ICEcore™

Discover Cool Collaboration

User Guide →

ICEcore Version 1.0

SiteScape™
MAKES TEAMS WORK

Contents

About This Manual

This guide provides basic information for new users of ICEcore.

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

This guide contains the following topics:

Audience

This guide is intended for all new ICEcore users.

Software and Documentation Version

This guide describes features in ICEcore Version 1.0. This is Revision 1.0.2 of this guide.

Change History

This table documents changes for recent revisions to this guide:

Manual revision	Changes
Revision 1.0.2	• Demonstration of placing accessories into two columns ("Positioning Accessories" on page 60). • Clarification that presence icons require a running Pidgin client, which is a feature of ICEcore Conference (Section 2.1, "Setting Up Your Buddy List," on page 29).
Revision 1.0.1	• 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 62). • Graphics and a more detailed explanation of survey folders (Section 3.2.8, "Surveys," on page 80). • More information about filtering blog entries (Section 3.2.1, "Blogs," on page 73).

Additional Documentation

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

- ICEcore Help Mode
- *ICEcore Quick Start Guide*
- *ICEcore Installation and Configuration Guide*
- *ICEcore Administration Guide*

This document describes how to use ICEcore 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 *Add a team workspace* button. Click the *Getting Started* link.	Items that are clickable on the page, labeled user-interface items, and variable or replaceable text are presented in italic font.
Note: Remember that.... **Blog summary** - Provides a....	Many types of headers, and defined terms in a list are presented in bold font.
Open the `ManagerGuide.pdf` file. Type `status`, then press Enter.	Filenames and text that you must type are presented in `Courier` font.

Concepts and Navigation

1

Novell® provides the ICEcore 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 ().

This topic includes the following sections:

1.1 ICEcore Is Collaboration Software

Collaboration through ICEcore facilitates online work, creating a "virtual meeting space."

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

- You and your teammates can work together without 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 ICEcore, teamwork is ongoing and potentially never-ending.

- When you are working online at the same time, the "presence" feature of ICEcore allows you to see which teammates are currently online, and allows you to start a chat session by using ICEcore Conference, create an online meeting using ICEcore Conference, 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. ICEcore becomes a "pre-meeting" meeting.

- Documents are reviewed earlier in the process, which allows easier modifications and adjustments. ICEcore also makes it easier for more than one person to write a document, because of workflow processes that automate drafting and review, and because of ICEcore access control that easily designates writers and reviewers.

- Your collaborative process is preserved and publicly accessible in ICEcore. 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 ICEcore to locate historical information quickly and easily.

- Use various ICEcore tools in combination—a milestones folder, tasks, workflow, discussions, chat, online meetings—to track progress against goals for multiple teams working on a large project.

1.2 ICEcore Is Social Networking Software

The out-of-the-box ICEcore tools alone provide powerful enhancements to online collaboration. In addition, when you use tools in combination and apply structure to content design, ICEcore 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.com^{TM} 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, ICEcore Conference username, and so on). It enables searches for various subject-matter experts. Also, ICEcore 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 ICEcore 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.

- ICEcore 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.

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

After you sign in, you see a portal page:

Figure 1-1 *The Portal Page*
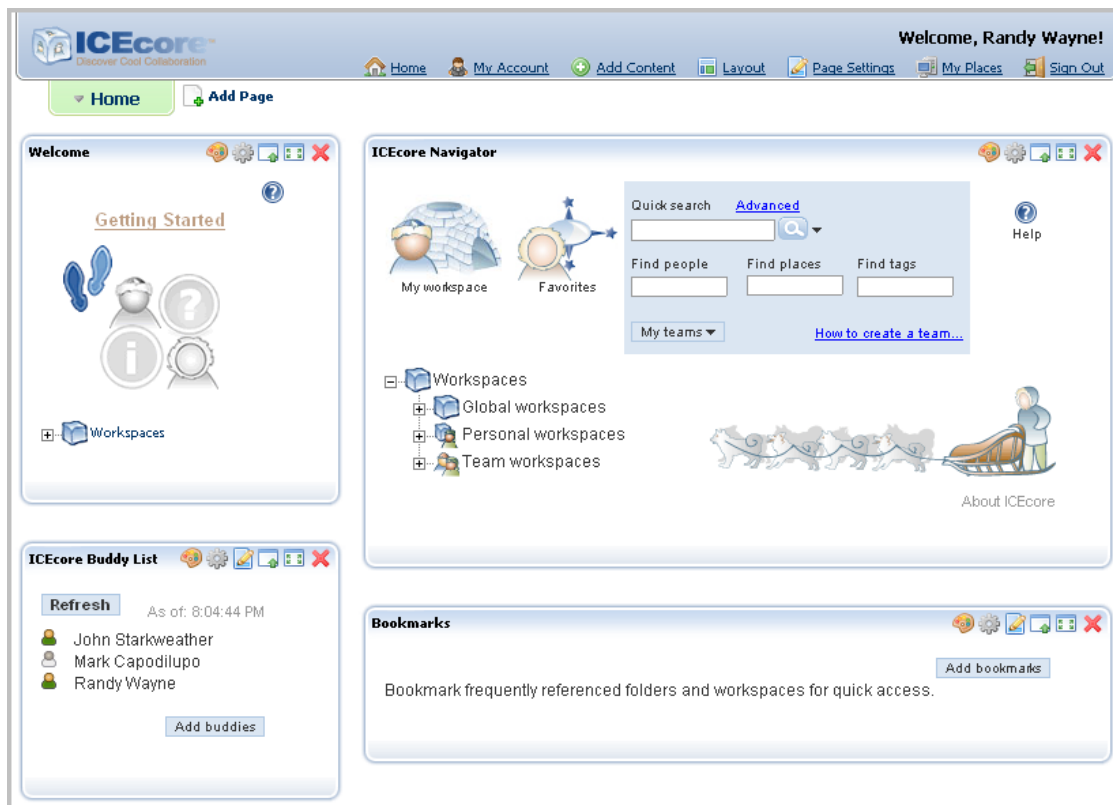
A portal page is a Web page that presents different applications in sections within the larger page. On the Internet, you might have seen pages (for example, Google* and Yahoo*) that have sections presenting a weather report that is local to your area, stock quotes that are of interest to you, the local time, and more.

By default, ICEcore 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 ICEcore, you do not need to use the portal's tools; we recommend that you use only ICEcore tools designed to affect the look and feel of ICEcore 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 ICEcore 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*
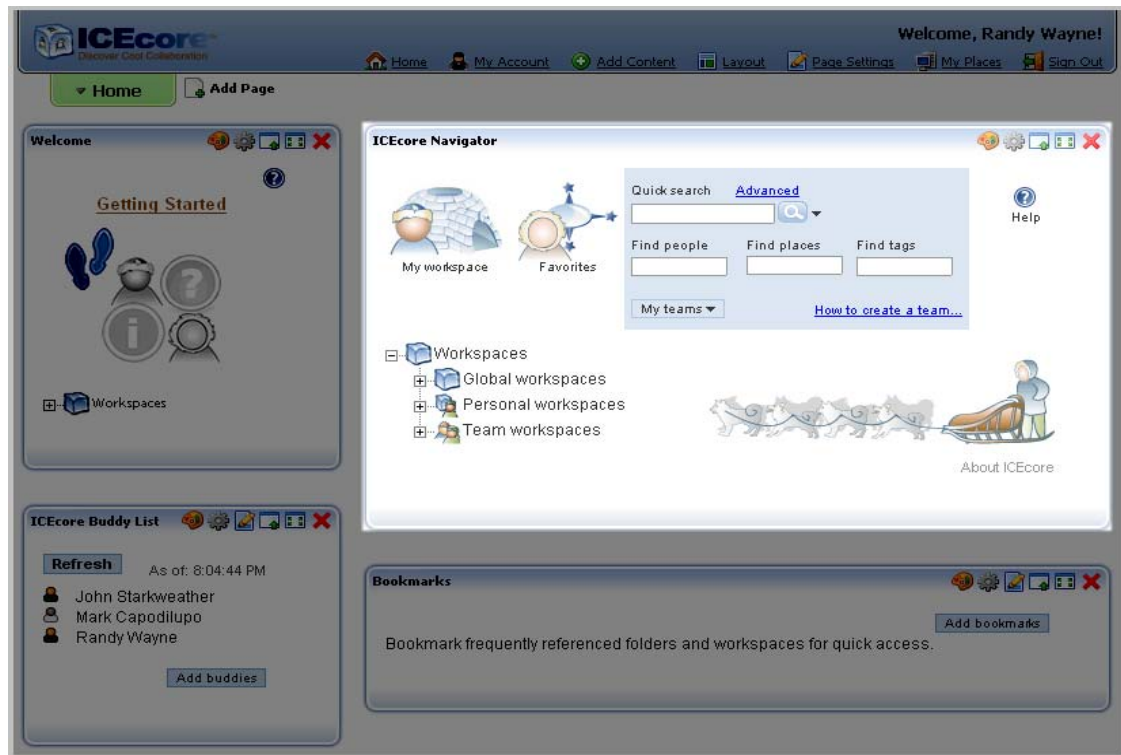
This section contains the following subsections:

1.3.1 The Default Portlets

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

- **The welcome portlet:** Provides quick access to getting-started PDF manuals, 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 ICEcore, 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.

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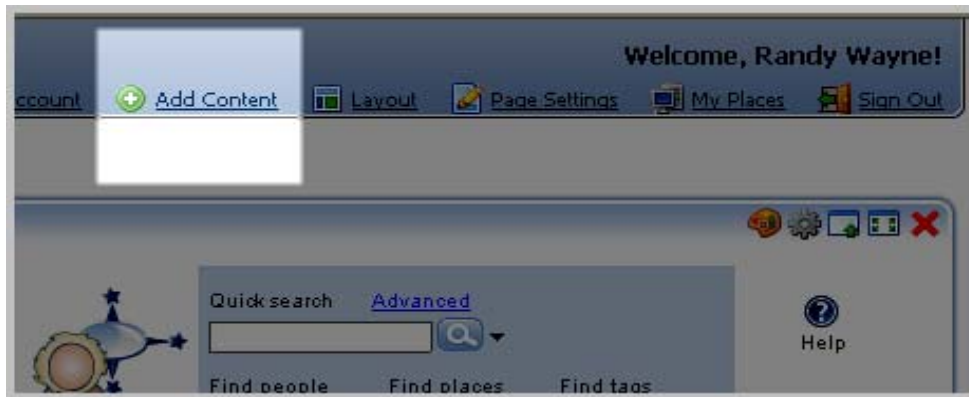
The portal software displays a list of all available portlets. Click the *ICEcore* link to see a list, which includes the non-default ICEcore portlets, as follows:

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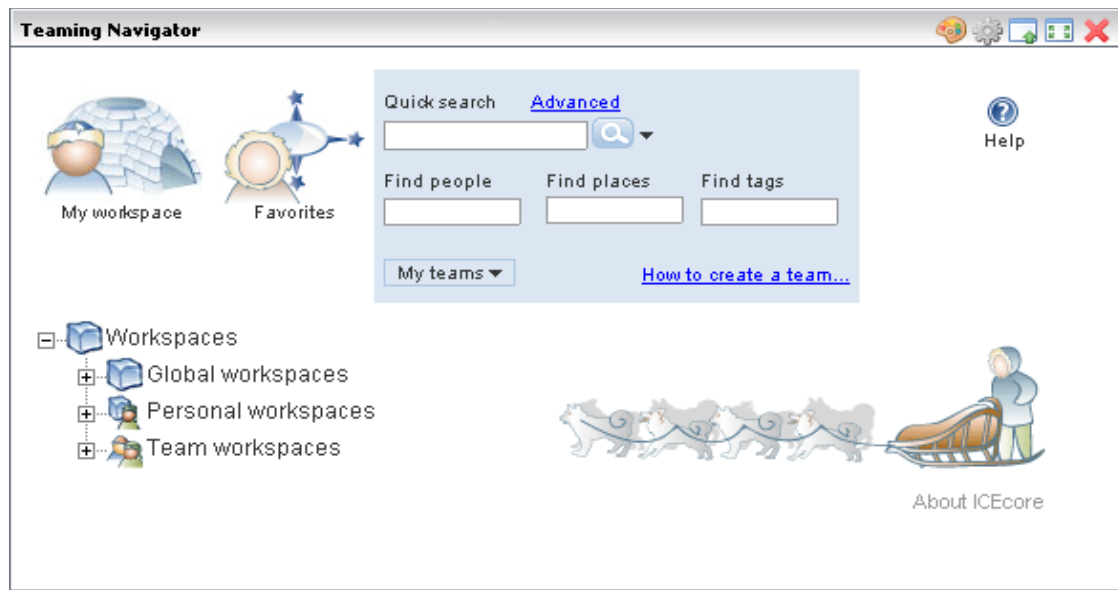
The navigator portlet provides the following tools:

- **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 ICEcore).

- **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 ICEcore installation. Clicking a plus sign (+) expands a portion of the tree, and clicking a minus sign (-) hides that portion of the hierarchy.

Notice the items in the workspace tree. By default, there are four workspaces in the tree. Workspaces are starting places for individuals and teams who want to do a certain type of work. By default, there are four organizational workspaces in the workspace tree: the *Workspaces* page, and 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 ICEcore. 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 a word in the title in the *Find places* text box:

Figure 1-5 *Using Type to Find to View a Folder or Workspace*
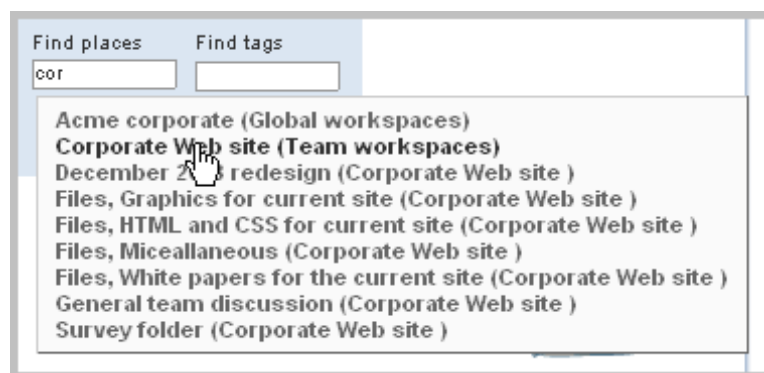
In the previous graphic, after you type the three letters `cor`, ICEcore displays links to all workspaces and folders whose titles include a word that begins with those letters. Then, you can click the linked title of the place you want to visit (for example, *Corporate Web site*).

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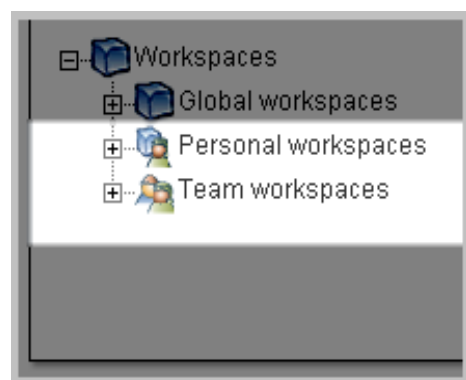
The *Team workspaces* workspace displays a single sub-workspace, whose title is *Corporate Web site*. ICEcore displays links only to those workspaces for which you are a team member.

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

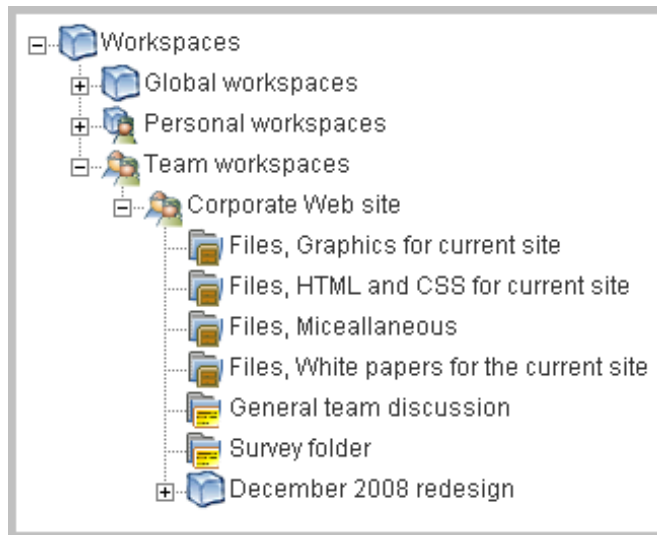*Figure 1-7* *The Folders Contained Within a Team Workspace*

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 72). 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*
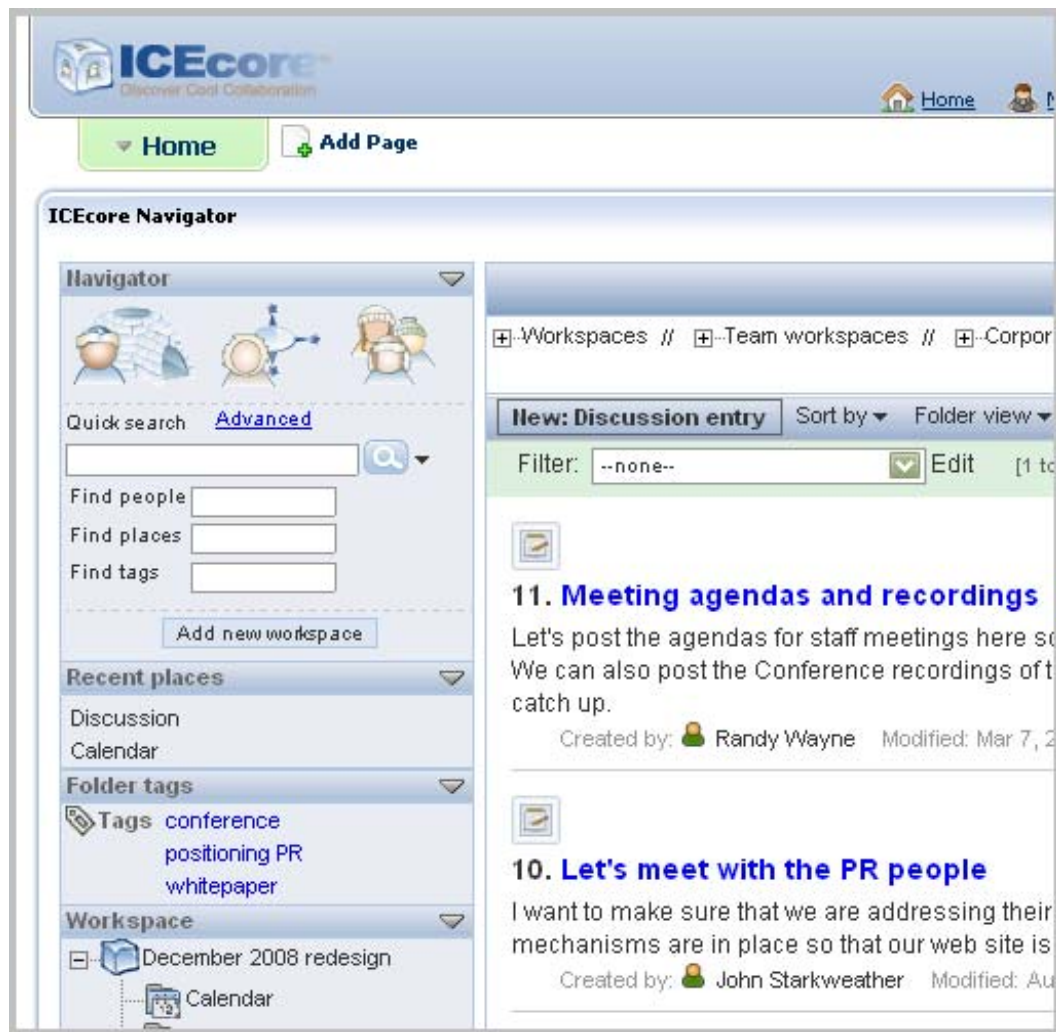
Notice that ICEcore displays most of the navigator-portlet tools in the top left corner of a workspace or folder page:

Figure 1-9 *The Folder Navigation Bar*
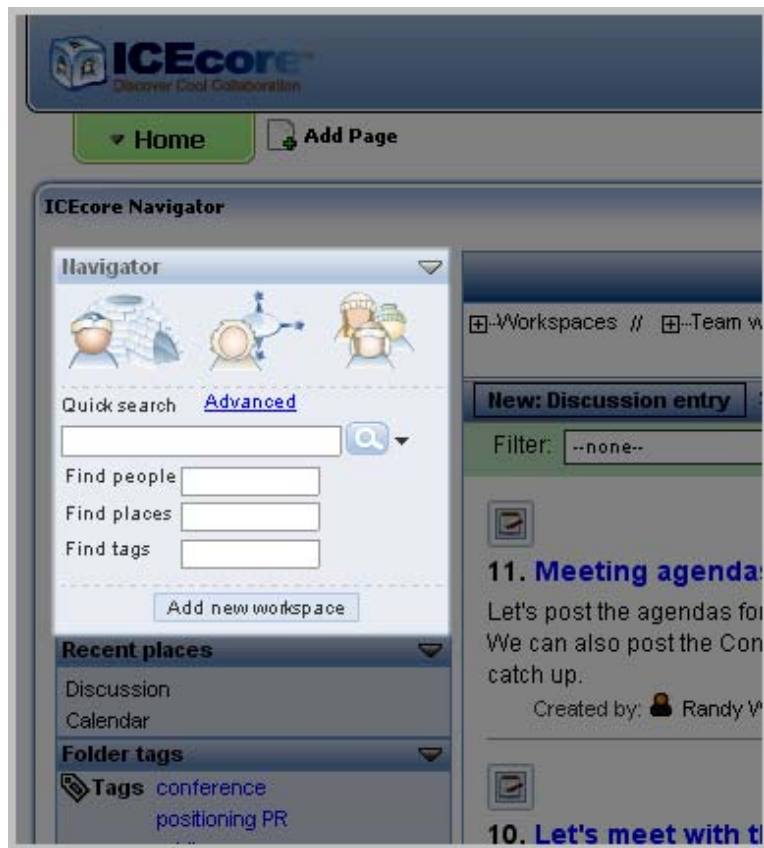
By default, a folder lists only a summary of each discussion entry. To view the entire entry, click its title:

Figure 1-10   *A Linked Entry Title Within a Folder Listing*
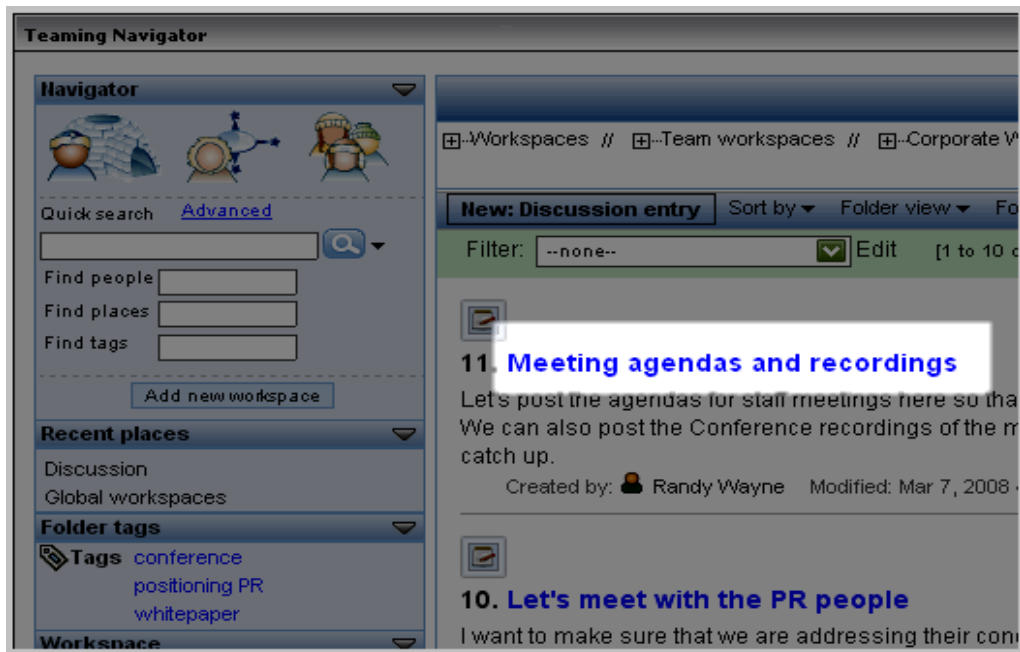
By default, ICEcore displays the discussion entry as an overlay, on top of the current page:

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*
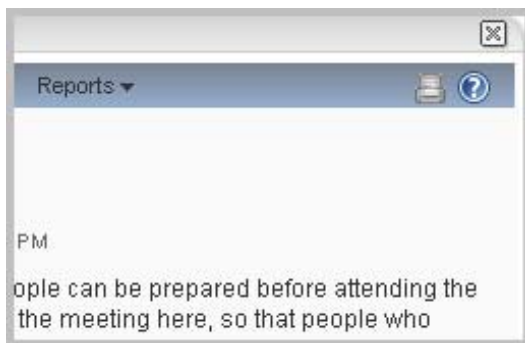
1.3.4 Using More Navigational Tools

ICEcore 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*, ICEcore then displays the "Corporate Web site" team workspace page.

Toward the top of ICEcore 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*
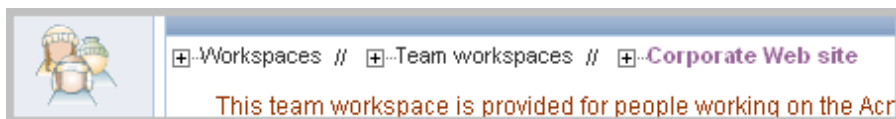
The *Workspaces* workspace contains the *Team workspaces* workspace. The *Team workspaces* page contains the *Corporate Web site* team workspace.

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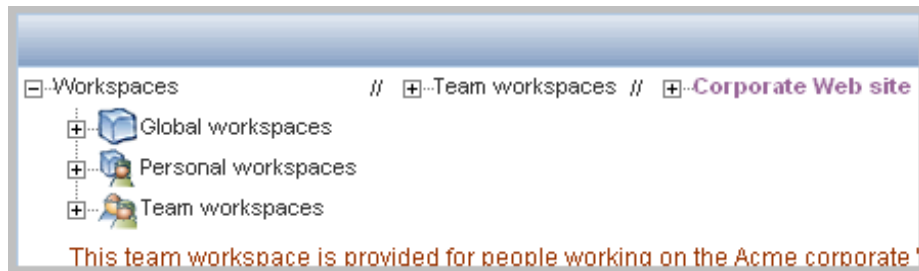
When displaying maximized ICEcore pages, such as a workspace or folder page, ICEcore includes a tools sidebar, which provides additional navigational tools:

Figure 1-18 *The Tools Sidebar*
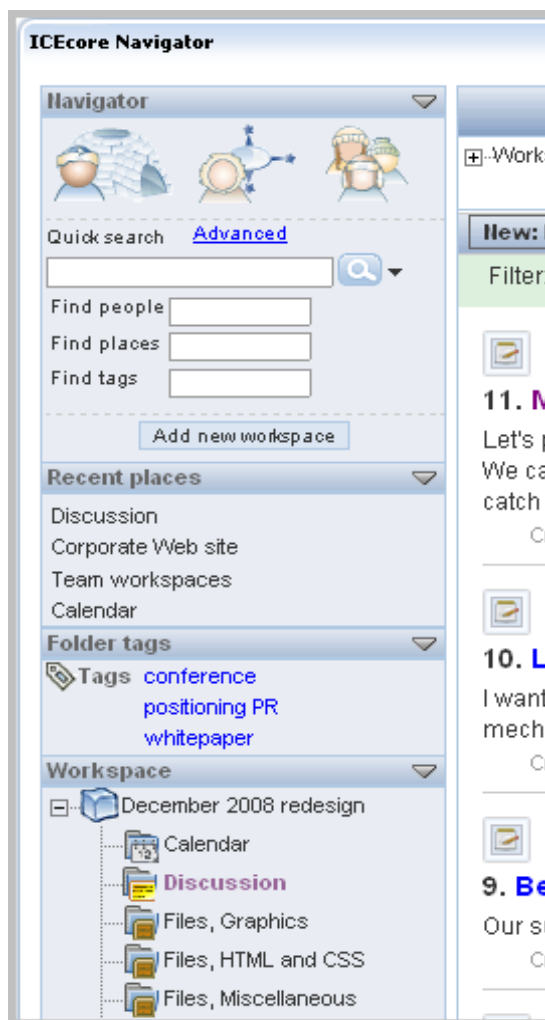
The tools sidebar for a workspace includes these sections:

- ◆ **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*, ICEcore displays that person's personal workspace:

Figure 1-20 *Displaying a Personal Workspace Page*
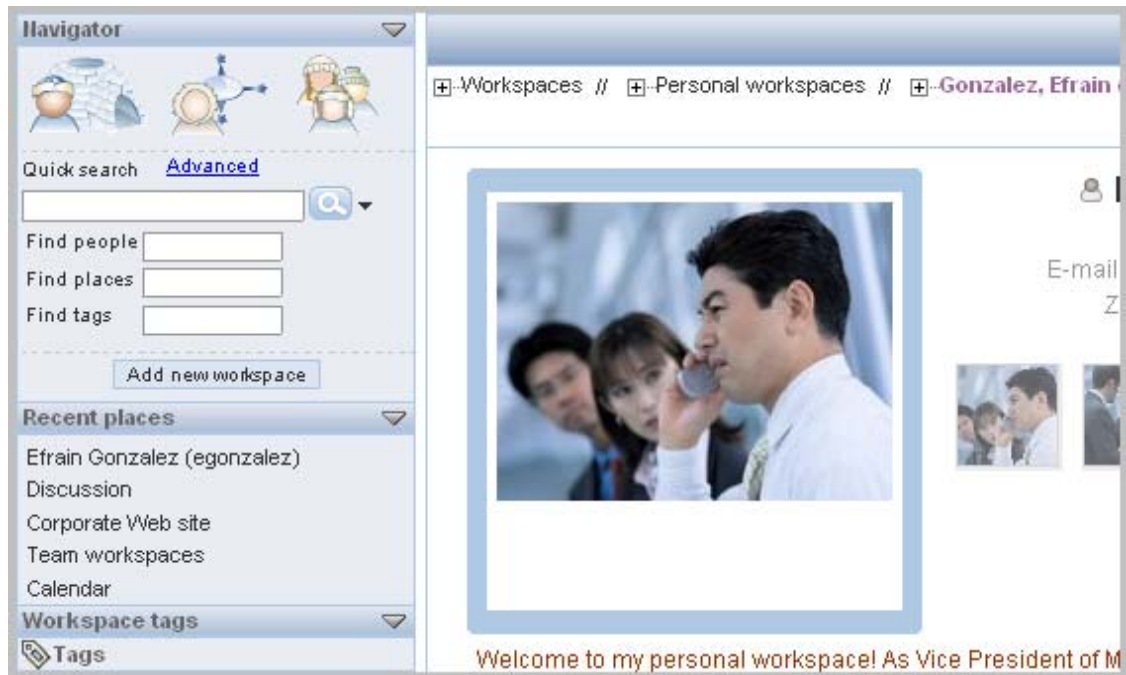
Notice that ICEcore now includes Efrain's personal workspace in the list of *Recent places*, shown on the tools sidebar on the left side of the page.

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*
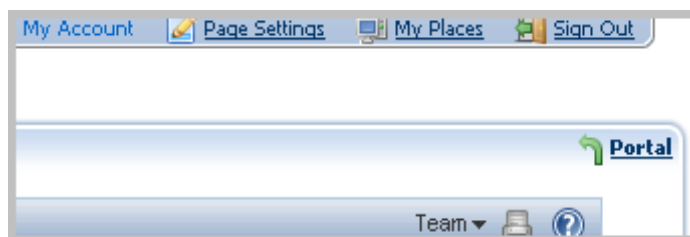
1.4 Using Help Mode

ICEcore 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*

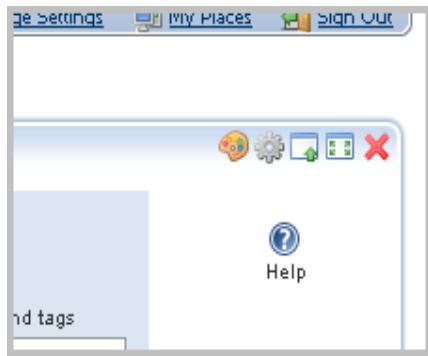When you click this icon, ICEcore enters Help mode. ICEcore dims the page, displays the Help-mode control panel, and presents information icons (*i*) next to each section of that page for which there is Help information:

Figure 1-23 *Information Icons Appearing in Help Mode*
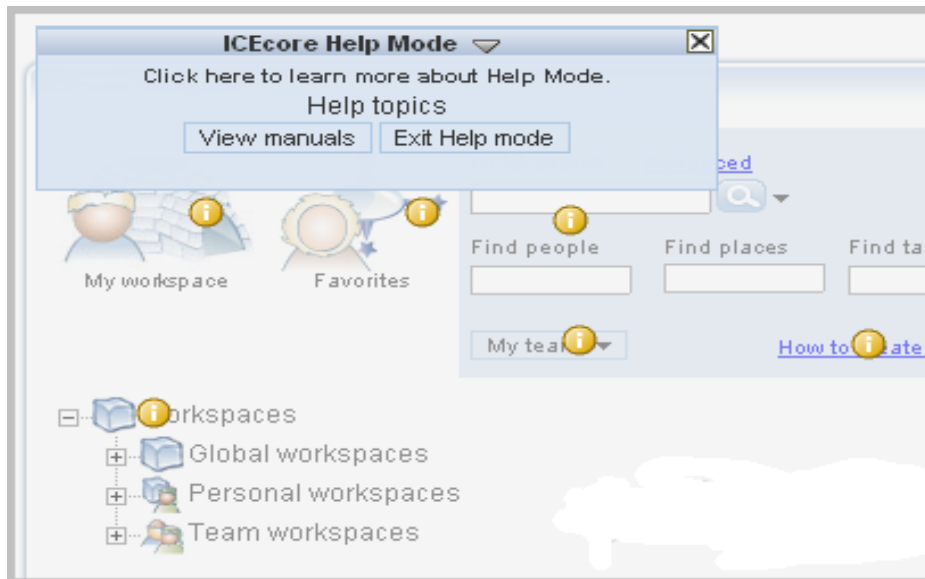
Click the information icon over the portion of the page about which you want more information. When you do, ICEcore displays a panel of information. When you are finished reading the panel, click the *Close* icon (*X*) in the upper right corner of the panel to close it. The following graphic shows a panel of Help information and its *Close* icon:

Figure 1-24 A Help Panel and Its X Icon
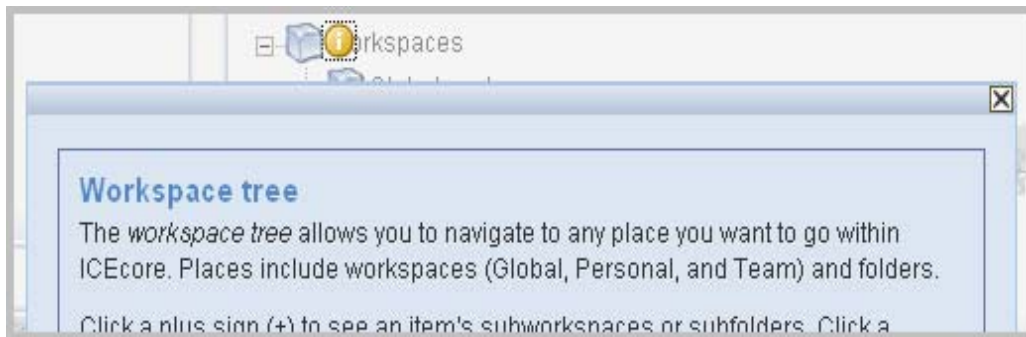
Some Help topics have more than one panel of information. To move to and from pages in a Help topic, you can use the linked panel numbers and arrows, which go to the previous or next panel, at the bottom of the page:

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

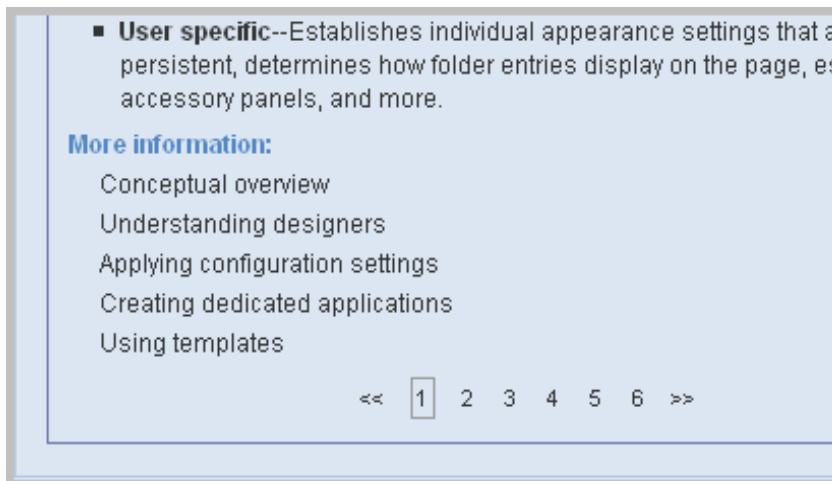The Help topic in the previous graphic has six pages. Either click the number of the page you want to view, or click the double right-arrow to move forward or the double left-arrow to move backward through the topic.

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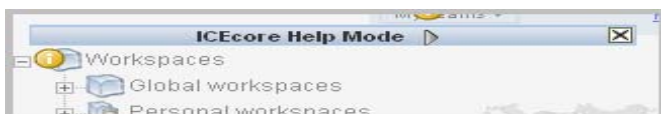
To display the contents of the control panel again, click the *Currently hidden* (right-arrow) icon.

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*
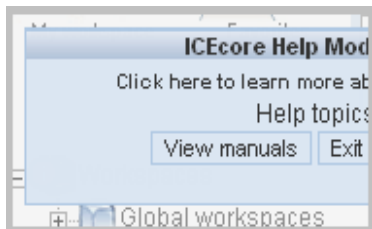
This section has the following subsection:

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*.
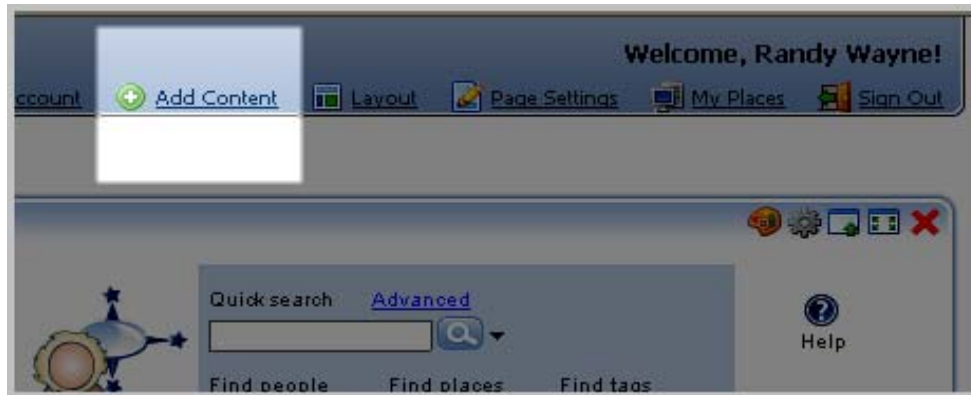
2 Click *ICEcore*.
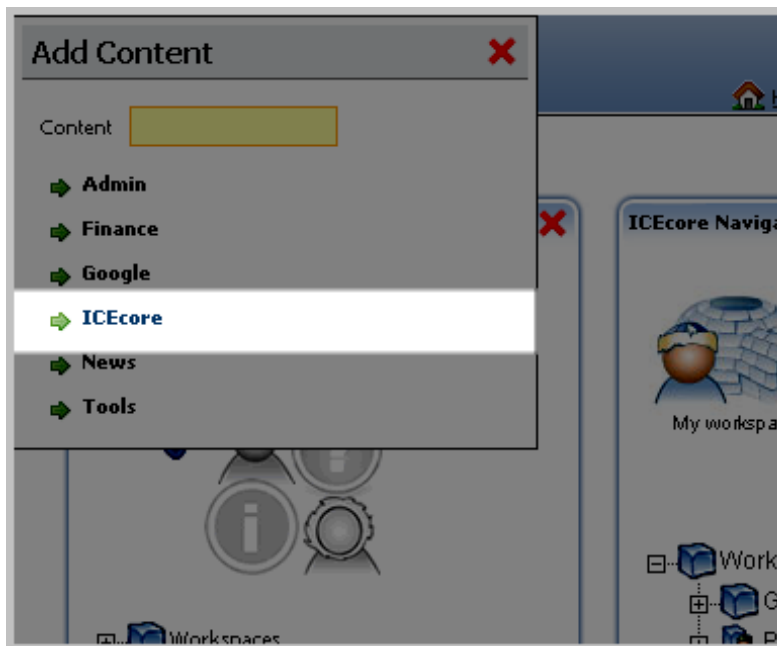
3 Click *Add* next to the *ICEcore Administration* label.

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

The ICEcore 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:

Work with workspace and folder templates (see Help about configuration)

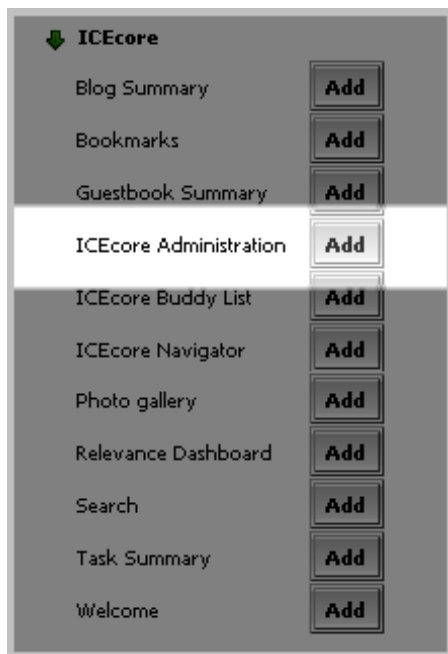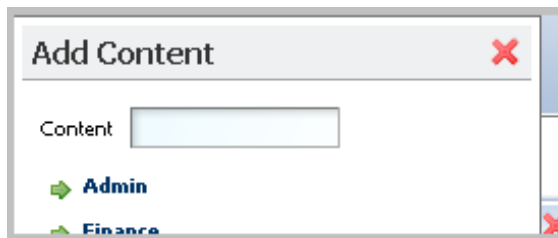ICEcore administration--especially configuration--happens in stages. Balance the need to make your installation minimally functional and the need to wait until user participation directs the optimal use of ICEcore for your organization. Use the links at the end of this Help panel to review brief overviews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

ICEcore Installation and Configuration Guide (appears in a new window or tab)

Getting Started

2

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

This topic includes the following sections:

2.1 Setting Up Your Buddy List

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

NOTE: Your presence icon requires that you run the ICEcore Conference 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 ICEcore 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 *ICEcore Buddy List* portlet (unlike this picture, your portlet probably contains no names yet other than your own):
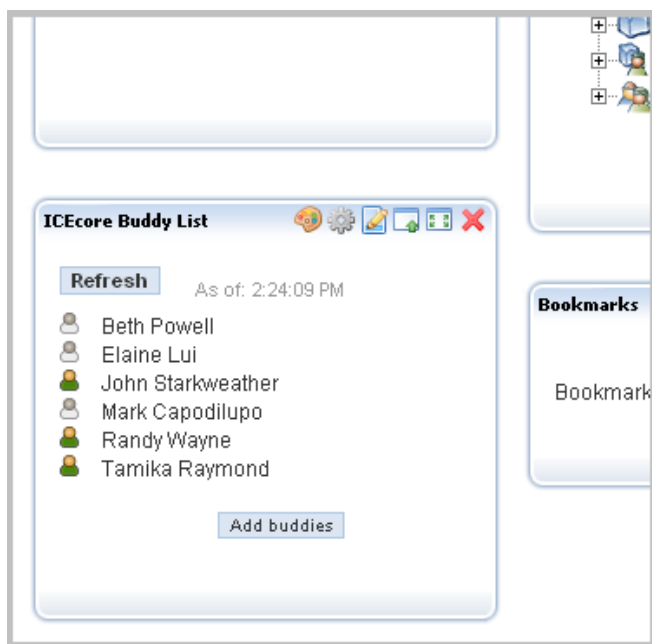
If you do not see the portlet, click *Add Content* in the upper right corner of the portal page, click ICEcore, click the *Add* button next to the label *ICEcore Buddy List*, and click the *Close* icon (*X*). ICEcore adds the buddy-list portlet to the portal page. If you require more assistance, see your ICEcore site administrator.

3 In the portlet, click *Add buddies*.

ICEcore 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.

ICEcore 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. ICEcore then displays a list of links to all possible items:
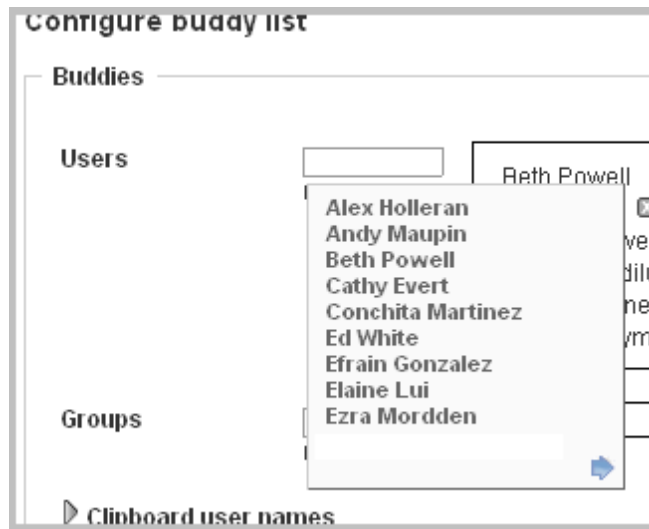
Notice the blue arrow in the bottom-right corner of the names panel. You can view next and previous panels of choices using the blue-arrow icons.

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

ICEcore 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 ICEcore, you can create a comfortable working space in your personal workspace.

Your personal workspace is your ICEcore 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 ICEcore.

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:

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:
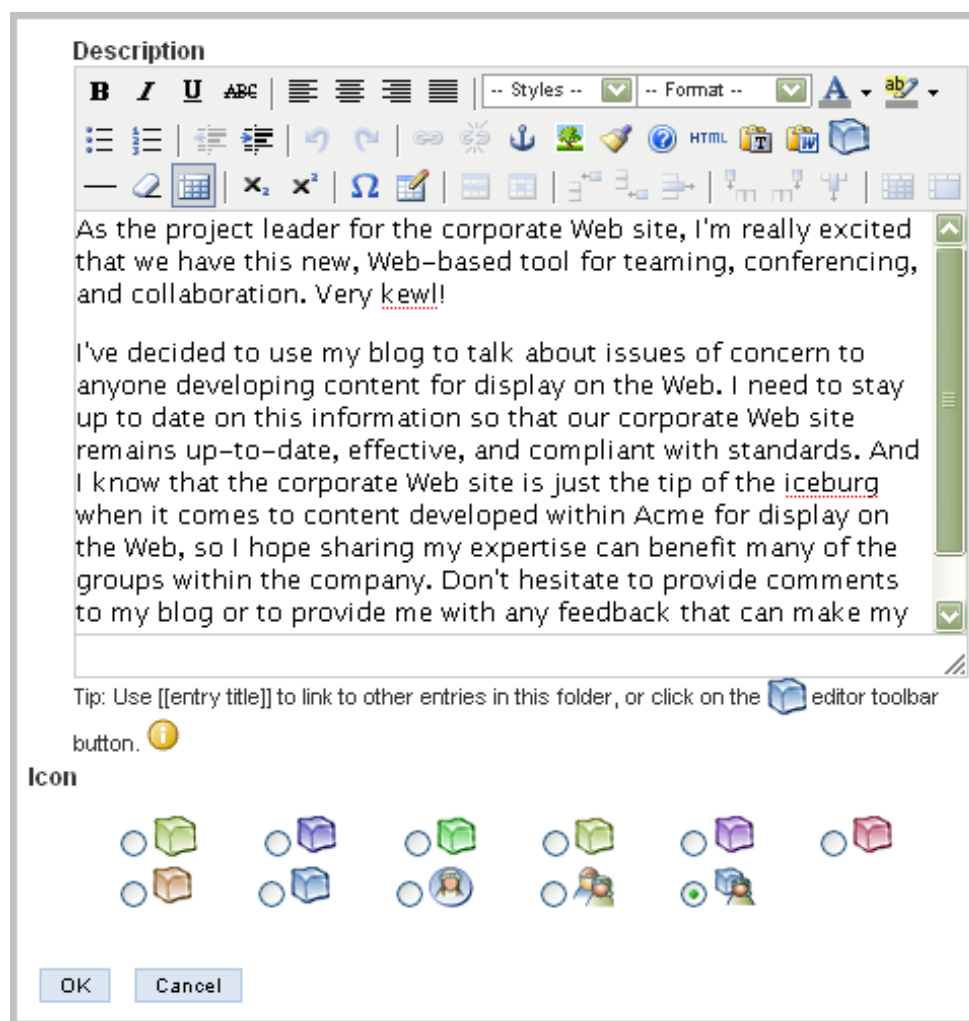
1 On the portal page, click *My workspace* in the navigator portlet:
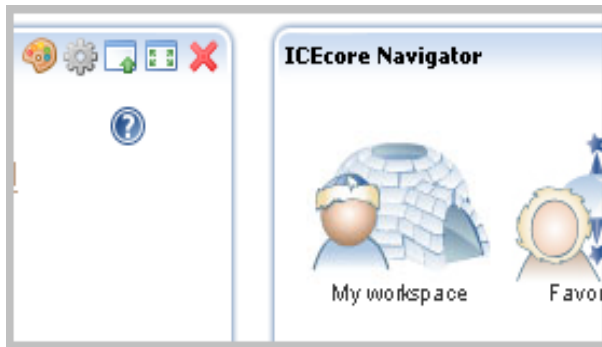
2 Click *Manage > Modify this workspace*, located toward the upper right corner of the page:
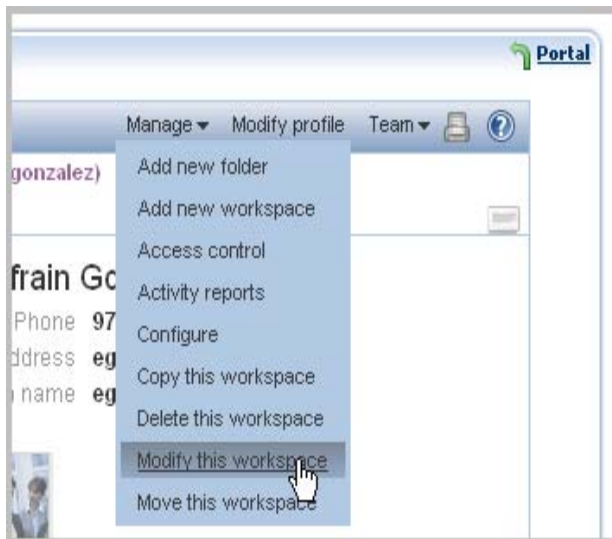
ICEcore displays a form that allows you to add a personal description to your workspace:

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*.

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

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.

Accessory Panel ▾ ▽

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 ICEcore 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 ICEcore Conference 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*:

ICEcore 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:

ICEcore 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:

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 ICEcore removes it after you submit the form.

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

ICEcore displays the first picture in your list as the main picture in your personal workspace, and displays all other pictures as thumbnails (smaller versions) 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 ICEcore displays each picture in the larger frame to the left of the contact information.

- Click any of the pictures in the personal workspace, and ICEcore 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*:
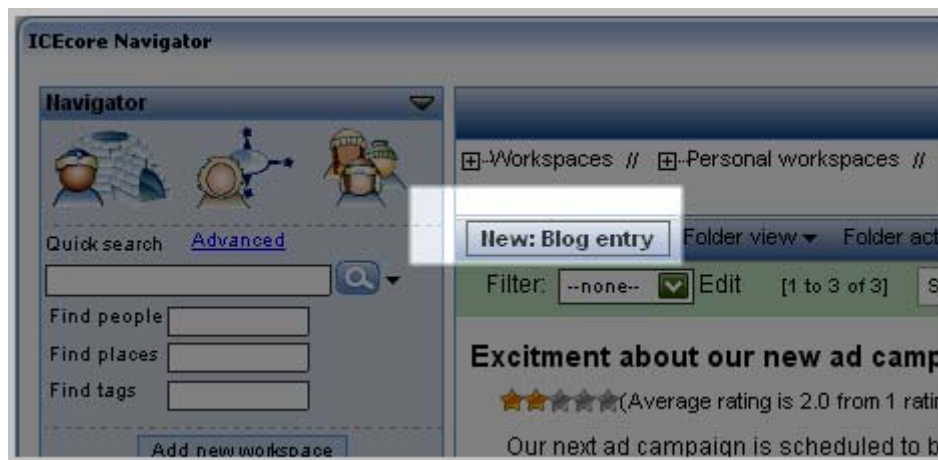
ICEcore displays a form.

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*
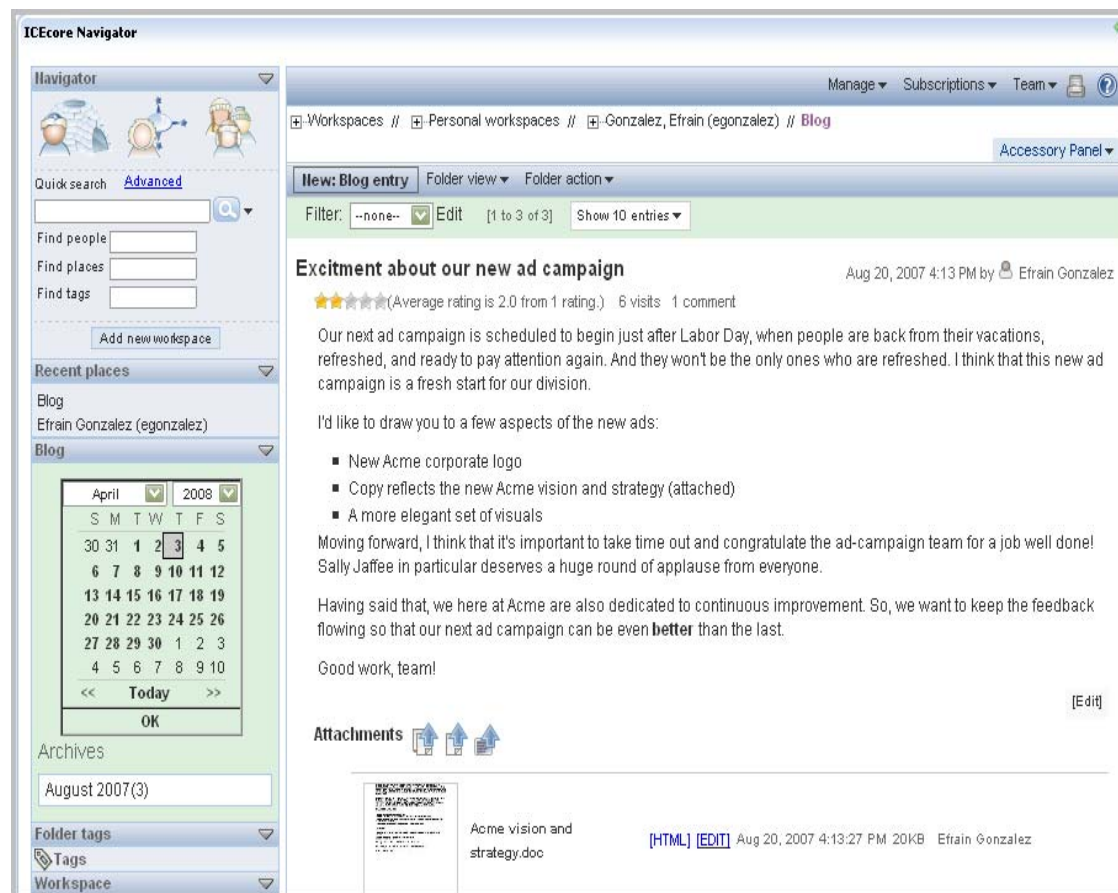
This is the content of the entry:

Figure 2-4 *Content of the Completed Blog Entry*

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 ICEcore.

This section contains the following subsections:

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):
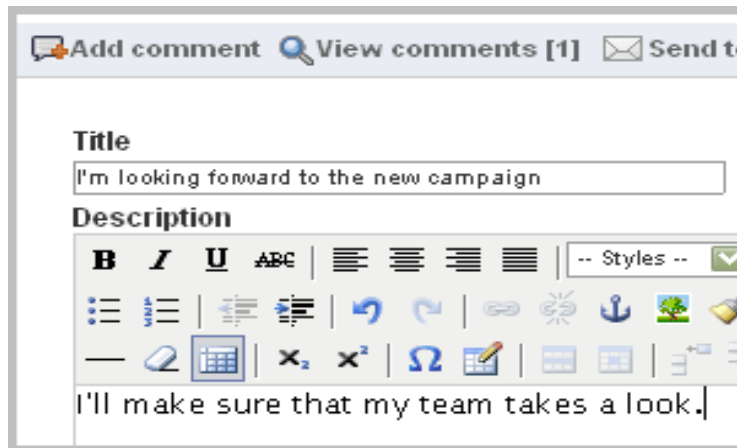
4 At the bottom of a blog entry, click the *Add comment* link:
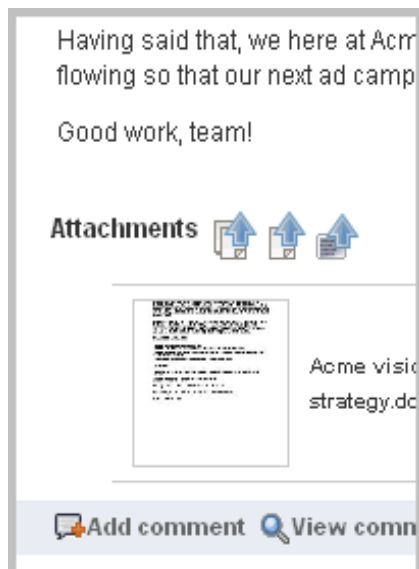
ICEcore displays a form just below the *Add comment* link.

5 Provide text for your comment:

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

ICEcore adds your comment to the blog entry:

Figure 2-7 *A Comment Added to a Blog Entry*
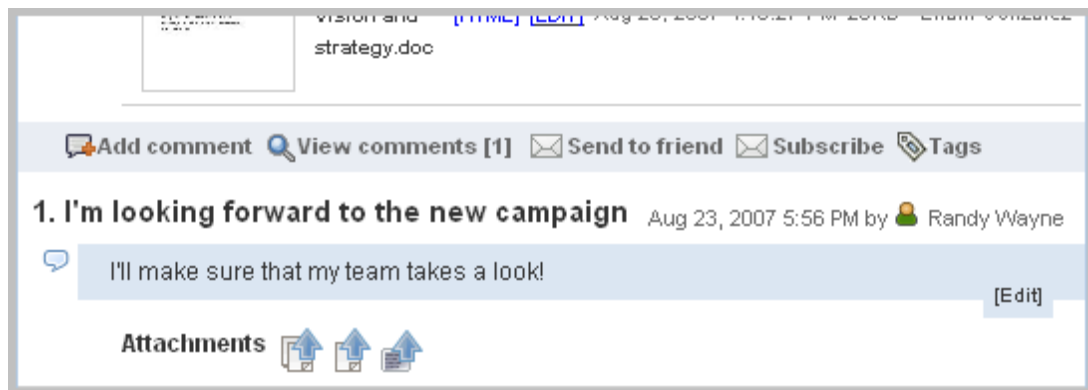
Collaborating in a Folder

You can use your personal workspace to learn ICEcore 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 47.)

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:
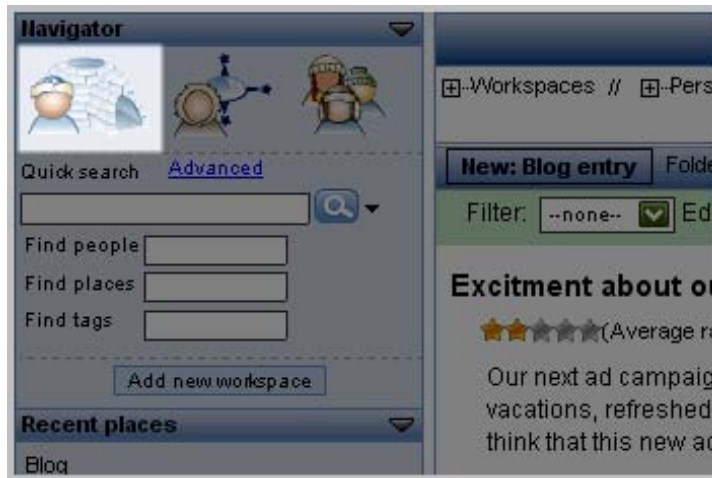
2 Click *Manage > Add new folder*:
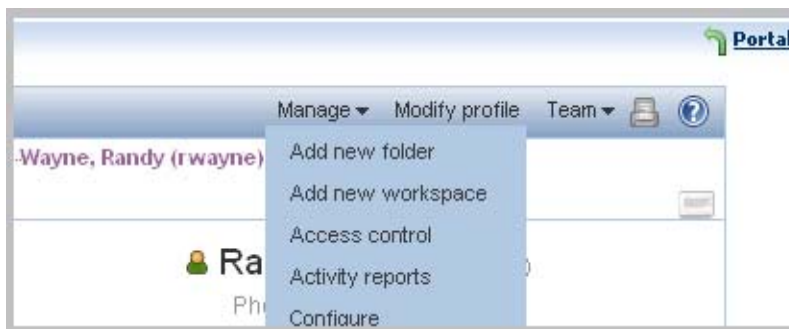
ICEcore displays a form that allows you to create a new folder.

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:
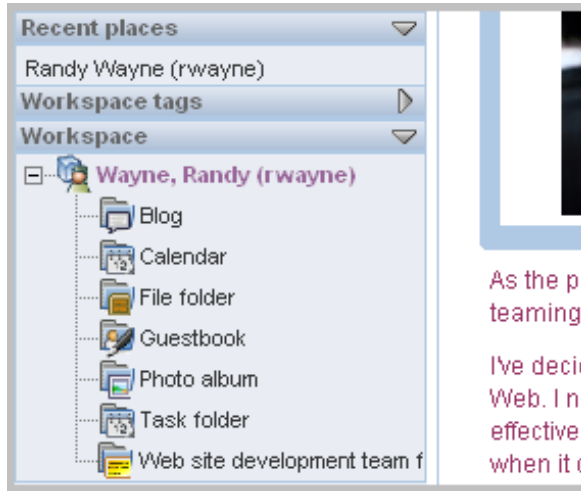
5 Click the link for your newly created folder.

6 (Optional) Add new entries.

7 In the management menu bar, click *Team > Add or delete team members*:
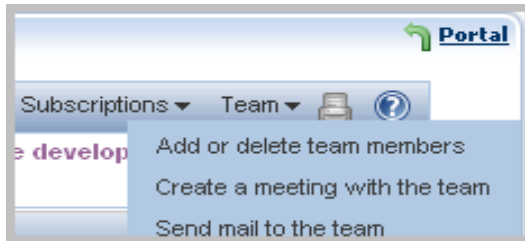
ICEcore displays a form telling you that the folder is not inheriting team settings and provides you with tools for specifying your teammates. Inheritance is helpful, because it makes many product features work automatically; if you want this folder for private use, then applying inheritance would be 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:
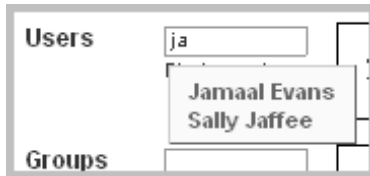
Repeat this step as often as you need to add all of your teammates.

9 Click *OK*.

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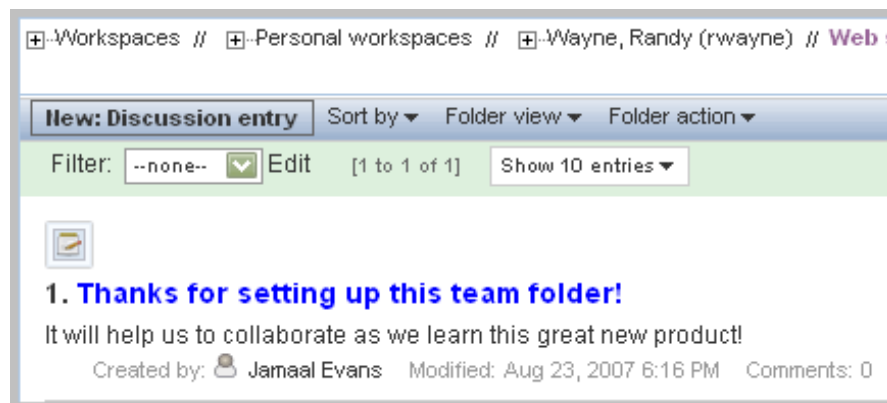
You can use team-oriented folders in your personal workspace until you feel more comfortable with the product features. Then, you can create a team workspace.

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 47
- Section 2.3.2, "Viewing Team Members," on page 48
- Section 2.3.3, "Communicating with Teammates," on page 49
- Section 2.3.4, "Allowing Visitors to Your Team Workspace," on page 49

2.3.1 Create the Workspace

To create a team workspace:

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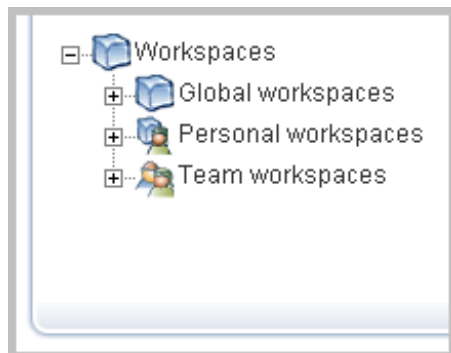
By default, all team workspaces are contained within *Team workspaces*. Your site administrator might instruct you to go to a different workspace to create your team workspace. If so, the remaining steps in the process are the same.

2 Click the *Add a team workspace* button, located just under the workspace tree toward the top of the page:
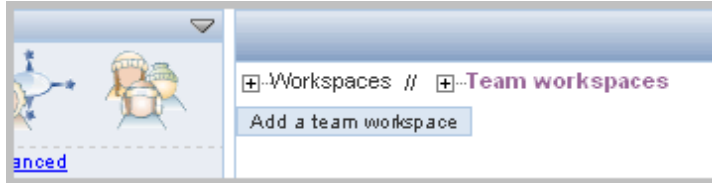
ICEcore displays a form used to create your team workspace.

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 ICEcore 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. ICEcore 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, ICEcore 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*
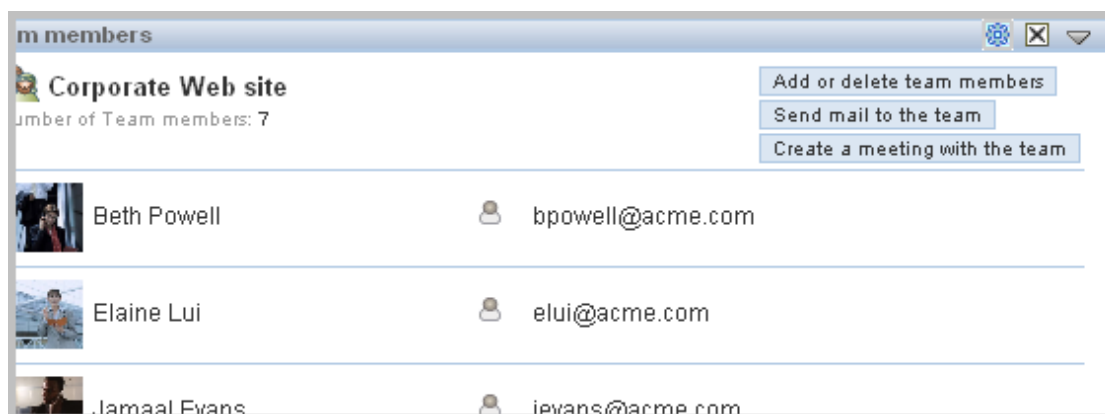
If this accessory is not present, do the following to view the team membership:

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 ICEcore Conference 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*:
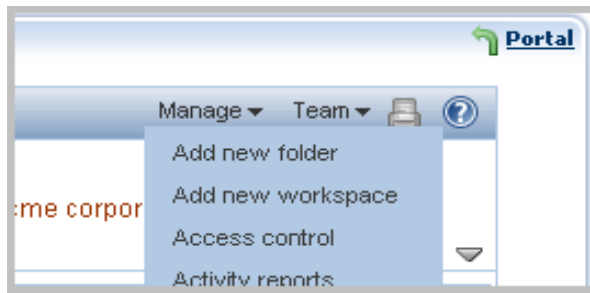
ICEcore displays the *Configure access control* form for the team workspace.

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

5 Click *Add a role > Visitor*:
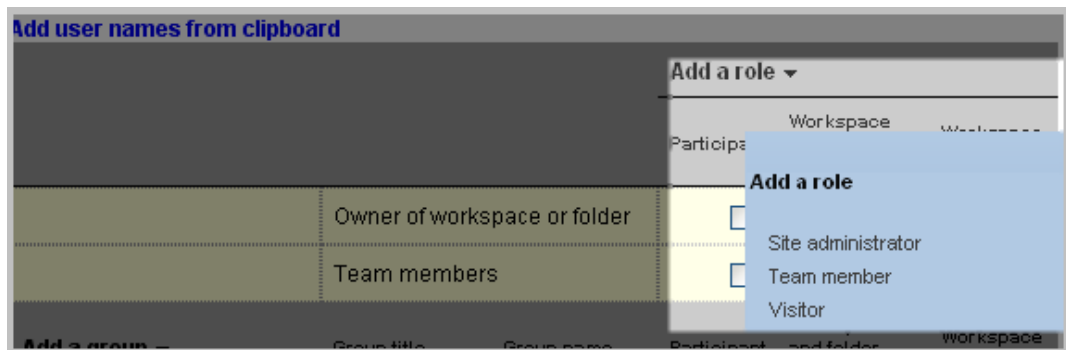
6 Toward the bottom-left portion of the form, click *Add a user*, and use the type-to-find feature to select a name:
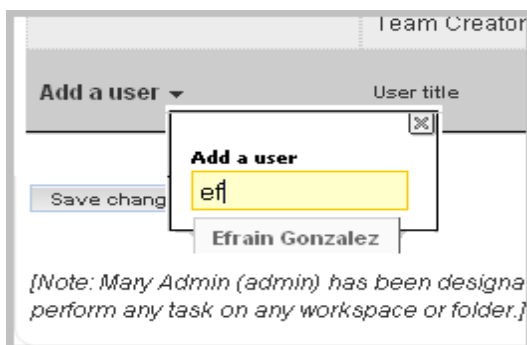
7 In that new user's row, select the check box in the *Visitor* column:

Add a user ▾		User title	User name	Participant	Visitor	Workspace : folder admin
		Efrain Gonzalez	egonzalez	☐	☑	

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, ICEcore 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:
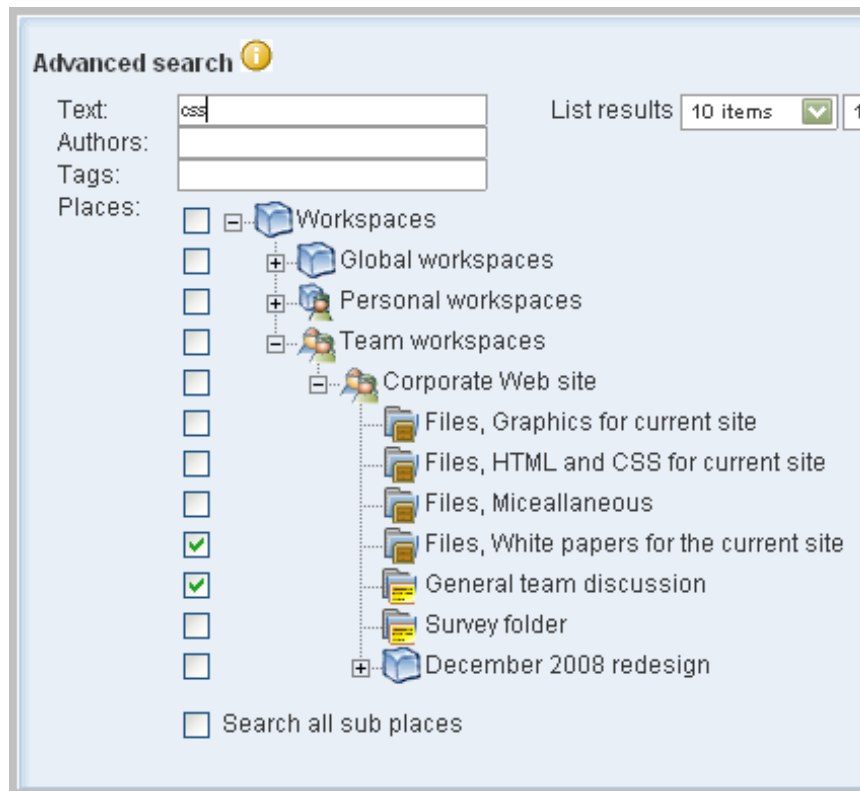
3 Click *Search*.

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 ICEcore, 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*
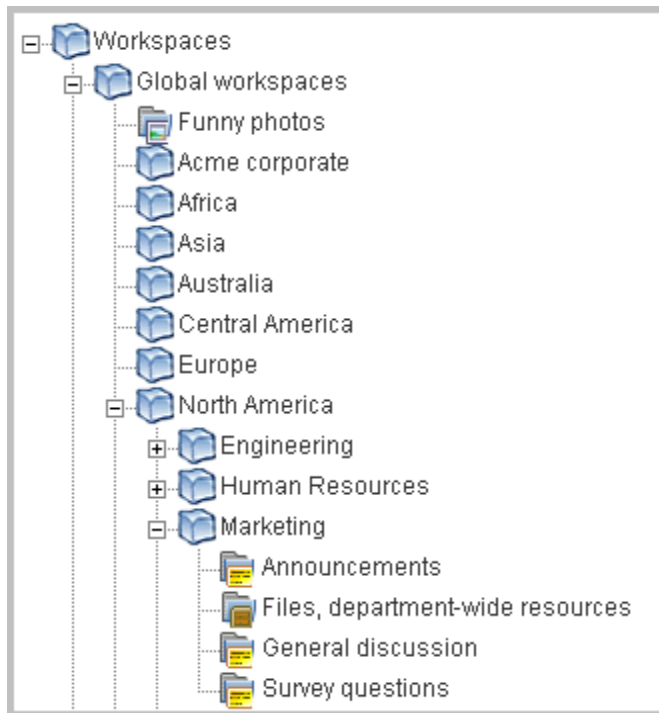
Features Overview

3

This topic provides a brief overview of most of the ICEcore tools, folder types (or "applications"), and workspaces.

This topic includes the following sections:

3.1 Tools

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

This section contains these subsections:

3.1.1 Accessories

Accessories are subsections of a workspace or folder page that enhance the use of ICEcore 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

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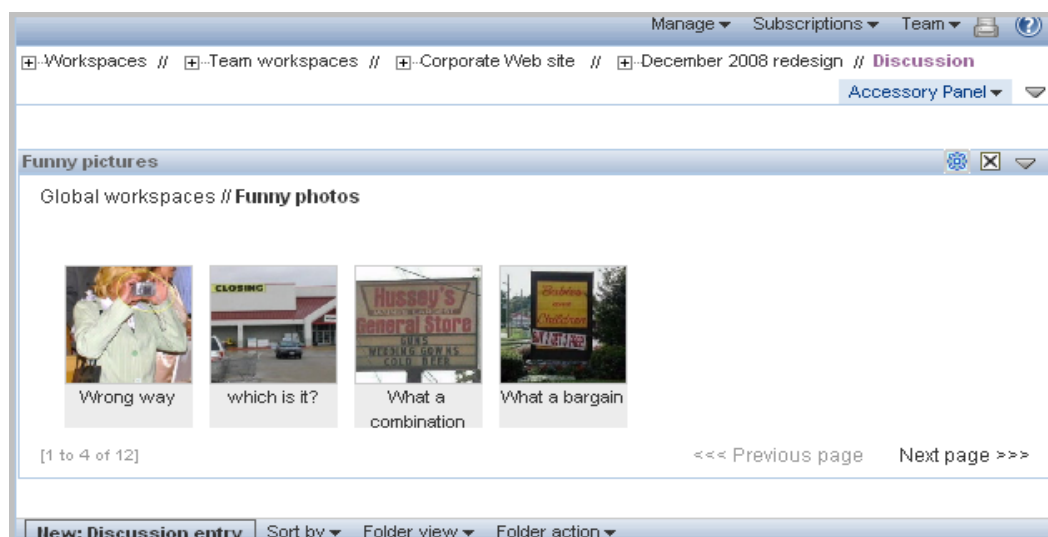
To close an accessory or the entire accessories panel, click the appropriate *Currently displayed* (down-arrow) icon:

Figure 3-3   *Currently Displayed Icons for an Accessory and Its Panel*
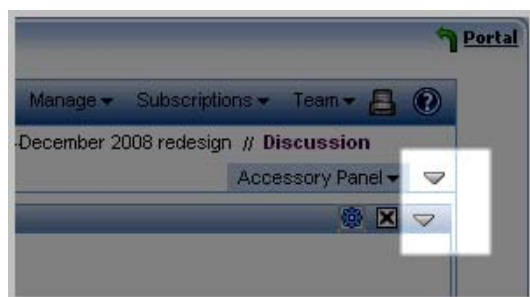
To delete an accessory, click the *Delete* icon (*X*). Remember that accessories do not contain information; they merely point to and summarize information that exists elsewhere. When you delete an accessory, you delete the pointer, not the source information. It is very easy to add the accessory again, 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 ICEcore. 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*
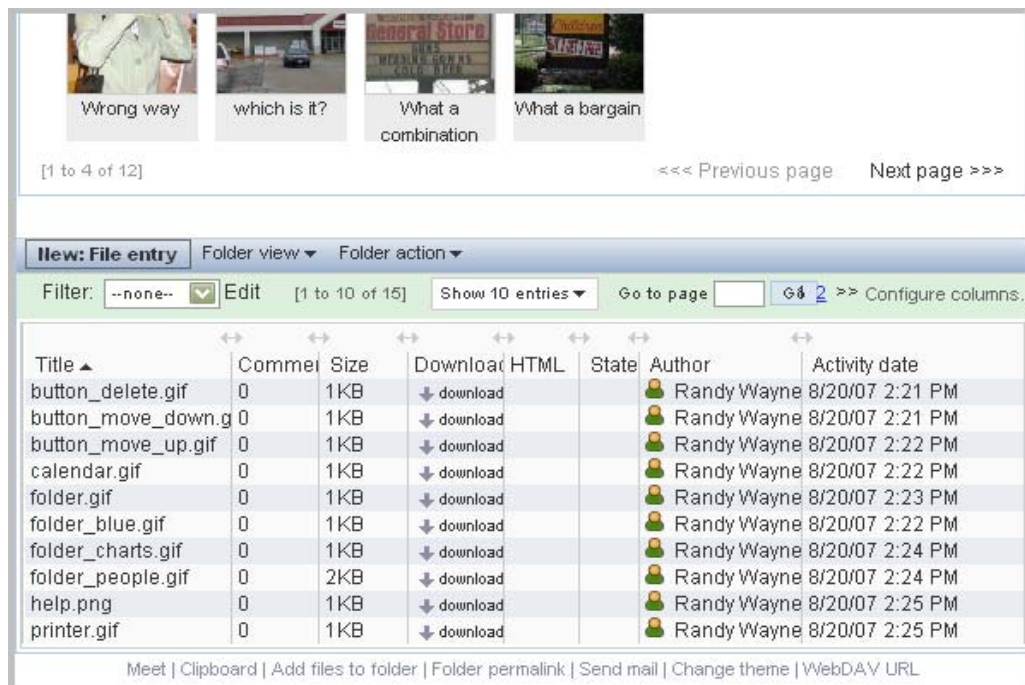
And it appears when he views the discussion folder for the Web site redesign effort:

Figure 3-5 *A Global Accessory Seen on a Discussion Folder Page*
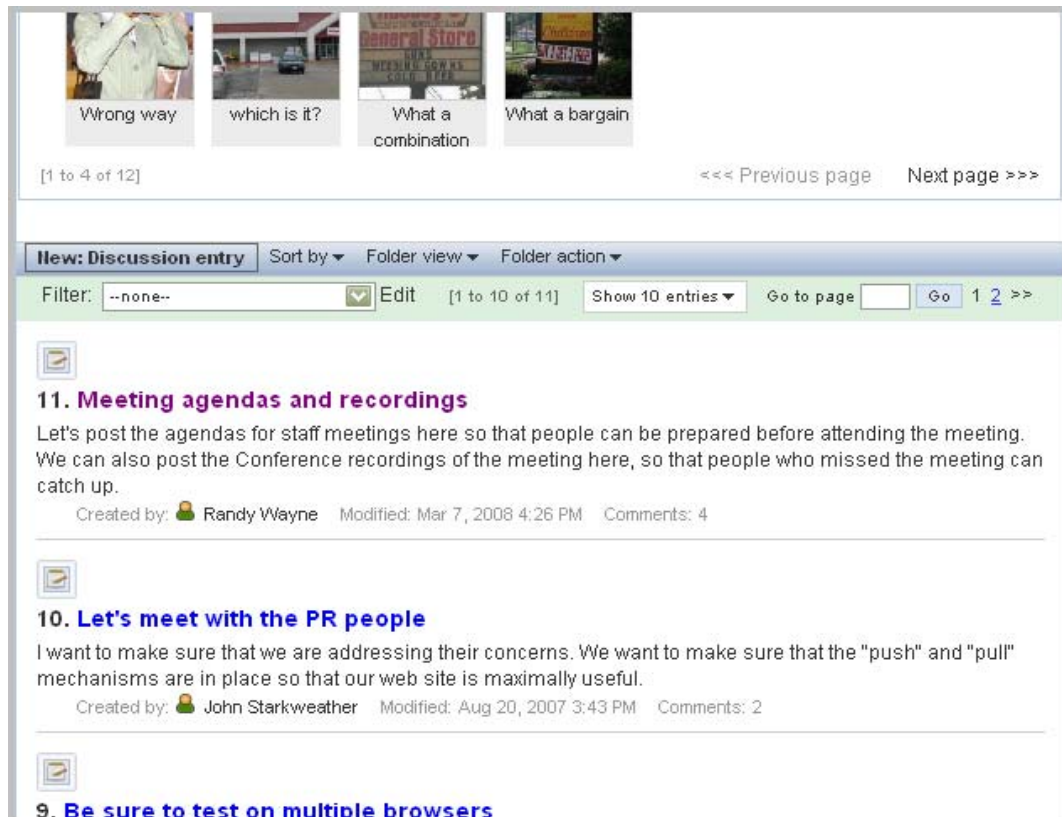
To save room for viewing the content of the folder, Randy can close either just the photo-gallery accessory or the entire accessory panel. This close setting is "sticky"; it remains in effect for every page that this person views:

Figure 3-6 *A Closed Accessory*
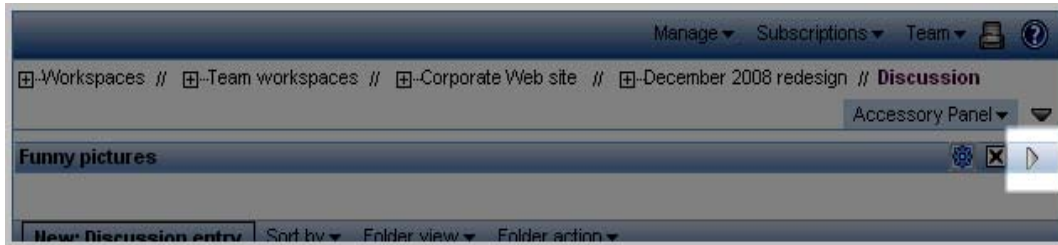
Adding an Accessory for One Page

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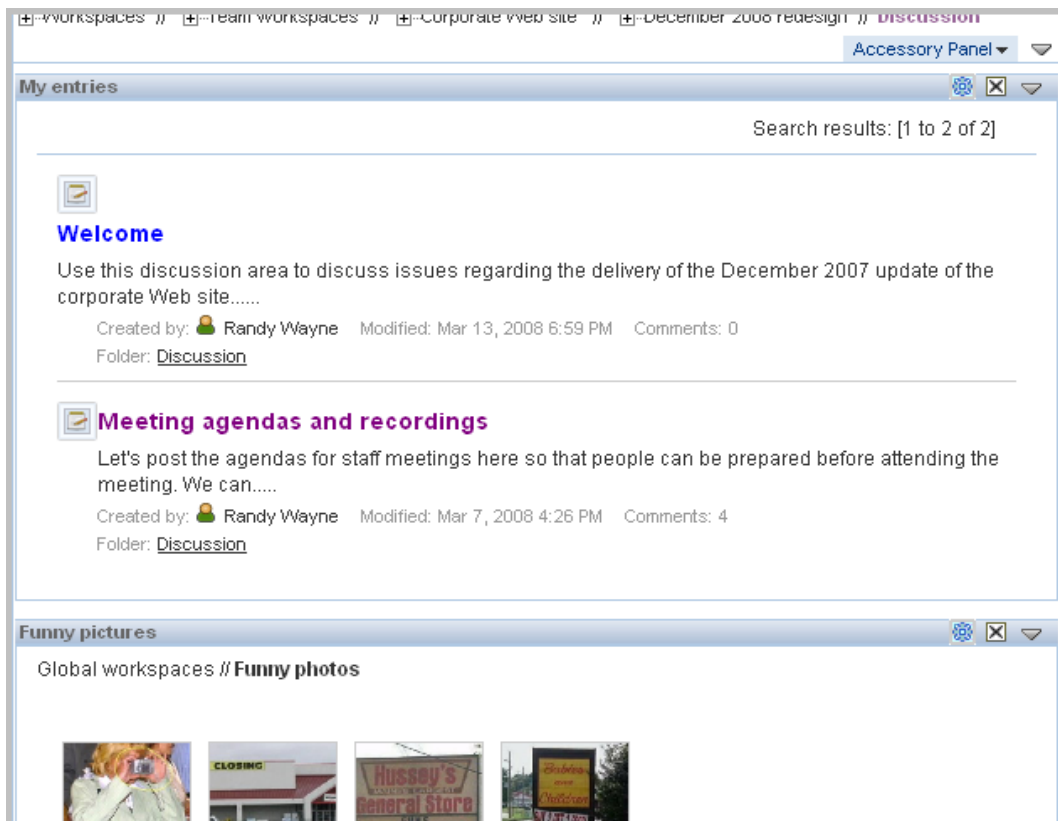
Randy can close the search-results accessory (or the entire accessories panel) to see the folder contents displayed closer to the top of the page. Finally, suppose that Randy wants to fine-tune the search criteria. To reconfigure an accessory, click the *Configure* icon:

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

Positioning Accessories

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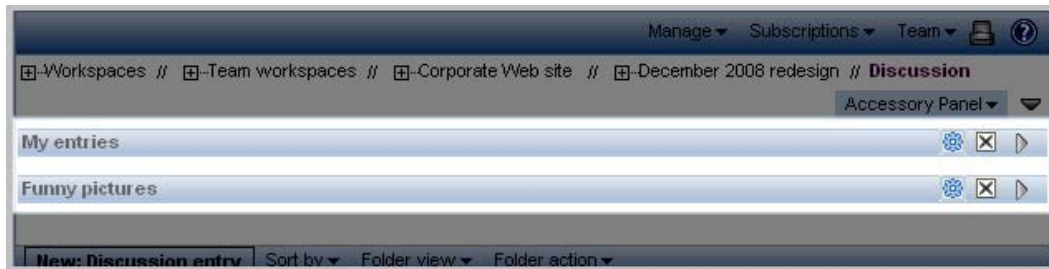
To move the *My entries* accessory below the *Funny pictures* accessory, click and hold the *My entries* title bar and drag it below the other accessory until you see a full-width, bright line indicating the new position (portals other than Liferay may display differently):

Figure 3-10 *Positioning an Accessory*
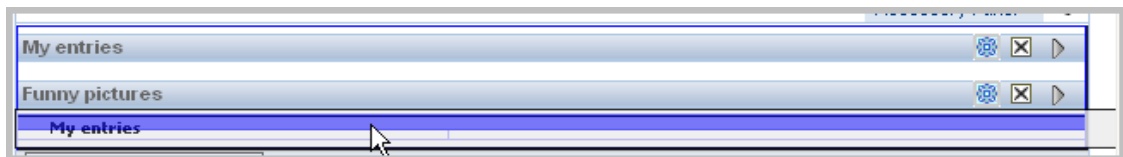
Drop the accessory in place by releasing the mouse button, and the accessory appears in its new position:

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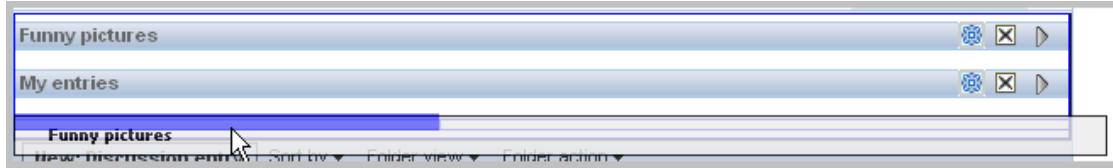
Drop the accessory into place by releasing the mouse button. Click and drag the second accessory so that a bright line appears in the next column:

Figure 3-13 Positioning an Accessory in the Other Column
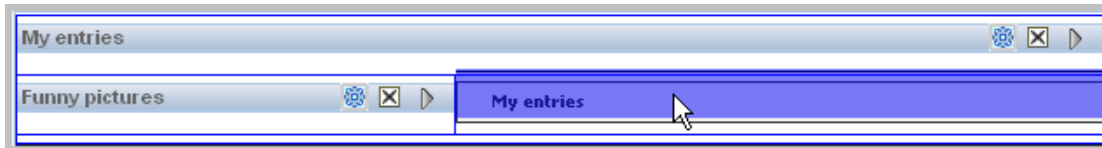
After you open the two accessories, they now appear side-by-side:

Figure 3-14 Accessories Appearing in Two Columns
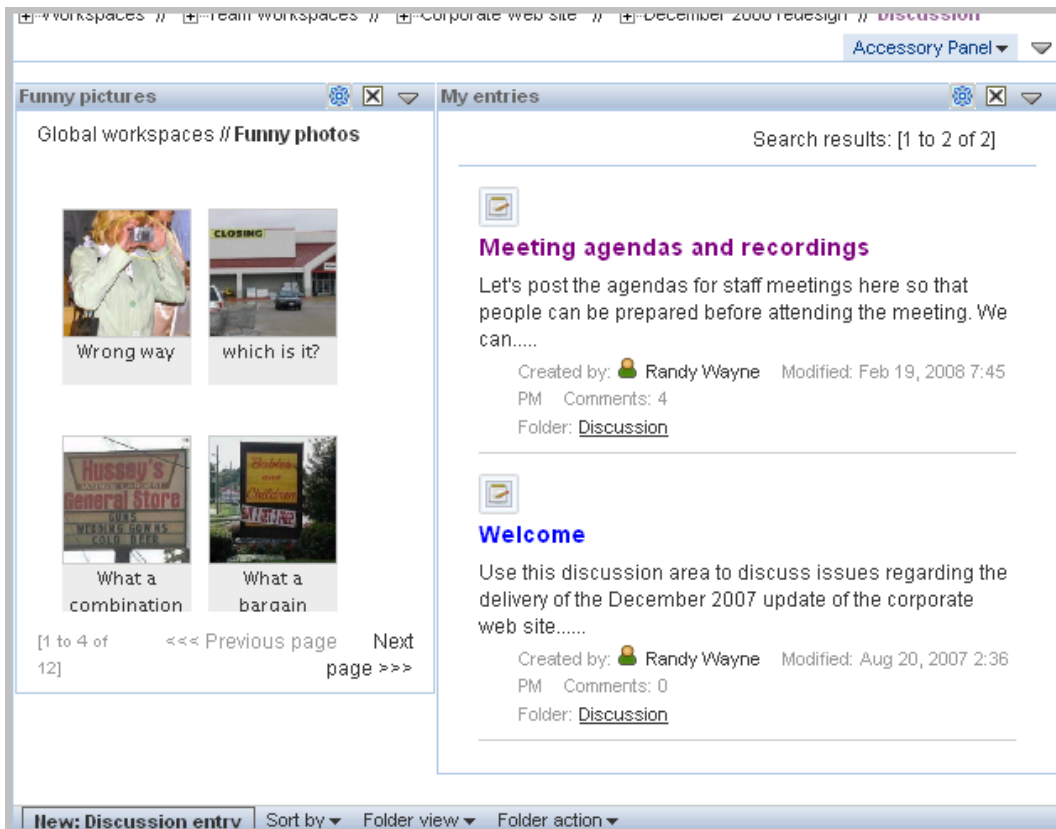
Establishing a Default Layout

When you create accessories for every page that you view or for a community-accessories panel, ICEcore 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 60.)

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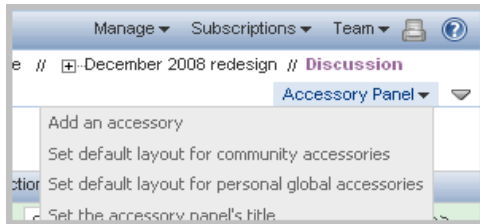
ICEcore displays the accessories in the reverse order in which they were created. Click the title bar of an accessory, drag it, and drop it into the position you want it to have. Repeat this action until the accessories are in the order that you want, and close the form.

Creating a "What's New?" Accessory

Accessories have applications whose functions can expand beyond the default list of ICEcore 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, ICEcore 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*.

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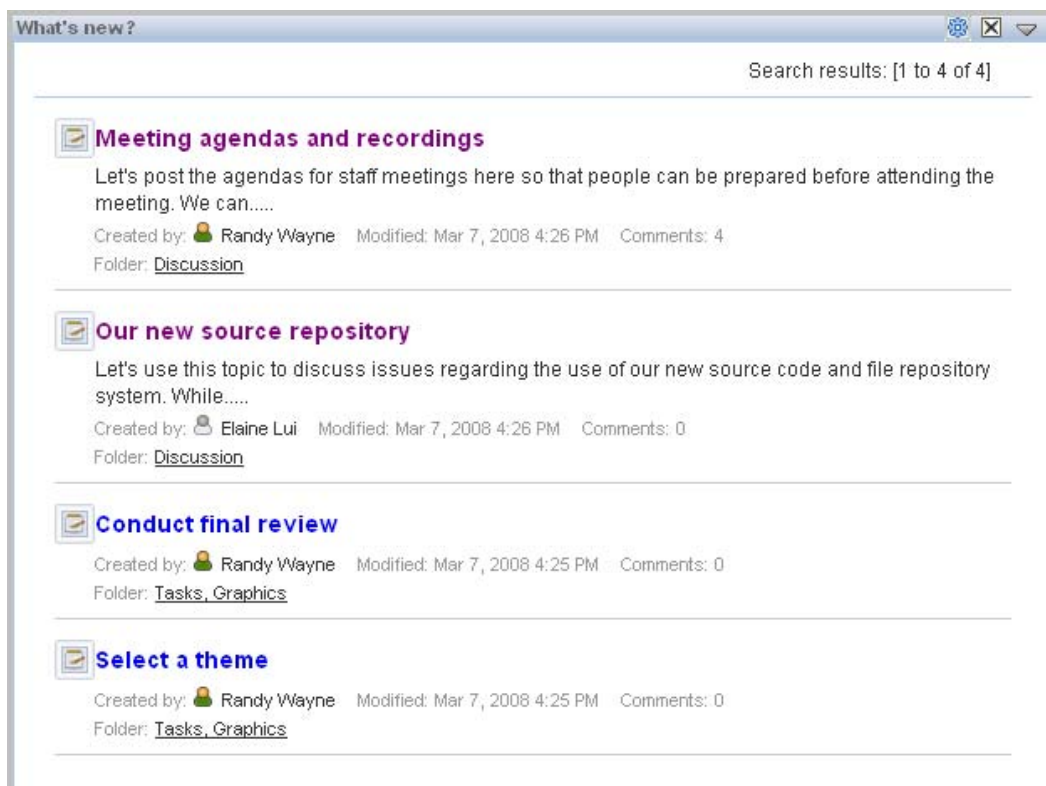
In an installation containing a large amount of information, you might want to track new activity in specific workspaces and folders. In this case, when you define the Search Results accessory, use the workspace tree to limit the search to specific places.

Also, in keeping with the ICEcore 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 ICEcore, 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 ICEcore 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*
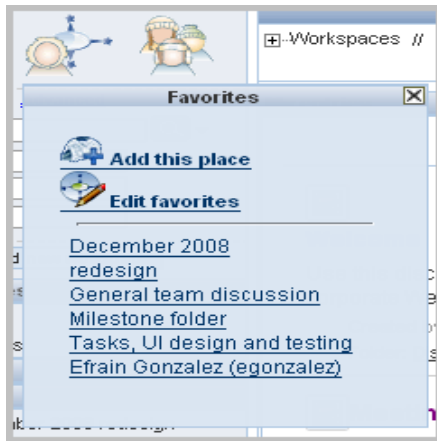
3.1.3 Tags

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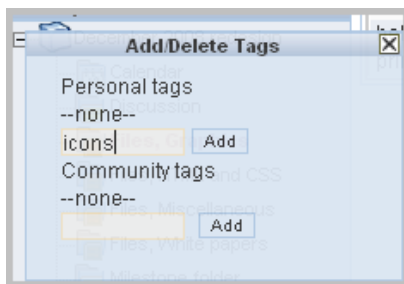
When you are finished adding all the tags you want, click the *Close* icon (*X*) in the upper-right corner of the panel.

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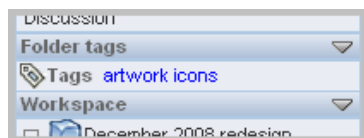
Both of the tag names (*artwork* and *icons*) are links. Click a tag name, and ICEcore searches for all items that have that tag applied to them and displays a search results page. Use your browser's *Back* function to return to the folder.

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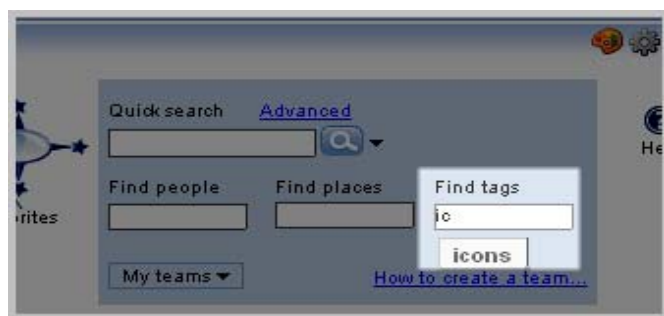
To remove a tag from an item, view the item, click the *Tags* link and icon, and click the *Delete* icon (*X*) next to the tag name.

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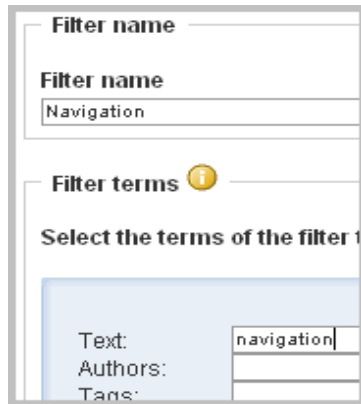
Filters allow you to see only the subset of folder entries that most interest you. To create a filter, view a folder, and click the *Edit* link next to the *Filter* drop-down list:

Figure 3-22 *Creating a New Filter*
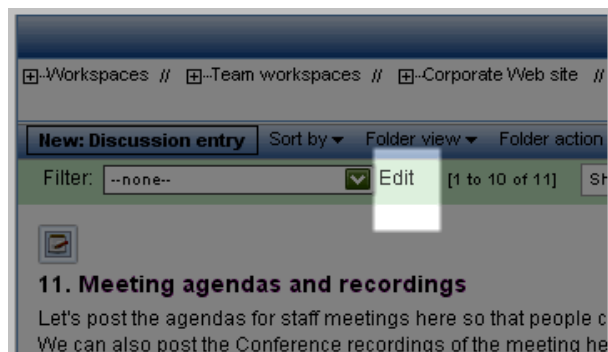
For example, someone can create a *Navigation* filter that displays all of the Web site redesign entries in the discussion folder that contain the word `navigation`:

Figure 3-23 *Search Criteria for the Filter*

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

Figure 3-24 *Applying the Filter*

3.1.5 E-mail Notifications

ICEcore 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, ICEcore 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*
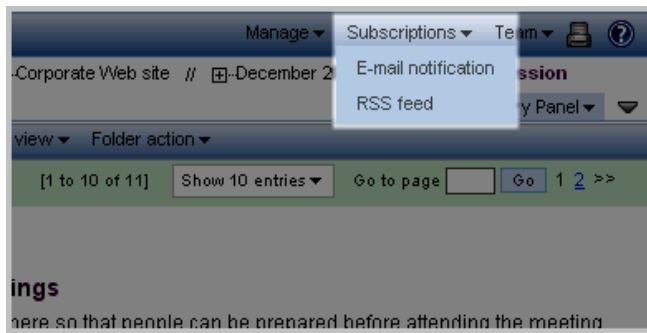
ICEcore dims the page and offers you several styles of e-mail notification:

- ◆ **Digest:** ICEcore sends one message that summarizes all of the activity in the folder and its subfolders (available for folders only).

- ◆ **Individual messages:** ICEcore 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:** ICEcore sends one message for every new or changed entry, and messages include attached files.

3.1.6 The Clipboard

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

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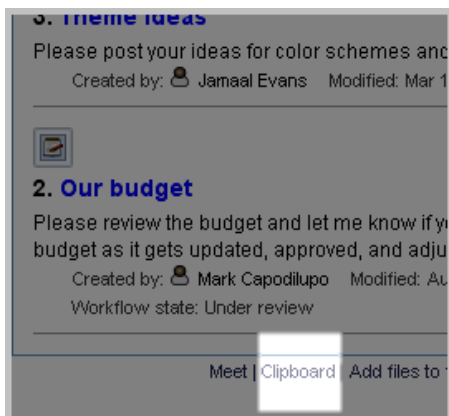
ICEcore then displays the *Clipboard* panel. You can use buttons on this panel either to add the names of everyone who authored an entry or comment on the currently displayed page, or you can use them to add the names of all team members associated with the currently displayed page.

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

Figure 3-27 *The Clipboard Panel*
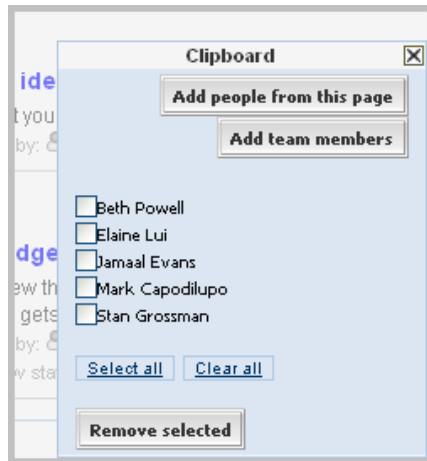
When you select the box next to names and then click the *Remove selected* button, ICEcore removes the checked names from the list and closes the *Clipboard* panel. You can also close the panel by clicking the *Close* icon (*X*) in the upper right corner of the panel.

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* ICEcore tool:

Figure 3-28 *Clipboard Names on the Send Mail Form*
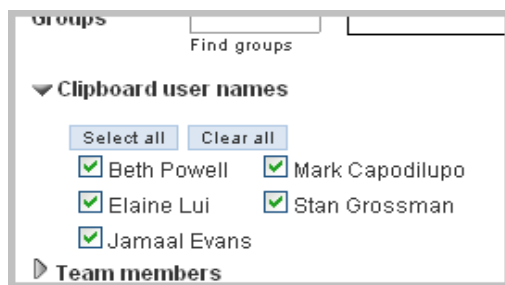
3.1.7 Entry-Reference Markup

When creating or modifying an entry, you can create a link to any other entry within ICEcore. 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*
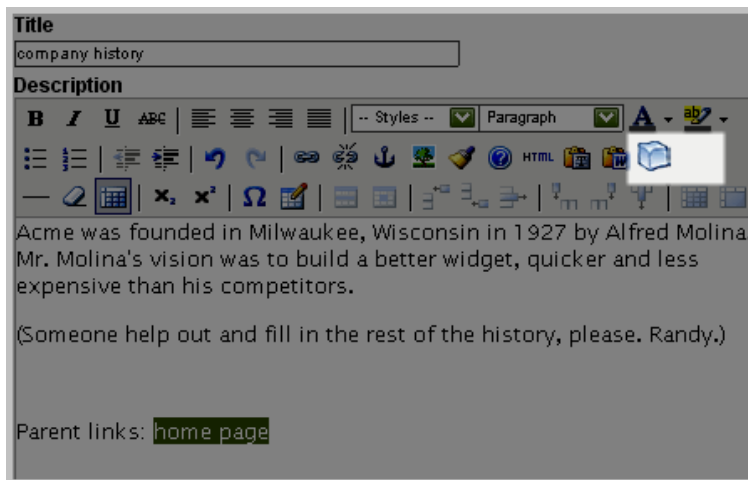
ICEcore displays a new window. In that new window, click the *Find* link:

Figure 3-30   *The Find Link*
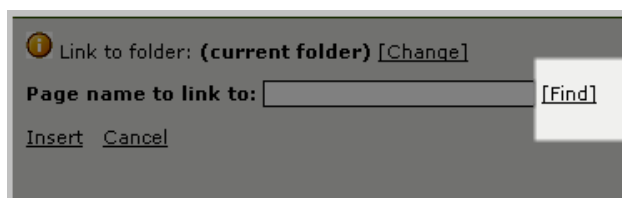
ICEcore displays the *Find a page* panel:

Figure 3-31   *The Find a Page Panel*

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

Figure 3-32   *Specifying a Page Name Using Type to Find*
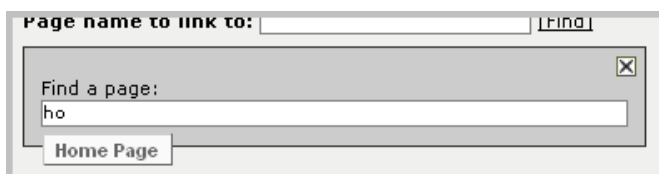
Select the correct entry title, and click the *Insert* link. ICEcore inserts the link into the body of your entry.

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 82).

3.1.8 The Five Star Ratings Tool

ICEcore 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).

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

Figure 3-33 *The Five Star Ratings Tool*
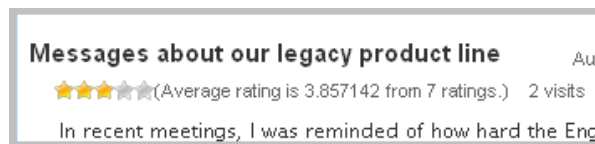
3.1.9 Workflow

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 ICEcore site administrator can use ICEcore folders as application platforms. Consult with your site administrators to determine if you have common business practices that can be automated by using your ICEcore 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 ICEcore Conference

ICEcore Conference 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 ICEcore installation.

The features of ICEcore Conference are described in separate documentation. However, the synchronous features (ICEcore Conference) and asynchronous features of ICEcore are integrated in helpful ways. As mentioned, ICEcore provides you with a buddy list portlet. Also, anywhere you see a person's name in ICEcore, 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 ICEcore Conference 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

ICEcore 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 ICEcore 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 ICEcore.

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:

3.2.1 Blogs

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

Figure 3-37   *A Blog Entry*
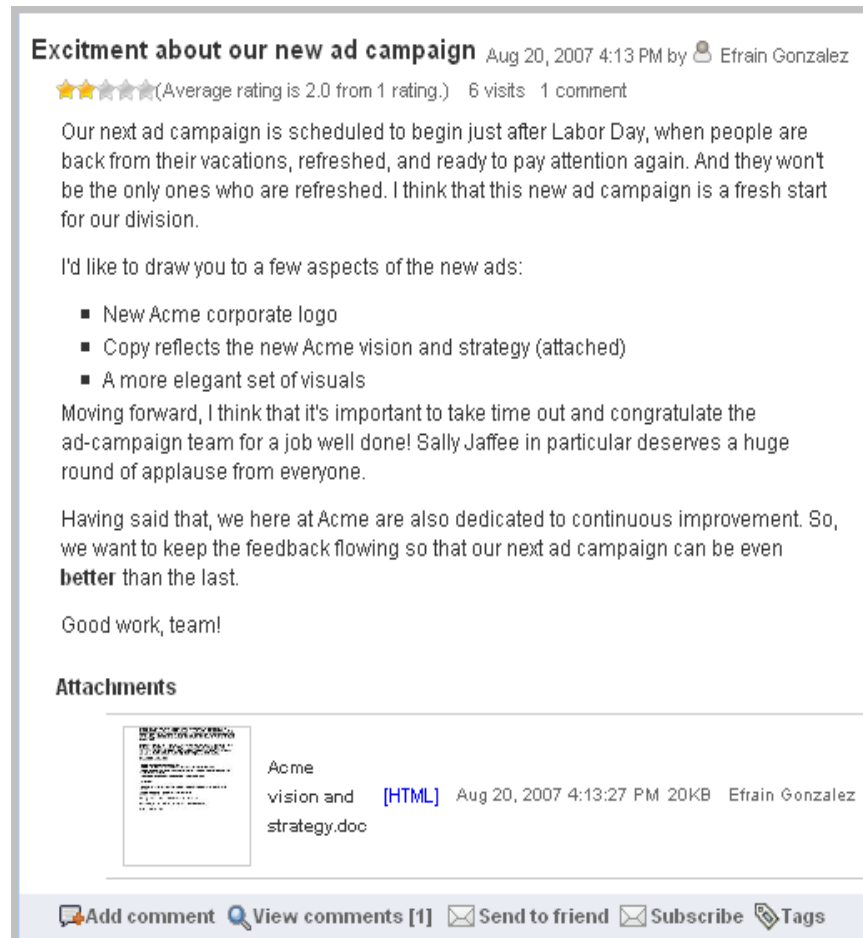
When you first view a blog folder, ICEcore displays all entries, from the most recently authored to the oldest (reverse chronological order).

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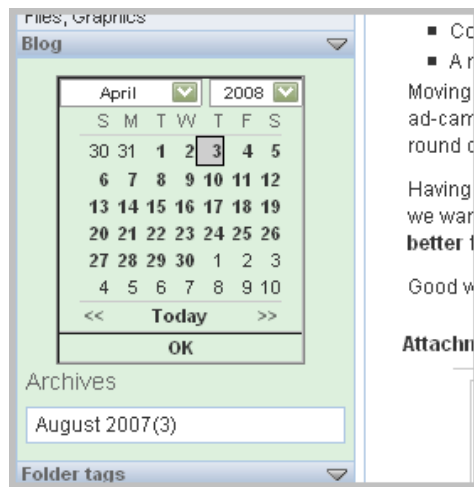
The Blog section of the tools sidebar in the previous picture includes a calendar tool and an *Archives* section.

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, ICEcore 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, ICEcore 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). If one or more entries are tagged, then ICEcore 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).

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	Act
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 bro		🧑 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 stra		🧑 Stan Grossman	3/1
5.	Check out this white paper		🧑 Stan Grossman	3/1
4.	Web 2.0/Ajax issues		🧑 Beth Powell	8/2
3.	Theme ideas		🧑 Jamaal Evans	3/1
2.	Our budget	Under review	🧑 Mark Capodilupo	8/2

New: Discussion entry   Folder view ▼   Folder action ▼

Filter: --none--   ▼ Edit   [1 to 10 of 11]   Show 10 entries ▼   Go to page   Go 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 ICEcore 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 ICEcore 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*
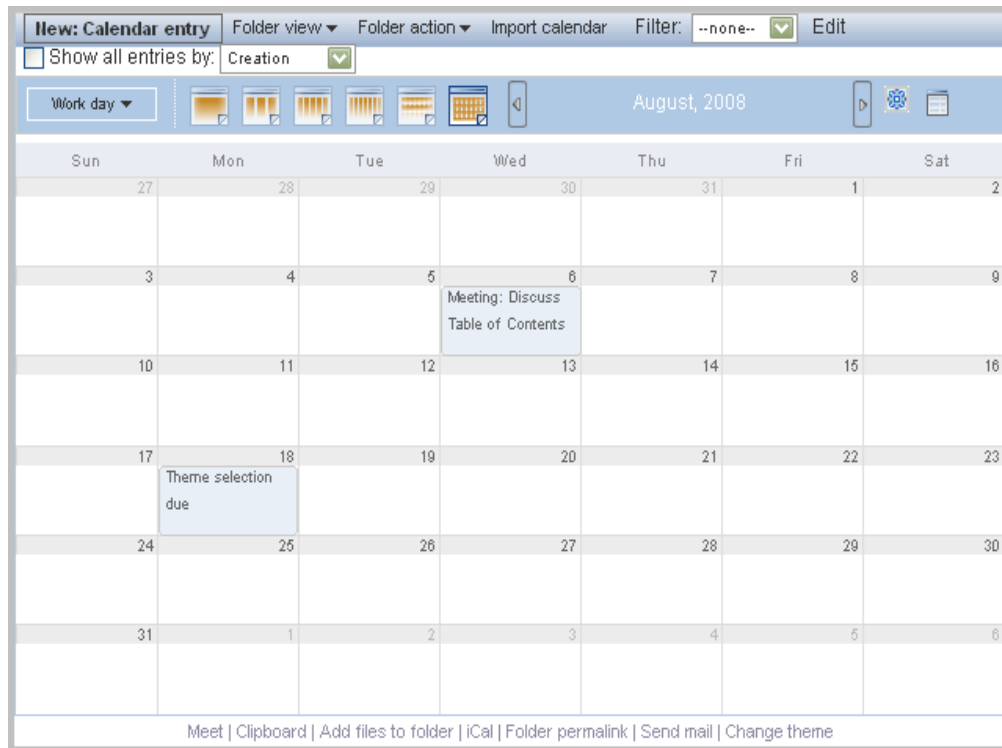
The menu bar contains a tool to import calendars:

Figure 3-41 *The Import Calendar Link*
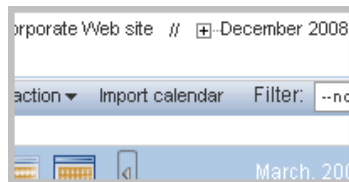
Most of the unique calendar tools appear under the menu bar:

Figure 3-42 *Calendar Tools*

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

Figure 3-43 *The iCal Link*
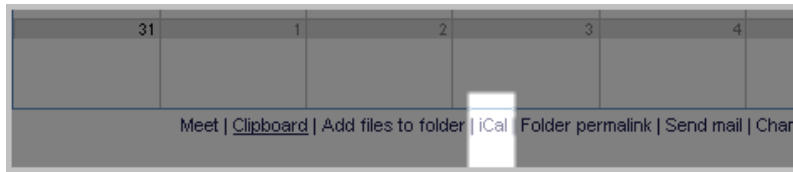
The following are some of the unique calendar tools:

- **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 74). Consider the following:

Figure 3-45 *A Folder File*

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 86 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*
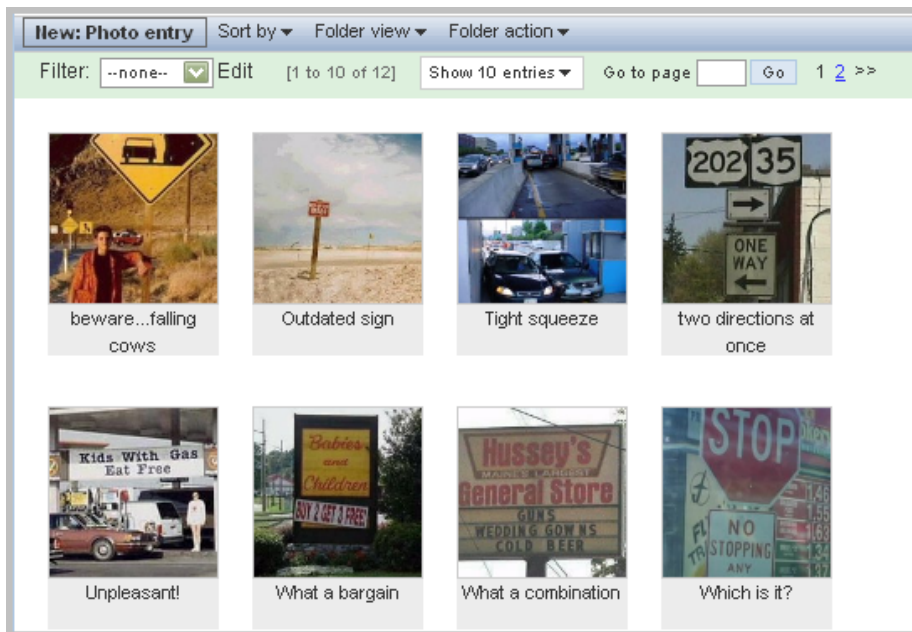
When you click a thumbnail picture, ICEcore displays the full-sized photo in a separate window:

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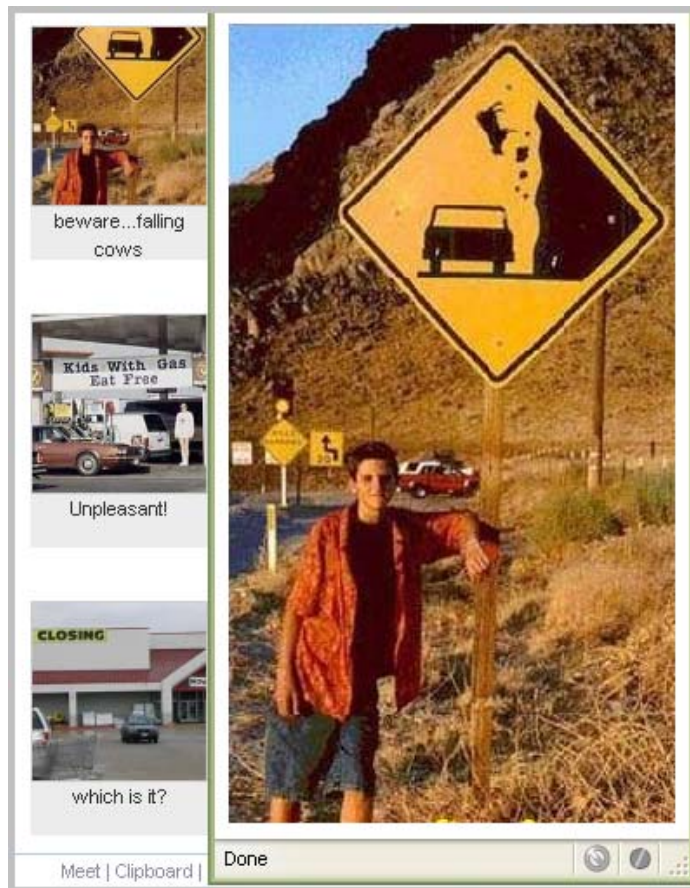
3.2.8 Surveys

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 Hernandes, 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 ICEcore 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*

The second question accepts only a single answer:

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

The third question requests a write-in response:

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

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*
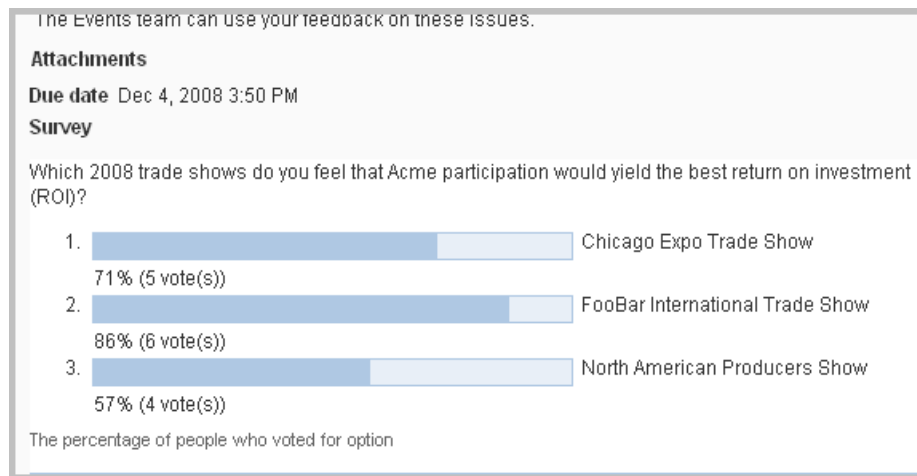
3.2.9 Tasks

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).

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*
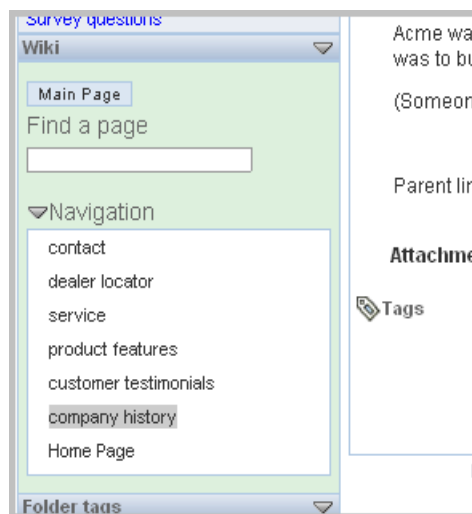
Use the type-to-find feature in the *Find a page* text box. The *Navigation* section lists all of the pages in the wiki folder. The standard folder tool, *Show xx entries*, determines how many page titles are listed here by default. If there are more pages, then ICEcore displays a right-arrow icon in 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, ICEcore 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*
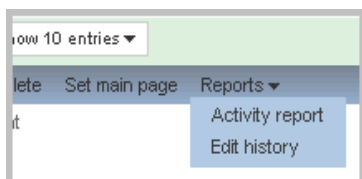
ICEcore displays a new browser window. In that window, select the edit versions that you want to review, and click *Compare*. This graphic indicates that you want to compare version 1 of the document (as indicated by the selected radio button in the first column) with its fourth version (as indicated by the selected radio button in the second column):

Figure 3-55 *The Edit History Form*

Edit history

Version			Data
◉ ○	1		▷ Mon Aug 20 18:59:20 GMT 2007
○ ○	2		▷ Mon Aug 20 19:02:06 GMT 2007
○ ○	3		▷ Mon Aug 20 19:23:47 GMT 2007
○ ◉	4		▷ Tue Aug 28 20:20:44 GMT 2007
○ ○	5		▷ Wed Sep 19 14:14:37 GMT 2007
○ ○	6		▷ Wed Sep 19 15:52:07 GMT 2007
○ ○	7		▷ Wed Sep 19 15:53:59 GMT 2007

[Compare]   [Close]

ICEcore 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*

[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 ICEcore.

This section contains the following subsections:

- Section 3.3.1, "Global Workspaces," on page 85
- Section 3.3.2, "Personal Workspaces," on page 85

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*
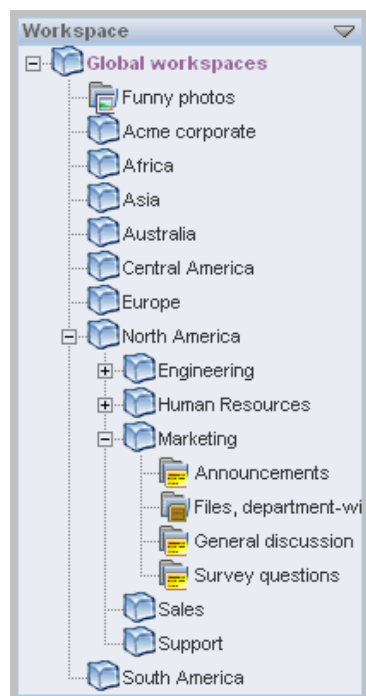
This example uses geography to organize the Acme company's global information, and then uses departmental categories (*Engineering*, *Human Resources*, *Marketing*) to further organize the information. Depending on your organization, you might want to reverse the order (function followed by geography) 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 ICEcore. Personal workspaces include contact information, a guestbook, pictures of you, your personal blog, and more.

Previous topics in this document describe personal workspaces (see).

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).

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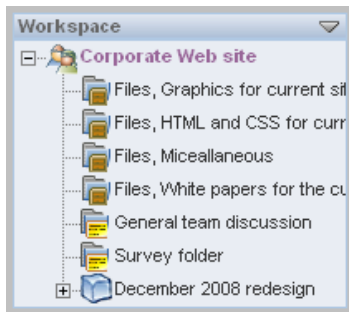
Within the *December 2008 redesign* project workspace, the project leader created standard folders (a discussion area and file folders for various types of files used in the project), a wiki folder to create page content for the Web site, and three task folders for several categories of work involved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

Figure 3-59   *Task Categories and Their Folders*
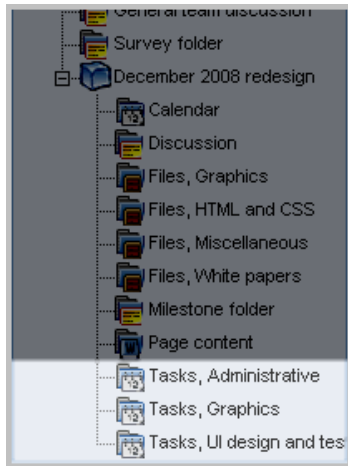
Each task folder contains tasks that fit that task category. The next graphic shows a picture of a task folder:

Figure 3-60   *A Task Folder*

This is the *Tasks, UI design and testing tasks* folder. ICEcore 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, ICEcore recalculates the summary located at the top of the folder. Finally, ICEcore 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, ICEcore displays a percentage value that corresponds to the location of the mouse. When the appropriate percentage is displayed, click the mouse, and ICEcore adjusts the *% Done* value:

Figure 3-61   *Changing the % Done Value of a Task*
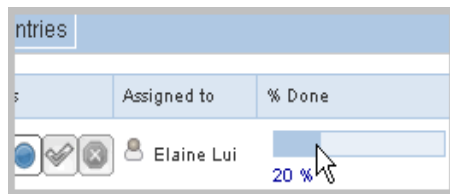
ICEcore allows you to import tasks from other software applications. You can import tasks from Outlook* or from other applications that export to files of these formats: `.ical`, `.ics`, `.ifb`, and `.icalendar`. To import tasks, view the task folder into which you want to import tasks, click *Import tasks* on the toolbar, specify the file containing the tasks, and click *Upload*.

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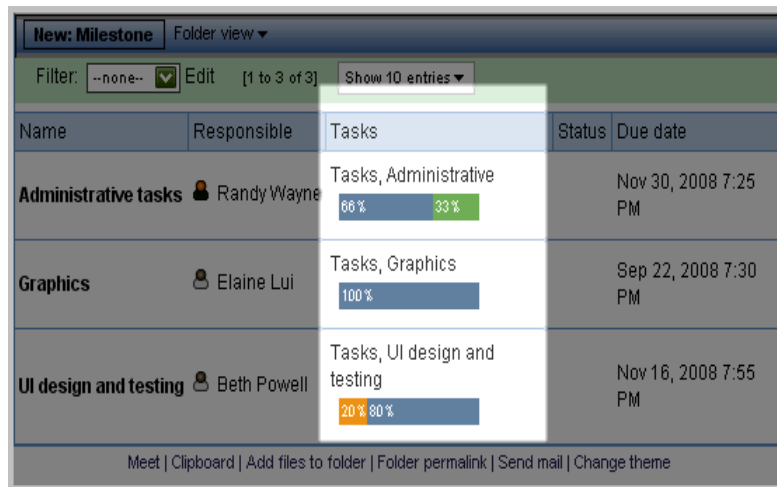
The milestones folder provides a snapshot of the status of each of the three task folders in our sample installation. Mouse over the colors in the bar chart, and ICEcore explains the value (needs action, in progress, completed).

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

Figure 3-63 *A Project Workspace Page*
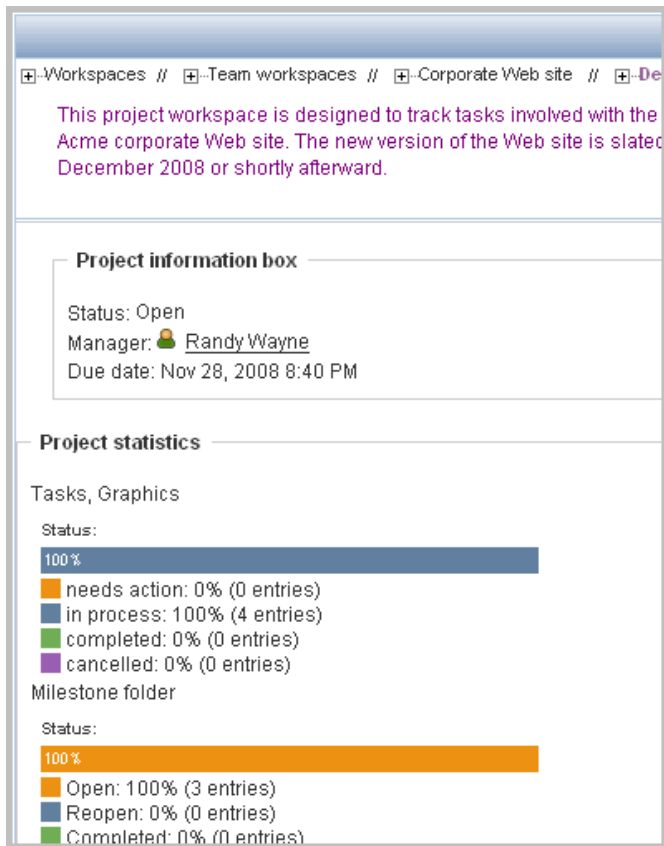
Troubleshooting

A

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

A.1 Your Presence Icon Does Not Change Color

Problem: When you sign in and view ICEcore pages, your presence icon does not change color to indicate that you are signed in, and it continues to display either the color that indicates no presence information (white) or that you are offline (gray).

If your presence icon indicates that there exists no presence information for you (white):

   1 View your personal workspace.

   2 Click *Modify profile*.

   3 Type your *Conferencing user name* for ICEcore Conference and its Pidgin client.

   4 Click *OK*.

If your presence icon indicates that you are offline (gray) when you are signed in, then you must start the Pidgin client on your computer. For more information about installing and running the ICEcore Conference Pidgin client on your computer, see your system administrator.

A.2 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, ICEcore 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.3 Too Many Sign-Ins for WebDAV

Problem: When using WebDAV, you must specify your ICEcore 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 ICEcore). It then might ask you to sign in again to access a file.

A.4 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 ICEcore Enterprise.

A mirrored folder is a library folder within ICEcore that is synchronized with a folder located outside of ICEcore, on a system drive. When performing basic actions (adding subfolders and files, modifying files, deleting folders and files) using either the ICEcore 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 ICEcore 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).

ICEcore 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 ICEcore 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 ICEcore menu items; ICEcore does not support scheduled synchronization. Synchronizing behaviors occur only upon using the ICEcore manual synchronization.
- When you delete a file on the server, ICEcore 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 ICEcore. Items whose headwords include an "(a)" are more relevant for ICEcore 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 ICEcore installation. Consult with your ICEcore 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 ICEcore 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 ICEcore Help system, which displays a dimmed page and information icons ("i"). When you click on an information icon, ICEcore 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 ICEcore Conference messaging software.

LifeRay (a)

The portal software within which ICEcore runs by default.

meeting

An online communication by teammates, using the ICEcore Conference messaging software. ICEcore Conference 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 anyplace within ICEcore 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 ICEcore, 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. ICEcore runs within portlets.

presence

A person's online status (online, away from the computer, offline, status unknown), represented in ICEcore 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 ICEcore default role definitions.

site administrator

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

state

See workflow state.

subscription

A way to track new or changed items in ICEcore.

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 ICEcore 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 ICEcore 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 ICEcore.