FirstClass Training



Education & Training

FirstClass Communities User Guide



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Summary



In this module, you will learn about how FirstClass Communities can:

- deal with mail overload
- expose information that would otherwise be hidden in private email exchanges
- share files
- find others in your organization
- keep up with what's going on
- access information with your mobile device.

Introduction

FirstClass Communities brings together all of the social tools that have defined the modern internet into a safe organizational framework, where ideas prosper, knowledge is enhanced, and employee productivity thrives. This powerful Web 2.0-style solution has been designed to enable organizations to work faster, smarter, and more productively by connecting knowledge workers to the people and content important to them within a secure, collaborative, community-based environment.

With FirstClass Communities you can:

- Relieve the stress of email overload
- Let ideas and content flow between internal and external stakeholders
- Reveal people, content, and communities with social search
- Make your content a social object
- Fast track knowledge transfer and productivity
- Reduce the risk of inappropriate disclosure
- Engage the next generation workforce

Dealing with mail overload

If you're used to using an email product that simply lets you exchange private messages with others, you know how quickly your inbox fills up. Some of those messages are important, some are of interest, and the vast majority are marginal or outright spam. And the only way to sort out the good stuff is to wade through all of it.

FirstClass Communities doesn't dump everything in your inbox. You use FirstClass Communities to post to online communities. Each community deals with a particular subject, such as HR Policies. You just join the communities that interest you, and that immediately sorts out all that marginal stuff.



Exposing information

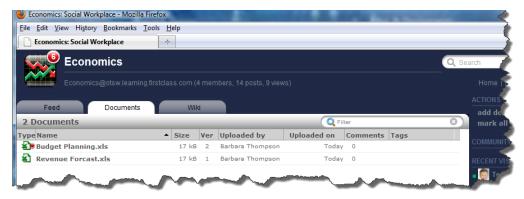
Communities don't just shield you from mail overload. Others who are interested in that same Policies community will also join it. They'll see everything you post, and you'll see all their responses plus everything they have posted.

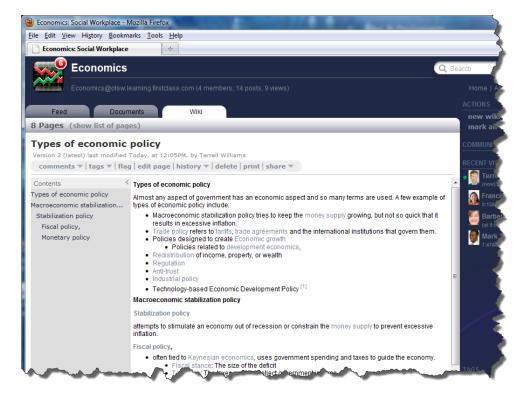


Sharing files

Communities aren't just common posting areas, though. You can also store files in a community. Others can download these files, perhaps to update them and then upload them back to the community.

If you'd rather work collaboratively on a document directly in the community, you can create wiki pages there, where everyone can see and update them. You can even add content from other web sites at the click of a button.



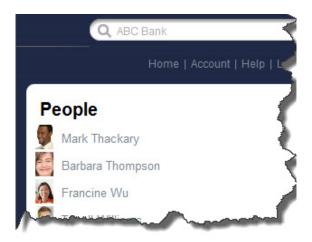


Finding others

So far, we've discussed what FirstClass Communities can do with "things". But you can't collaborate effectively without keeping track of people, and FirstClass Communities helps you do that, too.

Everyone in FirstClass Communities has a profile that includes information on their background, their picture, and even a personal blog. Say you're looking for someone in your organization who knows

Spanish. You just search on "Spanish" to get a list of everyone who has that word in their profile.

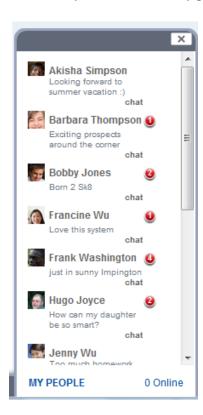


Keeping up

Staying in the loop in a busy organization is a challenge. FirstClass Communities provides tools for tracking activity, both for things and people.

You can flag a post, uploaded file, or wiki page. Every time something changes (for example, a post is replied to or a file is updated), FirstClass Communities tells you.

And you can create a buddy list of all the people whose activities you want to follow. Whenever they update their blogs, you know. This list also provides a convenient way to contact them by phone or email.



Mobile access

FirstClass Communities is available wherever you are, through mobile devices such as your iPhone, Blackberry or Android device.

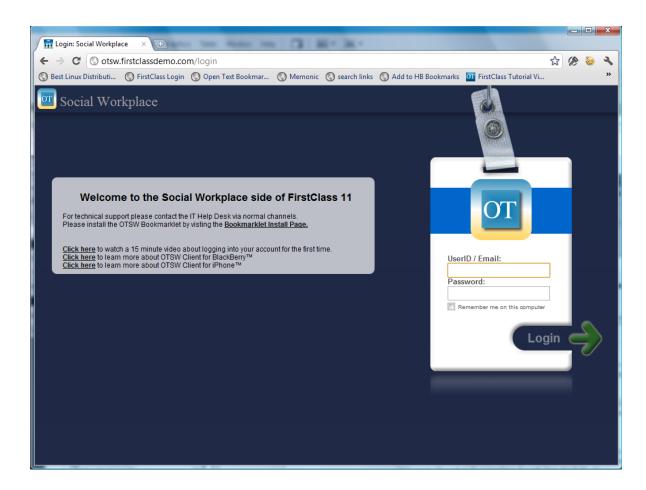


Accessing your FirstClass Communities Content

If you are a traditional FirstClass Client user as well as a FirstClass Communities user, you can access your content in two different ways.

Direct Login from the Web Login Page

You can log in via the Web interface directly by entering your FirstClass Communities URL in your web browser then enter your UserID and password in the login badge.



The second option is to

- 1. use the **Communities Button** on your launchbar while logged in with the FirstClass Client to open the browser and log you in to your Communities home screen or
- **2.** double-click on a Community to launch the browser and take you directly in to that community



Can't do everything described here?

Community creators control what actions are available to others in their communities. You may find, depending on the community, that you aren't allowed to do everything described in this help. If you want to discuss your permissions in a community, contact its creator or moderator.

An overview of your Communities home page

When you connect to FirstClass Communities, you see your Communities home page. This is the starting point for everything you can do in FirstClass Communities.



About those colored dots

A red dot indicates that a container (such as a community) contains items you haven't yet read. The number in the dot tells you how many unread items there are inside. Each unread item inside the container is also marked with a red dot. Selecting or scrolling past an item removes its red dot.



A green dot beside someone means they are currently online.



Profile information

Your profile picture (or a placeholder, if you haven't yet added a picture to your profile) is in the top left corner, followed by your name. Clicking your name opens your profile, which contains your personal and contact information, plus your blog.



Status message

Just under your name is a space for you to type a status message. This is a short one-liner intended to let others know what you're up to. You may want to tell them what you're currently working on, or that you're in the office today.

This message is shown with your mini profile (a popup available when you hover over someone), with your name when you appear in others' buddy lists, and in THE PULSE.

To post a status message, type it in the typing space, then click post.



About mini profiles

Hovering over a person's picture or name opens their mini profile, which is an extract of their full profile. From this mini profile you can:

- phone them, if you have an application that supports this click their phone number
- email them using your default email application click their email address
- follow (to add them to your buddy list) or stop following them click Follow or Stop following
- · chat with them online click Chat
- search for everything they have recently posted click **Recent** Activity
- open their full profile click their picture or name.

To close a mini profile, simply click elsewhere on the page.



THE PULSE



THE PULSE lists people's status messages and activities such as blog updates. To see everyone's Pulse entries, plus any comments on these entries, choose everyone from the view picker. To see just the entries of the people you are following, and entries to which they have responded, choose my people. To see just your own entries, choose me.

After you've clicked the view picker, you can use the arrow keys to scroll up and down through these choices. Press Enter/Return when the choice you want is displayed.

If an entry has a large number of comments, not all comments may be shown initially. To see the rest, click the link that indicates there are more replies.

Older entries may not be shown initially in the list. To see these entries, click Load More at the bottom of the list.

To comment on someone's entry, click it, then click reply. Type your comment, then click post.

To delete an entry that you created, click it, then click delete. To close the menu of actions, click the x button.

Note

Tip

If you are an external user (you normally connect to a different system, and are here because you were invited), you won't see THE PULSE.

COMMUNITIES

All the communities to which you belong. A community consists of people with a common interest, such as those working on a special project, or everyone in the same department. Communities allow members to discuss issues, store files of common interest, and add to communal wikis. To visit a community, click it.



To check out the most popular communities in your organization, click **discover** at the top right of the COMMUNITIES section. To see more communities, click more at the bottom of the list. From this list, you can visit communities or ask to be invited to them.



To remove a community from your home page, hover over it to display the x button, then click that button.



To create a community, click new at the top right of the COMMUNITIES section, then follow the instructions.



MY TAGS

A tag is a descriptive word or phrase that you assign to an object. For example, you may tag a post about vacation policies with the word "vacations". Tagging makes it easier to search for objects.

The tag list on your home page shows the tags that you have most recently assigned. The most frequently used tags are the biggest.



To search for everything that contains a tag, click it.

MY INVITATIONS

If you've been invited to join a community, you'll see the invitation here. If you want to see more information about the community, click More. If you click Accept, the community is opened and added to your home page.



MY FLAGGED ITEMS

This section lists everything that you are monitoring for changes. You may want to know, for example, when a post is replied to, or a file or wiki page is updated. A red dot means that object has changed. To go to a flagged object, click it.

To add an object to this list, select it, then click flag. To remove an object from this list, hover over it to display the x button, then click this button. Or open the object and click flag again.



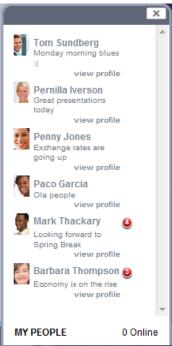
MY PEOPLE

MY PEOPLE lists everyone you have decided to follow because their activity particularly interests you.

To see this list, click the MY PEOPLE tab in the bottom right corner. The tab indicates how many in your people list are currently online.

Whenever anyone in this list updates their blog, or someone comments on their blog, a red dot displays beside their name.

To close this list, click the x button at the top.



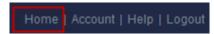
Search

FirstClass Communities pages include a search box in the top right corner. You can type words or phrases right in that box to search FirstClass Communities for all items, people, and communities that match your search term.



Home

Returns you to your home page from other FirstClass Communities pages.



Account

Lets you change your FirstClass Communities password and specify an email address for the receipt of automatically generated messages.



To change your FirstClass Communities password or specify an email address for the receipt of automatically generated messages, click the **Account** link at the top of the page.

Social Workplace will use the address that you type here to email you:

- · invitations to join communities
- · notifications of new activity on your flagged items
- copies of all posts to a community, if you have subscribed to the community.

This address doesn't have to be the same as the address you supplied in your profile. The profile address is just used as a link for others to click when they want to email you.



Help

Online version of the help information.



Logout

Disconnects you from Social Workplace.



Your Profile / Telling others about yourself

Your profile contains your picture, plus personal and contact information that gives others a snapshot of who you are and how to get in touch with you. You can also maintain a blog in your profile that gives even more information about your interests and experience. Blogs are discussed elsewhere in this help.



FirstClass Communities is all about people working together, so filling in your profile is key. In fact, until you've filled in all your profile information, FirstClass Communities will display a reminder on your home page.

To open your profile, click your name. You can also open others' profiles by clicking their names wherever you see them.

Can't open others' profiles?

If you are an external user (you normally connect to a different system, and are here because you were invited), you will only be able to open the profiles of other external users. In addition, you'll only see external users' pictures.

You are still encouraged to fill in your own profile, so others on this system will know who you are.

Supplying a profile picture

When you first connect to FirstClass Communities, you'll see a generic placeholder picture in the top left corner of your home screen. This is just here until you replace it with a picture of yourself.



You can use any picture on your computer that is in JPG format. You will be given the opportunity to crop the picture to remove unwanted elements. The picture will be automatically sized to fit the profile picture space.

To supply a profile picture:

- 1. Open your profile.
- **2.** Click the Change Picture button.
- **3.** Follow the instructions to upload, crop, and save your picture.





Supplying personal information

To supply the information that will tell others who you are and how to contact you:

- **1.** Open your profile.
- **2.** Click the Edit Profile button.
- **3.** Fill in the information on the Edit Profile panels.

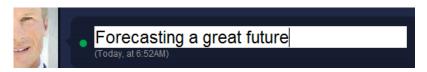


Your personal information is displayed under your picture in your profile. Everything except the words in your biography is presented as links. When you click one of these links, FirstClass Communities does a search on that term just as if you had typed it in the search box. And others viewing your profile can phone or email you by clicking that information.

The POSITION IN ORGANIZATION information is filled in automatically. When a group in this hierarchy is clicked, general information about group members is displayed if your organization has provided it.

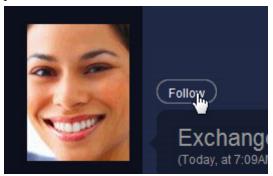
Updating your status message

Your current status message is displayed beside your picture in your profile. You can update this message by clicking it, typing your new message, then pressing Enter/Return.

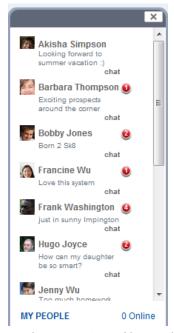


Following others

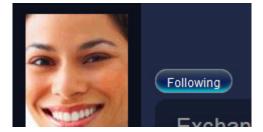
If you are looking at someone else's profile, you'll see a Follow button beside their picture.



To add this person to your people list, click this button. This list gives you immediate access to people right on your home page.

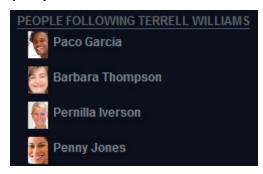


The next time you open this person's profile, you'll see that the button has changed to Stop following. You can click this button if you want to remove the person from your people list.



Seeing who is following you

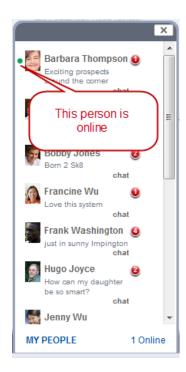
Everyone who is following you is listed under PEOPLE FOLLOWING, at the bottom of your profile information.



My People / Keeping track of others

About MY PEOPLE

The MY PEOPLE list on your home page is your personal buddy list. You can tell at a glance when anyone listed here is online, or has updated their blog. And you can phone, email, or chat with them from this list. To see this list, click the MY PEOPLE tab in the bottom right corner. The tab indicates how many in your people list are currently online.



This list shows everyone's profile picture, plus their latest status message. If their blog has been updated since you last looked at it, you'll see a red dot. If there are fewer than 10 unread updates, the number of updates is shown in the dot.

To go to someone's profile, click view profile. Hovering over this link opens the person's mini profile.



To chat with someone, click on the Chat link. This displays a chat tab for that person.





To close this list, click the x button at the top.

Adding someone to the list

To add someone to your people list:

- **1.** Find them listed somewhere in FirstClass Communities. You could search for their name or open a community that you know they have recently visited.
- **2.** Hover over their name to open their mini profile.
- 3. Click Follow.





Note

If you are an external user (you normally connect to a different system, and are here because you were invited), you can only follow other external users. By default, you are already following the person who invited you.

Removing someone from the list

To remove someone from your people list, open their mini profile or profile, then click Stop following.



Chatting Online

About chats

You can chat online with someone who is also currently connected. After you start a chat with someone, the comments made in that chat are always available. If you resume chatting with this person at a later date, you'll see the old chat comments automatically.

To chat with someone in your people list, click their name (see previous section). To chat with anyone else, open their mini profile, then click Chat.



This displays a chat tab at the bottom of the page. Clicking this tab opens a chat panel.



If you decide you don't want this tab displayed, click the x button on it to remove it.

If someone starts or resumes a chat with you, the chat panel opens automatically as soon as they send a comment.

Using the chat panel

A chat panel shows all the comments that have been made while chatting with this person, followed by a typing area for sending another comment.

To send a chat comment, type it, then press Enter/Return. Both you and the person you are chatting with will then see your comment added to any others above.

When you are ready to leave the chat, click the x at the bottom of the chat panel. You can also minimize the panel back to the chat tab by clicking the bottom of the panel.

Communities / Working together

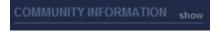
What is a community?

A FirstClass community supports a group of people who share a common interest. You may be part of a community that includes everyone in your department. Or everyone working on that special budget project. Or your skiing buddies. Communities let you take part in discussions and share information within these groups.



You can create your own communities to suit your needs. And others can also create communities and invite you to join.

You'll see all the communities to which you currently belong on your home page in the COMMUNITIES section. To visit a community, click it. If you want to see general information about a community while visiting it, click **show** beside COMMUNITY INFORMATION.



To remove a community from your home page, hover over it to display the x button, then click that button.



What you can do in a community

Within a community, you can:

- carry on discussions
- upload (post) files of interest to everyone in the community
- · create and update wikis
- check who belongs to the community, and when people last visited
- keep track of community activity when you aren't connected to FirstClass Communities.

Uploading files and working with wikis are described elsewhere in this document.

An overview of a community page

When you visit a community, you'll see:

1. The community icon, name, email address, and usage statistics

The email address tells you where to address any email that you want to send to this community. You can also click this address to open a preaddressed message in your mail application.

2. A Feed tab

This tab shows all community activity in chronological order. You can carry on discussions here, and FirstClass Communities also posts a link on this tab whenever a file is uploaded or a wiki page is created or updated.

3. Documents tab

This is the place to upload files for sharing with others in the community.

4. A Wiki tab

Contains all wiki pages created by community members to share information. Wiki pages are shared documents that community members can create and update right in FirstClass Communities.

5. ACTIONS

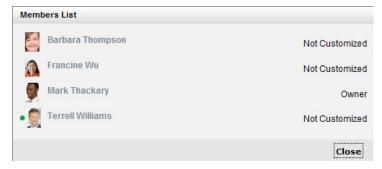
Lists general actions you can perform in this community. This menu changes depending on the tab you're on.

6. COMMUNITY INFORMATION

• To see the community type, who created it, member information, and a community description, **click show**.



To see a list of all community members, click show all. You will
also see the permissions level assigned to each member. Not
Customized simply means they have the default permissions level.
Permissions control what members can do in the community, and
are described at the end of this help.



• To see a list of just external members (people who normally connect to a different system, and are here because they were invited), click show external.

7. RECENT VISITORS

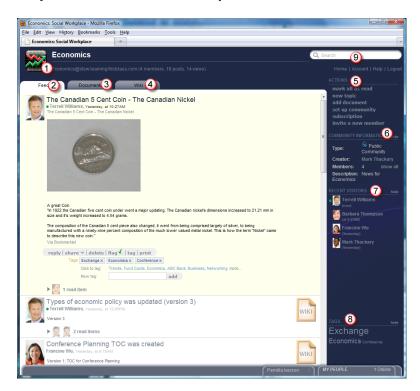
Lists everyone who has visited this community, plus the last time they visited. People are listed in date order, starting with the most recent visit. This list works like any other list of people in FirstClass Communities. You can hover to display a person's mini profile or click their name to open their full profile. To collapse this list, click hide. You can display the list again by clicking show.

8. TAGS

The tags used by members to describe objects in the community. These tags are displayed just like the ones on your home page, with the most recently assigned ones first, and the most frequently used the biggest. To search for everything that contains a tag term, click it. This is just like typing the term in the search box. Objects that are in this community are considered most relevant, and are listed first on the search results page. To collapse the tags section, click hide. You can display the section again by clicking show.

9. Search, Home, Account, Help, Logout

These act the same as they do on your home page. Search results will list objects that are in this community first.



Reading posts on the Feed tab

On the Feed tab, you'll see all topics and questions posted to the community, plus responses to these posts.

Each post is displayed with its responses under it in a discussion thread. Responses you have already read are collapsed, and each is represented by the picture of the response author. To open a read response, click the author's picture. To expand a collapsed thread, click the triangle to the left of it. To collapse an expanded thread, click the triangle again.



Tip

To move to the next post, press J. To move to the previous post, press K. Collapsed posts are skipped.

A post that is especially long is partially displayed, followed by a **more link.** To see the whole post, click that link. To shorten the post again, click **less**.

To make all red dots disappear at once, click **mark all as read** under ACTIONS. Or click the red dot on the closed community on your home page.

What you can do with posts

To work with a post, click it. As well as exposing any hidden content, this displays a menu of actions you can perform on the post:



То	Click This reply/	
• post a response		
	answer/	
	comment	

• post a response that quotes some text

quote

You must select the text you want to quote before you'll see this action.





• copy this post elsewhere





To email the post, choose **Email**.

To address the message to someone with a FirstClass Communities user name, type all or part of that name at **To**. Then click the name in the resulting list of matches.

To address the message to an email address, type it, then click **Add**. You can remove a recipient by clicking **Remove** beside them. The post title is used as the default message subject. You can change this subject. At **Message**, type any message text you want. **Attachments** just indicates that the post will be sent as an attachment to your message. If this post is a link to a file or wiki page, it's the file or wiki page that will be attached.



To post this in another community, choose **Post to Community**, choose the community, then click **Post**.



To display a web address that links to this post, choose **Permalink**. You can then copy and paste this address where you want.



To close the menu, click the **x** button beside **share**.

To Click This

· delete the post

delete

You'll only see this action if you are allowed to delete the post.

Warning

When a file is uploaded or a wiki page is created or updated, FirstClass Communities creates a post in the Feed list. If you delete that post, you are also deleting the actual file or wiki page.

• monitor this thread this post belongs to for any changes

flag

The post is added to MY FLAGGED ITEMS on your home page. Social Workplace also emails you notification of any new activity.



 add descriptive tag words or phrases for this post, to aid tag in finding it later

You can either choose from a list of tags that have already been used or type a new tag. You can assign multiple tags.

- To use an existing tag, click it at Click to tag. To add a new tag, type it at New tag, then click add. The tag is added to the tags area.
- To remove a tag, click the **X** beside it.
- To close the tagging section, click **tag** in the menu again. You'll see your tags displayed at the bottom of the post.



• display a printer-friendly version of this post, plus your operating system's standard print form.

prınt

If this is a link to a file or wiki page, you'll see the contents of that file or wiki page

Posting to a community

To create a post on a **new topic**, click new topic under ACTIONS. To respond to an existing post, click **reply**, **answer**, **comment**, or **quote** on the menu of actions for the selected post. A section opens for creating your post.

If this is a new topic, you'll see areas for giving the post a name, typing and formatting the content of your post, and assigning descriptive tags to it just as you would to an existing post. To give your post a name, type it at **Topic**.

If this is a response to an existing post, you'll just see an area for typing and formatting your response.

When you are ready to add content, click the content area. You can simply type plain text here. If you want to enlarge the visible typing space, you can collapse the edit toolbar at the top of the content area by clicking the **Collapse Toolbar** button to the right.



For more elaborate content, use the edit buttons. Hovering over these buttons displays tooltips that describe what the buttons do.



Keeping track of a community when you aren't connected

If you'd like to keep track of community activity when you aren't connected to FirstClass Communities, you can subscribe to the community. FirstClass Communities will then email you copies of items that are added to the community's Feed tab. You must supply an email address for this purpose.

To subscribe, click **subscription** under ACTIONS, then, under **Email Subscription**, select **Email me everything** to get a copy of everything added to the Feed tab or **Email me a Daily Digest** to get summaries of the previous day's activity.



To stop receiving these emails, click subscription again, then select None.

Joining communities

There are several ways to add communities to your home page. Some communities will simply be there because your FirstClass Communities custodian has added them. Other people may invite you to join their communities. And you may uncover communities on your own, and decide you want to join them.

If you're invited to join a community, you'll see the invitation under MY INVITATIONS on your home page. FirstClass Communities may also email you the invitation, so that you know about it even if you aren't connected at the time. On your home page, you can open a description

of the community by clicking **More**. Clicking **Accept** opens the community and adds it to your home page.



If you find a community that sounds interesting on the discover or search results page, you can click it to visit. If you decide you want to join, click **join this community** under ACTIONS to add it to your home page.

Limitations

You can't visit private communities. If you are interested in joining a private community, click Request Membership and follow the instructions to post a request to the community.

Some communities will let you read, but not post.

If you are an external user (you normally connect to a different system, and are here because you were invited), you won't see any communities beyond the ones you were invited to join, plus any default communities that are available to everyone.

Inviting others to join communities

You can invite people to join any communities that you created. You may also have been given permission to invite others by a community creator.

To invite someone to a community:

- **1.** Visit the community.
- 2. Click invite a new member under ACTIONS.
- **3.** Type the person's First Class Communities user name.

You can type part of a user name, then click Search to get a list of all matches. Click the name you want.



If the person you are inviting doesn't yet have a user account, you will be asked to provide an email address so that FirstClass Communities can create an account for them.



- **4.** Type a message that you want to accompany this invitation.
- **5.** Click invite.

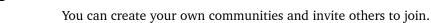
Everyone you invited (who has an email address in their account information) will receive an email inviting them to join, and if they are already part of your FirstClass system, they'll also see your invitation on their home pages. You'll see them in the RECENT VISITORS and (if they accept the invitation) members lists. If you invited people who aren't yet part of FirstClass Communities, you'll also see them in your people list.

Dealing with requests to join

If you see a request to join your community posted to the Feed tab, you can allow this person to join by clicking the request, then clicking accept request. This sends an invitation to the requestor.



Creating communities





Note

When deciding what to name your community, keep in mind that your organization may not allow the use of standard email characters such as @ in community names. If in doubt, check with your custodian about any restrictions on characters.

To create a community:

1. Click the new link at the top right of the COMMUNITIES area on your home page.



2. Fill in the first panel of the Create Community form.





Notes

The community description can be seen by others when you invite them, under COMMUNITY INFORMATION, and when they click about this community.

The type of community you choose controls how accessible it will be to others. Read the description of each community type carefully before selecting one.

- **3.** Click Create Community.
- **4.** Click an icon to represent your community on the second panel.



To accept the default icon, click the Skip this Step button.

After you close this form, your new community is added to your home page. You can now open this community to customize it and invite people to join.

To customize the look of your community, click set up community under ACTIONS, then click Edit.



The skin controls the appearance of your community (background, color, fonts). You can also change the community description here.



Managing community members

If you are the creator or moderator of a community, you can remove someone from the members list or change their permissions level.

To list the members, click show beside COMMUNITY INFORMATION, then click show all or show external.



To remove someone from the list, click remove member beside their entry.



To change someone's permissions level, choose the new permissions level.



Permissions control what each member can do in your community:

This Permission	Lets a member do this
0wner	everything
Moderator	everything except delete the community
Contributor	post, see members' permission levels but not change them, and see a description of the community but not edit or change the community appearance
Reader	read but not post, and see permission levels and community descriptions like a Contributor

If you are the creator of the community, you are automatically given Owner permission. You can't assign this permission to anyone else.

Documents / Sharing files

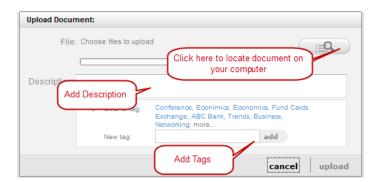
The Documents tab in a community stores uploaded (posted) files of all types that are of interest to the community. Everyone in the community can view these files, save them to their own computers, and update them.



To upload a file, click **add document** under ACTIONS. Click the button and select the file you want to upload.



You can type information about this file at **Description** and tag it as described below.



To change the **sort order** of the list of uploaded files, click the heading of the column on which you want to sort. Clicking the same column heading again reverses the sort order.

To list only documents with names that contain particular characters, type those characters in the **Filter** field. To list all documents again, click the \mathbf{x} button in this field.



What you can do with uploaded files

To work with an uploaded file, click it. This opens file details, such as the last modified date and who last modified the file. You'll also see a menu of actions you can perform on the file::



To Click this

• open a file or save a copy of it to your computer

open

If your browser can display this file type, the file opens. If you want to save a copy of it to your computer, use your browser's standard "save as" function. For files that your browser can't display, you are given the choice to open the file with an application that can display it or save the file to your computer (download it).

• upload a newer version of a file

update

You can add notes and tags for the new version.

edit an uploaded file without first downloading it

edit

By default, this action only works with Microsoft Office files such as Word or Excel, and doesn't work with all browsers. When you use this method to update a file, no one else can update it at the same time. If you want to edit files in other formats without downloading them, you'll need to map a drive on your computer. For instructions, contact your custodian

• list all versions of an uploaded file

history

From this list, you can select a version, then open or download it, or delete it if you have permission. To close the list, click the \mathbf{x} button beside **history**.



• list all comments that have been made about a file

comments

To add your own comment, type it in the space below Add a comment, then click post. To close the list, click the x button beside comments.



To Click this

• add descriptive tag words or phrases for this file, to aid in finding it later

tags

You can either choose from a list of tags that have already been used or type a new tag. You can assign multiple tags. To use an existing tag, click it at **Click to tag**. To add a new tag, type it at **New tag**, then click **add**. The tag is added to the tags area. To remove a tag, click the **x** beside it. To close the tagging section, click the **x** button beside **tags**.



• monitor a file for any changes

flag



The file is added to MY FLAGGED ITEMS on your home page. FirstClass Communities may also email you notification of any new activity.



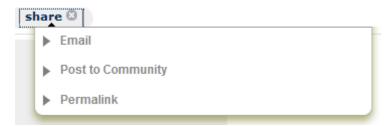
• delete a file, if you have permission

delete

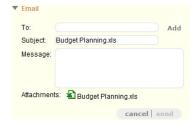
To Click this

• copy this file elsewhere





To email the file, choose **Email**. To address the message to someone with a FirstClass Communities user name, type all or part of that name at **To**. Then click the name in the resulting list of matches. To address the message to an email address, type it, then click **Add**. You can remove a recipient by clicking **Remove** beside them. The file name is used as the default message subject. You can change this subject. At **Message**, type any message text you want. **Attachments** just indicates that the file will be sent as an attachment to your message.



To put this in another community, choose **Post to Community**, choose the community, then click **Post**.



To display a web address that links to this file, choose **Permalink**. You can then copy and paste this address where you want.

To close the menu, click the x button beside share.



To go back to the list of uploaded files, click show **list of documents** at the top of the Documents tab.



The WebDav Plugin

In order to edit documents directly, your browser needs the WebDav plugin.

When attempting to edit a document for the first time on a Social Workplace server, you will be presented with the following dialog.



Follow the instructions provided by your browser to install the plugin and you will then be able to edit and update documents directly online.



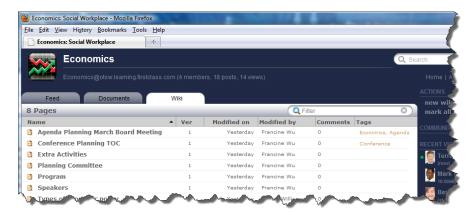
Once the plugin is installed, clicing on **Edit** will present you with another authentication dialog box.



Once you authenticate, your document will be opened and ready for editing. Saving the document will save it back to the community as a new version of the document.

WIKI / Sharing Information

The Wiki tab in a community stores wiki pages. These pages are shared documents that are created directly in FirstClass Communities. They can be viewed and updated by everyone in the community. Because of this, and the fact that only one person at a time can update them, they are an excellent way to create collaborative documentation.



To change the **sort order** of the list of pages, click the heading of the column on which you want to sort. Clicking the same column heading again reverses the sort order.

To list only pages with names that contain particular characters, type those characters in the **Filter** field. To list all pages again, click the \mathbf{x} button in this field.



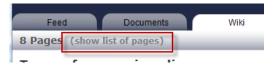
If an open page contains headings, you can click the **show page contents** arrow to the left of the page to open a list of all headings in the page.





Clicking one of these headings takes you to it in the page.

To return to the list of wiki pages from an open page, click **show list of pages..**



What you can do with wiki pages

When you open a wiki page, you'll also see a menu of actions you can perform on the page:



To Click this

list all comments that have been made about a page
 To add your own comment, type it in the space below Add a comment, then click post.

comments



To close the list, click the **x** button beside **comments**.

add descriptive tag words or phrases for this page, to aid in finding **tags** it later



You can either choose from a list of tags that have already been used or type a new tag. You can assign multiple tags. To use an existing tag, click it at **Click to tag**. To add a new tag, type it at **New tag**, then click **add**. The tag is added to the tags area. To remove a tag, click the **x** beside it. To close the tagging section, click the **x** button beside **tags**

• monitor a page for any changes

flag



The page is added to MY FLAGGED ITEMS on your home page.



FirstClass Communities may also email you notification of any new activity.

update a page

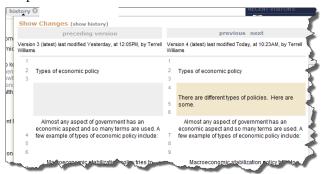
edit page

• list all versions of a page

history



From this list, you can select a version, then view it, display the differences between it and the preceding version (**show changes**), display the differences between it and the latest version (**compare to current**), or delete it if you have permission. When comparing versions, you can click **previous** or **next** to change the versions being compared.



To go back to the list of versions, click **show history**. To close the history, click the \mathbf{x} button beside **history**.

· delete a page, if you have permission

delete

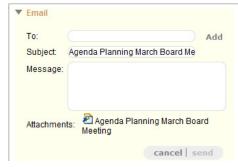
• display a printer-friendly version of this page, plus your operating **print** system's standard print form

copy this page elsewhere

share



To email the page, choose **Email**. To address the message to someone with a FirstClass user name, type all or part of that name at **To**. Then click the name in the resulting list of matches. To address the message to an email address, type it, then click **Add**. You can remove a recipient by clicking **Remove** beside them. The page name is used as the default message subject. You can change this subject. At **Message**, type any message text you want. **Attachments** just indicates that the page will be sent as an attachment to your message.



To put it in another community, choose **Post to Community**, choose the community, then click **Post**.



To display a web address that links to this page, choose **Permalink**. You can then copy and paste this address where you want.



To close the menu, click the **x** button beside **share**.

Creating wiki pages

To create a wiki page, click **new wiki page** under ACTIONS.



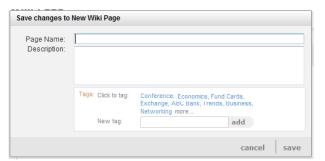
A blank page with an edit toolbar opens. Click this page to add content. You can simply type plain text here. If you want to expand the typing area, you can collapse the edit toolbar by clicking the **Collapse Toolbar** button to the right.



For more elaborate formatting, use the **edit buttons** in the toolbar. Hovering over these buttons will display tooltips that describe what the buttons do.



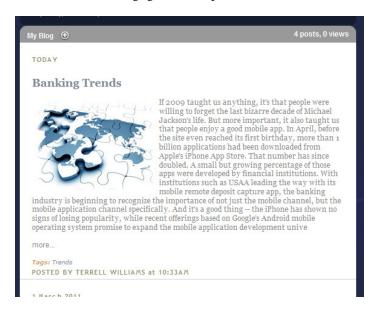
When you have completed your page content, click **save**. Name your page, supply any additional information at **Description**, and assign tags to it just as you would to an existing page. If you are updating an existing page, you'll see **Notes** in place of Description. Type any relevant information about your updates here. The information you type at Description or Notes will be dislayed beside the version number on the Feed tab.



If you decide you don't want to save your changes, click **cancel**, then click **cancel** again on the page. This will discard any changes you made to an existing page, or delete a newly created page.

Keeping a blog

A blog is a personal collection of dated entries in chronological order, like diary entries, that you create on any topics you want. Blogs are a good way to get detailed information about others' interests and skills. To see someone else's blog, go to their profile.



What you can do with blog entries

When you click a blog entry, a menu of actions is displayed:



To		Click this
•	comment on a blog entry	comment
•	post a response that quotes some text	quote
You must select the text you want to quote before you'll see this		
act	ion.	
•	update a blog entry	edit
This action is only available in your own blog.		
•	delete a blog entry	delete
Th	is action is only available in your own blog.	
•	monitor a blog entry for any changes	flag
	te∣flag 🗸 sh	

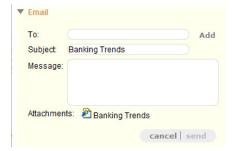
You'll see this for an original entry, not for any responses to it. The entry is added to MY FLAGGED ITEMS on your home page. FirstClass Communities may also email you notification of any new activity.

· copy this entry elsewhere

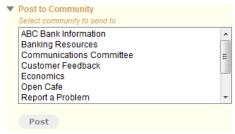
share



To email the entry, choose **Email**. To address the message to someone with a FirstClass user name, type all or part of that name at **To**. Then click the name in the resulting list of matches. To address the message to an email address, type it, then click **Add**. You can remove a recipient by clicking **Remove** beside them. The entry title is used as the default message subject. You can change this subject. At **Message**, type any message text you want. **Attachments** just indicates that the entry will be sent as an attachment to your message.



To put it in a community, choose **Post to Community**, choose the community, then click **Post**.



To display a web address that links to this entry, choose **Permalink**. You can then copy and paste this address where you want.



To close the menu, click the **x** button beside **share**.

• display a printer-friendly version of the entry

print

Creating blog entries

To create a blog entry, click the + button beside My Blog.



A section opens for creating your blog entry. This section has areas for giving the entry a name, entering the content, and tagging it. To give your entry a name, type it at **Title**

Adding content

To add your blog entry content, click the content area. You can simply type plain text here. If you want to expand the typing area, you can collapse the edit toolbar by clicking the **Collapse Toolbar** button to the right.



For more elaborate formatting, use the **edit buttons**. Hovering over these buttons displays tooltips that describe what the buttons do.



Tagging your blog entry

If you want to add descriptive tag words or phrases for this blog entry, to aid in finding it later, you can either choose from a list of tags that have already been used or type a new tag. You can assign multiple tags.

To use an existing tag, click it at **Click to tag**. To add a new tag, type it at **New tag**, then click **add**. The tag is added to the tags area.

To remove a tag, click the **x** beside it.



Searching FirstClass Communities

All FirstClass Communities pages include a search box in the top right corner. To search for a word or phrase, type it in the box, then press Enter/Return.

A search results page is displayed, divided into three sections:

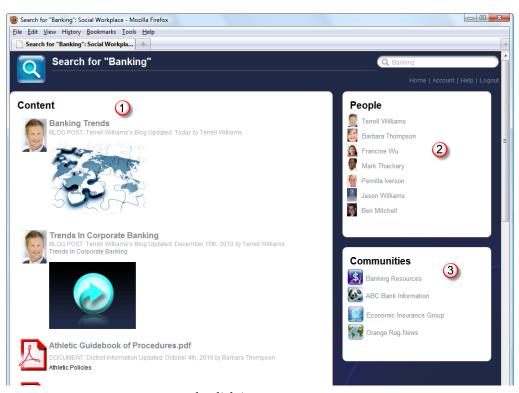
1. Content Objects, such as posts, that contain your search term.

Everyone who has contributed something that contains your search

2. People term, or has that term in their profile or blog.

All communities with objects that contain your search term or have

3. Communities that term in their community description.



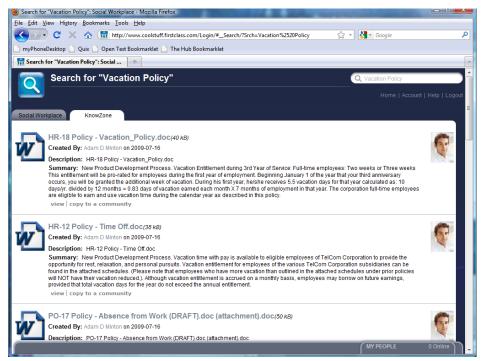
To go to a match, click it.

Content Server Integration

If you have a Content Server (Livelink) system

Your Social Workplace and Content Server (Livelink) search results are shown on separate tabs. The Livelink tab lists all records stored on your Content Server system that match your search.

The name on the tab will be the name that your system administrator has given to your Livelink installation..



For each document that is displayed in the search result, you have two options.

view copy to a community

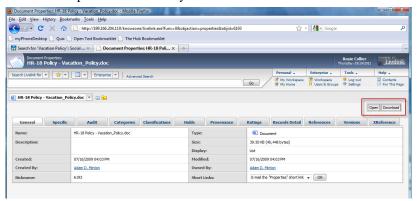
To Click this

• view a record view

You will be asked to enter your Livelink userid and password



Then you will be presented with the LiveLink screen where you will be able to open or download your selected document.



• create a file in Social Workplace that is a copy of the record in your Livelink system community

You will be asked where you want to store this file in Social Workplace. You can assign descriptive tags to it at the same time.



The copied document will be added to the Documents tab of the selected community.

The Bookmarklet / Sharing web content

Preparing to share web content

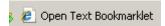
You can share information that is on other web sites with others in FirstClass Communities by using the **OpenText Bookmarklet** button on your browser's favorites/bookmarks toolbar. When you first connected to Social Workplace, you were given the option to add this button to the toolbar. If you didn't do that at the time, you can do it now.

First, make sure this toolbar is displayed in your browser. Depending on your browser, you may find the option to display this toolbar under a View menu. Check your browser's help if you can't find it.

Next, add the button to the toolbar by following the link in the help file or going to http://(your Social Workplace Server)/bkinstall.shtml



Once you have either added the button to your favorites or toolbar, you can now use it to add content to your Social Workplace blogs and communities.



Linking to another web page

You can use the **Open Text Bookmarklet** button from any web page to create a Social Workplace post or blog entry. The post/blog entry will contain a link to this page.

To do this:

- **1.** Go to the web page you want to link to.
- **2.** Click the Open Text Bookmarklet button.

If you aren't currently connected to Social Workplace, you are asked to log in.

3. Choose where you want to add this web page content.



You can also add comments to accompany this content.

Social Workplace puts a link to this page in a new post to your chosen community, or in a new blog entry.



Quoting part of the web page

If you want to quote some text from the web page in your comments, select that text before you click the **Open Text Bookmarklet** button.



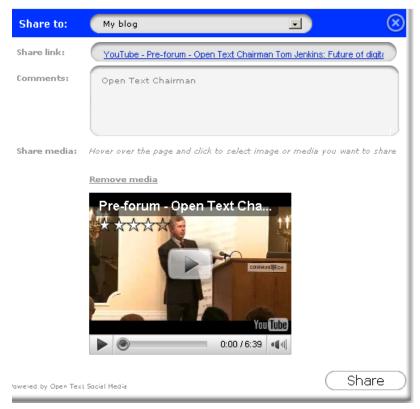
Including a picture from the web page

If you want your post or blog entry to include a picture from the web page, click the **Open Text Bookmarklet** button, then click the picture you want to include.



If the web page contains video or other rich media

If the primary content of the web page is a video, presentation, or other rich media, that content will automatically be added to your post/blog entry.



If you don't want this content to be included, click the **Remove Media** button.



Customizing your account



Change your Password or Email Address

To change your password or specify an email address for the receipt of automatically generated messages, click the **Account** link at the top of the page.

FirstClass Communities will use the address that you type here to email you:

- invitations to join communities
- · notifications of new activity on your flagged items
- copies of all posts to a community, if you have subscribed to the community.



This address doesn't have to be the same as the address you supplied in your profile. The profile address is just used as a link for others to click when they want to email you.

Working with the edit buttons

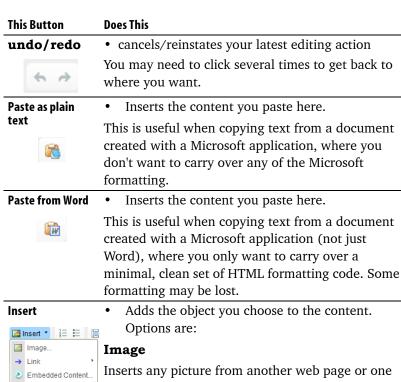
Table.

Smiley.

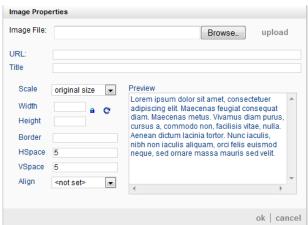
Horizontal Rule

You'll see edit buttons when you are adding content to a community post, wiki page, or blog entry.

The object you are editing determines which buttons you'll see.



Inserts any picture from another web page or one that is in a standard picture file format (like JPG or PNG) that your browser can display. When you choose this, the Image Properties form opens. Use this form to select the picture and control how it will look.



Does This

Insert Continued

To upload a picture file from your computer, click **Browse**, then select the file. The path to the file is displayed at **Image File**. Click **Upload**. A preview of the picture and its original size are displayed. The file is placed in a location where it's always available as long as the content is available, and this location is displayed at **URL**.

To use a picture from another web page, copy its location and paste it at URL. A preview of the picture and its original size are displayed after you move your cursor out of URL. Be aware that this type of link depends on the picture source not changing.

Anything you type at **Title** will be displayed in place of the picture for browsers not displaying pictures. Or it will be spoken for users of software for the visually impaired.

You can control the size of your picture using **Scale** or **Width** and **Height**. The last two are available if you choose **other size** at **Scale**, and let you set custom dimensions. For custom dimensions, the **Lock Ratio** icon lets you either lock or unlock the aspect ratio (when locked, the width and height are forced to stay at the original proportion), and the **Reset Size** icon returns the picture to its original size.



If your picture is especially large, it's automatically thumbnailed (displayed smaller) in posts to the Feed tab. People will be able to click it to see it full size. Thumbnailing only applies to pictures that you upload from your computer, not to pictures from another web page.

To put a border around your picture, type how thick you want your border, in pixels, at **Border**. To change the default five pixels of blank space around your picture, update **HSpace** (space to the left and right) and **VSpace** (space above and below).

By default, your picture will be inserted right where your cursor was positioned, even if this is in the middle of a line of text. To align your picture with the left margin, choose Left at **Align**. To align it with the right margin, choose Right.

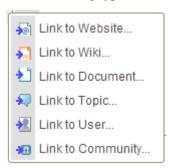
After you insert the picture, you can change its properties by right-clicking/Control-clicking and choosing **Image**. If you decide you don't want the picture after inserting it, you can click it and press Delete.

Does This

Insert Continued

Link

Inserts one of the following types of links:



- **Link to Website** type the address of the web page you want to link to at URL and the text that you want to act as the link at Link Text
- **Link to Wiki** choose the community where the wiki page is stored, then choose the wiki page
- **Link to Document** choose the community where the uploaded file is stored, then choose the file
- **Link to Topic** choose the community where the topic is stored, then choose the topic
- **Link to User** type the full or partial name of the user whose profile you want to link to at User name. For partial names, choose the user from the list of matches at Pick user.
- **Link to Community** type the full or partial name of the community to which you want to link at Community name. For partial names, choose the community from the list of matches at Pick community.

Embedded Content

Embeds content such as maps or movies from other web pages. To do this, copy the embed/link text from the web page (follow their instructions) and paste it here.

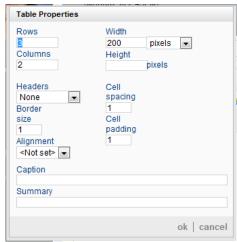


Does This

Insert Continued

Table

Inserts a table. Define your table in the Table Properties form.



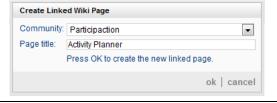
You can specify the table width as a fixed number of pixels or a percent of the total content width. If you provide a table height, this will override the default height that would be displayed by browsers.

Headers defines the specified cells as table headers. Cell spacing controls the space between cell borders and the content inside. Cell padding controls the space between cells. Border size controls the thickness of the border. Alignment controls table positioning. The table can be aligned with the left margin, aligned with the right margin, or centered. Caption is displayed as a heading over the table. Ignore Summary.

After you insert the table, you can change its properties by right-clicking/Control-clicking it and choosing **Table**. You can also use this menu to perform standard table operations like inserting rows and merging columns (select the columns first). Depending on your browser, you may also be able to drag the table's resizing handles to change its size.

Linked Wiki

Inserts a link to a wiki page that you create now in the chosen community. The page title is used as the default link text. You can add content to this new wiki page later.

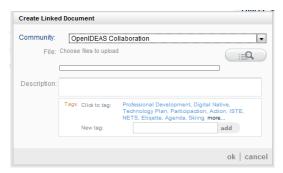


Does This

Insert Continued

Linked Document

Inserts a link to a file that you upload now to the chosen community. Click the button and select the file. You can add a description of the file and tag it. The file is uploaded when you click OK. The file name is used as the default link text.

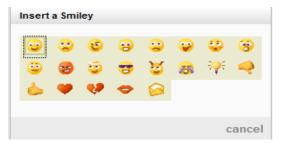


Horizontal Rule

Inserts a horizontal line.

Smiley

Opens a set of emoticons. Click the one you want to insert



Insert/Remove Numbered List



• Makes the selected paragraph numbered

The first paragraph that you make numbered starts with 1. When you press Enter/Return at the end of this paragraph, the next paragraph starts with 2. To remove number formatting from a selected paragraph, click this button again. Any numbered paragraphs that follow will then start again at 1.

Insert/Remove Bulleted List



- Makes the selected paragraph bulleted.
- When you press Enter/Return at the end of this paragraph, the next paragraph is also bulleted. To remove bullet formatting for a selected paragaph, click this button again.

Decrease Indent



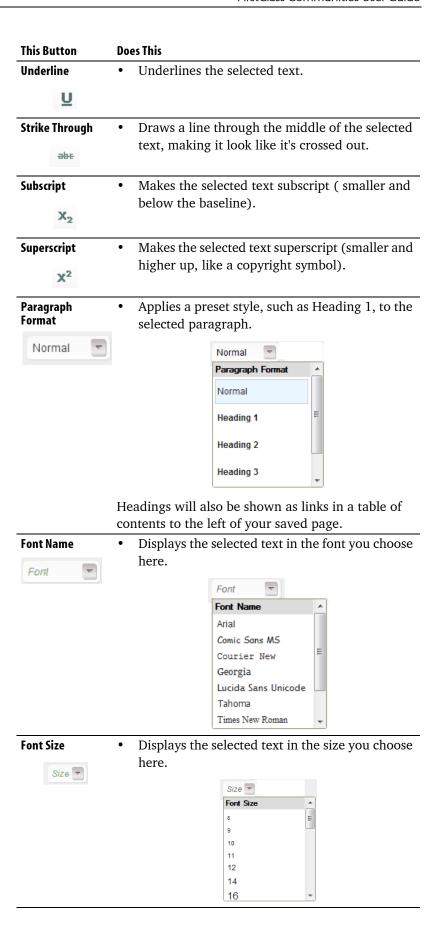
 Decreases the left margin of the selected paragraph

Increase Indent



Increases the left margin of the selected paragraph

This Button	Does This
Blockquote	Sets off the selected paragraph (or the
99	paragraph you are about to type) as a quote by indenting it.
	To remove the quotation formatting, click this again.
Left Justify	Aligns the selected paragraph with the left
	margin.
Center Justify	• Centers the selected paragraph between the
畫	margins
Right Justify	Aligns the selected paragraph with the right
畫	margin.
Block Justify	• Aligns the selected paragraph with both the left
	and right margins.
Select All	Selects all content
]_[
Remove Format	• Restores selected formatted text to the default.
Print	Opens your operating system's standard print
	form.
Preview	• Shows you, in a separate window, what this will
	look like when saved.
Source	• Shows your content with its behind-the-scenes
	HTML tags. To return to normal view, click this button again.
Maximize	• Shows content and edit toolbars only. To return
	to normal view, click this button again.
Show Blocks	Indicates separate block elements, such as
	paragraphs and tables. To return to normal view, click this button again.
Bold	Makes the selected text bold.
В	
Italic	Makes the selected text italic.
I	



Does This

Text Color

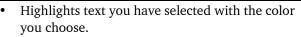
• Applies the color you choose to the selected text.





You can create a customized color by clicking **More Colors**.

Background Color •







As for text color, you can create a customized color.