Novell
Teaming + Conferencing

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About This Manual

This manual provides getting-started information for new users of Novell Teaming + Conferencing. Novell Teaming + Conferencing is implemented using ICEcore technology. In this manual, the term "ICEcore" applies to all versions of ICEcore unless otherwise noted.

This manual presents more detailed descriptions of the information found in the *ICEcore Quick Tips Guide*, including more pictures.

Audience

This guide is intended for all new ICEcore users.

Contents of this Manual

This manual provides information about the following:

- ICEcore concepts, definitions, and navigation
- Getting-started procedures
- Glossary

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.

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

What you see	What it means
Click the *Add a team workspace* button. Click the *Getting Started* link. A *team workspace* is defined as.... Read the *ICEcore Quick Start Guide*.	References items that are clickable on the page, labeled parts of the user interface, new terms, and book titles are presented in *italic* font.
Blog summary - Provides a.... **Wiki** A wiki is a....	References items that are clickable on the page, labeled parts of the user interface, new terms, and book titles are presented in **bold** font.
Type `status`, then press Enter. Open the `ManagerGuide.pdf` file.	Text that you must type and file names are presented in `Courier` font.

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

Documentation Updates

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

Additional Documentation

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

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

This document describes how to use ICEcore Help mode, which documents pages and tools within the product.

Understanding ICEcore

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Novell Teaming + Conferencing is implemented using ICEcore technology. In this manual, the term "ICEcore" applies to all versions of ICEcore unless otherwise noted.

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

This chapter provides overview information about the product and about navigating its pages. If you prefer to "learn by doing," you may want to begin by reading .

This chapter includes:

1.1 ICEcore is Collaboration Software

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

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

- You and your teammates can work together without having to be in the same room or working at your computers at the same time. Someone can post a note or document to a folder, and, at their convenience, teammates can comment on the work, review and edit files, and further develop the idea. With ICEcore, teamwork is ongoing and potentially never ending.

- When you are working online at the same time, the *presence* feature of ICEcore allows you to see which teammates are currently online, and allows you to start a Zon chat session, create an online meeting, make a Skype phone call, and so on.

- Ideas are formed together, interactively, with your teammates. By the time you hold that meeting in the conference room, the team has already been a part of the formation of the idea, and teammates are more likely to understand it, buy into it, and assist with its implementation. ICEcore becomes a "pre-meeting" meeting.

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

1.1.1 ICEcore is Knowledge Management Software

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

Consider the following examples:

- ◆ When people use their personal workspaces to provide detailed information about themselves, the purpose of the workspace moves beyond merely contact data (phone numbers, e-mail addresses, Zon username). 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 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 -- *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.

1.2 Navigating ICEcore

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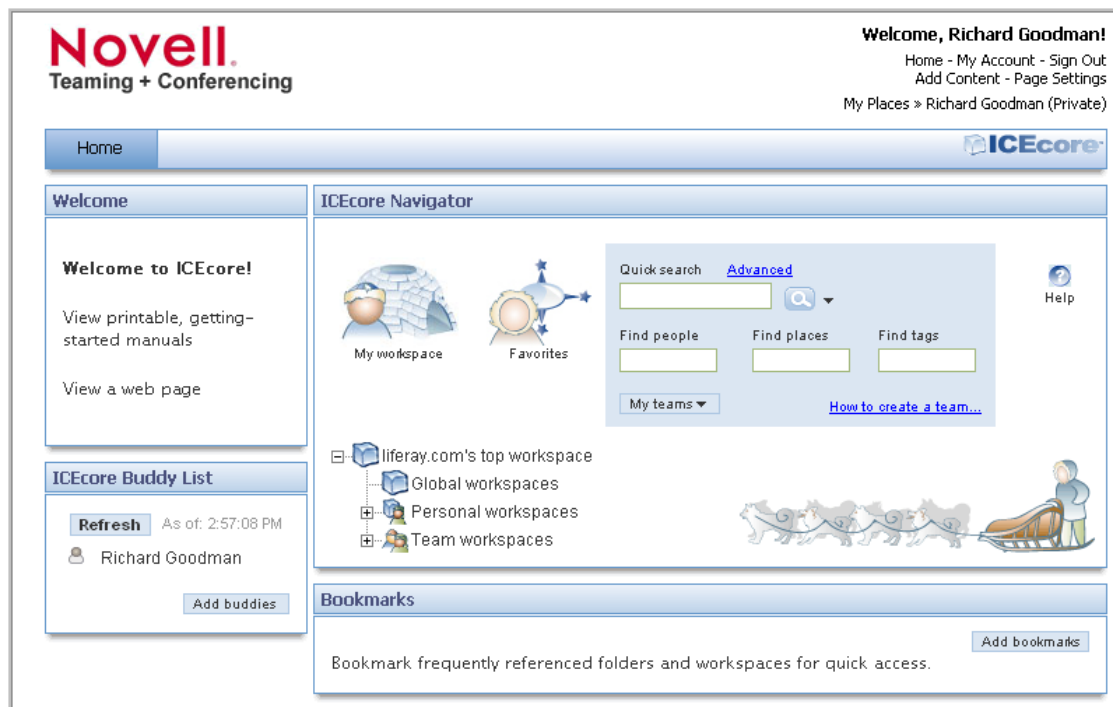
A portal page is a web page that presents different applications in subsections within the page. On the Internet, you may have seen pages (for example, Google and Yahoo) that have page sections presenting a weather report that is local to your area, stock quotes that are of interest to you, the local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

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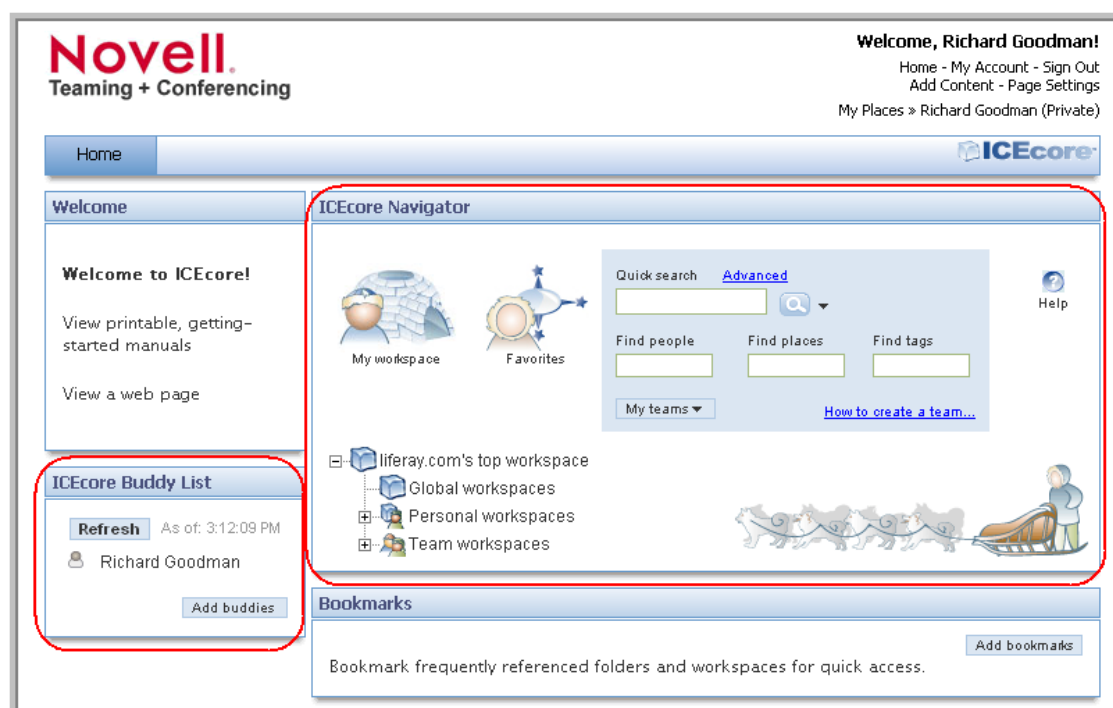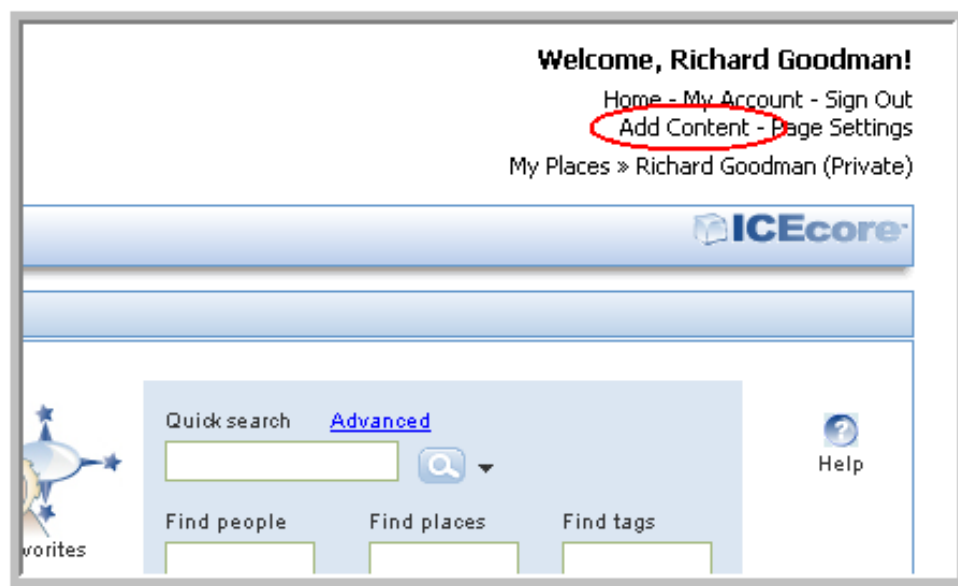
1.2.1 The Default ICEcore Portlets

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

- **The welcome portlet** -- Provides quick access to getting-started PDF manuals (including this manual) or to a getting-started web page.

- **The navigation portlet** -- Gives you quick access to any workspace or folder you want to view in ICEcore, to your personal workspace or to your favorite places, to items that match search criteria, or to Help for the current page.

- **The buddy-list portlet** -- Displays the presence of people you designate as your buddies, and provides tools you can use to contact your buddies.

- **The bookmark portlet** -- Provides links to important workspaces and folders, and can provide a count of new or changed entries in folders.

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

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

- **Blog summary** -- Provides a snapshot of journal entries from a blog of your choice within the ICEcore installation.

- **Guestbook summary** -- Provides a snapshot of entries from your choice of ICEcore guest book.

- **ICEcore administration** -- Displays tools for ICEcore site, workspace, and folder administrators.

- **Photo gallery** -- Presents pictures from your choice of an ICEcore photo gallery.

- **Search** -- Presents items, potentially anywhere within ICEcore, that match search criteria.

- **Wiki home page** -- Displays a summary of the home page of an ICEcore wiki folder.

- **Workspace tree** -- Allows you to go to any place you want within ICEcore. (The navigation portlet also contains a workspace tree.)

1.2.2 The Navigation Portlet

Here is a picture of the navigation portlet:
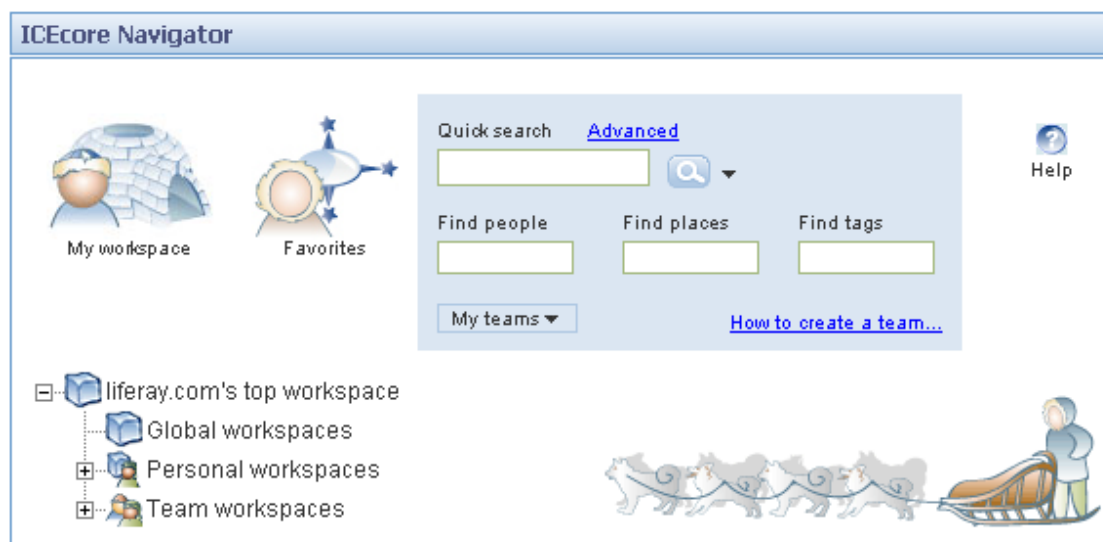
The navigation portlet provides the following tools:

- **My-workspace icon** -- Displays your personal workspace, which contains your contact information, pictures, a personal blog, and much more.

- **Favorites icon** -- Displays a tool you can use to list links to your favorite workspaces and folders, and 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 and workspace and folder owners can apply to items in ICEcore).

- **Help** -- Provides access to the getting-started PDF books, and provides Help about various sections of the portal page.

- **My-teams drop-down list** -- Lists links to all of the workspaces and folders in which you are designated as being a team member.

- **Workspace tree** -- Allows you to 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 subworkspaces entitled "Global workspaces," "Personal workspaces," and "Team workspaces."

Global workspaces are containers for information available to anyone in your organization. *Personal workspaces* are pages 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.

1.2.3 Viewing a Workspace or Folder

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

For example, you can click on plus sign (+) next to the *Team workspaces* link in the workspace tree to see available team workspaces. Using our sample installation, clicking on the plus sign next to the *Team workspaces* link causes the workspace tree to appear as follows:
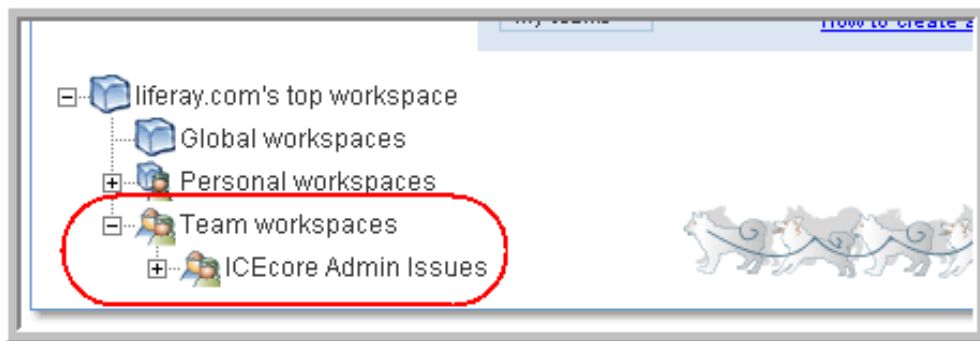
The "Team workspaces" workspace contains a single subworkspace, whose title is "ICEcore Admin Issues." Again, using our example installation, clicking on the plus sign next to "ICEcore Admin Issues" workspace title displays the contents of that workspace, as follows:
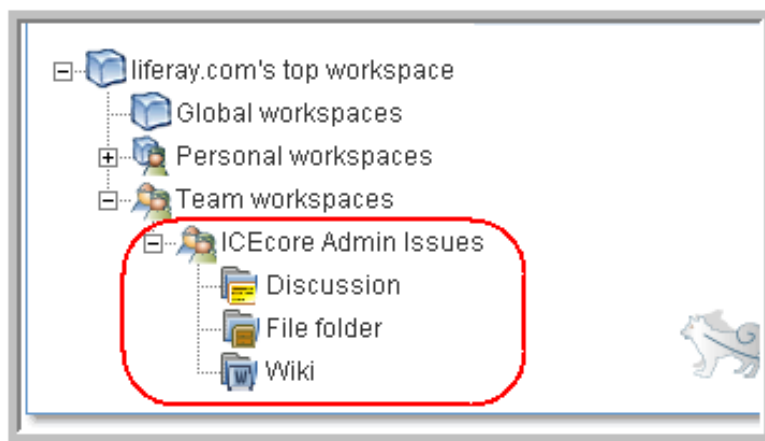
The "ICEcore Admin Issues" workspace contains three folders. Folders can, in turn, contain *subfolders*, which further organize information. None of the folders in the previous picture contain subfolders.

To view a folder, click its linked title. In the last picture, if you click on the *Discussion* link in the "ICEcore Admin Issues" workspace, ICEcore leaves the portal page and displays the Discussion folder in its own page in your browser window, as shown on the following page.
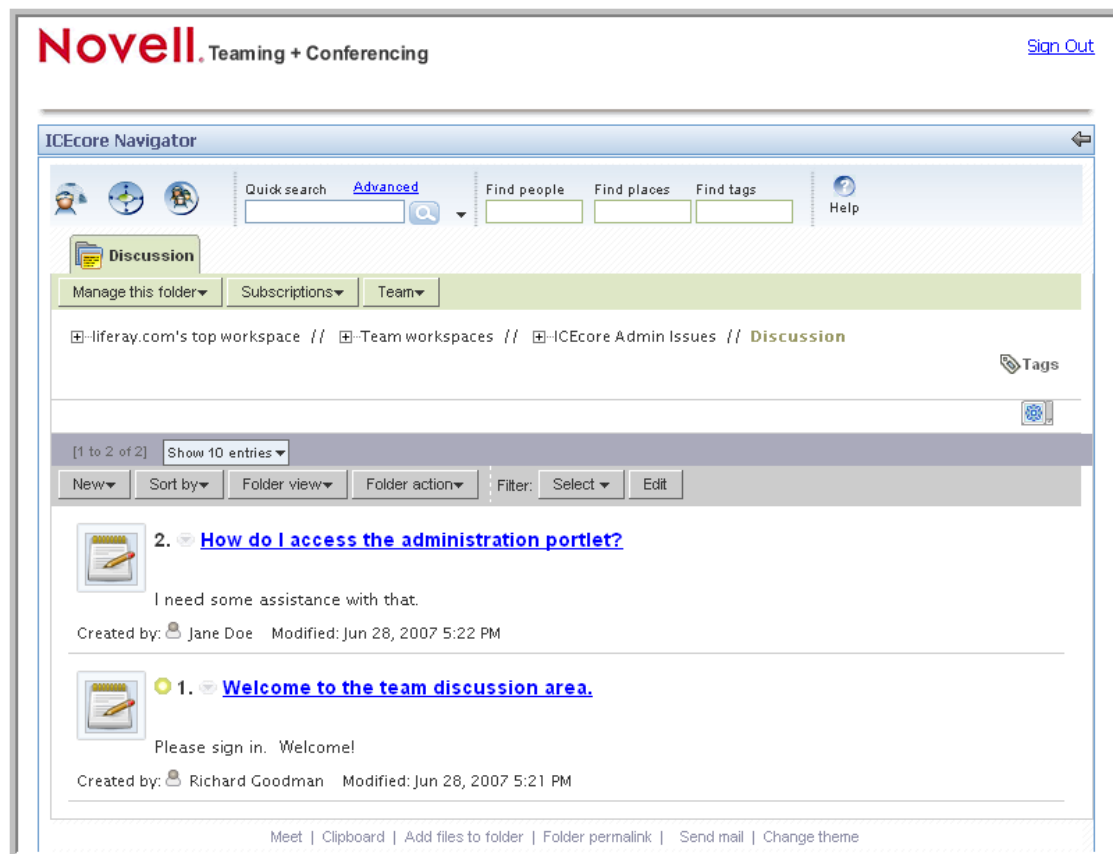
Notice that ICEcore displays most of the navigation-portlet tools at the top of a workspace or folder page, as follows:
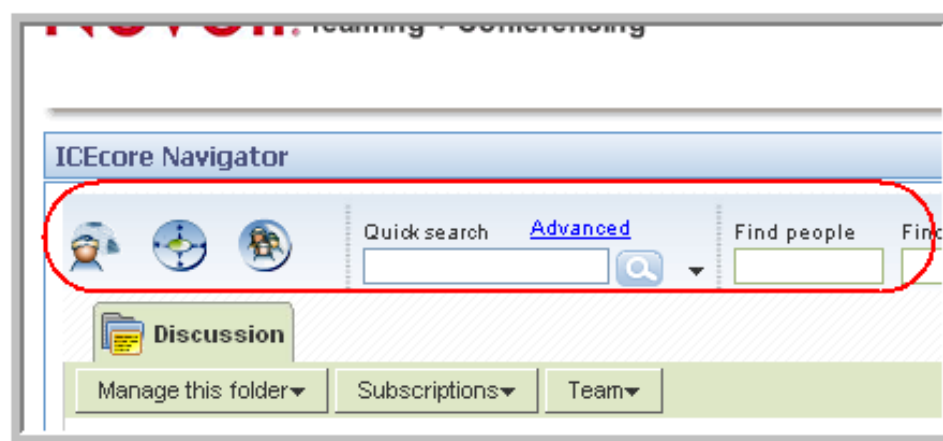
By default, a folder lists only a summary of each discussion entry. To view the entire entry, click the title of the entry, as shown on the following page.
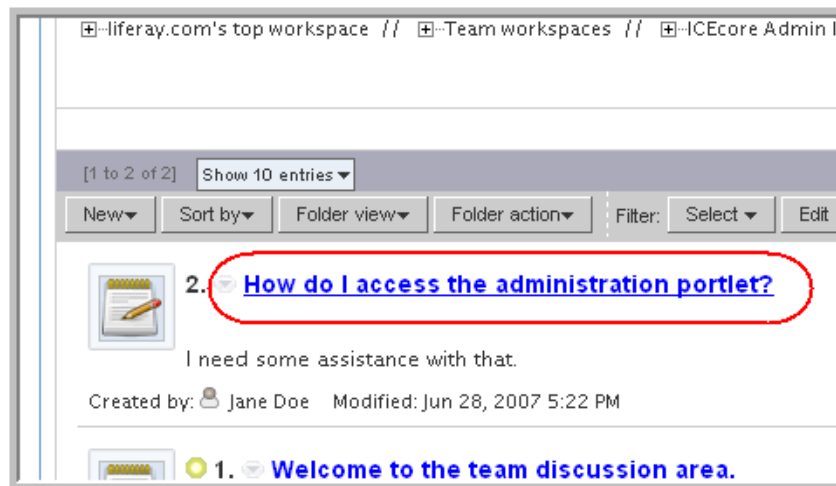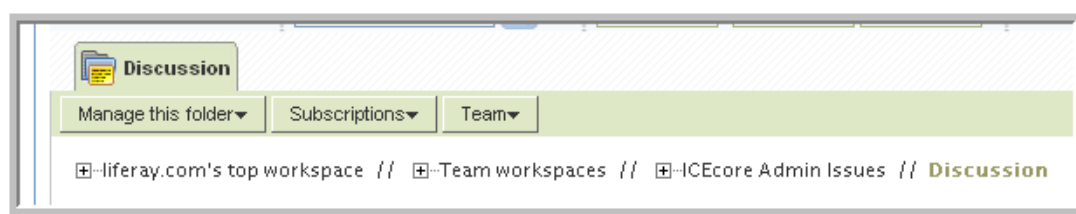
By default, ICEcore displays the discussion entry as an *overlay*, on top of the current page, as follows:
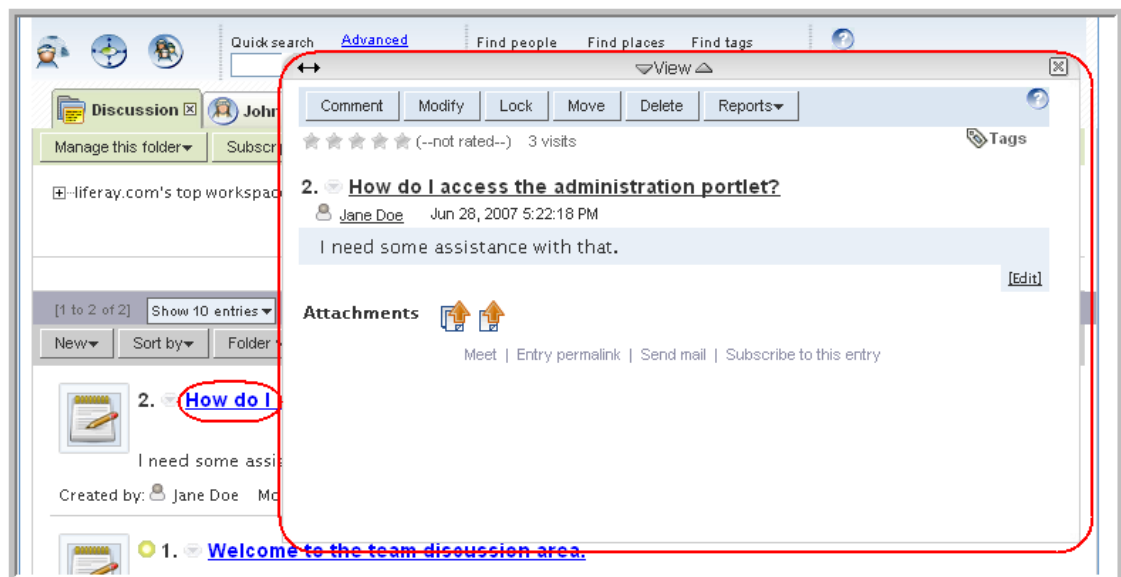

1.2.4 Using Tabs

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

ICEcore creates a tab that is named using the title of the currently displayed folder ("Discussion"). If you click on an item in the workspace tree, ICEcore opens the new place in a separate tab. So, for example, if you click this link:
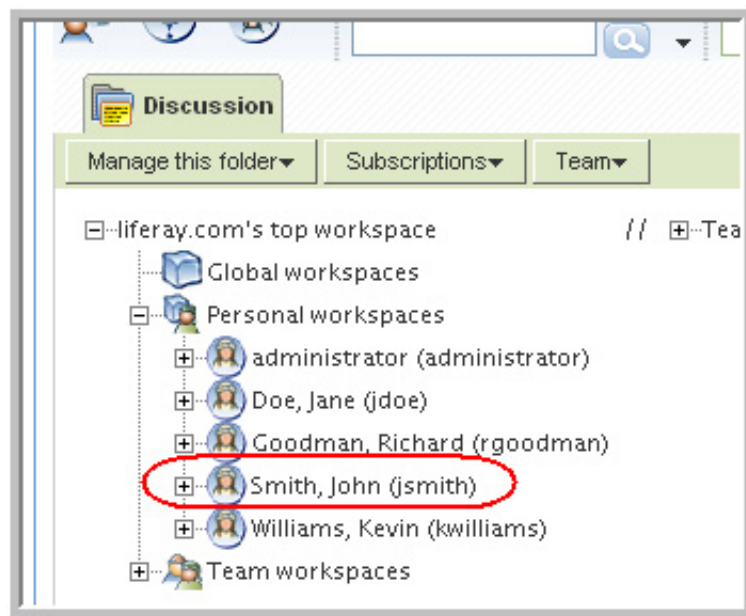
ICEcore displays the personal workspace page in a new tab, as shown in the picture on the next page. To delete a tab, click the Close icon (*X*) in the upper-right corner of the tab.

1.2.5 Returning to the Portal Page

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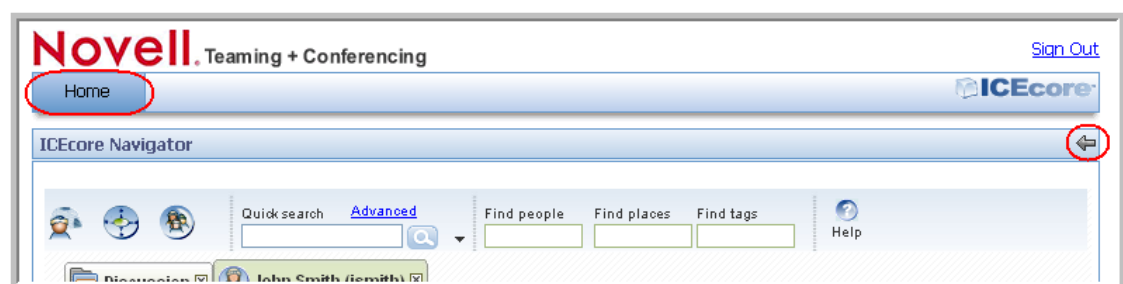
1.3 Using ICEcore Help

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

When you click this icon, ICEcore 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 exists Help information, as follows:
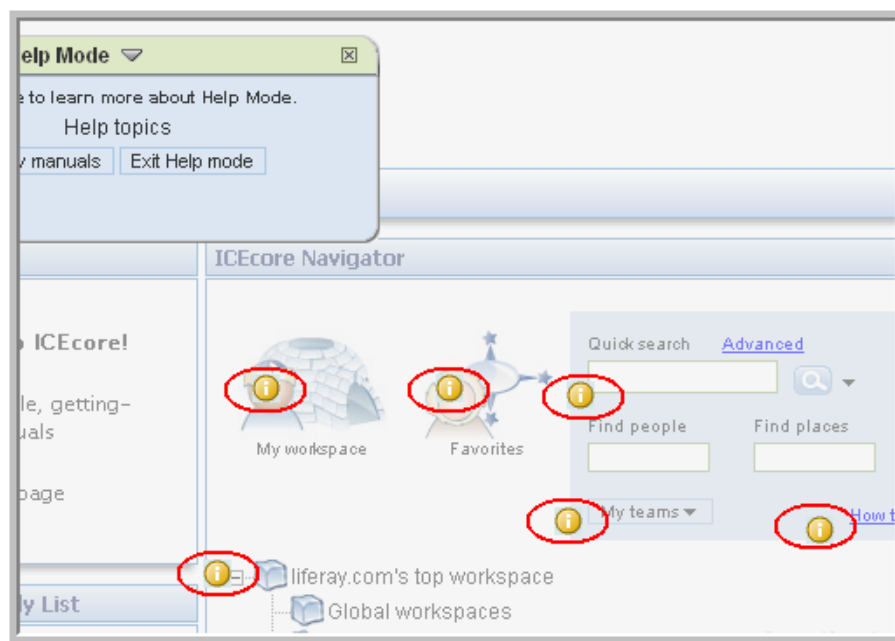
Click the information icon over the portion of the page about which you want more information. When you do, ICEcore displays a panel of information. When you are finished reading the panel, click the Close icon (*X*) in the upper-right corner of the panel to close it. The picture on the following page shows a panel of Help information and its Close icon.
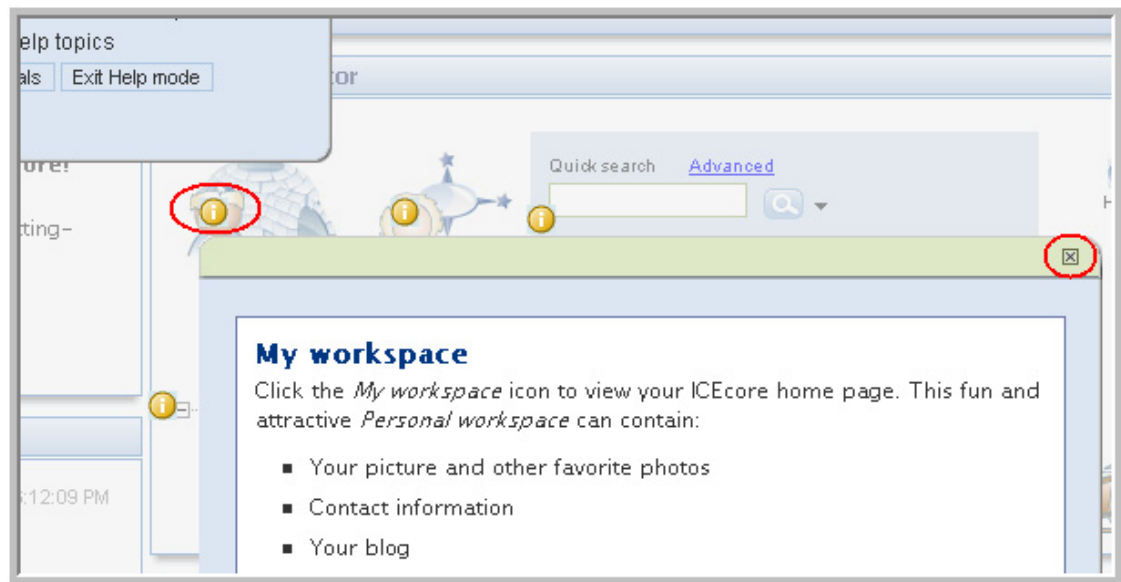
Some Help topics have more than one page of information. To move to and from pages in a Help topic, you can use the linked numbers and arrows at the bottom of the page, as follows:
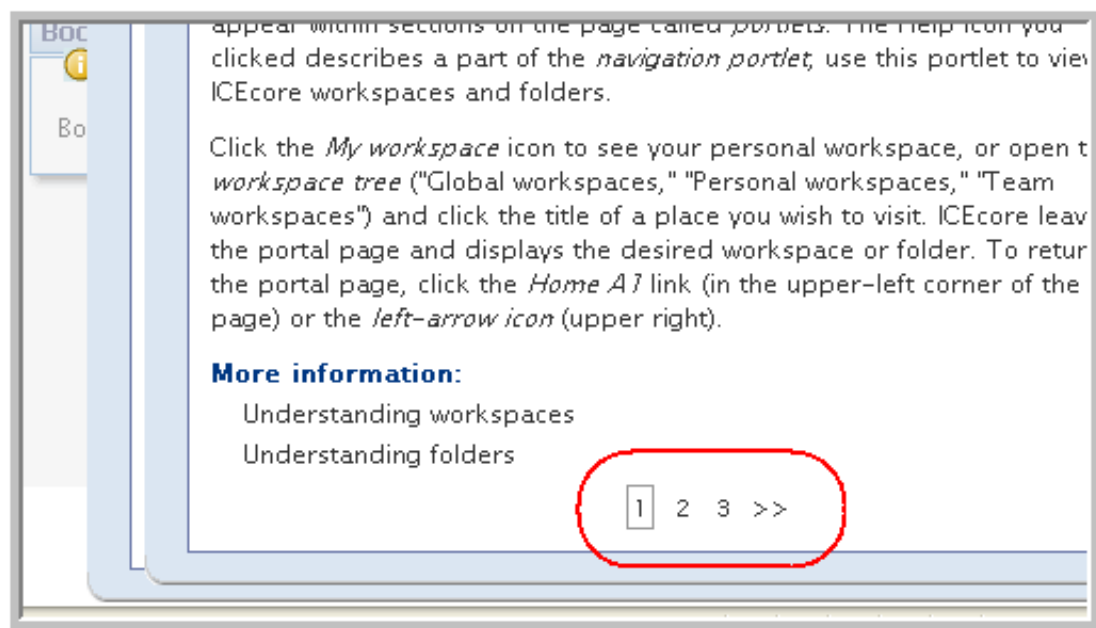

The Help topic in the previous picture has three pages. Either click the number of the page you want to view, or click the double-right arrow to move forward, and the double-left arrow to move backward through the topic.

You might find that you want more room on the page to click information icons. If you choose, you can minimize the Help-mode control panel. To do so, click the right-arrow icon, as shown on the following page.
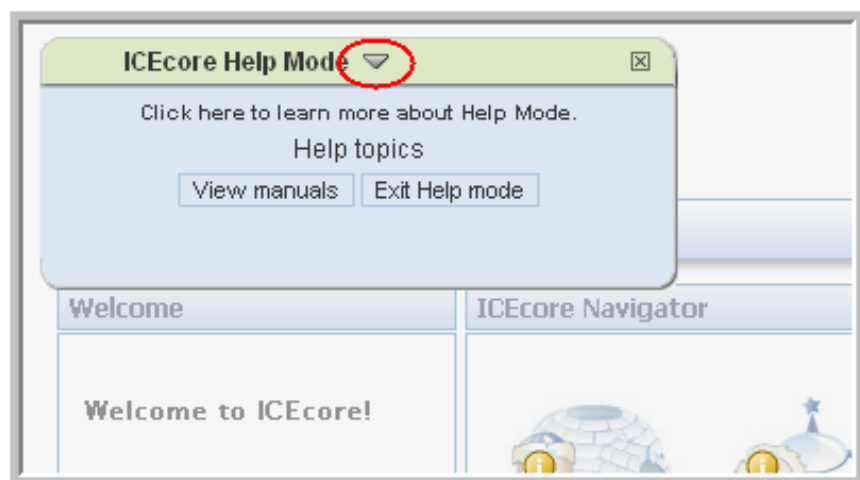
After you minimize the control panel, it appears as follows:
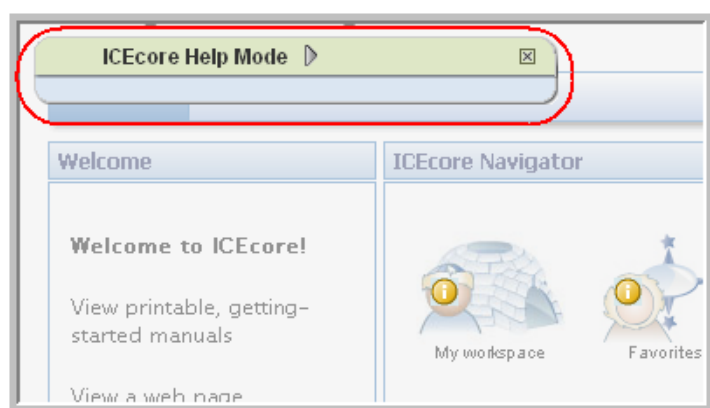
To view getting-started PDF manuals, click *View manuals* in the control panel. To exit Help mode, either click the Close icon (*X*) in the control panel, or click any dimmed part of the page. Consider the following:
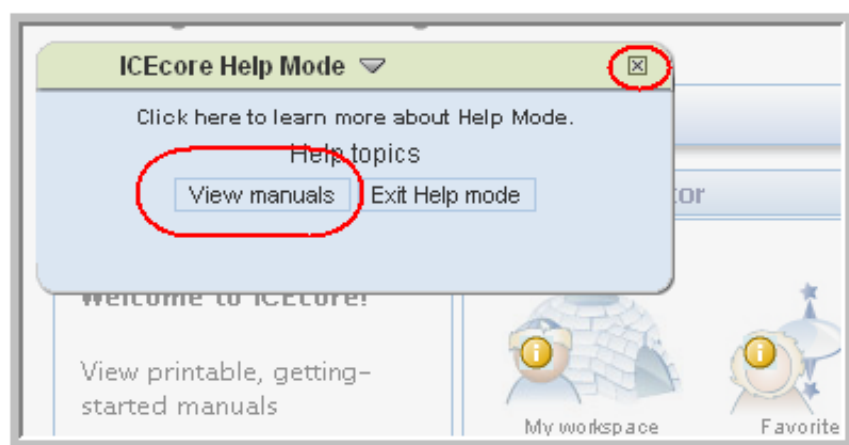
1.3.1 Help for Administrators

Site administrators and administrators of the top workspace in the tree 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** -- Is the process of determining the content and appearance choices of pages used by workspaces, folders, and entries.

- **Access control** -- Determines who has the right to perform which tasks in which places.

- **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 are a site administrator, a workspace administrator for the top workspace in the tree, or someone who would like to read more about these topics, do the following:
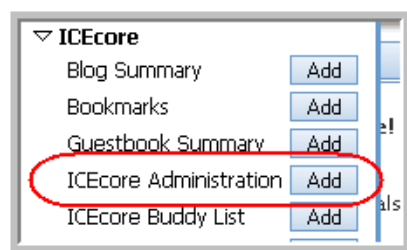
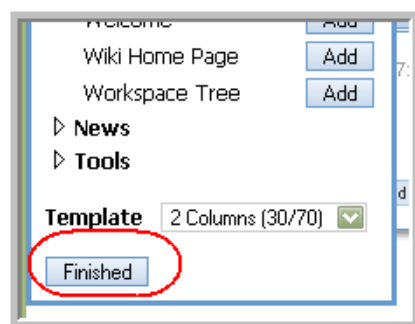1. On the portal page, click *Add Content*:
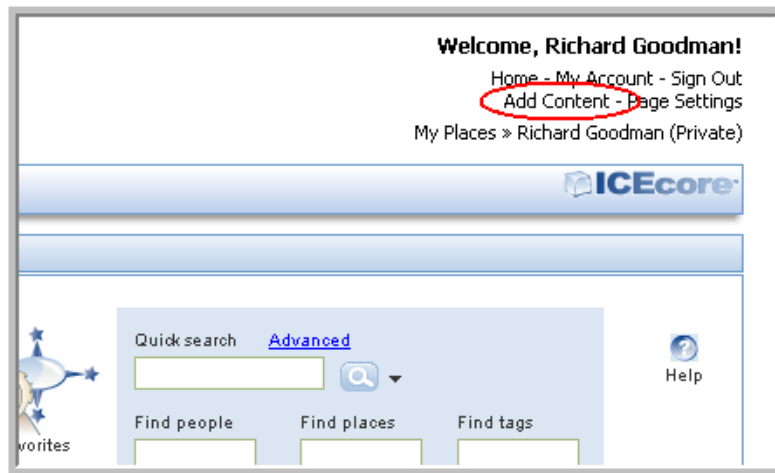
2. Click *ICEcore*, as shown in the picture on the next page.
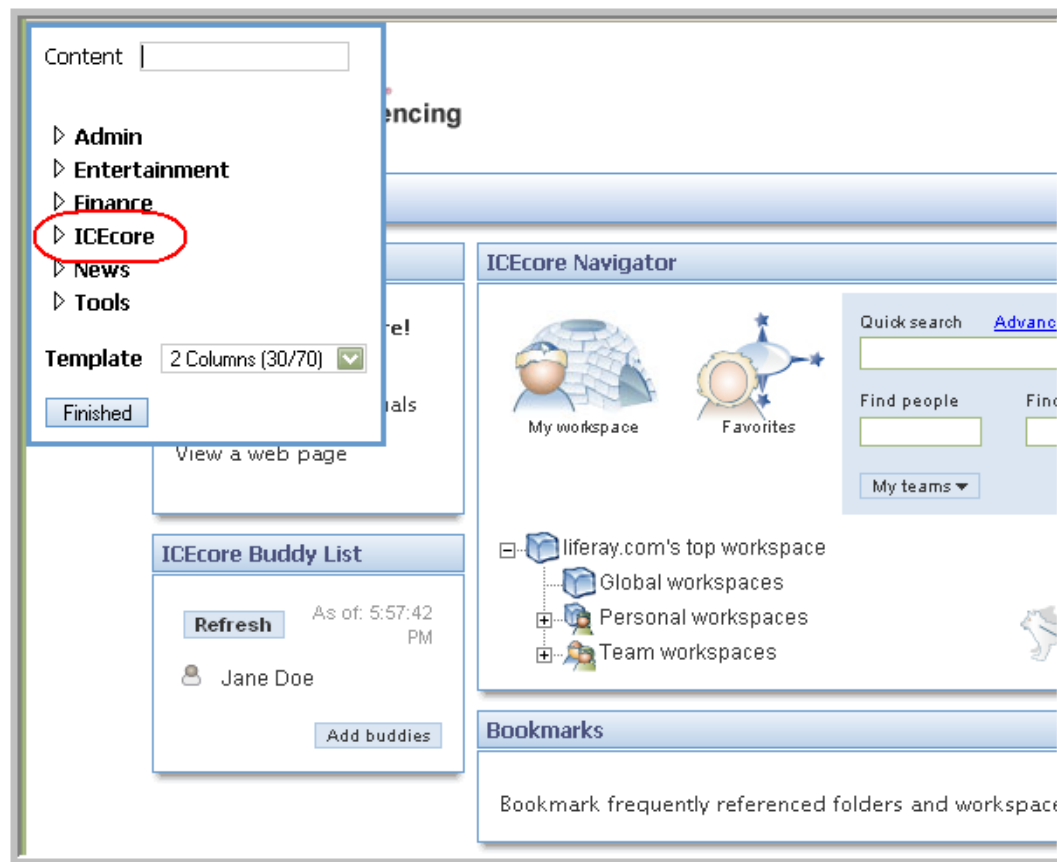
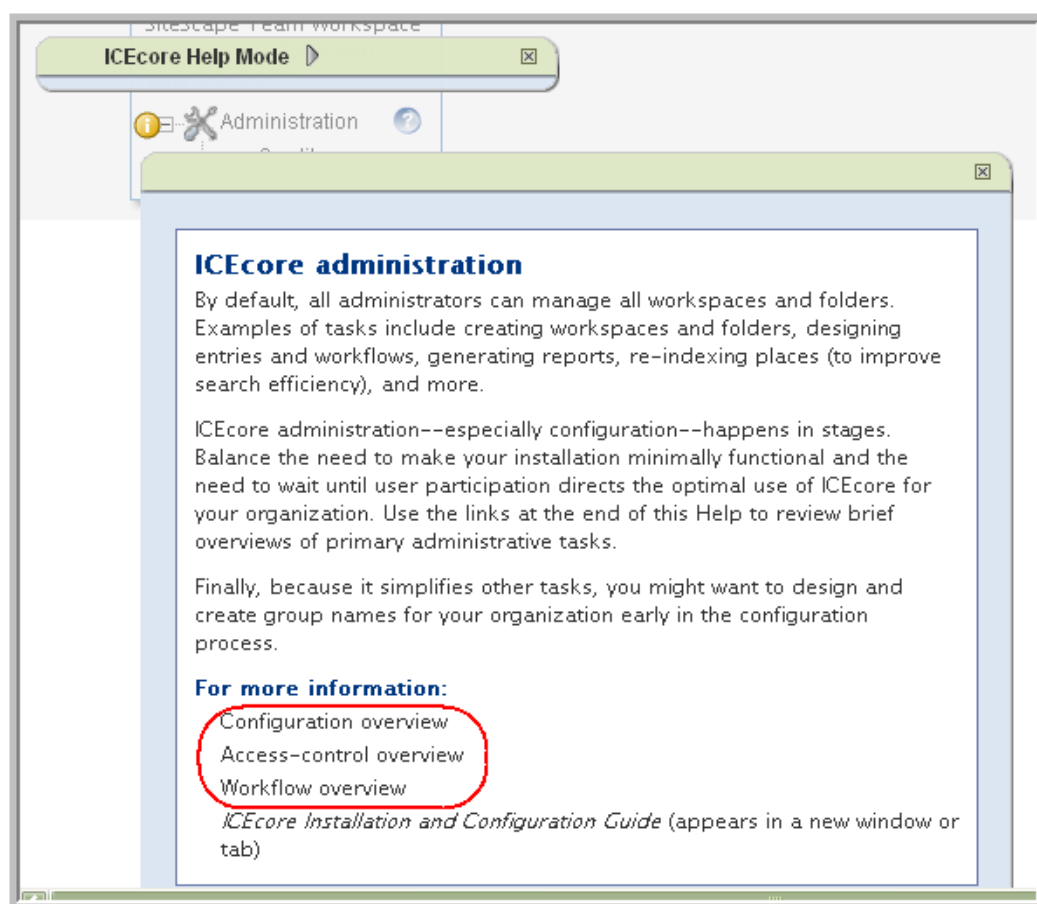3. Click *Add* next to the ICEcore Administration label:

4. Click *Finished*:

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:

Getting Started

This chapter describes initial tasks for new users who are learning how to use ICEcore.

This chapter contains the following information:

2.1 Set Up Your Buddy List

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

Although presence icons are present 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 you see your buddies' online starts as soon as you sign in.

To set up your buddy list:

1. Sign in with your username and password.
2. Locate the ICEcore Buddy List portlet:
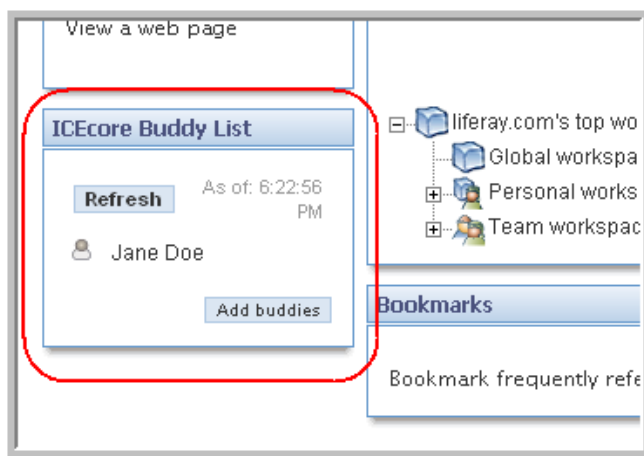
If you do not see the portlet, click *Add Content* in the upper-right corner of the portal page, click *ICEcore*, click *ICEcore Buddy List*, and click *Finished*. ICEcore adds the buddy-list portlet to the portal page. If you require more assistance, see your ICEcore site administrator.

3. In the portlet, click *Add buddies*.

   ICEcore displays the "Configure buddy list" page.

4. Begin typing the first few letters of either the first or last name of a buddy, and then click that person's linked name in the drop-down list.

   ICEcore includes the "type to find" feature. When you place your cursor in a text box that requires a known type of information, such as a name, ICEcore displays a list of links to all possible items:

As you type characters ICEcore adjusts the list to match what you type. The following examples shows what happens in the example installation when someone types a letter:
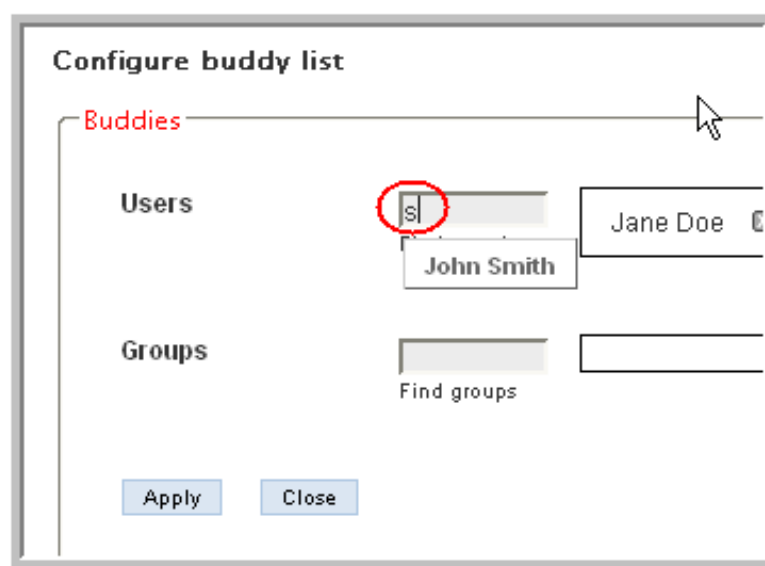
ICEcore displays a list of links of all the people whose first or last names match what you have typed so far. Click the linked name to add that person to your buddy list.

5. Click *Apply*.

6. 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:

7. Click *Closed*.

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

Tips for using buddy lists

- Here are the descriptions of the presence icons:

  Online

  Away (recently online)

  Offline

  Status unknown

- To communicate with a buddy, click the presence icon and select a communication method (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 Modify Your Personal Workspace

As the next step when learning to use ICEcore, it can be fun to create a comfortable working space for yourself in your personal workspace.

Your personal workspace is your ICEcore homepage or start page. Like any workspace, such as your desk at work or wood shop at home, it can be helpful to brighten and organize 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 may 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.
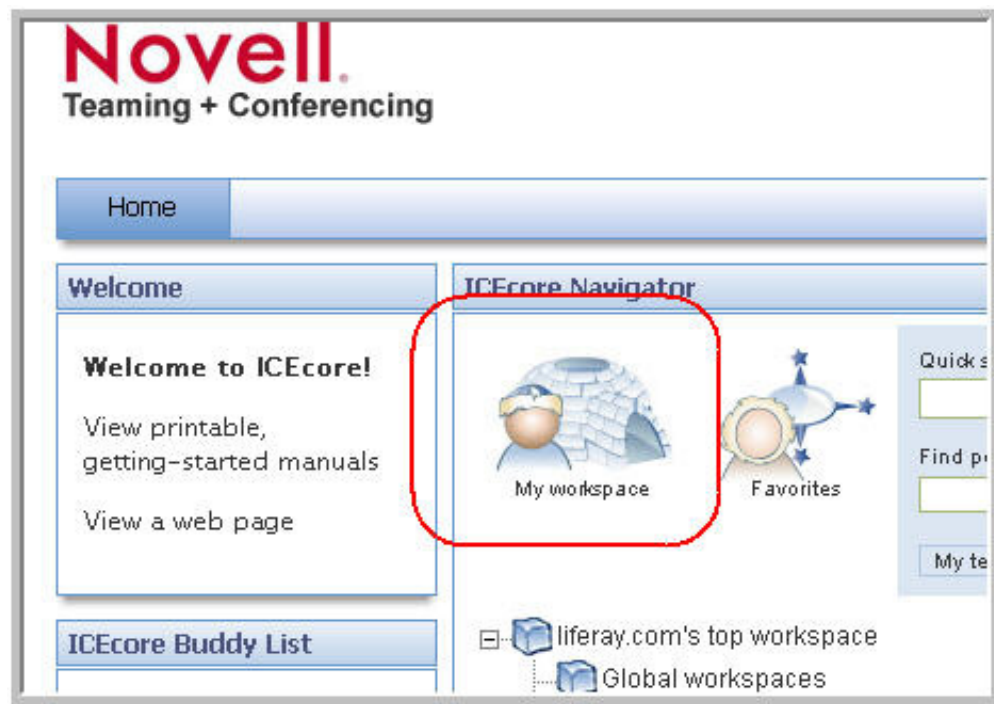
This section contains:

2.2.1 Add Basic Information

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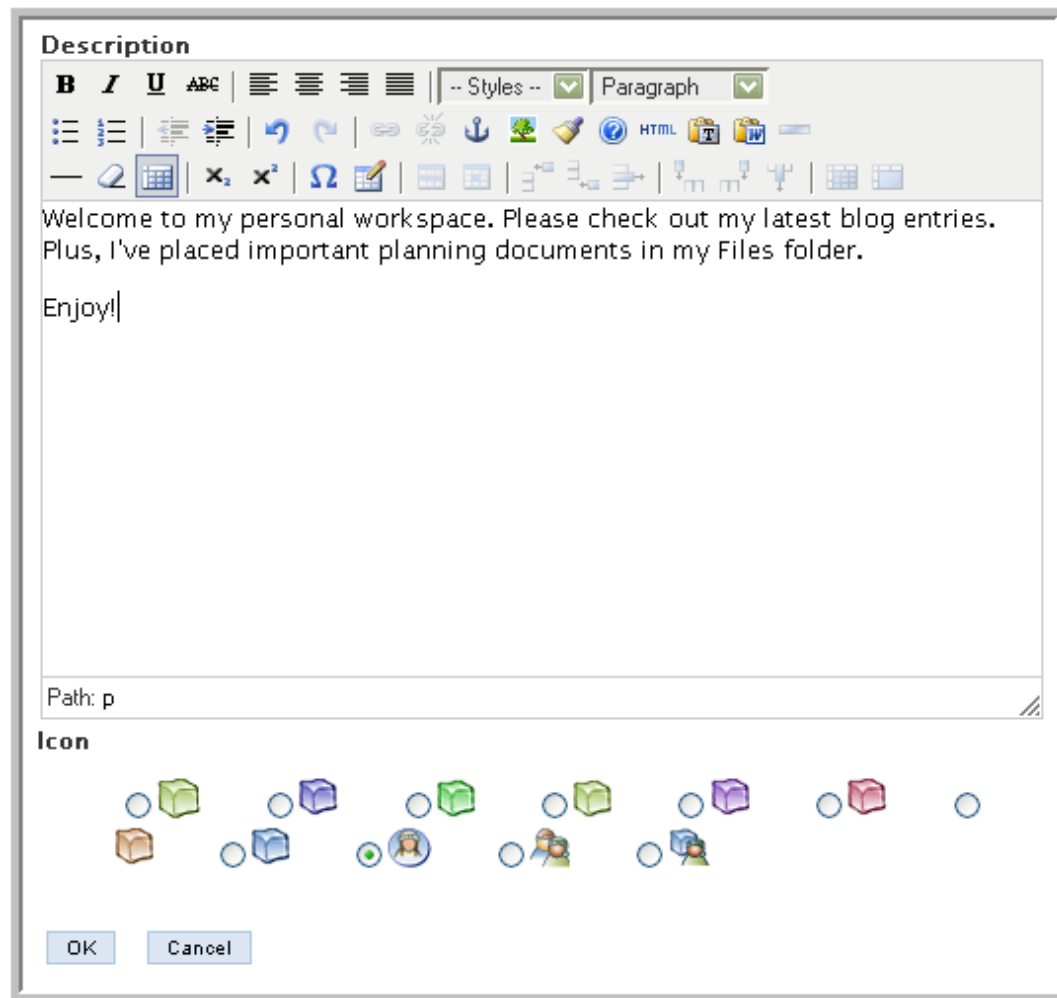
To modify your personal workspace, do the following:

1. On the portal page, click the *My workspace* icon in the navigation portlet:

2. Click *Manage this workspace > Modify this workspace*:

   ICEcore displays a form that allows you to add a personal description to your personal workspace, as shown in the picture on the next page.

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.
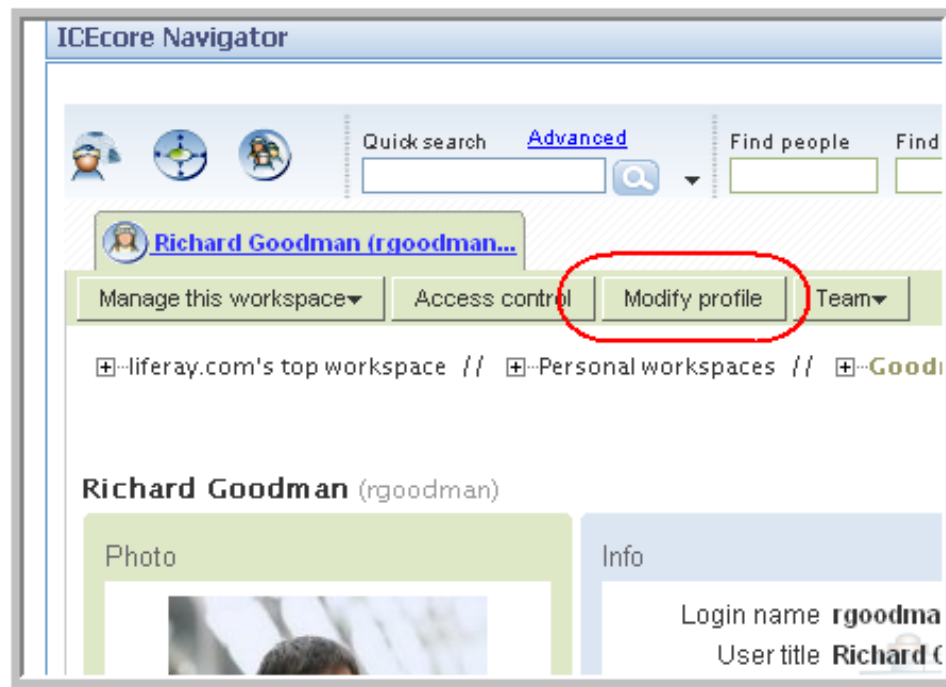
3. Click *OK*.

2.2.2 Edit 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 your specify your Zon 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 the *Modify profile*:

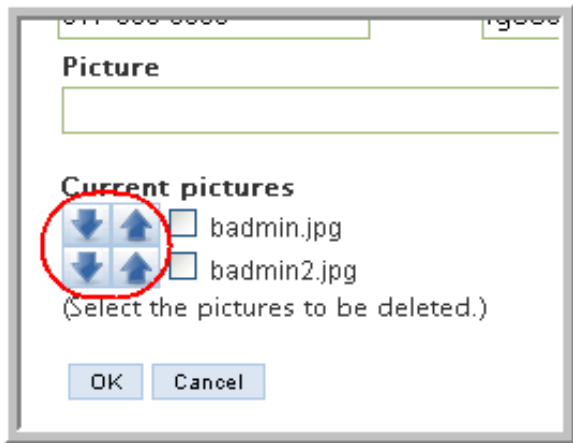ICEcore displays a form that allows you to alter contact information and upload pictures.

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

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

ICEcore places the filename of the picture in the "Current pictures" section of the page.

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 or down arrow to reposition the picture in the list (why not place your best picture first):
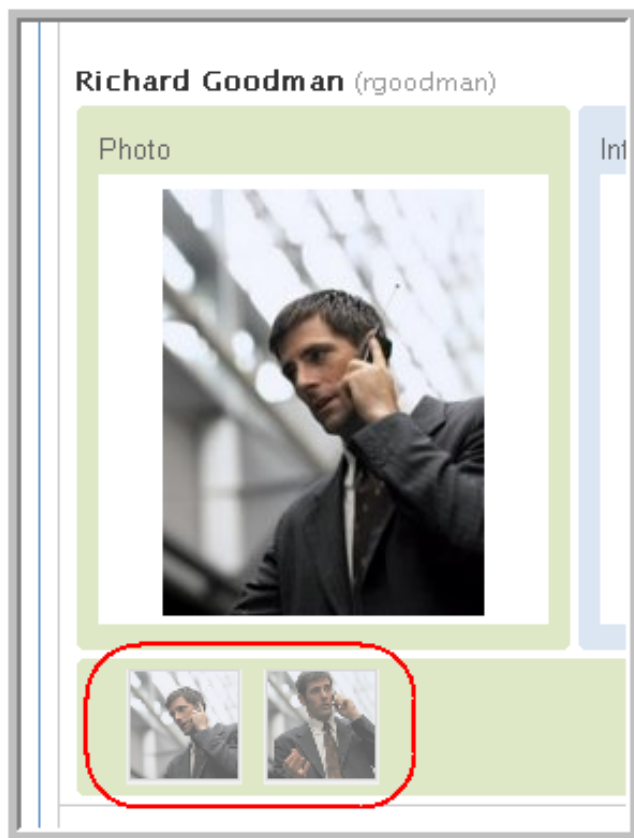
To delete a picture from your personal workspace, click the check box next to the filename, and ICEcore removes it after you submit the form.

6. When 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) in a bar below the contact information:

Tips for uploading images

- You may add as many pictures as you like, but you must add them one by one.
- When viewing any personal workspace, move your cursor over the thumbnail pictures in the bar below the contact information, and ICEcore displays each picture as the main picture in the contact-information section.
- Click any of the pictures in the personal workspace, and ICEcore displays a full-size version of that picture.

2.2.3 Add a Blog Entry

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

From a teamwork perspective, a blog can be a great idea to present your newest ideas to your teammates in a fun, 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 formal.

To add an entry to your blog:

1. View your personal workspace page.
2. In the workspace tree on your personal-workspace page, click the plus sign (+) next to your name.
3. Click the title of your blog folder (*Blog*, by default):
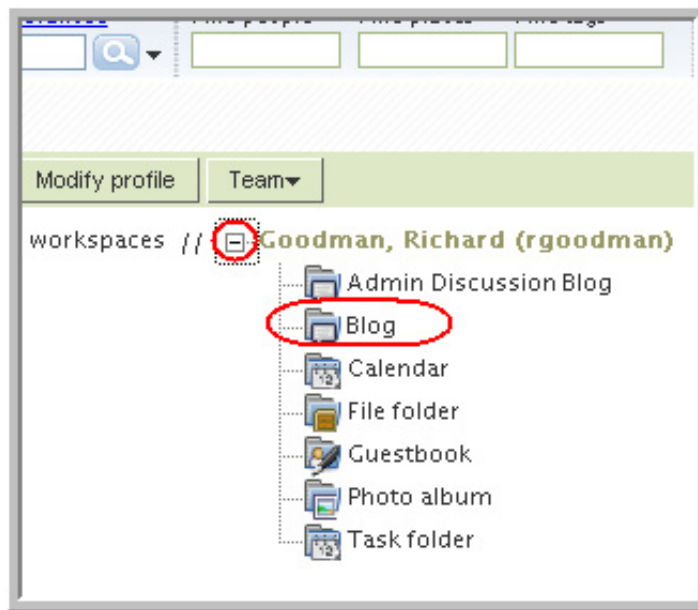
4. Click *New > Blog entry*:
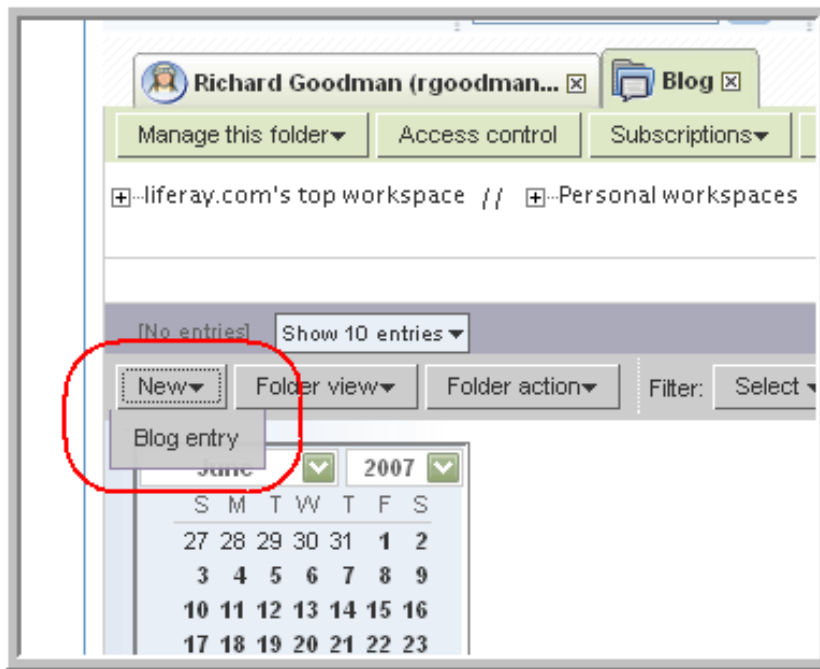
5. Provide a title, and type your journal entry in the Description section.

6. If you choose, you can click *Browse* to upload a picture in the Attachments section of the form.

7. Click *OK*.

This is an example of a blog entry:

The picture on the following page shows you the content of the entry:

Later, you can check your blog entry for comments:

Click *View comments* to see them:

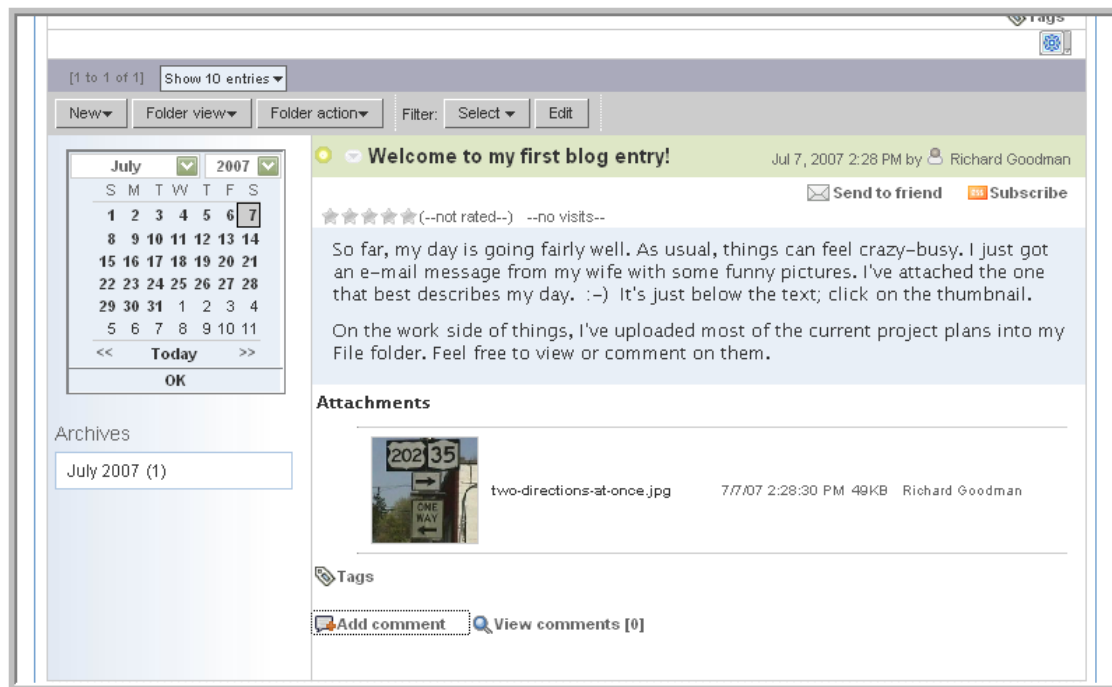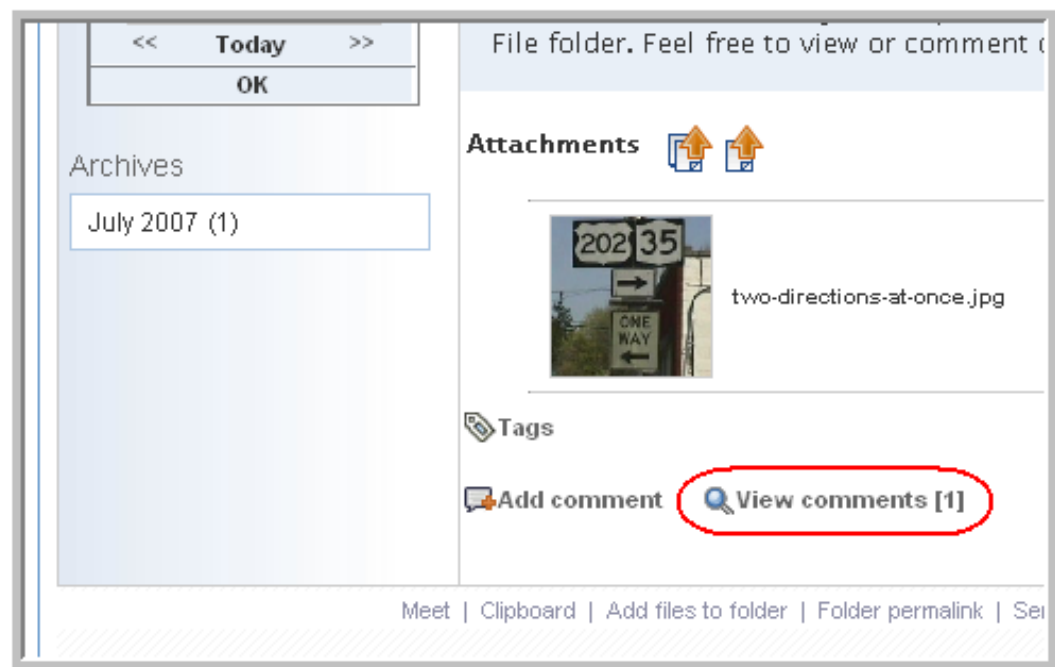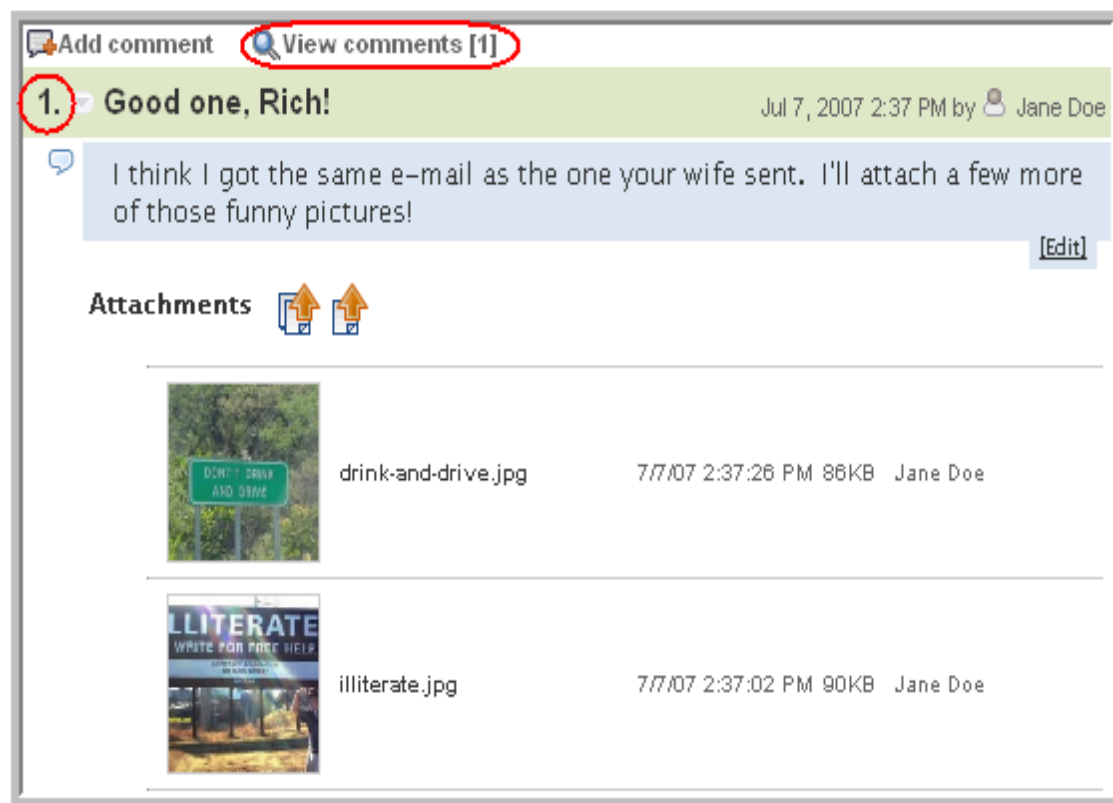**Tips for writing blog entries**

- 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 Collaborating with Others

You completed the minimum number of tasks to get started using your personal workspace. Developing a vibrant, purposeful collaboration space requires striking a balance between having something for people 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.

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 workspace tree, click the plus signs (*X*) to open the "Personal workspaces" tree and the personal-workspace tree of the person whose blog you want to read:
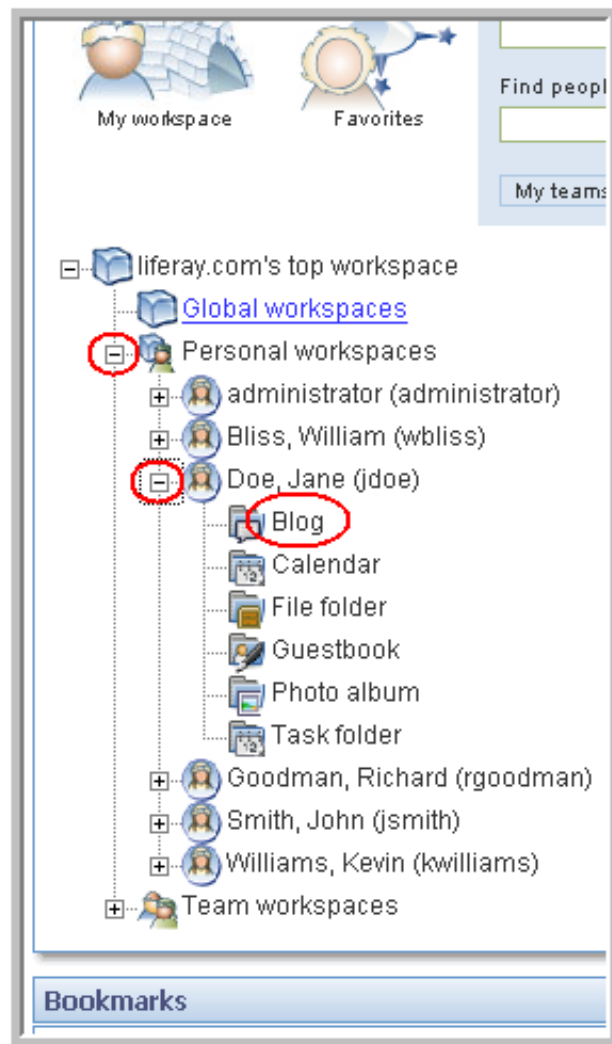
3. At the bottom of a blog entry, click the *Add comment* link:

4. Provide a title and content for your comment:

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

ICEcore adds your comment to the blog entry:
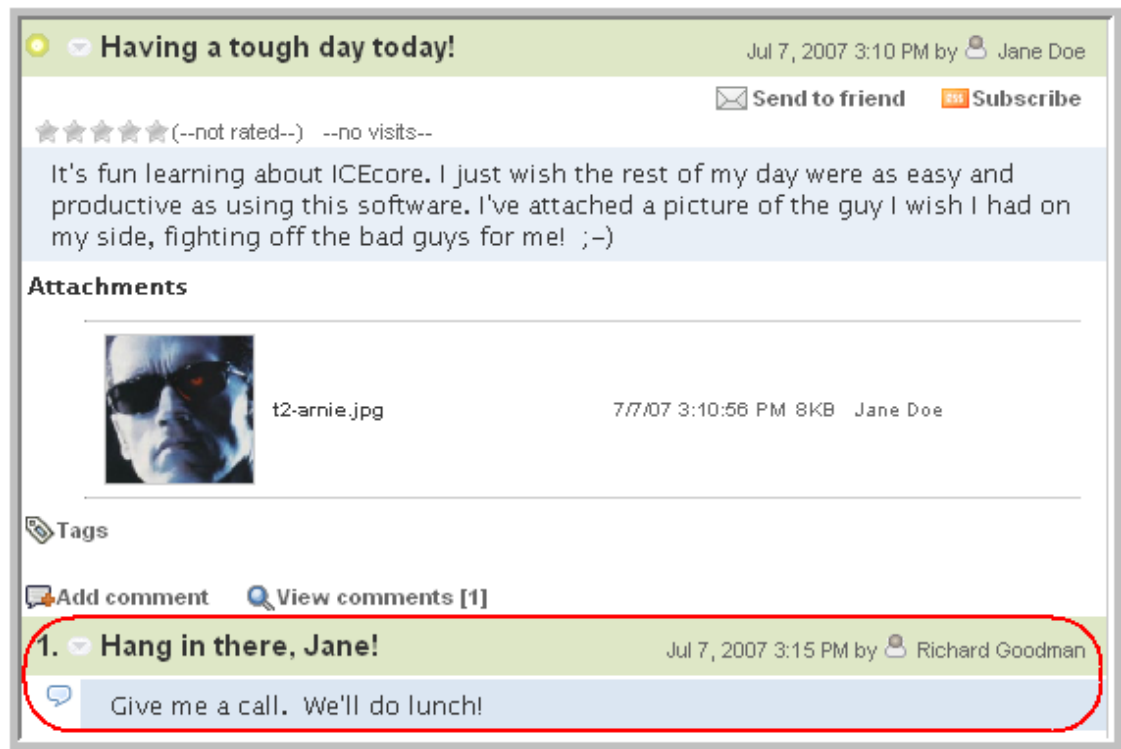
Collaborate in a Folder

The next section explains how to create a team workspace. Even though, by default, this process is very easy, you may want to use your personal workspace to learn ICEcore collaborative features before creating a team workspace. One way to do this is to create a folder and invite others to *participate* in the folder with you as teammates.

To create a team folder in your personal workspace:

1. View your personal workspace.

Notice that workspaces and tabs displayed in folders provide a navigation bar at the top. You can click the *My workspace icon* in that navigation bar:
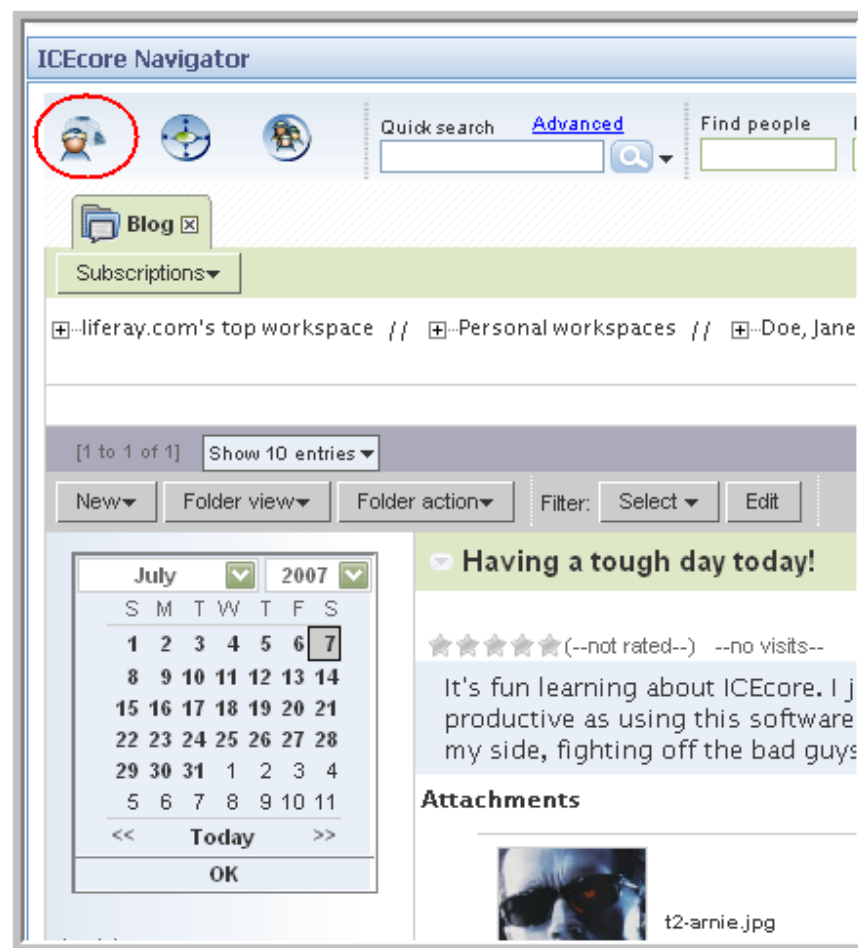
2. Click *Manage this workspace > Add new folder*:
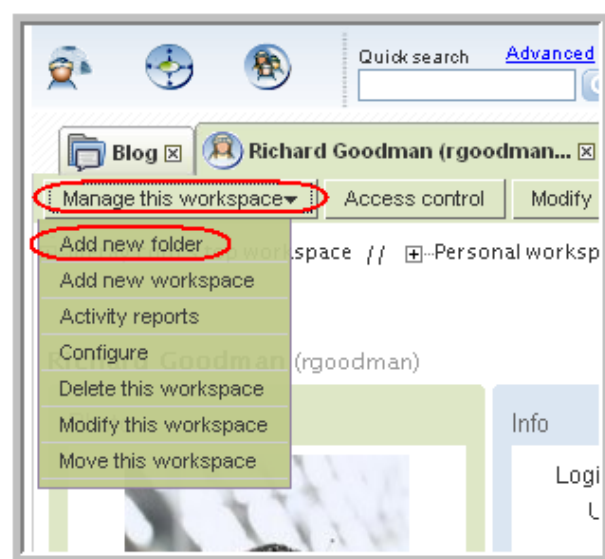
ICEcore displays a form that allows you to create a new folder.

3. Provide a title for your folder and select a type of folder (our example uses "Discussion").

4. Click *OK*.

Your new folder appears:

Notice in the previous picture that, when you move from one pace in ICEcore to another (for example, a newly created folder), the new place appears in a new tab. To return to what you had been doing (reading another teammate's blog), click the tab that goes to that place.

5. In the management-menu bar, click *Team > Add or delete team members*:
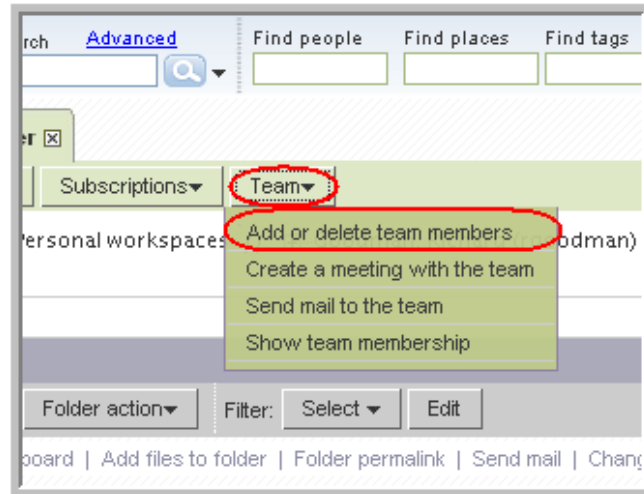
ICEcore displays a form that asks you if you want to explicitly specify your teammates. By default, many workspaces and folders *inherit* many configuration settings from their *parent* (the workspace or folder that contains it). Inheritance is helpful, because it makes may product features work automatically. In this case, however, you want to specify your own team.

6. Click *Yes*.

ICEcore displays form elements that allow you to specify your teammates for this folder.

7. Typing a few letters of either the first or last names of teammates:
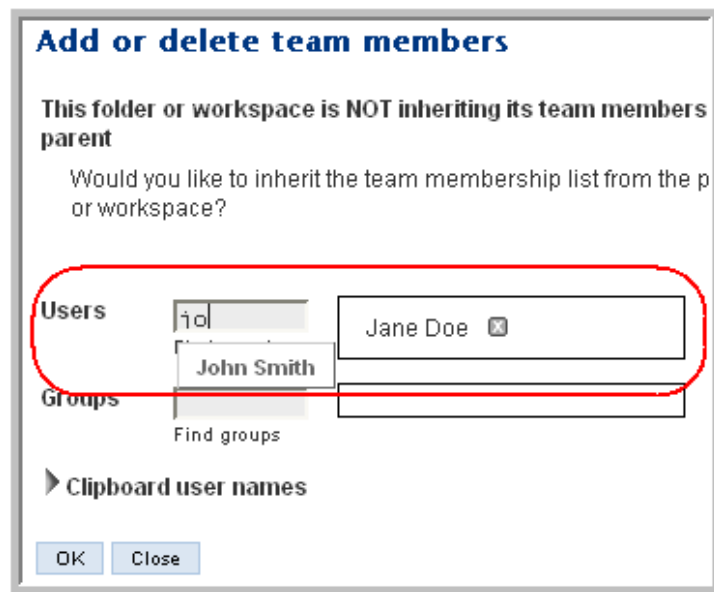
8. Click *OK*.

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 may take a more active role in the development of information in the folder. Following our example, when Rich Goodman returns to the "Widget Project Folder" in his personal workspace, a teammate may have authored an entry:
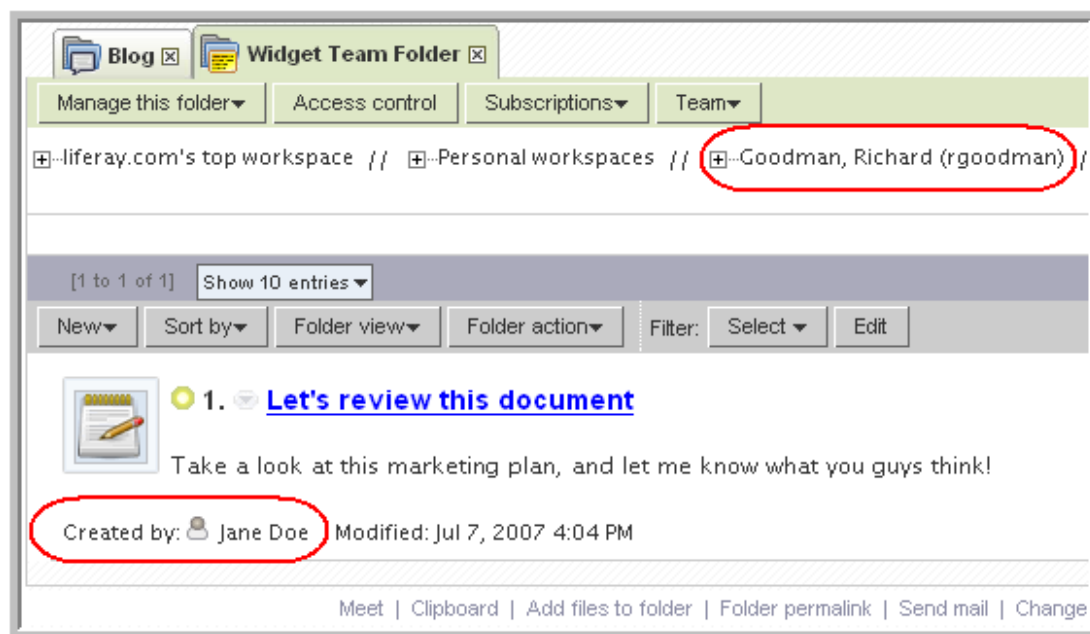
You can use team-oriented folders in your personal workspace until you feel more comfortable with the product features. Then, you can create a team workspace.

2.3 Create a Team Workspace

By default, anyone can create a team workspace (your site administrator informs 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:

-
-
-
-

2.3.1 Create the Workspace

1. From the portal page, in the workspace tree, click *Team workspaces*:
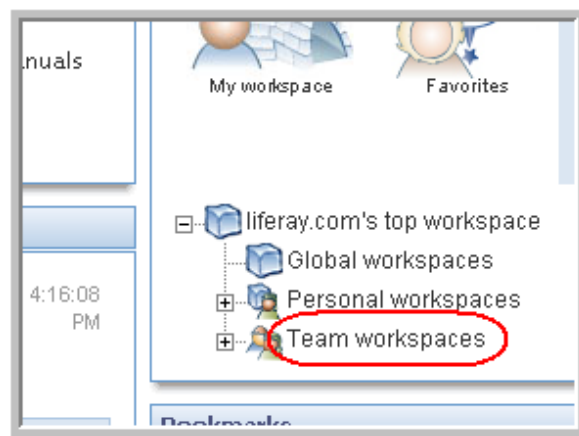
By default, all team workspaces are subworkspaces contained by "Team workspaces." Your site administrator may instruct you to go to a different workspace to create your team workspace. The remaining steps in the process are the same.

2. Click the *Add a team workspace* button:
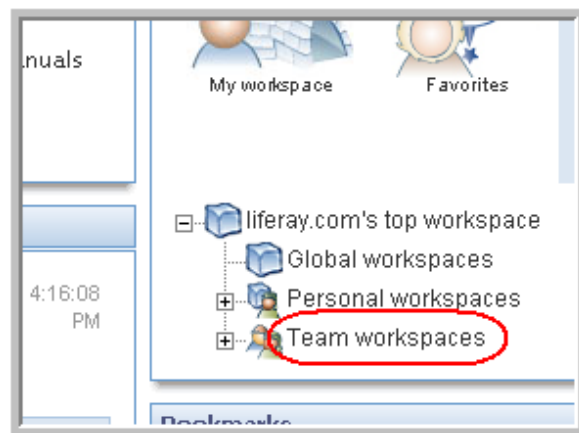
ICEcore displays a form used to create your team workspace.

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, click the check box next to the folders you want your team workspace to contain. (You can also add subworkspaces and folders later.)

6. If you choose, you can provide an announcement to be sent by e-mail to your team members, so that they know about the new team workspace.

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 (subworkspaces and folders), possibly adjusting access control (which determines who may 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 View Team Members

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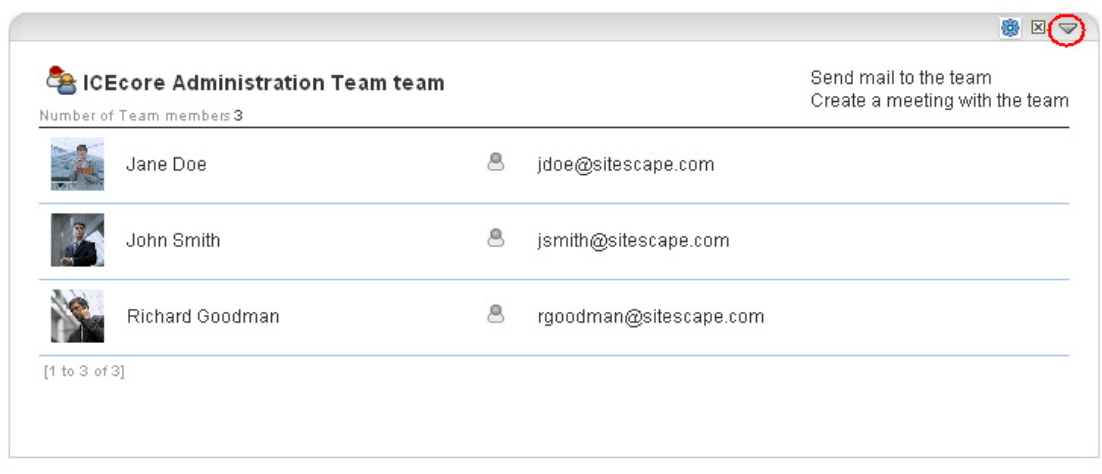
If this accessory is not present, do the following to view the team membership:

1. View your team workspace.

2. Click *Team > Show team membership*.

2.3.3 Communicate with Teammates

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

1. Click the *Team* button on the management-menu bar.

2. Click either *Create a meeting with the team* or *Send mail to the team*.

Teammates participate in meetings using their Zon clients.

2.3.4 Allow Visitors to Your Team Workspace

By default, only team members may view and participate in the workspaces and folders contained in the team workspace. There may 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. Navigate to your team workspace page.

   In addition to using the workspace tree, clicking plus signs (*X*) to open workspaces, you can use this tool to view your team workspace page quickly:
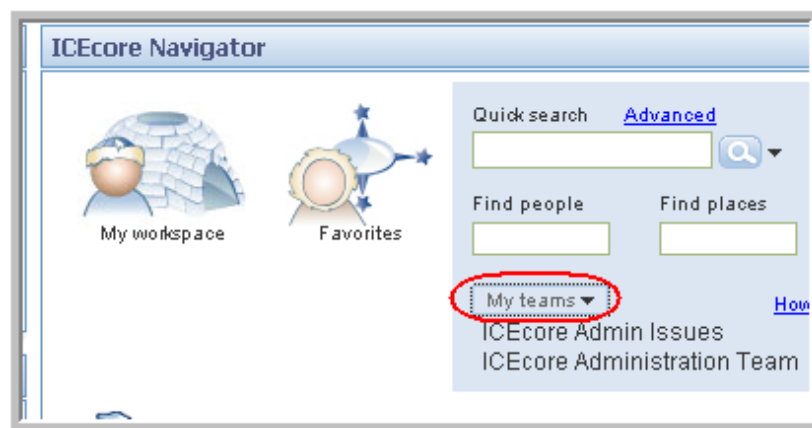
   Click *My teams* to display the list of teams of which you are a member. Click it again to collapse the list.

2. Click *Access control*:
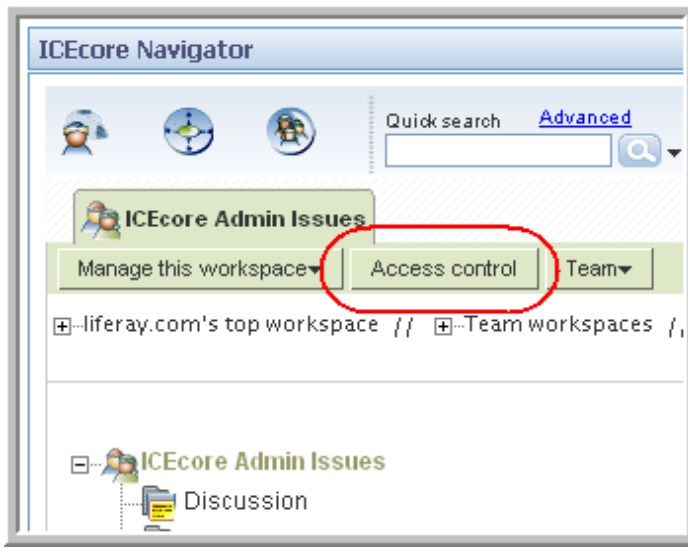
ICEcore displays the "Configure access control" page for the team workspace.

3. In the "This folder inherits..." section, click the *No* radio button, and click *Apply*:
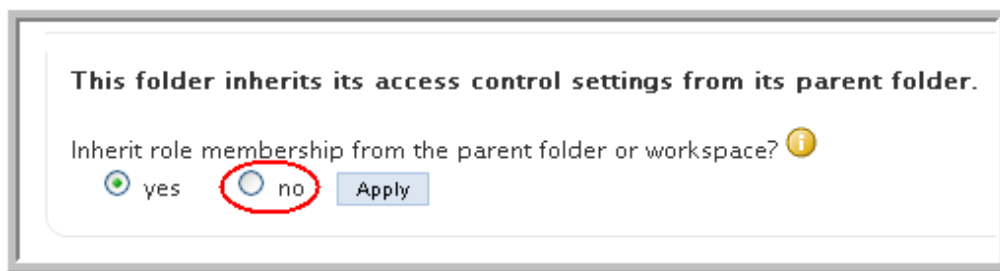
4. Click Add a user, and use the "type to find" feature to select a name:
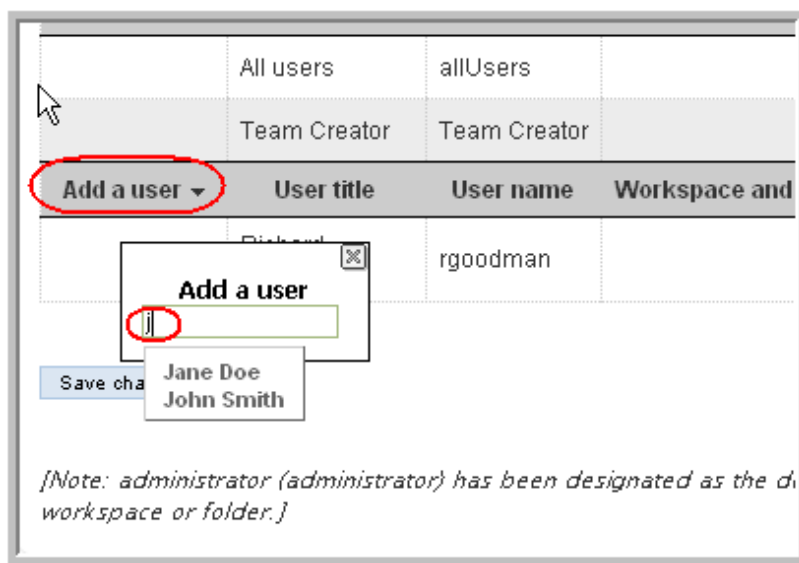
5. In that new user's row, click the check box in the Visitor column:

User title	User name	Workspace and folder administrator	Participant	Team member	Visitor
Jane Doe	jdoe	☐	☐	☐	☑

6. Repeat Steps 4 and 5 until you have added all your visitors.

7. Click *Save changes*.

8. Click *Close*.

Now those people have the right to view your team workspace and to add comments to existing entries. They cannot create new entries.

2.4 Use Advanced Search to Explore

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

1. From either the navigation portlet or the navigation bar, in the search section:

ICEcore Navigator

My workspace   Favorites

Quick search   Advanced

Find people   Find places

My teams ▼   How t

☐ liferay com's top workspace
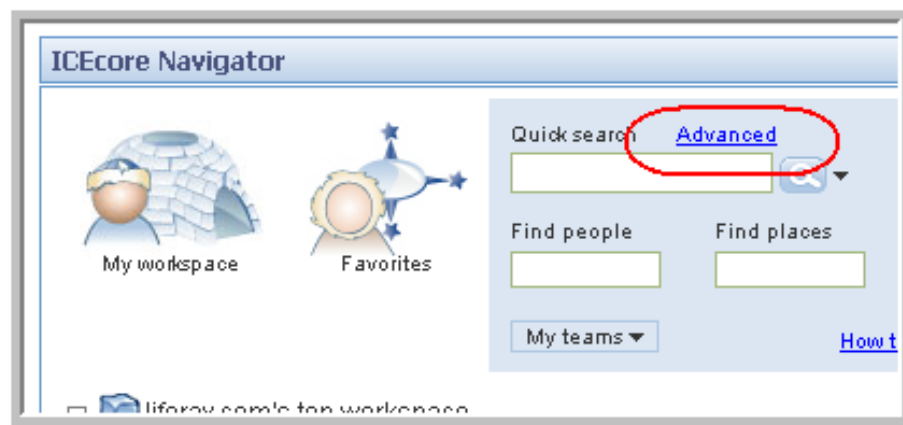
2. Type text that an item must contain, and check the box of one or more workspaces or folders in which to restrict the search:

3. Click *Search*.

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

2.5 Use the Workspace Tree to Explore

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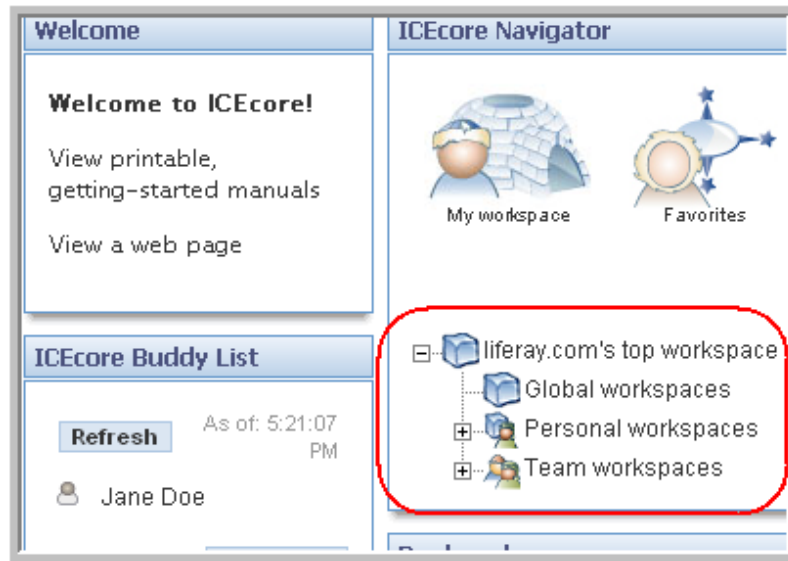
ICEcore Glossary

Items that 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 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 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 an item or restricting the search to a portion of the workspace tree).

alias
See e-mail alias.

attachment
A file attached to an entry.

author
The person who created an entry.

blog
A folder contain a chronological listing of journal entries.

blog archive
A feature of blog folders that allow 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. Later, 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 item content is presented. There are many types of configuration, ranging from setting allowable views for an item, selecting a color scheme, creating custom entries, and creating workflow processes.

default view

The configuration of the information you see when you first view a workspace or folder. Some items may 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 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, that determines its appearance and features.

form (a)

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

global workspace

 workspace that, by default, allows everyone to participate.

guestbook

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

help mode

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 Zon messaging software.

LifeRay (a)

The portal software within which ICEcore runs by default.

meeting

An online communication by teammates using the Zon messaging software. Zon 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 a task folder 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

The person who created the workspace, folder, or entry.

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.

permalink

A web address (URL) for an ICEcore workspace, folder, or entry that you can copy, paste, and send to a teammate so that they may access a page directly by specifying the address to their web browser.

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 homepage 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 application in sections of its page. For example, Google and Yahoo use portal pages. Sections within a portal page may display the local time, the local weather, your favorite stock quotes, and more.

portlet

A section on a portal page. ICEcore runs in portlets.

presence

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

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 anyplace in the ICEcore installation.

state

See workflow state.

subscription

A way to track new or changed items in ICEcore.

tag

A keyword that anyone 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 with 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 only 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 possibly more.

view

A presentation of an item's content. 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 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 may 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, subworkspaces, folders, and subfolders within ICEcore.