Kablink Teaming 3 Beta

September 13, 2010

Quick Start

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.

Upgrading to Kablink Teaming 3

When you upgrade to Teaming 3 from a previous version of Teaming, you must clear your browser's cache in order for Teaming to display correctly.

For example, if you are using Mozilla Firefox, click *Tools* > *Clear Cache* in the browser toolbar.

For information about how to clear the browser cache for other browsers, consult the documentation for your specific browser.

Starting Kablink Teaming

1 Launch a Web browser (such as Mozilla Firefox or Internet Explorer).

2 Specify the URL of your corporation's Teaming site.

3 In the *User ID* field, specify your Teaming username.

4 In the *Password* field, specify your Teaming password.

If you do not know your Teaming username and password, contact your Teaming administrator.
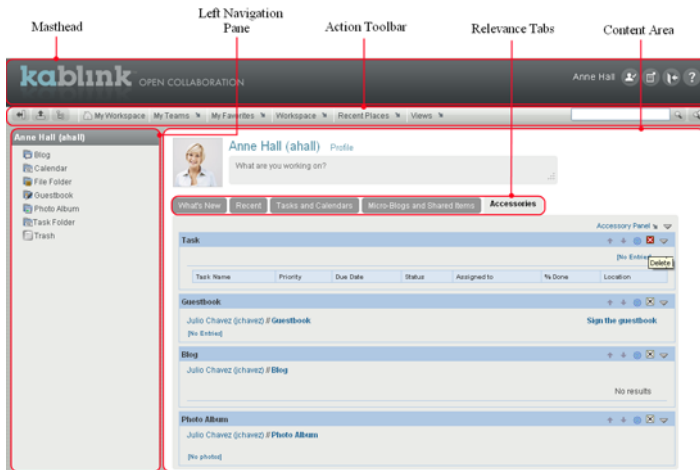
5 Click *OK*.

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*.

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:

UNDERSTANDING THE MASTHEAD

The Masthead contains the following features:

Personal Workspace Link: Quickly access your personal workspace by clicking your linked name.

Personal Preferences: Displays your personal preferences, such as the way you want entries to be displayed and how many entries you want to appear on a given page.

Teaming Feed: Displays live feeds of the latest entries in your teams, places you are following, or across the entire site.

Log Out: Logs you out of the Teaming site.

Help Documentation: Displays the Teaming Help documentation.

UNDERSTANDING THE NAVIGATION PANEL

The Navigation panel contains a navigation tree that displays the current workspace and all sub-workspaces and sub-folders.

UNDERSTANDING THE ACTION TOOLBAR

The Action toolbar contains the following features:

Expand/Contract Left Navigation Icon: Hides and displays the Left Navigation pane.

Expand/Contract Header Icon: Hides and displays the Masthead.

Workspace Toolbar Icon: Displays the Workspace toolbar, which enables you to quickly navigate to any location where you have appropriate rights.

My Workspace: Displays your personal workspace.

My Teams: Displays links to all of the team workspaces where you are a member.

My Favorites: Enables you to add a place as a favorite, or to quickly visit your favorite places on the Teaming site.

Workspace: (This option is displayed only when you are viewing a workspace) Provides various functions that enable you to manage the workspace, including adding new folders, managing access control, configuring the workspace, and more.

Folder: (This option is displayed only when you are viewing a folder) Provides various functions that enable you to manage the folder, including adding new folders, managing access control, configuring the folder, and more.

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

View: Enables you to accomplish various tasks, such as see what's new or unread in the workspace or folder, view who has access, view the Teaming clipboard, and access the Teaming Trash.

Search: Enables you to search the entire site for entries, places, and people. You can locate subject-matter experts, or see what information is available concerning a particular topic.

Click the *Search Options* icon if you want to specifically search for a person, place, or a tag. You can also use a saved search or perform an Advanced Search.

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 be informed on new entries, upcoming tasks, your daily meetings, and more.

What's New: Enables you to quickly see new entries in your teams, places you are following, or across the entire site.

Recent: Enables you to view entries that you have recently posted, and entries that you have recently visited. Also, you can view who has recently visited your workspace.

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

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

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

UNDERSTANDING THE CONTENT AREA

The Content Area in Teaming is where the majority of information is displayed, such as workspaces, folders, and entries.

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.

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.

Another reason to modify your profile is to publicize your skills and past experience to other Teaming users. One advantage of Teaming is the ability to find experts on any subject within your organization. You, as a Teaming user, have the ability to be a subject-matter expert.

NOTE: If you are unable to modify your personal information (such as your Teaming password) as described in this section, it is most likely because your personal information is being synchronized from an external directory server. You must consult your Teaming administrator to make changes.

1 In the home page of your personal workspace, click the *Profile* link next to your name and avatar.

   or

   Click your *Presence* icon , located next to any entry that you have created or modified.

   Your profile is displayed.

   If you are a new user, your profile probably does not currently contain much information.

2 Click *Edit* in the upper right corner of the profile.

   The User page is displayed.

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*.

BRANDING YOUR WORKSPACE

Adding a personal brand to your workspace can enhance the appearance of your workspace and make you feel more at home.

1 Navigate to your personal workspace.

2 Click *Workspace* > *Brand Workspace*.

   The Workspace/Folder Branding dialog box is displayed.

3 Specify the following information to create your desired brand.

   Use Branding Image: Select this option if you want to use the drop-down list to select an existing image, or click the *Browse* icon   to browse to an image on your computer's file system.

   Use Advanced Branding: Select this option, then click *Advanced* if you want to create a brand that includes advanced features, such as a YouTube video.

   You can add a YouTube video in your branding section by clicking the *Video* icon .

   Background Image: Use the drop-down list to select an existing image, or click the *Browse* icon   to browse to an image on your computer's file system.

   The background image is displayed behind your regular branding.

   Stretch Image: Stretches the background image so that it occupies the entire branding area.

   If you stretch your background image, the image overrides any background color that you have set.

   Background Color: Adds a background color that occupies the entire branding area. To change the background color, click the color name to the right of this field, select the new color, then click *OK*.

   If you added a background image and stretched the image, the background color is not displayed.

   Text Color: Changes the text color of the workspace name in the upper right corner of the branding area. To change the text color, click the color name to the right of this field, select the new color, then click *OK*.

   Clear branding: Click this option to clear all your current branding selections.

4 Click *OK*.

   Your workspace now displays the brand that you created.

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 Click the *Browse* icon 🗁 in the Action toolbar, then expand *Home Workspace* in the Workspace tree.

  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*.

  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.

  The Add a Team Workspace page is displayed.

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.

  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.

  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.

Using Kablink Teaming Folders

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

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

Displaying Help Documentation

1 Click the Teaming *Help* icon ⍰ , located in the upper right corner of each Teaming page.

When you click this icon, Teaming displays the Teaming User Guide in a new browser window.