OpenText Vibe 4.0.8 User Quick Start

March 2024

Quick Start

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

Starting OpenText Vibe

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

2 Go to the URL of your corporation's OpenText Vibe site.

3 In the **User ID** field, specify your Vibe user name.

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

   If you do not know your Vibe user name and password, contact your Vibe administrator.

5 Click **OK**.

Getting to Know the Vibe Interface and Its Features

When you first launch Vibe you see the What's New page. This page shows you what's new in your teams, favorite places, and more.

Understanding the Masthead

The Masthead contains the following features:

Name Link: Click your linked name in the upper right corner of any Vibe page to view the following options:

- **Data Quota information:** (Conditional) Your current data quota and the amount of your quota that you have used are displayed.

  If this option is not displayed, the Vibe administrator has not restricted you to a data quota.

- **View Profile:** Displays your Vibe profile.

- **Personal Preferences:** ⊙ Displays your personal preferences. You can configure the following personal preferences:

  - **Entry Display:** Specify the default behavior when clicking a file name.
  - **Items per Folder Page:** Specify how many entries you want to appear on a given page.
  - **Hide 'Public' Collection:** Select this option to hide the Public icon 🌐 in the masthead so that it is no longer displayed in the web client.
  - **Define Editor Overrides:** This feature allows you to change the default editor settings for editing files.

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

- **Vibe Resource Library:** ◉ Displays the Vibe Resource Library, which includes additional information and resources, including downloadable custom forms and workflows, relevant articles, and more.

- **Change Password:** 🔒 Specify your current and new password. For more information, see "Changing Your Password" on page 5.

- **Help:** ❓ Displays the *Vibe Web Application User Guide*.

- **Download Vibe Desktop App:** (Conditional) Displays the Vibe desktop app download page.

  If this option is not available, the Vibe administrator has not enabled it.

- **Sign out:** Signs you out of the Vibe site.

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 Navigation Panel Icon: ◁ Hides and displays the Navigation panel.

Expand/Contract Masthead 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.

What's New: Displays the What's New page, where you can quickly see what's new in your teams, favorite places, and more.

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

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

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

View: Enables you to accomplish various tasks, such as seeing what's new or unread in the workspace or folder, viewing who has access, viewing the Vibe clipboard, and accessing the Vibe 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 of 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. You can view who has recently visited your workspace, as well as see your personal tags.

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.

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

Understanding the Content Area

The Content Area in Vibe 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 OpenText Vibe, 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 email address, phone number, time zone, and picture.

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

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

---

1 Click your linked name in the upper right corner of any Vibe page.
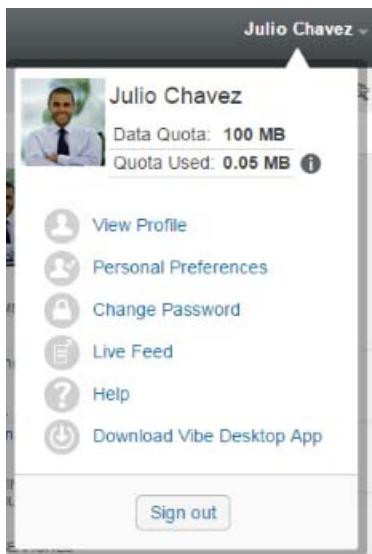
2 Click **View Profile**.

3 Click **Edit**, make any necessary changes, then 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 Next to the workspace name, click the **Configure** icon ⚙, then click **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: Click the **Browse** icon ⬚ to browse to an image on your computer's file system. The provided drop-down list contains images only if you are branding a team workspace and if you have attached images to the workspace.

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 of your current branding selections.

4 Click OK.

Your workspace now displays the brand that you created.

Changing Your Password

Only local and external users can change their passwords as described in this section. If you cannot change your Vibe password as described in this section, contact your Vibe administrator.

1 Click your linked name in the upper right corner of any Vibe page.

2 Click Change Password.

The Change Password dialog box is displayed.

3 Specify your current password, then specify and confirm the new password.

4 Click OK.

Creating a Team Workspace

By default, everyone in OpenText Vibe 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 New Workspace.

The New Workspace page is displayed.

If you do not see the New Workspace 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, click the name of the directory where you want to create the new team workspace,

then, next to the workspace name, click the Configure icon ⚙. Click New Workspace. Ensure that you select Team Workspace in the Workspace section.

4 Specify the following information:

Workspace Title: Provide a title for the workspace.

Workspace: Select Team 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.

5 Click OK to create the new workspace.

Using OpenText Vibe Folders

OpenText Vibe 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

Vibe 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 Vibe 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.

Files

Files folders in Vibe make it easy to store and keep track of your files. You can store personal files in the Files 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.

Milestones

Milestones folders track the progress of several Tasks folders. Milestones folders are most often used in those workspaces, although they can also be used in other workspaces.

Micro-Blog

The Micro-Blog folder in Vibe 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.

Mirrored Files

Mirrored Files folders use a reference to a file system on an external server, instead of the Vibe file system where other Vibe information is stored. Mirrored Files folders can reference any WebDAV or local file path.

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.

Surveys

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

Tasks

Tasks folders keep track of the progress made in completing work assignments. Vibe enables you to create a Tasks folder in any workspace that you desire. You can maintain a personal Tasks folder in your personal workspace, and then add separate Tasks 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.

Legal Notice