

User Guide

Kablink® Teaming

2.0

July 31, 2009

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About This Manual

The Kablink® Teaming 2.0 User Guide explains how to use the Teaming product.

This guide includes the following topics:

- ♦ Chapter 1, “Getting Started,” on page 13
- ♦ Chapter 2, “Getting Informed,” on page 27
- ♦ Chapter 3, “Navigating the Teaming Interface,” on page 41
- ♦ Chapter 4, “Managing and Using Workspaces,” on page 47
- ♦ Chapter 5, “Managing and Using Folders,” on page 59
- ♦ Chapter 6, “Working With Folder Entries,” on page 81
- ♦ Chapter 7, “Managing Accessories,” on page 95
- ♦ Chapter 8, “Connecting With Your Co-Workers,” on page 105
- ♦ Chapter 9, “Using Workflows,” on page 113
- ♦ Appendix A, “What’s New in Teaming 2.0,” on page 115
- ♦ Appendix B, “Troubleshooting,” on page 121
- ♦ Appendix C, “Accessibility for People with Disabilities,” on page 129

Audience

This guide is intended for all new Kablink Teaming users.

Feedback

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

Documentation Updates

For the most recent version of this manual, visit the [Kablink Teaming 2.0 Documentation Web site](http://www.novell.com/documentation/kablinkteaming2) (<http://www.novell.com/documentation/kablinkteaming2>).

Additional Documentation

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

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

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

Documentation 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.

Getting Started

1

When you begin to use Kablink® Teaming, the first thing you might want to do is set up your personal workspace and create a team workspace. This section explains how to get started with Teaming by accomplishing these important tasks.

- ♦ [Section 1.1, “About Kablink Teaming,” on page 13](#)
- ♦ [Section 1.2, “Watching the Teaming Video Tutorials,” on page 14](#)
- ♦ [Section 1.3, “Creating Your Own User Account,” on page 15](#)
- ♦ [Section 1.4, “Getting to Know the Kablink Teaming Interface and Its Features,” on page 16](#)
- ♦ [Section 1.5, “Setting Up Your Personal Workspace,” on page 19](#)
- ♦ [Section 1.6, “Creating a Team Workspace,” on page 20](#)
- ♦ [Section 1.7, “Using Kablink Teaming Folders,” on page 21](#)
- ♦ [Section 1.8, “Using Help Mode,” on page 23](#)

As you use this guide to help you accomplish tasks in Teaming, you might discover that you are unable to complete the tasks as the sections describe. If you encounter this problem, it is probably because you have not been granted appropriate rights. You should consult with your Teaming administrator.

For more information on rights and access control in Teaming, see “[Controlling User Access](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

1.1 About Kablink Teaming

- ♦ [Section 1.1.1, “Teaming Is Collaboration Software,” on page 13](#)
- ♦ [Section 1.1.2, “Teaming Is Social Networking Software,” on page 14](#)

1.1.1 Teaming Is Collaboration Software

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

You experience an increase in team synergy when using Teaming:

- ♦ You and your teammates can work together without being in the same room or working at your computers at the same time. Someone can post a note or document to a folder, and, at their convenience, teammates can comment on the work, review and edit files, and further develop the idea. With Teaming, teamwork is ongoing and potentially never-ending.
- ♦ When you are working online at the same time, the “presence” feature of Teaming allows you to see which teammates are currently online, and allows you to start a chat session by using Kablink Conferencing, create an online meeting using Conferencing, make a Skype® phone call, and so on.
- ♦ Ideas are formed together, interactively, with your teammates. By the time you hold a meeting in the conference room, the team has already been part of the formation of the idea, and teammates are more likely to understand it, buy into it, and assist with its implementation. Teaming becomes a “pre-meeting” meeting.

- ♦ Documents are reviewed earlier in the process, which allows for easier modifications and adjustments. Teaming also makes it easier to co-author documents, because of workflow processes that automate drafting and review, and because of Teaming access control that easily designates writers and reviewers.
- ♦ Your collaborative process is preserved and publicly accessible in Teaming. No more searching through e-mail folders in a frantic effort to “catch someone up” on a lengthy e-mail discussion. To review past discussions and decisions, or to review a previous version of a document, use the powerful search capability of Teaming to locate historical information quickly and easily.
- ♦ You can use various Teaming tools in combination—a milestones folder, tasks, workflow, discussions, chat, online meetings—to track progress against goals for multiple teams working on a large project.

1.1.2 Teaming Is Social Networking Software


The out-of-the-box Teaming tools provide powerful enhancements to online collaboration. In addition, when you use the tools in combination and apply structure to content design, Teaming becomes a powerful knowledge-management and enterprise social networking tool. Knowledge management involves the efficient development, management, access, and distribution of organizational knowledge. Enterprise social networking involves the efficient connection of knowledgeable people needed to form teams, make decisions, and complete work (like FaceBook* 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, Kablink Conferencing username, and so on). It enables searches for various subject-matter experts. Also, Teaming analyzes its search results, telling you which people discuss your search topic the most and in which places these conversations are happening. It is easy to see pockets of expertise associated with your area of interest.
- ♦ Experts can rate entries in Teaming by using a five-star rating system (one star indicating the least impressive, and five stars the most impressive), providing an additional tool for determining the quality of information.
- ♦ Teaming provides tools, such as wikis (information coauthored by all participants), blogs (chronological journal entries allowing for comments from readers), workflow (an online representation of a business process), and tags (categorical labels applied to items). People can use these tools to create and organize information organically, over time, in ways that map best to the team’s natural work style. Through these tools, teams literally move their business processes online and automate their work.
- ♦ Teaming provides work-area summaries, called accessories, that provide a snapshot of a potentially large amount of information, highlighting the most relevant data. For example, the accessory can present entries submitted by an expert on a given subject, or it can summarize task-completion information by providing a milestone overview.

1.2 Watching the Teaming Video Tutorials

Kablink Teaming 2.0 includes five video tutorials that are displayed in your personal workspace. These videos explain how to perform core tasks, and get you collaborating fast. It is a good idea to watch these video tutorials to help you get started with Teaming.

You can minimize the *Video Tutorials* section by clicking the *Minimize* icon , or you can delete the section by clicking the *Delete* icon (X).

After you have deleted the *Video Tutorials* section, you can launch it again:

- 1 In the main sidebar, click *Personal Preferences*.
- 2 In the *Video Tutorial Panel* section, click *Show panel*.

The *Video Tutorials* section is displayed.

You can also access the video tutorials from the following URLs:

- ♦ *What Is Teaming* (<http://www.brainstorminc.com/cbt/teaming/index.php?category=whatisteaming>)
- ♦ *Getting Started* (<http://www.brainstorminc.com/cbt/teaming/index.php?category=gettingstarted>)
- ♦ *Getting Informed* (<http://www.brainstorminc.com/cbt/teaming/index.php?category=gettinginformed>)
- ♦ *Navigation* (<http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation>)
- ♦ *Customizations* (<http://www.brainstorminc.com/cbt/teaming/index.php?category=customizations>)

1.3 Creating Your Own User Account

Kablink Teaming supports self-registration, so you can create your own user account if you do not already have one.

- 1 In the main login page, click *Create new account*.

The User page is launched.

- 2 Specify the following information:

User ID: The User ID that you use when you log in to Teaming.

New Password: The password that you use when you log in to Teaming.

Name: Specify your first, middle, and last name.

E-Mail Addresses: Specify the appropriate e-mail addresses.

Conferencing User Name: Specify your Conferencing username. This applies only if you are using Teaming in conjunction with Kablink Conferencing.

Phone: Specify your phone number.

Time Zone: Select the appropriate time zone from the drop-down list.

Picture: Browse to and select the picture that you want to use as your profile picture.

This picture is displayed in your personal workspace, as well as next to entries and comments that you make in Teaming.

Text Verification: In the provided field, type the characters that you see on the screen.

- 3 Click *OK*.

1.4 Getting to Know the Kablink Teaming Interface and Its Features

When you first launch Kablink Teaming, you see your personal workspace, which includes the following toolbars and features:

Figure 1-1 Teaming Interface



- ◆ Section 1.4.1, “Understanding the Navigation Toolbar,” on page 16
- ◆ Section 1.4.2, “Understanding the Main Sidebar,” on page 17
- ◆ Section 1.4.3, “Understanding the Workspace Toolbar,” on page 18
- ◆ Section 1.4.4, “Understanding the Folder Toolbar,” on page 18
- ◆ Section 1.4.5, “Understanding the Relevance Tabs in the Home Page of Your Personal Workspace,” on page 19

1.4.1 Understanding the Navigation Toolbar

The Navigation toolbar contains the following features:

Search: Enables you to search for entries, places, or people. Search functionality is helpful if you are looking for a subject-matter expert, or if you want to see what information is available concerning a particular topic.

For more information, see [Section 2.5, “Searching for Information,” on page 29](#).

Find: Enables you to locate people, places, and tags that you know exist on the Teaming site.

For more information, see [Section 3.2, “Finding Specific People, Places, or Tagged Items,” on page 41](#).

My Workspace: Click the *My Workspace* link to return to your personal workspace.

Favorites: Click the *Favorites* drop-down list to add a place as a favorite, or to quickly visit your favorite places on the Teaming site.

For more information, see [Section 3.5, “Using the Favorites Panel,” on page 42.](#)

My Teams: The *My Teams* drop-down list enables you to quickly navigate to all of the team workspaces where you are a member.

1.4.2 Understanding the Main Sidebar

The main sidebar contains the following features:

Micro-Blog: Enables you to capture quick thoughts and to inform others of what you are currently working on.

For more information, see [Section 2.10, “Using Micro-Blogs,” on page 34.](#)

Track This Person/Track This Workspace/Track This Folder: Enables you to track the person, workspace, or folder that you are currently viewing.

For more information, see [Section 2.6, “Tracking and Untracking Places and People of Interest,” on page 33.](#)

Share This Workspace/Share This Folder: Enables you to share the workspace or folder with another Teaming user.

For more information, see [Section 2.11, “Sharing Workspaces, Folders, and Entries,” on page 35.](#)

Recent Places: Displays the places that you have most recently visited.

For more information, see [Section 3.3, “Viewing and Revisiting Recent Places,” on page 42.](#)

Workspace: Displays the workspace that you are currently viewing, and all of the sub-workspaces and sub-folders.

Folder Options: Enables you to change the folder view and some other folder-specific options.

For more information on managing your folders, see [Chapter 5, “Managing and Using Folders,” on page 59.](#)

Team: Enables you to view team members, manage the team, and send them e-mail messages.

For more information on managing a team workspace, see [Section 4.3, “Managing a Team Workspace,” on page 53.](#)

Tag This Workspace/Tag This Folder: Enables you to create a personal or community tag on the workspace or folder that you are currently viewing.

For more information, see [Section 3.7, “Using Tags,” on page 43.](#)

Personal Preferences: Enables you to change various personal preferences, such as the way entries are displayed, the default document editor, and more.

Send E-Mail: Enables you to send an e-mail message from Teaming. By default, the message has a link to the page that you are currently viewing.

For more information, see [Section 8.3, “Sending E-Mail From within Teaming,” on page 107.](#)

Clipboard: Enables you to add people to the clipboard, so that you can have quick access to their names when necessary.

For more information, see [Section 8.5, “Using the Teaming Clipboard,” on page 109](#).

1.4.3 Understanding the Workspace Toolbar

The Workspace toolbar and the Folder toolbar occupy the same space in the Teaming interface. The Workspace toolbar is displayed when you are in a workspace, and the Folder toolbar is displayed when you are in an individual folder of that workspace.

The Workspace toolbar contains the following features:

What’s Unread: Displays all of the entries contained in the workspace that you have not yet read.

What’s New: Displays all of the entries contained in the workspace that are new.

Manage: Provides various functions that enable you to manage the workspace, including adding new folders, managing access control, configuring the workspace, and more.

For more information on how to manage a workspace, see [Section 4.1, “General Workspace Management,” on page 47](#).

Who Has Access: Displays who has rights to access the workspace.

Modify Profile: Enables you to modify your personal profile information, such as e-mail address, phone number, and picture.

For more information, see [Section 1.5.1, “Modifying Your Profile,” on page 19](#).

1.4.4 Understanding the Folder Toolbar

The Workspace toolbar and the Folder toolbar occupy the same space in the Teaming interface. The Workspace toolbar is displayed when you are in a workspace, and the Folder toolbar is displayed when you are in an individual folder of that workspace.

The Folder toolbar contains the following features:

What’s Unread: Displays all of the entries contained in the folder that you have not yet read.

What’s New: Displays all of the entries contained in the folder that are new.

Manage: Provides various functions that enable you to manage the folder, including adding new folders, managing access control, configuring the folder, and more.

For more information on how to manage a folder, see [Section 5.1, “General Folder Management,” on page 59](#).

Who Has Access: Displays who has rights to access the folder.

E-Mail Notification: Enables you to subscribe to the folder. When you subscribe to a folder, Teaming notifies you via e-mail of the activity that takes place in the folder.

For more information on subscribing to e-mail notifications, see [Section 2.12, “Subscribing to a Folder or Entry,” on page 36](#).

1.4.5 Understanding the Relevance Tabs in the Home Page of Your Personal Workspace

The home page of your personal workspace contains various tabs that are designed to help facilitate your work. Use these tabs as a central location where you can quickly get informed on new entries, upcoming tasks, your daily meetings, and more.

Overview: Contains an Accessory Panel that lists entries from your Guestbook, Blog, and Photo Album folders.

What's New (Teams, Tracked Places, Site): Enables you to quickly see new entries in your teams, tracked places, or across the entire site.

Tasks and Calendars: Enables you to view tasks that are assigned to you, as well as today's events from your tracked calendars.

Recent Entries: Enables you to view entries that you have recently posted, and entries that you have recently visited.

Micro-Blogs and Shared Items: Enables you to view the micro-blog entries of the people you are tracking, as well as items that people have shared with you.

Profile: Displays your personal profile information. Click *Modify Profile* in the Workspace toolbar to change and add information.

1.5 Setting Up Your Personal Workspace

Before you take advantage of all of the features and functionality of Kablink Teaming, you might want to customize your personal workspace.

- ♦ [Section 1.5.1, “Modifying Your Profile,” on page 19](#)
- ♦ [Section 1.5.2, “Presenting Your Professional Credentials,” on page 20](#)

1.5.1 Modifying Your Profile

You might need to manually update your profile in order for important contact information to be seen, such as your e-mail address, phone number, time zone, and picture.

- 1 In the home page of your personal workspace, click the *Profile* tab.
If you are a new user, your profile does not currently contain much information.
- 2 Click *Modify Profile* in the Workspace toolbar.
The User page is launched.
- 3 Change your password, e-mail address, phone number, time zone, language of the interface, upload a picture, and more.
- 4 When you are finished modifying your profile, click *OK*.

1.5.2 Presenting Your Professional Credentials

One advantage of Teaming is the ability to find experts on any particular subject within your organization. You, as a Teaming user, have the ability to be a subject-matter expert. If you want people to know what skills and past experience you have, you can post that information in a Blog entry in your personal workspace.

- 1 Select the Blog folder in your personal workspace.

- 2 Click *Add Blog Entry*.

The Blog Entry page is displayed.

- 3 Specify the following information:

Title: Provide a title for the blog entry, such as *My Skills and Experience*.

Description: You can paste pertinent sections of your resume, or you can simply type the information directly into the field.

Attachments: You can attach your entire resume, or any other files that you think might help other users understand your professional strengths.

- 4 Click *OK*.

You have now created a blog entry to inform other Teaming users about your skills and professional experience.

1.6 Creating a Team Workspace

By default, everyone in Kablink Teaming has rights to create a team workspace.

Team workspaces are the most common type of workspaces. They facilitate team objectives by enabling team members to quickly share files, share ideas, and work together more efficiently and effectively.

To create a team workspace:

- 1 Expand *Home Workspace* in the Workspace tree, located near the top of the Teaming interface.

The Home Workspace directory is the highest-level folder in the workspace tree, and might be named something specific to your organization.

- 2 Click *Team Workspaces*.

- 3 Click *Add a team workspace*.

The Add a Team Workspace page is displayed.

If you do not see this option, your site administrator has not permitted you to create a new workspace at this level. Continue to expand the workspace tree, following the path of your organizational unit, then click the name of the directory where you want to create the new team workspace. Or, follow the steps in [“Creating a Team Workspace inside of an Existing Team Workspace” on page 55](#).

- 4 Specify the following information:

Title: Provide a title for the workspace.

Team Members: Specify the team members.

You can specify individual users, entire groups, or add names that are on your clipboard. For more information about using the Teaming clipboard, see [Section 8.5, “Using the Teaming Clipboard,” on page 109](#).

Workspace Folders: Select the folders that you want the workspace to contain.

If you later decide that you want to add additional folders, you can add them at any time. For information on how to add folders to a workspace, see [Section 5.1.1, “Creating a New Folder,” on page 59](#).

Announcement: (Optional) Select the check box, then type a message in the *Announcement Text* field.

This message informs team members about the existence of the workspace, and can also explain the value of the workspace.

5 Click *OK* to create the new workspace.

For information on how to create a team workspace inside of an existing workspace, see [“Creating a Team Workspace inside of an Existing Team Workspace” on page 55](#).

1.7 Using Kablink Teaming Folders

Kablink Teaming includes multiple types of folders that enable you to organize the various kinds of information in your workspaces.

- ♦ [Section 1.7.1, “Discussion,” on page 21](#)
- ♦ [Section 1.7.2, “Blog,” on page 22](#)
- ♦ [Section 1.7.3, “Calendar,” on page 22](#)
- ♦ [Section 1.7.4, “Guestbook,” on page 22](#)
- ♦ [Section 1.7.5, “File,” on page 22](#)
- ♦ [Section 1.7.6, “Milestone,” on page 22](#)
- ♦ [Section 1.7.7, “Micro-Blog,” on page 22](#)
- ♦ [Section 1.7.8, “Photo Album,” on page 23](#)
- ♦ [Section 1.7.9, “Survey,” on page 23](#)
- ♦ [Section 1.7.10, “Task,” on page 23](#)
- ♦ [Section 1.7.11, “Wiki,” on page 23](#)

For more detailed information about each type of Teaming folder, see [Section 5.3, “Choosing a Folder Type,” on page 66](#).

1.7.1 Discussion

Use discussions as a way of obtaining comments and feedback to questions and thoughts that you might have. You can start general discussion threads in the Discussion folder in your personal workspace. For discussion threads that are more specific to a project and team, start the discussion thread in the Discussion folder of an appropriate team workspace.

For more information on Discussion folders, see [Section 5.3.1, “Discussion,” on page 67](#).

1.7.2 Blog

Blogs are a good way to express your thoughts about topics that are important to you. For example, if you are working on a project and are responsible for a certain aspect of that project, you can update your team on your individual progress by posting a blog in the Blog folder in the team workspace. Also, you can use the Blog folder in your personal workspace to post your professional credentials and skills, as described in [Section 1.5.2, “Presenting Your Professional Credentials,” on page 20](#).

For more information on Blog folders, see [Section 5.3.2, “Blog,” on page 68](#).

1.7.3 Calendar

Teaming enables you to create a Calendar folder in any workspace that you desire. You can maintain a personal calendar in your personal workspace, and then add separate calendars in your team workspaces to keep track of events that are specific to that team.

For more information on Calendar folders, see [Section 5.3.3, “Calendar,” on page 69](#).

1.7.4 Guestbook

The Guestbook folder in Teaming is a place to store all of your guestbook entries. By default, users can sign your Guestbook by clicking the *Overview* tab on the home page of your personal workspace. This is a quick way for your friends and co-workers to communicate with you.

For more information on Guestbook folders, see [Section 5.3.4, “Guestbook,” on page 71](#).

1.7.5 File

File folders in Teaming make it easy to store and keep track of your files. You can store personal files in the File folder in your personal workspace, and team-related files in your individual team folders. This makes it easy to share files with your teammates and others who might be interested in viewing them.

For more information on File folders, see [Section 5.3.5, “File,” on page 71](#).

1.7.6 Milestone

Milestone folders track 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. For more information, see [Section 4.5, “Managing a Project Management Workspace,” on page 58](#).

For more information on Milestone folders, see [Section 5.3.6, “Milestone,” on page 72](#).

1.7.7 Micro-Blog

The Micro-Blog folder in Teaming is a place to store all of your micro-blog entries. Use the Micro-Blog feature to capture quick personal notes, or to inform others of what you are currently working on. This provides a greater transparency, so those you work with know what you are doing, and how they might offer assistance to help you accomplish your tasks.

You can navigate to someone else's Micro-Blog folder to see what they have been working on, and possibly provide help by sharing your knowledge and experience.

For more information on the Micro-Blog feature, see [Section 2.10, “Using Micro-Blogs,” on page 34](#).

1.7.8 Photo Album

Photo albums store and display pictures. You can store your personal photos in the Photo Album in your personal workspace, and team-related photos in the Photo Album of the team workspace.

For more information on Photo Album folders, see [Section 5.3.8, “Photo Album,” on page 73](#).

1.7.9 Survey

Survey folders store surveys that you or other Teaming users have created. Surveys enable you to poll team members, or any other Teaming users, about issues that are important to you, your team, or your company.

For more information on Survey folders, see [Section 5.3.9, “Survey,” on page 75](#).

1.7.10 Task

Task folders keep track of the progress made in completing work assignments. Teaming enables you to create a Task folder in any workspace that you desire. You can maintain a personal Task folder in your personal workspace, and then add separate Task folders in your team workspaces to keep track of tasks that are specific to that team.

For more information on Task folders, see [Section 5.3.10, “Task,” on page 76](#).

1.7.11 Wiki

Wiki folders contain wiki entries. A wiki is a set of related entries coauthored by folder participants. For example, the best known wiki on the Internet is Wikipedia*. Other examples of possible wiki content are glossaries, or policies and procedures.


For more information on Wiki folders, see [Section 5.3.11, “Wiki,” on page 78](#).

1.8 Using Help Mode


Kablink Teaming has a unique way of helping you to learn about product pages and tools.

- ♦ [Section 1.8.1, “Launching Help Mode,” on page 24](#)
- ♦ [Section 1.8.2, “Getting Help about a Topic,” on page 24](#)
- ♦ [Section 1.8.3, “Using the Help Mode Control Panel,” on page 24](#)
- ♦ [Section 1.8.4, “Viewing the Manuals,” on page 24](#)
- ♦ [Section 1.8.5, “Exiting Help Mode,” on page 25](#)

1.8.1 Launching Help Mode

- 1 Click the Teaming *Help* icon , which is located on all workspaces, folders, and entry pages.
When you click this icon, Teaming enters Help mode.

1.8.2 Getting Help about a Topic

When you enter Help mode, Teaming dims the page, displays the Help mode control panel, and presents information icons  next to each section of that page for which there is Help information:

- 1 Click the information icon over the portion of the page about which you want more information.
Teaming displays a panel of information about the particular topic.
- 2 When you are finished reading the panel, click the *Close* icon (*X*) in the upper right corner of the panel to close it.
or
Click another information icon to read about another topic.

1.8.3 Using the Help Mode Control Panel

Teaming enables you to minimize and maximize the Help mode control panel.

- ♦ [“Minimizing the Help Mode Control Panel” on page 24](#)
- ♦ [“Maximizing the Help Mode Control Panel” on page 24](#)

Minimizing the Help Mode Control Panel

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.

- 1 Click the *Currently displayed* (down-arrow) icon.

Maximizing the Help Mode Control Panel

You can display the contents of the control panel after you have minimized it.

- 1 Click the *Currently hidden* (right-arrow) icon.

1.8.4 Viewing the Manuals

To view manuals from the Help mode control panel:

- 1 Click *View manuals* in the control panel.
- 2 Click *All Teaming Users* for end user documentation, or click *Teaming Administrators* for administrator documentation.
- 3 Click the linked title of the manual that you want to view.

1.8.5 Exiting Help Mode

- 1 Click the *Close* icon (*X*) in the Help mode control panel.
or
Click any dimmed part of the page.

Kablink® Teaming provides numerous methods to help keep you informed of what's going on in your teams and in your organization.

- ♦ [Section 2.1, “Accessing Kablink Teaming from Your Mobile Phone,” on page 27](#)
- ♦ [Section 2.2, “Finding What's New,” on page 27](#)
- ♦ [Section 2.3, “Finding What's Most Popular In Your Teaming Site,” on page 28](#)
- ♦ [Section 2.4, “Finding What's Unread,” on page 28](#)
- ♦ [Section 2.5, “Searching for Information,” on page 29](#)
- ♦ [Section 2.6, “Tracking and Untracking Places and People of Interest,” on page 33](#)
- ♦ [Section 2.7, “Viewing Recent Contributions,” on page 34](#)
- ♦ [Section 2.8, “Viewing Tasks,” on page 34](#)
- ♦ [Section 2.9, “Viewing Calendar Events,” on page 34](#)
- ♦ [Section 2.10, “Using Micro-Blogs,” on page 34](#)
- ♦ [Section 2.11, “Sharing Workspaces, Folders, and Entries,” on page 35](#)
- ♦ [Section 2.12, “Subscribing to a Folder or Entry,” on page 36](#)
- ♦ [Section 2.13, “Using Remote Applications,” on page 39](#)
- ♦ [Section 2.14, “Viewing Teaming Folders as RSS Feeds,” on page 39](#)
- ♦ [Section 2.15, “Synchronizing Teaming Task and Calendar Folders to a Desktop Calendar Application,” on page 39](#)

2.1 Accessing Kablink Teaming from Your Mobile Phone

Kablink Teaming includes a mobile interface that enables you to access your Teaming site from your iPhone*, Blackberry*, and any WAP phone that supports Web 2.0 access. In other words, most phones that have a data service plan can access the Teaming mobile interface.

- 1 Connect to the Internet from your mobile phone.
- 2 Specify the following URL: `http://host:port/mobile`.
- 3 Log in to Teaming, using your login credentials.

2.2 Finding What's New

One key to effective and efficient teamwork is knowing what people are working on and what they are saying. Kablink Teaming enables you to view the newest files and entries, wikis, discussions, and more. This enables you to quickly learn about the latest issues. You can also use Teaming as a way to keep track of what you've been working on.

Before you begin using Teaming What's New functionality, you might want to view the short tutorial video, [Finding What's New](http://www.brainstorminc.com/cbt/teaming/index.php?category=gettinginformed) (<http://www.brainstorminc.com/cbt/teaming/index.php?category=gettinginformed>). To display the video, follow this link, then click *Finding What's New*.

- ♦ [Section 2.2.1, “Finding What's New in a Workspace or Folder,” on page 28](#)
- ♦ [Section 2.2.2, “Finding What's New in Your Teams, Tracked Places, or Across the Entire Site,” on page 28](#)

2.2.1 Finding What's New in a Workspace or Folder

To view newly created items in a specific workspace or folder:

- 1 Navigate to the workspace or folder where you want to view the new postings.
- 2 Clicks *What's New* in the Workspace of Folder toolbar.
Teaming displays the most recent entries.

2.2.2 Finding What's New in Your Teams, Tracked Places, or Across the Entire Site

- 1 Navigate to your personal workspace by clicking *My Workspace* in the Navigation toolbar.
- 2 Click the *What's New* tab in the home page of your personal workspace.
- 3 Select *My Teams*, *Tracked Places*, or *Site Wide*.
In the left column of the page, Teaming displays the most recent entries.

2.3 Finding What's Most Popular In Your Teaming Site

Kablink Teaming enables you to view the most popular entries in your Teaming site.

- 1 Navigate to your personal workspace by clicking *My Workspace* in the Navigation toolbar.
- 2 Click the *What's New* tab in the home page of your personal workspace.
- 3 Select *Site Wide*.
In the right column of the page, Teaming displays the most popular entries.

2.4 Finding What's Unread

Kablink Teaming enables you to view unread items in any workspace or folder.

- 1 Navigate to the workspace or folder where you want to view all unread items.
- 2 Click *What's Unread* in the Workspace toolbar or Folder toolbar.
Teaming displays all of the items that you have not yet read.

Click the *Mark These Read* button to mark all unread items as read. These items no longer appear when you click *What's Unread* in this workspace or folder.

2.5 Searching for Information

Search functionality in Kablink Teaming enables you to search for entries, places, or people. Search functionality is helpful if you are looking for a subject-matter expert, or if you want to see what information is available about a particular topic.

If you want to quickly navigate to a personal workspace, team workspace, or folder that you know exists on the Teaming site, use Teaming **Find** functionality.

Before you begin using Teaming Search functionality, you might want to view the short tutorial video, [Using Search \(http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation\)](http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation). To display the video, follow this link, then click *Using Search*.

The following topics describe Search functionality:

- ♦ [Section 2.5.1, “Using Basic Search,” on page 29](#)
- ♦ [Section 2.5.2, “Using Advanced Search,” on page 30](#)
- ♦ [Section 2.5.3, “Saving and Reusing Searches,” on page 31](#)
- ♦ [Section 2.5.4, “Using the Search Results Page,” on page 31](#)
- ♦ [Section 2.5.5, “Search String Rules,” on page 32](#)


2.5.1 Using Basic Search

When you perform a basic search, your search is case-insensitive. If you want to make your search case-sensitive, perform an **advanced search**.

- ♦ [“Performing a Basic Search” on page 29](#)
- ♦ [“Using Wildcards in Your Search” on page 29](#)

Performing a Basic Search

To perform a basic search:

- 1 Type the words or quoted phrases into the *Search* field, then either press Enter on your keyboard, or click the *Search* icon .

Using Wildcards in Your Search

When performing a search, Teaming supports the following wildcards:

Asterisk (*): You can insert an asterisk (*) after word fragments if you want Teaming to search for words that begin with what you typed; however, Teaming does not support putting an asterisk before word fragments.

For example, if you are searching for words that begin with “work,” such as “workspace” and “workshop,” you can type `work*` and Teaming returns all instances of words beginning with “work.” However, if you type `*space`, Teaming does not search for words ending in “space,” such as “workspace.”

Question Mark (?): You can insert a question mark (?) to replace any single character in your search.

For example, you can type `t??e`, and Teaming returns all results containing the words “true,” “tree,” and so forth.

You cannot use a question mark as the first character in a search.

2.5.2 Using Advanced Search

Advanced Search enables you to narrow your search based on any or all of the following criteria:

Text: Enter the specific text that you are searching for.

Places: This section enables you to restrict your search to a particular place. Expand the tree by clicking the plus sign (+) next to the Home Workspace, then navigate to and select the workspace or folder that you want to search.

If you want Teaming to search every place below your selection in the Workspace tree, select *Search All Sub Places*.

Case Sensitive: Select this check box to make the text that you enter in the *Text* field case sensitive. For example, “tree” does not match “Tree,” “TREE,” and so on.

Presentation Options: Select how many results you want to display on each Search Results page, and how many words are displayed for each result.

Authors: Search for items based on the author.

Tags: Search for items that are tagged, whether they are community or personal tags. For more information on tags, see [Section 3.7, “Using Tags,” on page 43](#).

Workflow: Search for items that have a particular workflow applied to them.

Entry Attributes: Select the type of entry you are searching for, such as a blog entry, calendar entry, or comment.

Last Activity in Days: Select to search for items that have been active in the last 1, 3, 7, 30, or 90 days.

Creation Dates: Search for items based on when the items were created. In the fields provided, specify the start and end dates of the desired interval.

Modification Dates: Search for items based on when the items were last modified. In the fields provided, specify the start and end dates of the desired interval.

Item Type: Select the type of item you are searching for.

The following sections provide further information for using Advanced Search:

- ♦ [“Adding Criteria” on page 30](#)
- ♦ [“Accessing Advanced Search” on page 31](#)

Adding Criteria

If your search requires more than one criterion, click *Add Another* and Teaming provides another field for your use.

Click the X icon next to a criterion to remove it from the search.

Accessing Advanced Search

You can access the Advanced Search from either the navigation bar or from a search results page:

- ♦ “Navigation Bar” on page 31
- ♦ “Search Results Page” on page 31

Navigation Bar

- 1 Click *Advanced*. (Located above the *Search* field.)

Search Results Page

- 1 Click *Advanced*.
- 2 If you want to provide more than the initially provided criteria, click *Revise your Advanced Search query* in the *Summary of search criteria* section.

2.5.3 Saving and Reusing Searches

Teaming enables you to save searches, so you can reuse them in the future.

- ♦ “Saving Your Search” on page 31
- ♦ “Accessing Saved Searches” on page 31

Saving Your Search

To save a search for later use:

- 1 After you have performed a search that you want to save, provide a name in the *Saved searches* section of the main sidebar, on the left side of the page.
- 2 Click *Save*.

Accessing Saved Searches

- 1 Click the drop-down arrow next to the *Search* icon.
Links to saved searches are displayed.

2.5.4 Using the Search Results Page

When the search finishes, the Search Results page is displayed. In the main section of this page, Teaming lists all of the results for your search. Also, Teaming provides tools in the main sidebar, and displays search criteria at the top of the right column, as described in the following sections:

- ♦ “Search Results” on page 32
- ♦ “Tools” on page 32
- ♦ “Quick Search” on page 32

Search Results

In the main section of the right column, Teaming displays the results of your search. To view a result, click the name of the result. Results can be attachments, comments, or any type of Teaming entry.

Tools

The main sidebar provides the following tools to help make your search more efficient:

Recent Places: As you conduct searches, Teaming places links to each search in the Recent Places section of the main sidebar, so you can easily perform a recent search again. However, because Teaming saves only the most recently visited places and searches, use *Saved searches* for searches that you want to keep available.

Saved Searches: Provide a name for your current search and click *Save*. Later, in the navigation bar, you can click the drop-down arrow next to the *Search* icon and click the linked name of a saved search you want to perform again.

Top Ranked Places: Lists the places where your search topic is most often being discussed. Items at the top of the list being most relevant.

Top Ranked People: Lists the people who are most often contributing to the discussions about the topic for which you searched. Items at the top of the list are most relevant.

Tags: Shows tags that have been applied to matched items.

Quick Search

If your initial search did not yield the desired results, the *Quick search* section enables you to perform another search. Specify the topic to search for in the *Text* field, then click *Search*.

If you want to perform a more in-depth search, click *Advanced*.

2.5.5 Search String Rules

The rules for search strings are as follows:

Case Sensitivity: All basic searches in Teaming are case in-sensitive. For example, “tree” matches “tree,” “Tree,” “TReE,” and so on. If you want to make your search case sensitive, then you must perform an advanced search. For information on how to access Advanced Search, see “*Accessing Advanced Search*” on page 31.

More Than One Word: Teaming returns items that contain all words in the search string.

Quoted Phrase: Teaming returns items that match all words in order. Case sensitivity rules apply as described previously.

Exclusions: To exclude a word (do not return matches for items that contain this word), place a minus sign (-) in front of it. For example, “-tree” excludes all items containing “tree”, “Tree”, “TREE”, and so on.

2.6 Tracking and Untracking Places and People of Interest

Kablink Teaming enables you to track workspaces, folders, or people. When you track something or someone in Teaming, you can easily see activity generated in the specific place that you are tracking, or by the specific person that you are tracking.

Before you begin using the tracking capabilities in Teaming, you might want to view the short tutorial video, [Tracking People, Places, and Projects](http://www.brainstorminc.com/cbt/teaming/index.php?category=gettinginformed) (<http://www.brainstorminc.com/cbt/teaming/index.php?category=gettinginformed>). To display the video, follow the link, then click *Tracking People, Places, and Projects*.

- ♦ [Section 2.6.1, “Configuring Teaming to Track Workspaces, Folders, and People,” on page 33](#)
- ♦ [Section 2.6.2, “Viewing Your Tracked Workspaces, Folders, and People of Interest,” on page 33](#)
- ♦ [Section 2.6.3, “Untracking Workspaces, Folders, or People,” on page 33](#)

2.6.1 Configuring Teaming to Track Workspaces, Folders, and People

- 1 Navigate to the workspace or folder that you want to track. If you want to track a person, navigate to that person’s personal workspace.
- 2 In the main sidebar, click *Track This Workspace*, *Track This Folder*, or *Track This Person*.

2.6.2 Viewing Your Tracked Workspaces, Folders, and People of Interest

If you are currently tracking a workspace, folder, or person, Teaming enables you to easily see activity generated in the specific place that you are tracking, or by the specific person that you are tracking.

- 1 Navigate to your personal workspace.
- 2 Click the *What’s New* tab.
- 3 Select *Tracked Places*.

Teaming lists all of the new entries that have been posted to the folders that you are tracking, and lists the entries that have been contributed by the people you are tracking.

2.6.3 Untracking Workspaces, Folders, or People

If you are currently tracking someone or some place in Teaming, it is easy to untrack that person or place.

- 1 Navigate to your personal workspace.
- 2 Click the *What’s New* tab.
- 3 Select *Tracked Places*.
- 4 On the right hand side of the page, click the (X) next to the tracked people or tracked places that you want to untrack.

2.7 Viewing Recent Contributions

Kablink Teaming enables you to quickly revisit entries that you either recently posted, or recently visited.

- 1 Navigate to your personal workspace.
- 2 Click the *Recent Entries* tab.

The left column lists all of the entries that you have most recently posted. The right column lists all of the entries that you have most recently visited.

To view a demonstration of how this is done, see [Checking Recent Entries \(http://www.brainstorminc.com/cbt/teaming/index.php?category=gettinginformed\)](http://www.brainstorminc.com/cbt/teaming/index.php?category=gettinginformed). To display the video, follow this link, then click *Checking Recent Entries*.

2.8 Viewing Tasks

To help you keep track of tasks that have been assigned to you, Kablink Teaming provides a quick, easy way to view tasks.

- 1 Navigate to the home page of your personal workspace.
- 2 Click the *Tasks and Calendars* tab.

In the left column, Teaming displays the tasks that are assigned to you. You can sort them by tasks due within two weeks, or any tasks that are currently assigned to you.

2.9 Viewing Calendar Events

To help you keep track of your calendar events, Kablink Teaming enables you to view all of the calendar events for which you are scheduled on the current day.

- 1 Navigate to the home page of your personal workspace.
- 2 Click the *Tasks and Calendars* tab.

The right section of the page displays today's schedule with all of the calendar events from all of your tracked calendars.

2.10 Using Micro-Blogs

Use the Micro-Blog feature to capture quick personal notes, or to inform others of what you are currently working on. This provides a greater transparency, so those you work with know what you are doing, and how they might offer assistance to help you accomplish your tasks.

Micro-Blogs differ from regular blogs in that their purpose is not to present an entire topic or argument, but rather to give a quick snippet of information about the author of the Micro-Blog. Micro-Blogs should be only one or two short sentences.

For more information on traditional blogs within Teaming, see [Section 5.3.2, "Blog," on page 68](#).

- ♦ [Section 2.10.1, "Posting a Micro-Blog," on page 35](#)
- ♦ [Section 2.10.2, "Viewing the Micro-Blog Entries of Other Kablink Teaming Users," on page 35](#)

2.10.1 Posting a Micro-Blog

You can post a Micro-Blog from anywhere within Kablink Teaming.

- 1 In the main sidebar, compose your Micro-Blog in the *Micro-Blog* field.
- 2 Click *OK*.

2.10.2 Viewing the Micro-Blog Entries of Other Kablink Teaming Users

- ♦ “Viewing the Micro-Blog Entries of People You Are Tracking” on page 35
- ♦ “Viewing a User’s Micro-Blog Entries by Using the Presence Icon” on page 35
- ♦ “Viewing a User’s Micro-Blog Entries by Navigating to His or Her Personal Workspace” on page 35

Viewing the Micro-Blog Entries of People You Are Tracking

- 1 Navigate to your personal workspace.
- 2 Click the *Micro-Blogs and Shared Items* tab.

The *Micro-Blogs* column lists the Micro-Blog entries of the people you are currently tracking.

Viewing a User’s Micro-Blog Entries by Using the Presence Icon

Teaming enables you to view a user’s Micro-Blog entries by clicking the user’s *Presence* icon , located next to his or her name in an entry.

- 1 Click the *Presence* icon of the user whose Micro-Blog entries you want to view.
- 2 Click *View Micro-Blog*.

Viewing a User’s Micro-Blog Entries by Navigating to His or Her Personal Workspace

You can navigate to a user’s personal workspace to view their Micro-Blog entries.

- 1 Navigate to the personal workspace of the person whose Micro-Blog entries you want to view.
- 2 In the main sidebar, click the Micro-Blog folder.

The person’s Micro-Blog entries are listed in the folder.

2.11 Sharing Workspaces, Folders, and Entries

Kablink Teaming enables you to share workspaces, folders, and entries with other Teaming users. This is a quick and easy way to refer a co-worker to a place on the Teaming site.

- ♦ Section 2.11.1, “Sharing Workspaces and Folders,” on page 36
- ♦ Section 2.11.2, “Sharing Entries,” on page 36
- ♦ Section 2.11.3, “Viewing Shared Items,” on page 36

2.11.1 Sharing Workspaces and Folders

- 1 Navigate to the workspace or folder that you want to share.
- 2 Click *Share This Workspace* or *Share This Folder* in the main sidebar.
- 3 Specify the individual users, groups, or teams that you want to share the workspace or folder with.
- 4 In the *Comments* field, specify any comments that you want to include in the e-mail.
- 5 Click *OK*.

A notification is displayed stating that an e-mail was successfully sent to the users, groups, or teams that you specified.

2.11.2 Sharing Entries

- 1 Navigate to and open the entry that you want to share.
- 2 Click *Share This Entry* in the Entry toolbar.
- 3 Specify the individual users, groups, or teams that you want to share the workspace or folder with.
- 4 In the *Comments* field, specify any comments that you want to include in the e-mail.
- 5 Click *OK*.

A notification is displayed stating that an e-mail was successfully sent to the users, groups, or teams that you specified.

2.11.3 Viewing Shared Items

When others share an item with you, Teaming sends you an e-mail notification with a link to the item. Also, Teaming makes it easy to find items that others have shared with you, directly from the Teaming interface.

- 1 Navigate to your personal workspace.
- 2 Click the *Micro-Blogs and Shared Items* tab.

In the right column, Teaming lists all of the items that people have shared with you.

2.12 Subscribing to a Folder or Entry

You can configure Kablink Teaming to send you e-mail notifications for folders and their sub-folders, or for individual entries (this is called “subscribing” to a folder or entry). Also, folder owners can configure Teaming to send e-mail notifications to you (as described in “[Configuring Folders to Send E-Mail Notifications to Other Users](#)” in the *Kablink Teaming 2.0 Advanced User Guide*). However, because a user’s individual subscription settings override those of the folder owner, you can override any higher-level configurations.

If you are particularly interested in a specific folder or entry, you might want to subscribe to that folder or entry. When you subscribe to a folder or entry, Teaming notifies you of the activity that takes place in the folder or entry.

Before you begin subscribing to folders or entries in Teaming, you might want to view the short tutorial video, [Setting Notifications](http://www.brainstorminc.com/cbt/teaming/index.php?category=gettinginformed) (<http://www.brainstorminc.com/cbt/teaming/index.php?category=gettinginformed>). To display the video, follow this link, then click *Setting Notifications*.

- ♦ [Section 2.12.1, “Subscribing to a Folder,” on page 37](#)
- ♦ [Section 2.12.2, “Subscribing to an Entry,” on page 37](#)
- ♦ [Section 2.12.3, “Selecting Notification Types and Delivery Destinations,” on page 37](#)
- ♦ [Section 2.12.4, “Deciding Which Type of E-Mail Notification You Want to Receive,” on page 38](#)
- ♦ [Section 2.12.5, “Adding and Modifying Delivery Destinations,” on page 38](#)
- ♦ [Section 2.12.6, “Overriding Higher-Level Notification Settings,” on page 38](#)

2.12.1 Subscribing to a Folder

- 1 Navigate to the folder that you want to subscribe to.
- 2 Click *E-Mail Notification* in the Folder toolbar.
The Select the Type of E-Mail Notification form is displayed.
- 3 Continue with [Section 2.12.3, “Selecting Notification Types and Delivery Destinations,” on page 37](#).

2.12.2 Subscribing to an Entry

- 1 Navigate to and open the entry that you want to subscribe to.
- 2 In the Footer toolbar of the entry, click *Subscribe to This Entry*.
The Select the Type of E-Mail Notification form is displayed.
- 3 Continue with [Section 2.12.3, “Selecting Notification Types and Delivery Destinations,” on page 37](#).

2.12.3 Selecting Notification Types and Delivery Destinations

This form enables you to choose which type of notification that you want to receive, as well as which e-mail address or phone number destination that you want the notifications to be sent to.

- 1 Select an e-mail address or phone number where you want the notifications to be sent.
You can select multiple e-mail or phone number delivery destinations for each notification type by simply pressing Ctrl and selecting the e-mail addresses or phone numbers.
You can select these delivery destinations in any of the provided sections, which represent the e-mail notification types:
 - ♦ Digest (available only when subscribing to folders)
 - ♦ Individual Messages
 - ♦ Individual Messages without Attachments
 - ♦ Messages Suitable for Text Messaging

For more information on the various notification types, see [Section 2.12.4, “Deciding Which Type of E-Mail Notification You Want to Receive,” on page 38](#).

- 2 (Optional) Select *Disable Notifications Set by Administrator* if you want your selections to override those made by the administrator or folder owner.

For more information, see [Section 2.12.6, “Overriding Higher-Level Notification Settings,” on page 38](#).

- 3 Click *OK*.

2.12.4 Deciding Which Type of E-Mail Notification You Want to Receive

You can receive several types of e-mail notifications:

Digest: (Available for folders only) Teaming sends one message that summarizes all of the activity in the folder and its sub-folders. Teaming sends digest notifications at a schedule established by your site administrator.

Individual Messages: (Includes Attachments) Teaming sends one message for every new or changed entry, and messages include attached files.

Individual Messages without Attachments: Teaming sends one message for every new or changed entry. The e-mail messages do not include files that might be attached to the new or changed entries. Teaming sends all types of individual notifications every five minutes.

Message Suitable for Text Messaging: Teaming sends a message suitable for viewing as a text message. The content of the message includes only the linked title of the new or changed entry. Teaming sends text-message notifications up to every five minutes.

2.12.5 Adding and Modifying Delivery Destinations

You can add and modify your e-mail and phone number contact information in your Personal Profile.

- 1 Click *My Workspace > Modify Profile*.
- 2 Specify the appropriate delivery destination information in the *E-Mail Address*, *Mobile E-Mail Address*, and *Text Messaging E-Mail Address* fields.
- 3 Click *OK*.

Now, when you select your notification types and delivery destinations, the new or modified contact information is displayed.

2.12.6 Overriding Higher-Level Notification Settings

If a folder owner or administrator has configured a folder to send you e-mail notifications, you can override the higher-level settings.

- 1 Navigate to the folder where you want to override the higher-level notification settings.
- 2 Select *E-mail Notification*.
- 3 Select the kinds of notification that you want to receive.
- 4 Select *Disable Notifications Set by Administrator*.
- 5 Click *OK*.

If you want to receive no e-mail notifications:

- 1 Navigate to the folder where you want to override the higher-level notification settings.
- 2 Select *E-mail Notification*.
- 3 Ensure that no e-mail address is selected in any of the sections.
- 4 Select *Disable Notifications Set by Administrator*.
- 5 Click *OK*.

2.13 Using Remote Applications

Remote applications communicate with a third-party, on-line application, and send information from that third-party application back into Kablink Teaming.

For example, your Teaming administrator could create a remote application for Twitter* that displays, in Teaming, all of your Twitter entries.

Remote applications are very customizable, and are set up by your Teaming administrator. Talk with your Teaming administrator if you have a request for a new remote application.

For information on displaying remote applications that have been enabled by your Teaming administrator, see “[Managing Remote Applications](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

You can also display remote applications as folder and workspace accessories, as described in [Section 7.2, “Creating an Accessory,”](#) on page 97.

2.14 Viewing Teaming Folders as RSS Feeds

RSS enables you to subscribe to various RSS feeds and view those feeds in one convenient location.

You can set up a Kablink Teaming folder to be accessed by an RSS reader. When you do this, the Teaming folder becomes an RSS feed, and sends new or modified folder entries to your RSS reader. This is an easy way that you can stay informed on activity in a certain folder.

For more information, see “[Viewing Teaming Folders as RSS Feeds](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

2.15 Synchronizing Teaming Task and Calendar Folders to a Desktop Calendar Application

iCal functionality in Kablink Teaming enables you to synchronize Teaming task folders and calendar folders to other task lists and calendars that supports the iCal format.

- 1 Navigate to the Task folder or Calendar folder that you want to synchronize to your desktop calendar application.
- 2 Click the Footer toolbar, located at the bottom of the folder page.
- 3 In the *iCal URL* section in the provided table, select and copy the iCal URL.

You use this link to export Teaming calendar data for inclusion in another calendar that supports the iCal format (for example, Google* and Outlook).

- 4** Paste the iCal URL into the required section of the desktop calendar application.

Consult the documentation for the desktop application for instructions on where to paste the iCal URL, and complete the synchronization.

Navigating the Teaming Interface

3

Kablink® Teaming provides various methods of navigating the interface.

- ♦ Section 3.1, “Navigating the Workspace Tree,” on page 41
- ♦ Section 3.2, “Finding Specific People, Places, or Tagged Items,” on page 41
- ♦ Section 3.3, “Viewing and Revisiting Recent Places,” on page 42
- ♦ Section 3.4, “Viewing and Revisiting Recent Entries,” on page 42
- ♦ Section 3.5, “Using the Favorites Panel,” on page 42
- ♦ Section 3.6, “Accessing Your Teams,” on page 43
- ♦ Section 3.7, “Using Tags,” on page 43

3.1 Navigating the Workspace Tree

You can access the Workspace tree from any page within Kablink Teaming. Located in the upper left corner of the Teaming interface, the Workspace tree displays the path of all of the workspaces and folders that contain the place you are currently viewing, without leaving the current page.

To navigate to another workspace or folder:

- 1 Click the plus sign (+) next to *Home Workspace*.
- 2 Navigate to and click the linked name of the desired location in the Workspace tree.
Teaming displays the desired location.

To view a demonstration of how this is done, see [Using the Workspace Tree \(http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation\)](http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation). To display the video, follow the link, then click *Using the Workspace Tree*.

3.2 Finding Specific People, Places, or Tagged Items

The Find feature is a quick way to navigate to a certain place within Kablink Teaming. Use the Find feature to locate people, places, and tags that you know exist on the Teaming site.

If you are looking for a subject-matter expert, or want to see what information is available concerning a particular topic, use the Teaming Search functionality. For more information on Search in Teaming, see [Section 2.5, “Searching for Information,” on page 29](#).

Before you begin using Teaming Find functionality, you might want to view the short tutorial video, [Using Find \(http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation\)](http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation). To display the video, follow the link, then click *Using Find*.

The Find feature provides the following fields:

People: Enables you to quickly navigate to a user’s personal workspace.

Places: Enables you to quickly navigate to any folder or workspace within Teaming. For example, if you want to locate a colleague’s Blog folder, simply type Blog, then specify the name of your colleague. The appropriate place is listed in the drop-down list.

Tags: Enables you to locate any workspaces, folders, or entries that have been tagged. Specify the name of the tag that you are searching for, and click the name in the drop-down list. Teaming displays all of the workspaces, folders, and entries that have been tagged with that particular tag.

Teaming displays all personal tags, and all community tags for which you have appropriate rights.

When using these fields, Teaming applies the Type-to-Find feature. As you type, Teaming lists items matching what you have typed so far (all items matching “d”, then all items matching “di,” for example).

If there is more than one panel of choices, you can click the left-arrow and right-arrow icons to review your choices.

3.3 Viewing and Revisiting Recent Places

Kablink Teaming provides a *Recent Places* section, where you can see and quickly revisit the folders and workspaces you have most recently accessed.

- 1 In the main sidebar, in the *Recent Places* section, click the place that you want to revisit.

The *Recent Places* section stores your five most recently visited places in your current Teaming session.

3.4 Viewing and Revisiting Recent Entries

Kablink Teaming enables you to view and quickly revisit the entries that you have recently posted and recently visited.

- 1 Navigate to your personal workspace.
- 2 Click the *Recent Entries* tab.

In the left column, Teaming displays the entries that you have recently posted.

In the right column, Teaming displays the entries that you have recently visited.

3.5 Using the Favorites Panel

When you click the *Favorites* drop-down list, Kablink Teaming displays the Favorites panel. You can add your favorite workspaces and folders to this panel, so you can access them more easily in the future.

Before you start working with the Favorites Panel, you might want to view the short tutorial video, [Creating Favorites \(http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation\)](http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation). To display the video, follow the link, then click *Creating Favorites*.

- ♦ [Section 3.5.1, “Accessing Your Favorite Places,” on page 43](#)
- ♦ [Section 3.5.2, “Adding Places to the Favorites Panel,” on page 43](#)
- ♦ [Section 3.5.3, “Editing the Favorites Panel,” on page 43](#)

3.5.1 Accessing Your Favorite Places

Teaming makes it easy to quickly access your favorite places.

- 1 Click the *Favorites* drop-down list, located in the upper right corner of the Teaming interface.
- 2 Click the linked title of the place that you want to visit.

3.5.2 Adding Places to the Favorites Panel

- 1 Use the navigation bar or the Workspace tree to view a workspace or folder.
- 2 After arriving at one of your favorite places, click the *Favorites* drop-down list.
- 3 Click *Add this place*.

3.5.3 Editing the Favorites Panel

The Favorites panel includes tools for organizing links to your favorite places.

- 1 Click the *Favorites* drop-down list, then click *Edit Favorites*.
- 2 Select the item you want to edit.
- 3 Click *Down*, *Up*, or *Delete*.
The *Down* and *Up* buttons move the link down or up in your Favorites list.
- 4 Click *OK*.

3.6 Accessing Your Teams

Kablink Teaming makes it easy to quickly access your team workspaces where you are a member.

- 1 Click the *My Teams* drop-down list, located in the upper right corner of the Teaming interface.
This list contains all of the teams of which you are a member.
- 2 Click the linked title of the team workspace that you want to visit.

To view a demonstration of how this is done, see [Setting Up My Teams \(http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation\)](http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation). To display the video, follow the link, then click *Setting Up My Teams*.

3.7 Using Tags

Tags are keywords that categorize a workspace, folder, or entry. Tagging functionality in Kablink Teaming enables you to create virtual containers for places and entries. Like folders in your e-mail, you can categorize information, and then come back to it at a later time.

Before you begin using tags, you might want to view the short tutorial video, [Using Tags \(http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation\)](http://www.brainstorminc.com/cbt/teaming/index.php?category=navigation). To display the video, follow the link, then click *Using Tags*.

- ♦ [Section 3.7.1, “Tagging Workspaces or Folders,” on page 44](#)
- ♦ [Section 3.7.2, “Tagging Entries,” on page 44](#)

- ♦ [Section 3.7.3, “Locating Tagged Items,” on page 44](#)
- ♦ [Section 3.7.4, “Choosing Between Personal Tags and Community Tags,” on page 44](#)

3.7.1 Tagging Workspaces or Folders

- 1 Navigate to the workspace or folder that you want to tag.
- 2 In the *Tag This Workspace* (or *Tag This Folder*) section of the main sidebar, type the name of the tag into the field in either the *Personal Tags* or *Community Tags* section.
To decide whether you want to create a personal or community tag, see [Section 3.7.4, “Choosing Between Personal Tags and Community Tags,” on page 44](#).
This field uses Type-to-Find functionality, so if a tag already exists with the desired name, it appears in the drop-down list. If the name does not appear in the drop-down list, you are creating a new tag.
- 3 Finish typing the name of the tag, or select it from the drop-down list, then click *Add*.

The workspace or folder is now marked with the tag that you specified.

3.7.2 Tagging Entries

- 1 In the entry that you want to tag, click *Tag this*.
- 2 Type the name of the tag into the field in either the *Personal Tags* or *Community Tags* section.
To decide whether you want to create a personal or community tag, see [Section 3.7.4, “Choosing Between Personal Tags and Community Tags,” on page 44](#).
This field uses Type-to-Find functionality, so if a tag already exists with the desired name, it appears in the drop-down list. If the name does not appear in the drop-down list, you are creating a new tag.
- 3 Finish typing the name of the tag, or select it from the drop-down list, then click *Add*.
The entry is now marked with the tag that you specified.

3.7.3 Locating Tagged Items

Teaming enables you to locate all places and entries that have a particular tag.

- 1 In the *Find* section of the Navigation toolbar, in the *Tags* field, specify the name of the tag that you want to search for.
- 2 Select the tag from the drop-down list.
or
Finish typing the name of the tag, then press Enter.
Teaming displays all of the places and entries that have the tag that you specified.

3.7.4 Choosing Between Personal Tags and Community Tags

Personal Tags: Personal tags are for your use only. When you create a personal tag, it can be used and viewed only by you.

Community Tags: Community tags can be used and viewed by anyone who has rights to view the workspace, folder, or entry where a community tag is implemented. For example, if you create a community tag on the File folder in your team workspace, then anyone with View rights to the File folder can use the tag you created to tag other places with the same tag name. They can also use Teaming Search and Find features to locate entries that have been tagged with that tag name.

You can tag places and entries with a community tag only if you have appropriate rights.

For more information on using Search to locate tagged items, see [Section 2.5.2, “Using Advanced Search,”](#) on page 30.

For more information on using Find to locate tagged items, see [Section 3.2, “Finding Specific People, Places, or Tagged Items,”](#) on page 41.

Managing and Using Workspaces

4

Your Kablink® Teaming site is made up of various workspaces. Workspaces are designated areas where people can work together to accomplish tasks. Teaming supports multiple types of workspaces, including personal workspaces, where you can store items such as your personal files, calendars, and tasks; and team workspaces, where you can collaborate with team members by sharing ideas, files, and more. Other useful types of workspaces are also available for you to use.

You can see the structure of the workspaces in your Teaming site by expanding *Home Workspace* and browsing the [Workspace tree](#).

- ♦ [Section 4.1, “General Workspace Management,” on page 47](#)
- ♦ [Section 4.2, “Managing Your Personal Workspace,” on page 51](#)
- ♦ [Section 4.3, “Managing a Team Workspace,” on page 53](#)
- ♦ [Section 4.4, “Managing a Discussions Workspace,” on page 58](#)
- ♦ [Section 4.5, “Managing a Project Management Workspace,” on page 58](#)
- ♦ [Section 4.6, “Managing a Landing Page,” on page 58](#)
- ♦ [Section 4.7, “Understanding Global Workspaces,” on page 58](#)

4.1 General Workspace Management

This section contains task information that applies to all types of workspaces.

- ♦ [Section 4.1.1, “Creating a New Workspace,” on page 47](#)
- ♦ [Section 4.1.2, “Deleting a Workspace,” on page 48](#)
- ♦ [Section 4.1.3, “Copying a Workspace,” on page 48](#)
- ♦ [Section 4.1.4, “Moving a Workspace,” on page 48](#)
- ♦ [Section 4.1.5, “Adding a Sub-Workspace,” on page 49](#)
- ♦ [Section 4.1.6, “Adding Additional Folders to a Workspace,” on page 49](#)
- ♦ [Section 4.1.7, “Generating Activity Reports for a Workspace,” on page 50](#)
- ♦ [Section 4.1.8, “Defining a User-Friendly URL for a Workspace,” on page 50](#)
- ♦ [Section 4.1.9, “Customizing the Workspace View,” on page 51](#)
- ♦ [Section 4.1.10, “Branding a Workspace,” on page 51](#)

4.1.1 Creating a New Workspace

Teaming enables you to create new workspaces in any workspace where you have appropriate rights.

- 1 Navigate to the workspace where you want to create the new workspace.
- 2 Click *Manage > Add New Workspace*.
The Add New Workspace page is displayed.
- 3 Specify the information.

Not all of the information is displayed for each type of workspace that you are creating.

Workspace title: Specify a title for the workspace.

If you leave this field blank, the workspace is titled `Workspace`.

Team Members: (Conditional) This section is displayed only if you are creating a team workspace. Use this section to specify users and groups that you want to include as members of your team workspace.

Workspace: Select the type of workspace that you want to create.

Workspace Folders: Use this section to select the folders that you want the workspace to contain.

Announcement: (Optional) Create an announcement message to be sent to all members of the team.

If you are not creating a team workspace, this message is sent to all team members of the parent workspace.

- 4 Click *OK*.

4.1.2 Deleting a Workspace

- 1 Navigate to the workspace that you want to delete.
- 2 Click *Manage > Delete This Workspace*.
The Delete This Workspace page is displayed.
- 3 Click *OK*.

4.1.3 Copying a Workspace

- 1 Navigate to the workspace that you want to copy.
- 2 Click *Manage > Copy This Workspace*.
The Copy Workspace page is displayed.
- 3 Specify the following information:
 - Find a Folder or Workspace:** (Optional) If you want to copy a workspace other than the workspace where you currently are, specify the workspace in the provided field.
If you do not specify anything, then you copy the workspace where you currently are.
 - Select the Destination Folder or Workspace:** Use the Workspace tree to navigate to and select the folder or workspace where you want to copy the workspace.
- 4 Click *OK*.

4.1.4 Moving a Workspace

Teaming enables you to move a workspace into any folder or workspace where you have appropriate rights.

- 1 Navigate to the workspace that you want to move.
- 2 Click *Manage > Move This Workspace*.
The Move Workspace page is displayed.

- 3 Specify the following information:

Find a Folder or Workspace: (Optional) If you want to move a workspace other than the workspace where you currently are, specify the workspace in the provided field.

If you do not specify anything, then you move the workspace where you currently are.

Select the Destination Folder or Workspace: Use the Workspace tree to navigate to and select the folder or workspace where you want to move the workspace.

- 4 Click *OK*.

4.1.5 Adding a Sub-Workspace

Teaming enables you to create sub-workspaces inside of existing workspaces.

- 1 Navigate to the workspace where you want to add the sub-workspace.

- 2 Click *Manage > Add New Workspace*.

The Add New Workspace page is displayed.

- 3 Specify the information.

Not all of the information is displayed for each type of workspace that you are creating.

Workspace title: Specify a title for the workspace.

If you leave this field blank, the workspace is titled *workspace*.

Team Members: (Conditional) This section is displayed only if you are creating a team workspace. Use this section to specify users and groups that you want to include as members of your team workspace.

Workspace: Select the type of workspace that you want to create.

Workspace Folders: Use this section to select the folders that you want the workspace to contain.

Announcement: (Optional) Create an announcement message to be sent to all members of the team.

If you are not creating a team workspace, this message is sent to all team members of the parent workspace.

- 4 For information on filling in this page, see [Section 4.1.1, “Creating a New Workspace,” on page 47](#).

4.1.6 Adding Additional Folders to a Workspace

Teaming enables you to add additional folders to your workspace at any time.

- 1 Navigate to the workspace where you want to add the new folders.

- 2 Click *Manage > Add new folder*.

The Add New Folder page is displayed.

- 3 Specify the following information:

Folder Title: Specify a title for the folder.

If you do not provide a title, the folder is given the default folder name. For example, a Discussion folder is named *Discussion*.

Folder: Select the type of folder that you want to create.

For information about each type of folder, see [Section 5.3, “Choosing a Folder Type,”](#) on page 66.

- 4 Click *OK*.

4.1.7 Generating Activity Reports for a Workspace

Teaming enables you to generate reports about the activity that has occurred in a particular workspace.

- 1 Navigate to the workspace that you want to generate the activity report for.
- 2 Click *Manage > Activity Reports*.
The Folder Activity page is displayed.
- 3 Specify the following information:
 - Report on Activity Between:** Select the date range for which you want to generate the activity report.
 - Report Workspace or Folder Activity:** Select this option to see how many views, adds, modifies, and deletes have been made in the folder. You can also select to have this report sorted so you can view the activity of individual team members.
 - Report on Workflow State:** Select this option to view the activity of a workflow. You can select to show the average amount of time the workflow spent in each state, or show the number of entries that are currently in each state.
 - Select the Folders for Reporting:** Select the folders about which you want to generate the activity report. If you select the workspace, then Teaming generates an activity report that includes all folders in the workspace.
- 4 Click *OK*.

4.1.8 Defining a User-Friendly URL for a Workspace

When you define a user-friendly URL for your workspace, it can make it easier for others to easily navigate to the workspace.

- 1 Navigate to the workspace where you want to define the URL.
- 2 In the Workspace toolbar, click *Manage > Configure*.
The Configure Default Settings page is displayed.
- 3 In the *Define a simple URL for this folder or workspace* section, select one of the predefined global keywords from the Define URL drop-down list.
Unless you are a site administrator, your URL must begin with one of these predefined global keywords.
- 4 In the provided field, specify the desired URL for the folder or workspace.
- 5 Click *Add > Close*.

To delete a defined URL, select the URL in the *Currently defined URLs* section, then click *Delete the selected URLs*.

4.1.9 Customizing the Workspace View

Teaming enables you to customize the layout of your workspace. For more information, see “[Creating Custom Workspace Views](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

4.1.10 Branding a Workspace

Branding a workspace is a good way to make the workspace more unique and identifiable. When you brand a workspace, the brand is also applied to all sub-workspaces and sub-folders.

For more information on branding, see “[Branding a Folder or Workspace](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

4.2 Managing Your Personal Workspace

Your personal workspace in Kablink Teaming is a place where you can store your personal files, blogs, photos, and all other types of Teaming folder entries.

Your personal workspace also includes relevance tabs that help you easily keep track of tasks and calendar events, get informed on new entries, view shared items, and more.

The relevance tabs are located in the home page of your personal workspace. These tabs enable you to get quick access to important information that pertains directly to you.

Before you begin working in your personal workspace, you might want to view the short tutorial video, [Exploring Your Personal Workspace](http://www.brainstorminc.com/cbt/teaming/index.php?category=gettingstarted) (<http://www.brainstorminc.com/cbt/teaming/index.php?category=gettingstarted>). To display the video, follow the link, then click *Exploring Your Personal Workspace*.

- ♦ [Section 4.2.1, “Using the Overview Tab,” on page 51](#)
- ♦ [Section 4.2.2, “Using the What’s New Tab,” on page 52](#)
- ♦ [Section 4.2.3, “Using the Tasks and Calendars Tab,” on page 52](#)
- ♦ [Section 4.2.4, “Viewing Recently Posted and Recently Visited Entries,” on page 53](#)
- ♦ [Section 4.2.5, “Using the Micro-Blogs and Shared Items Tab,” on page 53](#)
- ♦ [Section 4.2.6, “Viewing Your Profile Information,” on page 53](#)

4.2.1 Using the Overview Tab

The *Overview* tab contains an accessory panel. You can use this accessory panel to make items in your personal workspace more visible. For example, by default, the *Overview* tab contains a Guestbook accessory that references the Guestbook folder in your personal workspace. By displaying this accessory in the *Overview* tab, you don’t need to view the Guestbook folder in order to see who has signed your Guestbook.

By default, a Task, Guestbook, Blog, and Photo Album accessory exist in this accessory panel, but you can add more as you desire. (For information on how to add additional accessories, see [Section 7.2, “Creating an Accessory,” on page 97](#).)

4.2.2 Using the What's New Tab

Use the *What's New* tab to accomplish the following tasks:

- ♦ [“Finding What's New” on page 52](#)
- ♦ [“Finding What's Hot” on page 52](#)

Finding What's New

The *What's New* tab enables you to find what's new in your teams, tracked places, or the entire site.

- 1 In the home page of your personal workspace, click the *What's New* tab.
- 2 Select *My Teams*, *Tracked Places*, or *Site Wide*, depending on where you want Teaming to search for new items.

All of the new items recently added are displayed in the left side of the page, in the *What's New* section.

Finding What's Hot

The *What's New* tab enables you to find the entries and folders that are most popular in your Teaming site.

- 1 In the home page of your personal workspace, click the *What's New* tab.
- 2 Select *Site Wide*.

The most popular items in your Teaming site are displayed in the right side of the page, in the *What's Hot Site Wide* section.

4.2.3 Using the Tasks and Calendars Tab

Use the *Tasks and Calendars* tab to accomplish the following tasks:

- ♦ [“Viewing Your Tasks” on page 52](#)
- ♦ [“Viewing Today's Calendar Events” on page 52](#)

Viewing Your Tasks

To help you keep track of tasks that have been assigned to you, Teaming provides a quick, easy way to view tasks.

- 1 In the home page of your personal workspace, click the *Tasks and Calendars* tab.
In the left column, Teaming displays the tasks that are assigned to you. You can sort these tasks by tasks due within two weeks, or any tasks that are currently assigned to you.

Viewing Today's Calendar Events

To help you keep track of your calendar events, Teaming enables you to view all of the calendar events for which you are scheduled on the current day.

- 1 In the home page of your personal workspace, click the *Tasks and Calendars* tab.
The right section of the page displays today's schedule with all of the calendar events from all of your tracked calendars.

4.2.4 Viewing Recently Posted and Recently Visited Entries

Teaming enables you to view which entries you have most recently posted, and which entries you have most recently visited. This can help you remember what you have currently been working on, or quickly locate an entry that you have recently created or viewed.

- 1 In the home page of your personal workspace, click the *Recent Entries* tab.

The left section of the page displays the entries that you have recently posted, and the right section of the page displays the entries that you have recently visited.

4.2.5 Using the Micro-Blogs and Shared Items Tab

Use the *Micro-Blogs and Shared Items* tab to accomplish the following tasks:

- ♦ “Viewing the Micro-Blog Entries of People You Are Tracking” on page 53
- ♦ “Viewing What Others Have Shared With You” on page 53

Viewing the Micro-Blog Entries of People You Are Tracking

- 1 In the home page of your personal workspace, click the *Micro-Blogs and Shared Items* tab.

The *Micro-Blogs* column lists the Micro-Blog entries of the people you are currently tracking.

Viewing What Others Have Shared With You

When others share an item with you, Teaming sends you an e-mail notification with a link to the item. Also, Teaming makes it easy to find items that others have shared with you, directly from the Teaming interface.

- 1 In the home page of your personal workspace, click the *Micro-Blogs and Shared Items* tab.

In the right column, Teaming lists all of the items that people have shared with you.

4.2.6 Viewing Your Profile Information

- 1 In the home page of your personal workspace, click the *Profile* tab.

Your personal profile information is displayed.

For information on modifying your profile information, see [Section 1.5.1, “Modifying Your Profile,” on page 19](#).

4.3 Managing a Team Workspace

Team workspaces are the key to helping you and your team accomplish tasks and meet objectives, together.

As the owner of a workspace, you are primarily responsible for workspace administration. You can create other containers for information (sub-workspaces and folders), adjust access control to determine who can do what in the workspace, and provide some initial content to assist team members with getting started.

- ♦ [Section 4.3.1, “Creating a Team Workspace,” on page 54](#)
- ♦ [Section 4.3.2, “Adding Additional Team Members to Your Workspace,” on page 56](#)

- ♦ Section 4.3.3, “Sending E-Mail to Team Members and Announcing the Workspace After Its Creation,” on page 56
- ♦ Section 4.3.4, “Starting or Scheduling a Team Meeting,” on page 57
- ♦ Section 4.3.5, “Viewing Team Members,” on page 57
- ♦ Section 4.3.6, “Allowing Visitors to Your Team Workspace,” on page 57

4.3.1 Creating a Team Workspace

By default, everyone in Teaming has rights to create a team workspace.

Team workspaces are the most common type of workspaces. They facilitate team objectives by enabling team members to quickly share files, share ideas, and work together more efficiently and effectively.

Kablink Teaming enables you to create a highly visible team workspace in the Team Workspaces directory, or you can create a nested team workspace, which is a team workspace inside of an existing team workspace.

Before you begin creating a team workspace, you might want to view the short tutorial video, [Building a Team Workspace](http://www.brainstorminc.com/cbt/teaming/index.php?category=gettingstarted) (<http://www.brainstorminc.com/cbt/teaming/index.php?category=gettingstarted>). To display the video, follow the link, then click *Building a Team Workspace*.

- ♦ “Creating a Highly Visible Team Workspace” on page 54
- ♦ “Creating a Team Workspace inside of an Existing Team Workspace” on page 55

Creating a Highly Visible Team Workspace

If you want your team workspace to be highly visible and easy to find in the workspace tree, create the team workspace in the Team Workspaces directory.

- 1 Expand *Home Workspace* in the Workspace Tree Navigation tool, located near the top of the Teaming interface.

The Home Workspace directory is the highest-level folder in the workspace tree, and might be named something specific to your organization.

- 2 Click *Team Workspaces*.

- 3 Click *Add a team workspace*.

The Add a Team Workspace page is displayed.

If you do not see this option, your site administrator has not permitted you to create a new workspace at this level. Continue to expand the workspace tree, following the path of your organizational unit, then click the name of the directory where you want to create the new team workspace. Or, follow the steps in “[Creating a Team Workspace inside of an Existing Team Workspace](#)” on page 55.

- 4 Specify the following information:

Workspace Title: Provide a title for the workspace.

Team Members: Specify the team members.

You can specify individual users, entire groups, or add names that are on your clipboard. For more information about using the Teaming clipboard, see [Section 8.5, “Using the Teaming Clipboard,” on page 109](#).

Workspace Folders: Select the folders that you want the workspace to contain.

If you later decide that you want to add additional folders, you can add them at any time.

For information on how to add folders to an existing workspace, see [Section 4.1.6, “Adding Additional Folders to a Workspace,” on page 49](#).

Announcement: (Optional) Select the check box, then type a message in the *Announcement Text* field.

This message informs team members about the existence of the workspace, and can also explain the value of the workspace.

- 5 Click *OK* to create the new workspace.

Creating a Team Workspace inside of an Existing Team Workspace

Teaming enables you to create nested workspaces, which are workspaces inside of other workspaces. You can create a team workspace inside of any existing workspace where you have appropriate rights.

You might want to do this if you are not concerned about having high visibility in the workspace tree, and if the team workspace that you want to create consists mostly of members that already belong to a certain workspace.

- 1 Navigate to the workspace where you want to create the new team workspace.

- 2 Click *Manage > Add New Workspace*.

The Add New Workspace page is launched.

- 3 In the *Workspace* section, select *Team Workspace*.

You can also create a basic workspace, a project management workspace, and a discussions workspace.

- 4 Specify the following information:

Workspace Title: Specify a title for the workspace.

Team Members: Specify the team members.

You can specify individual users, entire groups, or add names that are on your clipboard. For more information about using the Teaming clipboard, see [Section 8.5, “Using the Teaming Clipboard,” on page 109](#).

You can also click *Team Members*. This displays a list of all of the members of the team workspace where you are creating your new team workspace. Select the names of the users that you want to include in your new team workspace.

Workspace Folders: Select the folders that you want the workspace to contain.

If you later decide that you want to add additional folders, you can add them at any time.

For information on how to add folders to an existing workspace, see [Section 4.1.6, “Adding Additional Folders to a Workspace,” on page 49](#).

Announcement: (Optional) Select the check box, then type a message in the *Announcement Text* field.

This message informs team members about the existence of the workspace, and can also explain the value of the workspace.

- 5 Click *OK* to create the new workspace.

4.3.2 Adding Additional Team Members to Your Workspace

After you create your workspace, you can add other Kablink Teaming users who need to join your team.

Before you begin adding team members to your workspace, you might want to view the short tutorial video, [Adding Members to a Team Workspace \(http://www.brainstorminc.com/cbt/teaming/index.php?category=gettingstarted\)](http://www.brainstorminc.com/cbt/teaming/index.php?category=gettingstarted). To display this video, follow the link, then click *Adding Members to a Team Workspace*.

- 1 Navigate to the team workspace where you want to add the additional team members.
- 2 In the sidebar, in the *Team* section, click *Manage Team*.
The Add or Delete Team Members page is launched.
- 3 (Conditional) If this workspace is currently inheriting its team membership from a parent folder, click *Yes*.
- 4 In the *Users* field, specify the names of the individual users that you want to add to the team.
You can also specify entire groups in the *Groups* field, or you can add names that are on your clipboard by clicking *Clipboard User Names*. For more information about using the Teaming clipboard, see [Section 8.5, “Using the Teaming Clipboard,” on page 109](#).
- 5 Click *OK*.

You can announce the workspace to the new team members. For information on how to do this, see [Section 4.3.3, “Sending E-Mail to Team Members and Announcing the Workspace After Its Creation,” on page 56](#).

4.3.3 Sending E-Mail to Team Members and Announcing the Workspace After Its Creation

Teaming enables you to send e-mail messages to your entire team. Also, if new team members join the team after the team workspace has already been created, you can use this functionality to announce the workspace to the new team members.

To send mail to team members:

- 1 Navigate to the team workspace.
- 2 In the sidebar, in the *Team* section, click *Send E-Mail To Team*.
The Send E-Mail page is displayed.
- 3 Fill in the appropriate fields.
For information on filling in the rest of the Send E-Mail form, see [Section 8.4, “Filling Out the Send E-Mail Page,” on page 109](#).
- 4 Click *OK*.

4.3.4 Starting or Scheduling a Team Meeting

If you have Kablink Conferencing, you can start or schedule a team meeting.

- 1 Navigate to the team workspace that contains the team members with whom you want to meet.
- 2 In the main sidebar, click *Team > Start a Team Meeting*.
The Add meeting page is displayed.
- 3 In the *Team Members* section, deselect any team members that you do not want to invite to the meeting.
By default, all members of the team are selected.
- 4 Click *Start Meeting Now*, or *Schedule for Later*, depending on when you want to meet.
The Conferencing client is launched.

For more information about how to use Kablink Conferencing, see the [Kablink Conferencing User Guide](http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf) (<http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf>).

4.3.5 Viewing Team Members

- ♦ “Viewing Team Members in an Accessory from the Workspace Home Page” on page 57
- ♦ “Viewing Team Members from Any Page within The Workspace” on page 57

Viewing Team Members in an Accessory from the Workspace Home Page

Accessories are sections at the top of workspaces and folders that provide summary information for you. For more information on working with accessories, see [Chapter 7, “Managing Accessories,”](#) on page 95.

By default, Kablink Teaming includes a team-membership accessory on the home page of your workspace. This accessory displays all team members.

Viewing Team Members from Any Page within The Workspace

You can view the members of the team from any folder within the workspace:

- 1 On any page within the workspace, click *Team > View Team* in the main sidebar.

4.3.6 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 Navigate to the team workspace where you want to allow visitors.
- 2 Click *Manage > Access Control*.
Teaming displays the *Configure Access Control* page for the team workspace.
- 3 Ensure that the workspace is not inheriting its access control settings. Select the *no* radio button, then click *Apply*.

- 4 (Conditional) If *Visitor* is not already a column in the provided table, click *Add a role > Visitor*:
- 5 On the left side of the table, click *Add a User*, and use the type-to-find feature to select the name of the person who you want to add as a visitor to the team workspace.
- 6 In that new user's row, select the check box in the *Visitor* column.
- 7 Repeat **Step 5** and **Step 6** until you have added all your visitors.
- 8 Click *Save Changes > Close*.

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

For more information on managing access control, see “[Managing Access Control for Users and Groups](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

4.4 Managing a Discussions Workspace

Create a Discussions workspace if you want a place to store multiple discussion forums. This can help organize your Teaming site, so users know where they should go if they are looking for a particular discussion forum.

For more information on Discussions workspaces, see “[Creating and Managing a Discussions Workspace](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

4.5 Managing a Project Management Workspace

Project Management workspaces are optimized for managing a project.

Project Management 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.

For more information on Project Management workspaces, see “[Creating and Managing a Project Management Workspace](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

4.6 Managing a Landing Page

Kablink Teaming enables you to configure a workspace to have a landing page. When you create a workspace landing page, you can populate that landing page with entries that exist within the workspace.

For information on how to create a landing page on a workspace, see “[Creating and Managing Landing Pages](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

4.7 Understanding Global Workspaces

Global workspaces contain information that might be of interest throughout your organization.

For more information on global workspaces, see “[Establishing Global Workspaces](#)” in the *Kablink Teaming 2.0 Administration Guide*.

Managing and Using Folders

5

The topics in this section describe how to perform management functions for all types of Kablink® Teaming folders.

- ♦ [Section 5.1, “General Folder Management,” on page 59](#)
- ♦ [Section 5.2, “Folder Tools,” on page 65](#)
- ♦ [Section 5.3, “Choosing a Folder Type,” on page 66](#)

Most functions are the same, regardless of the type of folder that you are managing. However, some management functions are unique to individual folder types. These functions are described in [Section 5.3, “Choosing a Folder Type,” on page 66](#).

5.1 General Folder Management

This section contains task information that applies to all types of Kablink Teaming folders.

- ♦ [Section 5.1.1, “Creating a New Folder,” on page 59](#)
- ♦ [Section 5.1.2, “Deleting a Folder,” on page 60](#)
- ♦ [Section 5.1.3, “Copying a Folder,” on page 60](#)
- ♦ [Section 5.1.4, “Moving a Folder,” on page 60](#)
- ♦ [Section 5.1.5, “Importing Files into a Folder,” on page 61](#)
- ♦ [Section 5.1.6, “Accessing WebDAV Files from within Teaming,” on page 62](#)
- ♦ [Section 5.1.7, “Generating an Activity Report on a Folder,” on page 63](#)
- ♦ [Section 5.1.8, “Subscribing to E-Mail Notifications from a Folder,” on page 63](#)
- ♦ [Section 5.1.9, “Setting Up a Folder to Receive Entries Via E-Mail,” on page 63](#)
- ♦ [Section 5.1.10, “Adding Entries to a Folder Via E-Mail,” on page 64](#)
- ♦ [Section 5.1.11, “Changing the Folder View,” on page 64](#)
- ♦ [Section 5.1.12, “Branding a Folder,” on page 65](#)

5.1.1 Creating a New Folder

Teaming enables you to create folders in any workspace where you have appropriate rights.

- 1 Navigate to the workspace where you want to create the new folders.
- 2 Click *Manage > Add new folder*.

The Add New Folder page is displayed.

- 3 Specify the following information:

Folder Title: Specify a title for the folder.

If you do not provide a title, the folder is given the default folder name. For example, a Discussion folder is named *Discussion*.

Folder: Select the type of folder that you want to create.

For information about each type of folder, see [Section 5.3, “Choosing a Folder Type,” on page 66](#).

- 4 Click *OK*.

To view a demonstration of how this is done, see [Creating a Folder \(http://www.brainstorminc.com/cbt/teaming/index.php?category=gettingstarted\)](http://www.brainstorminc.com/cbt/teaming/index.php?category=gettingstarted). To display the video, follow the link, then click *Creating a Folder*.

5.1.2 Deleting a Folder

- 1 Navigate to the folder that you want to delete.
- 2 Click *Manage > Delete This Folder*.
The Delete This Folder page is displayed.
- 3 (Conditional) If the folder is a mirrored folder, you can select to delete the source files of the folder, and also all of the mirrored folders' sub-folders.
Mirrored folder functionality is available only in Novell Teaming.
- 4 Click *OK*.

5.1.3 Copying a Folder

- 1 Navigate to the folder that you want to copy.
- 2 Click *Manage > Copy This Folder*.
The Copy Folder page is displayed.
- 3 Specify the following information:
Find a Folder or Workspace: (Optional) If you want to copy a folder other than the folder where you currently are, specify the folder in the provided field.
If you do not specify anything, then you copy the folder where you currently are.
Select the Destination Folder or Workspace: Use the Workspace tree to navigate to and select the folder or workspace where you want to copy the folder.
- 4 Click *OK*.

5.1.4 Moving a Folder

Teaming enables you to move a folder into any folder or workspace where you have appropriate rights.

- 1 Navigate to the folder that you want to move.
- 2 Click *Manage > Move This Folder*.
The Move Folder page is displayed.
- 3 Specify the following information:
Find a Folder or Workspace: (Optional) If you want to move a folder other than the folder where you currently are, specify the folder in the provided field.
If you do not specify anything, then you move the folder where you currently are.

Select the Destination Folder or Workspace: Use the Workspace tree to navigate to and select the folder or workspace where you want to move the folder.

4 Click *OK*.

5.1.5 Importing Files into a Folder

Teaming enables you to import files from any location and add them to a folder in your workspace. There are two ways to do this.

- ♦ “[Dragging and Dropping Files](#)” on page 61
- ♦ “[Importing Files into the File Folder](#)” on page 61
- ♦ “[Importing Files as Entry Attachments](#)” on page 61

Dragging and Dropping Files

Teaming enables you to drag files from any location, and drop them into any Teaming folder.

This option is not available in Blog folders.

- 1 Navigate to the folder where you want to import the files.
- 2 Click *Add Files to Folder* in the Folder Entry toolbar.
The drag-and-drop window opens.
- 3 Drag a file from one location, such as your desktop, and drop it onto the folder icon in the drag-and-drop window.
This adds the document as a new file entry. The name of the document is automatically the name of the entry.

Importing Files into the File Folder

For specific information about File folders in Teaming, see [Section 5.3.5, “File,” on page 71](#).

You can import single files into a File folder by browsing your computer’s file system and creating a new file entry.

- 1 Navigate to the File folder where you want to import the file.
- 2 Click *Add File Entry* in the Folder Entry toolbar.
- 3 Click *Browse*, then browse to and select the file that you want to import.
- 4 Add a description of the file in the *Description* field, then click *OK*.

Importing Files as Entry Attachments

If you want to add files to a folder other than a File folder, you can browse for the file by adding an entry to the folder, then adding the file as an attachment to the entry.

For more information about attaching files to entries, see [Section 6.13, “Attaching Files to a Folder Entry,” on page 90](#).

5.1.6 Accessing WebDAV Files from within Teaming

WebDAV is a standard collaborative editing and file management tool. Teaming supports the use of WebDAV tools, and enables you to manage your WebDAV files from within Teaming.

- ♦ [“Prerequisites for Using WebDAV” on page 62](#)
- ♦ [“Accessing Files Through WebDAV” on page 62](#)

Prerequisites for Using WebDAV

Teaming enables WebDAV tools only in the following environments:

Windows: When using Internet Explorer Version 7.0 or later as your Web browser, and you are using Microsoft® Windows® XP as your operating system.

Linux: When using SUSE® Linux Enterprise Desktop (SLED) 10 or Suse Linux Enterprise Desktop 11 via Nautilus.

Accessing Files Through WebDAV

Accessing a file folder through WebDAV is not exactly the same as accessing files in a standard disk folder. This is because Teaming entries are more rich than typical files in a folder. For example, files in Teaming can contain multiple versions and comment threads; likewise, each Teaming entry can contain multiple files, or no files at all.

When you use WebDAV files from within Teaming, you might need to specify your Teaming username and password several times. WebDAV requires several passwords for applications (your browser and Teaming), and it might require a third login when accessing an individual file.

While running Novell iChain® or Access Manager on your server, you might be required to sign in multiple times as you access WebDAV files from within Teaming. Multiple sign-ins using WebDAV are triggered by the client, not by server software.

You can access WebDAV tools from within a Teaming folder, or from an individual entry.

- ♦ [“Accessing WebDAV from a Folder” on page 62](#)
- ♦ [“Accessing WebDAV from an Entry” on page 62](#)

Accessing WebDAV from a Folder

- 1 Navigate to the File folder where you want to use WebDAV.
- 2 In the Footer toolbar, click *View this folder as a WebDAV folder*.

Teaming invokes a WebDAV window. If the window is not operable, consult with the folder owner or administrator to ensure that the configuration supports WebDAV (folder filenames must be unique).

Accessing WebDAV from an Entry

Teaming enables you to use WebDAV to attach a file to an entry.

- 1 Navigate to and select the entry where you want to use WebDAV to create an attachment.
- 2 In the *Attachments* section of the entry, click *Access Attachments Using WebDAV*.
- 3 Navigate to and select the file that you want to attach.

5.1.7 Generating an Activity Report on a Folder

- 1 Navigate to the folder about which you want to generate the activity report.
- 2 In the Folder toolbar, click *Manage > Activity Reports*.
The Folder Activity page is displayed.
- 3 Specify the time period for which you want to generate the report.
- 4 Choose between the following options:
Report Workspace or Folder Activity: Select this option if you want to see how many views, adds, modifies, and deletes have been performed on entries within the folder. You can also select to view the individual users who have been active in the folder, and the actions they have performed.
Report on Workflow State: Select this option if you want to view a report on workflows in the folder. You can select to show the average time entries spent in each workflow state, or the number of entries that are currently in each state.
- 5 In the *Select the Folders for Reporting* section, navigate to and select the folders for which you want to generate the report. You can select multiple folders.
- 6 Click *OK*.
Teaming launches the report in a spreadsheet. For information regarding the columns in this spreadsheet, see [Section 6.9.1, “Activity Reports,” on page 86](#).

You can run activity reports on individual entries. For information on how to do this, see [Section 6.9, “Generating Reports about a Folder Entry,” on page 86](#).

5.1.8 Subscribing to E-Mail Notifications from a Folder

You can configure a folder to send you e-mail notifications to inform you about activity that takes place in the folder.

For information on how to subscribe to receive e-mail notifications from a folder, see [Section 2.12, “Subscribing to a Folder or Entry,” on page 36](#).

5.1.9 Setting Up a Folder to Receive Entries Via E-Mail

Before you can add e-mail and text message entries to a folder, as described in [Section 5.1.10, “Adding Entries to a Folder Via E-Mail,” on page 64](#), you first need to set up the folder to allow such entries.

Your Teaming administrator can disable this feature. If you have rights to add entries to a particular folder, but are unable to do so through your e-mail, as described in this section, contact your Teaming administrator.

- 1 Navigate to the folder where you want to define the URL.
- 2 Click *Manage > Configure*.
- 3 In the *Define a simple URL for this folder or workspace* section, enter the URL that you want to use to reference the folder in the *Define URL* field.
- 4 Click *Add*.

- 5 Select *Allow e-mail posts to this folder via the following addresses*.
- 6 Click *Apply*, then click *Close*.

You can now make entries to the folder via e-mail and text message. For information on how to do this, see [Section 5.1.10, “Adding Entries to a Folder Via E-Mail,” on page 64](#).

5.1.10 Adding Entries to a Folder Via E-Mail

Teaming enables you to e-mail entries into folders. This is useful if you don’t have access to the Teaming site and you still want to create an entry. You can also text-message entries into folders, so when you don’t have access to a computer or the Internet, you can still capture thoughts and contribute to conversations.

To e-mail entries into folders, you must have appropriate rights, and you must know the previously defined e-mail address for the folder.

If you are the folder owner and want to define an e-mail address for the folder, see [Section 5.1.9, “Setting Up a Folder to Receive Entries Via E-Mail,” on page 63](#) for instructions on how to do this.

To see the e-mail address of a folder:

- 1 Navigate to the folder where you want to add entries via e-mail.
- 2 Click the Footer toolbar, located at the bottom of the folder page.

In the *E-Mail Addresses* section of the provided table, the e-mail address of the folder is displayed.

This is the e-mail address that you use to make entries to the folder via e-mail.

5.1.11 Changing the Folder View

Teaming enables you to change the view of a folder. For example, if you are viewing your Calendar folder in the default Calendar view, you can change the view to the Task folder view. You can also change the default view of the folder, so no other options are available to those who want to view the folder.

Anyone who has access to a folder can change the view of the folder, if the folder owner or someone with appropriate rights has configured the folder to allow alternate folder views.

If you are the owner of a folder and you want to allow alternate views on a folder, or if you want to change the default view of a folder, see [“Managing Folder Views”](#) in the *Kablink Teaming 2.0 Advanced User Guide*.

To change the view of a folder after the folder owner has configured it to support alternate folder views:

- 1 Navigate to the folder where you want to change the view.
- 2 In the main sidebar, in the Folder Options section, click the *Folder View* drop-down list.

All of the folder views that have been enabled on the folder are displayed.

- 3 Click the view that you want to change the folder to.

The folder view is changed to the view that you specified.

5.1.12 Branding a Folder

Branding a folder is a good way to make the folder more unique and identifiable. When you brand a folder, the brand is applied to all sub-workspaces and sub-folders.

For more information on branding, see “[Branding a Folder or Workspace](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

5.2 Folder Tools

- ♦ [Section 5.2.1, “Using Filters,” on page 65](#)
- ♦ [Section 5.2.2, “Listing Entries and Pages,” on page 66](#)

5.2.1 Using Filters

Many types of folders in Kablink Teaming provide a filter that helps you quickly sift through information in your folder.

- ♦ [“Creating a Filter” on page 65](#)
- ♦ [“Applying an Existing Filter” on page 65](#)
- ♦ [“Modifying a Filter” on page 65](#)
- ♦ [“Deleting a Filter” on page 66](#)

Creating a Filter

In the *Filter* section, Teaming enables you to create multiple filters in your folder. You can easily apply those filters to help you quickly sift through your entries.

- 1 Navigate to the folder where you want to create the filter.
- 2 In the *Filter* section, click *Filters*.
- 3 Click *Add a New Filter*.

This form is nearly identical to the one used for advanced searches (see [Section 2.5.2, “Using Advanced Search,” on page 30](#) for information regarding the various fields in this form).

- 4 Click *OK*.

Applying an Existing Filter

- 1 Navigate to the Calendar folder where you have already created the filter that you want to apply.
- 2 In the *Filter* section, click the name of the filter.

The filter is applied to the folder.

After you apply a filter, items that do not match the filter criteria in that folder are not displayed in the folder listing. To clear the filter, click *None* in the Filter section.

Modifying a Filter

- 1 Navigate to the folder where you want to modify a filter that has already been created.
- 2 In the *Filter* section, click *Filters*.

- 3 In the *Personal Filters* section, click the drop-down list and select the filter that you want to modify.
- 4 Click *Modify*.
- 5 Make the modifications that you desire, then click *OK*.

Deleting a Filter

- 1 Navigate to the folder where you want to delete a filter that has already been created.
- 2 In the *Filter* section, click *Filters*.
- 3 In the *Personal Filters* section, click the drop-down list and select the filter that you want to delete.
- 4 Click *Delete*, then click *OK* to confirm that you want to delete the filter.

5.2.2 Listing Entries and Pages

Many types of folders in Teaming provide an Entry Listing toolbar that enables you to search for entries individually, or navigate among pages of listings. Some of these tools are useful only if there is more than one page of entries. The available tools are:

Go to An Entry: Specify the number (displayed in the # column) of the entry that you want to view, then click *Go*.

Previous/Next: Enables you to scroll through the pages of the folder.

Go to Page: Type a page number in this text box, then click *Go* to display the entries on that page of listings.

5.3 Choosing a Folder Type

Kablink Teaming provides various kinds of folders that enable you and your teams to accomplish specific tasks.

Many folder management functions are the same for all types of folders. However, each type of folder in Teaming performs special functions. This section describes how to manage and perform functions that are unique to each folder type.

- ♦ [Section 5.3.1, “Discussion,” on page 67](#)
- ♦ [Section 5.3.2, “Blog,” on page 68](#)
- ♦ [Section 5.3.3, “Calendar,” on page 69](#)
- ♦ [Section 5.3.4, “Guestbook,” on page 71](#)
- ♦ [Section 5.3.5, “File,” on page 71](#)
- ♦ [Section 5.3.6, “Milestone,” on page 72](#)
- ♦ [Section 5.3.7, “Micro-Blog,” on page 72](#)
- ♦ [Section 5.3.8, “Photo Album,” on page 73](#)
- ♦ [Section 5.3.9, “Survey,” on page 75](#)
- ♦ [Section 5.3.10, “Task,” on page 76](#)
- ♦ [Section 5.3.11, “Wiki,” on page 78](#)

5.3.1 Discussion

Use discussions as a way of obtaining comments and feedback to questions and thoughts that you might have. You can start general discussion threads in the Discussion folder in your personal workspace. For discussion threads that are more specific to a project or team, start the discussion thread in the Discussion folder of the appropriate workspace.

Starting a discussion thread is often more effective than sending individual users an e-mail, because other interested parties and knowledge holders can easily join the discussion, without waiting for the e-mail to be forwarded partway through the discussion.

By default, the Discussions folder is sorted with the most recent discussions appearing first in the list of discussion entries.

- ♦ [“Sorting Discussion Entries by Column Title” on page 67](#)
- ♦ [“Pinning Discussion Entries” on page 67](#)
- ♦ [“Viewing Discussion Entries” on page 67](#)

Sorting Discussion Entries by Column Title


You can organize your discussion entries by any of the column titles, which are *Entry Number (#)*, *Title*, *Author*, *State*, *Activity Date*, or *Rating*.

To sort discussion entries by column titles:

- 1 Click the title of the column that represents how you want to sort your discussions.
The *Sort* icon ▼ is displayed by the column title that represents how the discussions are being sorted.
- 2 Click the column title again to reverse the sort order for the discussions.

Pinning Discussion Entries

Teaming enables you to pin discussion entries, which makes them easy to view in the future by bringing them to the top of the list of discussion entries. This is like placing a bookmark on a discussion entry that you want to keep track of.

- 1 In a Discussion folder, click the gray *Pin* icon  next to a discussion entry that you are interested in.
The Pin icon changes from gray to orange. The next time the page refreshes, the discussion entry is brought to the top of the list of discussion entries. It remains at the top of the list until you click the *Pin* icon again, and un-pin the discussion entry.
You can pin multiple discussion entries. Pinned discussion entries are sorted alphabetically by title.

Viewing Discussion Entries

To view a discussion entry:

- 1 Click the title of the discussion entry.
The discussion entry is opened in-line in the discussion folder.

5.3.2 Blog

Blogs are a good way to express your thoughts about topics that are important to you. For example, if you are working on a project and are responsible for a certain aspect of that project, you can update your team on your individual progress by posting a blog in the Blog folder in the team workspace. Also, you can use the Blog folder in your personal workspace to post your professional credentials and skills, as described in [Section 1.5.2, “Presenting Your Professional Credentials,” on page 20](#).

- ♦ [“Using the Blog Toolbar” on page 68](#)
- ♦ [“Organizing Your Blog Folder” on page 68](#)

Using the Blog Toolbar

Unlike other folder views, the Blog folder provides the Blog toolbar on each entry. The Blog toolbar is displayed at the bottom of any blog entry, and enables you to do several actions without opening the entry:

- ♦ **Add Comment:** Enables you to quickly add a comment to an entry.
- ♦ **View Comments:** Opens a list containing all of the comments that have been made on the entry.
- ♦ **Send to Friend:** Enables you to e-mail the blog entry to anybody who might be interested in viewing it.
- ♦ **Subscribe:** Enables you to send notifications to yourself when activity takes place in this entry. For more information, see [Section 2.12, “Subscribing to a Folder or Entry,” on page 36](#).

Organizing Your Blog Folder

There are various ways that you can organize your Blog folder.

- ♦ [“Creating a New Blog Page” on page 68](#)
- ♦ [“Sorting Blog Entries” on page 68](#)
- ♦ [“Using the Archives Section” on page 69](#)

Creating a New Blog Page

You can organize your Blog folder into separate Blog pages. Blog pages are displayed in the Blog sidebar, located in the right section of the Blog folder, above the *Archives* section. Also, in the main sidebar, in the *Workspace* section, you can expand your Blog folder to view your Blog pages.

To create a new Blog page:

- 1 Click *New Blog Page* in the Folder Entry toolbar.
The Add New Folder page is displayed.
- 2 In the *Folder Title* field, specify the name of the new Blog page that you want to create.
- 3 Click *OK*.

Sorting Blog Entries

You can sort your blog entries by *Entry Number (#)*, *Activity Date*, *Author*, *State*, or *Title*.

To sort blog entries:

- 1 Click the *Sort by* drop-down list in the Folder Entry toolbar.
- 2 Select how you want to sort the entries in your Blog folder.

Using the Archives Section

The Blog sidebar in the Blog folder includes an *Archives* section that displays each month of the year that blogs were created. When you first enter a Blog folder, all of the blog entries are displayed in the main viewing area. Selecting an archived month simply filters the entries in the folder to display only entries that were created in that month.

Using the *Archives* section, you can quickly navigate to a specific blog entry if you know the month when it was created. Or, you can view all of the blog entries that were created in any given month.

- 1 In the *Archives* section, click the month that the blog was created.
The most recent month is displayed at the top of the *Archives* section.
In the main viewing area of the Blog folder, Teaming displays all of the blog entries that were created in that month.
- 2 (Optional) You can further navigate to the blog you are looking for by clicking the name of the Blog page where the blog is stored.
The blog is displayed in the main viewing area.

5.3.3 Calendar

Teaming enables you to create a Calendar folder in any workspace that you desire. You can maintain a personal calendar in your personal workspace, and then add separate calendars in your team workspaces to keep track of events that are specific to that team.

- ♦ [“Customizing Your Calendar Folder” on page 69](#)
- ♦ [“Synchronizing Teaming Calendars” on page 70](#)
- ♦ [“Viewing Today’s Calendar Items from All of Your Tracked Calendars” on page 71](#)
- ♦ [“Synchronizing Your Calendar with a Desktop Application” on page 71](#)


Customizing Your Calendar Folder

- ♦ [“Customizing Your Calendar Folder With The Date Toolbar” on page 69](#)
- ♦ [“Other Customizations” on page 70](#)

Customizing Your Calendar Folder With The Date Toolbar

The Date toolbar in Teaming enables you to customize the Calendar folder view in various ways.

- ♦ Specify whether Teaming should display all hours in the day, or only regular working hours.
- ♦ Specify the amount of time displayed on a single folder page (1 day, 3 days, 5 days, 1 full week, 2 weeks, or a month).
- ♦ Use the left-arrow and right-arrow icons to specify the next or previous folder page. For example, if you are currently viewing three days of information, clicking the arrows shows you the previous or next three days of information.

- ♦ Click the *Calendar Settings* icon  to specify the following options:
 - ♦ The day of the week that the calendar starts. (Saturday, Sunday, or Monday).
 - ♦ The time your work day starts.
- ♦ Use the calendar applet to display the month or day. After you select a new month to view, be sure to click *OK* to refresh the folder page.

Other Customizations

In the Folder Entry toolbar, you can select *Show All Entries By* if you want to organize your entries by *Creation* or *Last Activity*.

Synchronizing Teaming Calendars

Teaming enables you to synchronize the Teaming calendars of your choice, and display them in a single, summarized calendar in the Accessory Panel. This eliminates the need to check multiple calendars.

- 1 Navigate to the workspace or folder where you want to display the calendar.
- 2 Click the *Accessory Panel* drop-down list.
- 3 Click *Add an Accessory*.
- 4 In the *Accessory Scope* section, select where you want the accessory to be displayed.

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.

- 5 In the *Accessory Type* section, select *Calendar Summary*.
- 6 Click *OK*.

The Accessory Setup page is displayed.

- 7 In the *Title* field, provide a title for the calendar.
- 8 In the *Display Style* section, select whether you want the calendar to have a border.
- 9 In the *Select the Calendar Folder(s) to be Shown* section, navigate the workspace tree and select all of the calendars that you want to be included in the Calendar Summary accessory. Teaming takes the calendar events from all of the Calendar folders that you select here, and displays them in a single, convenient calendar in the Accessory Panel.

- 10 Click *Apply > Close*.

The Calendar Summary accessory is displayed in the Accessory Panel on the pages where you configured it to be shown, as explained in [Step 4](#).

Viewing Today's Calendar Items from All of Your Tracked Calendars

Teaming enables you to view all of your calendar events for the current day, in one synchronized view. This view displays events from the calendars that you are tracking, and displays only those events for which you are scheduled.

- 1 Navigate to the home page of your personal workspace.
- 2 Click the *Tasks and Calendars* tab.

The right section of the page displays today's schedule with all of the calendar events from all of your tracked calendars.

Synchronizing Your Calendar with a Desktop Application

Teaming provides iCal URLs for Calendar folders, so you can synchronize your Teaming Calendar folder to your desktop application.

For information on using iCal to synchronize your calendar with a desktop application, see [Section 2.15, "Synchronizing Teaming Task and Calendar Folders to a Desktop Calendar Application," on page 39](#).

5.3.4 Guestbook

The Guestbook folder in Teaming is a place to store all of your guestbook entries. By default, users can sign your Guestbook in the *Overview* tab of the home page of your personal workspace. This is a quick way for your friends and co-workers to communicate with you.

To sign another user's Guestbook:

- 1 Navigate to the user's Guestbook folder.
- 2 Click the *Overview* tab.
- 3 In the upper right corner of the folder, click *Sign the guestbook*.
- 4 In the *Title* section, provide a title for signature.
- 5 In the *Description* section, compose your message.
- 6 (Optional) In the *Attachments* section, add any attachments that you desire.
- 7 Click *OK*.

5.3.5 File

File folders in Teaming make it easy to store and keep track of your files. You can store personal files in the File folder in your personal workspace, and team-related files in your individual team folders. This makes it easy to share files with your teammates and others who might be interested in viewing them.

- ♦ ["Adjusting the Column Width" on page 72](#)
- ♦ ["Showing and Hiding Columns" on page 72](#)

Adjusting the Column Width

Teaming enables you to adjust the column width of the table in the File folder.

- 1 Click and drag the arrow icons, located at the top of each column.
- 2 When you have reached the desired width, release the mouse.

Showing and Hiding Columns

Teaming enables you to show or hide table columns in the File folder. The available columns are:

- ♦ **Entry Number (#):** Displays the number of the entry (“1” meaning that the entry was created first)
- ♦ **Title:** Displays the title of the entry.
- ♦ **Author:** Displays the author of the entry.
- ♦ **Comments or Replies:** Displays how many comments or replies have been made on the entry.
- ♦ **Size:** Displays the file size of the entry.
- ♦ **Download:** Enables you to download the file to your local workstation.
- ♦ **VIEW:** Enables you to view the file in an HTML format.
- ♦ **State:** Shows the workflow state of the file.
- ♦ **Activity Date:** Displays when the entry was last modified or commented on.
- ♦ **Rating:** Displays the rating that users have given the entry.
- ♦ **VIEW:** Enables you to view the file in an HTML format.

To show or hide table columns in the File folder:

- 1 Navigate to the File folder where you want to show or hide the table columns.
- 2 In the main sidebar, click *Folder Options > Configure Columns*.
- 3 Select the columns that you want to show, and deselect the columns that you want to hide.
- 4 (Optional) Select *Set the default folder columns for everyone* if you want all users to see only the columns that you have selected.
- 5 Click *OK*.

5.3.6 Milestone

Milestone folders track 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. For more information, see [Section 4.5, “Managing a Project Management Workspace,” on page 58](#).

5.3.7 Micro-Blog

The Micro-Blog folder in Teaming is a place to store all of your micro-blog entries. Use micro-blog entries to display your status to your co-workers. You can navigate to someone else’s Micro-Blog folder to see what they have been working on, and possibly provide help by sharing your knowledge and experience.

For more information on the Micro-Blog feature, see [Section 2.10, “Using Micro-Blogs,” on page 34](#).

5.3.8 Photo Album

Photo albums store and display pictures. You can store your personal photos in the Photo Album folder in your personal workspace, and team-related photos in the Photo Album folder of the team workspace.

- ♦ “Organizing Your Photo Album” on page 73
- ♦ “Synchronizing Photo Albums” on page 74
- ♦ “Viewing and Managing Photo Entries” on page 74

Organizing Your Photo Album

- ♦ “Creating New Photo Albums within the Folder” on page 73
- ♦ “Sorting Photo Entries” on page 73
- ♦ “Using the Archives Section” on page 73

Creating New Photo Albums within the Folder

You can organize your Photo Album folder into separate photo albums. Photo albums are displayed in the Photo Album sidebar, located in the right section of the Photo Album folder. Also, in the *Workspace* section of the main sidebar, you can expand your Photo Album folder to view all of your photo albums in the folder.

To create a new photo album in your Photo Album folder:

- 1 Click *New Photo Album* in the Folder Entry toolbar.
The Add New Folder page is displayed.
- 2 In the *Folder Title* field, specify the name of the new photo album that you want to create.
- 3 Click *OK*.

Sorting Photo Entries

You can organize your photo album entries by *Activity Date*, *Creation Date*, or *Title*.

To sort photo album entries:

- 1 Click the *Sort by* drop-down list in the Folder Entry toolbar.
- 2 Select how you want to sort the entries in your Photo Album folder.

Using the Archives Section

The Photo Album sidebar in the Photo Album folder includes an *Archives* section that displays each month of the year that photos were created. When you first enter a Photo Album folder, all of the photo album entries are displayed in the main viewing area. Selecting an archived month simply filters the entries in the folder to display only entries that were created in that month.

Using the *Archives* section, you can quickly navigate to a specific photo entry if you know the month when it was created. Or, you can view all of the photo entries that were created in any given month.

- 1 In the *Archives* section, click the month when the photo was created.
The most recent month is displayed at the top of the *Archives* section.

In the main viewing area of the Photo Album folder, Teaming displays all of the photo entries that were created in that month.

- 2 (Optional) You can further navigate to the photo entry you are looking for by clicking the name of the Photo Album where the photo entry is stored.

The photo entry is displayed in the main viewing area.

Synchronizing Photo Albums

Teaming enables you to synchronize the Teaming photo albums of your choice, and display them in a single, summarized photo album (called a Photo Gallery) in the Accessory Panel.

- 1 Navigate to the workspace or folder where you want to display the Photo Gallery.
- 2 Click the *Accessory Panel* drop-down list.
- 3 Click *Add an Accessory*.
- 4 In the *Accessory Scope* section, select where you want the accessory to be displayed.

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.

- 5 In the *Accessory Type* section, select *Photo Gallery*.
- 6 Click *OK*.

The Accessory Setup page is displayed.

- 7 In the *Title* field, provide a title for the photo gallery.
- 8 In the *Display Style* section, select whether you want the photo gallery to have a border.
- 9 In the *Select the Photo Album(s) to be Shown* section, navigate the workspace tree and select all of the photo albums that you want to be included in the Photo Gallery accessory.

Teaming takes the photos from all of the Photo Album folders that you select here, and displays them in a single, convenient Photo Gallery in the Accessory Panel.

- 10 Click *Apply > Close*.

The Photo Gallery accessory is displayed in the Accessory Panel on the pages where you configured it to be displayed, as explained in [Step 4](#).

Viewing and Managing Photo Entries

- ♦ [“Viewing Photos” on page 74](#)
- ♦ [“Managing Photo Entries” on page 75](#)

Viewing Photos

To view a photo in a full-sized view in a separate window, click the thumbnail picture.

To scroll through an album that contains multiple photos, simply click the navigation arrows.

Managing Photo Entries

To manage a photo entry, including deleting, modifying, commenting, etc., click the linked title of the photo entry.

5.3.9 Survey

Survey folders store surveys that you or other Teaming users have created. Surveys enable you to poll team members, or any other Teaming users, about issues that are important to you, your team, or your entire organization.

- ♦ “Participating in a Survey” on page 75
- ♦ “Creating a Survey” on page 75
- ♦ “Checking the Results of a Survey” on page 76

Participating in a Survey

- 1 Navigate to the Survey folder that contains the survey that you want to participate in.
- 2 Click the entry title of the survey.
- 3 Provide answers to the survey questions, then click *Vote*.

Creating a Survey

- 1 Navigate to the Survey folder where you want to create the survey.
- 2 Click *Add Survey* in the Folder Entry toolbar.
The Survey page is launched.
- 3 Fill in the *Title*, *Description*, and *Attachments* sections as described in [Section 6.1.1, “Filling in the Add Entry Form,” on page 82](#).
- 4 In the *Due Date* section, specify the date when you want to stop all voting on the survey. After the date that you specify, users cannot cast a vote.
- 5 Specify the following access control settings:

Who Can See Vote Results Before Due Time: When users have access to view the vote results before the survey is due, they can see how other participants have voted so far. You can enable all users to have this ability, the moderator and those users who have already voted, or only the moderator.

Who Can See Vote Results After Due Time: When users have access to view the vote results after the survey is due, they can see how other participants have voted, but only after they have cast a vote and the voting is closed. You can enable all users to have this ability, the moderator and those users who have voted, or only the moderator.

Who Can See Who Has Voted and How: When users have access to see who has voted and how, they can see how other individual users have voted. Using this option is not recommended if your users want their votes to remain confidential. You can enable all users to have this ability, the moderator and those users who have voted, or only the moderator.

Allow Voters to Change/Remove Their Votes: Select this option if you want to grant users the ability to change or remove their votes before the survey is due. Users who are logged in as Guest cannot have this ability.

- 6 Select one of the following options for the first question of your survey:
 - ♦ **Multiple Choice: Multiple Answers:** Adds a multiple-choice question, and enables users to select more than one answer.
 - ♦ **Multiple Choice: Single Answer:** Adds a multiple-choice question, and restricts users to only one answer.
 - ♦ **Written Reply:** Adds a written reply question, and provides users with a field where they can specify their written response.
- 7 (Optional) Select *Answer to this question is required*, if you want to require users to answer the question.
- 8 (Optional) Click *Add More Answers*, if you want to add more answer possibilities for a multiple-choice question. (This option does not exist for Written Reply questions.)
- 9 Repeat [Step 6](#) through [Step 8](#) to add additional questions to your survey.
- 10 Click *OK*.

Checking the Results of a Survey

After you have voted, you can check the results by viewing the entry again.

- 1 Navigate to and open the survey where you want to check the voting results.
- 2 Click *View Voting Details*, located near the bottom of the survey entry.

Teaming displays the percentage of votes cast for each survey question.

5.3.10 Task

Task folders keep track of the progress made in completing work assignments. Teaming enables you to create a Task folder in any workspace that you desire. You can maintain a personal Task folder in your personal workspace, and then add separate Task folders in your team workspaces to keep track of tasks that are specific to that team.

- ♦ [“Changing the View of Your Task Folder” on page 76](#)
- ♦ [“Synchronizing the Teaming Task Folders of Your Choice” on page 77](#)
- ♦ [“Viewing Your Personal, Team, and Group Tasks in One Location” on page 77](#)
- ♦ [“Importing Tasks” on page 78](#)

Changing the View of Your Task Folder

The View toolbar enables you to choose the kinds of tasks that you want to display in the task list, according to the following categories:

- ♦ **Closed:** Displays tasks that have the status of Closed.
- ♦ **Today:** Displays tasks that have a due date of today.
- ♦ **Week:** Displays tasks that have a due date sometime in the next seven days.
- ♦ **Month:** Displays tasks that have a due date sometime in the next 30 days.
- ♦ **All Active:** Displays tasks that are currently active.
- ♦ **All Entries:** Displays all tasks.

Synchronizing the Teaming Task Folders of Your Choice

Teaming enables you to synchronize the Teaming Task folders of your choice, and display them in a single, summarized task list in the Accessory Panel. You can display tasks that are assigned to specific users, groups, or teams.

- 1 Navigate to the page where you want to display the task list.
- 2 Click the *Accessory Panel* drop-down list.
- 3 Click *Add an Accessory*.
- 4 In the *Accessory Scope* section, select where you want the accessory to be displayed.

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.

- 5 In the Accessory Type section, select *Task Summary*.
- 6 Click *OK*.

The Accessory Setup page is displayed.

- 7 In the *Title* field, provide a title for the task list.
- 8 In the *Display Style* section, select whether you want the task list to have a border.
- 9 In the *# of Results to be Shown* section, specify how many results you want to display at any one time in the task list.
- 10 In the *Show Only the Tasks Assigned To* section, specify the specific users, groups, or teams whose tasks you want to display.
- 11 In the *Select the Task Folder(s) to be Shown* section, navigate the workspace tree and select all of the Task folders that you want to be included in the task list.

Teaming takes the tasks from all of the Task folders that you select here, and displays them in a single, convenient task list in the Accessory Panel.

- 12 Click *Apply > Close*.

The Task Summary accessory is displayed in the Accessory Panel on the pages where you configured it to be shown, as explained in [Step 4](#).

Viewing Your Personal, Team, and Group Tasks in One Location

Teaming provides a view that displays all of the tasks that are assigned to you, whether they are assigned personally to you, or assigned to a group or team of which you are a member.

- 1 Navigate to the home page of your personal workspace.
- 2 Click the *Tasks and Calendars* tab.

The left section of the page displays all of the tasks that assigned to you, whether they are assigned personally to you, or assigned to a group or team of which you are a member.

- 3 Select whether you want to view tasks that are due within the next two weeks, or if you want to view all tasks.

Importing Tasks

Teaming enables you to import tasks from other software applications. You can import tasks from Outlook or from other applications that export to files of .ical, .ics, .ifb, and .icalendar formats.

You can import tasks as a single file, or you can import a list of tasks from a URL.

Importing Tasks as a Single File

- 1 Navigate to the Task folder where you want to import the task.
- 2 In the main sidebar, click *Folder Options > Import Tasks*.
- 3 Click *Import Tasks from a File*.
- 4 Click *Browse*, then browse to and select the task that you want to import.
- 5 Click *Import from File*.

Importing Tasks from a URL

- 1 Navigate to the Task folder where you want to import the task.
- 2 In the main sidebar, click *Folder Options > Import Tasks*.
- 3 Click *Import Tasks from a URL*.
- 4 In the provided field, specify the URL where there is a list of tasks that you want to import.
- 5 Click *OK*.

5.3.11 Wiki

Wiki folders contain wiki entries. A wiki is a set of related entries coauthored by folder participants. For example, the best known wiki on the Internet is Wikipedia. Other examples of possible wiki content are glossaries, and policies or procedures.

- ♦ “Organizing Your Wiki Folder” on page 78
- ♦ “Formatting Your Wiki Entry” on page 80

Organizing Your Wiki Folder

There are various ways that you can organize your Wiki folder.

- ♦ “Setting a Wiki Home Page” on page 78
- ♦ “Navigating to Your Wiki Home Page” on page 79
- ♦ “Creating a New Wiki Topic” on page 79
- ♦ “Sorting Wiki Entries” on page 79
- ♦ “Finding a Wiki Entry” on page 79

Setting a Wiki Home Page

Teaming enables you to set an entry to be the wiki home page for any Wiki folder (Wiki Topic).

- 1 Locate and display the entry that you want to set as the home page for your Wiki Topic.

- 2 Click *Set Wiki Home Page* in the Entry toolbar.

The entry is now set as the home page for the Wiki Topic.

Navigating to Your Wiki Home Page

- 1 Navigate to the Wiki folder (Wiki Topic) where you want to display the wiki home page.
- 2 Click *Wiki Home Page* in the Wiki sidebar.

The wiki home page for the Wiki Topic is displayed in the main viewing window.

Creating a New Wiki Topic

You can organize your Wiki entries into separate Wiki folders (Wiki Topics). Wiki Topics are displayed in the Wiki sidebar, in the *Wiki Topics* section. Also, in the *Workspace* section of the main sidebar, you can expand your Wiki folder to view your Wiki Topics.

To create a new Wiki Topic:

- 1 Click *New Wiki Topic* in the Folder Entry toolbar.
The Add New Folder page is displayed.
- 2 In the *Folder Title* field, specify the name of the new Wiki Topic that you want to create.
- 3 Click *OK*.

or

- 1 In the Wiki folder where you want to create the new Wiki Topic, click *Manage > Configure* in the Folder toolbar.
The Add New Folder page is displayed.
- 2 In the *Folder Title* field, specify the name of the new Wiki Topic that you want to create.
- 3 Click *OK*.

Sorting Wiki Entries

You can organize your wiki entries by *Activity Date*, *Creation Date*, or *Title*.

To sort wiki entries:

- 1 Click the *Sort by* drop-down list in the Folder Entry toolbar.
- 2 Select how you want to sort the entries in your Wiki folder.

Finding a Wiki Entry

Wiki Entries are stored in Wiki folders (Wiki Topics). When you are looking for a Wiki Entry, first select the Wiki Topic in the *Wiki Topics* section of the Wiki sidebar where the entry is stored. Then, click the entry in the *Wiki Entries* section of the Wiki sidebar.

For Wiki Topics that contain many entries, you can use the Find a Page feature in the Wiki sidebar.

- 1 In the Wiki sidebar, click the Wiki Topic that contains the Wiki Entry that you are searching for.
- 2 In the *Find a Page* field, begin typing the name of the entry that you are looking for. Click the name of the entry when it appears in the drop-down list.

When you are working with a wiki entry, it can be helpful to review edits from your teammates. For information on how to check the edit history of an entry, see [Section 6.9.2, “Edit History Reports,” on page 87](#).

Formatting Your Wiki Entry

- ♦ [“Creating Sections and Subsections” on page 80](#)
- ♦ [“Linking to Another Wiki Entry” on page 80](#)

Creating Sections and Subsections

[Table 5-1](#) shows how you can create sections and subsections in a Wiki Entry.

Table 5-1 *Sections and Subsections*

Example	Description
<code>==Section name==</code>	Creates a section heading in the Wiki Entry.
<code>===Subsection name===</code>	Creates a subsection heading in the Wiki Entry.

Linking to Another Wiki Entry

If you know the exact name of the entry that you want to link to, you can enter `[[entry name]]` in the *Description* section of the entry to create a link to that entry.

Working With Folder Entries

6

Entries in Kablink® Teaming are individual sections or parts that are used to populate folders with information.

- ♦ [Section 6.1, “Creating a Folder Entry,” on page 81](#)
- ♦ [Section 6.2, “Linking within a Folder Entry,” on page 83](#)
- ♦ [Section 6.3, “Commenting on a Folder Entry,” on page 84](#)
- ♦ [Section 6.4, “Modifying a Folder Entry,” on page 84](#)
- ♦ [Section 6.5, “Reserving a Folder Entry,” on page 85](#)
- ♦ [Section 6.6, “Moving a Folder Entry,” on page 85](#)
- ♦ [Section 6.7, “Copying a Folder Entry,” on page 86](#)
- ♦ [Section 6.8, “Deleting a Folder Entry,” on page 86](#)
- ♦ [Section 6.9, “Generating Reports about a Folder Entry,” on page 86](#)
- ♦ [Section 6.10, “Notifying Others about a Folder Entry,” on page 88](#)
- ♦ [Section 6.11, “Subscribing to a Folder Entry,” on page 89](#)
- ♦ [Section 6.12, “Tagging a Folder Entry,” on page 89](#)
- ♦ [Section 6.13, “Attaching Files to a Folder Entry,” on page 90](#)
- ♦ [Section 6.14, “Rating a Folder Entry,” on page 91](#)
- ♦ [Section 6.15, “Printing a Folder Entry,” on page 91](#)
- ♦ [Section 6.16, “Using Version Control With Files,” on page 91](#)
- ♦ [Section 6.17, “Enabling Alternate Folder Entry Types,” on page 92](#)
- ♦ [Section 6.18, “Creating Custom Folder Entry Forms,” on page 93](#)
- ♦ [Section 6.19, “Displaying Folder Entries on a Landing Page,” on page 93](#)

6.1 Creating a Folder Entry

Kablink Teaming enables you to create folder entries in any folder where you have appropriate rights.

- 1 Navigate to the folder where you want to create the entry.
- 2 In the Folder Entry toolbar, click the appropriate item to add the entry. For example, to add a blog entry in the Blog folder, click *Add Blog Entry*.
The Add Entry page is launched.
- 3 Specify the appropriate information in the Add Entry page. For more detailed information on the fields, see [Section 6.1.1, “Filling in the Add Entry Form,” on page 82](#).
- 4 Click *OK*.
The entry is added to the folder.

6.1.1 Filling in the Add Entry Form

Although the process for creating a folder entry is similar for each type of entry (File entry, Calendar entry, Discussion entry, etc.), the Add Entry form can vary considerably.

Because Teaming is highly customizable, field names in the Add Entry form can be defined by Teaming administrators and other Teaming users who create forms, and therefore can be called anything. This section contains a list of named fields for the various default entry types. For more information on creating custom forms, see “[Designing Custom Folder Entry Forms](#)” in the *Kablink Teaming 2.0 Advanced User Guide*

Title: Provide a title for the entry.

Location: Specify the location for the event.

Description: Provide a description of the entry. This is the body of the entry, and is where you add the main content.

Event/Time Period: Specify the start and end time, whether you want the entry to adjust for the time zone of attendees, how you want your status to be displayed during this event (*Free, Busy, Tentative, or Out of Office*), and if you want the entry to repeat (*Does not repeat, Daily, Weekly, Monthly, or Yearly*).

Priority: Specify the priority of the entry.

Attendee: Specify individual attendees whom you want to invite to the calendar event.

Clipboard User Names: Use names that are on your clipboard to invite users to the event.

Groups: Specify groups that you want to be associated with the entry. When you specify a group, each member of the group is associated with the entry. For example, if you are scheduling a meeting and you specify a group to attend the meeting, each member of the group is considered an attendee.

Teams: Specify teams that you want to be associated with the entry. When you specify a team, each member of the team is associated with the entry. For example, if you are assigning a task to a team, each member of the team is responsible for completing the task.

Send an E-Mail Notification: Select this option if you want Teaming to send an e-mail notification to all of the users, groups, or teams that you associated with the entry.

Status: Specify a percentage to indicate how complete a task entry is.

Completed: Select this option if you want Teaming to send an e-mail notification to all of the users, groups, or teams that you associated with the entry.

Attachments: Enables you to browse your file system and attach a file to the entry. Click *Add more files* to add additional attachments.

Photo: Enables you to browse to and upload a photo.

Due Date: The last day the entry is active.

Survey: Enables you to set parameters for your survey, such as whether to allow multiple answers, single answers, or written replies, who can see the vote results before the survey is due, who can see vote results after the survey is due, and who can see participant names. It also provides an option to allow voters to change or remove their votes.

For more detailed instructions on creating a survey, see “[Creating a Survey](#)” on page 75.

Subscribe to This Entry: You can configure Teaming to send you notifications when activity takes place in this entry. For more information, see [Section 2.12, “Subscribing to a Folder or Entry,”](#) on page 36.


Send E-Mail When Entry is Submitted: To ensure that certain co-workers are aware of your entry, you can send them an e-mail directly from Teaming, notifying them that an entry has been created. For more information, see [Section 8.4, “Filling Out the Send E-Mail Page,”](#) on page 109.

6.2 Linking within a Folder Entry

When creating an entry, you can include a link to another entry in your Kablink Teaming site, or to anywhere else on the Internet.

- ♦ [Section 6.2.1, “Linking to an Entry in the Current Folder,”](#) on page 83
- ♦ [Section 6.2.2, “Linking to an Entry in Another Folder,”](#) on page 83
- ♦ [Section 6.2.3, “Linking to an External Page on the Web,”](#) on page 84

6.2.1 Linking to an Entry in the Current Folder


- 1 In the *Description* section of the Add entry form, click the *Apply link* icon , located at the end of the row of buttons in the HTML editor.

Teaming displays a window that allows you to specify the entry to which you want to link.

- 2 In the *Page name to link to* field, do any of the following:
 - ♦ Type the exact page title.
 - ♦ Click *Find* next to the field, start typing the name of the page, and select the appropriate title from the drop-down list.
 - ♦ Use the Permalink feature that is found at the bottom of every Kablink Teaming page. To do this, click the *Permalink* link in the Footer toolbar at the bottom of the page that you want to link to, copy the URL, and paste the URL into the *Page name to link to* field.
- 3 Click *Insert*.

If you know the exact name of the entry that you want to link to, you can enter `[[entry name]]` in the *Description* section of the entry to create a link to that entry.

6.2.2 Linking to an Entry in Another Folder

- 1 In the *Description* section of the Add entry form, click the *Apply link* icon , located at the end of the row of buttons in the HTML editor.


Teaming displays a window that allows you to specify the entry to which you want to link.

- 2 Click the *Change link*.
- 3 In the provided field, start typing the name of the folder that contains the entry that you want to link to.
- 4 When the desired folder appears in the type-to-find list, click it.
- 5 In the *Page name to link to* field, specify the complete name of the entry that you want to link to, or click *Find* to use the type-to-find functionality.

- 6 After you have finished typing the name, or after you have clicked the name in the type-to-find drop-down list, click *Insert*.

The linked title of your chosen entry is inserted into the *Description* box.

6.2.3 Linking to an External Page on the Web

- 1 In the *Description* section of the Add entry form, select the text that you want to convert into a link.
- 2 Click the *Insert/edit link* icon .
- The Insert/edit link window is displayed.
- 3 In the *Link URL* field, specify the URL of the page that you want the link to.
- 4 Fill in the following fields:
 - Target:** Specify whether you want to open the link in the same window, or open the link in a new window.
 - Title:** Specify a title for the link.
 - Class:** Specify how big you want the link to appear.If you leave this field blank, 12px is automatically selected. This is the standard setting.
- 5 Click *Insert*.

6.3 Commenting on a Folder Entry

People often post a folder entry to generate ideas and obtain feedback. Kablink Teaming enables you to comment on any type of entry, so you can share your ideas and provide input.

- 1 Navigate to the entry where you want to make a comment.
- 2 Select the entry, then click *Comment* in the Entry toolbar.
- 3 In the *Description* field, specify your comment.
- 4 (Optional) Use the *Attachments* section to attach a file to your comment.
- 5 Click *OK*.

Your comment is displayed as the last comment in the list of comments.

For Blog entries, you can use the Blog Toolbar to make comments. For information on using the Blog Toolbar, see [“Using the Blog Toolbar” on page 68](#).

6.4 Modifying a Folder Entry

If you have appropriate rights, Kablink Teaming enables you to modify a folder entry after it has been created. You can modify all sections of an entry, or the Description section only.

- ♦ [Section 6.4.1, “Modifying All Sections of an Entry,” on page 84](#)
- ♦ [Section 6.4.2, “Modifying the Description Section of an Entry,” on page 85](#)

6.4.1 Modifying All Sections of an Entry

- 1 Navigate to the entry that you want to modify.

- 2 Select the entry, then click *Modify* in the Entry toolbar.
- 3 Modify the entry as necessary.

You can modify the title or description of the entry. You can also **subscribe to the entry**, or **send an e-mail when the entry is submitted**.
- 4 When you have finished modifying the entry, click *OK*.

6.4.2 Modifying the Description Section of an Entry

- 1 Navigate to the entry that you want to modify.
- 2 In the lower right corner of the *Description* section, click *Edit*.
- 3 Use the provided HTML editor to modify the *Description* section.
- 4 Click *OK*.

6.5 Reserving a Folder Entry

When you reserve a folder entry in Kablink Teaming, other users who might want to modify, move, copy, or delete the entry are unable to do so for as long as you have the entry reserved.

This does not apply to users accessing the entry through WebDAV.

- 1 Navigate to the entry that you want to reserve.
- 2 Select the entry, then click *Reserve* in the Entry toolbar.

The entry is now reserved for your use. Nobody else can modify, move, copy, or delete the entry.

When you are finished modifying the entry, click *Unreserve* in the Entry toolbar to make it available to be modified by other users.

6.6 Moving a Folder Entry

Kablink Teaming enables you to move a folder entry into any folder where you have appropriate rights.

- 1 Navigate to the entry that you want to move.
- 2 Select the entry, then click *Move* in the Entry toolbar.
- 3 In the *Select the Destination Folder or Workspace* section, use the Workspace tree to navigate to the folder where you want to move the entry.
- 4 Click the linked title of the folder where you want to move the entry.

The *Current Save Location* section shows you the path where you have selected to move the entry.
- 5 To move the entry to the location specified, click *OK*.

6.7 Copying a Folder Entry

Kablink Teaming enables you to copy a folder entry from one folder and paste it into any folder where you have appropriate rights.

- 1 Navigate to the entry that you want to copy.
- 2 Select the entry, then click *Copy* in the Entry toolbar.
- 3 In the *Select the Destination Folder or Workspace* section, use the Workspace tree to navigate to the folder that you want to copy the entry into.
- 4 Click the linked title of the folder that you want to copy the entry into.
The *Current Save Location* section shows you the path where you have selected to copy the entry.
- 5 To copy the entry into the location specified, click *OK*.

6.8 Deleting a Folder Entry

You can delete a folder entry wherever you have appropriate rights to do so.

- 1 Navigate to and select the entry that you want to delete.
- 2 Select the entry, then click *Delete* in the Entry toolbar.
- 3 Kablink Teaming asks you if you really want to delete the entry. Click *OK*.

6.9 Generating Reports about a Folder Entry

Kablink Teaming enables you to generate reports about a folder entry.

- 1 Navigate to the entry that you want to generate a report about.
- 2 Select the entry, then click *Reports* in the Entry toolbar, then select the type of report that you want to generate.

You can generate the following kinds of reports:

- ♦ [Section 6.9.1, “Activity Reports,” on page 86](#)
- ♦ [Section 6.9.2, “Edit History Reports,” on page 87](#)
- ♦ [Section 6.9.3, “Workflow History Reports,” on page 87](#)

For information on how to change the default application that Teaming uses to view these reports, see [Section B.7.1, “Changing the Default Editor Settings for a Single File Type,” on page 123](#).

6.9.1 Activity Reports

Activity reports contain the following kinds of information:

- ♦ **User:** Shows the users who have had some kind of activity in the entry.
- ♦ **Views:** Displays how many times the user has viewed the entry.
- ♦ **Adds:** Displays who created the entry.
- ♦ **Edits:** Displays who has edited the entry.

- ♦ **Deletes:** Displays who deleted the entry. However, this is only useful when you run the report at the folder level, as described in [Section 5.1.7, “Generating an Activity Report on a Folder,” on page 63](#).

6.9.2 Edit History Reports

Edit History Reports enable you to generate reports about the *Title* and *Description* sections of folder entries. You cannot generate reports about documents that are attached to folder entries.

Edit History Reports enable you to accomplish the following tasks:

- ♦ [“Viewing Version Information” on page 87](#)
- ♦ [“Comparing Versions of an Entry” on page 87](#)

Viewing Version Information

Edit History reports contain version information about the entry, such as when it was created, when it was edited, and the additions and modifications that were made to it. You cannot view version information about documents that are attached to the entry.

In the Edit History page, the *Data* column lists a date for each time the entry was edited.

To view what modifications were made on a specific date:

- 1 In the *Data* column, click the date for which you want to view the modifications.
The *Title* and *Description* sections of the entry are displayed, showing what the entry looked like after the modifications were made on the specific date.

Comparing Versions of an Entry

The Edit History report in Teaming enables you to compare the *Title* and *Description* fields of two versions of an entry. You cannot compare versions of documents that are attached to entries.

- 1 In the Edit History page, in the *Version* column, select the left radio button of the first version that you want to compare, then select the right radio button of the second version that you want to compare.
- 2 Click *Compare*.
Teaming displays the additions underlined in green, and the deletions marked with strikeout in red.

6.9.3 Workflow History Reports

Workflow history reports contain the following kinds of information:

- ♦ **Event Number:** Displays the order of the actions that have been performed concerning the workflow.
- ♦ **Modify Date:** Displays the date the workflow was modified
- ♦ **Modified By:** Displays the user who modified the workflow.
- ♦ **Operation:** Displays the operation that was performed.
- ♦ **Process Name:** The name of the original workflow.

- ♦ **Parallel Workflow Thread Name:** Name of the workflow thread that is parallel to the workflow.
- ♦ **State Name:** State of the workflow process.

6.10 Notifying Others about a Folder Entry

When viewing a folder entry, you might think of a co-worker who might also need the information. Kablink Teaming provides various ways to inform your friends and co-workers about entries that you think they might be interested in.

- ♦ [Section 6.10.1, “Sharing an Entry,” on page 88](#)
- ♦ [Section 6.10.2, “Sending an E-Mail about an Entry,” on page 88](#)

6.10.1 Sharing an Entry

When you share a folder entry with someone, that person can view that entry in the *Micro-Blogs and Shared Items* tab in his or her personal workspace. For information on how to view shared entries, see [Section 2.11.3, “Viewing Shared Items,” on page 36](#).

- 1 In the entry that you want to share, click *Share This Entry* in the Entry toolbar.
- 2 In the provided page, select the users, groups, or teams with whom you want to share the entry.
- 3 In the *Comments* section, provide any comments that you want to include.
- 4 Click *OK*.

The entry is now shared with the users that you specified.

6.10.2 Sending an E-Mail about an Entry

You can send a notification e-mail about a folder entry when you are creating the entry, or after the entry has already been created.

- ♦ [“Sending an E-Mail When the Entry is Created” on page 88](#)
- ♦ [“Sending an E-Mail After the Entry is Created” on page 88](#)

Sending an E-Mail When the Entry is Created

- 1 In the entry creation form when you are creating an entry, click *Send E-Mail When Entry is Submitted*.
- 2 Fill in the appropriate fields.
For information on filling in the rest of the Send E-Mail form, see [Section 8.4, “Filling Out the Send E-Mail Page,” on page 109](#).
- 3 Click *OK* to create the entry and send the e-mail.

Sending an E-Mail After the Entry is Created

You do not need to be the author of the entry to send this type of e-mail.

- 1 Navigate to the entry that you want to inform others about via e-mail.
- 2 Select the entry, then click *Send E-Mail* in the entry’s Footer toolbar.

The Send E-Mail page is displayed.

A link to this entry is automatically created in the *Subject* field.

- 3 Fill in the appropriate fields.

For information on filling in the rest of the Send E-Mail form, see [Section 8.4, “Filling Out the Send E-Mail Page,” on page 109](#).

- 4 Click *OK* to send the notification.

For Blog entries, you can use the Blog Toolbar to send an e-mail about the entry. For information on using the Blog Toolbar, see [“Using the Blog Toolbar” on page 68](#).

6.11 Subscribing to a Folder Entry

If you are particularly interested in a specific folder entry, you can subscribe to that entry. When you subscribe to an entry, Kablink Teaming notifies you of any activity that takes place in the entry.

- 1 Navigate to and open the entry that you want to subscribe to.
- 2 In the Footer toolbar of the entry, click *Subscribe to This Entry*.
- 3 Select the type of e-mail notification that you want to receive, then click *OK*.

For more information on subscribing to entries, see [Section 2.12, “Subscribing to a Folder or Entry,” on page 36](#).

For Blog entries, you can use the Blog Toolbar to subscribe to the entry. For information on using the Blog Toolbar, see [“Using the Blog Toolbar” on page 68](#).

6.12 Tagging a Folder Entry

Tags are keywords that categorize a workspace, folder, or folder entry. Tagging functionality in Kablink Teaming enables you to create virtual containers for places and entries. Like folders in your e-mail, you can categorize information, and then come back to it at a later time.

- 1 In the entry that you want to tag, click *Tag this*.
- 2 Type the name of the tag into the field in either the *Personal Tags* or *Community Tags* section.

To decide whether you want to create a personal or community tag, see [Section 3.7.4, “Choosing Between Personal Tags and Community Tags,” on page 44](#).

This field uses Type-to-Find functionality, so if a tag already exists with the desired name, it appears in the drop-down list. If the name does not appear in the drop-down list, you are creating a new tag.

- 3 Finish typing the name of the tag, or select it from the drop-down list, then click *Add*.

The entry is now tagged with the tag that you specified.

For more information on tagging, see [Section 3.7, “Using Tags,” on page 43](#).

6.13 Attaching Files to a Folder Entry

In the *Attachments* section of an entry, Kablink Teaming provides various alternatives to add attachments to the entry.

- 1 Navigate to and select the entry where you want to attach the file, then continue with the appropriate action.
 - ♦ [Section 6.13.1, “Dragging and Dropping Files,” on page 90](#)
 - ♦ [Section 6.13.2, “Accessing Attachments Through WebDAV \(Supported Environments Only\),” on page 90](#)
 - ♦ [Section 6.13.3, “Uploading a Single File,” on page 90](#)

6.13.1 Dragging and Dropping Files

You can attach a file to an entry by dragging it from another location and dropping into the entry.

- 1 Click the *Drag and Drop Files* icon.

This launches a window with a folder icon.
- 2 Drag the file that you want to upload and drop it onto the folder icon.

Teaming displays an opening and closing folder to signify that your dropped files are being uploaded as attachments.

You can also copy and paste files into the folder icon.

6.13.2 Accessing Attachments Through WebDAV (Supported Environments Only)

Teaming enables you to use WebDAV to access files and attach them to entries. However, Teaming enables WebDAV tools only in specific environments. For a description of supported environments, see [“Prerequisites for Using WebDAV” on page 62](#).

- 1 Navigate to the entry where you want to attach a file using WebDAV.
- 2 Click *Access Attachments Using WebDAV*.
- 3 Navigate to and select the file that you want to attach.

For more information on WebDAV, see [Section 5.1.6, “Accessing WebDAV Files from within Teaming,” on page 62](#).

6.13.3 Uploading a Single File

- 1 In the entry where you want to upload the file, click the *Upload a Single File* icon in the *Attachments* section.
- 2 Click *Browse*, then browse to and select the file that you want to attach.
- 3 Click *OK*.

6.14 Rating a Folder Entry

Kablink Teaming enables you to rate folder entries by using a five-star rating system (one star indicating the least impressive, and five stars the most impressive), which gives you an additional tool for determining the quality of information.

- 1 Navigate to the entry that you want to rate.
- 2 Click the star that represents your evaluation.


For example, to give an entry a rating of three stars, click the third star from the left.

In the parentheses to the right of the stars, Teaming displays the average rating for the entry, and how many users have rated the entry.

You can rate an entry as many times as you want, but Teaming records only your most recent rating.

6.15 Printing a Folder Entry

Kablink Teaming enables you to print only the content of a folder entry.

- 1 Navigate to the entry that you want to print.
- 2 In the Entry toolbar, click the *Print* icon .
- 3 Configure your printer settings, then click *OK*.

6.16 Using Version Control With Files

When you modify a file in Kablink Teaming, Teaming saves the previous version of the file, and makes it available for easy reference. This includes files that are stored in Teaming File folders, or any files that are saved as attachments.

- ♦ [Section 6.16.1, “Creating a New Version of a File,” on page 91](#)
- ♦ [Section 6.16.2, “Accessing a Previously Saved Version of a File,” on page 92](#)

6.16.1 Creating a New Version of a File

Teaming enables you to create a new version of a file in the following ways:

- ♦ [“Editing the File to Create a New Version” on page 91](#)
- ♦ [“Dragging and Dropping an Updated File to Create a New Version” on page 92](#)

Editing the File to Create a New Version

You can simply edit the existing file to create a new version of a file.

- 1 Navigate to and select a saved file entry or attachment that you want to modify.
- 2 Click the *Edit* link, located to the right of the filename.

The file is launched in the file editor that you specified. For information on how to change the editor that Teaming uses to edit files, see [Section B.7, “Unable to Edit Files that Are Attached to Entries,” on page 123](#).

- 3 (Conditional) If Teaming prompts you to provide your Teaming credentials, specify the username and password that you use to log in to Teaming, then click *OK*.

You can now edit the file.

- 4 After you have edited the file, save your changes, then exit the editing application.

Teaming creates a version of the file as it was before you modified it. When you exit and reopen the entry, you can view the older version of the file, as described in [Section 6.16.2, “Accessing a Previously Saved Version of a File,”](#) on page 92.

Dragging and Dropping an Updated File to Create a New Version

You can simply drag and drop an updated version of a file into the drag-and-drop window to create a new version of a file.

- 1 Navigate to the folder where you want to import the new version of the file.
- 2 Click *Add Files to Folder* in the Folder Entry toolbar.

The drag-and-drop window opens.

- 3 Drag a file from one location, such as your desktop, and drop it onto the folder icon in the drag-and-drop window.

In order to create a new version of an existing file in the folder, the file that you upload must have the same name as the existing file for which you want to create a new version.

The document is added as a new version of the existing file entry. Older versions are displayed in the *Previous Versions* section of the entry.

6.16.2 Accessing a Previously Saved Version of a File

- 1 Navigate to and select a saved file for which you want to access a previous version.
- 2 In the *Attachments* section of the entry, click *Previous Versions*.

All of the previously saved versions of the file are listed in reverse-chronological order. Teaming displays the date, file size, and the person who modified the file.

- 3 Click the version of the file that you want to view.

6.17 Enabling Alternate Folder Entry Types

Kablink Teaming enables you to configure a folder to allow you to create folder entry types that you cannot create by default in a specific type of folder. For example, if you want your tasks to show up in your Calendar folder, you can configure your Calendar folder to allow you to create task entries.

- 1 Navigate to the folder where you want to enable the alternate entry type.
- 2 Click *Manage > Configure*.
The Configure Default Settings page is launched.
- 3 In the *Default Entry Types* section, select the entry types that you want to enable for the folder.
- 4 Click *Apply*, then click *Close*.

You can also create custom entry forms and enable them on any folder of your choice. For information on how to create custom entry forms, see “[Designing Custom Folder Entry Forms](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

6.18 Creating Custom Folder Entry Forms

Kablink Teaming enables you to create custom folder entry forms, so you can display fields that are specific to your organization and business requirements.

For instructions on how to create custom entry forms, see “[Designing Custom Folder Entry Forms](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

6.19 Displaying Folder Entries on a Landing Page

When you configure a workspace to have a landing page, you populate that landing page with entries that exist within that workspace.

For information on how to display entries on a landing page, see “[Adding Content to Your Landing Page](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

Managing Accessories

7

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

This section includes the following subsections:

- ♦ [Section 7.1, “Types of Accessories,” on page 95](#)
- ♦ [Section 7.2, “Creating an Accessory,” on page 97](#)
- ♦ [Section 7.3, “Modifying an Accessory,” on page 102](#)
- ♦ [Section 7.4, “Deleting an Accessory,” on page 103](#)
- ♦ [Section 7.5, “Minimizing an Accessory,” on page 103](#)
- ♦ [Section 7.6, “Minimizing the Accessory Panel,” on page 103](#)
- ♦ [Section 7.7, “Repositioning Accessories,” on page 104](#)
- ♦ [Section 7.8, “Establishing a Default Layout,” on page 104](#)
- ♦ [Section 7.9, “Providing a Title for the Accessory Panel,” on page 104](#)

7.1 Types of Accessories

Kablink Teaming accessories make your work easier by making the most useful information more accessible and easy to consume.

Depending on your goals, you might decide to use any of the following Teaming accessories:

- ♦ [Section 7.1.1, “Search Results,” on page 96](#)
- ♦ [Section 7.1.2, “Workspace Tree,” on page 96](#)
- ♦ [Section 7.1.3, “Formatted Text \(HTML Editor\),” on page 96](#)
- ♦ [Section 7.1.4, “Embedded Web Page \(iframe\),” on page 96](#)
- ♦ [Section 7.1.5, “Buddy List,” on page 96](#)
- ♦ [Section 7.1.6, “Team Members,” on page 96](#)
- ♦ [Section 7.1.7, “Photo Gallery,” on page 96](#)
- ♦ [Section 7.1.8, “Blog Summary,” on page 96](#)
- ♦ [Section 7.1.9, “Guestbook,” on page 96](#)
- ♦ [Section 7.1.10, “Task Summary,” on page 97](#)
- ♦ [Section 7.1.11, “Wiki Home Page,” on page 97](#)
- ♦ [Section 7.1.12, “Calendar Summary,” on page 97](#)
- ♦ [Section 7.1.13, “Remote Application,” on page 97](#)

7.1.1 Search Results

The Search Results accessory enables you to configure a search, then apply that search to any Teaming page that you desire, across the entire site or only on the page where the accessory is displayed.

7.1.2 Workspace Tree

The Workspace Tree accessory enables you to display a customized Workspace tree. Unlike the main Workspace tree, you can configure the Workspace Tree accessory to start on any workspace that you desire.

7.1.3 Formatted Text (HTML Editor)

The Formatted Text accessory enables you to use the HTML editor to compose a message and display it in the Accessory Panel.

7.1.4 Embedded Web Page (iframe)

The Embedded Web Page accessory enables you to display any Web page as an accessory in a workspace or folder. For example, if a team you are working on often refers to a specific Web site, you could create an Embedded Web Page accessory in the team workspace, so team members don't need to navigate separately to the Web site.

7.1.5 Buddy List

The Buddy List accessory enables you to specify certain Teaming users with whom you communicate often, so you can quickly contact them by using their *Presence* icon, or access their workspaces by clicking a linked name.

7.1.6 Team Members

The Team Members accessory enables you to display all members of the team in the folder or workspace where you currently are.

7.1.7 Photo Gallery

The Photo Gallery accessory enables you to display photos from any Photo Album that you desire.

7.1.8 Blog Summary

The Blog Summary accessory enables you to synchronize the Teaming Blog folders of your choice, and display them in a single, summarized Blog folder in the Accessory Panel.

7.1.9 Guestbook

The Guestbook accessory enables you to use the Accessory Panel to display the contents of a Guestbook folder. Unlike other accessories, such as the Calendar Summary and Task Summary, you can display the contents of only one Guestbook folder in each Guestbook accessory.

7.1.10 Task Summary

The Task Summary accessory enables you to synchronize the Teaming Task folders of your choice, and display them in a single, summarized task list in the Accessory Panel. This eliminates the need to check multiple Task folders. You can display tasks that are assigned to specific users, groups, or teams.

For more information, see [“Synchronizing the Teaming Task Folders of Your Choice” on page 77](#).

7.1.11 Wiki Home Page

The Wiki Home Page accessory enables you to display the wiki home page of any Wiki folder (Wiki Topic) as an accessory.

For information on how to set a wiki home page for a wiki topic, see [“Setting a Wiki Home Page” on page 78](#).

7.1.12 Calendar Summary

The Calendar Summary accessory enables you to synchronize the Teaming calendars of your choice, and display them in a single, summarized calendar in the Accessory Panel. This eliminates the need to check multiple calendars.

7.1.13 Remote Application

The Remote Application accessory enables you to add a remote application as an accessory, if the application has been enabled by your administrator.

For more information on remote applications, see [Section 2.13, “Using Remote Applications,” on page 39](#).

7.2 Creating an Accessory

- ♦ [Section 7.2.1, “Locating The Accessory Panel,” on page 97](#)
- ♦ [Section 7.2.2, “Creating the Accessory,” on page 98](#)
- ♦ [Section 7.2.3, “Setting Up the Accessory,” on page 98](#)

7.2.1 Locating The Accessory Panel

The Accessory Panel is located in different sections of the page, depending on whether you are in a workspace or a folder.

- ♦ [“Locating the Accessory Panel in Workspaces” on page 97](#)
- ♦ [“Locating the Accessory Panel in Folders” on page 98](#)

Locating the Accessory Panel in Workspaces

The location of the accessory panel differs, depending on the type of workspace that you are viewing.

Project Management Workspace: Upper right corner of the workspace.

Personal Workspace: In the *Overview* tab.

Team Workspace: Upper right corner of the workspace.

Discussions Workspace: Upper right corner of the workspace.

Basic Workspace: Upper right corner of the workspace.

Landing Page: You can add an Accessory Panel element to any location in your landing page.

For more information on how to add an Accessory Panel to a landing page, see “[Adding Accessories to Your Landing Page](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

Locating the Accessory Panel in Folders

For folders, The Accessory Panel is located in the upper right corner of the folder page, above the content of the folder.

By default, accessory panels are not displayed in Blog folders and Micro-Blog folders.

7.2.2 Creating the Accessory

1 Navigate to the workspace or folder where you want to create the accessory.

2 Click the *Accessory Panel* drop-down list.

If you are unable to find the Accessory Panel, see [Section 7.2.1, “Locating The Accessory Panel,” on page 97](#).

If you currently have no accessories, only the *Add an accessory* item appears in the list.

3 Click *Add an Accessory*.

4 In the *Accessory Scope* section, select where you want the accessory to be displayed.

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.

5 In the *Accessory Type* section, select the type of accessory that you want to display, then click *OK*.

For more information on the various types of accessories, see [Section 7.1, “Types of Accessories,” on page 95](#).

The Accessory Setup page is displayed.

6 To finish creating the accessory, continue with [Section 7.2.3, “Setting Up the Accessory,” on page 98](#) for specific information on filling in the Accessory Setup page for each type of accessory.

7.2.3 Setting Up the Accessory

Use the steps in this section to set up an accessory after you have completed the steps in [Section 7.2.2, “Creating the Accessory,” on page 98](#).

This section contains specific information on filling in the Accessory Setup page for each type of accessory.

- ♦ “Search Results” on page 99
- ♦ “Workspace Tree” on page 99
- ♦ “Formatted Text (HTML Editor)” on page 99
- ♦ “Embedded Web Page (iframe)” on page 100
- ♦ “Buddy List” on page 100
- ♦ “Team Members” on page 100
- ♦ “Photo Gallery” on page 100
- ♦ “Blog Summary” on page 101
- ♦ “Guestbook” on page 101
- ♦ “Task Summary” on page 101
- ♦ “Wiki Home Page” on page 101
- ♦ “Calendar Summary” on page 102
- ♦ “Remote Application” on page 102

Search Results

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Search Results accessory.

Display Style: Specify whether you want a border around the accessory.

Advanced Search: For information on all of the Advanced Search options, see [Section 2.5.2, “Using Advanced Search,”](#) on page 30.

- 2 Click *Apply* > *Close*.

Workspace Tree

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Workspace Tree accessory.

Display Style: Specify whether you want a border around the accessory.

Starting Point for the Tree: Select whether you want to start at the current workspace, or select a starting workspace in the workspace tree. If you want to select a starting workspace, select *Select a Starting Workspace* and then navigate to and select the workspace in the workspace tree.

Expand the First Level of the Tree: Select *Yes* if you want the first level of the tree to always be expanded. Select *No* if you want to manually expand the tree.

- 2 Click *Apply* > *Close*.

Formatted Text (HTML Editor)

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Formatted Text (HTML Editor) accessory.

Enter the HTML to be Shown: Create your HTML message in the HTML editor provided.

This message is displayed in your Formatted Text accessory.

Display Style: Specify whether you want a border around the accessory.

- 2 Click *Apply* > *Close*.

Embedded Web Page (iframe)

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Embedded Web Page (iframe) accessory.

Display Style: Specify whether you want a border around the accessory.

Iframe URL: Specify the URL of the Web page that you want to display in this accessory.

Iframe height in pixels: Specify the height for your embedded Web page.

If you don't specify anything in this field, Teaming uses the default height (about 200 pixels).

- 2 Click *Apply* > *Close*.

Buddy List

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Buddy List accessory.

Display Style: Specify whether you want a border around the accessory.

Configure Buddy List: Specify the users, groups, and team members that you want to add to your buddy list.

- 2 Click *Apply* > *Close*.

Team Members

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Team Members accessory.

Display Style: Specify whether you want a border around the accessory.

Number of Results to be Shown: Specify the number of team members that you want to be shown at one time.

- 2 Click *Apply* > *Close*.

Photo Gallery

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Photo Gallery accessory.

Display Style: Specify whether you want a border around the accessory.

Number of Photos to be Shown: Specify the number of photos that you want to display at any one time in your photo gallery.

Image Size: Select whether you want to display big images or small images.

Select the Photo Album(s) to be Shown: Use the workspace tree to browse to and select the photo albums that you want to be displayed in the accessory.

- 2 Click *Apply* > *Close*.

Blog Summary

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Blog Summary accessory.

Display Style: Specify whether you want a border around the accessory.

Number of Results to be Shown: Specify the number of Blog results that you want to show in the Blog Summary.

Number of Words of Summary to be Shown: Specify the number of words that you want to display for each blog summary.

Select the blog(s) to be shown: Use the Workspace tree to navigate to and select the Blog folders that you want to display in the Blog Summary.

- 2 Click *Apply* > *Close*.

Guestbook

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Guestbook accessory.

Display Style: Specify whether you want a border around the accessory.

Number of Results to be Shown: Specify the number of Guestbook results that you want to show in the Guestbook accessory.

Number of Words of Summary to be Shown: Specify the number of words that you want to display for each guestbook entry.

Select the guestbook to be shown: Use the Workspace tree to navigate to and select the Guestbook folder that you want to display in the Guestbook accessory.

- 2 Click *Apply* > *Close*.

Task Summary

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Task Summary accessory.

Display Style: Specify whether you want a border around the accessory.

Number of Results to be Shown: Specify the number of Task results that you want to show in the Task Summary accessory.

Show Only the Tasks Assigned To: Specify the users, groups, or teams who are the assignees of the tasks that you want to display.

Select the Task Folder(s) to be Shown: Use the Workspace tree to navigate to and select the Task Summary folder that you want to display in the Task Summary accessory.

- 2 Click *Apply* > *Close*.

Wiki Home Page

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Wiki Home Page accessory.

Display Style: Specify whether you want a border around the accessory.

Select the Wiki to be Shown: Use the Workspace tree to navigate to and select the Wiki folder that you want to display in the Wiki Home Page accessory.

In the Wiki Home Page accessory, Teaming displays the wiki entry that you have configured to be the wiki home page for the Wiki folder (Wiki Topic) that you select here.

- 2 Click *Apply* > *Close*.

Calendar Summary

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Calendar Summary accessory.

Display Style: Specify whether you want a border around the accessory.

Select the Calendar Folder(s) to be Shown: Use the Workspace tree to navigate to and select the Calendar folders that you want to display in the Calendar Summary accessory.

- 2 Click *Apply* > *Close*.

Remote Application

You can set up a remote application as an accessory if your administrator has enabled the application.

- 1 In the Accessory Setup page, specify the following information:

Title: Specify a title for the Remote Application accessory.

Display Style: Specify whether you want a border around the accessory.

Remote Application: From the provided drop-down list, select the remote application that you want to display in the accessory.


- 2 Click *Apply* > *Close*.

7.3 Modifying an Accessory


You can modify an accessory after you have created it.

- ♦ [Section 7.3.1, “Modifying an Accessory That Has a Border,” on page 102](#)
- ♦ [Section 7.3.2, “Modifying an Accessory That Doesn’t Have a Border,” on page 102](#)

7.3.1 Modifying an Accessory That Has a Border

- 1 Click the *Modify* icon  in the accessory’s title bar.
- 2 Make the modifications that you desire, then click *Apply* > *Close*.

7.3.2 Modifying an Accessory That Doesn’t Have a Border

- 1 Click the *Accessory Panel* drop-down list > *Show Hidden Borders and Controls*.
The accessory’s title bar is displayed.
- 2 Click the *Modify* icon  in the accessory’s title bar.
- 3 Make the modifications that you desire, then click *Apply* > *Close*.

7.4 Deleting an Accessory

When you delete an accessory, 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.

- [Section 7.4.1, “Deleting an Accessory That Has a Border,” on page 103](#)
- [Section 7.4.2, “Deleting an Accessory That Doesn’t Have a Border,” on page 103](#)

7.4.1 Deleting an Accessory That Has a Border

- 1 Click the *Delete* icon (X) in the accessory’s title bar.
- 2 Click *OK*.

7.4.2 Deleting an Accessory That Doesn’t Have a Border

- 1 Click the *Accessory Panel* drop-down list > *Show Hidden Borders and Controls*.
The accessory’s title bar is displayed.
- 2 Click the *Delete* icon (X) in the accessory’s title bar.
- 3 Click *OK*.

7.5 Minimizing an Accessory


After you minimize an accessory, only the accessory’s title bar is displayed.

- [Section 7.5.1, “Minimizing an Accessory That Has a Border,” on page 103](#)
- [Section 7.5.2, “Minimizing an Accessory That Doesn’t Have a Border,” on page 103](#)

7.5.1 Minimizing an Accessory That Has a Border


- 1 Click the *Minimize* icon  in the accessory’s title bar.

7.5.2 Minimizing an Accessory That Doesn’t Have a Border

- 1 Click the *Accessory Panel* drop-down list > *Show Hidden Borders and Controls*.
The accessory’s title bar is displayed.
- 2 Click the *Minimize* icon  in the accessory’s title bar.


7.6 Minimizing the Accessory Panel

You can minimize the entire Accessory Panel. This hides all of the accessories that are in the Accessory Panel on the current page.

- 1 Click the *Minimize* icon , located to the right of the *Accessory Panel* drop-down list.

7.7 Repositioning Accessories


On pages where you have more than one accessory, you can reposition accessories within the Accessory Panel.

- 1 In the title bar of the accessory that you want to move, click the arrow icons , depending on whether you want to move the accessory up or down in the Accessory Panel.

7.8 Establishing a Default Layout

When you create accessories for every page that you view or for a community accessories panel, the accessories are displayed in the reverse order in which they were created. Kablink Teaming enables you to rearrange the order of the accessories within the panel, allowing you to determine an optimal default order in which the defined accessories appear. (If you are not the owner of the community accessory, you can override higher-level settings by personalizing the order of the accessories within the community panel, as described in [Section 7.7, “Repositioning Accessories,” on page 104.](#))

To change the layout of a global, personal accessory panel or a community accessory panel:

- 1 Click the Accessory Panel drop-down list.
- 2 Click *Set Default Layout for Community Accessories*, or *Set Default Layout for Personal Global Accessories*, depending on which type of layout that you want to set.
The Configure the Accessory Panel page is displayed.
- 3 In the title bar of the accessory that you want to move, click the arrow icons , depending on whether you want to move the accessory up or down in the Accessory Panel.
- 4 Click *Close*.

7.9 Providing a Title for the Accessory Panel

To name your Accessory Panel:

- 1 Click the *Accessory Panel* drop-down list.
- 2 Click *Set the accessory panel's title*.
- 3 Specify the following information:
New Title: Provide a title for your Accessory Panel.
Accessory Panel Title Scope: Select whether you want the new name to apply to your personal Accessory Panel for this page only, your personal Accessory Panel for all pages, or the community Accessory Panel for this place only.
- 4 Click *OK*.

Kablink® Teaming enables you to directly connect with your co-workers.

- ♦ [Section 8.1, “Using Kablink Conferencing with Kablink Teaming,” on page 105](#)
- ♦ [Section 8.2, “Using Skype From within Teaming,” on page 107](#)
- ♦ [Section 8.3, “Sending E-Mail From within Teaming,” on page 107](#)
- ♦ [Section 8.4, “Filling Out the Send E-Mail Page,” on page 109](#)
- ♦ [Section 8.5, “Using the Teaming Clipboard,” on page 109](#)

8.1 Using Kablink Conferencing with Kablink Teaming

Teaming 2.0 supports the use of Conferencing 1.0, which enables you to collaborate with other Teaming users in the following ways:

- ♦ [Section 8.1.1, “Starting an Instant Conferencing Meeting,” on page 105](#)
- ♦ [Section 8.1.2, “Scheduling a Conferencing Meeting,” on page 106](#)
- ♦ [Section 8.1.3, “Instant Messaging,” on page 106](#)
- ♦ [Section 8.1.4, “Making a Conferencing Voice Call,” on page 106](#)

8.1.1 Starting an Instant Conferencing Meeting

You can start an instant Conferencing meeting from within Teaming by using the *Presence* icon of a Teaming user, or by clicking *Meet* in the main sidebar.

- ♦ [“Using the Presence Icon to Start an Instant Meeting” on page 105](#)
- ♦ [“Starting an Instant Meeting from the Main Sidebar” on page 105](#)

Using the Presence Icon to Start an Instant Meeting

- 1 Click the *Presence* icon of a Teaming user with whom you want to schedule a meeting.
- 2 Click *Start Instant Meeting*.
The Conferencing client is launched.

Starting an Instant Meeting from the Main Sidebar

- 1 In the main sidebar, click *Meet*.
The Add meeting page is displayed.
- 2 In the *Invitees* section, specify the users who you want to invite to the meeting.
- 3 Click *Start Meeting Now*.
The Conferencing client is launched.

For more information about how to use Kablink Conferencing, see the [Kablink Conferencing User Guide](http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf) (<http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf>).

8.1.2 Scheduling a Conferencing Meeting

You can schedule a Conferencing meeting from within Teaming by using the *Presence* icon of a Teaming user, or by clicking *Meet* in the main sidebar.

- ♦ “Using the Presence Icon to Schedule a Meeting” on page 106
- ♦ “Scheduling a Meeting from the Main Sidebar” on page 106

Using the Presence Icon to Schedule a Meeting

- 1 Click the *Presence* icon of a Teaming user with whom you want to schedule a meeting.
- 2 Click *Schedule a Meeting*.
The Conferencing client is launched.

Scheduling a Meeting from the Main Sidebar

- 1 In the main sidebar, click *Meet*.
The Add meeting page is displayed.
- 2 In the *Invitees* section, specify the users who you want to invite to the meeting.
- 3 Click *Schedule for Later*.
The Conferencing client is launched.

For more information about how to use Kablink Conferencing, see the [Kablink Conferencing User Guide](http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf) (<http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf>).

8.1.3 Instant Messaging

You can use Conferencing to start a chat session with other Teaming users.

- 1 Click the *Presence* icon of a Teaming user whom you want to instant message.
- 2 Click *Send Instant Message*.
The Conferencing client is launched.

For more information about how to use Kablink Conferencing, see the [Kablink Conferencing User Guide](http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf) (<http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf>).

8.1.4 Making a Conferencing Voice Call

You can make a Conferencing voice call from within Teaming.

- 1 Click the *Presence* icon of a Teaming user whom you want to call.
- 2 Click *Call*.
The Conferencing client is launched.

For more information about how to use Kablink Conferencing, see the [Kablink Conferencing User Guide](http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf) (<http://kablink.org/docs/ICEcore%20Conference%20User%20Guide.pdf>).

8.2 Using Skype From within Teaming

Kablink Teaming enables you to communicate with other Teaming users through Skype, without needing to leave the Teaming interface.

This feature must first be configured by your Teaming administrator before you can use Skype from within Teaming. If you cannot perform the tasks in this section as described, consult your Teaming administrator. For information on how to enable Skype in your Teaming environment, see “[Integrating Skype with Teaming](#)” in the *Kablink Teaming 2.0 Administration Guide*.

- [Section 8.2.1, “Setting Up Your Skype Address in Teaming,” on page 107](#)
- [Section 8.2.2, “Contacting Other Teaming Users with Skype,” on page 107](#)

8.2.1 Setting Up Your Skype Address in Teaming


After Skype has been configured by your Teaming administrator, you must specify your Skype name in your personal profile.

- 1 In the home page of your personal workspace, click the *Profile* tab.
- 2 Click *Modify Profile* in the Workspace toolbar.
The User page is launched.
- 3 In the *Skype Name* field, specify your Skype username.
- 4 Click *OK*.

8.2.2 Contacting Other Teaming Users with Skype

You can use Skype to contact only those users who have specified their Skype name in their personal profile. For information on how to modify your personal profile, see [Section 8.2.1, “Setting Up Your Skype Address in Teaming,” on page 107](#).

To contact a Teaming user by using Skype:

- 1 Click the *Presence* icon  of the user whom you want to call using Skype.
- 2 Click *Call Using Skype*.
The Skype application is launched.
For information on how to use Skype, see the Skype documentation.

8.3 Sending E-Mail From within Teaming

Kablink Teaming enables you to send e-mail messages to your co-workers from a variety of different places within Teaming, and for a variety of reasons.

- [Section 8.3.1, “Informing Others about a Folder or Workspace,” on page 108](#)
- [Section 8.3.2, “Informing Others about a New Entry,” on page 108](#)
- [Section 8.3.3, “Informing Others about an Existing Entry,” on page 108](#)
- [Section 8.3.4, “Sending E-Mail Notifications to Other Users,” on page 108](#)

The following options are functional only if you have an e-mail account assigned to you in Teaming. To assign an e-mail account to your Teaming profile, see [Section 1.5.1, “Modifying Your Profile,” on page 19](#).

8.3.1 Informing Others about a Folder or Workspace

Teaming enables you to send an e-mail message to inform them about a specific folder or workspace.

- 1 Navigate to the folder or workspace that you want to inform others about via e-mail.
- 2 In the main sidebar, click *Send E-Mail*.
The Send E-Mail page is displayed.
A link to this folder or workspace is automatically created in the *Message* field.
- 3 Fill in the appropriate fields.
For information on filling in the rest of the Send E-Mail form, see [Section 8.4, “Filling Out the Send E-Mail Page,” on page 109](#).

8.3.2 Informing Others about a New Entry

- 1 When you are creating an entry, click *Send E-Mail When Entry is Submitted*.
Options are displayed that enable you to specify the users that you want to send the e-mail to.
A link to this entry is automatically created in the *Subject* field.
- 2 Fill in the appropriate fields.
For information on filling in the rest of the Send E-Mail form, see [Section 8.4, “Filling Out the Send E-Mail Page,” on page 109](#).

8.3.3 Informing Others about an Existing Entry

- 1 Navigate to the entry that you want to inform others about via e-mail.
- 2 In the Footer toolbar for the entry, click *Send E-Mail*.
The Send E-Mail page is displayed.
A link to this entry is automatically created in the *Subject* field.
- 3 Fill in the appropriate fields.
For information on filling in the rest of the Send E-Mail form, see [Section 8.4, “Filling Out the Send E-Mail Page,” on page 109](#).

8.3.4 Sending E-Mail Notifications to Other Users

If you are the owner of a folder, you can configure that folder to send e-mail notifications to specific Teaming users.

For information on how to do this, see “[Configuring Folders to Send E-Mail Notifications to Other Users](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

8.4 Filling Out the Send E-Mail Page

When you send e-mail from within Teaming, Teaming displays the Send E-Mail page. This page contains the following fields and options:

Add E-Mail Addresses: Specify users individual e-mail addresses. You must separate multiple e-mail addresses with commas; do not include spaces between addresses.

Your e-mail address: Select your name if you want to include yourself on the e-mail.

Users: Use Type-to-Find functionality to specify individual users to whom you want to send the e-mail.

Groups: Use Type-to-Find functionality to specify individual groups to whom you want to send the e-mail.

Clipboard User Names: Click this option to include all users whose names are currently on your clipboard.

For more information on using the Teaming clipboard, see [Section 8.5, “Using the Teaming Clipboard,” on page 109](#).

Team Members: Click this option to include all team members.

CC: Click this option to specify users to whom you want to send a carbon copy of the message.

BCC: Click this option to specify users to whom you want to send a blind copy of the message.

Subject: Specify the subject of your e-mail message.

Message/Additional Text Sent with the Entry: Specify the main content of your e-mail message.

Include Attachments: (This option is not available when you send an e-mail from a folder or workspace.) Select this option if you want to include any attachments that are attached to the entry from where you are sending the e-mail.

8.5 Using the Teaming Clipboard

The clipboard in Kablink Teaming is a tool that you can use to gather people’s names as you visit places within Teaming. Later, when using a tool that requires you to specify usernames, you can easily reference the names on your clipboard. For example, you can put a name on the clipboard, then when you want to send an e-mail message from Teaming, you refer to the clipboard to specify the name of the user to whom you want to send the e-mail.

Names remain on the clipboard until you remove them or until you sign out.

- ♦ [Section 8.5.1, “Adding Names to the Clipboard,” on page 109](#)
- ♦ [Section 8.5.2, “Removing Names from the Clipboard,” on page 110](#)
- ♦ [Section 8.5.3, “Using the Names on Your Clipboard,” on page 111](#)

8.5.1 Adding Names to the Clipboard

- ♦ [“Adding Users from the Current Page” on page 110](#)

- ♦ “Adding Team Members” on page 110
- ♦ “Adding Individual Users” on page 110

Adding Users from the Current Page

Teaming enables you to add all users to the clipboard who have added or modified an entry on the current page.

- 1 Navigate to the page where you want to add users to the clipboard.
- 2 In the main sidebar, click *Clipboard*.
The Clipboard dialog box is displayed.
- 3 Click *Add people from this page*.
Those users who have added or modified entries on this page are added to the clipboard.
If you are in the home page of a user’s personal workspace, clicking this option adds the owner of the personal workspace.
- 4 Click *Close*.


Adding Team Members

Teaming enables you to add all team members to the clipboard from the team workspace where you currently are.

You must be in a team workspace to add team members to the clipboard

- 1 Navigate to the team workspace where you want to add team members to the clipboard.
- 2 In the main sidebar, click *Clipboard*.
The Clipboard dialog box is displayed.
- 3 Click *Add team members*.
All members of the team are added to the clipboard.
- 4 Click *Close*.

Adding Individual Users

Teaming enables you to add individual users to the clipboard by clicking the user’s *Presence* icon , located next to his or her name in an entry.

- 1 Click the *Presence* icon of the user whom you want to add to the clipboard.
- 2 Click *Add to Clipboard*.

8.5.2 Removing Names from the Clipboard

You can easily remove names from the Teaming clipboard after you have added them.

- 1 In the *Clipboard* dialog box, select the names that you want to delete.
You can simultaneously select all names by clicking *Select All*. Click *Clear All* to deselect all names.
- 2 Click *Remove Selected Names*.
- 3 Click *Close*.

8.5.3 Using the Names on Your Clipboard

There are various places in Teaming where you can use the names that are stored on your clipboard:

- ♦ When sending e-mail
- ♦ When creating a new team workspace
- ♦ When adding additional team members to a workspace

Before you can use a workflow in Kablink® Teaming, it must first be created and enabled. Workflows can be created and enabled for use in a folder by folder owners, or they can be created and enabled for use across the entire Teaming site by Teaming administrators. For information on how to enable a workflow, see “[Creating and Managing Workflows](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

Because workflow creators can control who has rights to perform certain functions concerning the workflow, you might not have appropriate rights to work with workflows as described in this section. For more information on setting access controls on workflows, see “[Adding Access Controls](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

- ♦ [Section 9.1, “Manually Starting and Stopping a Workflow,” on page 113](#)
- ♦ [Section 9.2, “Manually Transitioning a Workflow After It Starts,” on page 114](#)

9.1 Manually Starting and Stopping a Workflow

If a workflow has been enabled for use in a folder where you are creating an entry, then depending on how the folder owner or site administrator enabled the workflow, the workflow either automatically starts when you create the entry, or you can manually start it after the entry is created.

- ♦ [Section 9.1.1, “Manually Starting a Workflow,” on page 113](#)
- ♦ [Section 9.1.2, “Manually Stopping a Workflow,” on page 113](#)

9.1.1 Manually Starting a Workflow

- 1 Navigate to and select the entry where you want to start the workflow.
- 2 In the Entry toolbar, click *Workflow*, then select the workflow that you want to start on the entry.

Multiple workflows can be enabled in the same folder, so multiple workflows might appear in the drop-down list.

- 3 Click *OK* when you are prompted about whether you really want to start the workflow.

9.1.2 Manually Stopping a Workflow

- 1 Navigate to and select the entry where you want to stop the workflow.
- 2 In the Entry toolbar, click *Workflow*, then select the workflow that you want to stop.

Multiple workflows can be active on the same entry, so multiple workflows might appear in the drop-down list.

- 3 Click *OK* when you are prompted about whether you really want to stop the workflow.

9.2 Manually Transitioning a Workflow After It Starts

Workflows can be configured to automatically transition after the entry is modified, after someone has commented or replied to the entry, after a specified amount of time, or various other options.

Workflows can also be configured to be manually transitioned. If a workflow has been configured to be manually transitioned, and if you have appropriate rights, then you can manually transition the workflow from one workflow state to another.

- 1** Navigate to the entry that you want to transition to another workflow state.
The workflow must already be started on the entry.
- 2** In the *Workflow* section, in the *Transition to* field, click the drop-down arrow and select the workflow state that you want to transition the entry to.

What's New in Teaming 2.0



Welcome to Kablink® Teaming 2.0. You'll find new features, a fresh user interface, and significant updates. The following list is an overview of the new features in Teaming 2.0:

- ♦ [Section A.1, “New User Interface,” on page 115](#)
- ♦ [Section A.2, “Get Informed,” on page 116](#)
- ♦ [Section A.3, “Flexible Navigation,” on page 117](#)
- ♦ [Section A.4, “Easy Folder and Workspace Management,” on page 118](#)
- ♦ [Section A.5, “Skype Integration,” on page 120](#)
- ♦ [Section A.6, “Advanced User Enhancements,” on page 120](#)

A.1 New User Interface

The user interface for Teaming 2.0 has been significantly redesigned.

- ♦ [Section A.1.1, “Navigation Toolbar,” on page 115](#)
- ♦ [Section A.1.2, “Sidebar,” on page 115](#)
- ♦ [Section A.1.3, “Main Content Area,” on page 116](#)
- ♦ [Section A.1.4, “Video Tutorials,” on page 116](#)

A.1.1 Navigation Toolbar

Teaming 2.0 contains a Navigation toolbar that includes location identifiers, search tools, quick access lists, and tree navigation.

For more information, see [Chapter 3, “Navigating the Teaming Interface,” on page 41](#).

A.1.2 Sidebar

You can accomplish the following tasks by using the Teaming sidebar:

- ♦ Track workspaces, folders, and people
- ♦ Share a workspace or folder
- ♦ View recent places
- ♦ View the workspace or folder where you currently are, and any sub-workspaces or sub-folders, in the workspace tree
- ♦ View, manage, and send e-mail to your teams
- ♦ Tag a workspace or folder
- ♦ Change your personal preferences, such as the way entries are displayed, the default folder editor, and more
- ♦ Send an e-mail
- ♦ Access the Teaming clipboard

A.1.3 Main Content Area

The main content area of the Teaming interface displays the contents of folders, entries, and comments. It also displays workspace landing pages, search results, the home page of your personal workspace, and other content.

A.1.4 Video Tutorials

The Teaming video tutorials explain how to use important features in the new Teaming interface. You can access them from the *Video Tutorials* section on the home page of your personal workspace.

For more information on the Teaming video tutorials, see [Section 1.2, “Watching the Teaming Video Tutorials,” on page 14.](#)

A.2 Get Informed

Now Teaming 2.0 enables you to find out what colleagues are saying more easily than ever.

- ♦ [Section A.2.1, “What’s New Quick Access Tab,” on page 116](#)
- ♦ [Section A.2.2, “Tasks and Calendars Quick Access Tab,” on page 116](#)
- ♦ [Section A.2.3, “Recent Entries Quick Access Tab,” on page 116](#)
- ♦ [Section A.2.4, “Micro-Blogs and Shared Items Quick Access Tab,” on page 117](#)
- ♦ [Section A.2.5, “Track Workspaces, Folders, and People,” on page 117](#)
- ♦ [Section A.2.6, “Find What’s New in Specific Workspaces or Folders,” on page 117](#)
- ♦ [Section A.2.7, “Synchronizing Tasks and Calendars With iCal,” on page 117](#)

A.2.1 What’s New Quick Access Tab

Teaming 2.0 enables you to view what’s new and what’s most popular in your teams, your tracked places, or across the site.

For more information, see [Section 2.2.2, “Finding What’s New in Your Teams, Tracked Places, or Across the Entire Site,” on page 28](#) and [Section 2.3, “Finding What’s Most Popular In Your Teaming Site,” on page 28.](#)

A.2.2 Tasks and Calendars Quick Access Tab

Teaming 2.0 enables you to view the tasks that are assigned to you, and the calendar events for which you are scheduled on the current day.

For more information, see [Section 2.8, “Viewing Tasks,” on page 34](#) and [Section 2.9, “Viewing Calendar Events,” on page 34.](#)

A.2.3 Recent Entries Quick Access Tab

Teaming 2.0 enables you to view entries that you recently posted, as well as entries that you recently visited.

For more information, see [Section 2.7, “Viewing Recent Contributions,” on page 34](#).

A.2.4 Micro-Blogs and Shared Items Quick Access Tab

Teaming 2.0 enables you to view the micro-blog entries of the people you are tracking, as well as see any items that people have shared with you.

For more information, see [“Viewing the Micro-Blog Entries of People You Are Tracking” on page 35](#) and [Section 2.11.3, “Viewing Shared Items,” on page 36](#).

A.2.5 Track Workspaces, Folders, and People

Teaming 2.0 enables you to track workspaces, folders, and people. When you track something or someone in Teaming, you can easily see activity generated in the specific place that you are tracking, or for the specific person that you are tracking.

For more information, see [Section 2.6, “Tracking and Untracking Places and People of Interest,” on page 33](#).

A.2.6 Find What’s New in Specific Workspaces or Folders

Teaming 2.0 enables you to navigate to a specific workspace or folder, and immediately find the latest entries and additions.

For more information, see [Section 2.2.1, “Finding What’s New in a Workspace or Folder,” on page 28](#).

A.2.7 Synchronizing Tasks and Calendars With iCal

Teaming 2.0 enables you to synchronize your tasks and calendars with your desktop application by using iCal.

For more information, see [Section 2.15, “Synchronizing Teaming Task and Calendar Folders to a Desktop Calendar Application,” on page 39](#).

A.3 Flexible Navigation

Kablink Teaming 2.0 provides easier navigation than in previous releases.

- ♦ [Section A.3.1, “Tree Navigation,” on page 117](#)
- ♦ [Section A.3.2, “Recent Places,” on page 118](#)
- ♦ [Section A.3.3, “Configuring a Folder and Workspace with a Simple URL,” on page 118](#)
- ♦ [Section A.3.4, “Entry Listing Toolbar,” on page 118](#)

A.3.1 Tree Navigation

The Workspace tree enables you to navigate to any page in the Teaming site, without leaving the current page.

For more information, see [Section 3.1, “Navigating the Workspace Tree,” on page 41](#).

A.3.2 Recent Places

Teaming 2.0 enables you to see and quickly revisit the folders and workspaces that you most recently accessed.

For more information, see [Section 3.3, “Viewing and Revisiting Recent Places,”](#) on page 42.

A.3.3 Configuring a Folder and Workspace with a Simple URL

You can quickly navigate to folders and workspaces by defining a simple URLs with which to reference the folder or workspace.

For more information on defining a simple URL for a folder, see [Section 5.1.9, “Setting Up a Folder to Receive Entries Via E-Mail,”](#) on page 63.

For more information on defining a simple URL for a workspace, see [Section 4.1.8, “Defining a User-Friendly URL for a Workspace,”](#) on page 50.

A.3.4 Entry Listing Toolbar

The Entry Listing toolbar provides features that enable you to quickly locate entries within a folder.

For more information, see [Section 5.2.2, “Listing Entries and Pages,”](#) on page 66.

A.4 Easy Folder and Workspace Management

- ♦ [Section A.4.1, “Subscribing to Folders,”](#) on page 118
- ♦ [Section A.4.2, “E-Mailing Entries into a Folder,”](#) on page 118
- ♦ [Section A.4.3, “Identifying Unread Entries in a Folder or Workspace,”](#) on page 119
- ♦ [Section A.4.4, “Identifying New Entries in a Folder or Workspace,”](#) on page 119
- ♦ [Section A.4.5, “New Discussion Folder Features,”](#) on page 119
- ♦ [Section A.4.6, “New Blog Folder Features,”](#) on page 119
- ♦ [Section A.4.7, “New Wiki Folder Features,”](#) on page 119
- ♦ [Section A.4.8, “New Photo Album Features,”](#) on page 119

A.4.1 Subscribing to Folders

Teaming 2.0 enables you to subscribe to folders and configure them to notify you of any activity in the folder.

For more information on subscribing to folders, see [Section 2.12, “Subscribing to a Folder or Entry,”](#) on page 36.

A.4.2 E-Mailing Entries into a Folder

Teaming 2.0 enables you to define simple URLs for folders and workspaces. When you define a simple URL for a folder, you can add entries to the folder via e-mail.

For more information on defining a simple URL for a folder, see [Section 5.1.10, “Adding Entries to a Folder Via E-Mail,” on page 64](#).

A.4.3 Identifying Unread Entries in a Folder or Workspace

Teaming 2.0 enables you to quickly identify all entries that you have not yet read in a folder or workspace.

For more information on how to identify unread entries in a folder or workspace, see [Section 2.4, “Finding What’s Unread,” on page 28](#).

A.4.4 Identifying New Entries in a Folder or Workspace

Teaming 2.0 enables you to quickly identify all entries that are new in a folder.

For more information on how to quickly identify all new entries in a specific folder or workspace, see [Section 2.2, “Finding What’s New,” on page 27](#).

A.4.5 New Discussion Folder Features

Teaming 2.0 supports new features for Discussion folders, such as the ability to “pin” entries, open entries in place, and mouse over entries to display a short content preview.

For more information, see [Section 5.3.1, “Discussion,” on page 67](#).

A.4.6 New Blog Folder Features

Teaming 2.0 supports new features for Blog folders, such as Blog Pages that enable you to better organize Blog folders, an *Archives* section, and a completely new layout.

For more information, see [Section 5.3.2, “Blog,” on page 68](#).

A.4.7 New Wiki Folder Features

Teaming 2.0 supports new features for Wiki folders, such as Wiki Topics that enables you to better organize Wiki folders, an *Archives* section, and a completely new layout.

For more information, see [Section 5.3.11, “Wiki,” on page 78](#).

A.4.8 New Photo Album Features

Teaming 2.0 supports new features for Photo Album folders, such as the ability to create nested Photo Albums, and an *Archives* section, enabling you to better organize Photo Album folders. Also, when viewing photos in Teaming 2.0, you can easily scroll through pictures by clicking the navigation arrows.

For more information, see [Section 5.3.8, “Photo Album,” on page 73](#).

A.5 Skype Integration

Kablink Teaming has the capability to integrate with Skype, enabling you to communicate with other Teaming users through Skype, without needing to leave the Teaming interface.

This feature must first be configured by your administrator before you can use Skype from within Teaming.

For more information on how to use Skype with Teaming, see [Section 8.2, “Using Skype From within Teaming,” on page 107](#).

A.6 Advanced User Enhancements

For a list of advanced features that are new in Teaming 2.0, see “[What’s New in Teaming 2.0](#)” in the *Kablink Teaming 2.0 Advanced User Guide*.

Troubleshooting

B

The following sections provide guidance for difficulties you might encounter when using Kablink® Teaming:

- ♦ [Section B.1, “Your Presence Icon Does Not Change Color,” on page 121](#)
- ♦ [Section B.2, “WebDAV Link Does Not Work,” on page 121](#)
- ♦ [Section B.3, “Too Many Sign-Ins for WebDAV,” on page 122](#)
- ♦ [Section B.4, “WebDAV Phantom Folders,” on page 122](#)
- ♦ [Section B.5, “Cannot Rename Attached Files through WebDAV,” on page 122](#)
- ♦ [Section B.6, “Unable to Open Pictures from WebDAV in Microsoft Office Picture Manager,” on page 122](#)
- ♦ [Section B.7, “Unable to Edit Files that Are Attached to Entries,” on page 123](#)
- ♦ [Section B.8, “Cannot Upload a File Because it Is Too Large,” on page 124](#)
- ♦ [Section B.9, “Upload Applet Problems on SLED 10 SP1,” on page 125](#)
- ♦ [Section B.10, “Teaming Applets Are Not Working on a 64-Bit Operating System,” on page 125](#)
- ♦ [Section B.11, “Teaming Applets Are Not Working on a Safari Web Browser,” on page 126](#)
- ♦ [Section B.12, “Edit-In-Place Applet Is Not Working on Mac,” on page 127](#)

B.1 Your Presence Icon Does Not Change Color

Problem: When you sign in and view Kablink Teaming 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 is no presence information for you (white):

- 1 View your personal workspace.
- 2 Click *Modify profile*.
- 3 In the Conferencing User Name field, type your Conferencing username for Kablink Conferencing and its Pidgin client.
- 4 Click *OK*.

If your presence icon indicates that you are offline (gray) when you are signed in:

- 1 Start the Pidgin client on your computer.
For more information about installing and running the Conferencing Pidgin client on your computer, see your Teaming administrator.

B.2 WebDAV Link Does Not Work

Problem: When you click the *View this folder as a WebDAV folder* link in the footer toolbar or the icon used to attach a file through WebDAV, the WebDAV window does not function properly.

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

B.3 Too Many Sign-Ins for WebDAV

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

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

B.4 WebDAV Phantom Folders

Problem: When using Kablink Teaming to access a WebDAV folder, you might see a link to a subfolder that does not exist (a phantom folder). Clicking the link to the phantom folder returns you to your current folder (therefore, it has no effect).

This error is caused by an interaction between WebDAV and Windows Explorer, it does not occur consistently, and there is no Teaming solution for this problem. Simply ignore phantom folders after you encounter them.

B.5 Cannot Rename Attached Files through WebDAV

Problem: You cannot rename a file through WebDAV when you are using the *Access Attachments Using WebDAV* link.

The *Access Attachments Using WebDAV* link should be used only as an alternative means of uploading and deleting files; renaming files is not supported through this link.

To rename a file through WebDAV:

- 1 Navigate to the File folder where the entry attachment resides.
- 2 In the footer toolbar, click *View this folder as a WebDAV folder*.
- 3 Log in to your WebDAV folder, then rename the file.

B.6 Unable to Open Pictures from WebDAV in Microsoft Office Picture Manager

Problem: When you are attempting to open pictures from WebDAV in Microsoft Office Picture Manager, you see the following error message:

Picture Manager is unable to open pictures over the Internet that are not from a Windows SharePoint Services picture library. Please specify a valid picture library and try again.

This message occurs because Microsoft Office Picture Manager does not support the standard WebDAV protocol.

To work around this problem:

- 1 Copy the picture file to your local machine, then open the file using whatever photo viewer you want.

B.7 Unable to Edit Files that Are Attached to Entries

Problem: You are unable to edit files that are attached to entries.

If you are unable to edit a file, Kablink Teaming might not be configured to support the editing application that is installed on your computer. For example, if Teaming is configured to use Microsoft Word as the default editor for all text files, but you have OpenOffice instead of Microsoft Word installed on your computer, Teaming displays an error, and won't edit the document.

To fix this problem, Teaming enables you to override the default editor setting.

- ♦ [Section B.7.1, “Changing the Default Editor Settings for a Single File Type,” on page 123](#)
- ♦ [Section B.7.2, “Changing the Default Editor Settings for All File Types,” on page 123](#)
- ♦ [Section B.7.3, “Changing the Default Editor Settings When the Editor is Not Installed in the Default Location,” on page 124](#)

B.7.1 Changing the Default Editor Settings for a Single File Type

- 1 In the main sidebar, in the *Personal Preferences* section, click *Define Editor Overrides*.
- 2 Click *Add*.
- 3 From the drop-down list, select the file extension for which you want to change the default editing application.
- 4 In the *Application* field, specify the name of the application that you want to use to edit the type of files that you selected in [Step 3](#).
- 5 Select the check box, then click *OK*.

B.7.2 Changing the Default Editor Settings for All File Types

You can configure Teaming to use the same editing application for all file types.

- 1 In the main sidebar, in the *Personal Preferences* section, click *Define Editor Overrides*.
- 2 Click the *Use* drop-down list, then select the application that you want Teaming to use to edit all file types.
- 3 Select the check box to the left of *Extension*, then click *OK*.

B.7.3 Changing the Default Editor Settings When the Editor is Not Installed in the Default Location

- 1 In the main sidebar, in the *Personal Preferences* section, click *Define Editor Overrides*.
- 2 In the *Extension* column, ensure that the correct file extension is selected in the drop-down list.
For example, if your OpenOffice application is installed in a location other than the default location, and you want Teaming to recognize the unique location, ensure that `.odt` is selected in the *Extension* column.
- 3 In the field in the *Application* column, specify the path to the application that you selected in [Step 2](#).
For example, if your OpenOffice application is installed in a location other than the default location, and you want Teaming to recognize the unique location, specify the pathname to the OpenOffice application.
- 4 Click *OK*.

B.8 Cannot Upload a File Because it Is Too Large

Problem: You are having trouble uploading a file because the file is too large.

You might be able to fix this problem by increasing the default amount of memory used by Java* applets.

- ♦ [Section B.8.1, “Increasing the Default Memory Amount on Windows,” on page 124](#)
- ♦ [Section B.8.2, “Increasing the Default Memory Amount on Linux,” on page 124](#)

B.8.1 Increasing the Default Memory Amount on Windows

- 1 Navigate to the Control Panel (Click *Start* > *Settings* > *Control Panel*).
- 2 Double-click *Java*.
The Java Control Panel is launched.
- 3 Select the *Java* tab.
- 4 In the *Java Applet Runtime Settings* section, click *View*.
- 5 For each of your Java Runtime Versions, add `-Xmx256m` as a Java Runtime Parameter.
- 6 Click *OK*.
After increasing the default memory size for Java applets, you must exit all browsers and restart them before the change can take effect.

This setting causes the applet used for uploading files into a Teaming folder to start up with 256 MB of memory. If the applet still indicates that there is not enough memory to run the applet, you might need to reduce this number.

B.8.2 Increasing the Default Memory Amount on Linux

- 1 Locate the JRE* or JDK* being used for the browser plug-in.
The location of the JRE or JDK varies depending on your system.
- 2 In the `bin` directory of the JRE or JDK, run the `ControlPanel` file.

The Control Panel is launched.

- 3 Select the *Java* tab.
- 4 In the *Java Applet Runtime Settings* section, click *View*.
- 5 For each of your Java Runtime Versions, add `-Xmx256m` as a Java Runtime Parameter.
- 6 Click *OK*.

After increasing the default memory size for Java applets, you must exit all browsers and restart them before the change can take effect.

This setting causes the applet used for uploading files into a Teaming folder to start up with 256 MB of memory. If the applet still indicates that there is not enough memory to run the applet, you might need to reduce this number.

B.9 Upload Applet Problems on SLED 10 SP1

Problem: When you use Kablink Teaming in a browser running on SUSE® Linux Enterprise Desktop (SLED) 10 SP1, dragging and dropping picture files onto the upload applet results in the pictures being displayed in the browser instead of being added to the Teaming entry as attachments. This problem was reported by a user running a Firefox Version 2.0.0.12 browser, but the problem can also appear with other browsers.

In future releases of SLED, this problem might not occur if the Java JRE software is updated. Until then, you can either use the HTML form method of uploading files (the icon is next to the icon for the upload applet). You can also use the following procedure as a workaround for the problem:

- 1 Use your windowing software to select and copy the photo files to your windowing system clipboard.
- 2 Click the *Multi-file upload* icon, which is the left icon in the set for adding attachments to the entry.

Teaming displays the upload applet underneath the upload icons.

- 3 Right-click the *Upload applet* icon (a blue folder) within the upload applet box.
- 4 Select *Paste*.

Teaming attaches the pictures to the entry.

B.10 Teaming Applets Are Not Working on a 64-Bit Operating System

Problem: If you are using a 64-bit operating system with a 64-bit version of Firefox (this is the default browser for some Linux 64-bit operating systems), the following Kablink Teaming applets do not work:

- ♦ The Add Files to Folder applet. This applet enables you to drag files from one location and drop them into a Teaming folder. It also enables you to copy and paste files into a Teaming folder.
- ♦ The Edit in Place applet. This applet enables you to easily edit files that are attached to entries.
- ♦ The Workflow Graphical Display applet. This applet enables you to graphically view the setup of your workflows.

Solutions:

You can solve this problem in either of the following ways:

- ♦ [Section B.10.1, “Change Your Browser to a 32-Bit Version of Firefox,” on page 126](#)
- ♦ [Section B.10.2, “Install a 64-Bit Java Browser Plug-In,” on page 126](#)

B.10.1 Change Your Browser to a 32-Bit Version of Firefox

A simple solution to this problem is to run a 32-bit version of Firefox on your 64-bit operating system.

- 1 Install a 32-bit version of Firefox.
- 2 Install the 32-bit Java browser plug-in into the 32-bit version of Firefox that you installed in [Step 1](#).

The Teaming applets now work as expected.

B.10.2 Install a 64-Bit Java Browser Plug-In

If you want to keep your 64-bit browser, you can solve this problem by installing a 64-bit Java browser plug-in, and a version of Firefox greater than 3.0.

- ♦ [“Install a 64-Bit Java Browser Plug-In” on page 126](#)
- ♦ [“Install Firefox 3.0 or Higher” on page 126](#)

Install a 64-Bit Java Browser Plug-In

- 1 Download and install a 64-bit Java browser plug-in.

Install Firefox 3.0 or Higher

The Java browser plug-in that you installed in [“Install a 64-Bit Java Browser Plug-In” on page 126](#) supports only Firefox 3 or higher.

- 1 Download and install Firefox 3 or higher.

B.11 Teaming Applets Are Not Working on a Safari Web Browser

If you are using Safari* on Mac*, the following Kablink Teaming applets do not display. These applets are not supported with the Safari Web browser:

- ♦ The Add Files to Folder applet. This applet enables you to drag files from one location, and drop them into a Teaming folder. It also enables to you copy and paste files into a Teaming folder.
- ♦ The Edit in Place applet. This applet enables you to easily edit files that are attached to entries.
- ♦ The Workflow Graphical Display applet. This applet enables you to graphically view the setup of your workflows.

B.12 Edit-In-Place Applet Is Not Working on Mac

All Teaming applets work when using Firefox on Mac. However, the Edit-in-Place applet might not work if you have installed OpenOffice anywhere other than the default location.

To fix this problem:

- 1 Ensure that OpenOffice is installed at this location: `/Applications/OpenOffice.org.app`.

If OpenOffice is not installed, you must install it.

If you have installed OpenOffice somewhere other than the default location, you must specify this location in the *Define Editor Overrides* section in Teaming, as described in [Section B.7.3, “Changing the Default Editor Settings When the Editor is Not Installed in the Default Location,”](#) on page 124.

If the problem persists, consult your Teaming administrator.

Accessibility for People with Disabilities

C

Users with disabilities can use assistive technology (AT) such as a screen reader to access Kablink® Teaming pages. AT users must adapt to the following Teaming functionality:

- [Section C.1, “New Windows Opened without Notification,” on page 129](#)
- [Section C.2, “Text Added to a Page Is Not Conveniently Available,” on page 129](#)
- [Section C.3, “Drop-Down List Access,” on page 129](#)

C.1 New Windows Opened without Notification

When you click certain areas in Kablink Teaming, the Teaming interface opens new windows. However, Teaming does not notify the AT user that it is opening a new window. As AT users become familiar with Teaming, they identify and remember where new windows are opened.

C.2 Text Added to a Page Is Not Conveniently Available

For some actions, Kablink Teaming adds text to a page that is already displayed. However, AT software is not able to recognize that new text has been added unless the page is refreshed. After the page refreshes, the newly added text is available at the bottom of the page. The AT user must move to the bottom of the page and then move backwards up through the new content.

C.3 Drop-Down List Access

In fields where you type text and a drop-down list appears, press Enter to move the focus into the list. Press Tab to move down through the list, then press Enter to select an item in the list.

