Navigator Portlet

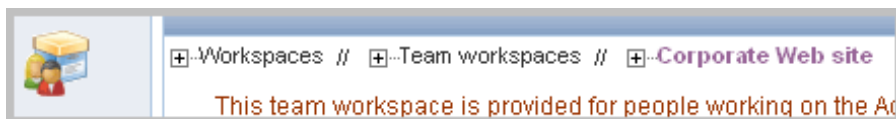


Given the previous graphic, if you click *Corporate Web site*, Novell Teaming then displays the “Corporate Web site” team workspace page.

Toward the top of Novell Teaming pages, there is a workspace tree that shows all of the workspaces and folders that contain the currently displayed page. This type of workspace tree is often called “breadcrumbs,” because it displays links to all the places that precede the currently displayed place.

Consider the workspace tree at the top of the *Corporate web site* team workspace:

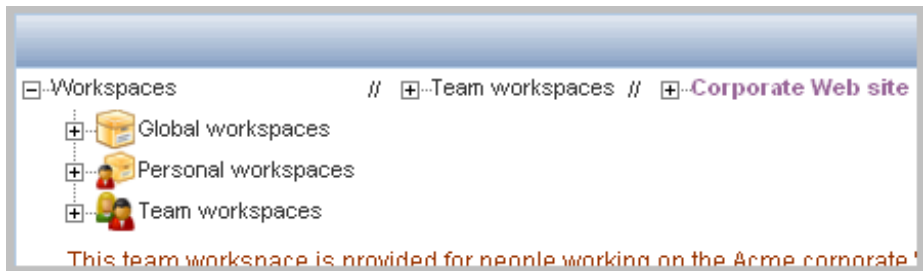
Figure 1-16 The Workspace Tree at the Top of a Workspace Page



The *Workspaces* workspace contains the *Team workspaces* workspace. The *Team workspaces* page contains the *Corporate Web site* team workspace.

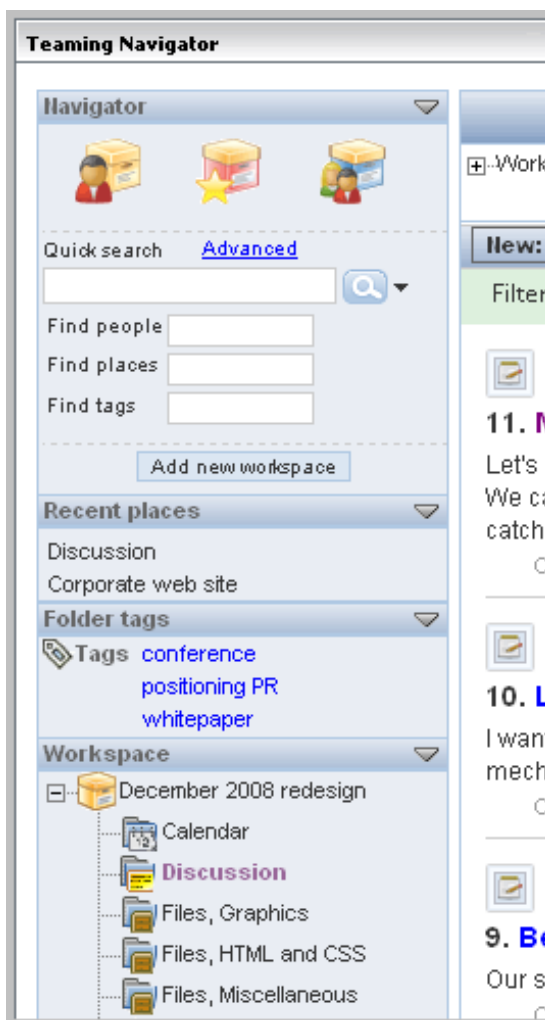
When you are finished working with the current page, you can use this workspace tree to navigate to other places:

Figure 1-17 Opening the Workspace Tree at the Top of a Workspace Page



When displaying maximized Novell Teaming pages, such as a workspace or folder page, Novell Teaming includes a tools sidebar, which provides additional navigational tools:

Figure 1-18 The Tools Sidebar



The tools sidebar for a workspace includes these sections:

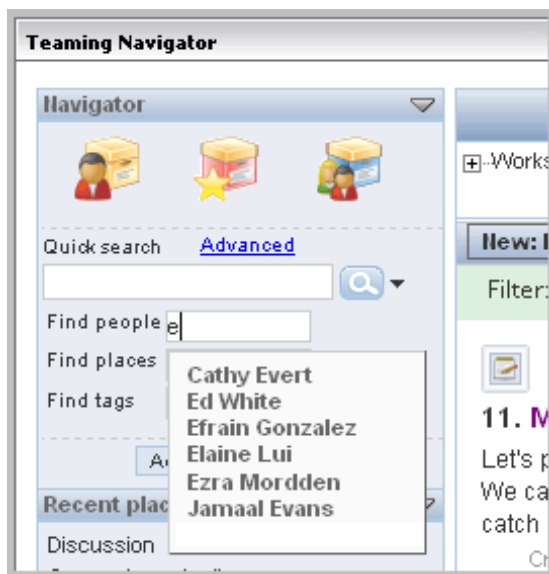
- ♦ **Navigator** -- Provides the same features as those found in the navigator portlet, allowing you to go to your personal workspace, use links to your favorite places, go to workspaces in which you are a team member, and search.

- ♦ **Recent places** -- Provides links to a few of the pages you viewed recently.
- ♦ **Folder tags** -- Displays a list of tags that have been applied to items in the currently displayed place. Tags are category labels that you create and apply to items to make them easier to find later.
- ♦ **Workspace** -- Shows links to all places contained within the current workspace. The workspace tree at the top of the page shows you the path to the current place, but this workspace tree provides a path to the contents of this place. In this example, the *December 2008 redesign* team workspace contains eleven folders.

The sections in the tools sidebar can vary by folder type. For example, blogs include a section that enables you to see journal entries in a previous month (the monthly list of blog entries is called an archive).

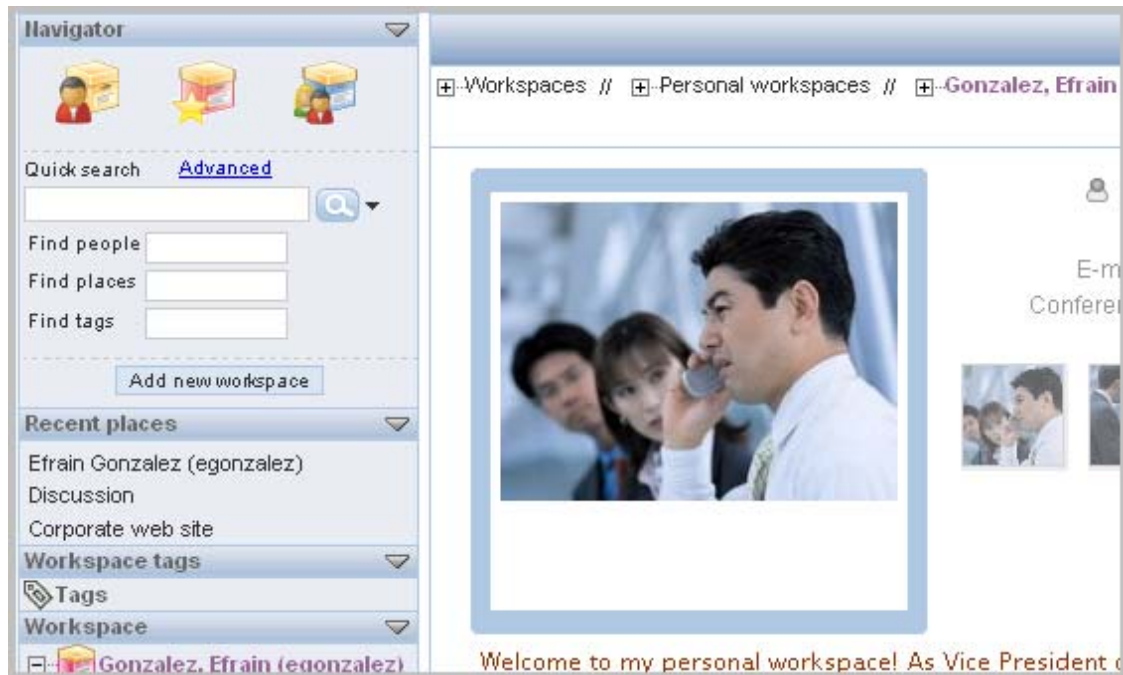
Continuing with our example, assume that the viewer of the *Corporate web site* team workspace wants to view the personal workspace of a coworker. First, he can type just a few letters of his coworker's name in the *Find people* text box of the Navigator. The following graphic shows the letter *e* typed into the *Find people* text box, and the list of all people in the installation whose first or last names begin with that letter:

Figure 1-19 The Find People Text Box in the Tools Sidebar



After the user clicks the username of *Efrain Gonzalez*, Novell Teaming displays that person's personal workspace:

Figure 1-20 *Displaying a Personal Workspace Page*

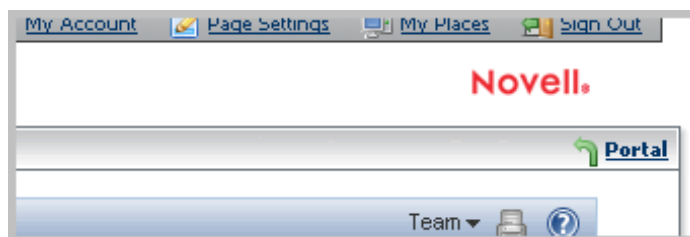


Notice that Novell Teaming now includes Efrain's personal workspace in the list of *Recent places*, shown on the tools sidebar on the left side of the page.

1.3.5 Returning to the Portal Page

To return to the portal page you saw when you first signed in, click the left-arrow, *Portal* icon toward the upper-right corner of the workspace or folder page, as follows:

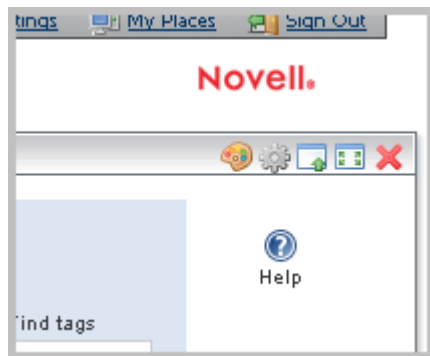
Figure 1-21 *Moving From the Workspace Page Back to the Portal Page*



1.4 Using Help Mode

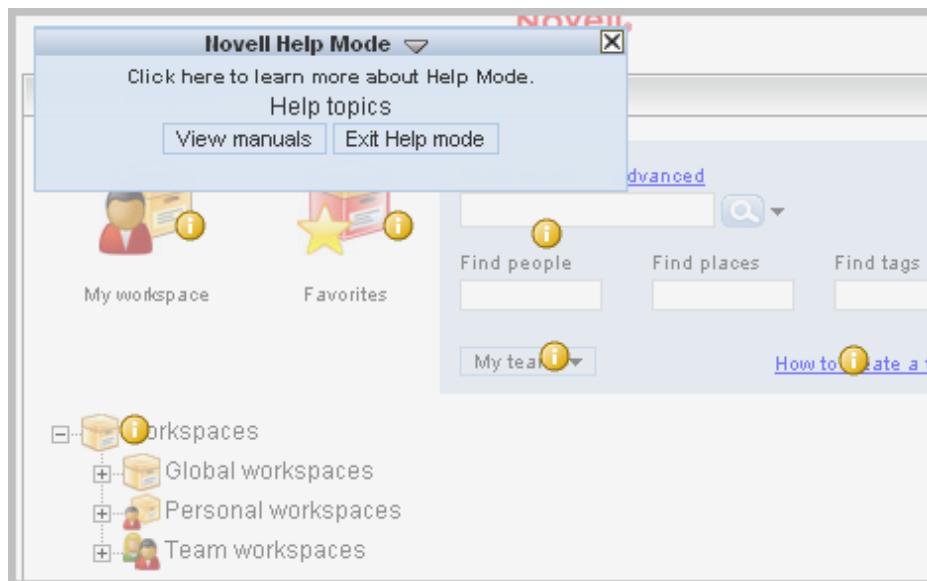
Novell Teaming has a unique way of helping you to learn about product pages and tools. The portal page, and all workspace, folder, and entry pages, include a *Help* icon:

Figure 1-22 *The Help Icon*



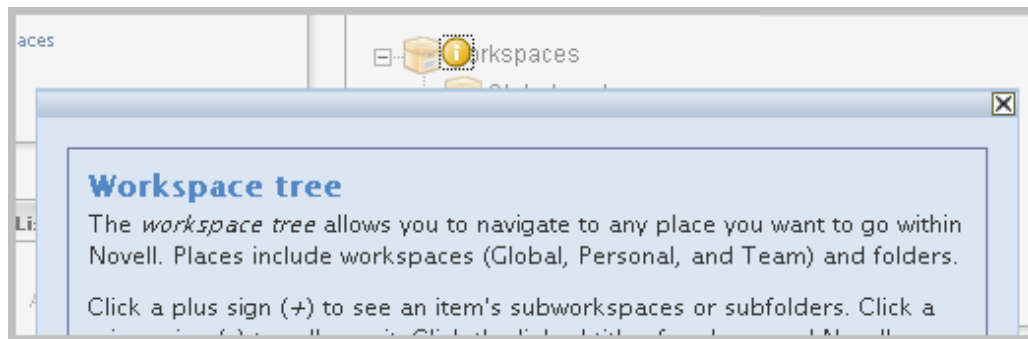
When you click this icon, Novell Teaming enters Help mode. Novell Teaming dims the page, displays the Help-mode control panel, and presents information icons (*i*) next to each section of that page for which there is Help information:

Figure 1-23 *Information Icons Appearing in Help Mode*



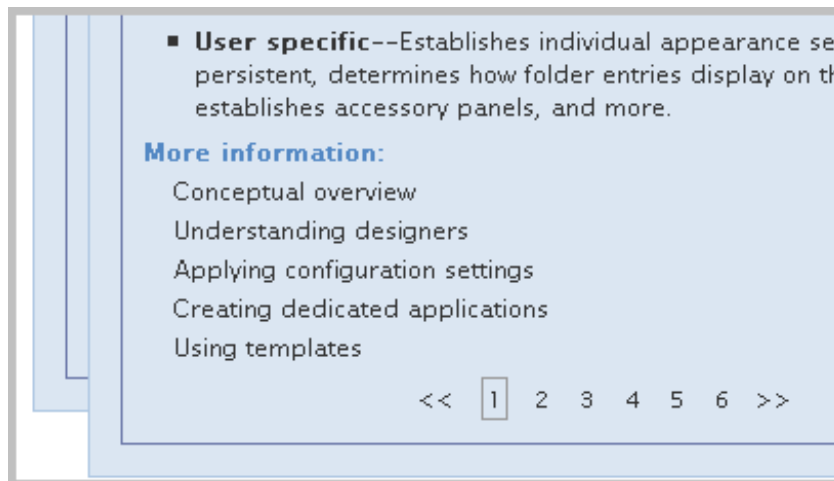
Click the information icon over the portion of the page about which you want more information. When you do, Novell Teaming displays a panel of information. When you are finished reading the panel, click the *Close* icon (X) in the upper right corner of the panel to close it. The following graphic shows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

Figure 1-24 A Help Panel and Its X Icon



Some Help topics have more than one panel of information. To move to and from pages in a Help topic, you can use the linked panel numbers and arrows, which go to the previous or next panel, at the bottom of the page:

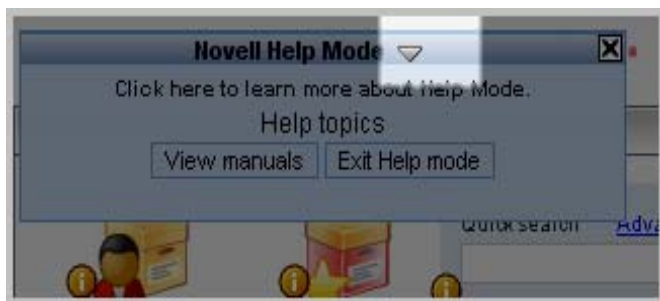
Figure 1-25 Links to the Other Help Panels in the Current Topic



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

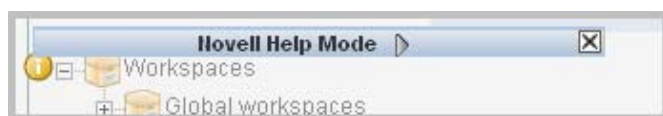
You might find that you want more room on the page to click information icons. If you choose, you can minimize the Help-mode control panel. To do so, click the *Currently displayed* (down-arrow) icon, as follows:

Figure 1-26 The Currently Displayed Icon on the Help Control Panel



After you hide the contents of the control panel, it appears as follows:

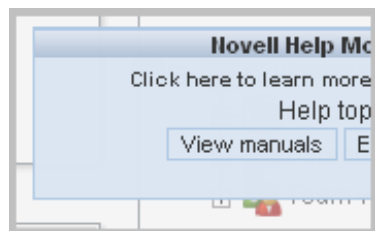
Figure 1-27 The Collapsed Help Control Panel



To display the contents of the control panel again, click the *Currently hidden* (right-arrow) icon.

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 any dimmed part of the page. The following graphic shows the location of the *View manuals* button in the Help control panel:

Figure 1-28 The View Manuals Button



This section has the following subsection:

- ♦ [Section 1.4.1, “Help for Administrators,” on page 27](#)

1.4.1 Help for Administrators

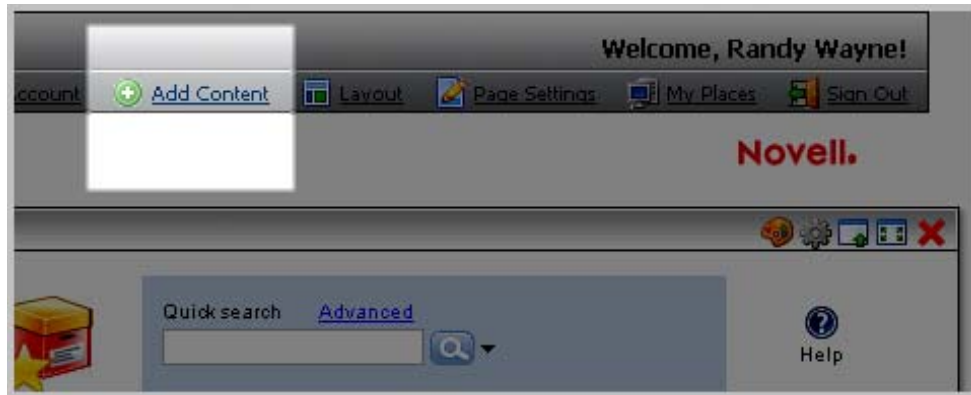
Site administrators and others might want to read overview information about administrative tasks. The administrative Help includes these topics:

- ♦ **Administration-tools portlet:** Describes the tools available in the administration portlet. Administrators of the top workspace are allowed, by default, to perform workspace and folder administration anywhere in the installation, and they can use a subset of the administration portlet tools (for example, create groups, and design entries and workflow processes). Site administrators can use all of the tools.
- ♦ **Configuration:** Describes the process of establishing the appearance and possibly templated content of workspace, folder, and entry pages.

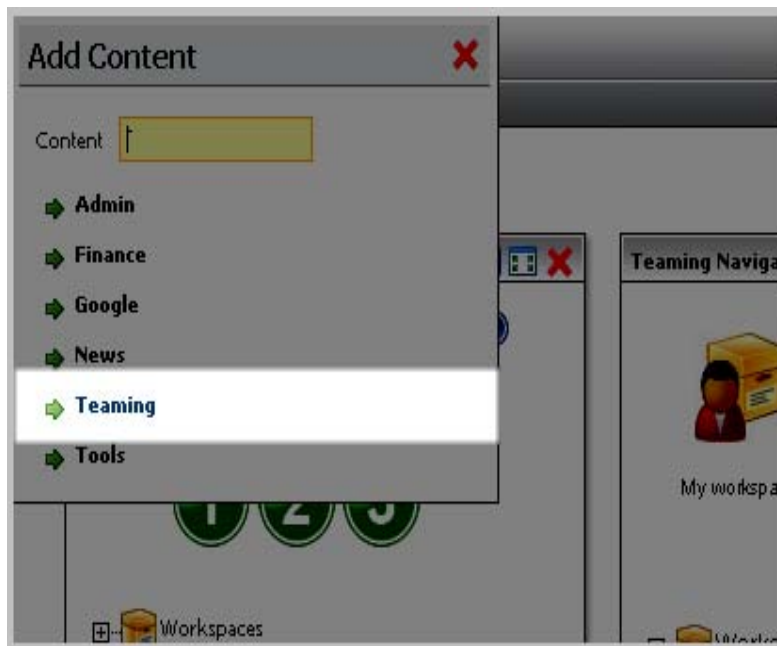
- ♦ **Access control:** Determines who has the right to perform which tasks in a given place.
- ♦ **Workflow:** Allows you to create online representations of business processes (for example, document reviews, paid time-off requests, document approvals, and so on), which can then be applied to entries in folders.

If you want to read more about these administrative topics:

- 1 On the portal page, click *Add Content*.



- 2 Click *Teaming*.



- 3 Click *Add* next to the *Teaming Administration* label.



- 4 Click the *Close* icon (X).



The Novell Teaming administration portlet appears on the portal page.

- 5 Click the *Help* icon in the upper right corner of the administration portlet.

- 6 Links to the configuration, access-control, and workflow-overview topics appear at the bottom of the Help panel for the administration portlet:

workflows, create groups, generate reports, re-index places (to improve search efficiency), and more.

Novell administration--especially configuration--happens in stages. Balance the need to make your installation minimally functional and the need to wait until user participation directs the optimal use of Novell for your organization. Use the links at the end of this Help panel to review brief overviews of primary administrative tasks.

Finally, if you choose to develop a sizeable Global workspace tree, you might want to design and create group names for your organization early in the configuration process. (Group names are not required for team creation or the management of personal workspaces.)

For more information:

[Configuration overview](#)

[Access-control overview](#)

[Workflow overview](#)

[Novell Installation and Configuration Guide](#) (appears in a new window or tab)

This topic describes a few tasks that quickly demonstrate the basic features and concepts of Novell Teaming.

This topic includes the following sections:

- ♦ [Section 2.1, “Setting Up Your Buddy List,” on page 31](#)
- ♦ [Section 2.2, “Modifying Your Personal Workspace,” on page 34](#)
- ♦ [Section 2.3, “Creating a Team Workspace,” on page 49](#)
- ♦ [Section 2.4, “Using Advanced Search to Explore,” on page 53](#)
- ♦ [Section 2.5, “Using the Workspace Tree to Explore,” on page 54](#)

2.1 Setting Up Your Buddy List

One of the most powerful tools in Novell Teaming is the presence icon. This icon uses color to show you whether a person is online using Novell Conferencing and its Pidgin client. The presence icon enables quick communication with that person (sending an instant message using Novell Conferencing, initiating an instant meeting using Novell Conferencing, sending e-mail, placing a call using Skype, and so on).

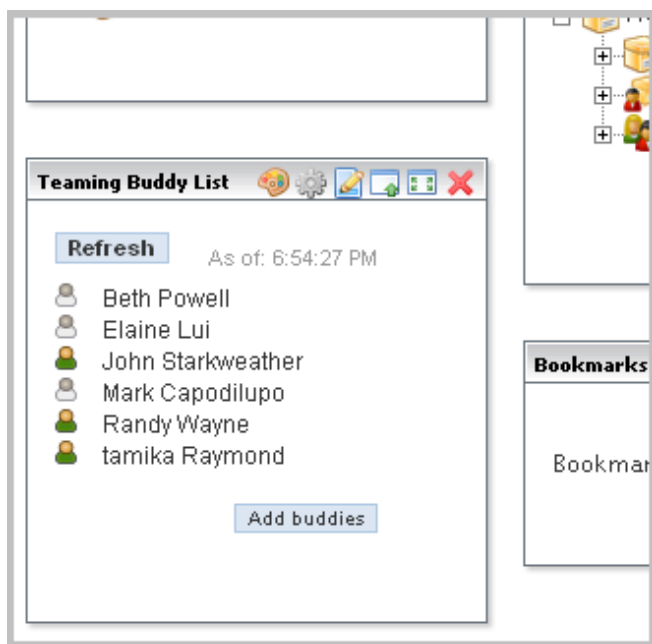
NOTE: Your presence icon requires that you run the Novell Conferencing Pidgin client on your computer. Running other IM or chat software will not enable your presence icon. If your presence icon does not display color properly, see your site administrator for more information.

Although presence icons are displayed in Novell Teaming wherever you see someone’s name, a great way to get started with presence is to set up your buddy-list portlet, so that, as soon as you log in, you can see whether your buddies are online and logged into Pidgin.

To set up your buddy list:

- 1 Sign in with your username and password.

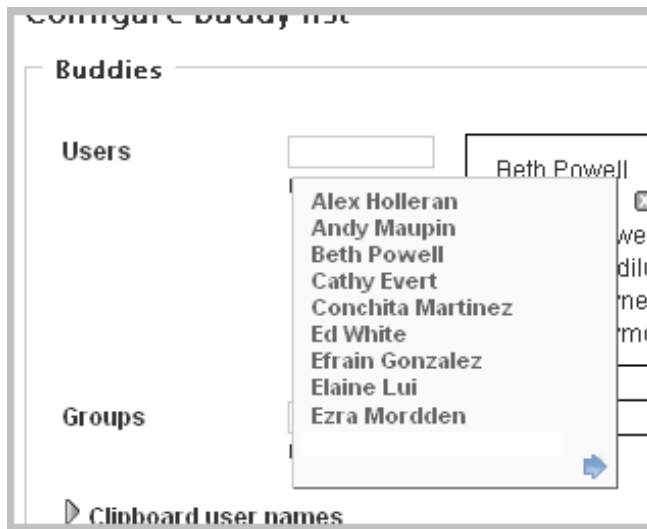
- 2 Locate the *Teaming Buddy List* portlet (unlike this picture, your portlet probably contains no names yet other than your own):



If you do not see the portlet, click *Add Content* in the upper right corner of the portal page, click *Teaming*, click the *Add* button next to the label *Teaming Buddy List*, and click the *Close* icon (X). Novell Teaming adds the buddy-list portlet to the portal page. If you require more assistance, see your Novell Teaming site administrator.

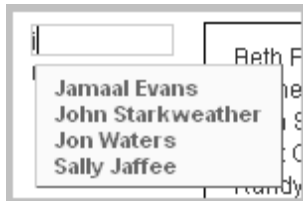
- 3 In the portlet, click *Add buddies*.
Novell Teaming displays the *Configure buddy list* form.
- 4 Type the first few letters of either the first or last name of a buddy, and then click that person's linked name in the drop-down list.

Novell Teaming includes the type-to-find feature. To use this feature, place your cursor in a text box that requires a known type of information, such as a name. Then, type a space, and then backspace over it. Novell Teaming then displays a list of links to all possible items:



Notice the blue arrow in the bottom-right corner of the names panel. You can view next and previous panels of choices using the blue-arrow icons.

As you type characters in the text box, Novell Teaming adjusts the list to match what you type. The following example shows what happens in the example installation when someone types the letter *j*:



Novell Teaming displays a list of links of all the people whose first or last names match what you have typed so far. Click the linked name to add that person to your buddy list.

- 5** Repeat Step 4 as often as necessary to add all of your buddies.

If you mistakenly add a name, click the *Delete* icon (*X*) next to the name to remove it:



- 6** Click *Apply*.


- 7** Click *Close*.

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

- ♦ Presence icons appear as follows:

 Online

 Away (recently online)

 Offline

 Status unknown

- ♦ To communicate with a buddy, click the presence icon and select a communication method (instant message, instant meeting, e-mail, and so on).
- ♦ To view a buddy's personal workspace (which includes contact information), click the linked name of your buddy.

2.2 Modifying Your Personal Workspace

As the next step involved with learning to use Novell Teaming, you can create a comfortable working space in your personal workspace.

Your personal workspace is your Novell Teaming homepage. Like any workspace, such as your desk at work, or your wood shop or kitchen at home, it can be helpful to brighten, organize, or personalize your environment. It is also helpful to provide a safe space for people to visit you in your workspace (for example, a waiting or viewing area). You can apply similar approaches to your online workspace in Novell Teaming.

By default, other people are allowed to visit your workspace, but only you can participate in it. Participation means that you can create new entries in your folders, and visiting means that people can read your entries and can comment on them.

This section contains the following subsections:

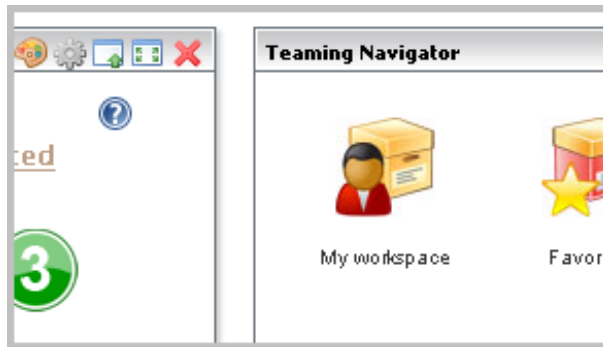
- ♦ [Section 2.2.1, “Adding Basic Information,” on page 34](#)
- ♦ [Section 2.2.2, “Editing Contact Information and Add Pictures,” on page 37](#)
- ♦ [Section 2.2.3, “Add a Blog Entry,” on page 39](#)
- ♦ [Section 2.2.4, “Collaborate with Others,” on page 44](#)

2.2.1 Adding Basic Information

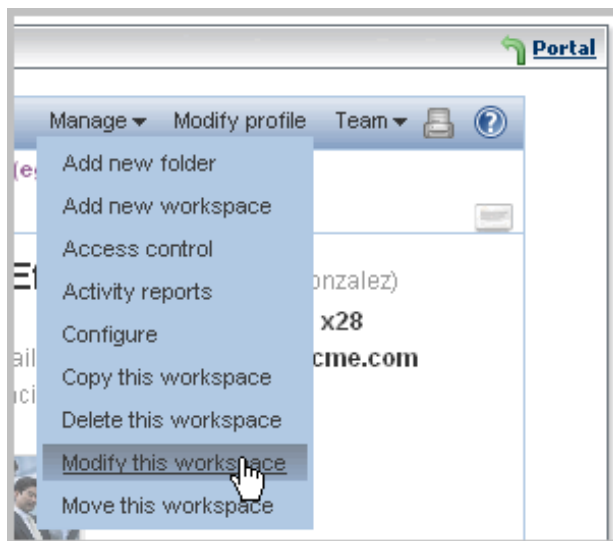
As the first step, it can be helpful to provide some introductory text for visitors to your personal workspace.

To modify your personal workspace:

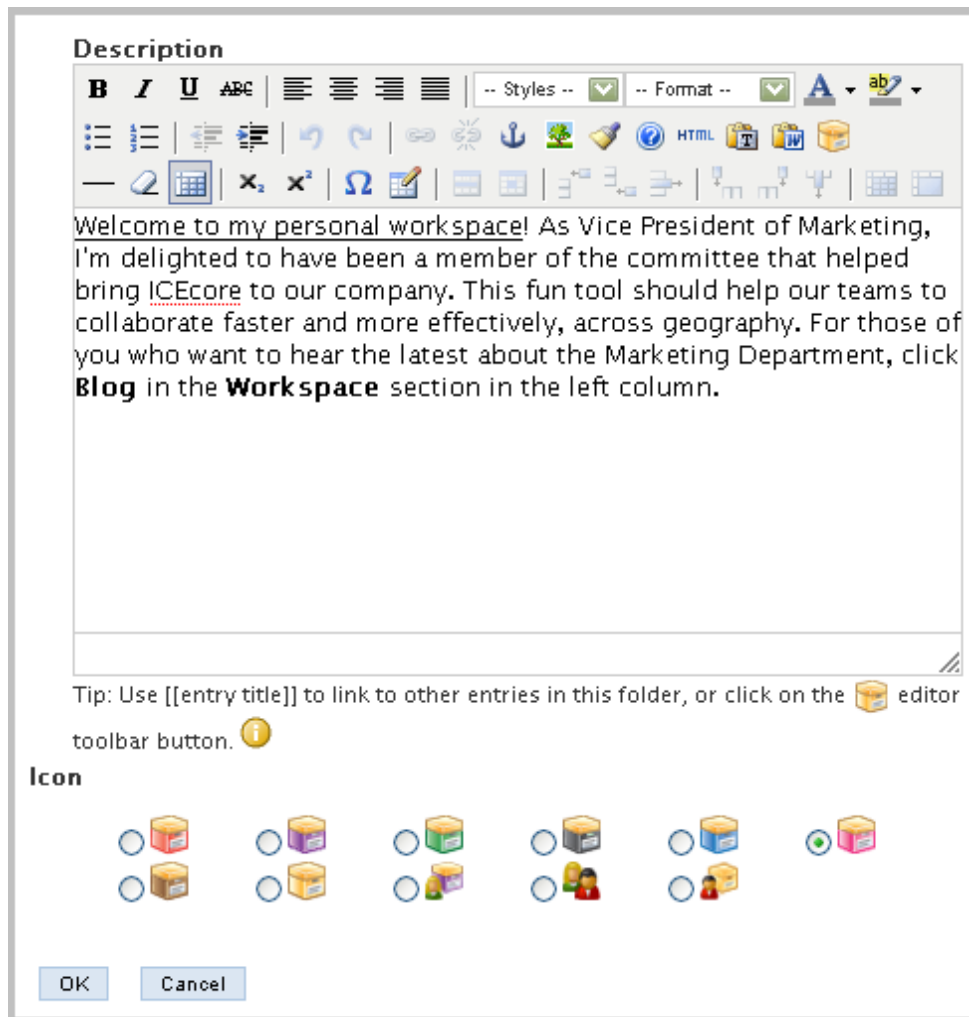
- 1 On the portal page, click *My workspace* in the navigator portlet:



- 2 Click *Manage > Modify this workspace*, located toward the upper right corner of the page:



Novell Teaming displays a form that allows you to add a personal description to your workspace:



The screenshot shows a web form titled "Description" for editing a workspace. It features a rich text editor toolbar with options for bold, italic, underline, text color, background color, bulleted and numbered lists, indentation, link, unlink, anchor, insert image, insert table, insert HTML, insert word document, insert excel spreadsheet, insert powerpoint presentation, insert media, insert table of contents, and insert index. The text area contains a welcome message: "Welcome to my personal workspace! As Vice President of Marketing, I'm delighted to have been a member of the committee that helped bring ICEcore to our company. This fun tool should help our teams to collaborate faster and more effectively, across geography. For those of you who want to hear the latest about the Marketing Department, click **Blog** in the **Workspace** section in the left column." Below the text area is a tip: "Tip: Use [[entry title]] to link to other entries in this folder, or click on the [editor icon] editor toolbar button." The "Icon" section displays a grid of 12 icons, each consisting of a small cube and a circle. At the bottom are "OK" and "Cancel" buttons.

Consider using the editor in the *Description* section to compose a welcome message for people visiting your page. This is an HTML editor; you can use the tool bar at the top to format your message with bold text, color, pictures, tables, and so on. You can also use the *Icon* section to select a different icon for display in the workspace tree next to the link for your personal workspace.

3 Click *OK*.

Novell Teaming displays the personal workspace page again, including the new descriptive text:

Figure 2-1 The Modified Personal-Workspace Page



While viewing a personal workspace page, you can collapse the contact information so that it is easier to see more of the content. To collapse the contact information, click the *Hide contact information* icon in the upper right corner of the workspace page.

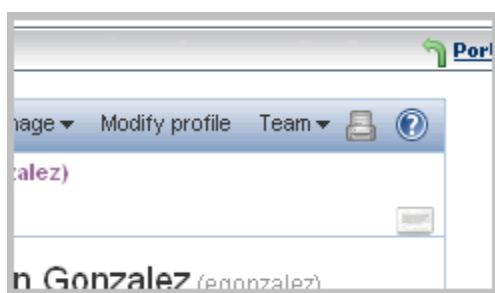
2.2.2 Editing Contact Information and Add Pictures

Although your Novell Teaming site administrator probably specified some of your contact information, it is a good idea to check it, modify it, and make sure that it is complete. For example, the presence feature requires that you specify your Novell Conferencing username correctly on your personal workspace.

Also, uploading pictures can help visitors to identify you, and it can provide decoration and amusement.

To modify your contact information and upload pictures:

- 1 Click *Modify profile*:



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

- 2 Alter any contact information that is missing or incorrect.

- 3 Click the *Browse* button to upload a picture:

The screenshot shows a user profile form with the following fields:

- Login name:** egonzalez
- First name:** Efrain
- Middle name:** (empty)
- Last name:** Gonzalez
- E-mail address:** egonzalez@acme.com
- Mobile e-mail address:** (empty)
- Text messaging e-mail address:** (empty)
- Conferencing user name:** egonzalez
- Phone:** 978-555-7000 x28

Below the contact information is a **Picture** section with a text input field and a **Browse...** button. Underneath is a **Current Picture** section containing two entries:

- ☐ efrain1.jpg
- ☐ efrain2.jpg

Each entry has a set of four arrows (up, down, left, right) to its left. Below the list is the text "(Select the files to be deleted.)". At the bottom of the form are **OK** and **Cancel** buttons.

Novell Teaming places the filename of the picture in the *Current pictures* section of the page.

- 4 Repeat Step 3 until you upload all the pictures you want into your personal workspace.
- 5 Next to the filenames of uploaded pictures, click the up-arrow or down-arrow to position the picture where you want it in the list:

This is a close-up of the **Current Picture** section from the previous screenshot. It shows the list of files:

- ☐ efrain1.jpg
- ☐ efrain2.jpg

Each file has a set of four arrows (up, down, left, right) to its left. Below the list is the text "(Select the files to be deleted.)". At the bottom of the section are **OK** and **Cancel** buttons.

The first picture in the list becomes the primary picture in your personal workspace.

To delete a picture from your personal workspace, select the check box next to the filename, and Novell Teaming removes it after you submit the form.

- 6 When you are finished, click *OK* to submit the form.

Novell Teaming displays the first picture in your list as the main picture in your personal workspace, and displays all other pictures as thumbnails (smaller versions) below the contact information:

Figure 2-2 *Primary Picture and Thumbnail Pictures*



Tips for Uploading Images

- ◆ You can add as many pictures as you like, but you must add them one by one.
- ◆ When viewing any personal workspace, mouse over the thumbnail pictures located just below the contact information, and Novell Teaming displays each picture in the larger frame to the left of the contact information.
- ◆ Click any of the pictures in the personal workspace, and Novell Teaming displays a full-size version of that picture.

2.2.3 Add a Blog Entry

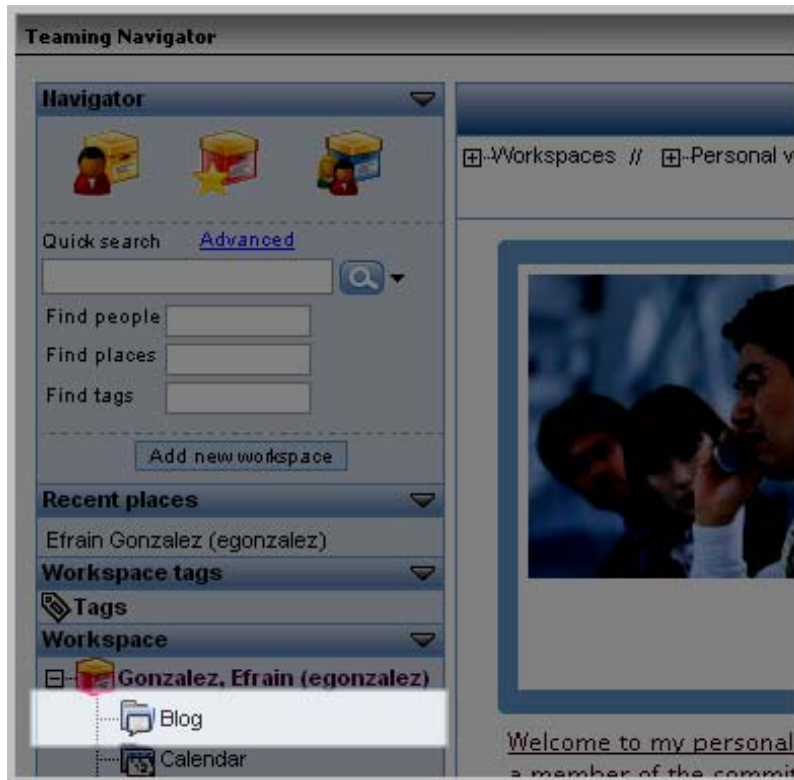
Blogs are a new and popular communications tool available on the Internet. Blog folders display journal entries chronologically (starting with the most recent, and ending with the oldest). The blog folder in your personal workspace is for your journal entries.

From a teamwork perspective, a blog can present your newest ideas to your teammates in a timely, informal way. Comments that teammates make about your journal entry can help you to further develop your ideas. Blogs provide a way to collaborate informally before the work must become more structured.

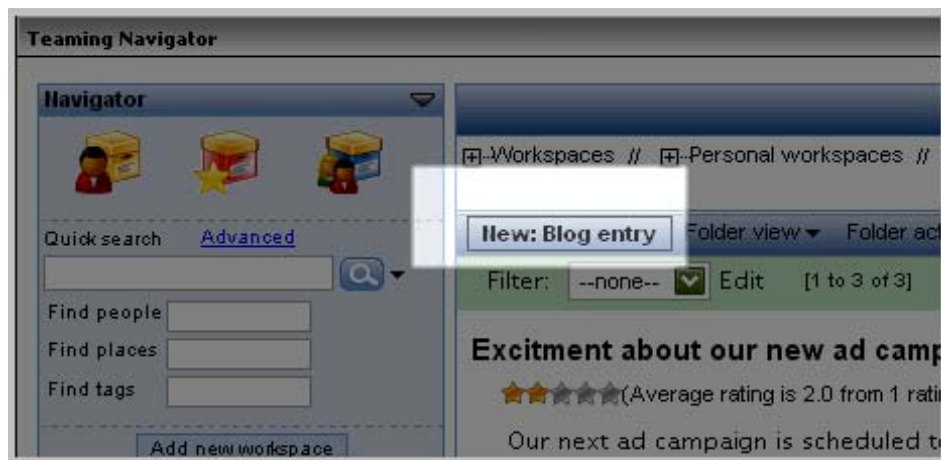
To add an entry to your blog:

- 1 View your personal workspace page.

- 2 In the *Workspace* section of the tools sidebar, click the title of your blog folder (*Blog*, by default):



- 3 Click *New: Blog entry*:



Novell Teaming displays a form.

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

This is an example of a blog entry as it appears on the folder page:

Figure 2-3 Completed Blog Entry

Navigator

Quick search [Advanced](#)

Find people

Find places

Find tags

Add new workspace

Recent places

Blog

Efrain Gonzalez (egonzalez)

Blog

March 2008

S M T W T F S

24 25 26 27 28 29 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 1 2 3 4 5

<< Today >>

OK

Archives

August 2007(3)

Folder tags

Tags

Workspace

Gonzalez, Efrain (egonzalez)

Blog

Calendar

Manage Subscriptions Team

Workspaces // Personal workspaces // Gonzalez, Efrain (egonzalez) // Blog

Accessory Panel

New: Blog entry Folder view Folder action

Filter: --none-- Edit [1 to 3 of 3] Show 10 entries

Excitement about our new ad campaign

Aug 20, 2007 4:13 PM by Efrain Gonzalez

★★★★★ (Average rating is 2.0 from 1 rating.) 6 visits 1 comment

Our next ad campaign is scheduled to begin just after Labor Day, when people are back from their vacations, refreshed, and ready to pay attention again. And they won't be the only ones who are refreshed. I think that this new ad campaign is a fresh start for our division.

I'd like to draw you to a few aspects of the new ads:

- New Acme corporate logo
- Copy reflects the new Acme vision and strategy (attached)
- A more elegant set of visuals

Moving forward, I think that it's important to take time out and congratulate the ad-campaign team for a job well done! Sally Jaffee in particular deserves a huge round of applause from everyone.

Having said that, we here at Acme are also dedicated to continuous improvement. So, we want to keep the feedback flowing so that our next ad campaign can be even **better** than the last.

Good work, team!

[Edit]

Attachments

Acme vision and strategy.doc [HTML] [EDIT] Aug 20, 2007 4:13:27 PM 20KB Efrain Gonzalez

This is the content of the entry:

Figure 2-4 Content of the Completed Blog Entry

Excitment about our new ad campaign

Aug 20, 2007 4:13 PM by  Efrain Gonzalez

★☆☆☆☆ (Average rating is 2.0 from 1 rating.) 6 visits 1 comment

Our next ad campaign is scheduled to begin just after Labor Day, when people are back from their vacations, refreshed, and ready to pay attention again. And they won't be the only ones who are refreshed. I think that this new ad campaign is a fresh start for our division.

I'd like to draw you to a few aspects of the new ads:

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Good work, team!

[\[Edit\]](#)

Attachments





Acme
vision and [\[HTML\]](#) [\[EDIT\]](#) Aug 20, 2007 4:13:27 PM 20KB Efrain Gonzalez
strategy.doc

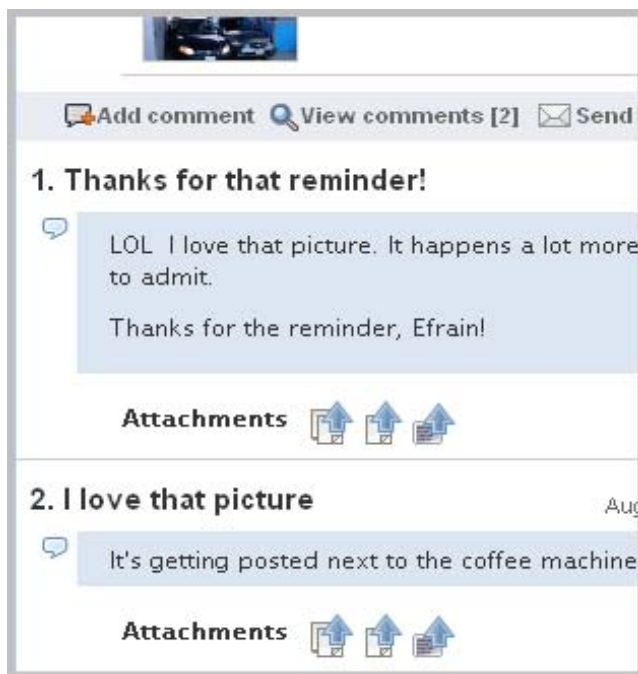
Later, you can check the *View comments* tool and its counter, located at the bottom of your blog (this entry has 2 comments):

Figure 2-5 *The View Comments Link at the Bottom of the Blog Entry*



Click *View comments* to see them (and click it again to hide them):

Figure 2-6 *Displayed Comments for a Blog Entry*



Tips for Writing Blog Entries

- ♦ Attach pictures or supporting documents to make your journal entries more interesting.
- ♦ For pictures available on the Internet, you can use the HTML editor to place the picture right into your entry.
- ♦ Invite others to comment by asking for specific kinds of feedback.

2.2.4 Collaborate with Others

After doing the tasks described in the previous sections, you have completed the minimum number of tasks recommended to get started using your personal workspace. Developing a vibrant, purposeful collaboration space requires striking a balance between having something for people to do when they first arrive in a space (read your introduction, view your pictures, note your contact information, and read and comment on your blog entries), and allowing the participation of your teammates to guide you in developing additional content.

This section provides ideas for further activity involving personal workspaces. Consider these points over time, as you become more accustomed to working with Novell Teaming.

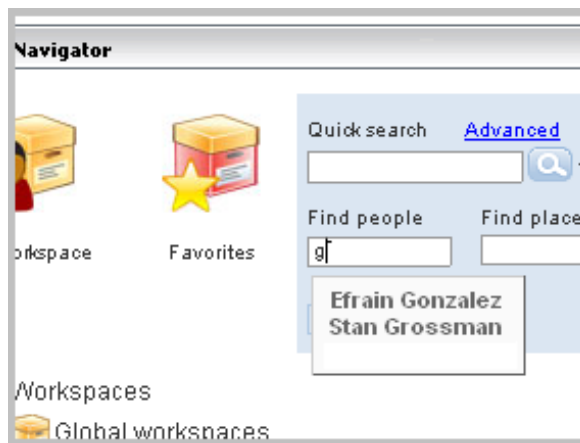
This section contains the following subsections:

- ♦ “Commenting on a Blog Entry” on page 44
- ♦ “Collaborating in a Folder” on page 46

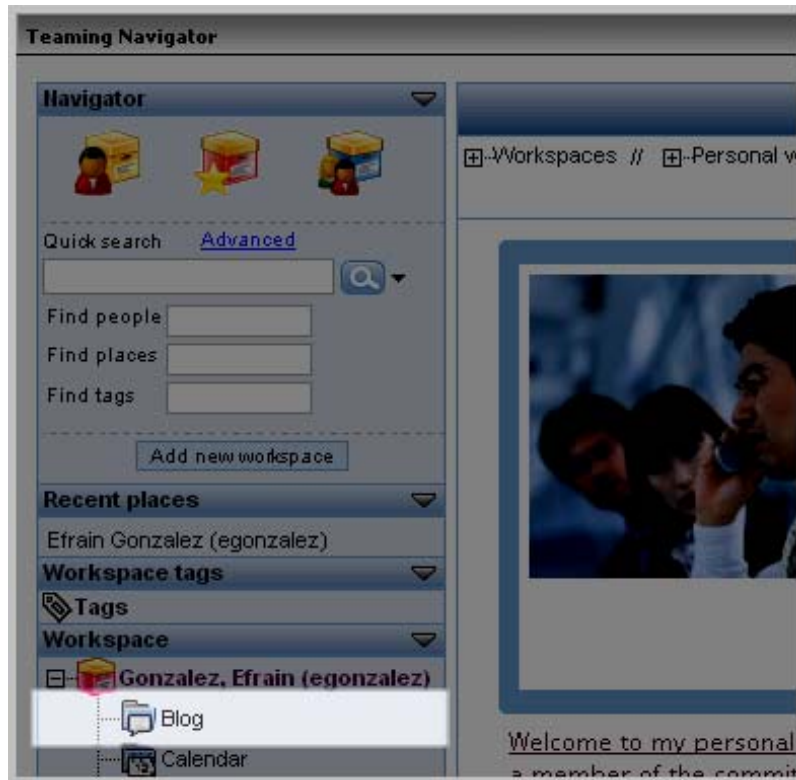
Commenting on a Blog Entry

While you are waiting for teammates to comment on your initial blog entry, you can add a comment to someone else’s blog entry:

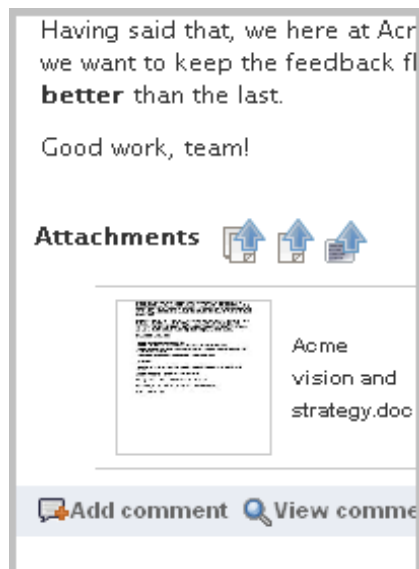
- 1 Sign in and view the portal page.
- 2 In the *Find people* text box, type a few letters of a teammate’s first or last name, and click the linked name of the person whose blog you want to view:



- 3 In the *Workspace* section of the tools sidebar, click the title of the person's blog (*Blog*, by default):

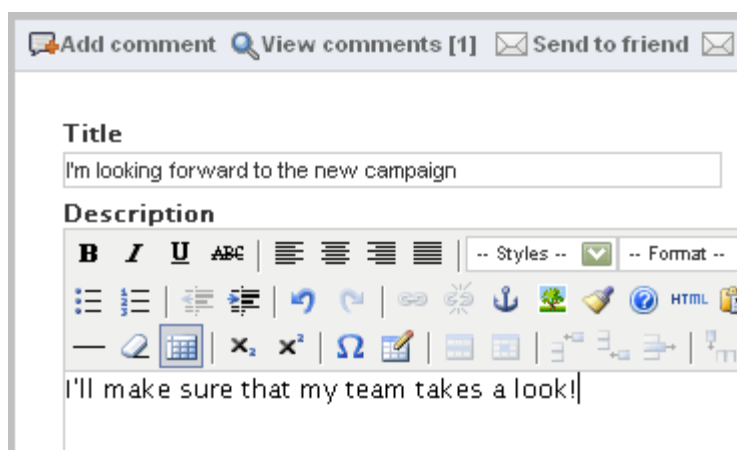


- 4 At the bottom of a blog entry, click the *Add comment* link:



Novell Teaming displays a form just below the *Add comment* link.

5 Provide text for your comment:



The screenshot shows a web form for adding a comment. At the top, there are three links: "Add comment" (with a speech bubble icon), "View comments [1]" (with a magnifying glass icon), and "Send to friend" (with an envelope icon). Below these links is a "Title" section with a text input field containing the text "I'm looking forward to the new campaign". Underneath the title is a "Description" section with a rich text editor. The editor has a toolbar with various icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, anchor, image, video, audio, and HTML. Below the toolbar, the text "I'll make sure that my team takes a look!" is entered in the description field.

6 Toward the bottom of the comment form, click *OK*.

Novell Teaming adds your comment to the blog entry:

Figure 2-7 A Comment Added to a Blog Entry

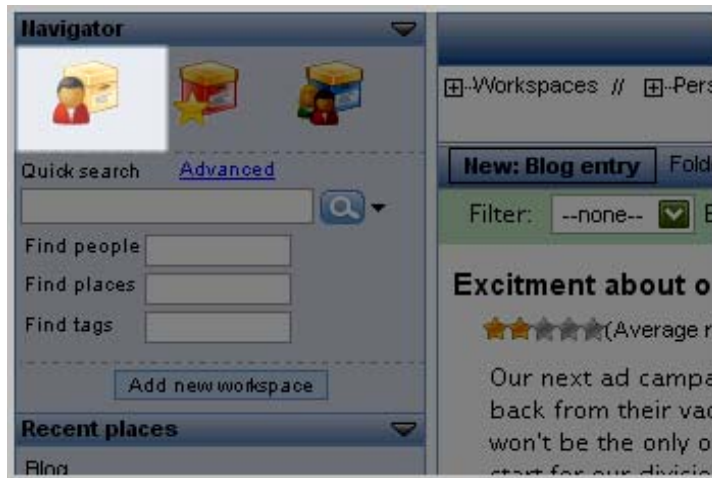


Collaborating in a Folder

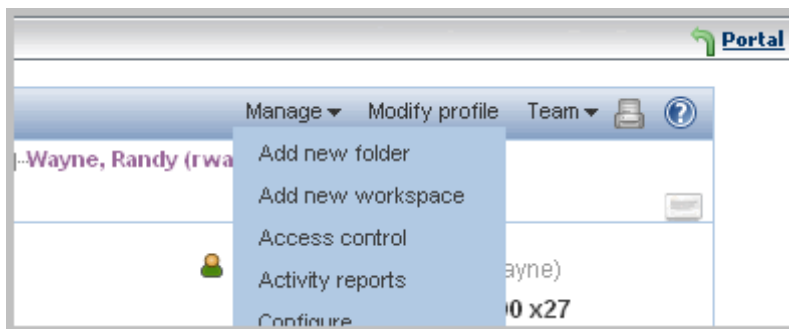
You can use your personal workspace to learn Novell Teaming collaborative features before taking the next step of creating a team workspace. One way to do this is to create a folder and invite others to participate with you as teammates in the new folder. (For information about creating a team workspace, see [Section 2.3, "Creating a Team Workspace," on page 49.](#))

To create a team-oriented folder in your personal workspace:

- 1 Click the *My workspace* icon in the Navigator tools to view your personal workspace:



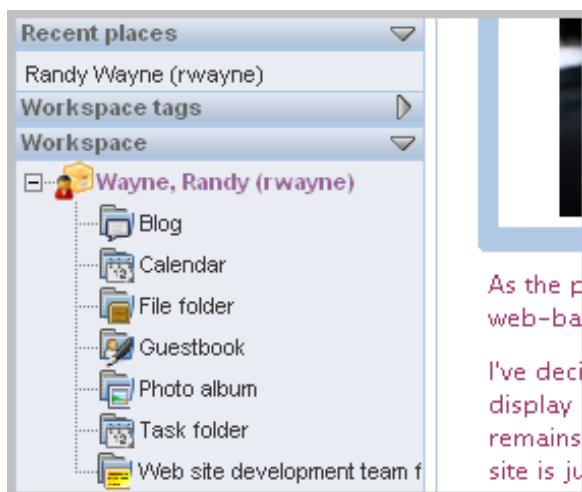
- 2 Click *Manage > Add new folder*:



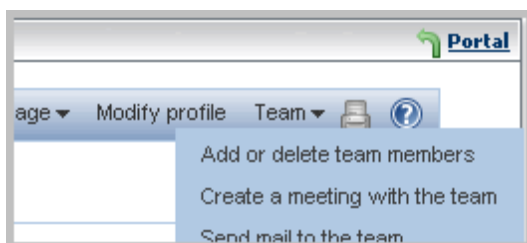
Novell Teaming displays a form that allows you to create a new folder.

- 3 Provide a title for your folder and select a type of folder (our example uses *Discussion*).
- 4 Click *OK*.

The new *Web site development team folder* folder now appears at the bottom of the *Workspace* section of the tools sidebar:

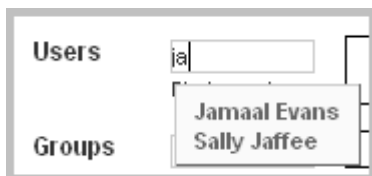


- 5 Click the link for your newly created folder.
- 6 (Optional) Add new entries.
- 7 In the management menu bar, click *Team > Add or delete team members*:



Novell Teaming displays a form telling you that the folder is not inheriting team settings and provides you with tools for specifying your teammates. Inheritance is helpful, because it makes many product features work automatically; if you want this folder for private use, then applying inheritance would be wise. In this example, however, you want to specify your teammates.

- 8 Type a few letters of either the first or last names of teammates, and click their linked names:



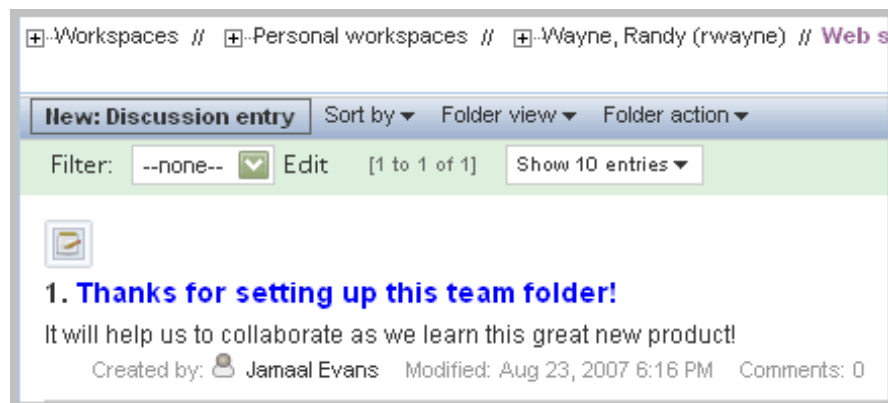
Repeat this step as often as you need to add all of your teammates.

- 9 Click *OK*.

Novell Teaming now allows teammates to participate in your newly created folder, instead of just being able to visit, as they do in other folders in your personal workspace. This means that teammates can take a more active role in the development of information in the folder. Following

our example, when Randy Wayne returns to the *Web site development team folder* in his personal workspace, a teammate (Jamaal Evans) might have authored an entry:

Figure 2-8 An Entry Added to Your Folder by a Teammate



You can use team-oriented folders in your personal workspace until you feel more comfortable with the product features. Then, you can create a team workspace.

2.3 Creating a Team Workspace

By default, anyone can create a team workspace (your site administrator will inform you, if the defaults are altered for your organization's installation). Create a team workspace when a collection of workspaces and folders would facilitate your team's mission.

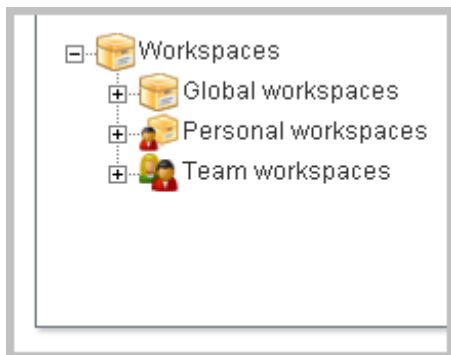
This section includes the following subsections:

- ♦ [Section 2.3.1, "Create the Workspace," on page 49](#)
- ♦ [Section 2.3.2, "Viewing Team Members," on page 50](#)
- ♦ [Section 2.3.3, "Communicating with Teammates," on page 51](#)
- ♦ [Section 2.3.4, "Allowing Visitors to Your Team Workspace," on page 51](#)

2.3.1 Create the Workspace

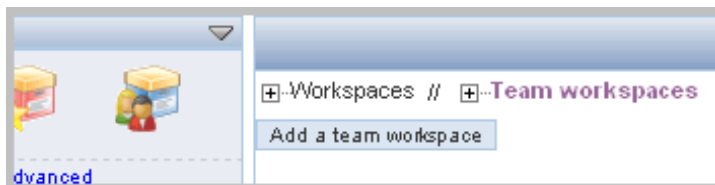
To create a team workspace:

- 1 On the portal page, in the workspace tree, click *Team workspaces*:



By default, all team workspaces are contained within *Team workspaces*. Your site administrator might instruct you to go to a different workspace to create your team workspace. If so, the remaining steps in the process are the same.

- 2 Click the *Add a team workspace* button, located just under the workspace tree toward the top of the page:



Novell Teaming displays a form used to create your team workspace.

- 3 Provide a title for your team workspace.
- 4 In the *Team members* section, use the type-to-find feature (typing a few letters as Novell Teaming supplies a list of links that match what you have typed so far) to specify your teammates.
- 5 In the *Workspace folders* section, select the check box next to the folders you want your team workspace to contain. (You can also add sub-workspaces and more folders later.)
- 6 (Optional) In the *Announcement* section of the form, click the checkbox and provide a message in the *Announcement text* box. Novell Teaming automatically sends the announcement text in an e-mail message to your teammates after you submit this form.
- 7 Click *OK*.

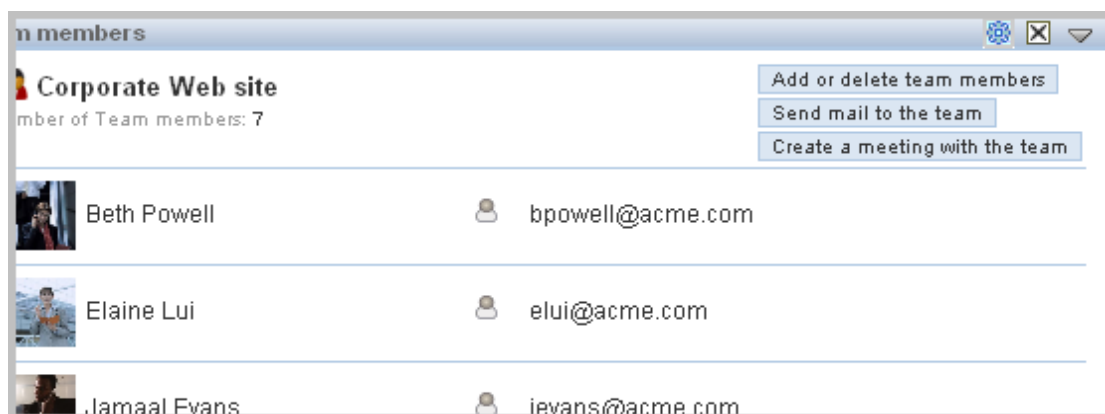
Tips for Team Workspaces

- ♦ As the owner of this workspace, you are primarily responsible for workspace administration. Examples of those tasks include creating other containers for information (sub-workspaces and folders), adjusting access control (which determines who can do what in the workspace), and providing some initial content to assist team members with getting started.
- ♦ Do not provide a large volume of content. For the workspace to match the needs and style of your team, your teammates' active participation should contribute content and guide administrative decisions.

2.3.2 Viewing Team Members

By default, Novell Teaming includes a team-membership accessory on your workspace page, which shows you your teammates. Accessories are sections at the top of workspaces and folders that provide summary information for you. In this case, the accessory shows you a list of team members for the new team workspace. If you want to close an accessory to provide more room for viewing other contents of the workspace or folder, click the *Currently displayed* (down-arrow) icon toward the upper right corner of the *Team members* accessory panel:

Figure 2-9 Collapsing the Team Members Accessory Panel



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*.

2.3.3 Communicating with Teammates

In addition to having a workspace to contain more items, team workspaces allow for faster communication among teammates. To use team communication tools:

- 1 Click the *Team* menu on the management menu bar.
- 2 Click either *Create a meeting with the team* or *Send mail to the team*.

Teammates participate in meetings by using their Novell Conferencing clients.

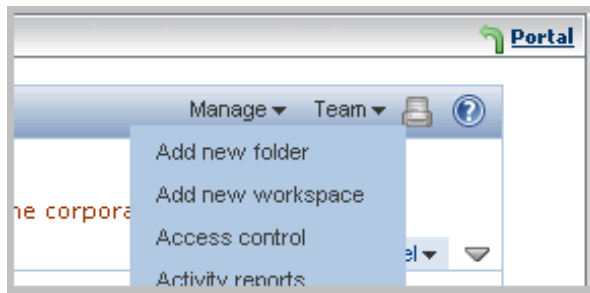
2.3.4 Allowing Visitors to Your Team Workspace

By default, only team members can view and participate in the workspaces and folders contained in the team workspace. There might be times when you want to allow other people to visit your team workspace (which, by default, means that they can read entries and comment on them, but they cannot create entries).

To allow visitors to your team workspace:

- 1 Sign in as the owner of the team workspace.
- 2 Navigate to your team-workspace page.

- 3 Click *Manage > Access control*:



Novell Teaming displays the *Configure access control* form for the team workspace.

- 4 In the *This folder...* section, if it is not set to *No* already, click the *no* radio button, and click *Apply*:

 A screenshot of the 'Configure access control' form. It contains the text: 'This folder does not inherit its access control settings from its parent folder.' Below this, it asks 'Inherit role membership from the parent folder or workspace?' with two radio buttons: 'yes' (unselected) and 'no' (selected). An 'Apply' button is to the right.

- 5 Click *Add a role > Visitor*:

 A screenshot of the 'Add user names from clipboard' form. The 'Add a role' dropdown menu is open, showing options: 'Participant', 'Workspace and folder administrator', 'Workspace administrator', 'Add a role' (highlighted), 'Site administrator', 'Team member', and 'Visitor'.

- 6 Toward the bottom-left portion of the form, click *Add a user*, and use the type-to-find feature to select a name:

 A screenshot of the 'Add a user' form. The 'Add a user' dialog box is open, showing a search field with 'ef' entered. Below the search field, a list of names is visible, including 'Efrain Gonzalez'. The main form has fields for 'User title' and 'User name'.

- 7 In that new user's row, select the check box in the *Visitor* column:

Add a user ▼	User title	User name	Participant	Visitor	Worksp admini
	Efrain Gonzalez	egonzalez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

- 8 Repeat Step 6 and Step 7 until you have added all your visitors.
- 9 Click *Save changes*.
- 10 Click *Close*.

The people for whom you selected the *Visitor* role have the right to view your team workspace and to add comments to existing entries. They cannot create new entries.

2.4 Using Advanced Search to Explore

When you perform a quick search, Novell Teaming searches all workspaces and folders. Use the Advanced search feature to perform more complex or finely tuned searches. For example, you can use the Advanced search tool to search only two, specific folders:

- 1 From either the navigator portlet or the navigator section of the tools sidebar, among the search tools, click *Advanced*:



- 2 Type the text that you are looking for (for example, `css`), and select the check box of one or more workspaces or folders to restrict the search:

The image shows a screenshot of an 'Advanced search' dialog box. At the top, there's a title bar with an information icon. Below it, there are input fields for 'Text:', 'Authors:', and 'Tags:'. The 'Text:' field contains the value 'css'. To the right of these fields is a 'List results' dropdown menu set to '10 items'. Below the input fields is a 'Places:' section with a tree view of workspace and folder structures. The tree includes 'Workspaces' (expanded), 'Global workspaces', 'Personal workspaces', 'Team workspaces', and 'Corporate web site'. Under 'Corporate web site', there are several folders: 'Files, Graphics for current site', 'Files, HTML and CSS for current site', 'Files, Miscellaneous', 'Files, White papers for the current site', 'General team discussion', 'Survey folder', and 'December 2008 redesign'. Checkboxes are provided for each item in the tree. The checkboxes for 'Files, White papers for the current site' and 'General team discussion' are checked. At the bottom of the dialog is a checkbox labeled 'Search all sub places'.

- 3 Click *Search*.

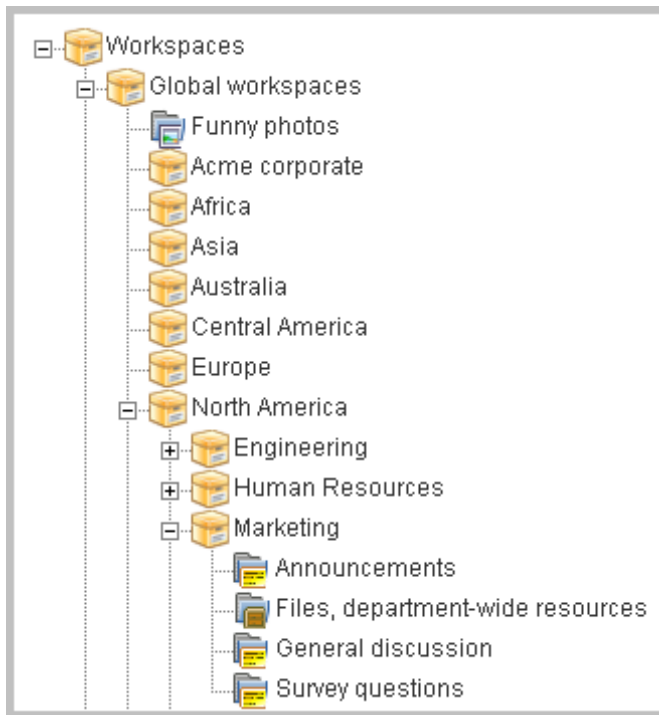
This advanced search returns links to only those items in the *Files, white papers...* and *General team discussion* folders that contain the string `css`. Summaries of items that match the search criteria appear just below the section shown in the previous graphic.

2.5 Using the Workspace Tree to Explore

In addition to using search to explore workspaces and folders in Novell Teaming, you can open any workspace tree, and you can visit all the places allowing you to visit or participate. For example, your site administrator can use the *Global workspaces* container to create workspaces and folders for broader use throughout your organization.

The following graphic shows a possible set of workspaces and folders located in the *Global workspace*:

Figure 2-10 *Using the Global Workspaces Tree*



Features Overview

3

This topic provides a brief overview of most of the Novell Teaming tools, folder types (or “applications”), and workspaces.

This topic includes the following sections:

- ♦ [Section 3.1, “Tools,” on page 57](#)
- ♦ [Section 3.2, “Folder Types,” on page 74](#)
- ♦ [Section 3.3, “Workspaces,” on page 86](#)

3.1 Tools

This section describes various tools that enhance navigation, usability, knowledge management, and other aspects of Novell Teaming.

This section contains these subsections:

- ♦ [Section 3.1.1, “Accessories,” on page 57](#)
- ♦ [Section 3.1.2, “Favorites,” on page 65](#)
- ♦ [Section 3.1.3, “Tags,” on page 66](#)
- ♦ [Section 3.1.4, “Filters,” on page 67](#)
- ♦ [Section 3.1.5, “E-mail Notifications,” on page 68](#)
- ♦ [Section 3.1.6, “The Clipboard,” on page 69](#)
- ♦ [Section 3.1.7, “Entry-Reference Markup,” on page 70](#)
- ♦ [Section 3.1.8, “The Five Star Ratings Tool,” on page 72](#)
- ♦ [Section 3.1.9, “Workflow,” on page 72](#)
- ♦ [Section 3.1.10, “Novell Conferencing,” on page 73](#)
- ♦ [Section 3.1.11, “Accessibility Mode,” on page 73](#)

3.1.1 Accessories

Accessories are subsections of a workspace or folder page that enhance the use of Novell Teaming pages in various ways. Accessories do not contain new information; instead, they point to existing information, organizing and presenting it in a summarized way that can be helpful to you. This section presents examples of accessories to help you understand how you can use them.

This section includes the following subsections:

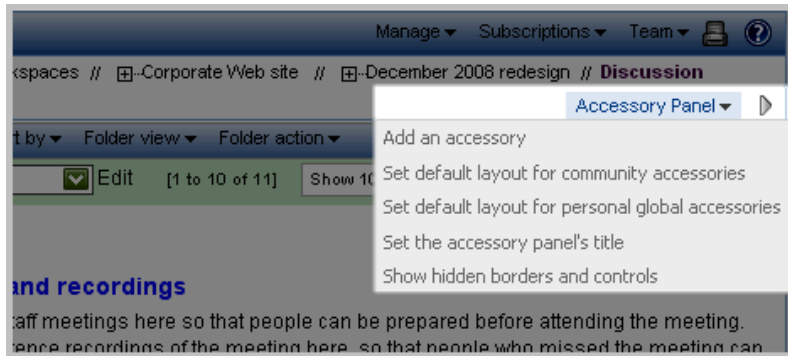
- ♦ [“Creating and Deleting an Accessory” on page 58](#)
- ♦ [“Adding an Accessory Visible on All Pages” on page 59](#)
- ♦ [“Adding an Accessory for One Page” on page 61](#)
- ♦ [“Positioning Accessories” on page 62](#)
- ♦ [“Establishing a Default Layout” on page 64](#)

- ♦ “Creating a “What’s New?” Accessory” on page 64

Creating and Deleting an Accessory

To create an accessory, click *Accessory Panel* > *Add an accessory*, which is located in the upper-right corner of the workspace or folder page:

Figure 3-1 The Accessories Icon and Drop-Down List



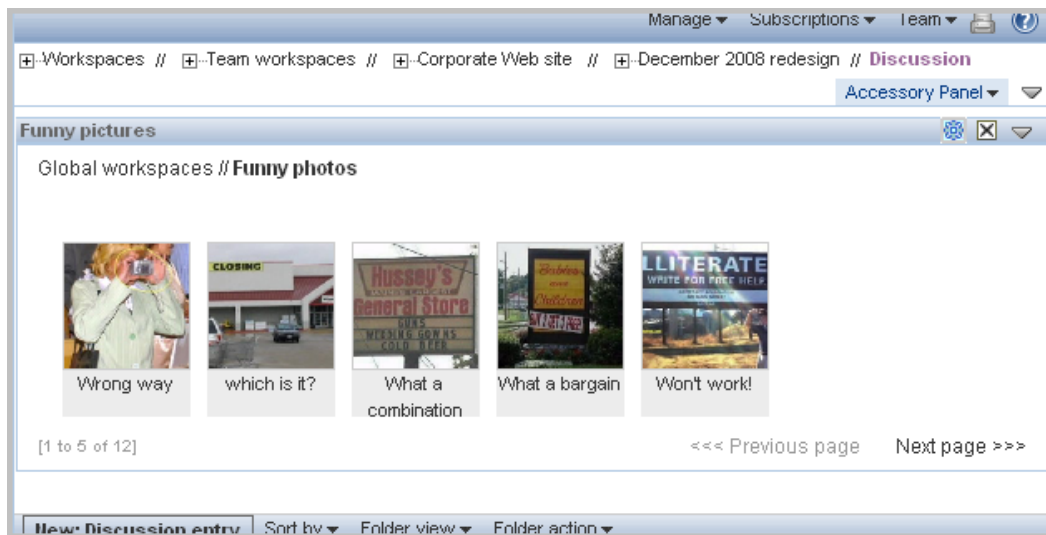
If you currently have no accessories, then the first menu item, *Add an accessory*, is the only one that appears in the menu. The remaining menu items affect default settings and the appearance of accessories.

In addition to the various types of accessories (photo gallery, search results, blog, and so on), there are categories that determine the scope of the accessory, as follows:

- ♦ **Personal accessory for this page only:** This accessory appears only to you and only on the currently displayed workspace or folder page.
- ♦ **Personal accessory for all workspaces and folders:** This accessory appears only to you, but it appears on all workspace and folder pages that you view.
- ♦ **Community accessory for this page:** This accessory appears only on this page, and it appears to everyone who views the current page. Only workspace and folder owners are allowed to establish community accessories.

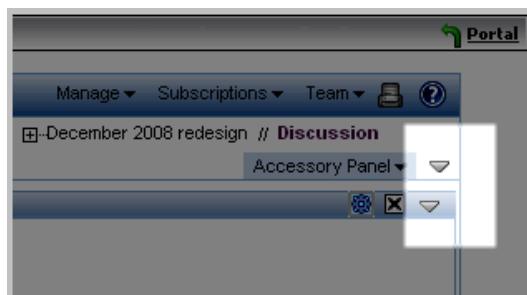
For folders, accessories appear above the folder content:

Figure 3-2 A Photo Gallery as an Accessory



To close an accessory or the entire accessories panel, click the appropriate *Currently displayed* (down-arrow) icon:

Figure 3-3 Currently Displayed Icons for an Accessory and Its Panel



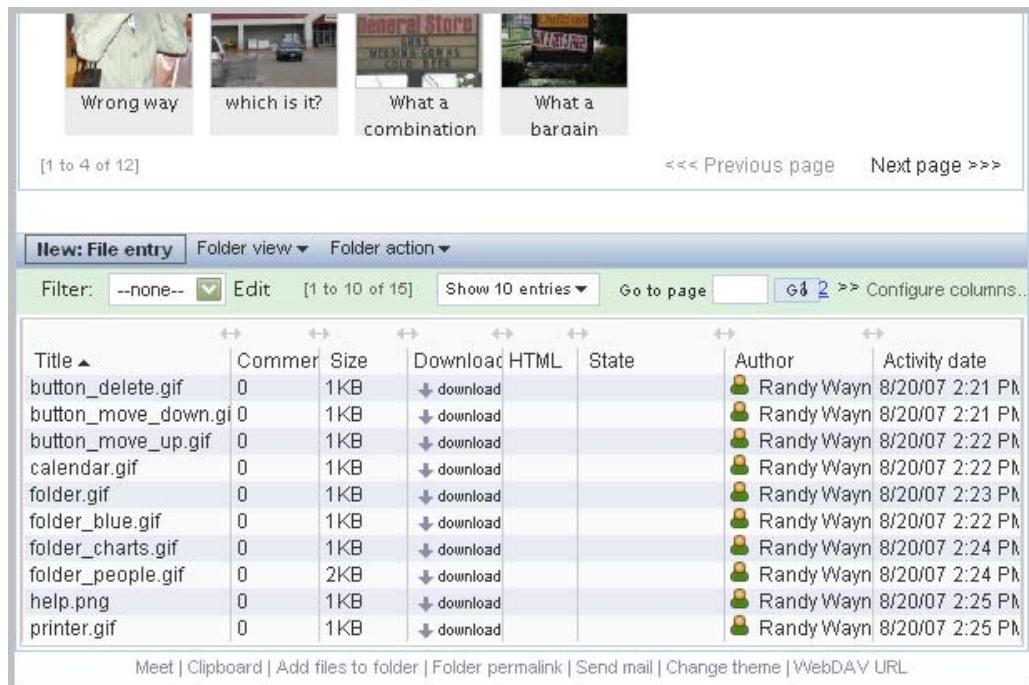
To delete an accessory, click the *Delete* icon (X). Remember that accessories do not contain information; they merely point to and summarize information that exists elsewhere. When you delete an accessory, you delete the pointer, not the source information. It is very easy to add the accessory again, if you mistakenly delete it.

Adding an Accessory Visible on All Pages

For example, assume that the company provides a photo gallery of amusing pictures in the *Global workspace* area, and one of the people in the installation, Randy Wayne, wants to have access to these pictures, no matter where he is within Novell Teaming. So, the user creates this accessory as a “personal accessory for all workspaces and folders.”

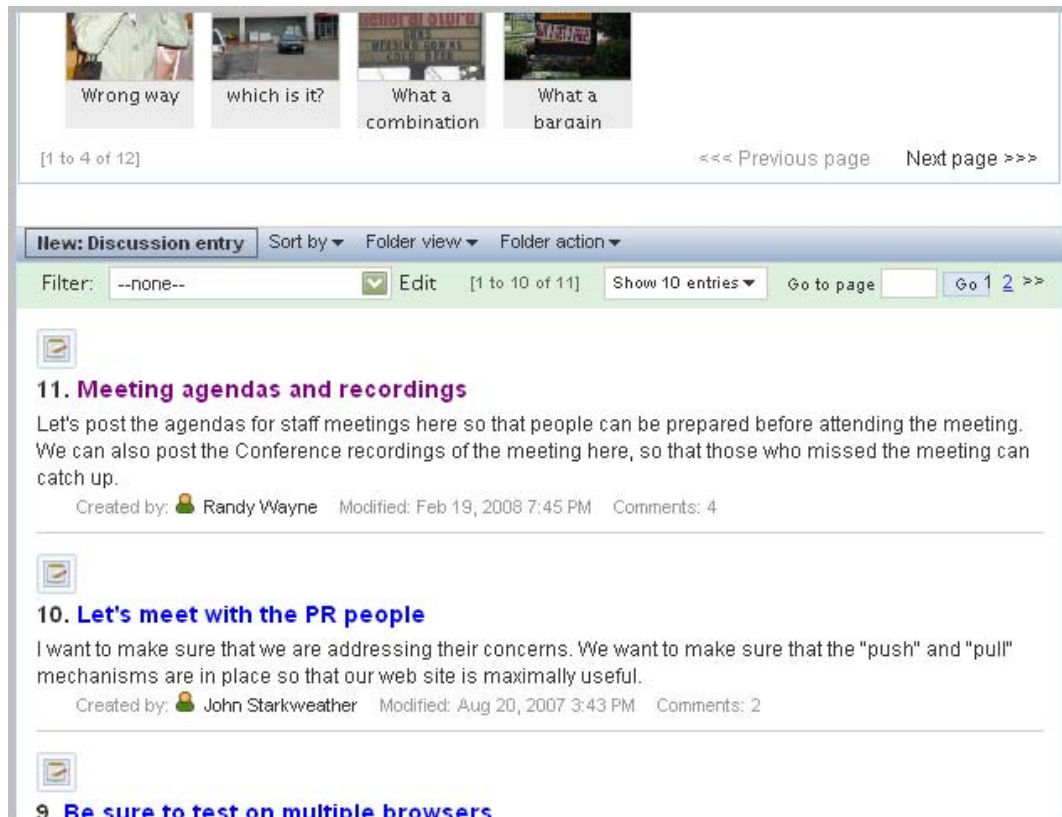
Now, the photo-gallery accessory appears when he views the file folder containing graphics for his Web site redesign work:

Figure 3-4 A Global Accessory Seen on a File Folder Page



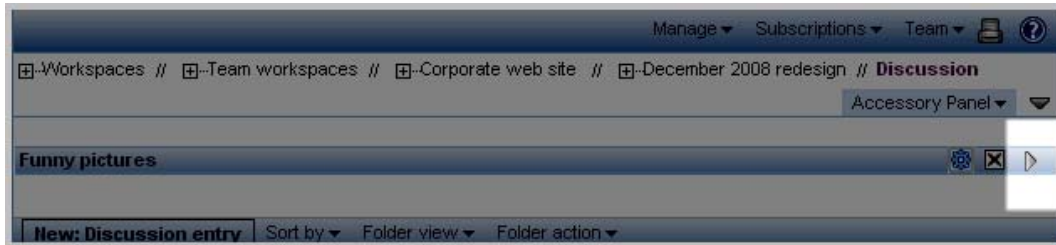
And it appears when he views the discussion folder for the Web site redesign effort:

Figure 3-5 A Global Accessory Seen on a Discussion Folder Page



To save room for viewing the content of the folder, Randy can close either just the photo-gallery accessory or the entire accessory panel. This close setting is “sticky”; it remains in effect for every page that this person views:

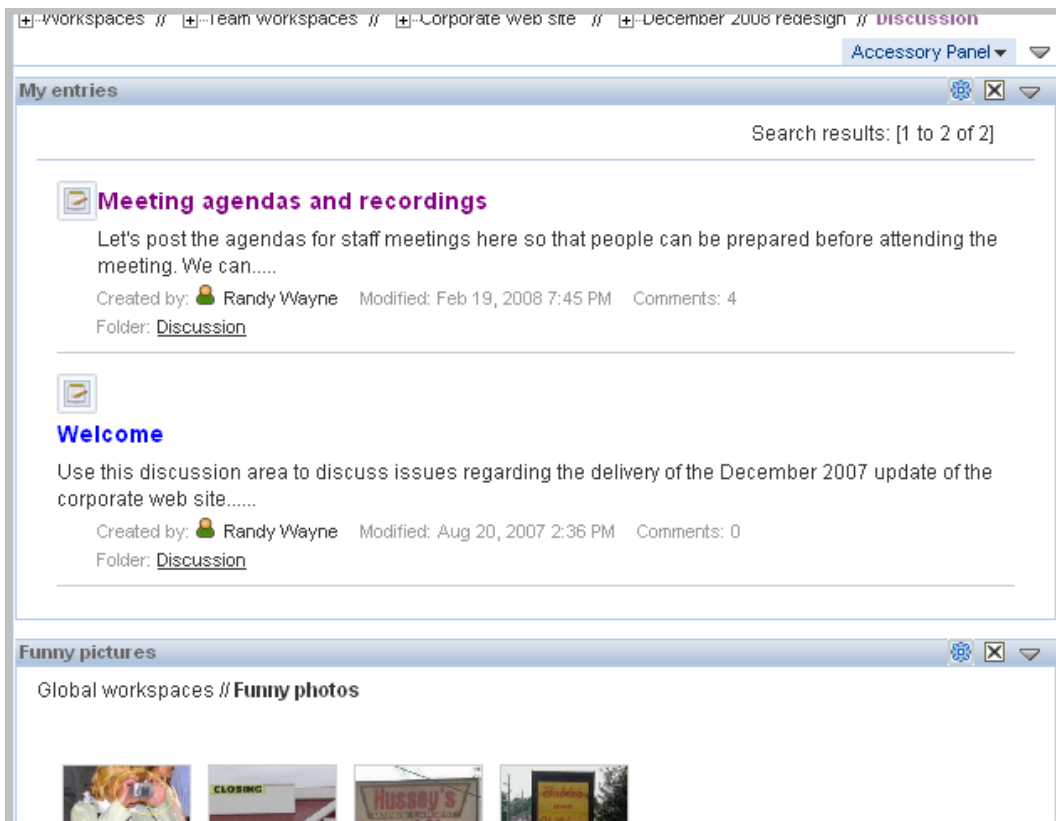
Figure 3-6 *A Closed Accessory*



Adding an Accessory for One Page

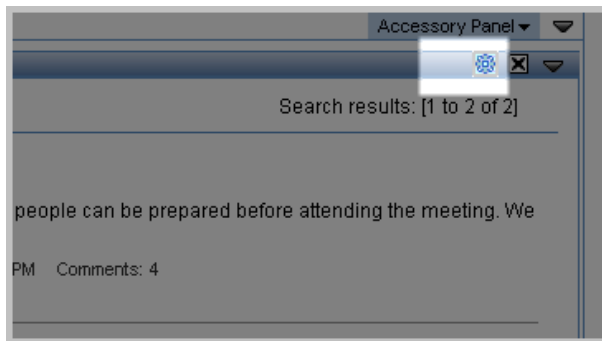
Suppose Randy Wayne continually wants to be able to review all of the entries that he authored in a discussion folder. He can create a Search-results accessory applicable to only that *Discussion* folder:

Figure 3-7 *A Search-Results Accessory for One Folder*



Randy can close the search-results accessory (or the entire accessories panel) to see the folder contents displayed closer to the top of the page. Finally, suppose that Randy wants to fine-tune the search criteria. To reconfigure an accessory, click the *Configure* icon:

Figure 3-8 *The Configuration Icon for an Accessory*



Positioning Accessories

While viewing Novell Teaming pages, you can drag and drop accessories within the accessories panel. Consider closed versions of the two accessories created in previous examples:

Figure 3-9 *Two Closed Accessories*



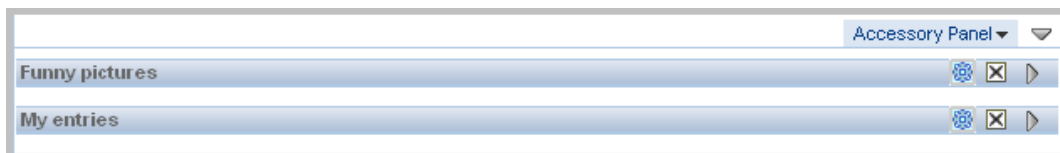
To move the *My entries* accessory below the *Funny pictures* accessory, click and hold the *My entries* title bar and drag it below the other accessory until you see a full-width, bright line indicating the new position (portals other than Liferay may display differently):

Figure 3-10 *Positioning an Accessory*



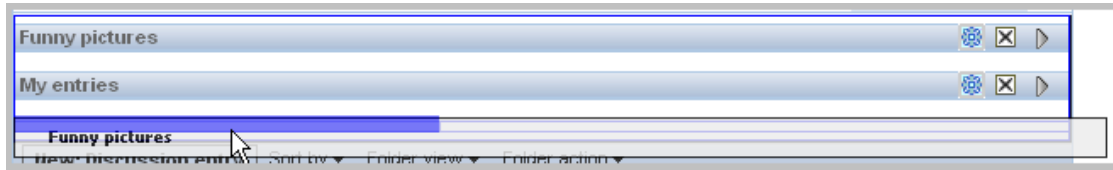
Drop the accessory in place by releasing the mouse button, and the accessory appears in its new position:

Figure 3-11 *The Two Accessories After Positioning*



You can also position accessories in two columns. To do so, click the title bar of one accessory, and drag it to the bottom of the accessories panel until you see a bright line whose width is half the panel:

Figure 3-12 Positioning an Accessory in One Column



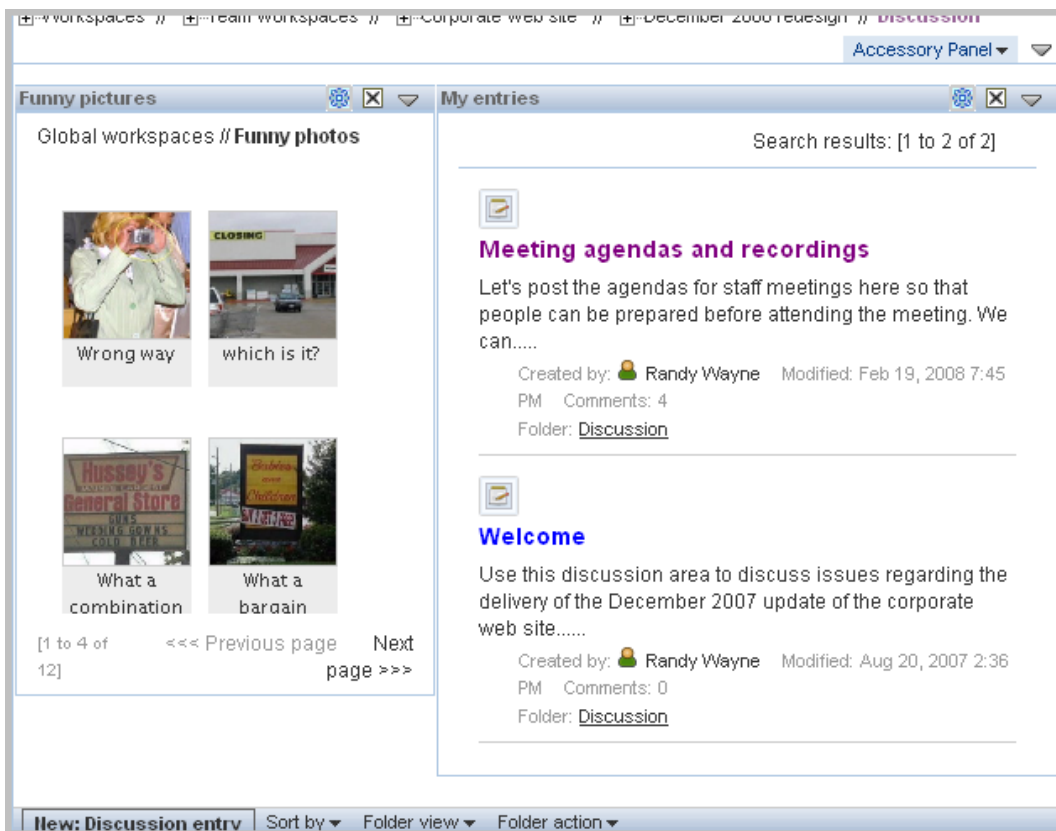
Drop the accessory into place by releasing the mouse button. Click and drag the second accessory so that a bright line appears in the next column:

Figure 3-13 Positioning an Accessory in the Other Column



After you open the two accessories, they now appear side-by-side:

Figure 3-14 Accessories Appearing in Two Columns



Establishing a Default Layout

When you create accessories for every page that you view or for a community-accessories panel, Novell Teaming provides a tools for arranging the order of the accessories within the panel. Using these tools, you can determine an optimal default order in which the defined accessories appear within the panel. (You can also personalize the order by dragging and dropping accessories within a community panel, as described in [“Positioning Accessories” on page 62.](#))

To affect the layout of a personal-global or a community accessory panel, use either the *Set default layout for community accessories* or *Set default layout for personal global accessories* tool:

Figure 3-15 Menu Items Affecting Accessory Layout



Novell Teaming displays the accessories in the reverse order in which they were created. Click the title bar of an accessory, drag it, and drop it into the position you want it to have. Repeat this action until the accessories are in the order that you want, and close the form.

Creating a “What’s New?” Accessory

Accessories have applications whose functions can expand beyond the default list of Novell Teaming folder types.

For example, once your installation contains a sizable amount of workspaces, folders, and entries, you may want a streamlined way to keep track of the most recently entered information in the installation, without having to check each workspace and folder individually. You can create an accessory to achieve this goal:

- 1 Add a Search Results accessory visible on all pages that you view.

After you specify that you want to create a Search Results accessory, Novell Teaming displays a form.

- 2 In the *Last activity in days* section, select a number of days (for example, 3 or 7 days).
- 3 Click *Apply*.
- 4 Click *Close*.

Novell Teaming displays in the accessory a “What’s new?” list, summarizing new or changed workspaces, folders, entries, comments, or attachments:

Figure 3-16 Example of a “What’s New?” Accessory



In an installation containing a large amount of information, you might want to track new activity in specific workspaces and folders. In this case, when you define the Search Results accessory, use the workspace tree to limit the search to specific places.

Also, in keeping with the Novell Teaming goal providing you with choices that match your work style, there are other ways to track the latest activity in the installation. If you prefer, you can:

- ♦ Use the bookmarks portlet on the main portal page, which lists workspaces and folders you want to track, and which lists the number of new and changed items in tracked folders.
- ♦ Create a Search Results portlet on the main portal page that performs the same search as described in this section.

If you want to check tracked workspaces and folders only when you first log in, then using a portlet is a better solution for you. If you want to track the latest changes no matter where you are in the installation, or if you want to be aware of changes moment to moment as you work within Novell Teaming, then the accessory is a better solution for you.

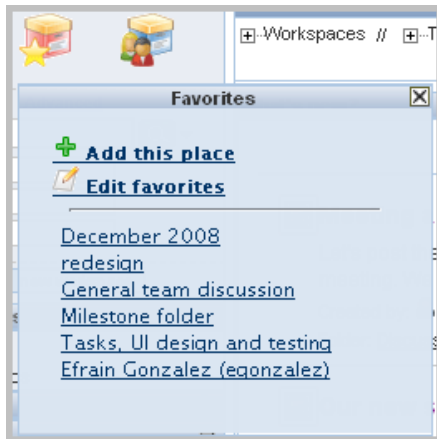
3.1.2 Favorites

The *Favorites* panel allows you to save links to your favorite pages. Because almost all Novell Teaming pages display the navigator tools (including the *Favorites* icon), you can access your favorite pages from almost anywhere.

The following graphic shows the *Favorites* panel after someone clicks the *Favorites* icon in the Navigation portion of the tools sidebar. Using this panel, you can click *Add this place* to add the

currently displayed page to the list of favorites, click *Edit favorites* to delete or position items in the list, or click a link in the list to view a favorite page:

Figure 3-17 *The Favorites Panel*

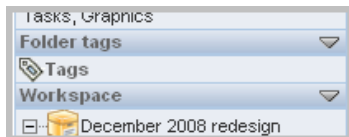


3.1.3 Tags

Tags provide an alternative way to categorize items, making it easier to navigate to and search for them later. Given our sample installation, there is a file folder that contains all of the graphics used in a Web site redesign. It might be helpful to tag the folder as containing artwork and icons.

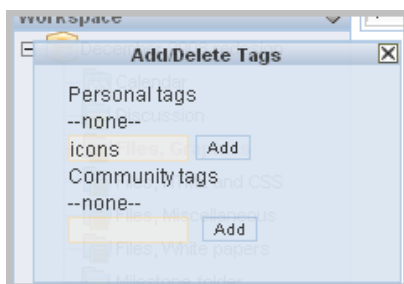
After viewing the file folder, locate the *Folder tags* section of the tools sidebar, and click the *Currently hidden* (right-arrow) icon. As a result, this is how the open *Folder tags* section appears:

Figure 3-18 *The Folder Tags Section of the Tools Sidebar*



Next, click the *Tags* icon, which displays the *Add/Delete Tags* panel. Finally, enter the personal tag name (in this example, *icons*), and click *Add*:

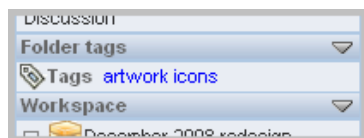
Figure 3-19 *Adding Tags to a Folder*



When you are finished adding all the tags you want, click the *Close* icon (*X*) in the upper-right corner of the panel.

The *Folder tags* section of the tools sidebar now includes a list of linked tag names, which is called a tag cloud:

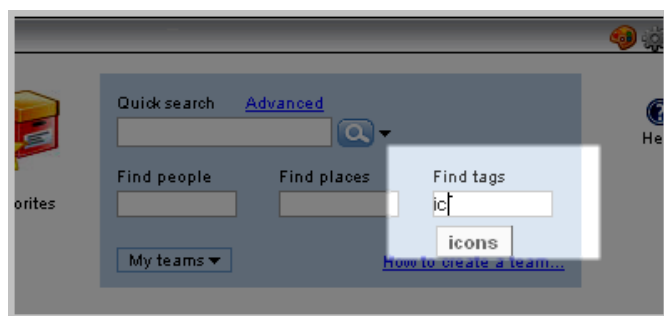
Figure 3-20 *Tag Links*



Both of the tag names (*artwork* and *icons*) are links. Click a tag name, and Novell Teaming searches for all items that have that tag applied to them and displays a search results page. Use your browser's *Back* function to return to the folder.

Also, in the *Find tags* text box in the navigator portlet, you can now search for items that have the tags you just created:

Figure 3-21 *Searching for Tagged Items*



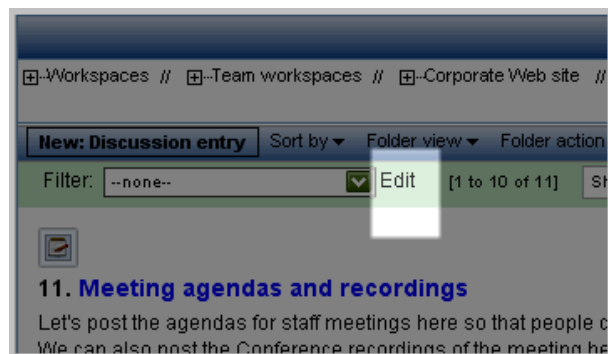
To remove a tag from an item, view the item, click the *Tags* link and icon, and click the *Delete* icon (X) next to the tag name.

If you are a workspace or folder owner, you can create community tags, which other people can use to search for items.

3.1.4 Filters

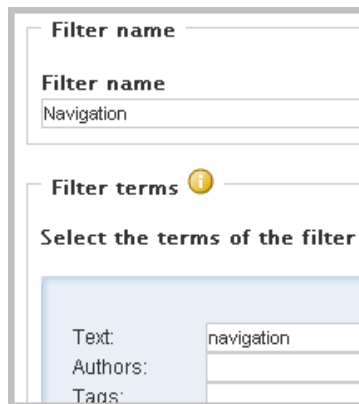
Filters allow you to see only the subset of folder entries that most interest you. To create a filter, view a folder, and click the *Edit* link next to the *Filter* drop-down list:

Figure 3-22 *Creating a New Filter*



For example, someone can create a *Navigation* filter that displays all of the Web site redesign entries in the discussion folder that contain the word *navigation*:


Figure 3-23 Search Criteria for the Filter



The screenshot shows a web form for creating a filter. It has two main sections: 'Filter name' and 'Filter terms'. The 'Filter name' section has a text input field containing the word 'Navigation'. The 'Filter terms' section has a heading 'Select the terms of the filter' and a table with three rows: 'Text:', 'Authors:', and 'Tags:'. The 'Text:' row has a text input field containing the word 'navigation'. The 'Authors:' and 'Tags:' rows have empty text input fields.

In the *Filter* drop-down list, you see only the filters that you create. When you select a filter, Novell Teaming displays only those entries that match that filter's search criteria. Notice in the following graphic that, after applying the *Navigation* filter, Novell Teaming displays only one entry, and it contains the words *navigation* and *navigational* in its title and description:

Figure 3-24 Applying the Filter



The screenshot shows the Novell Teaming interface. At the top, there is a 'New: Discussion entry' button and a 'Sort by' dropdown menu. Below this, there is a 'Filter:' dropdown menu set to 'Navigation' and an 'Edit' button. The main content area shows a single discussion entry with a blue icon, a title '8. Brainstorming the navigation', and a description 'I think our initial cut at a navigational scheme technology. Second, there seem to be too ma a bit and brainstorm...'. Below the description, it says 'Created by: Jamaal Evans' and 'Modified: Aug'. At the bottom, there is a link 'Meet | Clipboard | Add files to'.

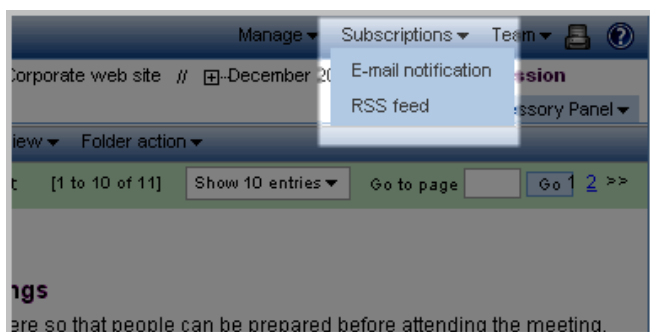
3.1.5 E-mail Notifications

Novell Teaming lets you use several ways to monitor activity in a folder. For example, you can see a count of unread entries in the bookmarks portlet, and you can set up an RSS feed. The most popular way of tracking activity in a folder is to receive e-mail notifications.

When you establish e-mail notifications, Novell Teaming sends an e-mail message to you, on a schedule determined by the owner of the folder, which summarizes changes to the entry and provides you with links to those entries. When you establish e-mail notification for a folder, the messages automatically include summaries of changes to all of its subfolders.

After viewing a folder for which you want to receive or modify e-mail notifications, click *Subscriptions > Email notification*:

Figure 3-25 *The Subscriptions Menu*



Novell Teaming dims the page and offers you several styles of e-mail notification:

- ♦ **Digest:** Novell Teaming sends one message that summarizes all of the activity in the folder and its subfolders (available for folders only).
- ♦ **Individual messages:** Novell Teaming sends one message for every new or changed entry. The e-mail messages do not include files that might be attached to the new or changed entries.
- ♦ **Individual messages with attachments:** Novell Teaming sends one message for every new or changed entry, and messages include attached files.

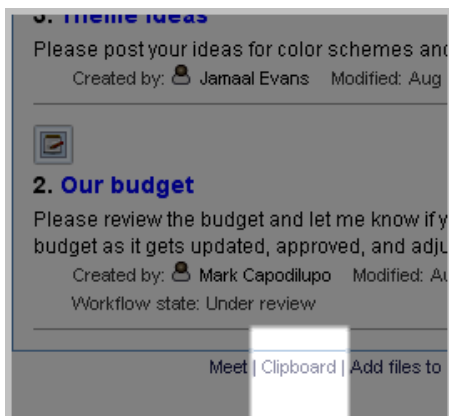
3.1.6 The Clipboard

The Novell Teaming clipboard is a tool that allows you to gather people's names as you visit places (workspaces and folders) within Novell Teaming. Later, when using a tool that requires people's names, you can retrieve names from the clipboard.

NOTE: The Novell Teaming clipboard is different than the windowing system's Clipboard that stores items until you paste them in another location. The rest of this section explains how the Novell Teaming clipboard works.

For example, someone can visit the discussion folder within a team workspace, scroll to the bottom of the folder page, locate the tools in the footer, and click *Clipboard*:

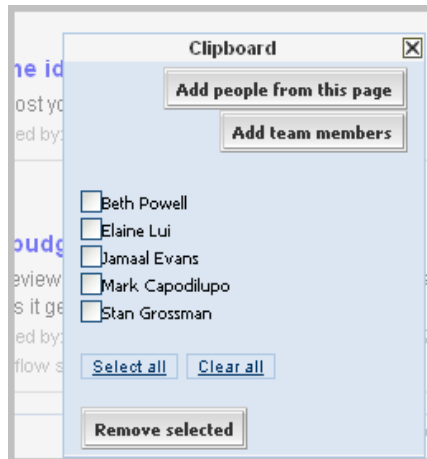
Figure 3-26 *The Clipboard Link*



Novell Teaming then displays the *Clipboard* panel. You can use buttons on this panel either to add the names of everyone who authored an entry or comment on the currently displayed page, or you can use them to add the names of all team members associated with the currently displayed page.

After adding and editing names, the clipboard might look like this:

Figure 3-27 *The Clipboard Panel*

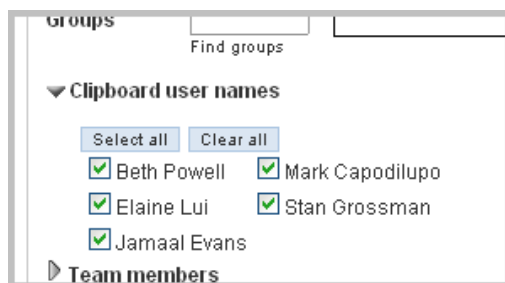


When you select the box next to names and then click the *Remove selected* button, Novell Teaming removes the checked names from the list and closes the *Clipboard* panel. You can also close the panel by clicking the *Close* icon (X) in the upper right corner of the panel.

Subsequently, a person can visit any number of places, possibly adding additional names to the clipboard as desired.

Finally, before signing out, someone can use the collected names and apply them to a task. The following graphic shows how you can retrieve some or all clipboard names while using the *Send mail* Novell Teaming tool:

Figure 3-28 *Clipboard Names on the Send Mail Form*



3.1.7 Entry-Reference Markup

When creating or modifying an entry, you can create a link to any other entry within Novell Teaming. The easiest way to create this link is to use a tool in the HTML editor. In our sample installation, in the wiki folder for the Website redesign project, you can reference other wiki pages. You can select text in the body of the entry, and click the *Markup* icon in the HTML editor toolbar:

Figure 3-29 *The Entry Reference Markup Icon*

Title
company history

Description

B I U ABC | [List Icons] | -- Styles -- | Paragraph | [Link Icon] | [Image Icon] | [Table Icon] | [Other Icons]

Acme was founded in Milwaukee, Wisconsin in 1927 by Alfred Molina. Mr. Molina's vision was to build a better widget, quicker and less expensive than his competitors.

(Someone help out and fill in the rest of the history, please. Randy.)

Parent links: home page

Novell Teaming displays a new window. In that new window, click the *Find* link:

Figure 3-30 *The Find Link*

Link to folder: (current folder) [Change]

Page name to link to: [Text Field] [Find]

Insert Cancel

Novell Teaming displays the *Find a page* panel:

Figure 3-31 *The Find a Page Panel*

Page name to link to: [Text Field] [Find]

Find a page: [Text Field] [X]

Next, use type-to-find to specify the title of an entry:

Figure 3-32 *Specifying a Page Name Using Type to Find*

Page name to link to: [Text Field] [Find]

Find a page: ho [X]

Home Page

Select the correct entry title, and click the *Insert* link. Novell Teaming inserts the link into the body of your entry.

This entry-reference markup tool also allows you to look for entry titles in other folders. To do so, click the *Change* link.

Finally, if you want to type the reference to another entry in the same folder, you can use the HTML editor to enclose the exact title of the entry within double brackets, as follows:

```
[[home page]]
```

Although you can use entry-reference mark-up in any folder, it is used heavily in wiki folders (see [Section 3.2.10, “Wikis,” on page 84](#)).

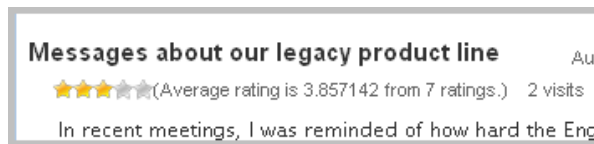
3.1.8 The Five Star Ratings Tool

Novell Teaming provides a rating system that allows you to see how other people have evaluated the content of an entry, on a scale of one star (not impressive or relevant) to five stars (very impressive or relevant).

To evaluate an entry, click the star that represents your evaluation. For example, to give an entry a rating of three stars, click the third star (left to right).

Novell Teaming indicates the average rating and the number of people who have rated the entry so far:

Figure 3-33 *The Five Star Ratings Tool*



3.1.9 Workflow

A workflow process is an online version of a business process (for example, ordering supplies, hiring new employees, requesting paid time off, and getting expense reimbursements). By creating custom forms and applying workflow processes, your Novell Teaming site administrator can use Novell Teaming folders as application platforms. Consult with your site administrators to determine if you have common business practices that can be automated by using your Novell Teaming installation.

As a folder entry moves through a business process, it enters states that provide a brief status for the entry. For example, a paid-time-off workflow process can have states such as Submitted, Approved, Denied, and Being Processed by Human Resources.

When you are viewing an entry that is progressing through a workflow process, and if you have permission, you can change its state by using a drop-down list and an *OK* button:

Figure 3-34 Changing an Entry's Workflow State



3.1.10 Novell Conferencing

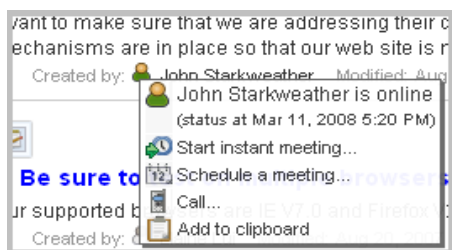
Novell Conferencing is a real-time collaboration tool that allows you to send instant messages, schedule online meetings, and have instant online meetings with people participating in your Novell Teaming installation.

The features of Novell Conferencing are described in separate documentation. However, the synchronous features (Novell Conferencing) and asynchronous features of Novell Teaming are integrated in helpful ways. As mentioned, Novell Teaming provides you with a buddy list portlet. Also, anywhere you see a person's name in Novell Teaming, you see that person's presence icon. Finally, at the bottom of a workspace and folder pages, you can quickly start an instant meeting with all teammates for that particular page, or with all people who have authored entries and comments on the current page.

NOTE: Your presence icon requires that you run the Novell Conferencing Pidgin client on your computer. Running other IM or chat software will not enable your presence icon. If your presence icon does not display color properly, see your site administrator for more information.

You are presented with contact options when you click someone's presence icon. This graphic shows the presence panel displayed when someone clicks John Starkweather's presence icon:

Figure 3-35 The Presence Panel



3.1.11 Accessibility Mode

Novell Teaming provides a mode of operation that is optimized for use with assistive devices, such as Web page readers that assist blind users. Accessibility mode complies with U.S. Section 508 and W3C international standards of accessibility.

To use Novell Teaming in accessibility mode, view your personal workspace. At the bottom of the page, click *Enable accessible mode*:

Figure 3-36 *The Enable Accessible Mode Link on a Personal Workspace Page*



3.2 Folder Types

Folder types define the type of activities that you do within a folder and how you do them. So, folder types can actually be thought of as applications, where each different type of folder functions as a separate “program” within Novell Teaming.

Most of the folder tools are common across all types of folders. Examples include most of the tools in the tools sidebar, accessories, subscriptions, team features, sorting, folder views, filtering, and basic folder-page navigation. The subsections that follow are ordered alphabetically and indicate some significant differences in the way a particular folder type functions.

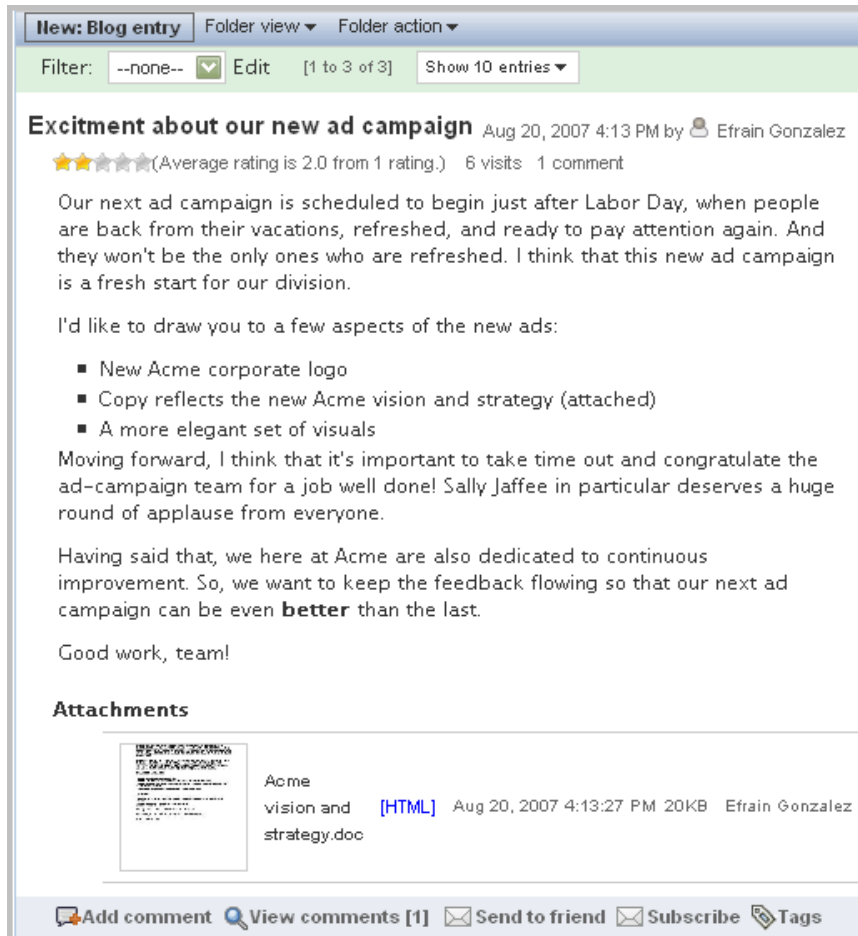
This section contains the following subsections:

- ◆ [Section 3.2.1, “Blogs,” on page 75](#)
- ◆ [Section 3.2.2, “Discussions,” on page 76](#)
- ◆ [Section 3.2.3, “Calendars,” on page 77](#)
- ◆ [Section 3.2.4, “Guestbooks,” on page 79](#)
- ◆ [Section 3.2.5, “File Folders,” on page 80](#)
- ◆ [Section 3.2.6, “Milestone Folders,” on page 80](#)
- ◆ [Section 3.2.7, “Photo Albums,” on page 81](#)
- ◆ [Section 3.2.8, “Surveys,” on page 82](#)
- ◆ [Section 3.2.9, “Tasks,” on page 84](#)
- ◆ [Section 3.2.10, “Wikis,” on page 84](#)

3.2.1 Blogs

Blogs are chronologically listed journal entries. Blog entries resemble discussion-list entries:

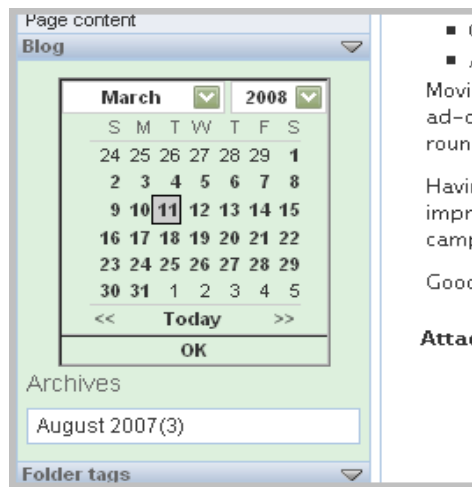
Figure 3-37 A Blog Entry



When you first view a blog folder, Novell Teaming displays all entries, from the most recently authored to the oldest (reverse chronological order).

For blog folders, the tools sidebar includes a Blog section that you can use to filter the display of blog entries:

Figure 3-38 *The Calendar and Archive Tools for a Blog*



The Blog section of the tools sidebar in the previous picture includes a calendar tool and an *Archives* section.

The calendar tool allows you to begin the list of journal entries at a specific date. To specify a date, use the drop-down lists to select a month and year, and click the number of a day. After specifying a date, Novell Teaming lists all blog entries authored on or before the date, in reverse chronological order, with the entry authored closest to the specified date appearing as the first entry in the list. To return to the default list, click *Today*, located toward the bottom of the calendar tool.

The *Archives* section displays the linked names of months followed by the number of journal entries authored in those months. When you click the name of a month, Novell Teaming displays only that month's journal entries in reverse chronological order. To return to the default blog-folder display, click *Today* in the calendar tool. If you want to begin the list of journal entries at a date already displaying in the calendar, click *OK* in the calendar tool.

In the previous picture, none of the entries in the blog folder are tagged (see [Section 3.1.3, “Tags,” on page 66](#)). If one or more entries are tagged, then Novell Teaming places lists of the Personal and Community tags just below the *Archives* section. In those sections, click on a linked tag name to view in reverse chronological order only those blog entries tagged with that name. Again, to return to the default blog-folder display, click *Today* in the calendar tool.

3.2.2 Discussions

Discussion folders allow you to post entries and make comments about those entries. Previous topics in this document have described discussion folders, and shown pictures of their tools and pages (see [Section 1.3.3, “Viewing a Workspace or Folder,” on page 15](#)).

By default, if you choose, there are two views that are designed for use with discussion folders. A view is a page design used to display information (in this case, information about entries and comments in a discussion folder). For example, if you changed the view from its default of “list” to “table,” then this is how the discussion folder appears:

Figure 3-39 The Table View of a Discussion Folder

Number	Title	State	Author	Activity date
11.	Meeting agendas and recordings		Randy Wayne	3/7
10.	Let's meet with the PR people		John Starkweather	8/2
9.	Be sure to test on multiple browsers		Elaine Lui	10/
8.	Brainstorming the navigation		Jamaal Evans	8/2
7.	Our new source repository		Elaine Lui	3/7
6.	New vision statement and strategy		Stan Grossman	8/2
5.	Check out this white paper		Stan Grossman	8/2
4.	Web 2.0/Ajax issues		Beth Powell	8/2
3.	Theme ideas		Jamaal Evans	8/2
2.	Our budget	Under review	Mark Capodilupo	8/2

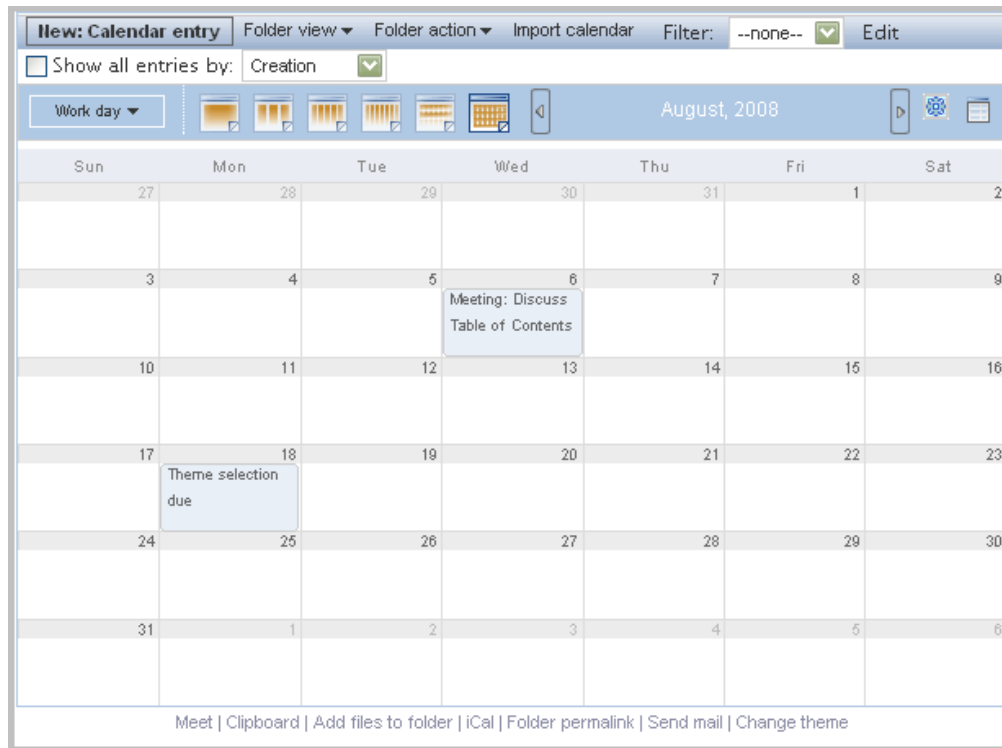
Meet | Clipboard | Add files to folder | Folder permalink | Send mail | Change theme

Titles of entries that have not yet been viewed are bold. Hover your mouse over a title, and Novell Teaming displays the full text of that title. Click, hold, and drag one of the double-arrow icons that are located above the horizontal lines in the table, and you can expand and collapse the width of the column. Click a column header (*Number*, *Title*, *State*, *Author*, *Activity date*), and Novell Teaming sorts the table by the values in that column.

3.2.3 Calendars

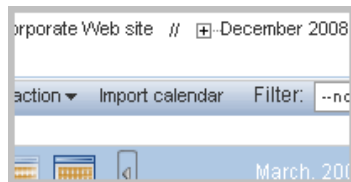
Calendars help you to keep track of time-ordered appointments or events. By default, a calendar folder displays a monthly view of events:

Figure 3-40 A Calendar Page



The menu bar contains a tool to import calendars:

Figure 3-41 The Import Calendar Link



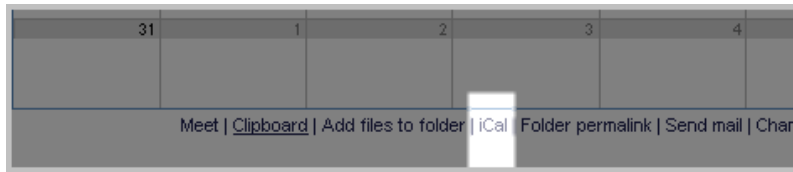
Most of the unique calendar tools appear under the menu bar:

Figure 3-42 Calendar Tools



The tool used to export Novell Teaming calendar data is located in the footer tools:

Figure 3-43 *The iCal Link*



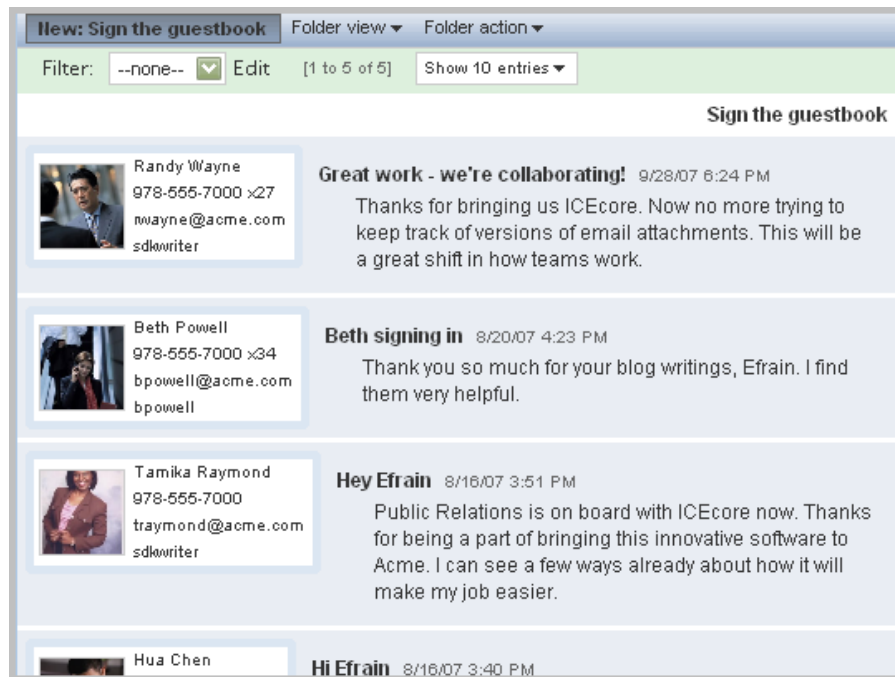
The following are some of the unique calendar tools:

- ♦ **Import calendar:** Allows you to import calendar entries in iCal format (for example, entries from Google and Outlook*).
- ♦ **Show entries by:** Changes the criteria used to place the event on the calendar from the default, which is the event date. This feature is most useful when viewing non-calendar information in a calendar view. For example, by default, you can view discussion entries in a calendar view, and then you can use this feature to show entries according to creation or the last activity date.
- ♦ **Work day:** Allows you to define a day as being a work day (defined by your site administrator) or as a full calendar day, which includes non-work days, such as weekend days.
- ♦ **Number of days (calendar pages):** Changes the number of days shown on a calendar folder page (the default is one month, thirty days).
- ♦ **Previous and next page (arrows):** Displays the previous set and next set of days. For example, if the calendar is currently displaying a month, these icons display the previous and next month of entries.
- ♦ **Calendar applet:** The square icon to the right of the next-page icon displays a panel showing the current month, which you can use to navigate to specific months or days.
- ♦ **iCal link:** This link allows you to export calendar entries in iCal format.

3.2.4 Guestbooks

Guestbooks are folders that allow visitors to sign in and announce their presence on a page. By default, personal workspaces contain guestbooks and accessories that show a summary of the guestbook entries. Given our sample installation, the guestbook shown in the following graphic is located in someone's personal workspace:

Figure 3-44 A Guestbook Folder



3.2.5 File Folders

File folders contain an alphabetized list of files in a table format. The table functions the same as the table view described in the discussion-folders section (see [Section 3.2.2, "Discussions,"](#) on [page 76](#)). Consider the following:

Figure 3-45 A Folder File

The screenshot shows a web interface for a folder file. At the top, there's a header with "New: File entry", "Folder view", and "Folder action". Below this is a filter section with "Filter: --none--", an "Edit" button, and "[1 to 10 of 15]". A "Show 10 entries" dropdown is also present. The main content area is a table with the following columns: Title, Comment, Size, Download, HTML, State, Author, and Activity date.

Title	Commer	Size	Download	HTML	State	Author	Activity date
button_delete.gif	0	1KB	download			Randy Wayne	8/20/07 2:21 PM
button_move_down.gif	0	1KB	download			Randy Wayne	8/20/07 2:21 PM
button_move_up.gif	0	1KB	download			Randy Wayne	8/20/07 2:22 PM
calendar.gif	0	1KB	download			Randy Wayne	8/20/07 2:22 PM
folder.gif	0	1KB	download			Randy Wayne	8/20/07 2:23 PM
folder_blue.gif	0	1KB	download			Randy Wayne	8/20/07 2:22 PM
folder_charts.gif	0	1KB	download			Randy Wayne	8/20/07 2:24 PM
folder_people.gif	0	2KB	download			Randy Wayne	8/20/07 2:24 PM
help.png	0	1KB	download			Randy Wayne	8/20/07 2:25 PM
printer.gif	0	1KB	download			Randy Wayne	8/20/07 2:25 PM

At the bottom, there's a navigation bar with links: "Meet | Clipboard | Add files to folder | Folder permalink | Send mail | Change theme | WebDAV URL".

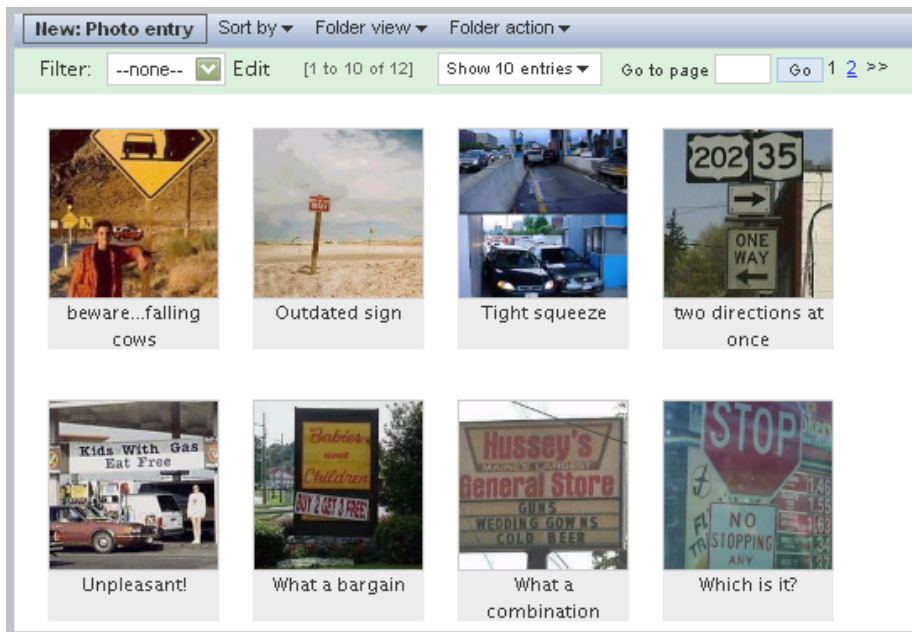
3.2.6 Milestone Folders

A milestone folder tracks the progress of several task folders. Although you can use milestone folders outside of the scope of a project workspace, they are most often used in those workspaces. See [Section 3.3.4, "Project Workspaces,"](#) on [page 88](#) for more information.

3.2.7 Photo Albums

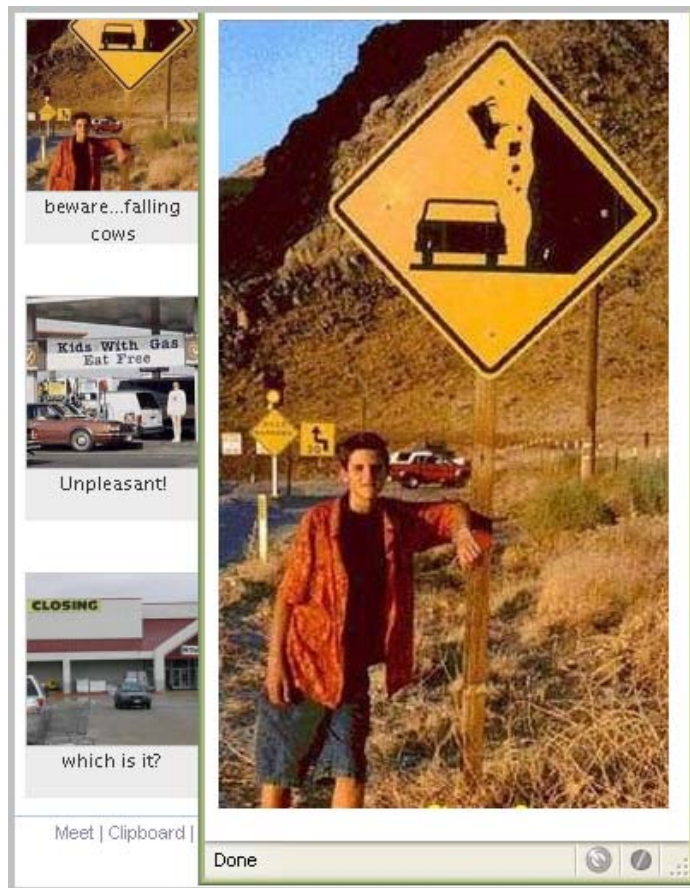
Photo albums display pictures. The sample installation includes a set of humorous pictures placed in a photo album in the *Global workspace* area:

Figure 3-46 A Photo Album



When you click a thumbnail picture, Novell Teaming displays the full-sized photo in a separate window:

Figure 3-47 *Viewing a Picture in a Photo Album*



3.2.8 Surveys

Survey folders present polling questions to teammates. To participate in a survey, view the survey folder, and click the entry title of a survey. Next, provide answers to questions, and click *Vote*.

Given our sample installation, Marcelo Hernandez, Acme Events Manager, wants to poll his organization regarding which trade shows should be priorities for his organization. The survey is composed of the three different types of questions available using Novell Teaming surveys: a multiple-answer question, a single-answer question, and a write-in-response question.

In our sample installation, the first question allows you to specify more than one answer:

Figure 3-48 *Providing More Than One Answer to a Survey Question*

Survey title: Surveys to assist the Acme Events team | Author: Marcelo Hernandez | Due date: Dec 4, 2008 3:50 PM

Comment: 24 visits no comments

1. Surveys to assist the Acme Events team

Marcelo Hernandez Oct 9, 2007 3:58:40 PM

Modified by Marcelo Hernandez Feb 1, 2008 4:25:30 PM

The Events team can use your feedback on these issues.

Attachments

Due date Dec 4, 2008 3:50 PM

Survey

Which 2008 trade shows do you feel that Acme participation would yield the best return on investment (ROI)?

- 1. ☐ Chicago Expo Trade Show
- 2. ☐ FooBar International Trade Show
- 3. ☐ North American Producers Show

Is there one trade show that deserves more resources (is a higher priority) than the others?

The second question accepts only a single answer:

Figure 3-49 *A Question That Accepts Only a Single Answer*

3. ☐ North American Producers Show

Is there one trade show that deserves more resources (is a higher priority) than the others?

- 1. ☐ Chicago Expo Trade Show
- 2. ☐ FooBar International Trade Show
- 3. ☐ North American Producers Show
- 4. ☐ None should be higher priority
- 5. ☐ My write-in trade show should be highest priority

The third question requests a write-in response:

Figure 3-50 *Providing a Write-In Answer to a Question*

3. ☒ My write-in trade show should be highest priority

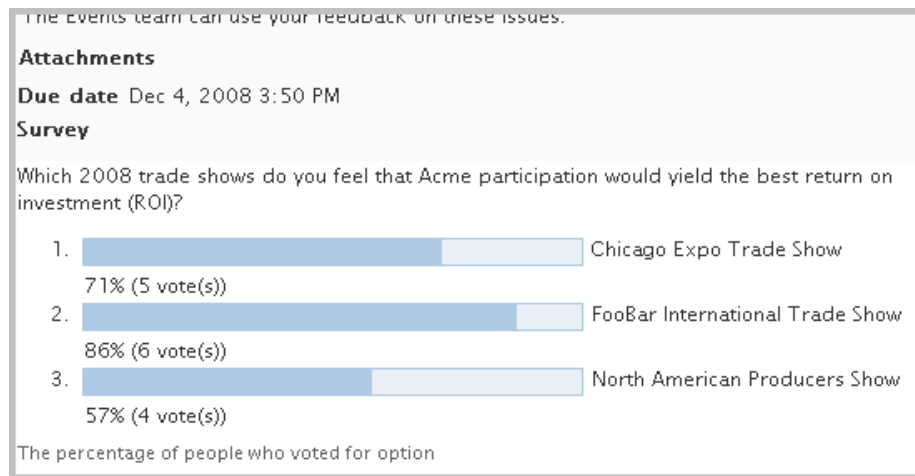
Please write in the names of other trade shows that you want the Acme Events team to consider.

South American Winter Expo

Vote!

After you have voted, you can check the results by viewing the entry again. This is an example of how people voted so far in response to the first question:

Figure 3-51 Survey Results for the First Question



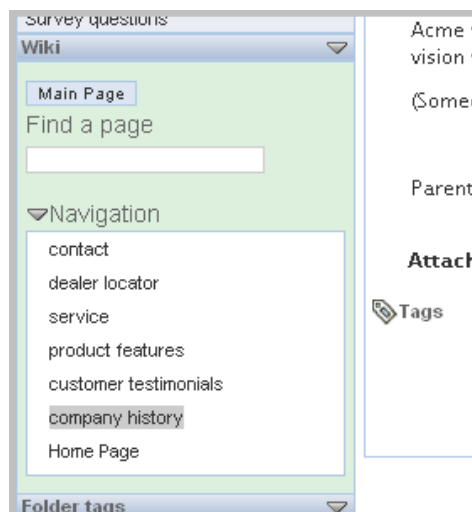
3.2.9 Tasks

A task folder keeps track of the progress made in completing work assignments. Although you can use task folders outside of the scope of a project workspace, they are most often used in those workspaces. See [Section 3.3.4, “Project Workspaces,” on page 88](#) for more information.

3.2.10 Wikis

Wikis are folders whose entries are coauthored by all participants in the folder. Wiki folders have additional tools in the tools sidebar:

Figure 3-52 Wiki Navigation Tools



Use the type-to-find feature in the *Find a page* text box. The *Navigation* section lists all of the pages in the wiki folder. The standard folder tool, *Show xx entries*, determines how many page titles are listed here by default. If there are more pages, then Novell Teaming displays a right-arrow icon in the bottom right corner of the *Navigation* box that allows you to move through lists of all the pages in the wiki folder.

By default, Novell Teaming does not display an entry when you first view a wiki folder. If you want an entry to display when someone first views the folder, click the *Set main page* link:

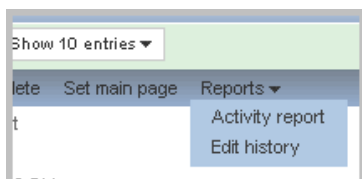
Figure 3-53 *Setting the Main Page of a Wiki Folder*



NOTE: When you create a wiki folder, be sure to configure the folder so that all entry titles must be unique.

When working with a wiki entry, it can be helpful to review edits that your teammates might have made to it. To review edits, view a wiki page, and click *Reports > Edit history*:

Figure 3-54 *The Edit History Menu Item*



Novell Teaming displays a new browser window. In that window, select the edit versions that you want to review, and click *Compare*. This graphic indicates that you want to compare version 1 of the document (as indicated by the selected radio button in the first column) with its fourth version (as indicated by the selected radio button in the second column):

Figure 3-55 *The Edit History Form*

The screenshot shows a window titled "Edit history". It contains a table with two columns: "Version" and "Data". The "Version" column lists versions 1 through 7, each with two radio buttons. Version 1 has the first radio button selected. The "Data" column shows timestamps for each version. At the bottom of the window are two buttons: "Compare" and "Close".

Version	Data
<input checked="" type="radio"/> <input type="radio"/> 1	▶ Mon Aug 20 18:59:20 GMT 2007
<input type="radio"/> <input type="radio"/> 2	▶ Mon Aug 20 19:02:06 GMT 2007
<input type="radio"/> <input type="radio"/> 3	▶ Mon Aug 20 19:23:47 GMT 2007
<input type="radio"/> <input checked="" type="radio"/> 4	▶ Tue Aug 28 20:20:44 GMT 2007
<input type="radio"/> <input type="radio"/> 5	▶ Wed Sep 19 14:14:37 GMT 2007
<input type="radio"/> <input type="radio"/> 6	▶ Wed Sep 19 15:52:07 GMT 2007
<input type="radio"/> <input type="radio"/> 7	▶ Wed Sep 19 15:53:59 GMT 2007

Compare Close

Novell Teaming displays a version of the entry that indicates additions and deletions between the two versions, and displays that information at the bottom of the *Edit history* window:

Figure 3-56 *Comparing Two Different Versions of a Wiki Entry*

The screenshot shows a window titled "Comparison of version 1 to version 4". It contains a text area with the following content: "home page", "Acme-Top quality...it's the Acme way", "When you think of quality widgets, you think of Acme. Since 1927, Acme has been the premier name in International widget ~~technology~~-technology. Our new Acme Product Suite provides solutions for all of your widget needs. Speak to an Acme Sales Representative today to find out more about this innovative set of products. Linked directly to { {titleUrl: binderId=278 title=company history text=company history}}". The text is color-coded: green for additions and red for deletions. At the top of the window are two buttons: "Compare" and "Close".

Compare Close

Comparison of version 1 to version 4

Showing additions and ~~deletions~~.

home page

~~Acme-Top~~ quality...it's the Acme way

When you think of quality widgets, you think of Acme. Since 1927, Acme has been the premier name in International widget ~~technology~~-technology. Our new Acme Product Suite provides solutions for all of your widget needs. Speak to an Acme Sales Representative today to find out more about this innovative set of products. Linked directly to { {titleUrl: binderId=278 title=company history text=company history}}}

3.3 Workspaces

This section describes different types of workspaces available in Novell Teaming.

This section contains the following subsections:

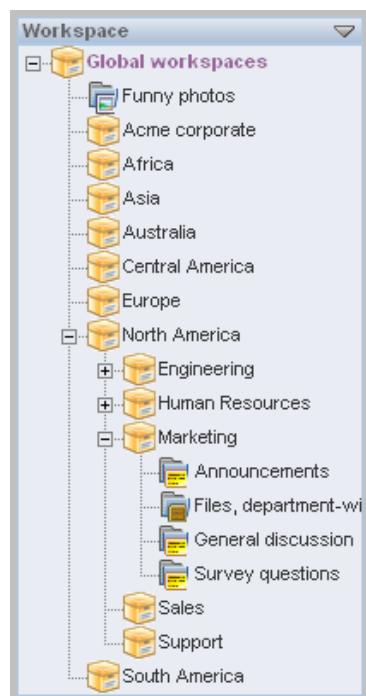
- ♦ Section 3.3.1, "Global Workspaces," on page 87
- ♦ Section 3.3.2, "Personal Workspaces," on page 87

- ♦ Section 3.3.3, “Team Workspaces,” on page 88
- ♦ Section 3.3.4, “Project Workspaces,” on page 88

3.3.1 Global Workspaces

Global workspaces contain information beyond the scope of teamwork that might be of interest broadly across your organization. Given our sample installation, the example in the graphic that follows shows how the Global workspaces can be structured for the fictional Acme company:

Figure 3-57 Structuring Global Workspaces By Geography and Then By Function



This example uses geography to organize the Acme company’s global information, and then uses departmental categories (*Engineering*, *Human Resources*, *Marketing*) to further organize the information. Depending on your organization, you might want to reverse the order (function followed by geography) or use some other organizational scheme.

NOTE: We strongly recommend that you limit the creation of Global workspaces. First, organic team creation is the more effective use model for this product. Second, we have worked with a significant number of customers who duplicated complex organizational charts in the structure of Global workspaces, and users found them to be confusing and unusable. Instead, populate the Global area with a minimal amount of information, and let users guide you as to a useful structure and content in this area.

3.3.2 Personal Workspaces

Personal workspaces provide a home page or start page for your work in Novell Teaming. Personal workspaces include contact information, a guestbook, pictures of you, your personal blog, and more.

Previous topics in this document describe personal workspaces (see [Section 2.2, “Modifying Your Personal Workspace,”](#) on page 34).

3.3.3 Team Workspaces

Team workspaces provide dedicated workspaces for a small group of people to coordinate their efforts and to collaborate.

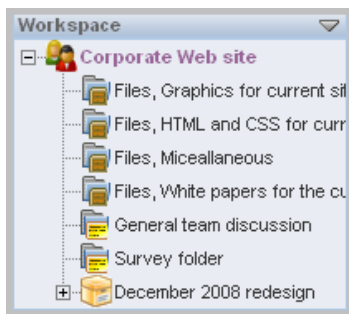
Previous chapters in this book describe team workspaces (see [Section 2.3, “Creating a Team Workspace,”](#) on page 49).

3.3.4 Project Workspaces

Project workspaces include special accessories that help a leader to track the progress of task completion for a potentially large project. Although project workspaces can contain any type of folder, they are specifically designed to work in conjunction with task and milestone folders.

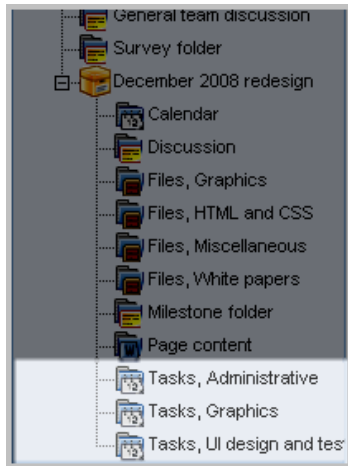
In our sample installation, there is a corporate Web site development team. This team has begun a project that requires them to redesign the web site for a December 2008 deadline. So, the team created a team workspace for general Web site teamwork, and, within that space, it created a project workspace for the Web site redesign:

Figure 3-58 A Project Workspace Within a Team Workspace



Within the *December 2008 redesign* project workspace, the project leader created standard folders (a discussion area and file folders for various types of files used in the project), a wiki folder to create page content for the Web site, and three task folders for several categories of work involved in this project effort:

Figure 3-59 Task Categories and Their Folders



Each task folder contains tasks that fit that task category. The next graphic shows a picture of a task folder:

Figure 3-60 A Task Folder

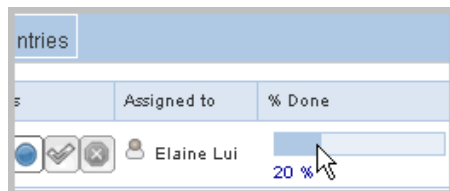


This is the *Tasks, UI design and testing tasks* folder. Novell Teaming produces the *Priority* and *Status* summaries, by using the individual task data provided in the table toward the bottom of the folder. For example, in the *Priority* summary toward the top of the previous graphic, 40% of the individual tasks are marked *Critical*, and 60% are marked *Medium*. If the assigned person or the project leader changes the priority value of an individual task, Novell Teaming recalculates the summary located at the top of the folder. Finally, Novell Teaming displays radio-button filters at the

top of the individual task listing that allow you to see only closed or active tasks, or allow you to see only tasks due today, this week, and so on.

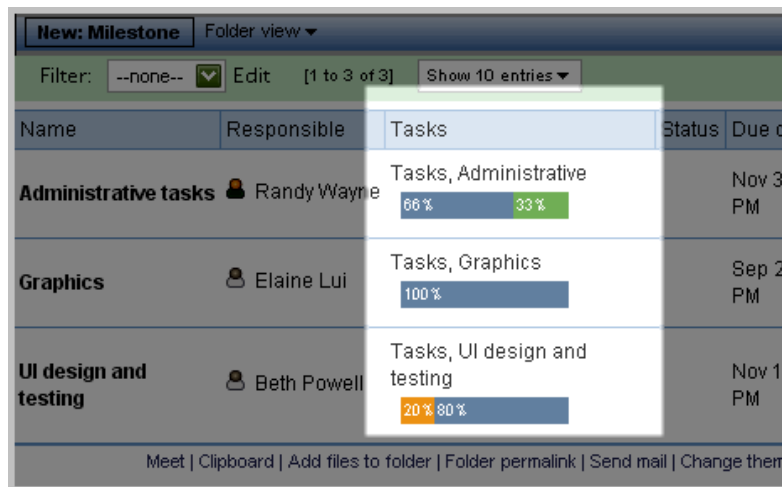
A designated individual can change the *Priority*, *Status*, or *% Done* value for a task right on the folder page. For example, if you mouse over the bar in the *% Done* column, Novell Teaming displays a percentage value that corresponds to the location of the mouse. When the appropriate percentage is displayed, click the mouse, and Novell Teaming adjusts the *% Done* value:

Figure 3-61 Changing the % Done Value of a Task



Individual task status in one task folder is rolled up into the summary for that folder. The status values for each task folder roll up again into the milestone folder:

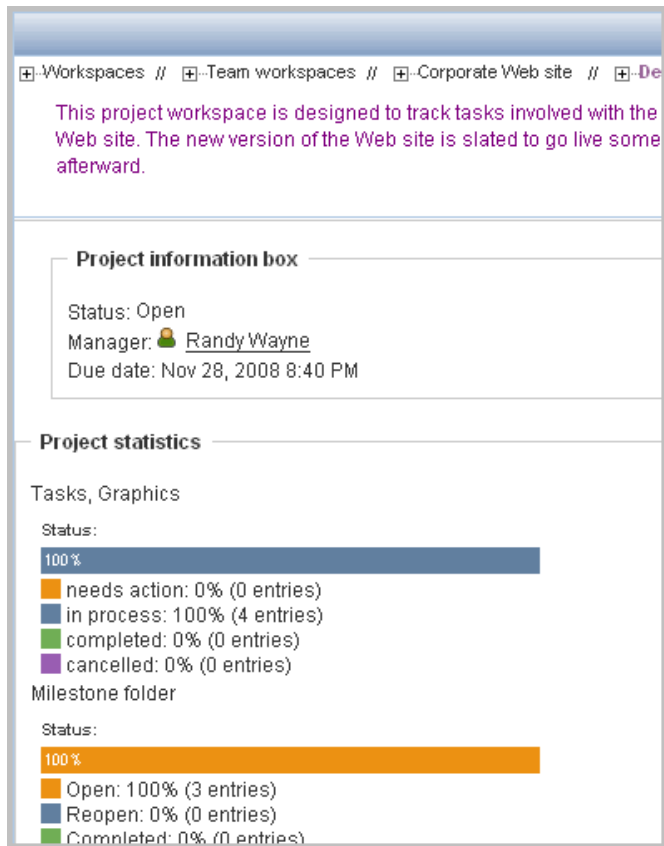
Figure 3-62 A Milestone Folder



The milestones folder provides a snapshot of the status of each of the three task folders in our sample installation. Mouse over the colors in the bar chart, and Novell Teaming explains the value (needs action, in progress, completed).

Finally, the information rolls up one more time, into the project-workspace page:

Figure 3-63 A Project Workspace Page



Troubleshooting

A

This topic provides guidance for difficulties you might encounter when using the Novell® application Novell Teaming.

A.1 WebDAV Link Does Not Work

Problem: When clicking the *Use this folder as a WebDAV folder* link in the footer tool bar or the icon used to attach a file using WebDAV, the WebDAV window does not function properly.

When using Windows XP and Internet Explorer Version 7.0 or higher, Novell Teaming activates the WebDAV link in the footer and the WebDAV icon used to attach files. If the administrator of the folder you are currently using did not properly configure the folder for use with WebDAV, then the WebDAV window does not function correctly. In order for a folder to enable WebDAV properly, it must be configured so that the names of all uploaded files are unique. To change this setting, the administrator can click *Manage > Modify this folder*.

A.2 Too Many Sign-Ins for WebDAV

Problem: When using WebDAV, you must specify your Novell Teaming username and password more than once.

This is proper behavior for WebDAV. WebDAV requires that you sign in each time you access a separate program (for example, your Web browser and Novell Teaming). It then might ask you to sign in again to access a file.

A.3 Not Understanding Mirrored Folders

Problem: You are not sure if you want to use mirrored folders, because you do not understand the concept or how they work.

NOTE: Mirrored folders are available only with the purchase of Novell Teaming Enterprise.

A mirrored folder is a library folder within Novell Teaming that is synchronized with a folder located outside of Novell Teaming, on a system drive. When performing basic actions (adding subfolders and files, modifying files, deleting folders and files) using either the Novell Teaming interface or by accessing the file on the drive, the change is reflected in the other interface. The advantage to using mirrored files is that you can apply Novell Teaming tools to files on a drive, which includes tools such as text search, workflow, and discussion (in the form of comments applied to the entry in the library folder).

Novell Teaming supports two types of external folders:

- ♦ A directory on a file system
- ♦ A folder on a SharePoint* server

Here are tips for using mirrored files:

- ♦ When specifying the path to the system folder, specify the full (absolute) path to the folder.

- ♦ After creating the mirrored folder, you cannot alter the pathname, and you cannot reconfigure the Novell Teaming library folder to be a non-mirrored folder.
- ♦ To initialize the new mirrored folder, click *Manage > Modify this folder*, and use the Synchronize tool.
- ♦ Do not attach additional files to entries in a mirrored folder. Behavior regarding additional attachments is unpredictable.
- ♦ Synchronization happens only manually by using the Novell Teaming menu items; Novell Teaming does not support scheduled synchronization. Synchronizing behaviors occur only upon using the Novell Teaming manual synchronization.
- ♦ When you delete a file on the server, Novell Teaming deletes the entire entry in the library folder (not just the attached file).
- ♦ Adding and deleting subfolders adds and deletes subfolders in the other system. When you delete a subfolder, you delete all of its contents in both places.

Glossary

This topic provides definitions for the Novell® application Novell Teaming. Items whose headwords include an “(a)” are more relevant for Novell Teaming site administrators.

access control

The tool that determines who has the right to perform which tasks in which places. See also [role-based access control](#).

accessibility mode

An optimized user interface that facilitates use by assistive devices, such as auditory readers.

accessory

A section located at the top of a workspace or folder page that provides a summary view, most likely of the information contained within the item. For example, an accessory can show all of the entries within a folder that are authored by someone designated as a subject-matter expert.

advanced search

Extra search tools that allow you to specify more specific criteria (such as the author of items or the specific location of items).

alias

See [e-mail alias](#).

attachment

A file attached to an [entry](#).

author

The person who created an entry and the entry's first owner. Ownership can be changed.

blog

A folder that contains a chronological listing of journal entries.

blog archive

A feature of blog folders that allows you to see entries authored in a specific month.

buddy list

A list of people whose [presence](#) you want to check and whom you contact frequently.

calendar

A folder containing entries for scheduled appointments.

clipboard

A tool that gathers people's names. Before signing out, when using a tool that requires names, you can take them from your clipboard.

comment

A reply to an **entry**.

community tag

A keyword **tag** applied to an item by the owner of a workspace or folder. Other users of the workspace or folder can perform searches based on community tags.

configuration (a)

A set of tools that alter the way information is presented. There are many types of configuration, ranging from setting allowable **views** for an item, selecting a color scheme, creating custom forms and views, and enabling workflow processes.

default view

The **configuration** of the information you see when you first view a workspace or folder. Some items might be configured to allow alternate **views**, which you can select.

definition (a)

A set of elements for both the **form** and **view** of a workspace, folder, or entry.

designer (a)

A tool used to create **definitions** or **workflow processes**.

discussion

A folder whose entries are discussion topics and comments about those topics.

e-mail alias

An alternative e-mail address for an e-mail account. To enable e-mail posting into a folder, you must provide an e-mail alias for the one account used to post into all folders in your Novell Teaming installation. Consult with your Novell Teaming site administrator for further assistance; site administrators, consult with the IT person responsible for creating e-mail accounts to create new aliases.

e-mail notification

An e-mail message that Novell Teaming sends indicating new or changed entries in a folder and its subfolders.

entry

An item in a folder.

favorites panel

A tool used to save links to workspaces and folders most important to you, providing a method of accessing these places quickly.

file folder

A folder whose entries are configured to highlight an attached file and to facilitate file management.

filter

A setting that limits a **folder** listing to only the entries that match the filter's search criteria. For example, you can create a filter that shows only the contents of a folder authored by you or that were created past a certain date.

folder

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

form (a)

An HTML form used to create a workspace, folder, or entry.

global workspace

A **workspace** that, by default, allows everyone in your organization to participate.

guestbook

A **folder** or **accessory** whose entries indicate who has visited the place.

help mode

The Novell Teaming Help system, which displays a dimmed page and information icons ("i"). When you click on an information icon, Novell Teaming presents a panel of information about that section of the page.

inherit (a)

A process by which a workspace or folder automatically uses **configuration** settings from its **parent**.

instant message (IM)

A quick communication between teammates using the Novell Conferencing messaging software.

LifeRay (a)

The **portal** software within which Novell Teaming runs by default.

meeting

An online communication by teammates, using the Novell Conferencing messaging software. Novell Conferencing provides tools that assist with online meetings, such as people designated as running the meeting, a way for participants to "raise their hands," and a whiteboard.

milestone

A **folder** that, by default, summarizes the status of tasks in task folders as they relate to meeting **project** milestones.

navigator

A set of tools that you can use to go anywhere within Novell Teaming you want to go. The tools include "My **workspace**," "Favorites," viewing your **teams**, search, **Help**, and a **workspace tree**.

owner

Either the person who created the workspace, folder, or entry, or the person who is assigned ownership of the item.

parallel workflow process (a)

A set of **state** transitions that happen at the same time as other state transitions. A state in the main thread initiates the parallel process, and a state later in the main thread can wait for the completion of the parallel thread.

parent (a)

A workspace or folder that contains another workspace or folder. The item contained within the parent is sometimes called its child.

participant

An **access role** that, generally, by default, allows people to author entries in a folder and more.

permalink

A Web address (URL) for a workspace, folder, or entry that you can copy, paste, and send to teammates, so that they can access a page directly by specifying the address in their Web browsers.

personal tag

A keyword **tag** that you apply to an item, and that only you can see and use.

personal workspace

A workspace that serves as a person's home page in Novell Teaming, including contact information, pictures, a personal **blog**, and more.

photo gallery

A **folder** whose entries are pictures.

portal page

A Web page that can run various applications within sections of its page. For example, Google and Yahoo use portal pages. Sections within a portal page can display the local time, the local weather, your favorite stock quotes, and more.

portlet

A section on a portal page. Novell Teaming runs within portlets.

presence

A person's online status (online, away from the computer, offline, status unknown), represented in Novell Teaming by People icons of certain colors.

project-management workspace

A **workspace** configured to facilitate the tracking of tasks and completion of complex project work.

role-based access control

A mechanism that controls access by assigning people and groups to roles, and the roles determine the rights assigned to those people. See the online Help for a list of Novell Teaming default role definitions.

site administrator

The person or people who have the right to perform any task in the Novell Teaming installation.

state

See **workflow state**.

subscription

A way to track new or changed items in Novell Teaming.

tag

A keyword that you can apply to a workspace, folder, or entry to make it easier to find. See also **personal tag** and **community tag**.

task

A **folder** that, by default, contains entries that track progress in regard to completing an assignment.

team

An **access role** that, by default, allows people to **participate** in a workspace or folder, to do some minor administrative tasks, and to communicate easily with each other.

team workspace

A **workspace** that restricts participation to teammates.

template (a)

A set of default configuration settings used to create a new workspace or folder. A template includes at least one **definition**, **access control**, a possible hierarchy of defined items, and more.

type to find

A Novell Teaming tool that uses the characters you have typed so far to present a list of possible choices. This tool is active for text boxes whose values are within a defined set: for example, people, places (workspaces and folders), and tags.

view

A presentation of information. For example, you can view a discussion folder in either a list or table format. By default, most folders use one view (calendar folders use a calendar view, blog folders use a blog view, and so on).

visitor

An **access role** that, by default, allows people to read entries and make **comments** on them, but not create new entries.

WebDAV

The Web Distributed Authoring and Versioning protocol. If your system provides a tool that uses this protocol, it allows you to manage Novell Teaming file folder entries by using the WebDAV window.

wiki

A **folder** whose entries are authored by all **participants**.

workflow

An online representation of a business process (for example, document review, paid time-off requests, document sign-off, and so on). An **entry** can have an associated workflow process, which places the entry into various workflow states.

workflow state

A status label for an **entry** in a workflow process. A state determines who has the right to work with an entry (including who can see it), who needs to be notified, who needs to perform the next task, and which subsequent states are possible.

workspace

A container for folders and other workspaces.

workspace tree

A tool that allows you to navigate the hierarchy of workspaces, sub-workspaces, **folders**, and subfolders within Novell Teaming.