Advanced User Guide

Novell®
Teaming

2.0

July 31, 2009

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Contents

About This Guide

The Novell® Teaming 2.0 Advanced User Guide explains how to use advanced features of the Teaming product.

This guide includes the following topics:

Audience

This guide is intended for all new Novell 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 Novell Teaming 2.0 Documentation Web site (http://www.novell.com/documentation/teaming2).

Additional Documentation

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

- Novell Teaming Help Mode
- *Novell Teaming Quick Start Guide*
- *Novell Teaming Installation Guide*

- *Novell Teaming Administration Guide*

- *Novell Teaming User Guide*

To access the Novell Teaming Help system, log in to Teaming, then click the *Help* icon (question mark), then click a yellow Help spot for context-sensitive help.

To access the Novell Teaming guides from within Teaming, click the *Help* icon (question mark), then click *Teaming Manuals*.

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.

A trademark symbol ($^{®}$, $^{™}$, etc.) denotes a Novell trademark. An asterisk (*) denotes a third-party trademark.

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.

Are You an Advanced Teaming User? 1

Novell® Teaming is an enterprise collaboration tool designed to increase individual productivity, team effectiveness, and organizational success by providing the right set of tools to the right people. Key teaming features include Team workspaces, calendars, task lists, document management, discussion threads, wikis, blogs, RSS feeds, and workflows.

Teaming enables ordinary users to perform content-management functions. Because all Teaming users need to manage their personal workspace, and also have the ability to create team workspaces, all users have the potential to become "advanced Teaming users."

Although all Teaming users have the ability to become "advanced users," many users never have the need to progress beyond the basic Teaming functionality. This is because Teaming lends itself to two main groups: content consumers and content providers.

- Section 1.1, "Content Consumers," on page 11
- Section 1.2, "Content Providers," on page 11

1.1 Content Consumers

Content consumers use Teaming to get important information that pertains to them. They participate in team workspaces in order to better collaborate with colleagues and facilitate their work assignments. They identify subject-matter experts and search for important information.

Content consumers can learn how to accomplish these and other important tasks in the *Novell Teaming 2.0 User Guide*.

1.2 Content Providers

Content providers use Teaming to manage teams by creating team workspaces and making information easily accessible through landing pages and other advanced Teaming features.

Advanced Teaming users might perform any of the following functions:

- **Create or manage workspaces and folders:** When you create your own workspace or folder, you are the owner of that workspace or folder. (By default, you are also the owner of all sub-workspaces and sub-folders.)

    For example, imagine your manager assigns you to head an advertising campaign for a new product. Because accomplishing this assignment involves the combined efforts of various members of your team, you decide to create a new workspace dedicated to the new campaign.

    For in-depth information, see Chapter 2, "Creating and Managing Workspaces," on page 15 and Chapter 3, "Managing Folders," on page 27.

- **Control user access to workspaces and folders:** As the owner of a workspace or folder, you are responsible for controlling which users have access rights, and deciding which rights are appropriate for which people.

For example, as the advertising campaign manager for a new product, you need to decide if Teaming users who are not members of your team are allowed to create entries in your team workspace, or whether non-team members should even be allowed to view the workspace.

Also, when new users join the team, it is your responsibility to grant them appropriate rights.

For in-depth information, see Chapter 4, "Controlling User Access," on page 37.

 ◆ **Create unique brands for workspaces and folders:** As the owner of a workspace or folder, you are responsible for creating a unique and attractive brand. Creating a unique brand is a good way to differentiate your workspace or folder from other places in the Teaming site.

For example, as the advertising campaign manager for a new product, you brand your team workspace with a graphic of the product logo, along with the new marketing slogan.

For in-depth information, see Chapter 5, "Branding a Folder or Workspace," on page 45.

 ◆ **Create landing pages:** As the owner of a workspace, you can present the most important information on the home page of the workspace. At the same time, you can change the look and feel of the home page. (You cannot create landing pages in personal workspaces.)

For example, as the advertising campaign manager for a new product, you create a landing page in the team workspace. In the landing page you display the current product shipment schedule, the latest news concerning the product, open tasks as they relate to your team members, and so forth.

For in-depth information, see Chapter 6, "Creating and Managing Landing Pages," on page 47.

 ◆ **Create custom workspace and folder views:** As the owner of a workspace or folder, you can create custom views that modify what is displayed on the home page of your workspace or folder. You can display uploaded files, remote applications, pictures, and more.

For example, as the advertising campaign manager for a new product, you can customize the home page of your team workspace to display pictures of the various marketing logo options for the product, as well as uploaded notes from team meetings.

For in-depth information, see Chapter 7, "Creating Custom Workspace Views," on page 57 and Chapter 8, "Creating Custom Folder Views," on page 65.

 ◆ **Create custom folder entry forms:** As the owner of a workspace or folder, you can create custom folder entry forms that users can create when they are making entries in the workspace or folder.

For example, as the advertising campaign manager for a new product, you decide to create a new folder called, "Slogans." Inside this folder, you create a new entry form that enables team members to easily submit their ideas for catchy slogans for the new product. The entry form contains a field for the team member to type his or her name, a field where they can type the slogan, a field where they can upload pertinent pictures, and so on.

For in-depth information, see Chapter 9, "Designing Custom Folder Entry Forms," on page 75.

 ◆ **Create and manage workflows:** As the owner of a workspace or folder, you can create workflows that automate otherwise time-consuming manual processes.

For example, as the advertising campaign manager for a new product, you notice that expense reporting is taking more time than you want. The current process is for members of your team to request an expense reimbursement from you, the manager, then for you to send the request to HR, who then transfers the request to Finance. To automate this process, you implement a workflow that sends you an e-mail notification requesting your approval when the request is submitted. When you give your approval, the workflow is automatically transferred to HR. If HR approves the request, then the workflow is transferred to Finance, where the reimbursement is addressed.

For in-depth information, see Chapter 10, "Creating and Managing Workflows," on page 85.

 • **Manage remote applications:** As the owner of a workspace or folder, you can enable remote applications that have been set up by your Teaming administrator.

For in-depth information, see Chapter 11, "Managing Remote Applications," on page 117.

Creating and Managing Workspaces

<div style="text-align: right; font-size: 3em;">2</div>

2.1 Creating and 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.

2.1.1 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.

Novell® 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.

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 16.

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 "Using the Teaming Clipboard" in the *Novell Teaming 2.0 User Guide*.

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 "Adding Additional Folders to a Workspace" in the *Novell Teaming 2.0 User Guide*.

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 "Using the Teaming Clipboard" in the *Novell Teaming 2.0 User Guide*.

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 "Adding Additional Folders to a Workspace" in the *Novell Teaming 2.0 User Guide*.

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.

2.1.2 Adding Additional Team Members to Your Workspace

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

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 "Using the Teaming Clipboard" in the *Novell Teaming 2.0 User Guide*.

5 Click *OK*.

You can announce the workspace to the new team members. For information on how to do this, see Section 2.1.3, "Sending E-Mail to Team Members and Announcing the Workspace After Its Creation," on page 18.

2.1.3 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 "Filling Out the Send E-Mail Page" in the *Novell Teaming 2.0 User Guide*.

4 Click *OK*.

2.1.4 Starting or Scheduling a Team Meeting

If you have Novell 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 Novell Conferencing, see the *Novell Conferencing User Guide* (http://www.novell.com/documentation/team_plus_conf/conf10_user/data/bookinfo.html).

2.1.5 Viewing Team Members

   ◆ "Viewing Team Members in an Accessory from the Workspace Home Page" on page 18
   ◆ "Viewing Team Members from Any Page within The Workspace" on page 19

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 "Managing Accessories" in the *Novell Teaming 2.0 User Guide*.

By default, Novell 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.

2.1.6 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 Section 4.2, "Managing Access Control for Users and Groups," on page 39.

2.1.7 Using Team Workspaces to Create Hierarchies

Team workspaces in Novell Teaming can be used to organize information inside of existing workspaces, creating different levels of hierarchy within a workspace.

You can also use other types of workspaces to create hierarchies. For information explaining the advantages and disadvantages of using each type of workspace, see Section 2.7, "Creating Workspace Hierarchies," on page 24.

2.2 Creating and Managing a Discussions Workspace

The Discussions workspace can be the home page for a set of discussion forums. You can also use the Discussions workspace to house other types of folders.

Discussions workspaces can be particularly useful for site administrators, or other Teaming users who are responsible for creating the overall structure of the Teaming site. For example, you can use a Discussions workspace to organize a set of company-wide discussions on various topics. This can help organize your Teaming site, so users know where they should go if they are looking for a particular discussion forum.

- Section 2.2.1, "Creating a Discussions Workspace," on page 20
- Section 2.2.2, "Using Discussions Workspaces to Create Hierarchies," on page 20

2.2.1 Creating a Discussions Workspace

1 Navigate to the place in Teaming where you want to create the Discussions workspace.

   Depending on your rights, you might create this workspace at the Global level, if you are creating a company-wide Discussions workspace; or you might create this workspace in a lower-level workspace, if the Discussions workspace is intended for only a smaller number of Teaming users.

2 In the Workspace toolbar, click *Manage > Add New Workspace*.

   The Add New Workspace page is displayed.

3 In the *Workspace Title* field, specify a name for the Discussions workspace.

4 In the *Workspace* section, select *Discussions Workspace*.

5 In the *Workspace Folders* section, select *Discussion*.

   You can add additional Discussion folders after the workspace has been created.

6 Click *OK*.

2.2.2 Using Discussions Workspaces to Create Hierarchies

Discussions workspaces in Novell Teaming can be used to organize information inside of existing workspaces, creating different levels of hierarchy within a workspace.

You can also use other types of workspaces to create hierarchies. For information explaining the advantages and disadvantages of using each type of workspace, see Section 2.7, "Creating Workspace Hierarchies," on page 24.

2.3 Creating and Managing a Basic Workspace

Basic workspaces in Novell Teaming can be used to organize information inside of existing workspaces, creating different levels of hierarchy within a workspace.

You can also use other types of workspaces to create hierarchies. For information explaining the advantages and disadvantages of using each type of workspace, see Section 2.7, "Creating Workspace Hierarchies," on page 24.

To create a basic workspace:

1 Navigate to the place in Teaming where you want to create the basic workspace.

2 In the Workspace toolbar, click *Manage > Add New Workspace*.

The Add New Workspace page is displayed.

3 In the *Workspace Title* field, specify a name for the basic workspace.

4 In the *Workspace* section, select *Workspace*.

5 In the *Workspace Folders* section, select the folders that you want the new workspace to contain.

You can add additional folders after the workspace has been created.

6 Click *OK*.

2.4 Creating and Managing a Project Management Workspace

Project Management workspaces include special accessories that help leaders track the progress of task completion for potentially large projects. Although Project Management workspaces can contain any type of folder, they are specifically designed to work in conjunction with Task and Milestone folders.

- ◆ Section 2.4.1, "Creating a Project Management Workspace," on page 21
- ◆ Section 2.4.2, "Managing a Project Management Workspace," on page 21
- ◆ Section 2.4.3, "Understanding Tasks and Milestones," on page 22

2.4.1 Creating a Project Management Workspace

To create a Project Management Workspace:

1 Navigate to the place in Teaming where you want to create the Project Management Workspace.

2 In the Workspace toolbar, click *Manage > Add New Workspace*.

The Add New Workspace page is displayed.

3 In the *Workspace Title* field, specify a name for the Project Management workspace.

4 In the *Workspace* section, select *Project Management Workspace*.

5 Click *OK*.

2.4.2 Managing a Project Management Workspace

After you create the Project Management workspace, notice that the workspace contains key folders, such as a Task folder, Milestone folder, File folder, and so forth.

The home page of the Project Management workspace provides the following features that enable you to better manage your project:

Task Summary Accessory: This accessory lists all of the tasks that exist in the Task folder of your Project Management workspace.

To modify the information in this accessory, navigate to the Task folder of this Project Management workspace. For information about Task folders, see "Task" in the *Novell Teaming 2.0 User Guide*.

Project Information Box: Displays the Status, Manager, and Due Date of the project.

To modify this information:

1 In the Workspace toolbar, click *Manage > Modify This Folder*.

2 In the Project Information Box section, modify the *Manager*, *Status*, and *Due Date* fields as needed.

3 Click *OK*.

Project Statistics: Displays the current task and milestone statistics that are associated with the project.

2.4.3 Understanding Tasks and Milestones

Because tasks and milestones make up important information in your Project Management workspace, it is important that you understand how they work.

- "Understanding Tasks" on page 22
- "Understanding Milestones" on page 22

Understanding Tasks

For information about Task folders, see "Task" in the *Novell Teaming 2.0 User Guide*.

Understanding Milestones

The Milestones folder contains the various milestones for a project. Each milestone entry has specific task folders that are associated with the milestone. When all of the tasks in the task folders are complete, you can mark the milestone that is associated with those tasks as completed.

- "Creating a Milestone" on page 22
- "Using the Milestone Folder" on page 23
- "Modifying a Milestone" on page 23

Creating a Milestone

1 Navigate to the Milestone folder in your Project Management workspace.

2 In the Folder toolbar, click *Add Milestone*.

The Milestone page is displayed.

3 Specify the following information:

Title: Provide a title for the milestone.

Description: Describe the milestone.

Due Date: Specify when the milestone is due.

Responsible: Specify the users who are responsible for completing the milestone.

Responsible Groups: Specify the groups who are responsible for completing the milestone.

Responsible Teams: Specify the teams who are responsible for completing the milestone.

Send an E-Mail Notification to Responsibles: Send an e-mail notification to users, groups, and teams who are responsible for completing the milestone, notifying them about the new milestone.

Status: Use the drop-down list to specify a status for the milestone (Open, Reopen, Completed).

Task Folders: Use the tree to navigate to and select the task folders that you want to associate with the milestone.

The tasks in these task folders must be completed before the milestone can be marked as Completed.

Attachments: Attach any appropriate files.

Subscribe to This Entry: You can configure Teaming to send you notifications when activity takes place in this entry. For more information, see "Subscribing to a Folder or Entry" in the *Novell Teaming 2.0 User Guide*.

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 "Filling Out the Send E-Mail Page" in the *Novell Teaming 2.0 User Guide*.

Using the Milestone Folder

The Milestone folder contains the following columns that contain information about each milestone:

Name: Displays the name of the milestone.

Responsible: Displays the people who are responsible for the milestone.

Tasks: Displays the task folders that are associated with the milestone.

Mouse over the colors in the bar chart, and Teaming explains the value (needs action, in process, completed).

Status: Displays the status of the milestone.

Due date: Displays the due date of the milestone.

Modifying a Milestone

1 In the Milestone folder, click the milestone name in the *Name* column.

The milestone entry is displayed.

2 In the Entry toolbar, click *Modify*.

The Milestone page is displayed.

3 Make any modifications, then click *OK*.

You might need to refresh the page for your changes to be displayed.

2.5 Creating and Managing a Team Workspace Root Workspace

A Team Workspace Root workspace is designed to contain multiple team workspaces, so use this type of workspace if you want to create additional team workspaces as sub-workspaces to this workspace. When users with appropriate rights view this workspace, they can easily create a new

team workspace by clicking the *Add a Team Workspace* button, as described in "Creating a Highly Visible Team Workspace" on page 16. The *Add a Team Workspace* button is not displayed in regular team workspaces.

You can control who has access to create workspaces in Team Workspace Root workspaces by modifying the access controls, as described in Chapter 4, "Controlling User Access," on page 37.

For more information on organizing team workspaces for a Teaming site, see "Organizing Team Workspaces" in the *Novell Teaming 2.0 Administration GuideNovell Teaming 2.0 Administration Guide*.

To create a Team Workspace Root workspace:

1 Navigate to the location where you want to create the Team Workspace Root workspace.

2 Create a regular team workspace, as described in "Creating a Team Workspace inside of an Existing Team Workspace" on page 16.

3 Navigate to the workspace that you just created in Step 2.

4 In the Workspace toolbar, click *Manage > Configure*.

The Configure Default Settings page is displayed.

5 In the *Default View* section, select *Team Workspace Root*.

6 Click *Apply > Close*.

2.6 Using Global Workspaces

Global workspaces contain information beyond the scope of teamwork that might be of interest broadly across your organization.

Global workspaces can be created only by Teaming administrators. For more information on Global workspaces, see "Establishing Global Workspaces" in the *Novell Teaming 2.0 Administration Guide*.

2.7 Creating Workspace Hierarchies

Teaming provides three types of workspaces that you can use to create hierarchies within existing workspaces. Each type of workspace has its advantages and disadvantages in regards to creating workspace hierarchies, so depending on your objectives and your environment you might want to use either type of workspace.

- Section 2.7.1, "Discussions Workspaces," on page 24
- Section 2.7.2, "Basic Workspaces," on page 25
- Section 2.7.3, "Team Workspaces," on page 25

2.7.1 Discussions Workspaces

If you don't anticipate your workspace having hundreds or thousands of sub-folders, Discussions workspaces are recommended over basic workspace and team workspaces.

The following sections describe the advantages and disadvantages of using a Discussions workspace to create hierarchies within existing workspaces:

Advantages

- ◆ Retains the access control rights of higher-level (parent) workspaces
- ◆ Lists sub-folders and sub-workspaces on the workspace home page (and displays how many items are in each folder)

Disadvantages

- ◆ Does not scale well (if you have hundreds or thousands of sub-folders, you should use a basic workspace to improve performance)

2.7.2 Basic Workspaces

The following sections describe the advantages and disadvantages of using a basic workspace to create hierarchies within existing workspaces:

Advantages

- ◆ Retains the access control rights of higher-level (parent) workspaces
- ◆ Scales well (because basic workspaces do not list sub-folders and sub-workspaces on the workspace home page)

Disadvantages

- ◆ Does not list sub-folders and sub-workspaces on the workspace home page

2.7.3 Team Workspaces

The following sections describe the advantages and disadvantages of using a Team workspace to create hierarchies within existing workspaces:

Advantages

- ◆ Lists sub-folders and sub-workspaces on the workspace home page (and displays how many items are in each folder)

Disadvantages

◆ Does not retain the access control rights of higher-level (parent) workspaces

◆ Does not scale well (if you have hundreds or thousands of sub-folders, you should use a basic workspace to improve performance)

2.8 General Workspace Management

If you have appropriate rights, you can perform various types of management functions on a workspace, such as copying the workspace to another location, moving the workspace, adding folders to the workspace, deleting the workspace, and so forth.

For information on how to perform these and other types of management tasks, see "General Workspace Management" in the *Novell Teaming 2.0 User Guide*.

2.9 Creating Custom Workspace Views

Novell Teaming enables you to create custom workspace views. Workspace views define what is displayed on the main page of your workspace. When you create custom workspace views, you can configure workspaces to display optional features such as remote applications, attachments, and more.

For information on how to create custom workspace views, see Chapter 7, "Creating Custom Workspace Views," on page 57.

Managing Folders

3

3.1 Managing Folder Views

Novell® Teaming enables you to change the way you and other users view your folder. You can change the default view, or allow multiple views.

3.1.1 Changing the Default Folder View

Teaming enables you to change the default view of folders for which you have appropriate rights.

Enabling Views to Be Used as the Default View

Before you can set a view as the default folder view, you need to enable that view.

1 Navigate to the folder where you want to change the default view.

2 In the Folder toolbar, click *Manage > Configure*.

The Configure Default Settings page is launched.

3 In the *Allowed Views* section, select the view whose look best presents your folder list or workspace.

4 Click *Apply*.

The folder view has now been added to the *Default View* section, and can be chosen as the default view, as described in "Selecting a New Default Folder View" on page 27.

Selecting a New Default Folder View

1 In the Configure Default Settings page, in the *Default View* section, select the folder view that you enabled in "Enabling Views to Be Used as the Default View" on page 27.

2 Click *Apply > Close*.

3.1.2 Enabling Alternate Folder Views

Because only folder owners have rights to set the default view of a folder, Teaming enables folder owners to select alternate views that external users of the folder are allowed to use, if they are not satisfied with the default view, or feel more comfortable using another view. For example, you can configure your Calendar folder to allow users to view the folder in the Task folder view, if they so desire.

1 Navigate to the folder where you want to enable alternate views.

2 In the Folder toolbar, click *Manage > Configure*.

   The Configure Default Settings page is displayed.

3 In the *Allowed Views* section, select all of the views that you would like to enable as alternate folder views.

4 Click *Apply > Close*.

To view the folder in an alternate view:

1 In the *Folder Options* section in the main sidebar, click *Folder View*, then select the desired alternate view.

3.2 Working with Folder Entry Types

3.2.1 Enabling Alternate Folder Entry Types

You can select the types of entries that you want to allow users to create in a certain folder. You can configure your folder to allow additional entry types, or you can change the current entry type. If you add additional entry types, users who submit entries into this folder can choose which type of entry they want to add, such as a task entry, calendar entry, and so forth.

1 Navigate to the folder where you want to enable alternate entry types.

2 In the Folder toolbar, click *Manage > Configure*.

   The Configure Default Settings page is displayed.

3 In the *Default Entry Types* section, select the entry types that you want to allow users to create in the folder.

4 Click *Apply > Close*.

If you enable additional entry types, users who submit entries into this folder can click *Add* in the Folder Entry toolbar, then use the drop-down list to choose the type of entry they want to add, depending on which types of entries you enabled on the folder.

Site administrators and folder owners can use the Form and View Designers functionality to create new entry types (custom forms), which then appear in this list. (When folder owners create new entry types, those entry types are listed in the *Local Definitions* section of this list.)

For more information on how to create custom entry types, see Chapter 9, "Designing Custom Folder Entry Forms," on page 75.

3.2.2 Recursively Applying Folder Entry Types

Use this feature to apply entry definition types to folders or entries that have already been created.

This feature must first be enabled by your Teaming administrator. If it is not enabled, it is not visible.

Applying Definition Settings to All Sub-Folders

You can apply all definition settings of a parent folder to all sub-folders.

1 Select *Change contained folders to inherit this folder's definitions*.

2 Click *Apply*.

All definition settings on the Configure Default Settings page are applied to all sub-folders.

Applying Definition Settings to Existing Entries

If you have previously added entries to this folder and the entry definition type does not match that of the other folder entries (for example, you might have a Blog folder that contains primarily Blog definition types, but some of your entries are currently displayed as Discussion definition types), you can use this section to change the definition settings to make all folder entries the same.

1 Select *Change contained folders to inherit this folder's definitions*, then select *Change contained entries to be of the following entry type*.

2 In the drop-down list, select the entry type that you want to apply to all existing entries in the folder.

To add entry types to this drop-down list, select the entry types in the *Default Entry Types* section, then click *Apply*.

3 Click *Apply*.

3.3 Enabling Folders to Receive Entries through E-Mail

Novell Teaming enables you to e-mail entries into folders. This is useful if for some reason you don't have access to the Teaming site and still want to create an entry. You can also send text messages 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 enable folders to receive entries via e-mail, complete the following sections:

3.3.1 Enabling and Configuring the Inbound E-Mail Server During Installation

You need to enable and configure the inbound e-mail server during the Teaming installation.

For information about enabling inbound e-mail during the installation, see "Enabling Inbound E-Mail" in the *Novell Teaming 2.0 Installation Guide*.

3.3.2 Enabling Incoming E-Mail for the Teaming Site

For folders to be able to receive entries via e-mail, Teaming administrators need to enable the Teaming site to allow incoming e-mail.

For information on how to enable Teaming to allow incoming e-mail, see "Disabling/Enabling Inbound E-Mail Postings" in the *Novell Teaming 2.0 Administration Guide*.

3.3.3 Enabling E-Mail Posting with a Simple URL

When you define a simple URL for a folder, Teaming creates a URL that enables you to quickly navigate to the folder, and also creates a corresponding e-mail address that users of the folder can e-mail to.

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 by e-mail or by text-messaging your entry to the e-mail address that you created.

3.3.4 Defining Who Has Access to E-Mail Entries

By default, only users with rights to create entries in a particular folder can e-mail entries into that folder.

Teaming enables you to view who has rights to create entries in a folder, grant rights to other Teaming users, or configure the folder to allow all users to create entries by e-mailing into it.

- "Viewing Who Has Rights" on page 30
- "Granting Rights to Other Teaming Users" on page 31
- "Setting Up a Folder That All Users Can E-Mail Into" on page 31

Viewing Who Has Rights

1 Navigate to the folder where you want to view who currently has rights to create entries in the folder.

2 In the Folder toolbar, click *Who Has Access*.

3 In the provided table, the *Create Entries* section lists all of the users who have rights to create entries in the folder.

These are the users who have rights to e-mail entries into the folder.

Granting Rights to Other Teaming Users

You can grant other Teaming users rights to create entries in a folder.

For information on how to do this, see Section 4.2, "Managing Access Control for Users and Groups," on page 39.

Setting Up a Folder That All Users Can E-Mail Into

You can enable your Teaming folder to receive e-mail entries from all users, regardless of whether they have access to create entries in the folder or not.

This enables e-mail entries to be submitted by anybody, inside or outside of the Teaming system. If you are worried about receiving spam messages in your folder, do not set up your folder to accept e-mail entries in the way described in this section.

1 Navigate to the folder where you want to enable all users to create entries via e-mail.

2 In the Folder toolbar, click *Manage > Access Control*.

3 Ensure that *No* is selected in the Inherit Role Membership section. If it is not, select *No*, then click *Apply*.

4 In the table, click *Add a User*.

5 In the provided field, use the Type-to-Find feature and specify `E-mailing posting agent`.

6 In the *E-mailing posting agent* row, select the check box in the *Participant* column.

7 Click *Save Changes > Close*.

Now all users can create entries in this folder via e-mail, using the e-mail address that you created in Section 3.3.3, "Enabling E-Mail Posting with a Simple URL," on page 30.

3.4 Configuring Folders to Send E-Mail Notifications to Other Users

As a folder owner, you can configure Novell Teaming to send other users e-mail notifications, to inform them of any activity in this folder and any sub-folders of this folder. However, a user's individual settings override or cancel notifications established by folder owners.

You cannot directly configure a sub-folder to send e-mail notifications; instead, you must configure the parent folder.

1 Navigate to the folder from where you want to send the e-mail notifications.

2 In the Folder toolbar, click *Manage > E-Mail Settings*.

The E-Mail Settings page is displayed.

3 In the *Select the Type of E-Mail Notification* section, select the type of e-mail notification that you want to send.

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

- ◆ **Individual Messages (with 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.

4 Specify the users who you want to receive the e-mail notifications.

You can specify specific e-mail addresses, users, groups, or send the notifications to all team members.

5 Click *Apply > Close*.

3.5 Working with Mirrored Folders

A mirrored folder is a library folder within Novell Teaming that is synchronized with a folder located on a system drive outside of Teaming. When you perform basic actions (adding subfolders and files, modifying files, deleting folders and files) by using the Teaming interface or by accessing the file on the drive, the change is reflected in the other interface. The advantage to using mirrored files is that you can apply Teaming tools to files on a drive, including tools such as text search, workflow, and discussion (in the form of comments applied to the entry in the library folder).

For information about setting up mirrored folders in for your Teaming site, see "Configuring Mirrored Folder Resource Drivers" in "Advanced Installation and Reconfiguration" in the *Novell Teaming 2.0 Installation Guide*.

Teaming supports two types of external folders:

- ◆ A directory on a file system
- ◆ A folder on a WebDAV server

When you mirror a folder, the action cannot be undone.

3.5.1 Prerequisites

The following prerequisites apply for setting up mirrored folders.

 * An administrator must have enabled mirrored folder functionality during the Teaming installation process.
 * An administrator must have specified which folders on the server can be mirrored.
 * The file that you mirror must either be located on the Teaming server, or accessible from the Teaming server. (For example, the file can be mapped from the Teaming server.)

3.5.2 Creating a Mirrored Folder

Ensure that you meet the prerequisites discussed in Section 3.5.1, "Prerequisites," on page 33.

1 Navigate to the workspace where you want to set up the Mirrored File folder.

2 Click *Manage > Add New Folder*.

3 Provide a title for the folder in the *Folder Title* field.

4 Select *Mirrored File Folder* in the *Folder* section, then click *OK*.

After you create a Mirrored File folder, you need to configure it. For information on how to do this, see Section 3.5.4, "Configuring a Mirrored Folder," on page 33.

3.5.3 Deleting a Mirrored Folder

1 Navigate to the Mirrored File folder that you want to delete.

2 Click *Manage > Delete This Folder*.

  The Delete This Folder page is displayed.

3 Select *Also delete source contents if this folder or any of the sub-folders are mirrored folders*.

  If you do not select this option, then the folder and its contents are removed from Teaming only, and will be restored in the next synchronization.

4 Click *OK*.

3.5.4 Configuring a Mirrored Folder

After you create a Mirrored File folder, you need to configure it.

1 Select the Mirrored File folder that you created in Section 3.5.2, "Creating a Mirrored Folder," on page 33.

2 In the Folder toolbar, click *Manage > Modify This Folder*.

3 Specify the following information:

  Resource Driver: Use this drop-down list to select the file on the external file system that you want the Mirrored File folder to mirror.

  You can select only files that your Teaming administrator has configured to be used as mirrored files.

  Resource Root Path: This is the file path to the folder that you selected in the Resource Driver field.

Resource Path Relative to the Root Path: If you want to display entries in a lower-level folder than that defined in the Resource Root Path field, use this field to specify the remaining file path.

4 Click *OK*.

3.5.5 Synchronizing a Mirrored Folder

After you have configured your mirrored folder to mirror the appropriate files, as described in Section 3.5.4, "Configuring a Mirrored Folder," on page 33, you need to synchronize the Teaming Mirrored File folder with the external folder that it is mirroring.

Teaming enables you to manually synchronize your mirrored folder, or set up an automated synchronization schedule for it.

- "Manually Synchronizing a Mirrored Folder" on page 34
- "Setting Up a Synchronization Schedule for a Mirrored Folder" on page 34

Manually Synchronizing a Mirrored Folder

1 Navigate to the Mirrored File folder that you want to synchronize.

2 Click *Manage > Manually Synchronize*, in the Folder toolbar.

The Teaming Mirrored File folder is synchronized with the external folder that it is mirroring.

Setting Up a Synchronization Schedule for a Mirrored Folder

1 Navigate to the Mirrored File folder that you want to synchronize.

2 Click *Manage > Schedule Synchronization*.

The Schedule Mirrored Folder Synchronization page is displayed.

3 Specify the following information:

Enable Scheduled Synchronization: Select this check box to enable scheduled synchronization. If you do not select this check box, the scheduled synchronization is not activated.

Every Day: Select this option if you want your mirrored folder to be synchronized every day.

Weekly: Select the days when you want your mirrored folder to be synchronized. (You can select multiple days.)

At Time: Specify the time that you want your mirrored folder to be synchronized.

If you select this option, your mirrored folder is synchronized only one time per day.

Repeat Every: Select the hourly interval when you want your mirrored folder to be synchronized.

4 Click *Apply > Close*.

3.5.6 Mirrored Folder Tips

Consider these tips when working with mirrored files:

- When you specify the path to the system folder, specify the full (absolute) path to the folder.

- After creating the mirrored folder, you cannot alter the pathname, and you cannot reconfigure the Teaming library folder to be a non-mirrored folder.

- To initialize the new mirrored folder, click *Manage > Modify this folder*, and use the Synchronize tool.

- Do not attach additional files to entries in a mirrored folder. Behavior regarding additional attachments is unpredictable.

- When you delete a file on the server, Teaming deletes the entire entry in the library folder (not just the attached file).

- When you add sub-folders to a mirrored folder in Teaming, sub-folders are added to the folder in the other system.

3.6 Viewing Teaming Folders as RSS Feeds

RSS is a Web format used to publish frequently updated content such as blog entries, news headlines, or podcasts. An RSS document, which is often called a feed, contains either a summary of content from an associated Web site or the full text. RSS makes it possible for people to keep up with their favorite Web sites in an automated manner that's easier than checking them manually. RSS enables you to subscribe to various RSS feeds and view those feeds in one convenient location.

You can set up a Novell 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 to stay informed on activity in a certain folder.

To set up a Teaming folder as an RSS feed:

1 Navigate to the folder that you want to set up as an RSS feed.

2 Click the Footer toolbar, located at the bottom of the folder page.

3 In the *RSS URL* section in the provided table, select and copy the RSS URL.

4 In your RSS reader, create a new RSS feed, and paste the RSS URL that you copied in Step 3.

   The folder is now set up as an RSS feed, and entries that are created in the folder appear in your RSS reader.

For information on using your Novell GroupWise® client as an RSS reader, see "RSS Feeds" in the *GroupWise 8 Windows Client User Guide*. Or, see "RSS Feeds" in the *GroupWise 8 Linux/Mac Client User Guide*.

Controlling User Access

<div style="text-align: right; font-size: 3em;">4</div>

If you are a Novell® Teaming site administrator or a workspace and folder owner, it is your responsibility to keep your content safe and your content consumers happy, by making sure they have access to the files and folders they depend on. Access control in Teaming is the method by which you accomplish this.

Workspace and folder owners are responsible for controlling user access in their workspaces or folders. Site administrators are responsible for controlling user access across the entire site.

4.1 Understanding Access Control

Access control is the method by which you specify which users have the right to perform which tasks in which places.

Teaming uses role-based access control. By default, there are six roles, and each role contains specific rights. If you want a particular user to have certain rights, then you can assign that user to the appropriate role.

For example, a user who has been assigned to the Participant role in a workspace or folder can add comments or replies, create entries, delete his or her own entries, modify his or her own entries, and read entries in that folder or workspace.

The following sections help you better understand how access control works in Novell Teaming.

4.1.1 Default Access Control Behavior in Workspaces

By default, places inherit the access settings of their parent. When you establish settings for a primary space, all sub-places automatically apply the same settings, saving administration time.

You can change the access control settings of a lower-level workspace and folder to be different from its parent workspace or folder. For information on how to do this, see Section 4.2, "Managing Access Control for Users and Groups," on page 39.

4.1.2 Default User Rights

By default, all Teaming users have the following rights:

- They can participate in any team workspaces in which they are a member (create folders and entries, make comments, etc.)

- They can create team workspaces (by default, only members of a team can view and participate in team workspaces)
- They can visit all personal workspaces (read entries and comment on them)
- They can participate in all global workspaces and folders

4.1.3 Default Roles

Teaming includes six default roles. Table 4-1 describes the function of each default role, but does not describe all of the rights for each role. For a complete list of rights, click the name of the role in the table on the Configure Access Control page. (In the Folder or Workspace toolbar, click *Manage > Access Control*.)

Teaming also enables site administrators to create their own custom roles, as described in "Defining a New Role" in the *Novell Teaming 2.0 Administration Guide*. If you have a need for a custom role, consult your Teaming administrator.

Table 4-1   *Default Access Control Roles*

Role	Description
Visitor	Has read-only and comment-only access.
Participant	Can create entries and modify those entries, plus perform tasks associated with the Visitor role.
Guest Participant	Can read entries, create entries, and add comments.
Team Member	Has all the rights of a Participant. In addition, can add folders, modify any entry, and has some additional administrator privileges.
Workspace and Folder Administrator	Can create, modify, or delete workspaces or folders; moderate participation (modify or delete the entries of others); design entries and workflows; and can perform tasks associated with the Participant role.
Workspace Creator	Can create sub-workspaces. In Team Workspace Root workspaces, this role allows users to create their own team workspaces.
Site Administrator	Has all rights associated with access control.

4.1.4 Default Users and Groups

As you create users and groups in your Teaming site, you can assign default or custom access control roles to them. In addition to the users and groups that you create, Teaming includes four default users and groups to which you can assign roles. For information on how to do this, see Section 4.2, "Managing Access Control for Users and Groups," on page 39.

Table 4-2 defines the four default users and groups.

Table 4-2 *Default Access Control Users and Groups*

Default User and Group	Description
Owner of a Workspace or Folder	The person who created the workspace, or the person assigned to be the owner of the workspace.
Team Members	The individuals who are designated as team members in a given place, through the *Manage Team* feature in the main sidebar.
All Users	Every person registered within the Teaming site.
Site Administrator	The person who has rights to perform any task in any workspace or folder.

4.2 Managing Access Control for Users and Groups

Novell Teaming provides a table on the Configure Access Control page that enables you to make all of your needed access control modifications. You must use this table to perform any access control modifications in Teaming.

Figure 4-1 *Access Control Table*

- Section 4.2.1, "Accessing the Configure Access Control Page," on page 40

4.2.1 Accessing the Configure Access Control Page

To access this table and the Configure Access Control page:

1 Navigate to the workspace or folder where you want to modify user access rights.

2 Click *Manage > Access Control*, in the Folder or Workspace toolbar.

The Configure Access Control page is displayed.

4.2.2 Activating the Table

Before you can make modifications to the table on the Configure Access Control page, you first need to ensure that the folder or workspace does not inherit its access control settings from its parent folder or workspace:

1 In the section *Folder Inheritance section*, select *no*, then click *Apply*.

This folder inherits its access control settings from its parent.

Inherit role membership from the parent folder or workspace? ⓘ
○ yes   ⦿ no   [Apply]

You can now make modifications to the table.

Figure 4-2 *Access Control Table*

✓ *designates the access control setting of the parent workspace*

Add User Names from Clipboard

			Add a Role ▾		
			Participant	Team Member	Workspace and Folder Administrator
	Owner of Workspace or Folder		✓ ☐	☐	✓ ☑
	Team Members		✓ ☐	✓ ☑	✓ ☑
Add a Group ▾	Group Title	Group Name	Participant	Team Member	Workspace and Folder Administrator
Add a User ▾	User Title	User Id	Participant	Team Member	Workspace and Folder Administrator
	Julio Chavez	julio	☑	☐	☐
Add an Application Group ▾	Application Group Title	Application Group Name	Participant	Team Member	Workspace and Folder Administrator
Add an Application ▾	Application Title	Application Name	Participant	Team Member	Workspace and Folder Administrator

[Save Changes]

{Note: Admin E. Strator (admin) has been designated as the default site administrator with privileges to perform any task on any workspace or folder.}

4.2.3 Adding Roles to the Access Control Table

Click the *Add a role* link at the top of the table, and select the role in the drop-down list that you want to apply to this table. Teaming then adds a new table column for the new role. Remove and add people, groups, and select check boxes as needed.

1 Click the *Add a role* link at the top of the table.

2 From the drop-down list, select the role that you want to add.

Teaming adds a new column for the new role.

3 Assign the appropriate user or group to this role by selecting the check box in the user's or group's row, as described in Section 4.2.6, "Assigning Roles to Users and Groups," on page 43.

For information on how to add a new user to the access control table, see Section 4.2.4, "Adding Users to the Access Control Table," on page 42.

For information on how to add a new group to the access control table, see Section 4.2.5, "Adding Groups to the Access Control Table," on page 42.

4 Click *Save Changes*.

4.2.4 Adding Users to the Access Control Table

You can individually add users to the Access Control table, or you can add them by using the Teaming clipboard.

- ◆ "Adding Individual Users" on page 42
- ◆ "Adding Users from the Clipboard" on page 42

Adding Individual Users

1 Click the *Add a User* link in the left column of the table.

2 In the *Add a User* field, begin typing the name of the user that you want to add, then select that user from the provided list.

Teaming adds a new row to the table for the new user.

3 Assign the user to the appropriate role by selecting the check box in the column of the user's row, as described in Section 4.2.6, "Assigning Roles to Users and Groups," on page 43.

4 Click *Save Changes*.

Adding Users from the Clipboard

1 In the upper left corner of the Access Control table, click *Add User Names from Clipboard*.

All of the users who are currently on your clipboard are added to the Access Control table.

For more information on how to use the Teaming clipboard, see "Using the Teaming Clipboard" in the *Novell Teaming 2.0 User Guide*.

2 Assign the users to the appropriate role by selecting the check box in the column of each user's row, as described in Section 4.2.6, "Assigning Roles to Users and Groups," on page 43.

3 Click *Save Changes*.

4.2.5 Adding Groups to the Access Control Table

1 Click the *Add a Group* link in the left column of the table.

2 In the *Add a Group* field, begin typing the name of the group that you want to add, then select that group from the provided list.

Teaming adds a new row to the table for the new group.

3 Assign the group to the appropriate role by selecting the check box in the column of the group's row, as described in Section 4.2.6, "Assigning Roles to Users and Groups," on page 43.

4 Click *Save Changes*.

4.2.6 Assigning Roles to Users and Groups

A role is a set of privileges; when you assign a user or group to a role, that user or group automatically has all the rights associated with that role.

1 Ensure that the user or group and the role that you want to associate with the user or group are visible in the Access Control table.

For information on how to add a role or a user or group to the table, see Section 4.2.3, "Adding Roles to the Access Control Table," on page 41, Section 4.2.4, "Adding Users to the Access Control Table," on page 42, and Section 4.2.5, "Adding Groups to the Access Control Table," on page 42.

2 In the row of the user or group, select the check box that is located in the role column that you want to assign to the user or group.

3 Click *Save Changes*.

If you want to unassign a role:

1 Simply deselect the appropriate check box, then click *Save Changes*.

4.2.7 Creating Custom Roles

Only Teaming administrators have the ability to create custom roles.

For information on how to create custom roles, see "Defining a New Role" in the *Novell Teaming 2.0 Administration GuideNovell Teaming 2.0 Administration Guide*.

4.2.8 Adjusting Access Controls in Another Place

Teaming enables you to adjust the access control settings of any workspace or folder, directly from the Configure Access Control page.

1 In the workspace tree at the top of the Configure Access Control page, navigate to the place where you want to adjust the access controls.

2 Click the linked title of the place where you want to adjust the access controls.

Teaming displays the Configure Access Control page for the page that you specified.

4.3 Managing Access Control for Remote Applications

Because not all remote applications can be completely trusted, it is often a good idea to limit the privileges of the remote application.

For information on how to do this by using access controls, see Section 11.4, "Managing Access Controls for Remote Applications," on page 121.

Branding a Folder or Workspace

5

Branding a folder or workspace is a good way to make the folder or workspace more unique and identifiable. When you brand a folder or workspace, the brand is applied to all sub-workspaces and sub-folders. However, folder and workspace owners in lower-level folders and workspaces can override the higher-level brand settings by adding a workspace brand of their own. For example, the Global Workspaces folder can be branded with the company logo and slogan, while a team workspace at a lower level in the workspace tree can be branded with a logo for the product that the team is responsible for. Members of that team can then override the team brand by branding individual folders within the team workspace that they are responsible for.

Before you brand your folder or workspace, you might want to view the short tutorial video, Branding a Workspace (http://www.brainstorminc.com/cbt/teaming/ index.php?category=customizations). To display the video, follow this link, then click *Branding a Workspace*.

To brand a folder or workspace:

1 Navigate to the folder or workspace where you want to create the brand.

2 Click *Manage*, then click *Modify This Folder* or *Modify This Workspace*.

3 In the *Branding* section, create your desired brand.

4 Click *OK*.

In the upper left corner of the page, the folder or workspace now displays the brand that you created.

Creating and Managing Landing Pages

6

Enabling a landing page on a workspace or folder enables users of that workspace or folder to quickly see the most important information.

When you display a landing page, you reference content from folder entries within the workspace or folder to display on the landing page.

Figure 6-1 *Landing Page*

Normally you display landing pages at the workspace level, making the workspace home page a quick portal to the most important information contained throughout the workspace. However, Novell® Teaming enables you to display landing pages at the folder level as well as the workspace level.

Before you start creating a landing page, you might want to view the short tutorial video, Creating a Landing Page (http://www.brainstorminc.com/cbt/teaming/index.php?category=customizations). To display the video, follow the link, then click *Creating a Landing Page*.

6.1 Enabling the Landing Page View on a Workspace

Before you can create the landing page, you need to enable the landing page view on the workspace.

By default, Novell Teaming includes a workspace landing page view. Follow the information in this section to enable this landing page view on a workspace.

For information on how to create a custom landing page view for a workspace, see Chapter 7, "Creating Custom Workspace Views," on page 57.

You cannot create a landing page for a personal workspace. However, you can create a landing page for any other type of workspace in Teaming.

1 Navigate to the workspace where you want to create the landing page.

You cannot create a landing page on a personal workspace.

2 Click *Manage > Configure*.

The Configure Default Settings page is displayed

3 In the *Default View* section, select *Landing Page*.

4 Click *Apply > Close*.

5 Continue with Section 6.3, "Setting Up Your Landing Page," on page 49.

6.2 Creating a Landing Page for a Folder

You might want to create a landing page for a folder if your folder contains many sub-folders, is highly visited, and contains a lot of information. Because workspace landing pages are more common than folder landing pages, the process for creating a landing page on the folder is more complex than creating a landing page for a workspace.

You cannot create a landing page for folders within your personal workspace. However, you can create a landing page for folders within any other type of workspace in Novell Teaming.

By default, in order to create a landing page for a folder in Teaming, you need to create a new folder view. (For example, you might name your folder view "Landing Page.") You need to populate this folder view with the Landing Page Layout layout option in the Folder Form, and the Landing Page Layout element in the Folder View. For information on how to create a landing page by creating a new folder view, see Chapter 8, "Creating Custom Folder Views," on page 65.

After you create the new landing page folder view, continue setting up your landing page by following the information in .

6.3 Setting Up Your Landing Page

After you enable a landing page, you need to configure it and set it up to display the desired layout options and folder entries, as described in the following sections.

6.3.1 Choosing Layout Options for Your Landing Page

1 From the landing page, click *Manage > Modify This Workspace*.

2 In the *Landing Page Layout* section, below the workspace *Title* field, you can make the following modifications:

- **Hide the Masthead:** Select this option to hide the masthead (Navigation toolbar). This hides everything above the Workspace toolbar.

- **Hide the Sidebar:** Select this option to hide the main sidebar.

- **Hide the Main Menu Bar:** Select this option to hide the Workspace toolbar to all users who do not have administrative rights on the workspace. Users who do have administrative rights on the workspace see the Workspace toolbar at the bottom of the page when this option is selected.

- **Hide the Footer:** Select this option to hide the Footer toolbar.

- **Show the Branding Area:** Select this option if you have selected to hide the masthead (Navigation toolbar), but you still want to display the branding area.

- **Display Background:** Select whether you want the items on your landing page to display with a dark or a light background.

3 Click *OK* to save the layout changes.

6.3.2 Adding Content to Your Landing Page

1 From the landing page, click *Manage > Modify This Workspace*.

2 In the field above the workspace *Description* section, near the top of the page, click *Add*.
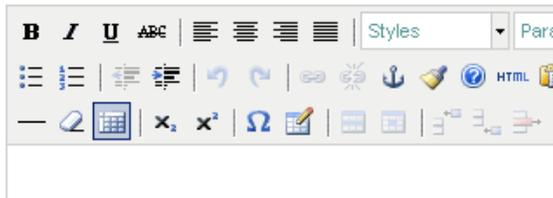
3 Add any of the following items to your landing page:

Adding a Table

When you add a table to your landing page, it enables you to add other content within the individual cells of the table.

1 Click *Add Table*.

2 (Optional) Select *Show Border*, if you want the border of the table to be visible.

3 In the *Number of Columns* field, specify the number of columns that you want the table to have.

4 In the *Widths of Each Column* field, specify the width that you want your columns to have.

IMPORTANT: Enter the column widths in percentages. For example, for a two-column table you might enter `70%,30%`. This means that the first column of the table takes 70 percent of the space, and the second column of the table takes the remaining 30 percent. If you don't use the % sign, the numbers you enter are interpreted as pixels, and the outcome is not desirable.

---

5 Click *OK*.

You can now add content to the individual cells of the table.

1 In the cell where you want to add the content, click *Add*, then choose the type of content that you want to add.

Adding a List

1 Click *Add List*.

2 In the *List Title* field, specify the title that you want the list to have.

3 Select *Show Border* if you want the border of the list to be visible.

4 Click *OK*.

You can now add items to the list:

1 Inside the list that you just created, click *Add*, then choose the type of content that you want to add.

Adding an Entry

The actual content of your landing page is created in entries. The landing page simply references entries that have already been created within the workspace.

To add an entry to the landing page:

1 Click *Add Entry*.

2 In the provided field, specify the entry that you want to display on the landing page.

3 Select *Show the Title Bar* if you want the title bar of the entry to be visible.

4 Click *OK*.

Adding a Folder

1 Click *Add Folder*.

2 In the *Find a Folder to be Added* field, specify the folder that you want to display on the landing page.

3 Select *Show the Title Bar* if you want the title bar to be displayed.

4 Select *Show the Folder Description* if you want the folder description to be displayed.

5 Select *Show Entries Opened* if you want opened entries to be displayed.

6 In the *Number of Entries to be Shown* field, specify the number of entries that you want to be displayed at any one time.

7 Click *OK*.

Adding a Link or URL

1 Click *Add a Link (or URL)*.

2 In the *Link Title* field, specify the title that you want to be displayed on the landing page.

3 In the *Link URL* field, specify the URL that you want to link to.

You can paste a Teaming permalink into this field to link to a page within Teaming. To get the permalink URL of a Teaming page, simply navigate to the page that you want to link to, click *Permalink* in the footer toolbar, then copy the permalink URL from the *Permalink* field.

4 Click *OK*.

Adding a Graphic

1 Click *Add Graphic*.

2 Select *Show Border* if you want the border of the graphic to be visible.

3 In the *Graphic* drop-down list, select the graphic that you want to display.

all attachments that are attached to the landing page are displayed in this list.

4 Click *OK*.

Adding a Utility Element

Most of the utility elements are options that are normally displayed either in the Teaming masthead or main sidebar; however, because it is often desirable to disable the masthead and sidebar in order to make more room for information on your landing page, utility elements enable you to display important features in a more concise view.

1 Click *Add Utility Element*.

2 From the *Add Utility Element* drop-down list, select from the following utility elements:

Video Tutorials: Displays the *Video Tutorials* banner. This banner contains various Teaming tutorial videos. These videos can be a useful tool for training new Teaming users.

Sign-in Form: Displays a Sign In form when users are not logged in to Teaming.

Link to "Teaming Administration Page": Provides a link to the Teaming Administration page.

This link is visible only to Teaming users who have administrative rights.

Link to "My Workspace": Displays a link to your personal workspace.

This can be useful if you have disabled the Teaming masthead that displays the *My Workspace* link. When you add this utility element, it enables users to quickly return to their personal workspaces, even if the Teaming masthead is disabled.

Link to "Track this Folder or Workspace": Displays a *Track This Workspace* or *Track This Folder* link.

This is useful if you have disabled the main sidebar where the *Track This Workspace* and *Track This Folder* option normally resides. When you add this utility element, it enables users who want to track the workspace or folder to do so, even if the main sidebar is disabled.

Link to "Share this Folder or Workspace": Displays a *Share This Workspace* or *Share This Folder* link.

This is useful if you have disabled the main sidebar where the *Share This Workspace* or *Share This Folder* option normally resides. When you add this utility element, it enables users who want to share the workspace or folder to do so, even if the main sidebar is disabled.

3 Click *OK*.

Adding a Custom JSP

Custom JSP* files are stored in the `WEB-INF\jsp\custom_jsps` directory. If you want to include a custom JSP file in your landing page, you must store the file in this directory in order to reference it from Teaming.

Typically, only Teaming administrators have access to this directory. If you want to create a custom JSP file, consult your Teaming administrator.

1 After you have created your custom `JSP` file in the `WEB-INF\jsp\custom_jsps` directory, click *Add Custom JSP*.

2 In the *Custom JSP Name* field, type the name of the custom JSP.

3 Click *OK*.

6.4 Easily Updating Your Landing Page

You do not need to manually modify your landing page every time you want to replace an entry. Because it can be tedious to delete an entry and then add another one from the Add/Delete form in the Modify This Workspace page, Novell Teaming enables you to leverage the power of workflows to help keep your landing page up-to-date, with minimal manual effort.

For example, suppose that you are the manager of a particular product, and you want to use your team landing page to display the product's earnings for the most recent quarter. You could reference a particular entry in the Quarterly Earnings folder, where all of the quarterly earnings for the product are stored; however, this would mean that at the end of each quarter you would need to manually delete the old entry from your landing page, and then add the new entry for the new quarter. Teaming provides an easier way: simply reference the Quarterly Earning folder from your landing page, and at the end of each quarter start the Publish workflow on the entry that contains the earning for that quarter. This displays on the team landing page the entry that contains the updated quarterly earnings.

- Section 6.4.1, "Point to the Folder Where the Entry Resides," on page 53
- Section 6.4.2, "Use the Publish Workflow to Publish Entries to Your Landing Page," on page 53

6.4.1 Point to the Folder Where the Entry Resides

When you are adding content to your landing page (as described in Section 6.3.2, "Adding Content to Your Landing Page," on page 49), if you display an entry that you might want to replace in the future, reference the folder where the entry resides instead of referencing the entry directly.

1 Navigate to your landing page.

2 In the Workspace toolbar, click *Manage > Modify This Workspace*.

3 In the field above the workspace *Description* section, near the top of the page, click *Add*.

4 Click *Add Folder*.

5 Specify the folder where the entry that you want to display resides.

6 In the *Number of Entries to be Shown* field, specify `1`.

6.4.2 Use the Publish Workflow to Publish Entries to Your Landing Page

By default, Teaming includes a workflow called Publish. This workflow can help you more easily manage what is displayed on your landing page.

If you are referencing a folder from your landing page (as described in Section 6.4.1, "Point to the Folder Where the Entry Resides," on page 53), and you have configured the landing page to display just one entry from the folder, you can use the Publish workflow to decide which entry you want to display on your landing page.

The most recent entry that you publish is the entry that is displayed on the landing page (published to the landing page).

 ◆ "Enabling the Publish Workflow on Your Folder" on page 54
 ◆ "Publishing a New Entry to Your Landing Page" on page 54

Enabling the Publish Workflow on Your Folder

1 Navigate to the folder where you want to enable the Publish workflow.

2 Click *Manage > Configure*.

The Configure Default Settings page is displayed.

3 In the *Allowed Workflows* section, select *Publish Workflow*.

4 Click *Apply > Close*.

Publishing a New Entry to Your Landing Page

1 Open the entry that you want to display on your landing page.

2 In the Entry toolbar, click *Workflow > Start Workflow: Publish Workflow*.

The entry where you most recently started the Publish workflow is now displayed on your landing page, replacing the entry that was previously displayed.

6.5 Adding Accessories to Your Landing Page

You can add accessories to a landing page by modifying the design of the standard landing page, or by creating a new landing page design.

 ◆ Section 6.5.1, "Modifying the Design of the Standard Landing Page," on page 54
 ◆ Section 6.5.2, "Creating a New Landing Page Design," on page 55

6.5.1 Modifying the Design of the Standard Landing Page

You can modify the design of the standard landing page only if you are the Teaming administrator, or if you have administrative rights.

1 In the Folder or Workspace toolbar, click *Manage > Site Administration*.

The site administration page is launched.

2 Click *Form and View Designers*.

The Form and View Designers page is launched.

3 Expand *Workspace view*, then click *Landing Page*.

4 Click *Workspace view > Add*.

5 In the *Standard Form Elements* section, click *Accessory Panel*, then click *OK*.

The Accessory Panel has now been added to the standard Landing Page view. Now users can add accessories to their landing page by default.

6.5.2 Creating a New Landing Page Design

You can create your own Landing Page view, then add the Accessory Panel element to the view.

To accomplish this, complete the following sections:

Creating the New Landing Page Definition

1 Navigate to the workspace where you want to create the new Landing Page view.

2 In the Workspace toolbar, click *Manage > Form and View Designers*.

The Form and View Designers page is displayed.

3 Click *New > Workspace views*.

4 Specify the following information:

Caption: Specify a name for the new landing page.

This is the name that appears in the Teaming interface that users see when they use this workspace. (For example, `Custom Landing Page.`)

Name: Specify the internal name for the landing page.

The name that you enter in this field is not visible to users who use this workspace. (For example, "custom_landing_page.")

Family: Select the workspace type that this view is most closely associated with.

Workspace Icons: Select the workspace icon that you want to represent the landing page.

5 Click *OK*.

The Designer page is launched.

6 Continue with "Adding the Landing Page Layout Option" on page 55.

Adding the Landing Page Layout Option

1 In the Designer page, click *Workspace Add/Modify Form > Add*.

2 In the *Layout Options* section, click *Landing Page Layout*.

3 Specify the following information:

Caption: Specify a name for the Landing Page Layout, or keep the default.

Name: Specify the internal name for the Landing Page Layout.

4 Click *OK*.

5 Click *Workspace view > Add*.

6 In the *Standard Form Elements* section, click *Landing Page Layout*.

7 For the *Caption* and *Data item name* fields, retain the same information that you specified in Step 3.

8 Click *OK > Close > Close*.

9 Continue with "Enabling the New Landing Page" on page 56.

Enabling the New Landing Page

After you have created the new landing page view, you need to enable it on the workspace.

1 From the workspace where you want to enable the landing page, click *Manage > Configure*.

The Configure Default Settings page is displayed.

2 In the *Default View* section, go to the *Local Definitions* subsection and select the landing page that you created,

3 Click *Apply > Close*.

The landing page is now displayed when you access the workspace.

4 Continue with "Modifying the Landing Page After You Have Created It" on page 56.

Modifying the Landing Page After You Have Created It

Now that you have created and enabled the new landing page, you can hide the main sidebar and Workspace toolbar. This gives your landing page a more traditional landing page feel.

When you hide the Workspace toolbar, it appears at the bottom of the landing page for those users who have rights to manage the workspace.

1 From the landing page, click *Manage > Modify This Workspace*.

2 In the *Landing Page Layout* section, below the workspace *Title* field, select *Hide the Sidebar* and *Hide the Main Menu Bar*.

For information regarding the other options in this section, see Section 6.3.1, "Choosing Layout Options for Your Landing Page," on page 49.

Creating Custom Workspace Views

7

Novell® Teaming enables you to create custom workspace views. Workspace views define what is displayed on the home page of your workspace. When you create custom workspace views, you can configure workspaces to display optional features such as remote applications, attachments, and more. You can even create a custom workspace landing page.

To create a custom workspace view, you must complete the following sections:

7.1 Creating a New Custom Workspace View

1 Navigate to the workspace where you want to create the new view.

2 Click *Manage > Form and View Designers* in the Workspace toolbar.

The Form and View Designers page is launched.

3 Click *New > Workspace Views*.

The Add a New Definition form is displayed.

4 Specify the following information in the Add a New Definition form:

Caption: This is where you specify the name of the workspace view that you want to appear in the Teaming interface. (For example, "Custom Workspace.")

Name: This is where you specify the internal name of the workspace view. This name is not visible to regular Teaming users. (For example, "custom_workspace.")

Family: Select the workspace type that this view is most closely associated with.

Workspace Icons: Select the icon that you want to represent the workspace. The icon that you select is displayed with the name of the workspace in the main sidebar.

5 Click *OK*.

6 To complete the creation process, continue with Section 7.2, "Designing a Custom Workspace View," on page 58.

7.2 Designing a Custom Workspace View

The steps in this section describe how to customize (design) a workspace view after it has already been created. For information on how to create a custom workspace view, see Section 2.9, "Creating Custom Workspace Views," on page 26.

You can design a workspace view immediately after you create it, or you can modify the design of an existing workspace view. For information on how to modify an existing workspace view, see Section 7.3, "Modifying an Existing Workspace View," on page 61.

Teaming enables you to design the workspace form and the workspace view. You must design both the form and view of a workspace in order for the elements to be displayed in the workspace view.

  ◆ Section 7.2.1, "Designing the Workspace Add/Modify Form," on page 58
  ◆ Section 7.2.2, "Designing the Workspace View," on page 60

7.2.1 Designing the Workspace Add/Modify Form

The workspace add/modify form is the form you see when you are modifying the content of your workspace home page. This form needs to contain all of the elements and layout options that you want to display in your workspace home page. For example, you might want to display multiple remote applications and a two-column table.

Teaming provides you with all of the tools necessary to create a custom workspace form that suits your needs.

After you add elements and layout options to the workspace form, you must then add those same elements and layout options to the workspace view in order for them to be displayed in your workspace. For information on how to add features to the workspace view, see "Designing the Workspace View" on page 60.

1 Under the custom workspace form that you created, expand *Workspace Add/Modify Form*.

All of the elements and layout options that are currently applied to your form are displayed.

Form and View Designers

Paperless Initiative Article
Designer >> Custom Workspace (custom_workspace)

```
Custom Workspace (custom_workspace)
   Workspace Add/Modify Form
      Title - Title
      Description - Description
      Branding - Branding
      Icon - Icon
      Attachment(s) - Attachment(s)
   Workspace view
```
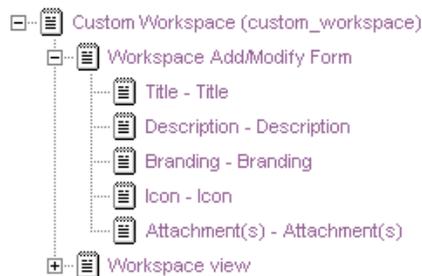
2 Add and modify the desired elements and layout options, as described in the following sections:

- "Adding Additional Elements to a Form" on page 59
- "Modifying Elements in a Form" on page 59
- "Adding Additional Layout Options to a Form" on page 59

Adding Additional Elements to a Form

1 Click *Workspace Add/Modify Form*.

2 In the Workspace Add/Modify Form window, on the right side of the page, click *Add*.

3 In the *Standard Form Elements* section, click the element that you want to add.

For information on the types of elements that you can add, see Section 7.6.1, "Workspace Form Elements," on page 62.

4 Specify the appropriate information.

5 Click *OK*.

Modifying Elements in a Form

1 Expand *Form*, then click the element that you want to modify.

2 In the window on the right side of the page, click *Modify*.

3 Make the desired modifications, such as changing the caption or data name, then click *OK*.

Based on the modifications that you make to a form element, you might need to make the same modifications to the corresponding view element.

Adding Additional Layout Options to a Form

1 Click *Workspace Add/Modify Form*.

2 In the Workspace Add/Modify Form window, on the right side of the page, click *Add*.

3 In the *Layout Options* section, click the layout option that you want to add.

For information on the types of layout options that you can add, see Section 7.7, "Understanding Layout Options," on page 64.

4 Specify the appropriate information.

5 Click *OK*.

7.2.2 Designing the Workspace View

The workspace view is how the information from your workspace add/modify form is displayed to users who view your workspace. Every form must have a corresponding view. This view needs to contain all of the elements and layout options that you want to display in your workspace home page; it is made up of elements from the form.

Teaming provides you with all of the tools necessary to create a workspace view that suits any of the purposes that you want to accomplish with your workspace.

Before you can add elements and layout options to the workspace view, you must first add those same elements and layout options to the workspace form in order for them to be displayed in your workspace. For information on how to add features to the workspace form, see "Designing the Workspace Add/Modify Form" on page 58.

1 Under the custom entry form that you created, expand *Workspace view*.

All of the elements and layout options that are currently applied to your view are displayed.

2 Add the desired elements and layout options, as described in the following sections:

◆ "Adding Additional Elements to a View" on page 60

◆ "Adding Additional Layout Options to a View" on page 61

Adding Additional Elements to a View

1 Click *Workspace view*.

2 In the Workspace view window, on the right side of the page, click *Add*.

3 In the *Standard Form Elements* section click the element that you want to add.

When you add elements to a view, you add elements that have already been added to the form; any form element that you create can be added as a view element.

For information on the types of elements that you can add that are specific to Views, see Section 7.6.1, "Workspace Form Elements," on page 62.

4 Specify the appropriate information.

5 Click *OK*.

Adding Additional Layout Options to a View

1 Click *Workspace view*.

2 In the Workspace view window, on the right side of the page, click *Add*.

3 In the *Layout Options* section, click the layout option that you want to add.

For information on the types of layout options that you can add, see Section 7.7, "Understanding Layout Options," on page 64.

4 Specify the appropriate information.

5 Click *OK*.

7.3 Modifying an Existing Workspace View

1 In the folder or workspace where the custom workspace view was created, click *Manage > Form and View Designers*.

The Form and View Designers page is launched.

2 Expand *Workspace view*, then click the custom workspace view that you want to modify.

3 Continue with Section 7.2, "Designing a Custom Workspace View," on page 58.

7.4 Enabling the Workspace View

After you have defined and designed the workspace view, you need to enable it as the default view for the workspace.

1 Navigate to the workspace where you want to enable your custom view as the default view.

2 In the Workspace toolbar, click *Manage > Configure*.

The Configure Default Settings page is displayed.

3 In the *Default View* section, select the custom view that you created.

4 Click *Apply > Close*.

7.5 Populating Elements in the Workspace View

After you define and design a workspace view, you need to populate and customize some of the elements that you included in the view.

For example, if you added a Branding element, you need to create your brand to display in the workspace; if you added a Description element, you need to populate the element with a description of the workspace; if you added an Attachment element, you need to attach any files that you want to display in the workspace, and so forth.

1 After the workspace view has been defined, designed, and enabled as the default workspace view, as described in , navigate to the workspace.

2 In the Workspace toolbar, click *Manage > Modify This Workspace*.

A page with all of the form elements that you added to the workspace view add/modify form is displayed. (If you want these elements to be displayed in the workspace, ensure that you have also added them to the view form of the workspace view.)

3 Populate the elements with the desired information.

For example, create your workspace brand, add a workspace description, attach any files, and so forth.

4 Click *OK*.

7.6 Understanding Elements

Elements make up the content of your workspace forms and views.

When you are adding elements to a form, remember that you need to add that same element to the view in order for it to be displayed in the workspace.

You can add the following elements:

-
-

7.6.1 Workspace Form Elements

Attachment(s): Provides a field that enables you to browse for and upload files, making them accessible to those who view the workspace.

The files that you upload are displayed in the workspace home page.

Branding: Provides an HTML text editor that enables you to create a brand for the workspace.

This brand is displayed in the upper left corner of the workspace.

Description: Provides an HTML text editor that enables you to specify a description of the workspace.

File Upload: Provides a field that enables users to browse for and upload files.

HTML Editor Text Area: Provides an HTML text editor where you can compose messages, create links, upload pictures, and more. The information that you create in this HTML editor is displayed in your folder.

Icon: Enables the workspace owner to choose from a selection of icons which icon to represent the workspace with.

Picture: Provides a field that enables you to browse for and upload pictures.

Remote Application: Enables you to choose a remote application to display.

Remote applications must be created and enabled for use by the Teaming administrator.

Title: Provides a field that enables you to specify a title for the workspace.

7.6.2 Workspace View Elements

Any form element that you create can be added as a view element, if you want it to show up in the view.

The following elements are specific to views; they cannot be added to a form.

Accessory Panel: Displays the Accessory Panel on the workspace home page. Users can use this panel to add community or personal accessories, depending on their individual rights.

For more information on accessories, see "Managing Accessories" in the *Novell Teaming 2.0 User Guide*.

Entry Creation Date: Displays the date that the entry was created.

Entry Creator: Displays who created the entry.

Entry Creator and Creation Date: Displays who created the entry and when they created it.

Landing Page Layout: Adds a landing page creation form that enables you to create landing page elements to display in your workspace.

You must add the Landing Page Layout layout option in the workspace add/modify form before you can add it as a view element.

Workspace and Folder List: Displays a workspace tree that contains the workspace and all sub-workspaces and sub-folders.

Title: Displays on the workspace home page the title that you specified for the workspace.

This is useful if you have disabled the main sidebar where the workspace tree normally resides.

7.7 Understanding Layout Options

Layout options can enhance the presentation of your workspace forms and views.

When you are adding layout options to a form, remember that you need to add that same layout options to the view in order for it to be displayed in the workspace.

You can add the following form layout options:

Box: Places a box around the specified elements.

Custom JSP: Enables you to reference a custom JSP from the Teaming directory.

Custom JSPs must be created by Teaming administrators.

Divider: Displays a horizontal line between elements.

Expandable Area: Displays an expandable tree element.

Fieldset: Provides a box that you can place other elements inside of.

Use this option if your form is exceptionally long.

HTML: Adds HTML formatting.

Landing Page Layout: (For the View Definition, the Landing Page Layout is in the *Elements* section) Adds a landing page creation form that enables you to create landing page elements that you can populate when you modify your workspace.

Three Column Table: Enables you to add elements within a three-column table.

Two Column Table: Enables you to add elements within a two-column table.

Creating Custom Folder Views

8

Novell® Teaming enables you to design custom folder views. Folder views define what is displayed on the home page of your folder. When you design custom folder views, you can configure folders to display optional features such as remote applications, attachments, and more. You can even create a folder landing page.

To create a custom folder view, you must complete the following sections:

8.1 Creating a New Custom Folder View

1 Navigate to the folder or workspace where you want to create the new view.

If you create a new folder view at the workspace level, the folder view can be enabled on any folder within the workspace. If you create the folder view at the folder level, the folder view can be enabled only on that folder where the view was created.

2 Click *Manage > Form and View Designers* in the Folder toolbar.

The Form and View Designers page is launched.

3 Click *New > Folder Views*.

The Add a New Definition form is displayed.

4 Specify the following information in the Add a New Definition form:

Caption: This is where you specify the name of the folder view that you want to appear in the Teaming interface. (For example, "Custom Blog.")

Name: This is where you specify the internal name of the folder view. This name is not visible to regular Teaming users. (For example, "custom_blog.")

Family: Select the folder type that this view is most closely associated with.

Folder Icons: Select the icon that you want to represent the folder. The icon that you select is displayed with the name of the folder in the main sidebar.

5 Click *OK*.

6 To complete the creation process, continue with Section 8.2, "Designing a Custom Folder View," on page 66.

8.2 Designing a Custom Folder View

The steps in this section describe how to customize (design) a folder view after it has already been created. For information on how to create a folder view, see Section 8.1, "Creating a New Custom Folder View," on page 65.

You can design a folder view immediately after you define it, or you can modify the design of an existing folder view. For information on how to modify an existing folder view, see Section 8.3, "Modifying an Existing Folder View," on page 69.

Teaming enables you to design the workspace form and the workspace view. You must design both the folder form, and the folder view in order for your changes to be displayed in the folder.

- Section 8.2.1, "Designing the Folder Form," on page 66
- Section 8.2.2, "Designing the Folder View," on page 67

8.2.1 Designing the Folder Form

The *Folder Form* section in the Form and View Designers tool enables you choose the features you want to include in your folder.

After you add elements and layout options to the folder form, you must then add those same elements and layout options to the folder view in order for them to be displayed in your folder. For information on how to add features to the folder view, see "Adding Additional Elements to an Entry View Definition" on page 79.

Teaming provides you with all of the tools necessary to create a folder form that will suit any of the purposes that you want to accomplish with your folder.

1 Expand the custom folder form that you previously defined.
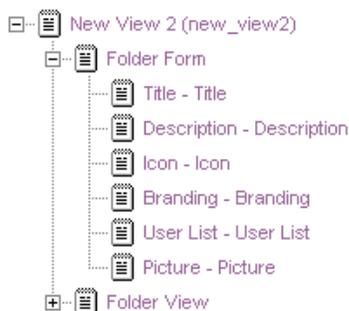
2 Add the desired elements and layout options, as described in the following sections:

- "Adding Additional Elements to a Folder Form" on page 67

Adding Additional Elements to a Folder Form

1 Click *Folder Form*.

2 In the Folder Form window, on the right side of the page, click *Add*.

3 In the *Standard Form Elements* section, click the element that you want to add.

For information on the types of elements that you can add, see Section 8.6.1, "Folder Form Elements," on page 71.

4 Specify the appropriate information.

5 Click *OK*.

Modifying Elements in a Folder Form

1 Expand *Form*, then click the element that you want to modify.

2 In the window on the right side of the page, click *Modify*.

3 Make the desired modifications, such as changing the caption or data name, then click *OK*.

Based on the modifications that you make to a form element, you might need to make the same modifications to the corresponding view element.

Adding Additional Layout Options to a Form

1 Click *Folder Form*.

2 In the Folder Form window, on the right side of the page, click *Add*.

3 In the *Layout Options* section, click the layout option that you want to add.

For information on the types of layout options that you can add, see Section 8.7, "Understanding Layout Options," on page 72.

4 Specify the appropriate information.

5 Click *OK*.

8.2.2 Designing the Folder View

The folder view is how your folder form is displayed to other users. Every folder form must have a view associated with it. This view needs to contain all of the elements that you want to display in your folder.

Teaming provides you with all of the tools necessary to create a folder view that suits any of the purposes that you want to accomplish with your folder.

1 Expand the custom folder view that you previously defined.

2 Add the desired elements and layout options, as described in the following sections:

- "Adding Additional Elements to a Folder View" on page 68
- "Adding Additional Layout Options to a Folder View" on page 68

Adding Additional Elements to a Folder View

1 Click *Folder View*.

2 In the Folder View Definition window, on the right side of the page, click *Add*.

3 In the *Standard Form Elements* section click the element that you want to add.

For information on the types of elements that you can add, see Section 8.6.2, "Folder View Elements," on page 71.

Before you can add some of these elements to your Folder View, you must first add them to the Folder Form. For information on how to do this, see "Adding Additional Elements to a Form" on page 78.

4 Specify the appropriate information.

5 Click *OK*.

Adding Additional Layout Options to a Folder View

1 Click *Folder View*.

2 In the Folder View window, on the right side of the page, click *Add*.

3 In the *Layout Options* section, click the layout option that you want to add.

For information on the types of layout options that you can add, see Section 8.7, "Understanding Layout Options," on page 72.

4 Specify the appropriate information.

5 Click *OK*.

8.3 Modifying an Existing Folder View

1 In the folder or workspace where the custom folder view was previously defined, click *Manage > Form and View Designers*.

The Form and View Designers page is launched.

2 Expand *Folder Views*, then click the custom folder view that you want to modify.

3 Continue with .

8.4 Enabling the Folder View

After you have defined and designed the folder view, you need to enable it to be viewed by those that will use the folder.

You can enable the folder view to be the default folder view for a folder, or to be an alternate folder view.

8.4.1 Setting the Custom Folder View to Be the Default Folder View

Enabling Views to Be Used As the Default View

Before you can set a view as the default folder view, you need to enable that view.

1 Navigate to the folder where you want to change the default view to the custom view that you created.

2 In the Folder toolbar, click *Manage > Configure*.

The Configure Default Settings page is displayed.

3 In the *Allowed Views* section, select the custom view that you created.

4 Click *Apply*.

The custom folder view has now been added to the *Default View* section, and can be chosen as the default view, as described in "Changing the Default Folder View After the Desired View Has Been Enabled" on page 70.

Changing the Default Folder View After the Desired View Has Been Enabled

1 In the Configure Default Settings page, in the *Default View* section, select the custom folder view that you previously enabled in "Enabling Views to Be Used As the Default View" on page 69.

2 Click *Apply > Close*.

8.4.2 Setting the Custom Folder View to Be an Alternate Folder View

Teaming enables you to set the custom folder view to be an alternate folder view. This lets users decide whether they want to see the custom folder view that you created instead of the default folder view.

1 Navigate to the folder where you want to set the custom folder view as an alternate view.

2 In the Folder toolbar, click *Manage > Configure*.

The Configure Default Settings page is displayed.

3 In the *Allowed Views* section, select the custom folder view that you created.

4 Click *Apply > Close*.

Now, users who want to view the folder in the alternate view can click *Folder View* in the *Folder Options* section in the main sidebar, then select the custom folder view.

8.5 Populating Elements in the Folder View

After you define and design a folder view, you need to populate and customize some of the elements that you included in the view.

For example, if you added a Branding element, you need to create your brand to display in the folder; if you added a Description element, you need to populate the element with a description of the folder; if you added an Attachment element, you need to attach any files that you want to display in the folder, and so forth.

1 After the folder view has been defined, designed, and enabled as the default folder view, as described in Section 8.4.1, "Setting the Custom Folder View to Be the Default Folder View," on page 69, navigate to the folder.

2 In the Folder toolbar, click *Manage > Modify This Folder*.

A page with all of form elements that you added to the folder form is displayed. (If you want these elements to be displayed in the folder, ensure that you have also added them to the folder view.)

3 Populate the elements with the with the desired information.

For example, create your folder brand, add a folder description, attach any files, and so forth.

4 Click *OK*.

8.6 Understanding Elements

Elements make up the content of your forms and views. Some elements can be used only once.

When you are adding elements, remember that when you add an element to a form, you need to add that same element to the view in order for it to be displayed in the folder.

You can add the following elements:

- Section 8.6.1, "Folder Form Elements," on page 71
- Section 8.6.2, "Folder View Elements," on page 71

8.6.1 Folder Form Elements

Attachments: Enables you to display uploaded files as an attachment.

Attachments include a thumbnail, and details about the document, such as file size and author.

Branding: Enables you to brand your folder.

Description: Provides an HTML text editor that enables you to provide a description of the folder.

File Upload: Enables you to upload files.

HTML Editor Text Area: Provides an HTML text editor where you can compose messages, create links, upload pictures, and more. The information that you create in this HTML editor is displayed in your folder.

Icon: Enables you to change the folder icon that is displayed in the main sidebar.

Picture: Provides a field that enables you to upload a picture to display in your folder.

Remote Application: Enables you to display certain applications that have been configured by your Teaming administrator.

For more information on remote applications, see Chapter 11, "Managing Remote Applications," on page 117.

Title: Provides a field where you can specify a title.

User List: Provides a field that enables you to specify other Teaming users, using Type-to-Find functionality. When you specify a user's name when you modify the workspace, as described in Section 8.5, "Populating Elements in the Folder View," on page 70, Teaming displays the user's name on the folder home page, with links to his or her personal workspaces.

8.6.2 Folder View Elements

Any form element that you create can be added as a view element, if you want it to show up in the view.

The following elements are specific to views; they cannot be added to a form.

Accessory Panel: Displays the Accessory Panel on the workspace home page. Users can use this panel to add community or personal accessories, depending on their individual rights.

For more information on Accessories, see "Managing Accessories" in the *Novell Teaming 2.0 User Guide*.

Discussion Folder: Displays folder entries in the Discussion folder view.

Entry Creation Date: Displays the date and time that an entry was created.

Entry Creator: Displays the creator of an entry.

Entry Creator and Creation Date: Displays who created the entry and when they created it.

Landing Page Layout: Adds a landing page creation form that enables you to create landing page elements to display in your folder.

You must add the Landing Page Layout layout option in the folder form before you can add it as a view element.

Picture: Provides a field that enables you to browse for and upload pictures.

Remote Application: Enables you to choose a remote application to display.

Remote applications must be created and enabled for use by the Teaming administrator.

8.7 Understanding Layout Options

Layout options can enhance the presentation of your folder forms and views.

When you are adding layout options to a form, remember that you need to add that same layout options to the view in order for it to be displayed in the folder.

You can add the following layout options:

Box: Places a box around the specified elements.

Custom JSP: Enables you to reference a custom JSP from the Teaming directory.

Custom JSPs must be created by Teaming administrators.

Divider: Displays a horizontal line between elements.

Expandable Area: Displays an expandable tree element.

Use this option if your form is exceptionally long.

Fieldset: Provides a box that you can place other elements inside of.

HTML: Adds HTML formatting.

Landing Page Layout: (For the View Definition, the Landing Page Layout is in the *Elements* section) Adds a landing page creation form that enables you to create landing page elements that you can populate when you modify your workspace.

Three Column Table: Enables you to add elements within a three-column table.

Two Column Table: Enables you to add elements within a two-column table.

Designing Custom Folder Entry Forms

9

Folder Entry forms in Novell® Teaming can be customized to suit your precise business needs. You can create your own custom entry forms and views by using the Teaming Form and View Designers tool, or you can download existing custom entry forms from the Novell Teaming Library.

Before you begin creating custom folder entry forms, you might want to view the short tutorial video, Setting Up a Custom Form (http://www.brainstorminc.com/cbt/teaming/index.php?category=customizations). To display the video, follow the link, then click *Setting Up a Custom Form*.

9.1 Downloading Existing Custom Forms and Workflows

The Novell Teaming Library is a project that provides a library of existing Teaming folder entry forms and workflows that have been designed to solve specific business problems. You can easily download the custom forms and workflows, then import them into your Teaming environment. You can further customize these forms and workflows to suit your individual business needs.

1 Go to the Novell Teaming Library Web site (http://www.novell.com/communities/coolsolutions/formandflowfactory).

2 Select the custom form or workflow that you want to use in your Teaming environment.

3 In the *Attachment* section, click the `zip` file to download it.

4 Import the file into your Teaming environment and deploy it for use.

For information on how to do this, follow the Novell Teaming Library Deployment Instructions (http://www.novell.com/communities/node/8359/deployment-instructions-boulder-teaming-2).

9.2 Creating a Custom Folder Entry Form

Novell Teaming enables you to create custom folder entry forms. For example, you can create a custom entry form for an expense report.

Figure 9-1   *Expense Report Custom Folder Entry*

To create a custom folder entry form:

1 Navigate to the folder or workspace where you want to create the custom entry form.

If you create the entry form in a folder, then that form can be applied only to entries in that folder. If you create the entry form in a workspace, then that form can be applied to entries in any folder in the workspace.

2 Click *Manage > Form and View Designers*.

The Form and View Designers page is displayed.

3 Click *New > Entry Definitions*.

The Add a New Definition form is displayed.

4 Specify the following information:

Caption: Specify a name for the folder entry.

This is the name that appears in the Teaming interface. Users see it when they create an entry of this type. (For example, "Expense Report.")

Name: Specify the internal name for the folder entry.

The name that you enter in this field is not visible to users who create this type of entry. (For example, "expense_report.")

Family: Select the item type that is closest to the function of the item you are creating. Users can use the family type when performing filtered searches.

Allowed Comments/Reply Types: Select all of the comments or reply types that you want to allow on the entry.

When users comment on this type of entry, they can choose from the options that you specify in this section.

To select multiple options, hold the Ctrl key while selecting the comment or reply types.

5 Click *OK*.

6 Continue with Section 9.3, "Designing a Custom Folder Entry Form," on page 77.

9.3 Designing a Custom Folder Entry Form

The steps in this section describe how to customize (design) a folder entry form after it has already been created. For information on how to create a custom folder entry form, see Section 9.2, "Creating a Custom Folder Entry Form," on page 75.

You can design an entry immediately after you create it, or you can modify the design of an existing entry. For information on how to modify an existing entry form, see Section 9.4, "Modifying an Existing Entry Form," on page 81.

Teaming enables you to design the entry form, the entry view, or the summarized entry view.

- Section 9.3.1, "Designing the Entry Form," on page 77
- Section 9.3.2, "Designing the Entry View," on page 79
- Section 9.3.3, "Designing the Summary View," on page 80

9.3.1 Designing the Entry Form

The entry form is what users see when they are creating a new entry. This form needs to contain all of the fields necessary for users to create this type of entry. For example, an Expense Report form needs to contain the expense code, the purpose for the expense, the cost of the expense, and so forth.

After you add elements and layout options to the entry form, you must then add all of the elements and layout options to the entry view in order for them to be displayed when users view the entry. For information on how to add features to the workspace view, see "Designing the Workspace View" on page 60.

Teaming provides you with all of the tools necessary to create an entry form for any type of entry.

1 Under the custom entry form that you created, expand *Entry Form Definition*, then expand *Form*.
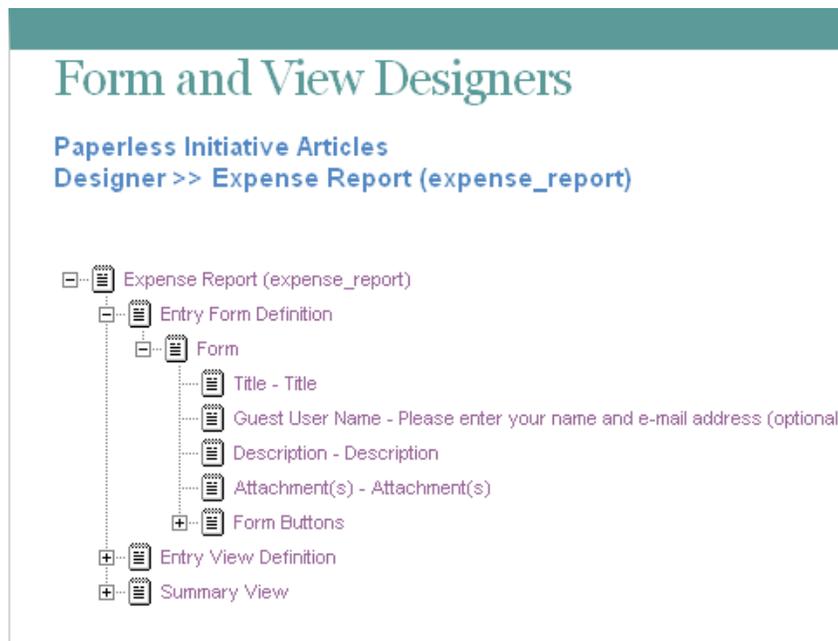
Adding Additional Elements to a Form

1 Click *Form*.

2 In the Form window, on the right side of the page, click *Add*.

3 In the *Standard Form Elements* section, click the element that you want to add.

For information on the types of elements that you can add, see Section 9.5.1, "Entry Form Elements," on page 82.

4 Specify the appropriate information.

5 Click *OK*.

Modifying Elements in a Form

1 Expand *Form*, then click the element that you want to modify.

2 In the window on the right side of the page, click *Modify*.

3 Make the desired modifications, such as changing the caption or data name, then click *OK*.

Based on the modifications that you make to a form element, you might need to make the same modifications to the corresponding view element.

Adding Additional Layout Options to a Form

1 Click *Form*.

2 In the Form window, on the right side of the page, click *Add*.

3 In the *Layout Options* section, click the layout option that you want to add.

For information on the types of layout options that you can add, see Section 9.6, "Understanding Layout Options," on page 83.

4 Specify the appropriate information.

5 Click *OK*.

9.3.2 Designing the Entry View

The entry view is how the information from your entry form is displayed to users who view your entry. Every form must have a corresponding view. This view needs to contain all of the fields necessary for users to get the information they need when viewing the entry; it is made up of elements from the form.

Before you can add elements and layout options to the entry view, you must first add those same elements and layout options to the entry form in order for them to be displayed in your entry. For information on how to add features to the entry form, see "Designing the Entry Form" on page 77.

Teaming provides you with all of the tools necessary to create an entry view for any type of entry.

1 Under the custom entry form that you created, expand *Entry View Definition*.
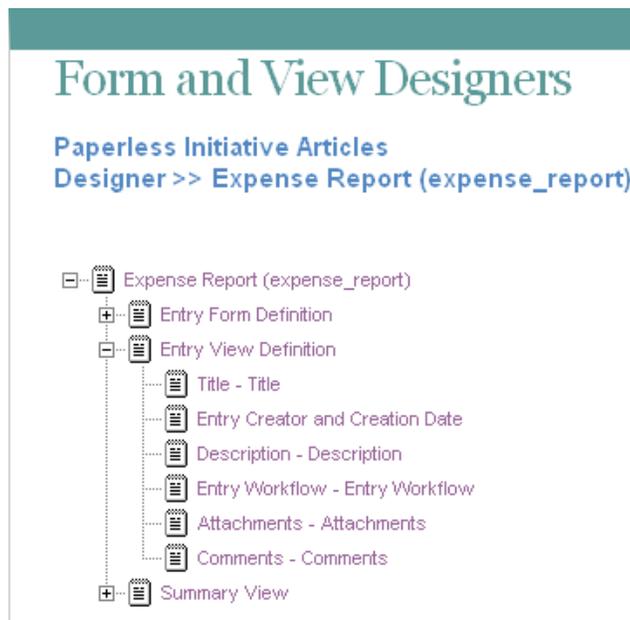
Adding Additional Elements to an Entry View Definition

1 Click *Entry View Definition*.

2 In the Entry View Definition window, on the right side of the page, click *Add*.

3 In the *Standard Form Elements* section click the element that you want to add.

For information on the types of elements that you can add, see Section 9.5.2, "Entry View Elements," on page 83.

4 Specify the appropriate information.

5 Click *OK*.

Adding Additional Layout Options to an Entry View Definition

1 Click *Entry View Definition*.

2 In the Entry View Definition window, on the right side of the page, click *Add*.

3 In the *Layout Options* section, click the layout option that you want to add.

For information on the types of layout options that you can add, see Section 9.6, "Understanding Layout Options," on page 83.

4 Specify the appropriate information.

5 Click *OK*.

9.3.3 Designing the Summary View

The summary view is used to display entries in a folder before the entries are opened.

Teaming provides you with all of the tools necessary to create a summary view for any type of entry.

1 Under the custom entry form that you created, expand *Summary View*.

Adding Additional Elements to a Summary View

1 Click *Summary View*.

2 In the Summary View window, on the right side of the page, click *Add*.

3 In the *Standard Form Elements* section click the element that you want to add.

For information on the types of elements that you can add, see Section 9.5.2, "Entry View Elements," on page 83.

4 Specify the appropriate information.

5 Click *OK*.

Adding Additional Layout Options to a Summary View

1 Click *Summary View*.

2 In the Summary View window, on the right side of the page, click *Add*.

3 In the *Layout Options* section, click the layout option that you want to add.

For information on the types of layout options that you can add, see Section 9.6, "Understanding Layout Options," on page 83.

4 Specify the appropriate information.

5 Click *OK*.

9.4 Modifying an Existing Entry Form

1 In the folder or workspace where the custom folder entry was created, click *Manage > Form and View Designers*.

The Form and View Designers page is launched.

2 Expand *Entry Definitions*, then click the custom entry that you want to modify.

3 Continue with Section 9.3, "Designing a Custom Folder Entry Form," on page 77.

9.5 Understanding Elements

Elements make up the content of your forms and views.

When you are adding elements, remember that when you add an element to a form, you need to add that same element to the view in order for it to be displayed in the custom form.

You can add the following elements:

◆ Section 9.5.1, "Entry Form Elements," on page 82
◆ Section 9.5.2, "Entry View Elements," on page 83

9.5.1 Entry Form Elements

Checkbox: Displays a check box that can be selected and deselected.

Date: Displays a field that launches a calendar applet when users click inside it.

Date and Time: Displays two fields. The first field launches a calendar applet, and the second field launches a time-selection applet when users click inside.

Event: Displays fields that enable users to specify the start time and end time of an event.

File Upload: Provides a field that enables users to browse for and upload files.

Form Buttons: Displays the *OK* and *Cancel* buttons.

Group List: Provides a Type-to-Find field that enables users to find and select Teaming groups.

HTML Editor Text Area: Provides an HTML text area where users can compose messages, create links, upload pictures, and more.

Hidden Field: Adds a hidden element. When you design the custom form, you can use this element to add boilerplate text to every entry that is created. This text is "hidden" because it does not show up on the entry form when users are creating an entry; however, the text does show up on the entry view after the entry is created.

Icon: Enables the workspace owner to choose an icon to represent the workspace.

Picture: Provides a field that enables users to browse for and upload pictures.

Places: Displays a workspace tree that enables users to browse to and select folders.

Radio Buttons: Enables you to display options that users can select with radio buttons.

Remote Application: Enables you to choose a remote application to display.

Remote applications must be created and enabled for use by the Teaming administrator.

Selectbox: Enables you to display options that users can select with a selectbox.

Send E-Mail When Entry is Submitted: Provides an option that enables users to automatically send an e-mail to other Teaming users, after the entry is submitted.

Subscribe to This Entry: Provides an option that enables users to subscribe to the entry.

Survey: Provides options that enable users to create a survey.

Team List: Provides a field that enables users to specify teams.

Text: Provides a field where users can enter text.

Title: Provides a field where users can enter a title for the entry.

User List: Provides a field that enables users to specify other Teaming users, using Type-to-Find functionality.

User List Selectbox: Adds a list of users. This list is taken from the user element that is defined at the folder level.

9.5.2 Entry View Elements

Any form element that you create can be added as a view element, if you want it to show up in the view.

The following elements are specific to views; they cannot be added to a form.

Attachments: Displays all attachments.

Comments: Displays all comments.

Description: Displays the entry description.

Entry Creation Date: (Not available with a Summary View) Displays the date that the entry was created.

Entry Creator: (Not available with a Summary View) Displays who created the entry.

Entry Creator and Creation Date: (Not available with a Summary View) Displays who created the entry and when they created it.

Entry Workflow: Displays the workflow process, the state of the workflow process, and any actions to be performed on the workflow.

Remote Application: (Not available with a Summary View) Enables you to add custom applications that are running on a separate server.

For more information on remote applications, see Chapter 11, "Managing Remote Applications," on page 117.

Replies: This is where all replies to an entry are listed. You can move this section to another location in the entry view by moving this element.

9.6 Understanding Layout Options

Layout options can enhance the presentation of your forms and views.

When you are adding layout options, remember that when you add layout options to a form, you need to add that same layout options to the view in order for it to be displayed in the custom form.

You can add the following layout options:

Box: Places a box around the specified elements.

Custom JSP: Enables you to reference a custom JSP from the Teaming directory.

Custom JSPs must be created by Teaming administrators.

Divider: Displays a horizontal line between elements.

Expandable Area: Displays an expandable tree element.

Use this option if your form is exceptionally long.

Fieldset: Provides a box that you can place other elements inside of.

HTML: Adds HTML formatting.

Landing Page Layout: (For the View Definition, the Landing Page Layout is in the *Elements* section) Adds a landing page creation form that enables you to create landing page elements that you can populate when you modify your workspace.

Three Column Table: Enables you to add elements within a three-column table.

Two Column Table: Enables you to add elements within a two-column table.

Creating and Managing Workflows

10

Novell® Teaming enables you to create custom workflows to streamline important business processes. Teaming Administrators can create workflows and implement them across the entire site, and individual folder and workspace owners can create workflows to be used in their respective folders and workspaces.

After you have created a workflow, you can perform the management functions that are described in this section. You can enable workflows to automatically start when certain types of entries are created in the folder, when users comment on or reply to an entry, or you can configure them to be manually started by users who view the entry.

Examples of workflows include approving documents, ordering supplies, hiring new employees, requesting paid time off, and getting expense reimbursements.

Before you begin creating and managing workflows, you might want to view the short tutorial video, Setting Up a Workflow (http://www.brainstorminc.com/cbt/teaming/index.php?category=customizations). To display the video, follow the link, then click *Setting Up a Workflow*.

10.1 Creating a Simple Workflow

If you have a straightforward business process that you think might benefit from a workflow, you can create a simple workflow to help automate that process, and you don't need in-depth workflow training to do it.

For example, you might want to create a workflow that automates the review process of articles for the company magazine. To create this and other simple workflows, complete the following sections:

10.1.1 Creating the Workflow Definition

1 Navigate to the workspace or folder where you want to create the workflow.

You can create workflows at the workspace level or at the folder level. If you create a workflow at the workspace level, that workflow can be applied to all sub-folders and sub-workspaces. If you create a workflow at the folder level, that workflow can be applied only to that folder, and to the folder's sub-folders.

2 In the Workspace or Folder toolbar, click *Manage > Form and View Designers*.

The Form and View Designers page is displayed.

3 In the Form and View Designers page, click *New > Workflow Processes*.

The Add a New Definition form is displayed.

4 Specify the following information:

Caption: Specify a name for the workflow process.

This is the name that appears in the Teaming interface. Users see it when they use this workflow. (For example, "Article Production.")

Name: Specify the internal name for the workflow process.

The name that you enter in this field is not visible to users who use this workflow. (For example, "article_production.")

5 Click *OK*.

6 Continue with .

10.1.2 Adding Workflow States

Workflow states are the phases that a workflow goes through as it completes the business process.

For example, the Article Production workflow contains the following states: Article Composition, Peer Review, Edit, Manager Approval, Publish.

1 In the Designer page, expand the workflow definition that you created in .

Form and View Designers

Paperless Initiative Article
Designer >> Article Production (article_production)

⊟ ▤ Article Production (article_production)
└── ▤ Workflow Process

2 Click *Workflow Process*.

3 Click *Add*.

4 Click *State*.

5 Specify the following information:

Caption: Specify a name for the workflow state.

This is the name that appears in the Teaming interface. Users see it when they use this workflow. (For example, "Article Composition.")

Name: Specify the internal name for the workflow state.

The name that you enter in this field is an internal-use database name. Names for elements in a definition must be unique. The first character must be an alphabetic character (a-z, A-Z). For the rest, legal characters are alphanumeric characters (a-z, A-Z, 0-9), hyphens (-), and underscores (_).

Description: Describe the function of the state.

6 Click *OK*.

7 Repeat Step 2 through Step 6 to add additional workflow states.

The new states are added to the workflow and appear in the *Workflow Preview* section at the bottom part of the window.

For more information on the *Workflow Preview* section, see Section 10.3, "Visually Representing a Workflow," on page 106.
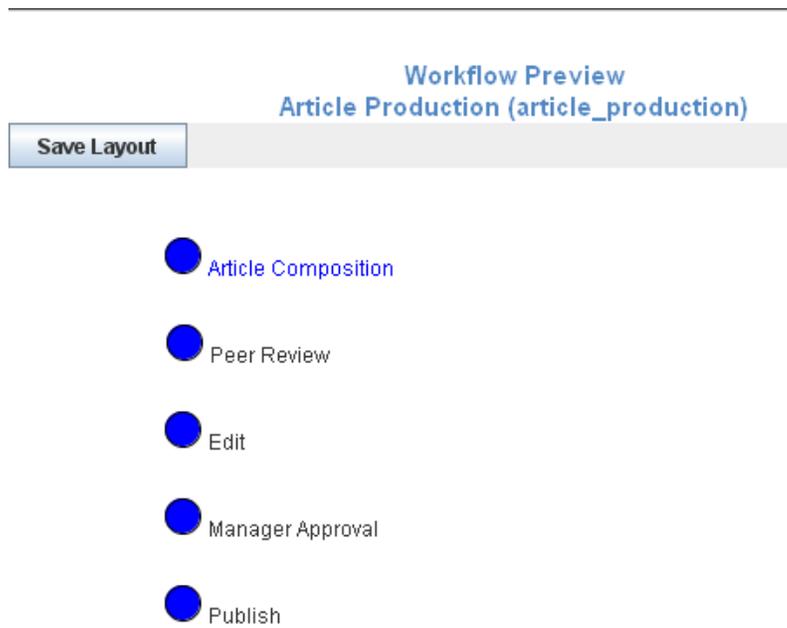
8 Continue with Section 10.2.3, "Adding Workflow Start and End States," on page 94 for information on how you can define start and end states for your workflow.

10.1.3 Adding Workflow Start and End States

Teaming enables you to add a Start and End state to your workflow. This is important, because without an End state, a workflow does not officially stop unless you manually stop the workflow. Adding an End state to a workflow automatically stops the workflow when it reaches the final state.

1 Click *Workflow Process*.

2 In the Workflow process window, specify the following information:

Initial State: Select the Start state of the workflow process.

End State: Select the End (final) state of the workflow process.

You can select multiple End states by holding the Ctrl key while clicking additional states.

Background Actions Will Run in the Context Of: Select either *Entry Owner* or *Folder Owner*.

3 Click *OK*.

In the *Workflow Preview* section, the Start state is marked with yellow, and the End state is marked with red.

For more information on the *Workflow Preview* section, see .

4 Continue with for information on how you can create transitions that move an entry from one workflow state to the next.

10.1.4 Adding Manual Transitions

After you have defined the workflow states, you need to create transitions that move an entry from one state to the next. The easiest kind of transitions to implement are manual transitions.

Manual transitions provide a drop-down list in the entry that allows the user to choose when to transition the entry. The workflow creator decides which workflow states the user can select in the drop-down list.

For example, from the "Article Composition" state, the workflow creator might allow the user to transition the entry to either the "Peer Review" or the "Edit" state.

To create manual transitions from one workflow state to the next workflow state:

1 Expand *Workflow Process*, then expand the workflow state where you want to transition the entry from.

For example, the workflow creator expands the "Article Composition" state.

2 Click *Transitions*, then click *Add* in the *Transitions* box in the right section of the Designer page.

3 Click *Manual Transition*.

For information regarding the other transition types available, see Section 10.2.4, "Adding Transitions," on page 95.

4 In the *To State* select box, select the state where you want to allow users to transition the entry.

5 Click *OK*.

Repeat Step 2 through Step 5 if you want to allow users to select from multiple states.

6 Repeat this procedure for all other states in the workflow.

In the *Workflow Preview* section, you see a diagram representing all of your workflow states (circles) and transitions (arrows).

For more information on the *Workflow Preview* section, see Section 10.3, "Visually Representing a Workflow," on page 106.

Workflow Preview
Article Production (article_production)

7 Continue with

10.1.5 Sending E-Mail Notifications

Now that you have added your workflow states and specified how the entry will transition through those states, you need to set up notifications that inform Teaming users when they need to take action on the entry as it moves into a state corresponding with their area of expertise.

For example, Julio composes an article for the company magazine. After he composes the article, he transitions the entry to the next workflow state, "Peer Review." Anne, Julio's co-worker, then receives an e-mail message notifying her that an article is ready for her to review. After Anne reviews the article, she transitions it to the next workflow state, "Edit," and so forth.

1 Expand the workflow definition, then click the workflow state where you want the notification to be sent.

For example, click *Peer Review*.

2 Click *Add*.

3 Click *On Entry*.

4 In the On Entry box, click *OK*.

5 Click *On Entry*. (This is located underneath the workflow state where you just created it.)

In the *On Entry* box, you can select from many options. These are actions that you can choose to perform when the entry enters this workflow state, such as move the entry to another location, copy the entry, or send notifications. For this basic workflow example, simply select to send e-mail notifications.

For information about all of the options that you can choose to perform when an entry enters a workflow state, see

6 Click *Add > Notifications*.

7 In the *Notifications* box, specify the following information:

Entry Creator: Select this option if you want to send a notification to the user who created the entry.

Team: Select this option if you want to send a notification to the entire team.

Users: Use the provided field to specify individual users to whom you want to send a notification.

Groups: Use the provided field to specify individual groups to whom you want to send a notification.

Select an Entry Type: Use the drop-down list to select the type of entry that most closely represents the type of entry that is going through the workflow.

Text to be Put in the Notification Subject Line: Specify the text that you want to appear in the subject line of the notification that is sent.

For example, `Peer Review Needed`.

Append the Entry Title: (Optional) Select this option if you want the entry title to appear after the text in the subject line.

Text to be Put in the Notification Body: Specify text that you want to appear in the main body of the e-mail notification. You can also select *Append the Entry Body* if you want the main body of the entry to display with the e-mail notification message.

Any text formatting that you use in this field needs to be done in the HTML format. Following are some examples of HTML formatting:

- `<i></i>` for italics
- `<b></b>` for bold
- `<br>` for a break (return/enter)
- `<p></p>` for a new paragraph
- `<a href="`*www.example.com*`"></a>` for links to URLs

Append the Entry Body: (Optional) Select this option if you want the main body of the entry to display with the e-mail notification message.

8 Click *OK*.

9 Repeat this process for every workflow state where you want to have a corresponding e-mail notification message.

10.1.6 Enabling Your Workflow for Use

Now that you have created your workflow, you need to enable it. For information on how to do this, see Section 10.7, "Enabling Workflows," on page 112.

10.2 Creating an Advanced Workflow

This section expands the workflow design presented in Section 10.1, "Creating a Simple Workflow," on page 85.

For example, you might want to create a workflow that automates the expense reporting process for your department.

Figure 10-1   *Advanced Workflow Example*
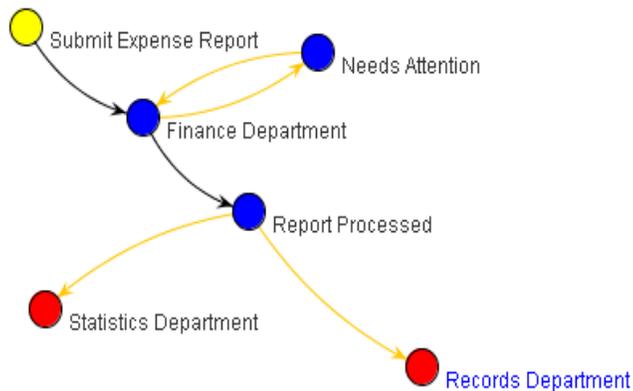
To create this and other advanced workflows, complete the following sections:

- Section 10.2.1, "Creating the Workflow Definition," on page 92
- Section 10.2.2, "Adding Workflow States," on page 93
- Section 10.2.3, "Adding Workflow Start and End States," on page 94
- Section 10.2.4, "Adding Transitions," on page 95
- Section 10.2.5, "Setting Up Transition Types," on page 97
- Section 10.2.6, "Adding On-Entry or On-Exit Events," on page 99
- Section 10.2.7, "Setting Up On-Entry and On-Exit Events," on page 100
- Section 10.2.8, "Adding a Parallel Workflow Thread," on page 103
- Section 10.2.9, "Chaining Workflows," on page 103
- Section 10.2.10, "Adding a Question to a Workflow," on page 103
- Section 10.2.11, "Enabling Your Workflow for Use," on page 105

10.2.1 Creating the Workflow Definition

1 Navigate to the workspace or folder where you want to create the workflow.

You can create workflows at the workspace level or at the folder level. If you create a workflow at the workspace level, that workflow can be applied to any folder or workspace included in the workspace. If you create a workflow at the folder level, that workflow can be applied only to that folder, and to the folder's sub-folders.

2 In the Workspace or Folder toolbar, click *Manage > Form and View Designers*.

The Form and View Designers page is displayed.

3 In the Form and View Designers page, click *New > Workflow Processes*.

The Add a New Definition form is displayed.

4 Specify the following information:

Caption: Specify a name for the workflow process.

This is the name that appears in the Teaming interface. Users see it when they use this workflow. (For example, "Expense Report Workflow.")

Name: Specify the internal name for the workflow process.

The name that you enter in this field is not visible to users who use this workflow. (For example, "expense_report_workflow.")

5 Click *OK*.

6 After you define a workflow, you need to add states to your workflow. For information on how to do this, continue with .

10.2.2 Adding Workflow States

Workflow states are the phases that a workflow goes through as it completes the business process.

For example, the Expense Report workflow contains the following states: Submit Expense Report, Finance Department, Needs Attention, Report Processed, Statistics Department, and Records Department.

1 In the Designer page, expand the workflow definition that you created in .

2 Click *Workflow Process*.

3 Click *Add*.

4 Click *State*.

5 Specify the following information:

Caption: Specify a name for the workflow state.

This is the name that appears in the Teaming interface. Users see it when they use this workflow. (For example, "Article Composition.")

You can use alphanumeric characters (a-z, A-Z, 0-9), dashes (-), underscores (_), and spaces.

Name: Specify the internal name for the workflow state.

The name that you enter in this field is an internal-use database name. Names for elements in a definition must be unique. The first character must be an alphabetic character (a-z, A-Z). For the rest, legal characters are alphanumeric characters (a-z, A-Z, 0-9), hyphens (-), and underscores (_).

Description: Describe the function of the state.

6 Click *OK*.

7 Repeat Step 2 through Step 6 to add additional workflow states.

The new states are added to the workflow and appear in the *Workflow Preview* section located in the bottom part of the window.

For more information on the *Workflow Preview* section, see Section 10.3, "Visually Representing a Workflow," on page 106.

8 After you have added states to your workflow, you need to define the Start and End states. For information on how to do this, see Section 10.2.3, "Adding Workflow Start and End States," on page 94.

10.2.3 Adding Workflow Start and End States

Teaming enables you to add Start and End states to your workflow. This is important, because without an End state, a workflow does not officially stop unless you manually stop the workflow. Adding an End state to a workflow automatically stops the workflow when it reaches the final state.

1 Click *Workflow Process*.

2 In the Workflow process window, click *Modify*.

3 Specify the following information:

Initial State: Select the Start state of the workflow process.

End State: Select the End (final) state of the workflow process.

You can select multiple End states by holding the Ctrl key while clicking additional states.

Background Actions Will Run in the Context Of: Select either *Entry Owner* or *Folder Owner*.

4 Click *OK*.

In the *Workflow Preview* section, Start states are marked with yellow, and End states are marked with red.

For more information on the *Workflow Preview* section, see Section 10.3, "Visually Representing a Workflow," on page 106.

○ Submit Expense Report

● Needs Attention

● Finance Department

● Report Processed

● Statistics Department

● Records Department

5 After you have defined Start and End states for your workflow, you need to set up transitions to transition the entry from one workflow state to the next. For information on how to do this, see Section 10.2.4, "Adding Transitions," on page 95.

10.2.4 Adding Transitions

After you have defined the workflow states, you need to create transitions that move an entry from one workflow state to the next.

1 Expand *Workflow Process*, then expand the workflow state where you want to transition the entry from.

For example, the workflow creator expands the "Submit Expense Report" state.

```
☐ Expense Report Workflow (expense_report_workflow)
   ☐ Workflow Process
      ☐ State - Submit Expense Report
         ⋮ Transitions
      ☐ State - Statistics Department
      ☐ State - Records Department
      ☐ State - Finance Department
      ☐ State - Report Processed
      ☐ State - Needs Attention
      ☐ State - state 8
```

2 Click *Transitions*, then click *Add* in the *Transitions* box in the right section of the Designer page.

3 Click the type of transition that you want to add.

You can set up a workflow to transition entries in any of the following ways:

Custom Transition: Use the custom transition if you want to integrate an external process with a Teaming workflow. To do this, consult with your Teaming administrator.

For example, you might want to synchronize a Teaming workflow with an external workflow. You can write some custom Java* code and use a custom transition to accomplish this.

Immediate Transition: The entry is immediately transitioned.

Manual Transition: Provides a drop-down list in the entry that allows the user to choose when to transition the entry. The workflow creator decides which workflow states the user can select in the drop-down list.

Transition After Time Elapsed: The entry is transitioned to the next workflow state after a specified amount of time.

Transition on Comment or Reply: The entry is transitioned to the next workflow state after a user makes a comment or a reply on the entry.

Transition on Entry Data Values: The entry is transitioned to a new state based on the value that a user specifies for a custom element in the entry.

For example:

- If you want to assign an entry to a specific state based on a value the user selects, you define a custom element with multiple values from which a user can make a selection (from a drop-down list on the form). Map each of these values to specific states in the initial workflow state by using the *Transition on entry data values* option. This option is useful for assigning help tickets in a help desk, assigning entries to the appropriate review contact, and so on.

- If you want to transition an entry at a specific time, you can transition the entry based on a custom date element.

Transition on Modify: The entry is transitioned to a new state when it is modified.

This can be useful for review purposes.

Transition on Response: Allows you to transition an entry to a new state based on a response to a question in the entry. Map each possible answer to a workflow question to one of these transitions using the *Data name* for each *Workflow response*.

For specific instructions on how to do this, see Section 10.2.10, "Adding a Question to a Workflow," on page 103.

Transition on a Variable: You can make decisions based on the value of a variable that you set. Consider a process that sends e-mail notifications when it enters a state, the process re-enters that same state later in the process, but you do not want to send the notifications more than once. Set up that first state so that it sends notifications only if the "sent notifications" variable is not true.

Wait for Parallel Thread(s) to End: Allows you to transition an entry to a new state when one or more specified parallel workflow threads end.

4 After you select a transition type in Step 3, you are required to set up the transition. Each transition type requires you to specify different setup options.

For specific information regarding the information that you need to specify for the individual fields, see "Setting Up Transition Types" on page 97.

5 Click *OK*.

6 Repeat Step 1 through Step 5 for all other states in the workflow.

In the *Workflow Preview* section, you see a diagram representing all of your workflow states (circles) and transitions (arrows).

For more information on the *Workflow Preview* section, see Section 10.3, "Visually Representing a Workflow," on page 106.
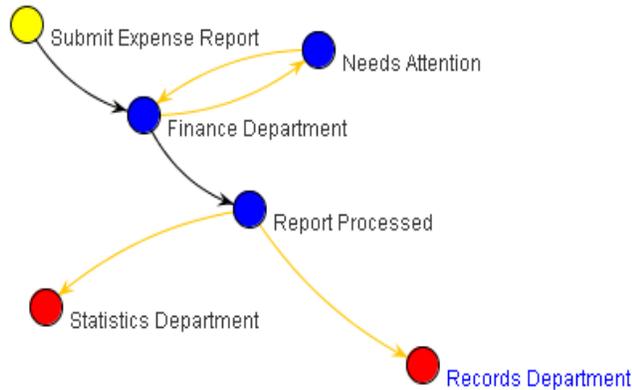
7 After you have set up how entries transition from one workflow state to another in your workflow, you can set up events to occur when the entry enters or exits particular workflow states. For information on how to do this, as well as the kinds of entry and exit events that you can set up, see Section 10.2.6, "Adding On-Entry or On-Exit Events," on page 99.

10.2.5 Setting Up Transition Types

When you choose a specific type of transition, you might need to provide specific information regarding the type of transition that you selected.

Following are the types of transitions that you can choose from, and information describing the fields that you must complete in order to set up each type of transition:

- "Custom Transition" on page 97
- "Immediate Transition" on page 98
- "Manual Transition" on page 98
- "Transition After Time Elapsed" on page 98
- "Transition on Comment or Reply" on page 98
- "Transition on Entry Data Values" on page 98
- "Transition on Modify" on page 98
- "Transition on Response" on page 98
- "Transition on a Variable" on page 99
- "Wait for Parallel Thread(s) to End" on page 99

Custom Transition

Condition Class Name: Specify the Java filename where your Teaming administrator created the custom transition.

Consult with your Teaming administrator to get the name of this file.

To State: Select the state where you want to transition the entry.

Immediate Transition

To State: Select the state where you want to immediately transition the entry.

Manual Transition

To State: Select the state where you want to allow users to transition the entry.

After you create the transition, repeat Step 2 on page 95 through Step 5 on page 96 if you want to allow users to select from multiple states.

Transition After Time Elapsed

Numbers entered in the following fields must be whole values. Decimal points and fractions are not valid.

Days: Specify how many days to wait before the transition.

Hours: Specify how many hours to wait before the transition.

Minutes: Specify how many minutes to wait before the transition.

To State: Select the state where you want to transition the entry after the elapsed time that you specified.

Transition on Comment or Reply

To State: Select the state where you want to transition the entry after a user comments on or replies to the entry.

Transition on Entry Data Values

Match Entry Data Values:

To State: Select the state where you want to transition the entry.

Transition on Modify

To State: Select the state where you want to transition the entry when the entry is modified.

Transition on Response

Workflow Question: Specify the Data Name for the workflow question that you have previously defined.

For information on how to create a workflow question, see "Creating the Workflow Question" on page 104.

Workflow Response: Specify the Data Name for the workflow response that you have previously defined.

For information on how to create a workflow response, see "Creating Answers to the Workflow Question" on page 105.

To State: Select the state where you want to transition the entry after a user responds to the workflow question.

Transition on a Variable

Variable Name: Specify the name of the workflow variable that you want to be read to activate the transition.

You must have already created a workflow variable. You create a workflow variable as an On Entry or On Exit event, as described in Section 10.2.6, "Adding On-Entry or On-Exit Events," on page 99.

Variable Value: Specify the value of the workflow variable that you want to be read to activate the transition.

You must have already created a workflow variable. You create a workflow variable as an On Entry or On Exit event, as described in Section 10.2.6, "Adding On-Entry or On-Exit Events," on page 99.

To State: Select the state where you want to transition the entry.

Wait for Parallel Thread(s) to End

Parallel Thread Name: Select the parallel thread that you want to wait for.

Transition to State: Select the state where you want to transition the entry after all selected threads have ended.

10.2.6 Adding On-Entry or On-Exit Events

You can take action when a process enters or exits a workflow state. For example, when an entry enters (or exits) a workflow state, you can send a notification, begin or end a parallel process, set a variable, and more.

1 Navigate to and click the workflow state where you want to set up an event to occur when the entry enters or exits the state.

2 Click *Add*.

3 Click *On Entry* or *On Exit*, depending on whether you want the event to occur when the entry enters or exits the state.

4 In the On Entry (or On Exit) box, click *OK*.

5 Click *On Entry* or *On Exit*, depending on whether you are adding an On Entry or On Exit event. (This is located underneath the workflow state where you just created it.)

6 Click *Add*.

7 Click the type of event that you want to add.

   Copy Entry: Allows you to copy an entry to a new location in Teaming when it enters or exits a specific state.

   Custom Action: Use the custom action if you want to integrate an external process with a Teaming workflow. To do this, consult with your Teaming administrator.

   Move Entry: Allows you to move an entry to a new location in Teaming when it enters or exits a specific state.

Notifications: Allows you to notify specific users or groups about an entry when it enters or exits the state.

Remote Application: Remote applications communicate with a third-party on-line application, and send information from that third-party application back into Novell Teaming. You can enable a remote application to start when entries enter or exit a workflow state.

Remote applications need to be set up and configured by your Teaming administrator before you can add them.

Start a Parallel Workflow Thread: Allows you to start a parallel workflow when an entry enters or exits a specific state. Parallel workflows are useful if two or more processes need to occur simultaneously. Only when the parallel thread is finished can the main workflow thread proceed.

Before you can start a parallel workflow thread, you first need to create it. For information on how to create a parallel workflow thread, see Section 10.2.8, "Adding a Parallel Workflow Thread," on page 103.

Start a Workflow Process: Teaming enables you to chain workflows together. When you are creating a workflow (or modifying an existing workflow), you can start an existing workflow process on the workflow you are creating (or modifying). This can speed up the workflow creation process by helping you make use of existing workflows.

Starting an existing workflow process is not the same as starting a parallel workflow thread. Unlike a parallel workflow thread, when you chain workflows together by starting an existing workflow process, there is no way to share variables or states between the two workflows; in other words, there is no physical connection between the two workflows.

Stop a Workflow Thread: Allows you to stop a parallel workflow when an entry enters or exits a specific state.

Workflow Variable: Defines a variable to be used when transitioning a workflow.

This workflow variable is referenced with the Transition On a Variable transition, as described in Section 10.2.4, "Adding Transitions," on page 95.

8 After you select an event in Step 7, you need to set up the event. Each event type requires you to specify different setup options.

For specific information regarding the information that you need to specify for the individual fields, see Section 10.2.7, "Setting Up On-Entry and On-Exit Events," on page 100.

9 Click *OK*.

10 Repeat this procedure for all other states in the workflow where you want to set up on-entry or on-exit events.

11 Now that you have set up events to occur when an entry enters or exits particular workflow states, you can set up access controls on the workflow. For information on how to do this, see Section 10.4, "Adding Access Controls," on page 107.

10.2.7 Setting Up On-Entry and On-Exit Events

Following are the types of events that you can choose from, as well as information describing the fields that you need to complete in order to set up each type of event:

- "Copy Entry" on page 101
- "Custom Action" on page 101
- "Move Entry" on page 101

Copy Entry

Select the Destination Folder: Select the folder where you want to copy the entry to.

Selected Folder: Displays the destination folder that you selected.

Custom Action

Action Class Name: Specify the name of the custom action that your Teaming administrator has set up.

Work with your Teaming administrator for information on what you should put in this field.

Move Entry

Select the Destination Folder: Select the folder where you want to move the entry to.

Selected Folder: Displays the destination folder that you selected.

Notifications

Entry Creator: Select this option if you want to send a notification to the user who created the entry.

Team: Select this option if you want to send a notification to the entire team.

Users: Use the provided field to specify individual users to whom you want to send a notification.

Groups: Use the provided field to specify individual groups to whom you want to send a notification.

Select an Entry Type: Use the drop-down list to select the type of entry that most closely represents the type of entry that is going through the workflow.

Text to be Put in the Notification Subject Line: Specify the text that you want to appear in the subject line of the notification that is sent.

For example, `Peer Review Needed`.

Append the Entry Title: (Optional) Select this option if you want the entry title to appear after the text in the subject line.

Text to be Put in the Notification Body: Specify text that you want to appear in the main body of the e-mail notification. You can also select *Append the Entry Body* if you want the main body of the entry to display with the e-mail notification message.

Any text formatting that you use in this field needs to be done in the HTML format. Following are some examples of HTML formatting:

- `<i></i>` for italics
- `<b></b>` for bold
- `<br>` for a break (return/enter)
- `<p></p>` for a new paragraph
- `<a href="www.example.com"></a>` for links to URLs

Append the Entry Body: (Optional) Select this option if you want the main body of the entry to display with the e-mail notification message.

Remote Applications

Remote Application: Provides a drop-down list that enables you to select from the available remote applications.

Remote applications need to be set up and enabled by your Teaming administrator before you can use them. For more information about remote applications, see Chapter 11, "Managing Remote Applications," on page 117.

Variable Name: Specify the name of the variable that will contain the results that are returned by the remote application.

Execute Action in the Context Of: From the select box, select who you want the remote application to be in relation to: *Active User*, *Entry Owner*, or *Folder Owner*.

Start a Parallel Workflow Thread

Parallel Thread Name: Select the parallel workflow thread that you want to start.

You must have already created the parallel workflow thread in order for it to be displayed in this list.

For information on how to create a parallel workflow thread, see Section 10.2.8, "Adding a Parallel Workflow Thread," on page 103.

Start a Workflow Process

Workflow Process: From the drop-down list, select the workflow process that you want to start.

Stop a Workflow Thread

Parallel Thread Name: Select the workflow thread that you want to stop.

Workflow Variable

Variable Value: Specify the name of the workflow variable.

Variable Name: Specify the value of the workflow variable.

This is the name that is referenced internally.

10.2.8 Adding a Parallel Workflow Thread

Teaming workflows support parallel workflow threads, which enable you to start a second workflow inside of an existing workflow. Parallel workflows are useful if two or more processes need to occur simultaneously. The main workflow is dependent on the parallel workflow thread; only when the parallel thread is finished can the main workflow thread proceed.

To create a parallel workflow thread:

1 Click *Workflow Process*.

2 Click *Add > Parallel Workflow Thread*.

3 Specify the following information:

Caption: Specify a name for the parallel workflow thread.

This is the name that appears in the Teaming interface, that users see when they use this workflow thread.

Data Name: Specify the internal name for the parallel workflow thread.

The name that you enter in this field is not visible to users who use this workflow thread.

Start State: Select the first state in the parallel workflow thread.

End State: Select the last state in the parallel workflow thread.

4 Click *OK*.

The parallel workflow thread is created.

For information on how to start and stop a parallel workflow thread after you have created it, see Section 10.2.6, "Adding On-Entry or On-Exit Events," on page 99.

10.2.9 Chaining Workflows

Teaming enables you to chain workflows together by starting a workflow process inside of a workflow that you are creating (or modifying). This can speed up the workflow creation process by helping you make use of existing workflows.

Starting an existing workflow process is not the same as starting a parallel workflow thread. Unlike a parallel workflow thread, when you chain workflows together by starting an existing workflow process, there is no way to share variables or states between the two workflows; in other words, there is no physical connection between the two workflows.

You chain workflows by adding an On Entry or On Exit option to the workflow state where you want to add the existing workflow process. Use the On Entry or On Exit option to add the existing workflow process, as described in Section 10.2.6, "Adding On-Entry or On-Exit Events," on page 99.

10.2.10 Adding a Question to a Workflow

Workflow questions can enhance the ease and usability of workflows. For example, imagine a Time-Off Request workflow where a manager can respond to a request by simply selecting *Yes* or *No* in the workflow.

In the following example, if the manager selects *Yes*, the workflow is transferred to the next state of the workflow, *HR Approval*. If the manager selects *No*, the request is denied and the workflow is ended.

Figure 10-2 *Workflow Question Layout*
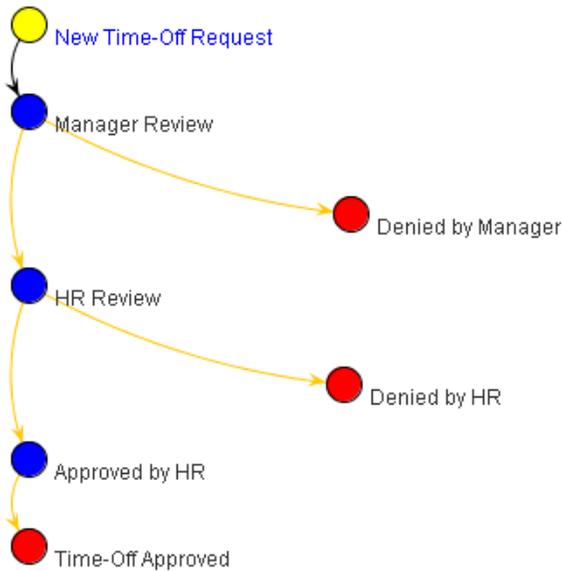
* "Creating the Workflow Question" on page 104
* "Creating Answers to the Workflow Question" on page 105
* "Creating Transitions" on page 105

Creating the Workflow Question

1 Click the workflow state where you want to add the workflow question.

A workflow question can be specific to a single state (each state can have only one associated question), or you can define a global question, which you can then associate with any number of states. Global questions are useful when multiple states require the same question and answer set.

2 Click *Add > Workflow Question*.

3 Specify the following information:

Question Text: Specify the question that you want to appear in the workflow.

For example, `Approve time-off request?`

Data Name: Specify the internal name for the workflow question.

This name must be unique because it is the name that you use to refer to the workflow question in future steps. For example, `approve_timeoff_request`.

4 Click *OK*.

5 Continue with "Creating Answers to the Workflow Question" on page 105.

Creating Answers to the Workflow Question

1 Click *Workflow Question*.

This is the question that you created in .

2 Click *Add > Workflow Response*.

3 Specify the following information:

Response Text: Specify a single response option.

For example, Yes.

Data Name: Specify the internal name for the workflow response.

For example, yes.

4 Click *OK*.

5 Repeat Step 1 through Step 4 to create multiple answers to the same workflow question.

Users using this workflow can choose from the answers that you create.

Creating Transitions

Now that you have created the workflow question and workflow answers, you need to create transitions that correspond to the answers that you created. This kind of transition is called "Transition on Response." For information on how to create a "Transition on Response" transition, see .

10.2.11 Enabling Your Workflow for Use

Now that you have created your workflow, you need to enable it. For information on how to do this, see .

10.3 Visually Representing a Workflow

Novell Teaming enables you to view a visual representation of your workflow, making the creation process easier by allowing you to envision the workflow in every step of its development.

As you create your workflow in the *Designer* section, the changes you make are automatically added to the *Workflow Preview* section below.

Figure 10-3 *Workflow Preview Section*
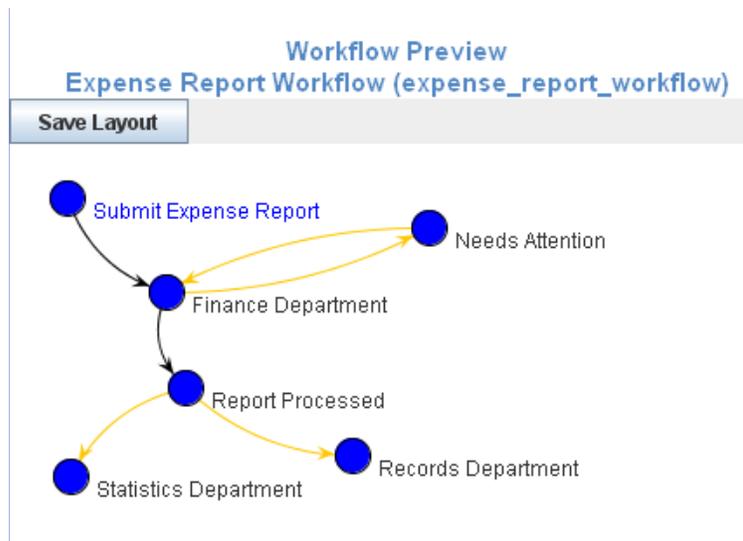
You can modify the workflow layout in the *Workflow Preview* section. You must save the layout after you have modified it.

- Section 10.3.1, "Modifying a Workflow Layout," on page 106
- Section 10.3.2, "Saving a Workflow Layout," on page 106

10.3.1 Modifying a Workflow Layout

You can easily modify the visual representation of a workflow. Modifying the workflow layout can make it easier to understand how a workflow process works because it can enable you to better visualize the process.

1 In the *Workflow Preview* section, click a workflow state and drag the state to the desired location.

Transition arrows automatically adjust to the new locations of the workflow states.

10.3.2 Saving a Workflow Layout

By default, every time you make a change in the *Designer* section when creating a workflow, any changes that you previously made in the *Workflow Preview* section are reverted if they have not been saved.

To save your layout in the *Workflow Preview* section:

1 Click *Save Layout* after you have modified your workflow layout.

Now when you make changes in the Designer section, the changes that you previously made to your workflow layout in the *Workflow Preview* section are retained.

10.4 Adding Access Controls

Novell Teaming enables you to set access controls on workflows that you create. You can set access controls on an entire workflow, or on the individual states of a workflow.

◆ Section 10.4.1, "Setting Access Controls on an Entire Workflow," on page 107
◆ Section 10.4.2, "Setting Access Controls on Individual States of a Workflow," on page 109

10.4.1 Setting Access Controls on an Entire Workflow

1 In the Designer page, expand the workflow definition that you created in Section 10.2.1, "Creating the Workflow Definition," on page 92.

2 Click *Workflow Process*.
3 Click *Add > Access controls*.
4 Click *OK*.
5 Expand *Workflow Process*, then click *Access controls*.

Form and View Designers

Paperless Initiative Article
Designer >> Expense Report Workflow (expense_report_workflow)

```
□ 📄 Expense Report Workflow (expense_report_workflow)
    □ 📄 Workflow Process
        ⊞ 📄 State - Submit Expense Report
        ⊞ 📄 State - Finance Department
        ⊞ 📄 State - Report Processed
        ⊞ 📄 State - Statistics Department
        ⊞ 📄 State - Records Department
            📄 Access controls
```

6 Click *Add*.

7 Click the access control setting that you want to add.

Delete Access: Enables you to grant specific users rights to delete entries as they transition through the workflow process.

Modify Access: Enables you to grant specific users rights to modify entries as they transition through the workflow process.

Read Access: Enables you to grant specific users rights to read entries as they transition through the workflow process.

Transition Into This State: Enables you to grant specific users rights to transition entries into any state in the workflow.

Transition Out of This State: Enables you to grant specific users rights to transition entries out of any state in the workflow.

8 Define the access control setting that you added in Step 7 by specifying the following information in the provided form:
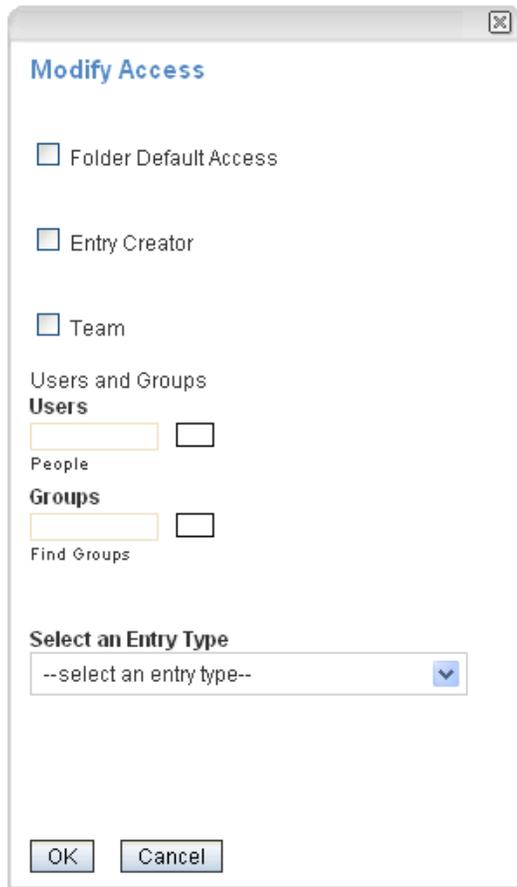
Folder Default Access: Select this option to grant access to all users who have access to the folder.

Entry Creator: Select this option to grant access to the user who created the entry.

Team: Select this option to grant access to the team.

Users: Use the provided field to specify individual users to whom you want to grant access.

Groups: Use the provided field to specify individual groups to whom you want to grant access.

Select an Entry Type: Use the drop-down list to select the type of entry that most closely represents the type of entry that is going through the workflow.

Select Elements within the Entry: Enables you to select elements that are contained in the entry. Users associated with that element are granted access.

For example, if you select *Task Entry* in the *Select an Entry Type* drop-down list, the options that you can select in the *Select Elements within the Entry* are: *Assigned to*, *Assigned to Groups*, *Assigned to Teams*.

9 Click *OK*.

10.4.2 Setting Access Controls on Individual States of a Workflow

1 In the Designer page, expand the workflow definition that you created in Section 10.2.1, "Creating the Workflow Definition," on page 92.

2 Expand *Workflow Process*, then click the state where you want to add the access controls.

3 Click *Add > Access controls*.

4 Click *OK*.

5 Expand the state where you just added the access controls, then click *Access controls*.

6 Click *Add*.

7 Click the access control setting that you want to add.

Following are the types of access control settings that you can add.

Delete Access: Enables you to grant specific users rights to delete entries when they are in this workflow state.

Modify Access: Enables you to grant specific users rights to modify entries when they are in this workflow state.

Read Access: Enables you to grant specific users rights to read entries when they are in this workflow state.

Transition Into This State: Enables you to grant specific users rights to transition entries into this state.

Transition Out of This State: Enables you to grant specific users rights to transition entries out of this state.

8 Define the access control setting that you added in Step 7 by specifying the following information in the provided form:

Folder Default Access: Select this option to grant access to users who have access to the folder.

Entry Creator: Select this option to grant access to the user who created the entry.

Team: Select this option to grant access to the team.

Users: Use the provided field to specify individual users to whom you want to grant access.

Groups: Use the provided field to specify individual groups to whom you want to grant access.

Select an Entry Type: Use the drop-down list to select the type of entry that most closely represents the type of entry that is going through the workflow.

Select Elements within the Entry:

9 Click *OK*.

10.5 Downloading Existing Custom Forms and Workflows

The Novell Teaming Library is a project that provides a library of existing Teaming folder entry forms and workflows that have been designed to solve specific business problems. You can easily download the custom forms and workflows, then import them into your Teaming environment. You can further customize these forms and workflows to suit your individual business needs.

1 Navigate to the Novell Teaming Library Web site (http://www.novell.com/communities/coolsolutions/teaminglibrary).

2 Select the custom form or workflow that you want to use in your Teaming environment.

3 In the *Attachment* section, click the `zip` file to download it.

4 Import the file into your Teaming environment and deploy it for use.

For information on how to do this, follow the Novell Teaming Library Deployment Instructions (http://www.novell.com/communities/node/8359/deployment-instructions-boulder-teaming-2).

10.6 Workflows Included with Teaming 2.0

The following workflows are included with Novell Teaming 2.0. To make these workflows functional, you simply need to enable them, as described in Section 10.7, "Enabling Workflows," on page 112.

- Section 10.6.1, "Publish Workflow," on page 112
- Section 10.6.2, "Task Workflow," on page 112

10.6.1 Publish Workflow

You can use the Publish workflow in the following ways:

Publish Entries to a Landing Page: You can use the Publish workflow to publish entries to a landing page, without the need to manually modify the contents of the landing page.

For more information, see Section 6.4, "Easily Updating Your Landing Page," on page 53.

Keep Entries Private: You can use the Publish workflow to keep entries private until you are ready to publish them for other Teaming users to read.

For example, you can associate the Publish workflow with a certain entry type in a folder (see Section 10.7.1, "Enabling Workflows to Start When an Entry is Created," on page 113 for more information). When you create an entry in the folder, the entry is created as Private. When you are ready for other Teaming users to view the entry, you can change the workflow status to Publish.

To transition the workflow status of an entry from Private to Publish:

1 Open the entry, and in the *Transition to* field, select *Publish* in the drop-down list.

2 Click *OK*.

To make the workflow status of the entry Private again:

1 Open the entry where you want to change the workflow status.

2 In the Entry toolbar, click *Workflow > Stop Workflow: Publish Workflow*, then click *OK* when you are asked if you really want to stop the workflow.

3 In the Entry toolbar, click *Workflow > Start Workflow: Publish Workflow*, then click *OK* when you are asked if you really want to start the workflow.

The workflow status of the entry is now Private.

10.6.2 Task Workflow

The Task workflow is used to allow all users who are assigned to a particular task to make modifications to the task, if they are not members of the workspace where the task resides.

10.7 Enabling Workflows

After a workflow is created, you can enable the workflow to automatically start when certain types of entries are created in the folder, or when users comment on or reply to entries. Or, you can enable users to manually start workflows when they view the entry.

Before you can enable a workflow, it first must be created. For information on how to create a workflow, see either Section 10.1, "Creating a Simple Workflow," on page 85 or Section 10.2, "Creating an Advanced Workflow," on page 91, depending on the type of workflow that you want to create.

You can enable workflows only in folders for which you have appropriate rights. When you enable a workflow in a folder, it is automatically enabled on all sub-folders and sub-workspaces, and can be applied to all entries that are created in that folder and its sub-folders.

10.7.1 Enabling Workflows to Start When an Entry is Created

You can enable a workflow to automatically start on all entries that are created in a specific folder, whenever an entry is created. This is called "associating workflows with entries."

1 Navigate to the folder where you want to enable the workflow.

2 In the Folder toolbar, click *Manage > Configure*.

The Configure Default Settings page is displayed.

3 In the *Workflows Associations* section, in the *Entry Types* section, click the drop-down list next to the entry type that you want to associate the workflow with, then select the desired workflow.

To add workflows to this drop-down list, you need to create them. After workflows have been created at this folder level, or at a higher workspace level, they appear in this list. For information on how to create workflows, see either Section 10.1, "Creating a Simple Workflow," on page 85 or Section 10.2, "Creating an Advanced Workflow," on page 91, depending on the type of workflow that you want to create.

4 Click *Apply > Close*.

Now, when this type of entry is created in this folder, Teaming automatically starts the workflow by placing the entry in the initial state of the workflow process that you specified.

When you enable a folder to support multiple entry types, you can associate workflows to the specific types of entries. For example, if you have a folder that supports both file entries and calendar entries, you can have one kind of workflow start when you create a file entry, and another kind of workflow start when you create a Calendar entry. For information on how to create multiple entry types in a single folder, see Section 3.2.1, "Enabling Alternate Folder Entry Types," on page 28.

10.7.2 Enabling Workflows to Start When Users Comment on or Reply to an Entry

You can enable a workflow to automatically start when users comment on or reply to an entry. This is called "associating workflows with comments or replies."

1 Navigate to the folder where you want to enable the workflow.

2 In the Folder toolbar, click *Manage > Configure*.

The Configure Default Settings page is displayed.

3 In the *Workflows Associations* section, in the *Comment or Reply Types* section, click the drop-down list next to the comment or reply type that you want to associate the workflow with, then select the desired workflow.

To add workflows to this drop-down list, you need to create them. After workflows have been created at this folder level, or at a higher workspace level, they appear in this list. For information on how to create workflows, see either Section 10.1, "Creating a Simple Workflow," on page 85 or Section 10.2, "Creating an Advanced Workflow," on page 91, depending on the type of workflow that you want to create.

4 Click *Apply > Close*.

Now, when this type of comment or reply is made to an entry in this folder, Teaming automatically starts the workflow by placing the entry in the initial state of the workflow process that you specified.

10.7.3 Allowing Users to Manually Start Workflows

You can allow users to decide if they want to start a workflow on an entry, and if they do, at what point they want to start the workflow. Also, you can give users the option to choose among multiple workflows for each entry.

1 Navigate to the folder where you want to enable users to start the workflows.

2 In the Folder toolbar, click *Manage > Configure*.

The Configure Default Settings page is displayed.

3 In the *Allowed Workflows* section, select the workflows that you want to allow users to choose from.

The *Local Definitions* section in the *Allowed Workflows* section displays all of the workflows that you have created locally. The other workflows listed in the *Allowed Workflows* section were either created by your Teaming administrator, by another user at a higher-level in the workspace tree, or are included with the Teaming product.

4 Click *Apply > Close*.

Now, when users create entries in this folder, they are able to start and stop workflows as they desire. For information on how to start and stop a workflow, see "Using Workflows" in the *Novell Teaming 2.0 User Guide*.

10.8 Testing A Workflow

To test a workflow, simply create the workflow in a testing workspace and ensure that it works according to your specifications. When the workspace is ready to be deployed in a production environment, export the workflow, then import it into the production workspace where you want to deploy it.

For information on how to import and export a workflow, see Section 10.9, "Importing and Exporting a Workflow," on page 115.

10.9 Importing and Exporting a Workflow

Novell Teaming enables you to import and export workflows into and out of Teaming.

- Section 10.9.1, "Importing a Workflow," on page 115
- Section 10.9.2, "Exporting a Workflow," on page 115

10.9.1 Importing a Workflow

1 Navigate to the workspace where you want to import the workflow.

2 In the Workspace toolbar, click *Manage > Form and View Designers*.

3 Click *Import*.

The Import Definitions page is launched.

4 Click *Browse*.

5 Browse for and select the workflow that you want to import.

6 Click *OK > Close*.

10.9.2 Exporting a Workflow

1 Navigate to the workspace where you created the workflow.

2 In the Workspace toolbar, click *Manage > Form and View Designers*.

3 Click *Export*.

The Export Definitions page is launched.

4 Expand *Workflow Processes*, then select the workflow that you want to export.

5 Click *OK*.

6 Select the location where you want to save the workflow, then save it.

Managing Remote Applications

11

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

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

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

This section describes how to set up remote applications after they have already been created and enabled by your Teaming administrator.

11.1 Adding Remote Applications to Views and Forms

Novell Teaming enables you to add a Remote Application element to a folder or workspace view or a custom form. The Remote Application element is a drop-down list that enables users of the view or form to select from a list of remote applications. This is useful if the current view or form does not allow you to select a remote application to run; it is also useful if you want to run multiple remote applications in a single view or form. (For specific information on configuring a view or form to run multiple remote applications, see Section 11.3, "Setting Up Multiple Remote Applications on a Single Page," on page 120.)

Unless you are the Teaming administrator, you can perform the following procedure only on custom views and forms for which you have appropriate rights.

To add a Remote Application element to a view or form:

1 Navigate to the workspace or folder where you want to add the Remote Application element.

If you want to add the Remote Application element to a form, navigate to the workspace or folder where the form was created.

2 In the Workspace or Folder toolbar, click *Manage > Form and View Designers*.

The Form and View Designers page is displayed.

3 Click the entry definition, folder view, or workspace view where you want to add the Remote Application element.

4 Add the Remote Application element to the desired folder view, workspace view, or entry definition, as described in the following sections:

Folder View	Section 8.2, "Designing a Custom Folder View," on page 66
Workspace View	Section 7.2, "Designing a Custom Workspace View," on page 58
Entry Definition (Form)	Section 9.3, "Designing a Custom Folder Entry Form," on page 77

11.2 Setting Up a Remote Application

11.2.1 In a Workspace

1 Navigate to the workspace or folder where you want to display the remote application.

2 Click *Manage > Modify This Workspace*, or *Modify This Folder*.

3 In the *Remote Application* section, click the drop-down list and select the remote application that you want to enable.

4 Click *OK*.

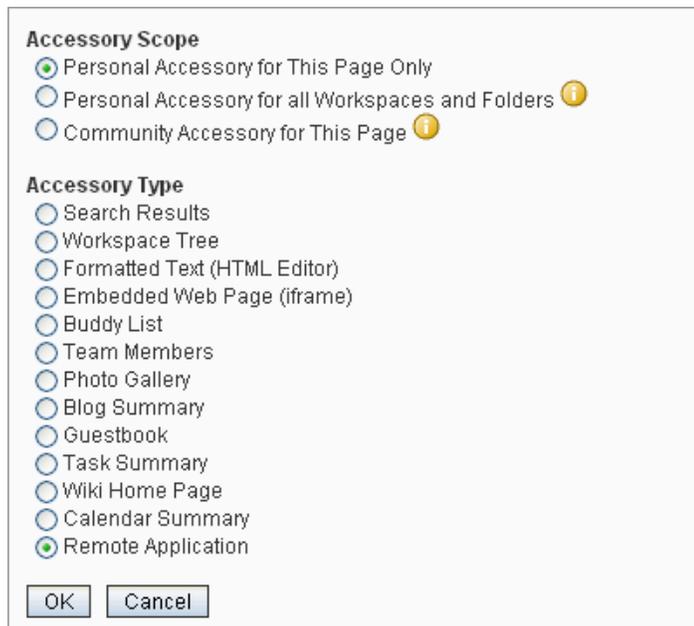The remote application is displayed at the top of the folder or workspace.

11.2.2 As an Accessory

This section describes how to create an accessory that references a remote application.

1 Navigate to the page where you want to create the Remote Application accessory.

2 Locate the Accessory Panel, then click *Accessory Panel*.

3 Click *Add an Accessory*.

4 Select the scope of the accessory you want to create, then click *Remote Application*.

5 Click *OK*.

6 Specify a title for the accessory, then in the *Remote Application* drop-down menu select the remote application that you want to add.

7 Click *Apply > Close*.

The new accessory is displayed.

11.3 Setting Up Multiple Remote Applications on a Single Page

You can use either of the following methods to set up multiple remote applications on a single Workspace or Folder.

11.3.1 Launching a Remote Application as an Accessory

If you want to view more than one remote application on a single Teaming page, you can view subsequent remote applications as accessories.

For more information on viewing remote applications as accessories, see Section 11.2.2, "As an Accessory," on page 119.

11.3.2 Creating a New Workspace or Folder View That Supports Multiple Remote Applications

If you don't want your remote application to be displayed as an accessory, but you still want to enable multiple remote applications on a single page, you can accomplish this by creating a new view for the workspace or folder where you want the remote applications to be displayed, and then configuring the workspace or folder to support the new view.

- "Configuring The Workspace or Folder to Support the New View" on page 121
- "Using the New View to Enable a Remote Application" on page 121

Creating the New View

1 In the Workspace or Folder where you want to enable additional remote applications, click *Manage > Form and View Designers*.

The Form and View Designers page is launched.

2 Click *New > Folder Views* or *Workspace Views*, depending on whether you are working in a workspace or folder.

3 Provide a caption and a name for the new definition.

4 Select the type of workspace for which you want to create the new definition.

5 Click *OK*.

6 Click the *Workspace Add/Modify Form* link.

7 In the box on the right side of the page, click *Add*.

8 In the *Form Elements* section, click *Remote Application*.

9 Provide a caption and a name for the new remote application field that you're creating.

The text that you enter in the *Caption* field is what the remote application field is called in the workspace or folder form.

10 Click *OK*.

11 Click *Close* to Exit the Form and View Designer.

Configuring The Workspace or Folder to Support the New View

1 Navigate to the workspace or folder where you want to implement the new definition that you created in "Creating the New View" on page 121.

2 Click *Manage > Configure*.

3 In the *Default View* section, select the new definition that you created in "Creating the New View" on page 121.

4 Click *Apply > Close*.

Using the New View to Enable a Remote Application

Now that you have created the new definition and configured the workspace or folder to support it, you need to enable the additional remote application.

To enable the additional remote application, see Section 11.2, "Setting Up a Remote Application," on page 118.

# 11.4 Managing Access Controls for Remote Applications

Because not all remote applications can be completely trusted, it is often a good idea to limit the privileges of the remote application. This section describes how you can accomplish this.

If you are running a trusted remote application, such as an application that you are maintaining on the same server as Teaming, then you do not need to set access controls on it.

When an application is restricted to a specific role, such as the Participant role, then the application can use Web services to perform only those tasks that are allowed for a Participant, including creating new entries, modifying entries that the user created, adding comments to entries, and so on. Participants cannot perform system administration tasks and cannot modify other users' entries.

To limit the remote application to privileges assigned to a specific role:

1 Access the top workspace in the hierarchy by clicking *Home Workspace* (this is the default name for the top workspace).

2 In the Workspace toolbar, click *Manage > Access Control*.

3 On the Configure Access Control page, click *Add an Application*.
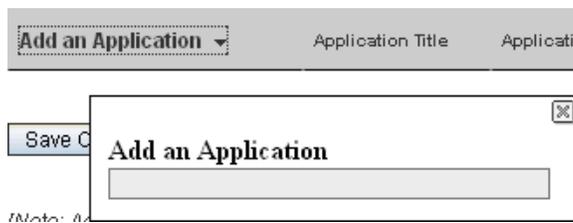
4 In the *Add an Application* field, use the Type-to-Find feature to specify and select the application that you want to add.

5 Close the *Add an Application* panel by clicking the *X* in the upper right corner.

6 In the access control table, select the check box that is located in the row of the remote application that you just added, and the column of the role that you want to assign to the application.

7 Click *Save Changes > Close*.

The application that you added is now restricted to those operations allowed to the role that you selected. For example, if you assigned the Participant role to the remote application, then the inheritance of workspace and folder access controls means that it is very likely that most workspaces and folders inherit this setting. Assuming that all places inherited this setting, the most powerful role the remote application can assume within the installation is that of a Participant.

If you are not sure what access control settings to assign to a particular remote application, consult with your Teaming administrator.

If your Teaming administrator has enabled multiple applications for your site, some of these applications might be grouped together in an Application Group. Application Groups are similar to groups that contain usernames. Application groups contain the names of registered applications. After a system administrator defines application groups, the workspace and folder owners can assign access-control roles to groups of applications instead of assigning roles to one application at a time.

Because workspace and folder owners can change the access control for places they own, you should communicate to your users about registered applications in the system and recommended access-control settings.

If you have a number of applications registered in the system, you should strongly consider creating application groups. Application groups are similar to groups that contain usernames. Application groups contain the names of registered applications. After a system administrator defines application groups, the workspace and folder owners can assign access-control roles to groups of applications instead of assigning roles to one application at a time.

What's New in Teaming 2.0

A

Welcome to Novell® Teaming 2.0. You'll find new features, a fresh user interface, and significant updates. The following list is an overview of the new advanced user features in Teaming 2.0.

A.1 Folder and Workspace Branding

Teaming 2.0 enables you to brand folders and workspaces. This is an additional way that you can customize a folder or workspace, and make it more identifiable to those who view and use it. For more information on branding a folder or workspace, see Chapter 5, "Branding a Folder or Workspace," on page 45.

A.2 Workspace Landing Page Creation

Teaming 2.0 enables you to create workspace landing pages, so you can present users with important information as soon as they access the workspace. For more information on creating workspace landing pages, see Chapter 6, "Creating and Managing Landing Pages," on page 47.

A.3 Chaining Workflows

Teaming 2.0 enables you to chain multiple workflows together. This gives you the ability to make complex workflows more simple, by breaking them down into more manageable segments. For more information on creating chained workflows, see Section 10.2.9, "Chaining Workflows," on page 103.

A.4 Workflow Activity History

Teaming 2.0 enables you to track the activity history of workflows. For more information on tracking the activity history of a workflow, see "Generating Reports about a Folder Entry" in the *Novell Teaming 2.0 User Guide*.

A.5 Library of Custom Forms and Workflows

The Novell Teaming Library is a collection of frequently used custom forms and workflows that you can download and import into your Teaming 2.0 environment. For more information, see the Novell Teaming Library Web site (http://www.novell.com/communities/coolsolutions/teaminglibrary).

A.6 Discussions Workspace

Teaming 2.0 provides a Discussions workspace. This type of workspace enables you to display a list of discussion topics. For more information about Discussions workspaces, see Section 2.2, "Creating and Managing a Discussions Workspace," on page 20.