

Video Tutorials

Novell® Teaming

2.0

Authorized Beta

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About This Guide

This guide is the script for the tutorial videos that you can find in the Teaming product. These tutorial videos provide information on how to accomplish basic Teaming tasks.

Each section of this book represents a separate tutorial video.

- ♦ Chapter 1, “What Is Teaming?,” on page 9
- ♦ Chapter 2, “Getting Started,” on page 13
- ♦ Chapter 3, “Getting Informed,” on page 17
- ♦ Chapter 4, “Navigation,” on page 21
- ♦ Chapter 5, “Customizations,” on page 25

Audience

This guide is intended for all 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/teaming2/feedback.html and enter your comments there.

Additional Documentation

For additional Teaming documentation, see [The Novell Teaming 2 Beta documentation page \(http://www.novell.com/documentation/teaming2/\)](http://www.novell.com/documentation/teaming2/).

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What Is Teaming?

1

- ♦ Section 1.1, “Overview,” on page 9
- ♦ Section 1.2, “Customizing Your Personal Workspace,” on page 9
- ♦ Section 1.3, “Creating a Team Workspace,” on page 10
- ♦ Section 1.4, “Getting Informed,” on page 11
- ♦ Section 1.5, “Navigation,” on page 11
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1.1 Overview

Did you know that in one large company, 20% of surveyed employees have never met their managers face-to-face, and that half of those never expect to? How can people work effectively together when they are physically scattered in different locations?

The answer is all about enterprise social networking and peer-to-peer collaboration around the block and around the world.

Given the proper tools, employees in different locations can productively work together online, just as they would if their offices were right next door.

Employees can even have those spontaneous over-the-wall cubicle chats, the informative hallway exchanges, and the casual break room brainstorming sessions. How is all this possible? With Teaming 2.0.

To see how Teaming helps colleagues work together no matter where they are, let's follow Julio Chavez, a new employee in the Marketing department at Green Energy Power Company. Julio has been placed in a new group that is overseeing the firm's latest and most high-profile internal mandate, to “go paperless.” Julio is the lead writer on the writing team that will be covering the progress of the project.

As part of his new-employee orientation, Julio received in-depth training about how to get the most out of Teaming 2.0. He's been told that his coworkers haven't received their scheduled training yet, so Julio is excited to jump in and help the new team come up to speed fast.

1.2 Customizing Your Personal Workspace

Before Julio take's advantage of all of the features and functionality of Teaming 2.0, he decides to customize his personal workspace.

- 1** In his Web browser, Julio displays the Teaming login page, types the username and password he received during orientation, then clicks *OK*.
- 2** Julio decides to use his first personal blog entry to present his professional credentials to his coworkers.
 - 2a** In the Main Sidebar, Julio clicks his Blog folder, then clicks *Add Blog entry*.
 - 2b** In the *Title* field, he types `Resume of Julio Chavez`.
 - 2c** In the body of the Blog entry, he pastes the most recent section of his resume.

- 2d** Then Julio decides to attach his full resume, so he clicks *Browse*, locates his resume on the flash drive containing files he brought to work with him, and attaches it to his Blog entry. This advertises his skills and expertise throughout the company, so that others can take advantage of his education and experience.
- 2e** Julio clicks *OK* and sees his first personal Blog entry, then he returns to the homepage of his personal workspace.
- 3** Next, Julio decides to help his coworkers get to know him by providing some personal information in his workspace.
 - 3a** Julio clicks the *Profile* tab and sees that there's not much there yet, so he clicks *Modify profile*.
 - 3b** In the *Phone* field, he types his office phone number, so his coworkers can call him.
 - 3c** In the *Time Zone* field, he selects his time zone, so his coworkers know what time it is in his local office.
 - 3d** In the *Picture* field, he clicks *Browse*, retrieves a personal photo from his flash drive, then clicks *OK*.

Now Julio's new coworkers can see what he looks like, even though he hasn't met them in person.
- 4** Julio greets his new coworkers by making an entry in his MiniBlog. When he clicks *OK*, the entry is added to his personal workspace so coworkers can see it when they come to visit.

Now that Julio has customized his personal workspace, he wants to help his colleagues leverage the features and functionality of Teaming 2.0. Julio plans to create a team workspace, get informed on team objectives and help team members get informed, explore the various navigation methods available in Teaming, and possibly customize his team workspace and create custom workflows and forms to help respond to the specific needs of the team.

These sections are explained in greater detail in the subsequent tutorial videos.

1.3 Creating a Team Workspace

From his new-employee orientation, Julio knows that the Green Energy Power Teaming site is organized into workspaces. A workspace is a collection of folders and other workspaces. It is designed to connect interested people and related information so they can coordinate their efforts and work in a common environment.

Julio has already visited the global workspace, where company news is posted for all employees. He has also customized his own personal workspace.

Julio plans to create a team workspace where the Paperless Initiative Articles team can coordinate their activities, find the information they need, develop their ideas, and manage their projects.

Julio knows that a workspace can include many different kinds of folders.

He knows he needs a File folder where he can share the documents that he brings with him on his flash drive. Each file becomes an entry in the File folder, where team members can review Julio's documents and add comments about them. Multiple versions of files can be maintained as part of document management.

Julio plans to create a Wiki folder where he and Anne Thompson, the other writer, can work together on articles. Each issue of the magazine has an entry in the Wiki folder where articles are stored. Other team members can monitor the writers' progress for each issue and even edit an article themselves if they have relevant insights to share.

Julio also wants to set up a Discussion folder, where all team members can ask questions, provide answers, and establish team policies. All team members can comment on any discussion thread, as important decisions are reached.

Julio believes that, as the team grows, they will add other kinds of folders, such as a Calendar folder to track publishing schedules and a Task folder to help keep up with what needs to be done next for each article.

He can add other folders as the team requires.

1.4 Getting Informed

Julio knows that their editor, Ida McNamee, needs to keep track of which articles need to be edited and when. Using Teaming, she can do several things:

- ♦ She can quickly find new entries in any folder in the team workspace.
- ♦ She can keep up with what the writers are doing and with their progress on articles.
- ♦ She can share her own activities with her team members.
- ♦ She can receive notification by e-mail or text message so she can stay up-to-date when she's not logged in to the Teaming site.

1.5 Navigation

Julio suspects that Green Energy Power's growing store of imported data can provide a wealth of detailed collective knowledge that he might want to reference in his articles. To locate this valuable information, Julio has several alternatives:

- ♦ He can browse through publicly available workspaces, looking for relevant information. This approach provides the complete context of where the information was created, which reveals how workspaces and projects relate to each other.
- ♦ He can use the Find feature to go directly to entries associated with subject matter experts and related places where relevant information might be found.
- ♦ He can use the powerful Search feature to locate entries of interest anywhere in the Teaming site. The entries might be documents, presentations, spreadsheets, calendars, timelines, images, wikis, blogs, custom forms, or any other materials stored in the Teaming site.

As he discovers pertinent information, Julio can do different things with it:

- ♦ He can build a Favorites list of places that he wants to explore in more detail over time.
- ♦ He can quickly and easily return to recently visited places.
- ♦ He can tag especially relevant information throughout the Teaming site so that it can be easily gathered into a "virtual folder" that represents a particular topic of interest.

1.6 Customizations

Julio looks forward to the time when he and his team can implement some of the more advanced Teaming features.

- ♦ Julio wants to brand the team's workspace, so that its appearance reflects the function and personality of the team.
- ♦ He wants to set up a team landing page to highlight the most important entries from anywhere in the team workspace.
- ♦ The editor wants Julio to create a custom form for writers to use when notifying her that an article is ready for editing. Julio is delighted that he doesn't need to consult a Webmaster in order to set up the right custom form to meet his editor's exacting scheduling requirements.
- ♦ Julio's manager wants him to set up an automated workflow to make the repeated article approval process more efficient and reliable. Julio is relieved that he can do what his manager wants in a simple Web interface, without needing to learn an extra design tool.

Julio is glad that his team members can learn how to do all the things he's planned by watching the video tutorials on the Teaming site.

- ♦ Section 2.1, “Creating a Team Workspace,” on page 13
- ♦ Section 2.2, “Adding Additional Team Members to Your Workspace,” on page 13
- ♦ Section 2.3, “Announcing The Workspace After Its Creation,” on page 14
- ♦ Section 2.4, “Adding Additional Folders to Your Workspace,” on page 14
- ♦ Section 2.5, “Adding Content to Your Workspace,” on page 14
- ♦ Section 2.6, “Summary,” on page 16

2.1 Creating a Team Workspace

Julio has already created his personal workspace and visited the team workspaces where he is already a member. He decides that it would accelerate productivity to create a team workspace where he and Anne, his co-author on the project, can brainstorm, share ideas, post rough drafts, share files, post deadlines, and make their progress visible to their manager, Karl Jones. They can even hold online, real-time meetings when they use Teaming 2.0 in conjunction with Conferencing.

- 1 To create a team workspace, Julio expands *Home Workspace* in the Workspace Tree Navigation tool, located near the top of the Teaming interface.
- 2 He selects *Team Workspaces*.
- 3 Then he clicks *Add a team workspace*.
- 4 He provides a title for the workspace.
- 5 He specifies the team members. Julio is automatically a member of the team, so he starts typing his manager’s name, Karl Jones, and selects Karl’s name from the list. He then types Anne Thompson, and selects her name.
- 6 Julio selects the folders that he wants his team workspace to contain. He adds a File folder where team members can upload pertinent files. If he decides later that his team would benefit from additional folders, he can add those at any time.
- 7 He announces the team workspace so Anne and Karl know it’s available, and he explains some of the reasoning behind it. He selects the *Announcement* check box and adds the desired text to the *Announcement text* field.
- 8 He clicks *OK* to save his changes.
The team workspace has now been created, and an announcement message has been sent to the team members.

2.2 Adding Additional Team Members to Your Workspace

Julio’s manager informs him that George Kenopolis from the Public Relations department will be joining his team. Also, an editor, Ida McNamee, has been assigned to work directly with Julio and Anne. Julio needs to bring George and Ida up to speed with what he and Anne have been working on.

The first thing Julio does is add George and Ida to the team workspace.

- 1 Julio navigates to the Paperless Initiative Articles team workspace.
- 2 In the Main Sidebar, in the *Team* section, he clicks *Manage Team*.
- 3 He starts typing George Kenopolis in the *Users* field, then selects his name from the list. He repeats this process for Ida McNamee.
- 4 He clicks *OK*.

2.3 Announcing The Workspace After Its Creation

In order to help Ida and George feel welcome, introduce them to the team, and bring them up to speed with what the team has been working on, Julio announces the team workspace to Ida and George.

- 1 Julio navigates to the Paperless Initiative Articles team workspace.
- 2 In the Main Sidebar, in the *Team* section, Julio clicks *Send Mail To Team*.
- 3 He specifies the team members to whom he wants to announce the workspace, then creates the announcement in the *Message* field.
- 4 He clicks *OK*.

2.4 Adding Additional Folders to Your Workspace

Julio wants to add a publications calendar to the team workspace so the team is aware of what is being published and when, and can plan their schedules accordingly. Because Julio created the workspace and has appropriate rights, he can add the new folder.

- 1 In the Paperless Initiative Articles workspace, he clicks *Manage > Add new folder*.
- 2 He names the folder Publication Calendar.
- 3 He selects *Calendar* as the folder type, then clicks *OK*.

The publication calendar has now been created.

2.5 Adding Content to Your Workspace

For Julio and his team to accomplish their work, they must be able to quickly and easily add content to their team workspace.

- ♦ [Section 2.5.1, “Importing Files,” on page 15](#)
- ♦ [Section 2.5.2, “Adding Wiki Entries and Topics,” on page 15](#)
- ♦ [Section 2.5.3, “Adding Discussions and Discussion Entries,” on page 16](#)

2.5.1 Importing Files

Julio requested some figures from Green Energy's finance department concerning how much money the company spends each month on paper. In response, Julio received an e-mail of last year's office supply expenditures for each month. Julio wants to import the information into a Research folder that he recently created in the team workspace.

- 1 Julio navigates to the Research file folder where he wants to import the documents.
- 2 He clicks *Add File entry*.
- 3 He clicks *Browse*, then browses to and selects the file that he wants to import.
- 4 He adds a description of the file in the *Description* field, then clicks *OK*.

Julio realizes that importing each file individually will take too long. To save time, he uses Teaming drag-and-drop functionality:

- 1 Julio clicks *Add files to folder*.
- 2 This allows Julio to simply drag a file from one location, like his desktop, and drop it onto the folder icon in Teaming.
This adds the document as a new file entry.
- 3 If he wants to, he can click the file, and add a description in the *Description* section, then click *OK*.

Now Julio, and anyone else on the team, has access to these files wherever they have an Internet connection.

2.5.2 Adding Wiki Entries and Topics

- ♦ “Adding Wiki Topics” on page 15
- ♦ “Adding Wiki Entries” on page 16

Because Julio and Anne will be co-authoring each article, they want to set up a structure where they can both easily contribute, without tedious transitions. They decide that a wiki folder is a good framework for composing their articles.

Over the next several months, each issue of the company's magazine will focus on a certain aspect of the initiative. Julio and Anne are responsible for writing several articles about the topic for that month. The first issue will focus on the financial implications of the initiative.

Adding Wiki Topics

In the team workspace, Julio has created a wiki called Article Composition.

Julio wants to add a new wiki topic for each month's theme. A topic is essentially a folder inside of the wiki. By adding a topic for each theme, Julio and Anne stay more organized and are more productive.

- 1 Julio navigates to the Article Composition wiki folder where he wants to create the new topic.
- 2 He clicks *New Wiki Topic*.

- 3 He specifies the topic title in the *Folder title* field. In this case, it's the theme of this month's magazine issue, "Financial Implications."
- 4 He clicks *OK*.

Adding Wiki Entries

Now, Julio wants to start composing an article.

- 1 To add an entry to the wiki topic that he just created, Julio clicks the "Financial Implications" topic in the *Wiki Topics* section.
- 2 He clicks *Add Wiki entry*.
- 3 In the *Title* field, he provides the title for the team's first article.
- 4 In the *Description* field, Julio begins writing the article.
- 5 He clicks *OK*.

Using a wiki, Julio has set up a structure where both he and Anne can easily contribute.

2.5.3 Adding Discussions and Discussion Entries

Now that Julio and Anne are working on their projects and the team is up and running, team members have been e-mailing Julio questions like, "What template are we using?" "When is the deadline for the "Office of the Future" article?" "At what point do the articles need to be edited?" and so on. Sometimes Julio has to answer the same question for multiple people. Or, when he doesn't know the answer, he has to forward e-mail to members of the team who do.

Julio has created a Discussion folder in the team workspace where team members can ask and answer questions, knowledge holders can be quickly identified, and answers can be quickly provided. Julio has named this folder "Article Discussions."

- 1 Anne is wondering when the deadline for a certain article is. She navigates to the Article Discussion folder in the team workspace to post her question.
- 2 She clicks *Add Discussion entry*.
- 3 She provides a title for the new discussion, then types her question into the *Description* field.
- 4 Then she clicks *OK*.

Now, the entire team has the opportunity to provide answers to Anne's question.

2.6 Summary

Through observing Julio and his Paperless Initiative Articles team, we have learned how to create a team workspace and how to add members to a team workspace. Julio also showed us how to announce a workspace during and after workspace creation, as well as how easy it is to add folders to a workspace. We learned about some of the types of content that you can add to workspaces, like files, wikis, and discussions, and how easy it is to add that content.

Ida McNamee is an editor who is new to the Paperless Initiative Articles team. She wants to get informed on what the team has been working on so far.

- ♦ [Section 3.1, “Finding What’s New,” on page 17](#)
- ♦ [Section 3.2, “Tracking Places and People of Interest,” on page 18](#)
- ♦ [Section 3.3, “Viewing Recent Contributions,” on page 18](#)
- ♦ [Section 3.4, “My MiniBlog,” on page 19](#)
- ♦ [Section 3.5, “Viewing Your Coworkers’ MiniBlogs,” on page 19](#)
- ♦ [Section 3.6, “Configuring a Folder to Send E-Mail or Text Message Notifications,” on page 19](#)
- ♦ [Section 3.7, “Summary,” on page 20](#)

3.1 Finding What’s New

One key to effective and efficient teamwork is knowing what people are working on and what they are saying. Teaming 2.0 enables Ida to view the newest files and entries, wikis, discussions, and more. This enables her to quickly learn about the latest issues. She can also use Teaming as a way to keep track of what she’s been working on.

- ♦ [Section 3.1.1, “In a Specific Workspace or Folder,” on page 17](#)
- ♦ [Section 3.1.2, “In Your Teams,” on page 17](#)

3.1.1 In a Specific Workspace or Folder

Because she’s new to the team, Ida wants to quickly see what the team’s been working on most recently. Fortunately, Teaming makes it easy to find new postings, whether you’re searching in a workspace or across the entire site.

- 1 To get a feel for what the team’s been working on, Ida navigates to the Paperless Initiative Articles team workspace.
- 2 She clicks *What’s new*.
Teaming displays the most recent entries.

3.1.2 In Your Teams

Ida can find this same information without leaving her personal workspace.

- 1 In her personal workspace, Ida clicks the *What’s New* tab.
- 2 She selects *My Teams*.
Teaming displays the most recent entries.

3.2 Tracking Places and People of Interest

- ♦ [Section 3.2.1, “Configuring Teaming to Track Folders and People,” on page 18](#)
- ♦ [Section 3.2.2, “Viewing Your Tracked Folders and People of Interest,” on page 18](#)

3.2.1 Configuring Teaming to Track Folders and People

Because Ida will be editing articles written mainly by Julio and Anne, she decides that it would be beneficial if she could track Julio and Anne’s activity in Teaming. That way, she can get involved in every step of an article’s creation, and make herself available to provide ideas and direction, before the articles are submitted for editing.

- 1 Ida navigates to Julio’s personal workspace.
- 2 In the Main Sidebar, she clicks *Track This Person*.
- 3 She then navigates to Anne’s personal workspace.
- 4 In the Main Sidebar, she clicks *Track This Person*.

Also, Julio has created a Task folder called Editing Requests in the team workspace, where Julio and Anne post the articles they are planning to hand off to Ida in the near future. Ida wants to use this folder to better manage her workload, so she decides to track the folder:

- 1 Ida navigates to the Editing Requests folder.
- 2 In the Main Sidebar, she clicks *Track This Folder*.

3.2.2 Viewing Your Tracked Folders and People of Interest

Now, Ida can see what Julio and Anne have been working on, or if they have questions that she can answer. She can also quickly see if there are any new articles they are planning to hand off.

- 1 She simply navigates to her personal workspace and clicks the *What’s New* tab.
- 2 Then she selects *Tracked Places*.

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

Ida sees that Anne, in her MiniBlog, is currently researching about terminology. Ida informs Anne on Anne’s Guestbook that she has posted relevant information in the team Research folder.

3.3 Viewing Recent Contributions

After providing Anne with the research material, Ida wants to get back to the article she was most recently editing.

- 1 To quickly access the article, she navigates to her personal workspace.
- 2 She clicks the *Recent Entries* tab.

The left column lists all of the entries she has most recently edited.

3.4 My MiniBlog

Ida uses the MiniBlog feature to capture quick thoughts and to inform others of what she is currently working on. This provides a greater transparency, so those she works with know her availability and how they might offer assistance to help her accomplish her tasks.

Ida is currently editing Anne's article entitled "Paperless Equals Progress."

- 1 Ida accesses the MiniBlog window in the Main Sidebar from any page within Teaming.
- 2 She types the message that she wants to appear in her MiniBlog.
- 3 Then she clicks *OK*.

3.5 Viewing Your Coworkers' MiniBlogs

Julio has been working on an article that he would like to have edited this afternoon. He checks Ida's MiniBlog to see if she is available to edit the article.

- [Section 3.5.1, "Viewing The MiniBlogs of People You Are Tracking," on page 19](#)
- [Section 3.5.2, "Viewing The MiniBlogs of People You Are Not Tracking," on page 19](#)

3.5.1 Viewing The MiniBlogs of People You Are Tracking

- 1 In addition to the *What's New* tab in his personal workspace, Julio can click the *MiniBlogs and Shared Items* tab to view the MiniBlog entries of the people he is tracking.

The left column of this page is entitled *MiniBlogs*, and displays the MiniBlog entries that his tracked people have submitted.

He reads Ida's most recent MiniBlog, and knows that he has to deliver the article before 2:00 p.m.

3.5.2 Viewing The MiniBlogs of People You Are Not Tracking

- 1 If Ida were not one of the people Julio was tracking, then he could simply navigate to Ida's personal workspace, then select the MiniBlog folder.

If he decides that it would be useful to view Ida's MiniBlog entries on a regular basis, then he can select *Track This Folder*.

3.6 Configuring a Folder to Send E-Mail or Text Message Notifications

Julio wants every member of the team to be aware of the Discussion folder that he recently added to the team workspace. To help team members be aware of new discussion entries, Julio wants to automatically send team members a notification at the end of each day, listing all of the entries that were added to the folder that day. By doing this, Julio hopes that team members who are not currently participating in the Discussion folder in Teaming will begin to participate.

As the folder owner, Julio has rights to configure the folder to suit team members' needs.

- 1 Julio navigates to the folder.
- 2 He clicks *Manage > E-mail Settings*.

3 Julio selects the type of e-mail notification that he wants team members to receive.

4 He selects *Team Members*, then clicks *Apply > Close*.

Now team members who spend time working at home can see the new discussion entries that have been added, and they'll be sure not to miss a thing.

Ida, however, actively participates in the Discussion folder while she is at work, and does not want to be notified about the new entries each night, so she overrides the configuration setting that Julio implemented.

1 Ida navigates to the folder where she wants to override the higher-level notification settings.

2 She selects *E-mail Notification*.

3 Ida ensures that no e-mail address is selected.

4 She selects *Disable notifications set by administrator*.

5 She clicks *OK*.

Now Ida will not receive an e-mail each night notifying her of all of the entries that were added to the folder that day.

3.7 Summary

By following Ida as she gets informed on what's been going on in the Paperless Initiative Articles team, we learned how to find what's new in a folder or workspace, how to track places and people of interest, and how to view recent contributions. We also learned how to effectively use a MiniBlog, as well as how to configure a folder to send e-mail or text message notifications.

Teaming 2.0 provides various ways of navigating the Teaming interface. These navigation methods make it easy to quickly navigate to whatever location or entry that you desire.

- ♦ [Section 4.1, “Using the Workspace Tree Navigation,” on page 21](#)
- ♦ [Section 4.2, “Searching For Information,” on page 21](#)
- ♦ [Section 4.3, “Viewing and Revisiting Recent Places,” on page 22](#)
- ♦ [Section 4.4, “Adding and Viewing Favorites,” on page 22](#)
- ♦ [Section 4.5, “Accessing Recently Viewed Entries,” on page 23](#)
- ♦ [Section 4.6, “Finding People and Places,” on page 23](#)
- ♦ [Section 4.7, “Using Tags,” on page 23](#)
- ♦ [Section 4.8, “Summary,” on page 24](#)

4.1 Using the Workspace Tree Navigation

Julio remembers that one of his long-time colleagues, Eike Hasselbach, is an avid proponent of paperless work environments. Julio decides to use the Workspace Tree Navigation control to navigate to Eike’s personal workspace to see if he has posted any blogs or participated in any discussions dealing with the company’s paperless initiative.

- 1 Julio clicks the plus sign to expand *Personal Workspaces*, then scrolls down and clicks *Eike Hasselbach*.

Teaming navigates to Eike’s personal workspace.

Now Julio can search Eike’s workspace to see if he has made any entries regarding the company’s paperless initiative.

4.2 Searching For Information

- ♦ [Section 4.2.1, “Using Basic Search,” on page 21](#)
- ♦ [Section 4.2.2, “Using Advanced Search,” on page 22](#)

4.2.1 Using Basic Search

After looking in his *Tasks and Calendars* tab, Julio realizes that his manager has assigned a new task to him in Teaming. The task is to identify and then interview an individual within the company who has particular expertise in paperless initiatives. Julio decides to use the Search functionality in Teaming to locate a thought leader in the field.

- 1 Julio types *Paperless* in the *Search* field.
- 2 He clicks the *Search* icon.

Search generates a Search results page that lists items that match his search criteria.

- 3 He can select one of the items in the Search results page, but because he is looking for an expert in the field, he looks in the *Top ranked people* section.
- 4 He clicks the name of the top-ranked person who is not already a member of the team.
After navigating to Jim's personal workspace and reading his areas of expertise, Julio discovers that Jim Taylor once worked at an information management company, and specialized in helping companies cut down on needless paper.

4.2.2 Using Advanced Search

Now that Julio knows that Jim Taylor might be a good resource, he decides to fine-tune his search and see what kinds of entries Jim has recently made in Teaming.

- 1 Julio clicks *Advanced*, located above the *Search* field.
- 2 He selects to search all workspaces and sub-places.
- 3 In the *Text* field, Julio types *paperless*.
- 4 In the *Authors* section, he specifies Jim Taylor in the *Author* field.
- 5 He selects to search for Jim's activity in the last 90 days.
- 6 He wants to search for all entries and comments that Jim has made.
- 7 He clicks *Search*.

In the search results page, Teaming 2.0 displays all of the entries and comments that Jim has posted. Also, in the *Top ranked places* section, Teaming displays the places where these entries and comments appear most often.

4.3 Viewing and Revisiting Recent Places

Julio has been identifying subject matter experts within the company, and has come across a few promising possibilities; however, he's lost track of some of their names. Fortunately, Teaming provides a *Recent Places* section, where he can see the folders and workspaces he has most recently accessed.

- 1 In the Main Sidebar, in the *Recent Places* section, Julio clicks the place he wants to revisit.

4.4 Adding and Viewing Favorites

There are certain pages within Teaming that Julio accesses multiple times a day, such as his team calendars, team task folders, and his manager's blog. To make navigating to these places easier, he adds them to his *Favorites* panel.

- ♦ [Section 4.4.1, "Adding Favorites," on page 22](#)
- ♦ [Section 4.4.2, "Viewing Favorites," on page 23](#)

4.4.1 Adding Favorites

- 1 Julio navigates to the page that he wants to add to his *Favorites* panel.
- 2 He clicks the *Favorites* drop-down list, then clicks *Add this place*.
The page is added to his *Favorites* panel.

4.4.2 Viewing Favorites

- 1 Now, when Julio wants to visit one of these places, he simply clicks the *Favorites* drop-down list from anywhere within Teaming, then selects the page that he wants to view.

4.5 Accessing Recently Viewed Entries

Julio remembers reading an interesting blog that would tie in well to an article he is currently writing, “The Benefits of a Paperless Office.” However, he can’t remember where the blog was.

- 1 To find the article, Julio simply selects the *Recent Entries* tab in his personal workspace. The right column lists all of the entries that Julio most recently visited.

4.6 Finding People and Places

The Find functionality in Teaming makes it easy for Julio to quickly navigate to any folder or workspace within Teaming. For example, Julio wants to visit the personal workspace of a friend from the Human Resources department. She has posted a survey about the paperless initiative and Julio wants to cast his vote.

- 1 Julio starts typing his friend’s name in the *People* field, then clicks the name when it appears.
- 2 From his friend’s personal workspace, he can then find the Survey folder.

Or, if he wants to navigate directly to the folder,

- 1 In the *Places* field, Julio starts typing his friend’s name, then starts typing the name of the folder.

4.7 Using Tags

As Julio researched for the various articles that he’s writing, he came across some interesting information that he would like to keep track of. Tagging functionality in Teaming 2.0 enables Julio to create virtual containers for places and entries. Like folders in his e-mail, he can categorize information, and then come back to it at a later time.

- ♦ [Section 4.7.1, “Tagging Entries,” on page 23](#)
- ♦ [Section 4.7.2, “Tagging Folders,” on page 24](#)
- ♦ [Section 4.7.3, “Searching For Tagged Items,” on page 24](#)

4.7.1 Tagging Entries

Julio comes across an entry that he wants to use in his article, “The Benefits of A Paperless Office.”

- 1 Julio clicks the entry, then he clicks *Tag this*.
- 2 He clicks in the *Personal Tags* field and begins to type *Benefits*.

Because Julio has already created a tag called *Benefits*, when he begins to type the word, the tag appears in the drop-down list.

- 3 He selects *Benefits*, then clicks *Add*.

Julio has now tagged this entry with the *Benefits* tag.

Next, Julio sees an entry that he wants to use in his article, “The Office of the Future.”

- 1 Julio tags the entry with his personal tag, Future.

4.7.2 Tagging Folders

- 1 Julio looks in the *Top ranked places* section, and clicks the Discussion folder.
He discovers that this folder contains entries that would be useful for his article, “Is A Paperless Institution Realistic?”
- 2 In the *Tag This Folder* section, in the *Personal Tags* field, Julio begins typing *Realistic*.
Because Julio has already created a tag called Realistic, when he begins to type the word, the tag appears in the drop-down list.
- 3 He selects *Realistic*, then clicks *Add*.

4.7.3 Searching For Tagged Items

- 1 Now that Julio has tagged some key information for his articles, when he wants to work on his “The Office of the Future” article, Julio types *Future* into the *Tags* field.
Teaming displays all of the items that Julio has tagged with Future.

4.8 Summary

Through observing Julio as he navigates the Teaming interface, we learned how to use the workspace tree navigation, how to search for information, and how to view and revisit recent places. We learned how to add and view favorites, as well as access recently viewed entries. Also, we learned how to find people and places, and how to use tags.

Teaming 2.0 is highly customizable, enabling you to solve specific business problems by allowing you to brand team workspaces, design new entry forms, create workflows, and more.

- ♦ [Section 5.1, “Branding the Team Workspace,” on page 25](#)
- ♦ [Section 5.2, “Team Landing Pages,” on page 25](#)
- ♦ [Section 5.3, “Enabling Folders to Receive Entries Via E-Mail,” on page 25](#)
- ♦ [Section 5.4, “Designing Custom Entry Forms,” on page 26](#)
- ♦ [Section 5.5, “Using Workflows,” on page 26](#)
- ♦ [Section 5.6, “Summary,” on page 27](#)

5.1 Branding the Team Workspace

In order to make his team workspace more unique and identifiable, Julio wants to add a brand to the workspace. He wants to include a graphic of a tree along with the team name, to help remind the team about the positive environmental implications of their work.

- 1 Julio navigates to the Paperless Initiative Articles team workspace.
- 2 He clicks *Manage*, then clicks *Modify this workspace*.
- 3 In the *Branding* section, Julio creates his desired brand.
- 4 He then clicks *OK*.

The workspace now displays the brand that Julio created.

5.2 Team Landing Pages

Julio builds a team landing page to enable team members to see the most important information as soon as they access the team workspace. He decides to display a team calendar, publicity information, and a reminder from their manager.

5.3 Enabling Folders to Receive Entries Via E-Mail

Because Julio gets a lot of good ideas when he’s not at work, he wants to enable the team Discussion folder to receive entries via e-mail. That way, team members can e-mail or text ideas to Teaming no matter where they are.

To do this, he needs to first set up a URL for the Discussion folder in the team workspace.

- 1 Julio navigates to the Discussion folder, then clicks *Manage > Configure*.
- 2 In the *Define a simple URL for this folder or workspace* section, he enters the URL that he wants to use to reference the folder.
- 3 He clicks *Add*.

4 He selects *Allow e-mail posts to this folder via the following addresses*.

5 He clicks *Apply*, then clicks *Close*.

Julio and other members of the team can now make entries to the folder via e-mail.

5.4 Designing Custom Entry Forms

The Editing Requests folder in the Paperless Initiative Articles workspace is where Julio and Anne inform Ida of editing work that they plan to hand off in the near future. Ida has requested that Julio and Anne include the article title, a link to the article in its current state, the date they plan to hand it off, the date they need it back, and the priority. Fortunately, Teaming enables Julio to create a custom entry type and apply it to the Editing Requests folder.

1 When Julio and Anne want to submit an editing request, they simply navigate to the Editing Requests folder and click *Add Editing Request*.

This brings up the custom entry that Julio created. Julio enters all of the required information.

Now, when Ida wants to know what her future workload looks like:

1 She simply clicks the Editing Requests folder, then scans the entries.

5.5 Using Workflows

Workflows have many business applications, and Julio plans to use them to help streamline his team's business practices. A workflow process is an online version of a business process, so instead of slow, time-consuming manual processes, workflows enable team members to focus on their work, and let Teaming 2.0 take care of the rest.

- ♦ [Section 5.5.1, "Life Cycle Workflow," on page 26](#)
- ♦ [Section 5.5.2, "Active/Resolved Workflow," on page 27](#)
- ♦ [Section 5.5.3, "Using Workflows to Solve Corporate Needs," on page 27](#)

5.5.1 Life Cycle Workflow

Julio has created a workflow for the life cycle of an article.

1. After Julio and Anne compose the article in the Wiki folder, they start the workflow by clicking *Workflow > Start Workflow*.

The workflow sends a notification to the editor, stating that an article needs to be edited; the workflow then moves the article into Ida's Editing Queue folder.

2. Ida has now finished editing the article. She transitions the article back to the authors so they can implement her edits. To do this, she clicks *OK*.

The workflow sends a notification to the authors, and then moves the article back into the Article Composition wiki folder.

3. After incorporating Ida's edits into the article, the authors transition the article to their manager, Karl Jones, for approval.

The workflow sends a notification to Karl informing him that the article is now in his Article Approval folder, and is ready for his approval.

4. Karl then transitions the article to the managing editor of the in-house magazine to be published.

The workflow sends a notification to the managing editor, Kaci Quartz, and moves the article into her Editing Queue folder.

The implementation of this workflow saves team members time, and ensures that no steps are accidentally omitted.

5.5.2 Active/Resolved Workflow

The article life cycle is not the only place Julio has implemented workflows for his team. For example, the Article Discussions folder is helping the team answer questions quickly and efficiently, but to make the folder even more useful, Julio has implemented a workflow that enables team members to change the status of discussions from Active, when the discussion is still in an active state, to Resolved, when the issues in the discussion have been resolved. By implementing this workflow, team members are aware of which issues have been resolved, and which issues need further discussion.

5.5.3 Using Workflows to Solve Corporate Needs

Workflows can be created not just to solve team needs, but to solve global corporate needs. Green Energy Power Company uses workflows in their corporate Teaming installation to help minimize work and maximize results.

For example, Julio thinks that it might be beneficial if he and Anne could attend a conference on paperless initiatives, so they can get a better idea of how other companies are accomplishing their paperless initiative tasks. Attending this conference would require approval from their manager, the department manager, and the company travel office. Julio's manager has already created a custom workflow in the team workspace to address these kinds of requests.

- 1 Julio navigates to the folder where the workflow is set up.
- 2 Julio clicks *Add*, and selects the appropriate request type from the drop-down list.
- 3 Julio specifies the appropriate information in the provided fields, then clicks *OK*.

The workflow is now started.

5.6 Summary

Through observing Julio as he customizes the Teaming interface, we learned how to brand a team workspace and enable folders to receive entries via e-mail. Also, we saw that Teaming enables you to build team landing pages, design custom entry forms, and create workflows.

