Livelink Enterprise Server®

QuickStart for Users

This guide introduces novice and intermediate users to the basic features of Livelink.

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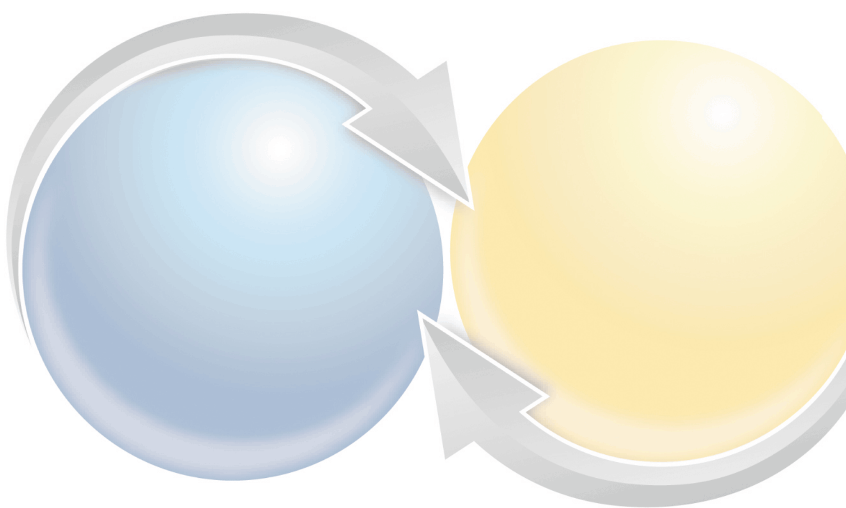

Great Minds Working Together™

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Typographical Conventions Used in This Guide

All information in the following table is case-sensitive unless otherwise noted.

Items	*Convention*
File names, directory names, folder names, path names, window names, dialog box names, Web page names, URLs, and e-mail addresses	These items appear in regular (normal) typeface. Some elements in *italic* indicate placeholders. Examples: • Run setup.exe to start the installation program. • Open the *Livelink_home*/config/opentext.ini file in a text editor. ***Note:*** The placeholder *Livelink_home* represents the Livelink root directory (directory where Livelink was installed). • Send an e-mail message to support@opentext.com to contact Open Text Customer Support. • In the Windows NT Control Panel, double-click the Services icon to open the Services dialog box.
Names of user interface elements, such as buttons, links, menus, check boxes, radio buttons, lists, and fields	These items appear in bold typeface. Examples: • On the **Tools** menu, click **Search**. • In the Services dialog box, click **Livelink Server : *service_name***, and then click the **Start** button. • Click the item's **Functions** icon, choose **Info**, and then choose **General**. • Click the **Admin Home** link.
Variable placeholders, references to other documents, new or special terminology, and emphasis	These items appear in *italic* typeface. Examples: • For more information, see the *Livelink First-Time Installation Guide*. • You can scan new documents for content of interest by saving your search criteria in a query called a *prospector*. • In your Web browser, go to the default Livelink start page at *protocol*://*host*:*port*/*URL_prefix*/livelink.exe, where *protocol* is http or https, *host* is the DNS name of the HTTP server host, *port* is the port number on which the HTTP server is listening, and *URL_prefix* is the prefix mapped to the Livelink_home/cgi directory in the HTTP server.

Items	*Convention*
References to chapters and sections of documents, and citations of messages displayed to users	These items appear in "quotation marks." Examples: • For more information, see Chapter Three, "Projects," in the *Livelink QuickStart for Users* guide. • For more information, see "Item Types" in Chapter Five, "Livelink Items." • For more information, see "Item Types," page 150. • If the import completes successfully, Oracle displays the message "Database import completed without errors."
Operating system commands, code examples, feature names, method names, object names, and text typed by users	These items appear in a monospaced font. Examples: • In the **User Name** field, type `Admin`. • At the operating system prompt, type `start-llserver`, and then press ENTER. • When searching for users, you can set the maximum number of users displayed per page by setting the value (default is 30) of the `MaxUsersToListPerPage` parameter in the `[general]` section of the `opentext.ini` file.
Key names	Key names appear in ALL CAPS. Examples: • Press ENTER to start a new line when typing in this field. • To select multiple items, hold down the CTRL key while you click the items that you want to select.

Chapter 1

Getting Started

Livelink is a Web-based application for storing, sharing, and distributing information. It provides a collaborative work environment that helps your organization manage documents and project information, improve business processes, and share information. It makes collaboration a part of every business process, even across organizational and geographic barriers. Livelink brings together employees across your organization, as well as partners and customers throughout your business community.

Livelink is designed to help you:

- Organize documents and other work items in a central, permission-controlled location
- Share, find, and keep track of information
- Revise documents and other information in a version-controlled environment
- Manage and simplify business processes by creating and using Workflows
- Communicate news and other information to other members of the organization
- Manage the work of project teams

Because Livelink is entirely Web-based, you need only a Web browser to use it. The powerful set of integrated features that make up Livelink gives you immediate access to all the information stored in the Livelink database, which is the central repository of your organization's accumulated knowledge.

This chapter provides information about how Livelink is organized and how it works. It covers the following topics:

- "About This Guide," page 2
- "Understanding the User Interface," page 4
- "Understanding Workspaces and Containers," page 5
- "Understanding Livelink Items," page 7
- "Understanding Groups," page 10
- "Understanding Permissions," page 11

About This Guide

This *QuickStart for Users* guide provides an introduction to Livelink for novice and intermediate users. Your first experiences with Livelink will most likely begin with orientation and instruction supplied by your organization. This guide, together with Livelink's extensive User Online Help system, is intended to supplement this training.

The information in this guide, which is taken largely from the *Livelink User Online Help*, begins by describing the fundamental concepts that you need to understand to begin using Livelink. Then, it describes and explains how to use many of Livelink's functions and features. For information about features or functions not covered in this guide, such as advanced searching, Categories and attributes, and Workflows, see the *Livelink User Online Help*.

Note: For additional information about using Workflows, see the *Livelink Workflow QuickStart Guide*.

Using Livelink Online Help

Livelink's extensive Online Help system explains how to use every feature and function in Livelink, and also describes in detail how they work and what they are designed to do. The Help has been designed to perform two primary functions:

- To help you accomplish a particular task quickly and efficiently
- To teach you about what you can do with Livelink, so that you can apply this knowledge to the work you do

Almost every page in Livelink includes a **Help** menu or a **Help** icon  . When you click either of these items, the Help displays in its own browser window, allowing you to obtain help without interrupting your work. The right pane of the Help window contains text; the left pane contains the Help system's Table of Contents.

There are three ways to use the Online Help:

- Use context-sensitive help
- Browse the Table of Contents
- Search (if enabled by the Livelink Administrator)

Note: The Help also includes a Glossary that defines commonly used Livelink terms. The Glossary is accessible from the Table of Contents.

Context-Sensitive Help

Choosing **For this Page** on the **Help** menu or clicking a **Help** icon  provides *context-sensitive help* (a Help page specifically for the Livelink page you are viewing). If you do not find the help you need on this help page, use the Table of Contents.

Table of Contents

Choosing **Contents** on the **Help** menu brings you to the "Using Livelink Online Help" page. The Help system's Table of Contents always appears in the left pane of the Help window. As you navigate through the Help system, the Table of Contents constantly updates itself. The Table of Contents highlights the name of the Help page you are viewing, and shows you what other Help topics are in the same location.

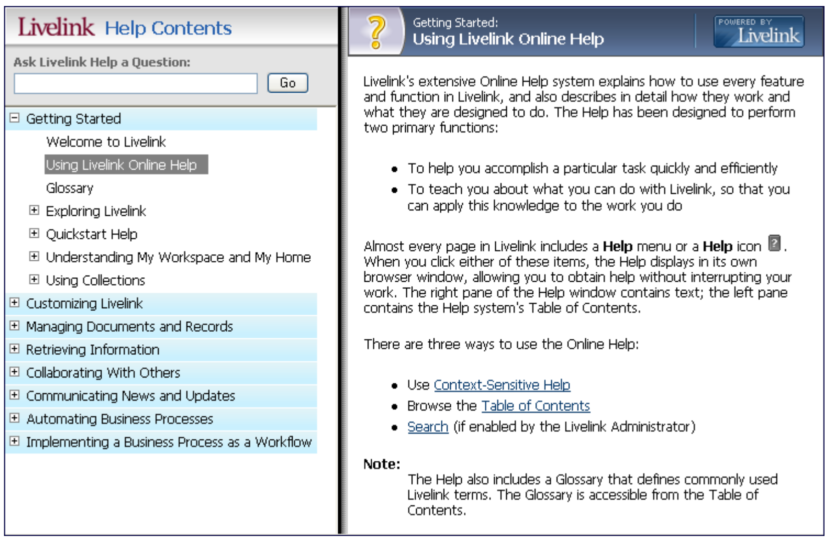


Figure 1-a: Livelink User Online Help Window

Search

Your Livelink Administrator may provide a text input field in the Table of Contents pane that you can use to search the Online Help for the particular information you need.

Understanding the User Interface

Livelink's user interface provides intuitive access to the system's features and functionality. Because your Livelink Administrator can modify the configuration of Livelink and set permissions to limit what you can see and do, Workspaces and navigational elements may not appear or behave as described here. If you use assistive technologies to work with Livelink, see "Using Assistive Technology and Java," page 20, for more information. For information about using the Livelink interface, see "Using Navigation and Function Controls," page 21.

Understanding Workspaces and Containers

One of Livelink's main purposes is to provide an environment that allows people to find, work with, save, and share information. The way you store items in Livelink in different places is similar to the way you organize the files on your computer in different directories. However, Livelink is more sophisticated in the way it handles information. It provides Workspaces and specialized containers that help manage information according to its type and purpose. In addition, Livelink provides a permissions structure that enables you to easily control who has access to information, based upon where it is stored.

Workspaces

You can think of Workspaces as *volumes* that divide Livelink into different operational areas. In an organization, some information is meant to be publicly shared, some is to be shared by a team, and some information is confidential. Workspaces are the basic functional compartments that store and organize information according to their intended audience. The three primary Workspaces in Livelink are the *Enterprise Workspace*, the *My Workspace*, and the *Project Workspace*. Each Workspace has unique tools and characteristics, but their behavior, navigation methods, and appearance are basically the same.

The Enterprise Workspace

The Enterprise Workspace is the "public forum" in Livelink. It is used to store information and items that are intended for all users in your organization to see and work with. Although all users typically have the ability to see the items in the Enterprise Workspace, only a select number receive permission to add, delete, or modify items there.

Note: Permissions control your access to everything in Livelink. For more information about permissions, see "Understanding Permissions," page 11.

The My Workspace

Every user in Livelink has a private storage area in Livelink, called My Workspace. You have full permissions on your My Workspace. For more information about the My Workspace, see "Using My Home and My Workspace," page 32.

The Project Workspace

Projects are unique in the sense that they are added to Livelink like an item, but each one functions as a discrete Workspace. Every Project added to Livelink receives its own Workspace, which is accessible only to users who are assigned to participate in it. For more information about the Project Workspace, see Chapter 10: "Working with Projects".

Note: Another unique aspect of Projects is that they have their own permissions model. For more information, see "Permission Types," page 11.

Containers

Containers are items that organize the information stored in Livelink in a systematic way. The most common container type, because it can store almost any type of item, is the Folder. Other containers, such as Discussions and Compound Documents, can store only certain kinds of items. Different containers have different characteristics and unique functions. For more information about containers and other item types, see "Understanding Livelink Items," page 7.

Note: Workspaces and containers are sometimes collectively referred to as *locations*.

Browse Views

In Workspaces, Folders, and Compound Documents, you can choose from three different browse views to change the way items are presented. For more information, see "Multiple Browse Views," page 23.

Understanding Livelink Items

Livelink enhances knowledge management by providing you with many different types of work items. The information you can store in Livelink comes in many forms, and the different item types support different kinds of information. Most item types, such as Documents and News, represent a particular kind of information. Other items are *containers*, *reference items*, and *Item Templates*.

The following tables describe the most commonly used item types in Livelink and their purpose. Depending on a number of factors, such as your permissions, privileges, optional modules, and any customizations made by your Livelink Administrator, the item types available to you in different places (or throughout Livelink) may differ.

Table 1-1: Container Items

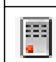
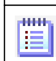
Icon	**Name**	**Description**
	Folder	A container that stores other items. Folders can contain almost all types of items. A Folder inside another Folder is known as a *Subfolder*.
	Compound Document	A container that stores multiple Documents (such as chapters of a book) in sequential order. Compound Documents can contain only Documents, Shortcuts, Generations, and other Compound Documents.
	Channel	A container for storing and publishing News items.
	Project	A work environment for teams who are collaborating on a common goal.
	Discussion	A container that holds collections of Topics and Replies by which users exchange information about a common subject.
	Task List	A container that stores and organizes Tasks.
	Task Group	A container within a Task List used to organize large groups of related Tasks.
	Category	A container for storing and organizing attributes. For information about Categories and attributes, see the “Retrieving Information” section of the *Livelink User Online Help*.

Table 1-2: Reference Items

Icon	**Name**	**Description**
	Shortcut	A pointer to an item elsewhere in Livelink.
	URL	An address of an external Web page. Although you can use a URL to link to another Livelink item, it is preferable to use a Shortcut.

Table 1-2: Reference Items

Icon	Name	Description
	Generation	A pointer to a particular Version of an item (usually a previous Version).
	Release	A special kind of Version for a Compound Document. A Release is a read-only “snapshot” of a Compound Document (and all its contents) at a particular point in time.
	Revision	A special kind of Version for a Compound Document. A Revision is a read-only “snapshot” of a Compound Document (and all its contents) at a particular point in time. A Revision is similar to a Release, but is suitable when you want to preserve only minor modifications to a Compound Document and do not need to create a new Release.

Table 1-3: General Items

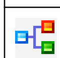
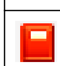
Icon	Name	Description
	Document	A Document of undetermined type. By default, Livelink recognizes many file types, including Microsoft® Word files, Microsoft® Excel spreadsheets, and HTML documents.
	Text Document	A document file in plain text format.
	News	A News item added to a Channel that can be “broadcast” in a News Player. News is made up of a headline and a story.
	Topic	The beginning of a thread in a Discussion.
	Reply	The continuation of a thread in a Discussion.
	Task	A work assignment issued to a user or group.
	Milestone	A marker used to associate a Task with a particular stage of a Project or date.
	Workflow Map	A graphical depiction of a structured work process.
	Poll	An item that enables Livelink users to vote on specific issues.
	LiveReport	A direct query run against the Livelink database that reports statistics and other information about the database and the items in it. For information about LiveReports, see the “Retrieving Information” section of the *Livelink User Online Help*.
	Search Query	A stored set of search criteria that can be reexecuted.

Table 1-3: General Items

Icon	Name	Description
	Snapshot	A stored set of Search Results. Displaying the Snapshot does not reexecute the Search that produced it.
	Version	A previous version of a Document, Workflow Map, or other versionable item type that is maintained by Livelink.

Table 1-4: Template Items

Icon	Name	Description
[no icon]	Search Template	A configuration of the Livelink Search page that you create and save. It allows you to reuse a particular configuration of the Search page without having to create it each time.
	Project Template	An item that contains a preconfigured object hierarchy and content that you can use as the basis for a new Project that you create.

Understanding Groups

Every user in Livelink is a member of at least one group and may be a member of many groups. Groups can also contain other groups (a group within a group is known as a *subgroup*). The principal group of which you are a member is called your *Department*. Normally, your Department corresponds to the department you belong to in your organization, for example, Sales or Product Development.

The main purposes of creating users and groups are:

- To grant system privileges, such as a user's ability to log in, the types of items the user can create, and the privilege to create other users and groups.
- To control access permissions, defining whether the user or group can see or modify a given item.
- To assign work through Workflow steps and Tasks.
- To set up default notification for new users.

Organizing users into groups also simplifies the administration of access control and work processes because specific changes can be applied to many users at a time.

When Livelink is first installed, there is only one user, *Admin*, and one group, *DefaultGroup*, in the system. The Livelink Administrator creates all other users and groups. *Admin* is a user account created for the Livelink Administrator. This user has full access and privileges in the system and cannot be deleted from Livelink. *DefaultGroup* is created by default when Livelink is installed, and it also cannot be deleted. The Admin user belongs to this group by default. Any user account that is not assigned to a specific group when created is automatically assigned to DefaultGroup.

For more information about users and groups, see Chapter 6: "Working with Users and Groups".

Understanding Permissions

One of the most fundamental and important tasks in Livelink is controlling access to the information it contains, a task known as access control. In Livelink, your access to items and locations in the system are defined by permissions, which are simply the rules that determine what you can see and do in the system. By defining appropriate permissions for your Livelink user population, your organization can effectively manage the security of information stored in the Livelink database.

Access control is so essential to Livelink that it even defines what you see in the Livelink interface. For example:

- If you do not have permission to see an item, the item is hidden from you when you open a location or view a Search Results page.
- If you do not have permission to add items to a location, the **Add Item** menu does not appear when you open that location.
- Only the functions that you have permission to perform appear on an item's **Functions** menu.

For every item stored in Livelink, the system maintains an *Access Control List* (ACL). Basically, an ACL is a list of all users and groups that have access to the item and what actions they are permitted to perform on it. Your permissions, as defined by an item's ACL, determine whether you can see and open the item, whether you can modify or delete it, and whether you can change the permissions on it.

For detailed information about working with permissions, see "Managing Permissions," page 59.

In addition to permissions, your ability to see and do things in Livelink depends on your *system privileges*. While permissions operate on an item-by-item basis, privileges operate on a system-wide basis. Privileges include the ability to log in to the system, to add or modify users and groups, or to perform system administration functions. For more information, see "Working with Users," page 107.

Permission Types

There are three distinct but related types of permissions in Livelink:

- Work Item permissions, which apply to Channels, Discussions, and Task Lists.
- Document-Management permissions, which apply to most Livelink item types.
- Role-Based permissions, which apply to Projects.

Because different item types are governed by different permission types, permissions sometimes cannot transfer precisely when items are moved or copied. In such cases, Livelink must *map* (translate) permissions from one type to another. For more information, see "Permissions Mapping," page 14.

For detailed information about working with permissions, see "Managing Permissions," page 59.

Work Item Permissions

Work Item permissions apply to Channels, News items, Discussions, Topics and Replies, and Task Lists and Tasks. These item types do not have permissions of their own. They have only the permissions that they inherit from the container in which they reside:

- News can only be added to Channels.
- Topics and Replies can only be added to Discussions.
- Tasks can only be added to Task Lists.

The following table describes the four Work Item Permissions.

Table 1-5: Work Item Permissions

Permission	*With this permission . . .*
None	You cannot view the item.
Read	You can view the item.
Write	You can view and edit the item.
Administer	You have full access to the item, including read, write, and delete capabilities. You can also edit the item's permissions.

Work Item permissions are *inclusive*. That is, if you have the Administer permission, you also have the Read and Write permissions.

Permissions for Task Lists

Permissions for Task Lists behave in a slightly different manner than for Channels or Discussions because they involve both the creator of the Task and its *assignee* (the user to whom the Task is assigned):

- If you have the Administer permission on a Task List, you also have full permissions on the Tasks it contains.
- You also have full permissions on a Task if you created the Task and have Write permission on the Task List. (The Write permission on a Task List gives you permission to modify information for any Tasks it contains.)
- You have partial permissions on a Task if you have Write permission on the Task List and are the Task's assignee. This means that you can modify only the **Comments** and **Status** fields of that particular Task. You must have Write permission on a Task List before you can be assigned a Task within it.

Document Management Permissions

Document Management permissions apply to most items in Livelink, including Documents, Folders, and LiveReports. These permissions are more detailed than Work Item permissions and provide more precise control over the operations performed on items.

The following table describes the nine Document Management permissions.

Table 1-6: Document Management Permissions

Permission	*With this permission . . .*
See	You can see an item in its container but cannot open it.
See Contents	You can open the item and see its contents.
Modify	You can rename the item and modify some of its properties. (For container items, such as Folders, this includes the properties that are listed on the item's **Presentation** Properties tab.)
Edit Attributes	You can apply Categories to an item or modify an item's Categories or the attributes they contain.
Add Items	You can add items to the item. This permission is only available for container items.
Reserve	You can reserve the item (to prevent other users from modifying it), modify it, and then unreserve the item. You can also add Versions to items you unreserve. This permission is only available for items that can be reserved.
Delete Versions	You can delete Versions of the item. The Delete Versions permission is only available for items that have Versions, such as Documents and Workflow Maps.
Delete	You can delete the item.
Edit Permissions	You can edit the permissions that other users or groups have on the item.

All permissions are nested within the See permission. This means that, for example, you cannot modify or delete an item that you cannot see.

Note: The Delete Versions and Reserve permissions do not apply directly to Folders or Compound Documents. These permissions are available in the permissions set for Folders and Compound Documents primarily so that you can specify default permissions for items that are added to the Folder or Compound Document.

When you grant a permission, Livelink verifies that the base set of dependent permissions required for that permission are also selected. For example, as shown in Figure 1-b, on page 14, if you select the **Edit Permissions** check box when no other check boxes are selected, Livelink automatically selects all the other check boxes and grants full permissions on the item.

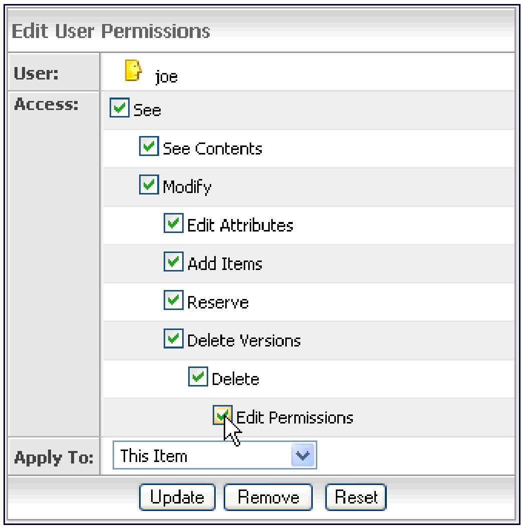


Figure 1-b: Edit User Permissions Page for a Document

Role-Based Permissions

Projects simplify the management of permissions by providing a role-based permissions model. When you create a Project, Livelink automatically creates a Coordinator, Member, and Guest group for the Project. Each group is assigned a Project role and therefore receives a different level of permissions. For information about role-based permissions, see "Understanding Project Role Permissions," page 136.

Permissions Mapping

Because different item types are governed by different permission types, permissions sometimes cannot transfer precisely when items are added, moved, or copied. For example, when you add or move a Channel (which is governed by Work Item permissions) to a Folder (which is governed by Document Management permissions), Livelink must *map* the Folder's permissions to the nearest corresponding permissions for a Channel.

The following tables describe how the different permission types map to each other.

Table 1-7: Work Item Permissions Mapping

Work Item Permission	Document Management Permission
None	No permissions
Read	See, See Contents
Write	See, See Contents, Modify, Edit Attributes, Add Items
Administer	See, See Contents, Modify, Edit Permissions, Edit Attributes, Add Items, Delete

Table 1-8: Role-Based Permissions Mapping

Role-Based Permission	*Document Management Permission*
Guest	See, See Contents
Member	See, See Contents, Modify, Edit Attributes, Add Items, Delete Versions, Reserve
Coordinator	See, See Contents, Modify, Edit Permissions, Edit Attributes, Add Items, Delete Versions, Delete, Reserve

Note: Mapping permissions can affect the permissions of the existing users and groups in an item's access list. For example, if you have the See, See Contents, and Add Items permission on a Folder, and a Project is added to that Folder, you automatically become a member of the Project. In addition to your original permissions, you receive permission to reserve, modify, edit attributes, and delete Versions of the items in the Project.

Chapter 2

Working with Livelink

Working with Livelink has much in common with using a Web site or other software application. Many of Livelink's basic functions may therefore be familiar to you. This section describes some of Livelink's most basic operations and how to perform them.

This chapter covers the following topics:

Accessing Livelink

You access Livelink using a Web browser, such as Netscape Navigator® or Microsoft® Internet Explorer. Accessing Livelink is similar to visiting any other Web site. Every page in Livelink has hyperlinks that allow you to look for the information that you need. When you are ready to begin using Livelink, your Livelink Administrator will supply you with the following:

- The URL for accessing the Livelink system
- The user name and password for your Livelink system

Note: You may also receive a third element for when you log in, a Domain name. A Domain defines a secure Workspace for a group of users within a larger Livelink system. The display name for the domain field varies, but often will say Domain, Company, or something similar.

Figure 2-a: The User Log-in Page

Passwords are case sensitive and consist of letters, numbers, and special characters. Forward slashes (/) are not permitted. Your Livelink Administrator may set additional restrictions on your password, such as requiring that all passwords include at least one digit. You can change your password at any time. If you forget your password, contact your Livelink Administrator. For more information about changing your password, see “Changing Your Password Settings,” page 28.

Tip: You can create a *bookmark* (or *favorite*) for the URL in your Web browser so that you can easily return to Livelink.

Logging In and Out

Your Livelink user account does the following:

- Determines the privileges and permissions you have within the system
- Gives you access to your personal work area in Livelink

- Presents you with the Tasks assigned to you
- Tracks information for auditing purposes

Logging In to Livelink

To log in to Livelink:

1. Type the Livelink URL in your Web browser's address field.
2. On the User Log-in page, type your log in ID in the **Username** field.
3. Type your password in the **Password** field.
4. Click the **Log-in** button.

Note: Your password is case sensitive; enter it exactly as it was given to you.

Tip: Logging out of Livelink every time you finish working prevents unauthorized users from accessing your information. Closing your Web browser automatically logs you out of Livelink.

Logging Out of Livelink

To log out of Livelink:

- Choose **Log-out** on the **Tools** menu, and then click the **Log-out** button.

Using Assistive Technology and Java

To ensure its compliance with accessibility standards, Livelink has been tested with a variety of assistive technologies, such as screen-reading software for the visually impaired. Many assistive technologies, however, do not effectively support *Java applets* (applications written in the Java programming language). If you use assistive technologies to work with Livelink, you should be aware of the following issues:

- If you use a screen reader, it may not be able to read the text from a Java applet.
- If you are unable to use a mouse or other pointing device and, therefore, rely on keyboard commands to operate your computer, you may not be able to use a Java applet effectively.

The major Livelink features that employ Java are the Workflow Painter, the Text Editor, and the Spell Check utility. Certain other situations may also prevent you from using the Java applets. For more information, contact your Livelink Administrator.

Using Enhanced Keyboard Accessibility Mode

If permitted by your Livelink Administrator, you can adjust your personal settings to use Enhanced Keyboard Accessibility Mode. This setting lets you work with Livelink using keyboard commands, and disables its Java-dependent features. If you do not see this setting on the General Settings page, your system may be set to require Enhanced Keyboard Accessibility Mode for all users. For more information, see “Changing Your General Settings,” page 27.

Navigating and using Livelink with keyboard commands involves using the TAB and ENTER keys as described in the following table.

Table 2-1: Keyboard Accessibility Commands

Keystroke	*Action*
TAB	Moves sequentially through buttons, links, and other user-interface elements from left to right and top to bottom. Within a menu, moves from top to bottom. SHIFT + TAB reverses direction.
ENTER	Works like a mouse click to activate buttons and links, and to open menus. Also opens submenus, such as the **Properties** submenu on the **Functions** menu.

Using Navigation and Function Controls

Livelink's user interface provides intuitive access to the system's features and functionality. This section explains the basic controls that you use to access different areas of the Livelink system and work with items.

Notes: Because your Livelink Administrator can modify the configuration of Livelink and set permissions to limit what you can see and do, Workspaces and navigational elements may not appear or behave as described here.

If you use assistive technologies to work with Livelink, see "Using Assistive Technology and Java," page 20, for more information.

Navigational User Interface Elements

Figure 2-b: Navigation Elements

- **Global Menus**, which appear on almost every page in Livelink. Certain Workspaces, such as a Project or Task List Workspace, have their own Global Menus. By default, the following four menus always appear:
  - **Personal**, which allows you to access your My Home, My Workspace, and personal report pages.
  - **Enterprise**, which allows you to access the Enterprise Workspace and the Users and Groups page.
  - **Tools**, which allows you to search Livelink, log out, or modify your Livelink settings.
  - **Help**, which allows you to access Livelink's *context-sensitive help* (help for individual pages) and the Table of Contents for all Livelink Online Help. You can also view the About Livelink page and send feedback to the Livelink Administrator via e-mail.
- **Quick Links**, which are hyperlinks that act as Shortcuts. Each Global Menu can have two Shortcuts, which appear directly below each menu.

- **Navigation Menu**, which allows you to navigate up and down levels in the Livelink system. The default navigation option, as shown in Figure 2-b, on page 21, is the drop-down list. However, your Livelink Administrator can change the navigation style, or enable users to specify their preferred navigation style. The other navigation style available is the Hyperlink Trail, which shows you the system path to an item in a horizontal sequence. The trail includes item names, associated images, and a **Functions** icon. You can navigate to higher levels by clicking a link in the trail.
- **Featured Items**, which are items that are made to stand out in a separate section. In a Project Workspace, any Sub-Projects appear as featured items in the Sub-Projects section. For more information about classifying items as featured, see “Customizing Workspaces and Containers,” page 30.

Functional User Interface Elements

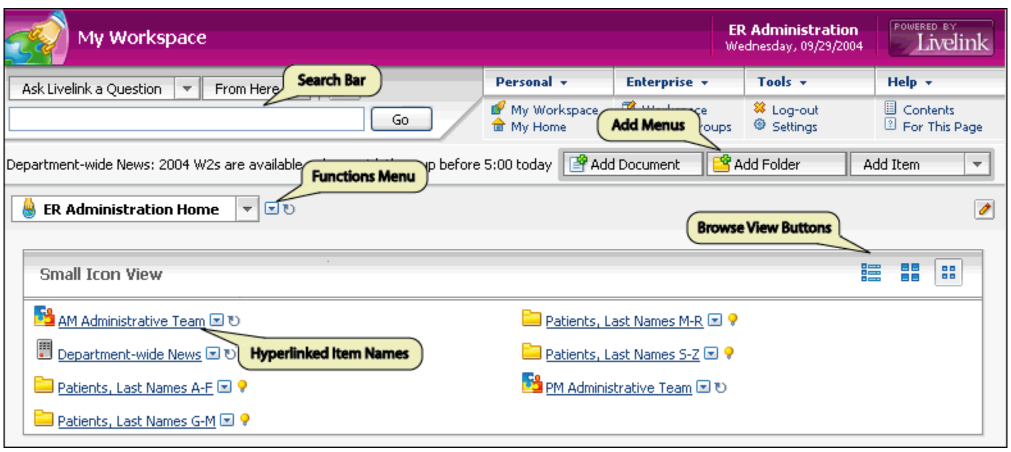


Figure 2-c: Function Elements

- **Search Bar**, which allows you to search for items anywhere in Livelink. For more information about finding information, see “Searching Livelink,” page 63.
- **Functions Menu**, which appears beside most items in Livelink. This menu contains all the functions that you are allowed to perform on that item, based on your permissions and other conditions. This menu is also referred to as the **Functions** icon.
- **Hyperlinked Item Names**, which enables you to open a Livelink item by clicking its link. Most item names in Livelink are hyperlinked.
- **Add Menus**, which appear in every Workspace or container where you have the Add Items permission. You can add items to all Livelink items using the **Add Item** menu. You can also add Documents and Folders using the **Add Document** and **Add Folder** buttons.
- **Browse View Buttons**, which enable you to change the way items appear inside a Workspace or container. For more information about the available browse views, see “Multiple Browse Views,” page 23.

Additional User Interface Elements in Detail View

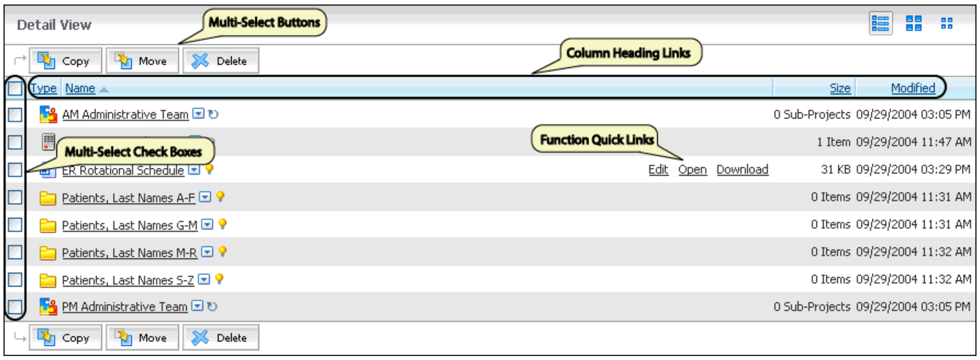


Figure 2-d: Additional Detail View Elements

- **Copy, Move, and Delete Buttons**, which enable you to copy, move, or delete multiple items at one time. These buttons are used in conjunction with the multi-select check boxes.
- **Multiselect Check Boxes**, which enable you to select the items you want to move, copy, or delete.
- **Column Heading Links**, which enable you to sort items according to the column heading. For most Livelink items, the column heading includes the item type, name, size, and modified date.
- **Function Quick Links**, which allow you to quickly open, edit, or download a Document.

Multiple Browse Views

In Workspaces, Folders, and Compound Documents, you can choose from three different browse views to change the way items are presented. You modify the view for individual pages by clicking one of the following buttons:

- **Detail View** , displays icons in a list and includes additional information such as an item’s name, size, and modified date (which you can sort by clicking the appropriate column headings). When you are in Detail View, you can copy, move, and delete multiple items, and show item descriptions.

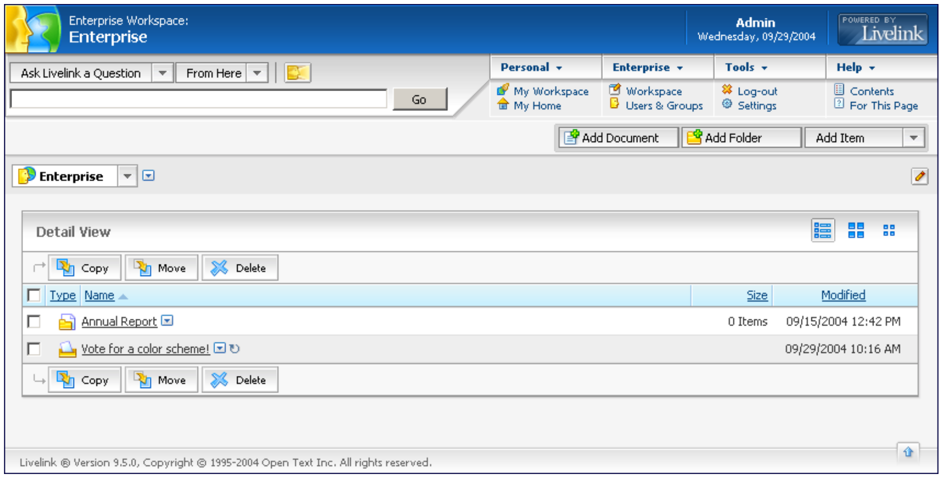


Figure 2-e: Detail Browse View

Tip: Detail View is the system default. However, you can change the default view for all of Livelink on the My General Settings page. For more information, see "Changing Your General Settings," page 27.

- **Large Icon View** , displays large icons in four columns. The item's name appears under its icon with the **Functions** icon, and if applicable, the **New** and **Modified** icons.

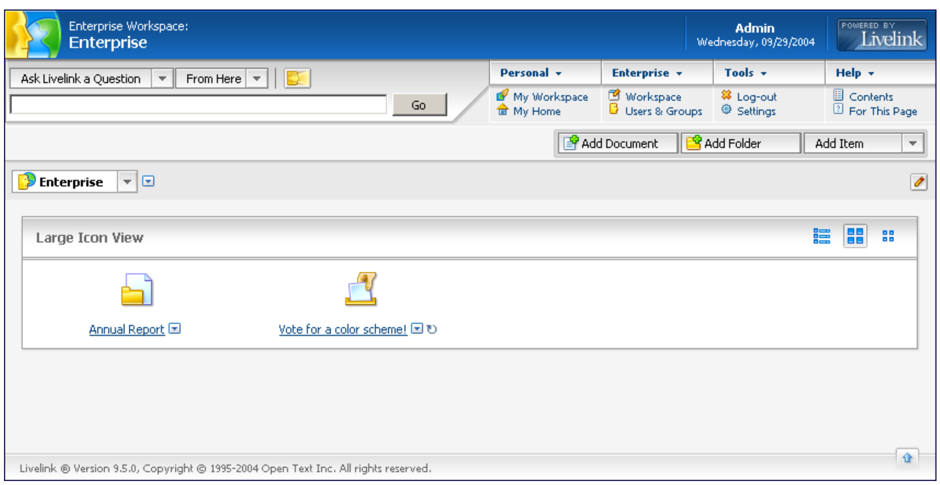


Figure 2-f: Large Icon Browse View

- **Small Icon View** , displays small icons in two columns. The item's name appears under its icon with the **Functions** icon, and if applicable, the **New** and **Modified** icons.

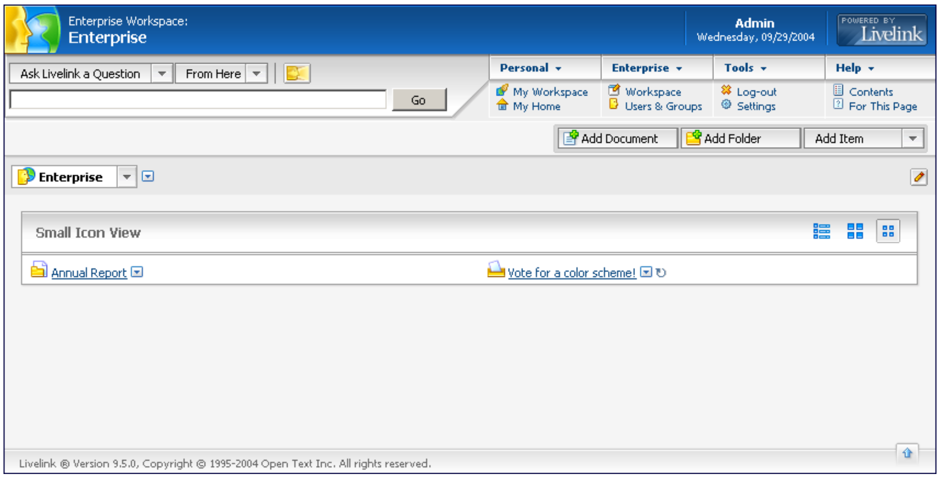


Figure 2-g: Small Icon Browse View

Changing Your Personal Settings

Your personal settings let you specify certain preferences for working with Livelink. These settings appear on the **Tools** menu. By default, the following tabs are available on the Settings pages:

- **General**, which lets you customize the way you view information in Livelink. For example:
    - You can use Enhanced Keyboard Accessibility Mode, which allows you to work with Livelink using keyboard commands instead of a mouse or other pointing device. For more information, see "Using Enhanced Keyboard Accessibility Mode," page 20.
    - You can replace the **Navigation** drop-down list with a trail of hyperlinks that represent the hierarchical path to the currently displayed item. Some users find this type of navigation more intuitive. For more information, see "Using Navigation and Function Controls," page 21.
    - In the Detail browse view, you can choose to see descriptions of items, if they are provided. The descriptions are taken from the **Description** field on the **General** tab of an item's Properties page. For more information, see "Viewing and Modifying Item Properties," page 40.
- **Color**, which lets you pick a color scheme for your Livelink interface.
- **Discussion**, which lets you specify your default view of Discussions in Livelink. For information about Discussion settings, see "Adding and Viewing Discussions," page 114.
- **Workflow**, which lets you manage how you participate in automatically executing work processes. For information about Workflow settings, see "Specifying Workflow Settings" in the "Automating Business Processes" section of the *Livelink User Online Help*.
- **Password**, which lets you maintain your password for Livelink.

Note: When you modify these settings, you override the settings specified by your Livelink Administrator. However, your Livelink Administrator may not permit you to change some of these settings.

Accessing the Settings Pages

To access the Settings pages:

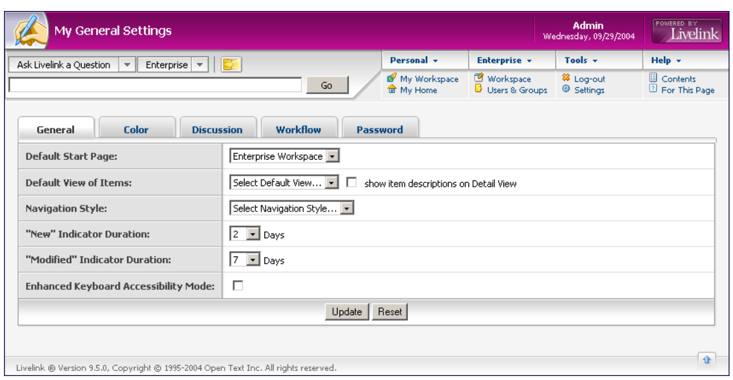
- Choose **Settings** on the **Tools** menu, and then click the tab that contains the information you want to change.

Changing Your General Settings

To change your general settings:

1. Choose **Settings** on the **Tools** menu, and then do the following on the My General Settings page:

To change this setting . . .	*Do the following . . .*
Specify which page appears upon logging in to Livelink	Click a page in the **Default Start page** drop-down list.
Change the default browse view	Click a view in the **Default View of Items** drop-down list.
Show descriptions of items (if they are provided on the **Description** field on the **General** tab of an item's Properties page)	Select the **show item descriptions on Detail View** check box.
Specify the navigation style	Click a style in the **Navigation Style** drop-down list.
Specify the number of days the New and Modified icons appear beside items	Click a value in the **"New" Indicator Duration** and **"Modified" Indicator Duration** drop-down lists.
Enable keyboard navigation	Select the **Enhanced Keyboard Accessibility Mode** check box.



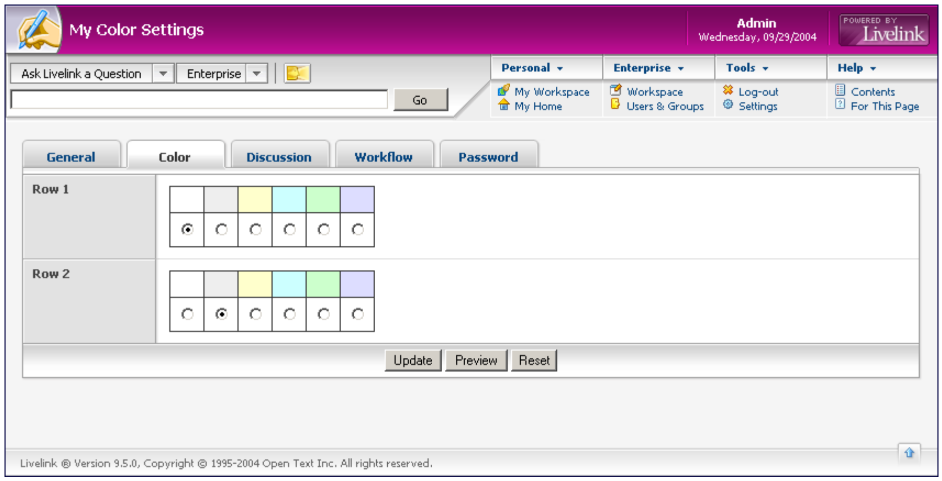
2. Click the **Update** button.

Changing Your Color Settings

To change your color settings:

1. Choose **Settings** on the **Tools** menu.
2. On the My General Settings page, click the **Colors** tab.

3. On the My Color Settings page, select a color for each of the following sections by clicking the color's radio button:
   - Row 1
   - Row 2

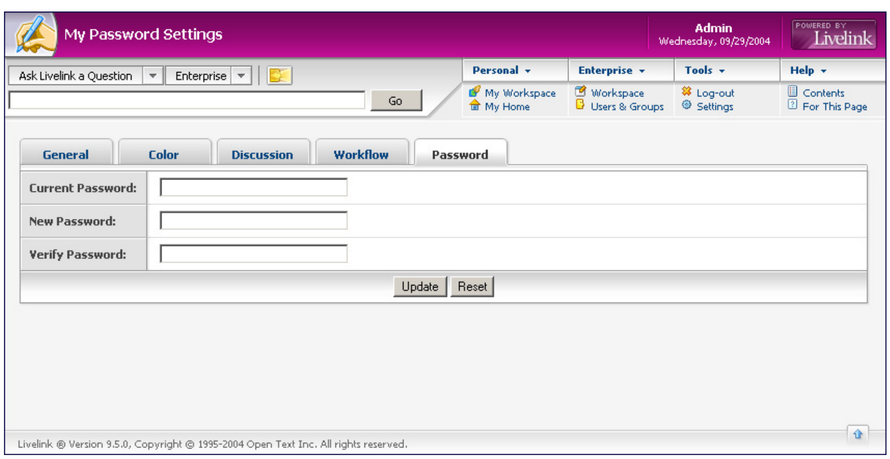


4. Click the **Update** button.

Changing Your Password Settings

To change your password settings:

1. Choose **Settings** on the **Tools** menu.
2. On the My General Settings page, click the **Password** tab.



3. On the My Password Settings page, type your current password in the **Current Password** field.
4. Type your new password in the **New Password** field, and then retype it in the **Verify Password** field.
5. Click the **Update** button.

Customizing Workspaces and Containers

If you have the proper permissions, you can configure Workspaces and containers in Livelink to make them more usable, informative, and recognizable to other users. You can make configuration settings on a Workspace or container's Configure page or on the **Presentation** tab of a Workspace or container's Properties page.

On the Configure page, you can:

- Specify a default browse view when the container is opened.
- Designate certain items as Featured, so that they appear in a separate Featured Items section above the other items on a page.
- Designate certain items as Hidden, so that you can hide items that you do not want other users to access, or that you do not need, without having to delete them.
- Delete items that you no longer need.

On the **Presentation Properties** tab, you can:

- Set the number of links to appear with a Featured Item that is a container or Workspace.
- Add banner images.
- Enable a News Player. For more information, see "Enabling a News Player," page 127.

You can also make advanced customizations by creating an Appearance or a Custom View. For more information, see "Working with Appearances" and "Working with Custom Views" in the "Customizing Livelink" section of the *Livelink User Online Help*.

Configuring a Workspace or Container

To configure a Workspace or container:

1. Click the **Configure** icon .
2. Do any of the following:
   - Type a new name in the item's **Name** field.
   - Click one of the following radio buttons for each item:
   - o **List**
   - o **Featured**
   - o **Hidden**
   - o **Delete**
3. Click the **Update** button.

Tip: You can also configure these settings for individual items on the **General** tab of the item's Properties page.

Changing Presentation Settings

To change the presentation settings for a Workspace or container:

1. Click a Workspace or container's **Functions** icon, choose **Properties**, and then choose **Presentation**.
2. Click the **Configure** icon .
3. Do any of the following:
   - Click a radio button in the **# of Featured Subitems** field to specify the number of Featured Subitems that appear as links below a Featured Item.
   - In the **1st Banner** or **2nd Banner** section, do the following:
     - o To add or change a banner image, click the **Browse Livelink** button, navigate to an image, and then click its **Select** link.
     - o To add a description for the image, type it in the **ALT Text** field.
     - o To link the image to a Web site, type a URL in the **Target URL** field.
4. Click the **Submit** button.

Using My Home and My Workspace

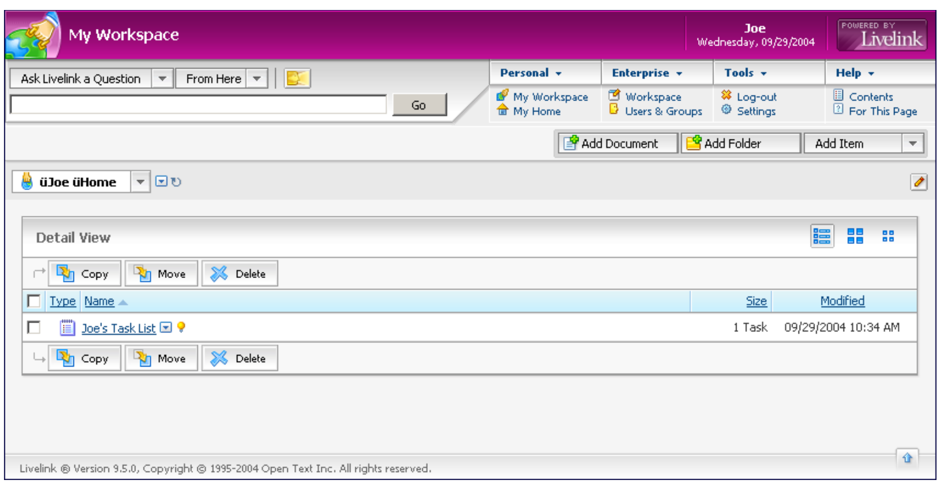
Every Livelink user has a personal work area called *My Workspace*. In addition, you can access items and information relevant to you on your My Home page and personal report pages.

Using My Workspace

The My Workspace is a location in Livelink over which you have complete control. With the exception of the Livelink Administrator, you are the only user with access to your personal My Workspace. You have full permissions over this Workspace and other users cannot access it directly. However, you can grant users permissions to access or view individual items in your My Workspace. For more information about granting users access to items stored in your My Workspace, see "Managing Permissions," page 59.

Note: If your Livelink Administrator allows you to customize your My Workspace, you can create a Custom View or an Appearance for it. For more information, see the "Customizing Livelink" section of the *Livelink User Online Help.*

For information about changing the color scheme and other settings, see "Changing Your Personal Settings," page 26.



Accessing My Workspace

To access My Workspace:

- Choose **My Workspace** on the **Personal** menu.

Using My Home

My Home is an overview page that provides system-generated information relevant to you. The information that appears in each section is determined by the activities you perform in Livelink.

When you access the My Home page, the following sections appear:

- **Assignments**, which displays the last 20 Assignments, in order of earliest due dates, that appear on your My Assignments page. Completed assignments are not displayed.
- **Recently Visited Items**, which displays the last five items that you opened.
- **What's New**, which displays the last five items that you added.
- **Favorites**, which displays alphabetically all the items listed on the default tab of your Favorites page.

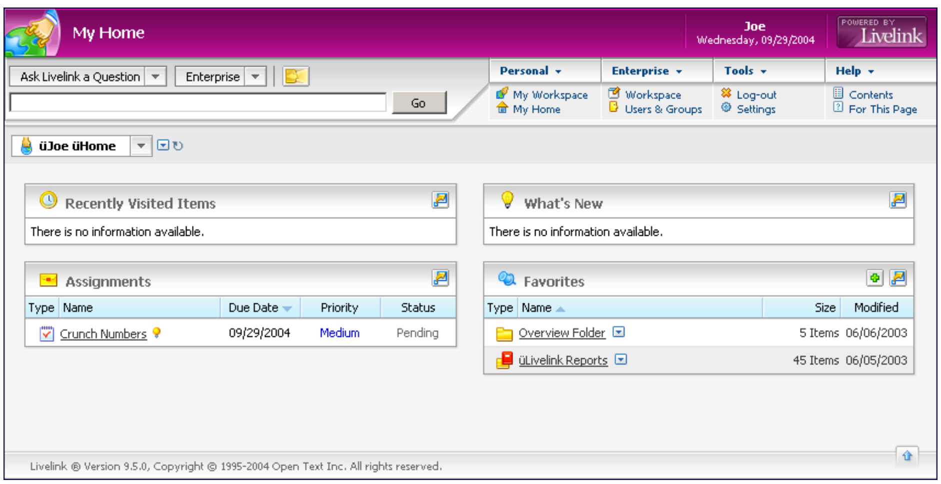


Figure 2-h: The My Home Page

From each section on the My Home page, you can view the report page that is relevant to that section. For more information, see "Viewing Personal Report Pages".

Accessing My Home

To access the My Home page:

- Choose **My Home** on the **Personal** menu.

Viewing Personal Report Pages

You can view information specific to you on your personal report pages. Many of the report pages are divided into tabs, which allow you to organize items based on your own preferences. For more information about report page tabs, see “Managing Report Page Tabs,” page 36.

The following table describes each personal report page.

Table 2-2: The Personal Report Pages

Report Page Name	***This report page. . .***	***For more information, see. . .***
Assignments	Contains a complete list of Tasks that are assigned to you.  represents a Task, and  represents a Workflow Task.	“Working with Tasks and Task Lists,” page 137; “Monitoring Workflows and Assignments” in the “Automating Business Processes” section of the *Livelink User Online Help*
Collections	Stores the collected Shortcuts to Livelink items.	“Using Collections” in the “Retrieving Information” section of the *Livelink User Online Help*
Discussions	Lists all the Discussions that you have permission to see.	Chapter 7: “Communicating with Discussions”
Favorites	Stores links to items that you have added as Favorites.	“Managing Favorites,” page 57
My Groups	Lists every group of which you are a member.	Chapter 6: “Working with Users and Groups”
My Profile	Lists information associated with your user account. If you have the Edit Self privilege for a tab, denoted by the **Edit** icon, you can edit user information.	Chapter 6: “Working with Users and Groups”
News	Lists all Channels that you have permission to see.	Chapter 9: “Working with Channels and News”
Notification	Lists your personal Notification reports and provides options for configuring them.	“Using Notifications” in the “Communicating News and Updates” section of the *Livelink User Online Help*
Projects	Lists all Projects and Sub-Projects for which you are a Participant.	Chapter 10: “Working with Projects”
Prospectors	Lists the Prospectors that you have created.	“Using Prospectors” in the “Retrieving Information” section of the *Livelink User Online Help*
Recommendations	Lists items that Livelink determines are of interest to you.	Chapter 4: “Using Recommendations and Ratings”

Table 2-2: The Personal Report Pages

Report Page Name	This report page. . .	For more information, see. . .
Reports	Lists all LiveReports that you can open and all Search Queries and Snapshots that you have created.	"Using LiveReports" in the "Retrieving Information" section of the *Livelink User Online Help*; Chapter 3: "Searching Livelink"
Reserved Items	Lists items that are currently reserved by you or by one of your groups.	Chapter 5: "Managing Documents and Records"
Task Lists	Lists all Task Lists that you have permission to see.	Chapter 11: "Working with Tasks and Task Lists"
Workflow Status	Displays the Workflows that you have permission to see and those initiated from particular Workflow Maps.	"Monitoring Workflows and Assignments" in the "Automating Business Processes" section of the *Livelink User Online Help*.

Editing Your Personal Profile

Your user information is stored in two tabs of the My Profile page:

- **General**, which contains your log-in name, password, contact information, and privileges.
- **Personal**, which contains personal information, such as a photograph, birthday, personal interests, and home contact information.

Notes: You must have the Edit Self privilege for a tab in order to change your personal information. The **Edit** icon indicates that you have that privilege.

When you view your user information about another user, the page title reads *User Info*.

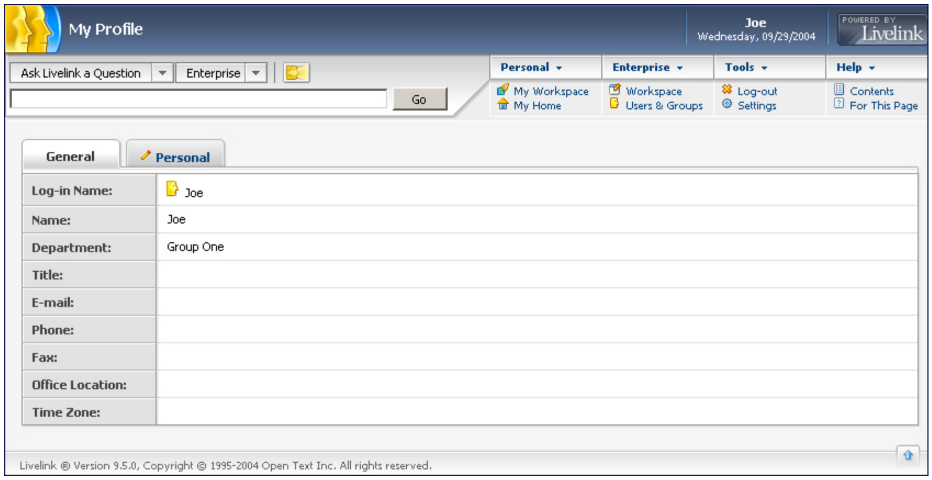


Figure 2-i: The My Profile Page

For information about editing your personal profile, see “Adding Users and Editing User Information,” page 107.

Managing Report Page Tabs

Many of the personal report pages can be divided into *tabs*. Tabs help you organize your report pages so that you can easily find documents and other work items that are important to you.

Note: If you are a member of a Project, you also have access to Project report pages, which behave and function much the same way.

By default, report pages with tabs include a default tab that cannot be removed. When items are added to a report page, they automatically appear on the default tab. On some report pages, you can only copy items from the default tab to another tab. For example, on the Favorites report page, you can copy items to another tab, but you cannot delete them from the default **All** tab.

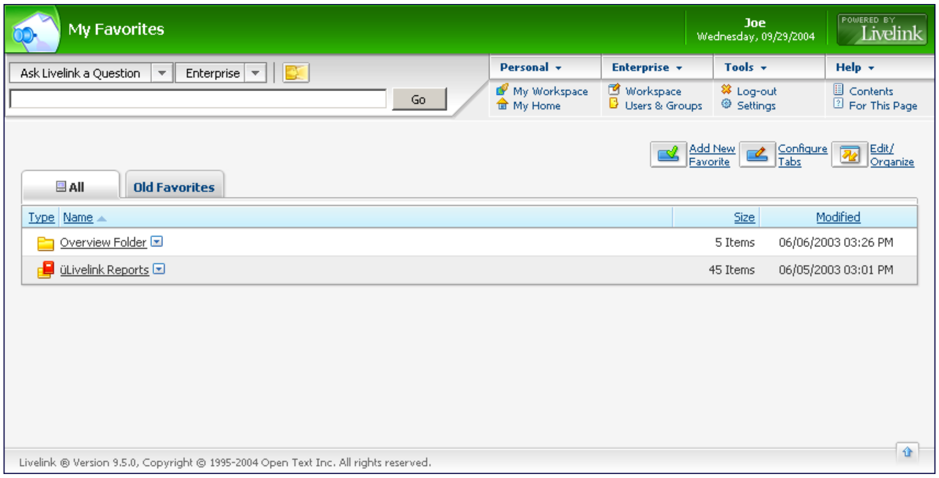


Figure 2-j: The My Favorites Page

On most report pages with tabs, you can add or remove tabs and set a new default tab. When more than one tab exists on a report page, the default tab appears in front of the other tabs. You can also move items to different tabs, and on some pages, you can add items as Favorites.

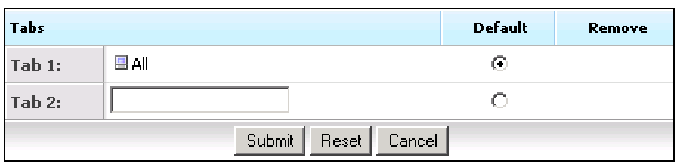
Note: If a report page allows you to modify tabs, the **Configure Tabs** and **Edit/Organize** buttons appear.

Adding a Tab

You can add, edit, and organize the tabs for most personal report pages.

To add a tab to a Personal or Project report page:

1. Choose a report page on one of the following menus:
   - **Personal**
   - **Project**
2. On the *Report Name* page, click the **Configure Tabs** button.
3. Click the **Add Tabs** button.
4. Type a name for the tab in the **Tab *number*** field.



5. Click the **Default** radio button next to the tab you want to appear first on the report page.
6. Click the **Submit** button.

Moving an Item to a Different Tab

To move an item to a different tab:

1. Choose a report page on one of the following menus:
   - **Personal**
   - **Project**
2. On the *Report Name* page, click the tab where the item you want to move is located, and then click the **Edit/Organize** button.
3. Click the name of tab you want the item moved to in its drop-down list.
4. Click the **Submit** button.

Setting a Default Tab

To set a default tab:

1. Choose a report page on one of the following menus:
   - **Personal**
   - **Project**
2. On the *Report Name* page, click the **Configure Tabs** button.

3. Click the **Default** radio button for the tab that you want to appear first on the report page.
4. Click the **Submit** button.

Working with General Items

This section covers the following topics:

Viewing and Modifying Item Properties

Livelink automatically stores and maintains a set of basic information for every item in the system. This information is displayed on a series of tabs on the item's Properties page. Different item types have different Properties tabs. For example, the **Link** tab appears only on the Properties page of Shortcuts to a Compound Document. In addition, the information that appears on a particular tab depends on the type of item.

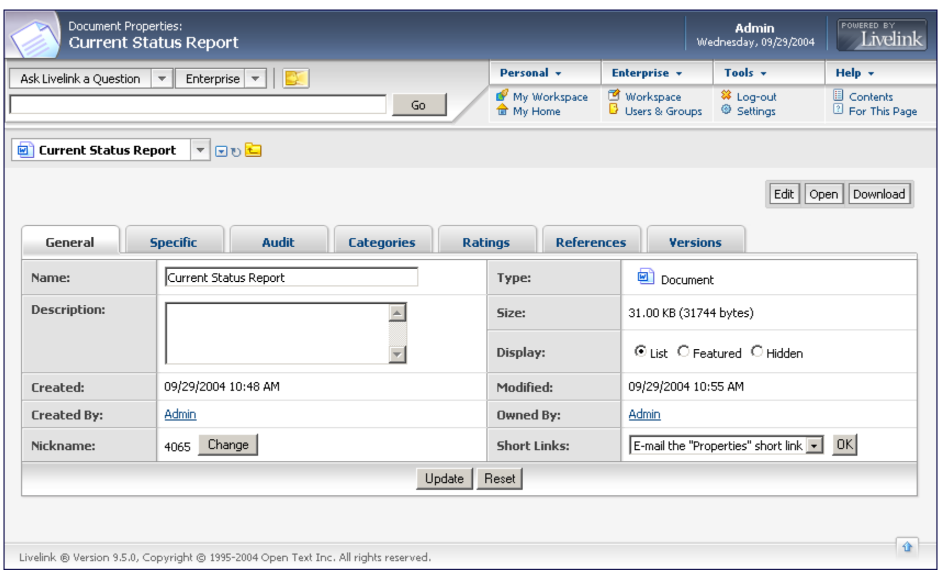


Figure 2-k: The Properties Page for a Document

The Properties page for different types of Livelink items varies. The following table describes the tabs that appear on the Properties page of an item.

Table 2-3: Properties Page Tabs

Info Page	*Description*
General	Displays basic parameters and information about an item, such as the date and time it was created, and who currently owns it. Other information on this tab depends on the type of item.
Specific	Displays information that is unique to the item's type. This tab is present for items such as Documents, Compound Documents, Channels, Queries, URLs, and Projects.
Audit	Displays an *audit trail* (log of events) for an item. Typical audit events include when the item was added, opened, or modified; the date of each action; and the user who performed the action.
Categories	Lists the custom Categories that are applied to an item.
Presentation	Displays information about how a Workspace or container is displayed.
Ratings	Displays information about how other users have rated a Document.
References	Displays any Shortcuts or Generations that point to an item and information about the Shortcut or Generation.
Statistics	Displays all the Topics and Replies that have been posted to a Discussion, including user names, number of Topics and Replies posted, total number posted, and the date of the most recent posting.
Versions	Provides access to all Versions of an item stored in Livelink. For each Version, Livelink displays such information as the Version number and the name of the user who created it. If your Livelink system uses multiple storage providers, this tab also shows where the file representing the Version is physically stored. Each Version displays its own **Functions** icon, which you can use to work with a previous Version instead of the current one.
Link	This tab appears only for a Shortcut that points to a Compound Document. It shows which Release or Revision of the Compound Document the Shortcut currently points to.
Releases	Displays all Releases and Revisions of a Compound Document. For each Release and Revision, Livelink displays its name and number, the date and time it was created, and the user who created it.

Viewing Item Properties

To view the Properties page for an item:

- Click the item's **Functions** icon, choose **Properties**, and then choose ***tab name***.

  Optionally, click another tab on the Properties page to view its information.

Tip: When viewing a Properties page for a Version, you can move between Versions using the drop-down list next to the **Versions** icon .

Modifying Item Properties

If you have the proper permissions, you can edit some of the information presented on a Properties tab. In some cases, a function can be performed *only* from an item's Properties page. These functions include:

- Updating the **General** tab to modify the **Name** and **Description** fields and change how the Document appears in its container (make it Featured or Hidden).
- Updating the **Presentation** tab to display the News items in a Channel. For more information, see "Working with Channels," page 126.
- Applying a Category to an item or edit an existing Category. For more information, see "Working with Categories and Attributes" in the "Retrieving Information" section of the *Livelink User Online Help*.
- Accessing a previous Version of the Document. For more information, see "Working with Versions," page 90.
- Editing a Shortcut or viewing a list of all the Shortcuts to an item. For more information, see "Working with General Items," page 40.
- Editing a URL. For more information, see "Working with Shortcuts and URLs," page 54.
- Editing a Prospector. For more information, see "Using Prospectors" in the "Retrieving Information" section of the *Livelink User Online Help*.
- Assigning a nickname to an item or copying or e-mailing nickname URLs. For more information, see "Assigning Nicknames to Items," page 49.
- Designating an item as a Best Bet when presenting search results. For more information, see "Working with Search Results" in the "Retrieving Information" section of the *Livelink User Online Help*.
- If you have the Modify permission on a Document, you can:
    - Apply a Category to an item or edit an existing Category.
    - Access or work with a previous Version of the Document.

Properties Pages for Versions

You can view any of the following Properties pages for a Version:

- General Version Properties page, which contains basic information about a particular Version of an item.
- Specific Version Properties page, which provides detailed information about a particular Version of an item.

- Categories Version Properties page, which displays the Categories and attribute settings associated with a particular Version.
- References Version Properties page, which lists any Shortcuts or Generations that point to a particular Version.

For more information about Versions, see “Working with Versions,” page 90.

Opening Items

Open is the default action for most items when you click the ***item name*** link. Clicking the item name always performs the default action for the type of item. For example, clicking the name of a Folder opens the Folder so that you can see the items inside it. For items that have no **Open** command, the default action for accessing or viewing the item is performed.

To open an item:

- Click the item’s **Functions** icon, and then choose **Open**.

Adding Items

The **Add Item** menu appears anywhere in Livelink where you have permission to add items. The options available to you when adding an item vary, depending on the item type. For this reason, there are individual Help pages for adding each item type.

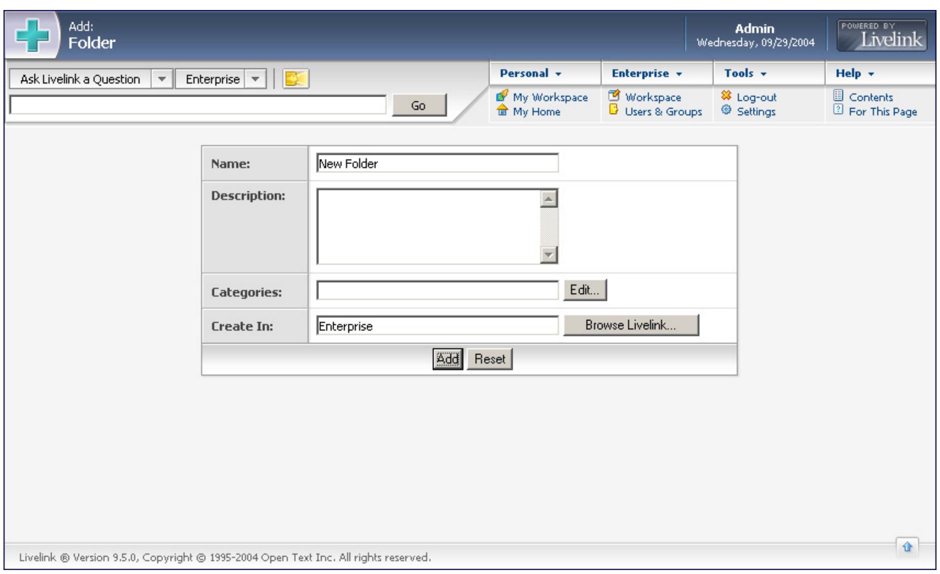


Figure 2-I: The Add Folder Page

There are some parameters you can specify that are common to almost all items you add. These parameters, listed in the following table, are not required to successfully add an item.

Table 2-4: General Setting Options When Adding an Item

Parameter	***Description***
Name	Livelink supplies a default name for any item you add (for Documents, it uses the name of the file being added). However, providing a descriptive name in the **Name** field can add information about the item's content and purpose. It also makes it more likely to be correctly identified by a Search Query or a LiveReport.
Description	By adding a description you increase the chances that a Search Query or a LiveReport will correctly identify the item. Livelink indexes the text in the **Description** field as part of the item's *metadata* (information about the item). The more metadata an item has, the better Livelink can identify its content and purpose.
MacBinary (set before selecting a file)	If you use a Macintosh computer to work with Livelink, the Add Document page may display a **MacBinary** check box. Select this check box when uploading a file. For more information about Macbinary files, see "Adding Macintosh Files to Livelink," page 45.
Categories	You use the **Categories** field to apply one or more attributes to an item that you add. For more information, see "Working with Categories and Attributes" in the "Retrieving Information" section of the *Livelink User Online Help*.
Create In	By default, an item is added to the current container. However, you can add the item to a different container.

To add an item:

1. Click item type on the **Add Item** menu.
2. On the item's Add page, type a name for the item in the **Name** field.
3. Type information about the item in the **Description** field.
4. Specify any other general item settings.
5. Click the **Add** button.

How Permissions Affect Adding Items

When adding items to Livelink, keep in mind that access to the items you add is controlled by permissions. By default, any item that you add inherits its permissions from the container you put it in. For example, if a group has See Contents permission on a Folder, members of that group will have permission to see any Document you add to that Folder. However, it is possible to modify the permissions of individual items in a Folder. You become the Owner of the items you add, and therefore always have full permissions on those items. For more information, see "Managing Permissions," page 59.

Adding Macintosh Files to Livelink

If you use a Macintosh computer, certain Livelink pages may display a **MacBinary (set before selecting a file)** check box. The check box appears on pages that allow you to upload files from your computer. Selecting the check box ensures that the files you upload to Livelink are transferred properly. If you attempt to upload a Macintosh file to Livelink without selecting the check box, the file may not upload in its entirety.

MacBinary is a standard format developed to facilitate the transfer of Macintosh documents. It combines the two components of a standard Macintosh file—the resource fork and data fork—into a single package. A MacBinary file can be stored in a Livelink system running on a non-Macintosh computer, but such a file downloaded from Livelink can be used only on a Macintosh computer.

MacBinary files in Livelink are indicated by the MacBinary icon .

Deleting Items

You can delete items individually or (in the Detail View) delete multiple items at the same time. By default, deleting an item permanently removes it from the Livelink database. However, your Livelink Administrator may be able to recover deleted items or enable you to recover them yourself. For more information, contact your Livelink Administrator.

Not all items can be deleted. For example, you cannot delete a Document if one of its Versions is locked. In some cases, you may be unable to delete an item because of permissions.

Note: Deleting an item does not remove any Shortcuts to that item. You must delete those manually. You can view the Shortcuts to an item on its **References Properties** tab.

To delete one or more items:

1. From the Detail View of a container, select the check box for each item you want to delete, and then click the **Delete** button.
2. On the Items to be Deleted page, click the **Delete** button.
3. On the Deleting Items page, click the **OK** button.

Tip: You can also delete a single item by clicking its **Functions** icon, and then choosing **Delete**.

Renaming Items

Most items in Livelink can be renamed, depending on the item type and your permissions. Livelink supplies a generic name for any item you add (for Documents, it uses the name of the file being added). However, providing a descriptive name can add useful information about the item's content and purpose. It also makes it more likely to be correctly identified by a Search Query or a LiveReport.

To rename an item:

1. Click the item's **Functions** icon, and then choose **Rename**.
2. On the Rename page for the item, type a name for the item in the **Name** field.
3. Click the **Update** button.

Tip: You can also rename an item from its **General Properties** tab.

Copying Items

Most items in Livelink can be copied, depending on the item type and your permissions. You can copy items individually or (in the Detail View) copy multiple items at the same time.

When you copy an item, you create a duplicate of the original and save it somewhere else in Livelink. The original item remains in its current location. You also have the option to add a Version to the copied item.

Not all items can be copied. For example, you cannot copy an item to a container on which you do not have the Add Item permission.

Notes: Copying an item can change its permissions. For more information, see "Managing Permissions," page 59.

The way advanced versioning Documents are copied depends on your permissions on that Document. For more information about copying an advanced versioning Document, see "Understanding Advanced Versioning Behavior," page 95.

Tip: Instead of copying the same item to multiple locations, you can create a Shortcut to the item. For more information, see "Working with Shortcuts and URLs," page 54.

How Copying Items Affects Their Categories

Copying items can affect their Category assignments. When you copy an item, you have three options regarding its Categories:

- You can keep the copy's original Categories in its new location.
- You can apply the Categories of the new location to the copy.
- You can keep the copy's original Categories and merge them with the new location's Categories.

For more information about Categories, see "Working with Categories and Attributes" in the "Retrieving Information" section of the *Livelink User Online Help*.

Copying Items

To copy one or more items:

1. From the Detail View of a container, select the check box for each item you want to copy, and then click the **Copy** button.
2. On the Copy page, click the **Browse Livelink** button, navigate to the location you want the item copied, and then click its **Select** link.

   Optionally, type a new name in the **Name** field.

   Optionally, select the **Add Version** check box.
3. Click one of the following radio buttons in the **Categories** section:
   - **Original**, which retains the item's Category and attribute settings
   - **Destination**, which resets the item's Category and attribute settings to those of the location where you copy the item
   - **Merged**, which retains the item's Category and attribute settings and associates the settings of the location where you copy the item. You can only merge the Category and attribute settings for single items. When you copy multiple items, the **Merged** radio button does not appear.

   Optionally, click the **Edit** button to modify the item's Categories.
4. On the Items to be Copied page, click the **Copy** button.
5. On the Copying Items page, click the **OK** button.

Note: The **Add Version** check box only appears for items that can have Versions.

Tips: You can copy a single item by clicking its **Functions** icon, and then choosing **Copy**.

Instead of copying the same item to multiple locations, you can create a Shortcut to the item. For more information, see "Working with Shortcuts and URLs," page 54.

Moving Items

Most items in Livelink can be moved, depending on the item type and your permissions. You can move items individually or move multiple items at the same time.

When you move an item to a different location, you remove it from its original location. Any Shortcuts or Generations that point to the item are automatically updated to refer to the item in its new location. You also have the option to add a Version to the moved item in its new location.

Not all items can be moved. For example, you cannot move an item to a container on which you do not have the Add Item permission.

Note: Moving an item can change its permissions. For more information, see "Managing Permissions," page 59.

How Moving Items Affects Their Categories

Moving items can affect their Category assignments. When you move an item, you have three options regarding its Categories:

- You can keep the item’s original Categories in its new location.
- You can apply the Categories of the new location to the item.
- You can keep both the original Categories and merge them with the new location’s Categories.

For more information about Categories, see “Working with Categories and Attributes” in the “Retrieving Information” section of the *Livelink User Online Help*.

Moving Items

To move one or more items:

1. From the Detail View of a container, select the check box for each item you want to move, and then click the **Move** button.
2. On the Move page, click the **Browse Livelink** button, navigate to the location you want the item moved, and then click its **Select** link.

   Optionally, type a new name in the **Name** field.

   Optionally, select the **Add Version** check box.
3. Click one of the following radio buttons in the **Categories** section:
   - **Original**, which retains the item’s Category and attribute settings
   - **Destination**, which resets the item’s Category and attribute settings to those of the location where you move the item
   - **Merged**, which retains the item’s Category and attribute settings and associates the settings of the location where you move the item. You can only merge the Category and attribute settings for single items. When you move multiple items, the **Merged** radio button does not appear.

   Optionally, click the **Edit** button to modify the item’s Categories.
4. On the Items to be Moved page, click the **Move** button.
5. On the Moving Items page, click the **OK** button.

Note: The **Add Version** check box only appears for items that can have versions.

Tip: You can move a single item by clicking its **Functions** icon, and then choosing Move.

Reserving and Unreserving Items

You can prevent other users from making changes to an item you are working on by reserving the item for yourself or for any group to which you belong. The following Livelink items are reserveable:

- Documents
- Text Documents
- Extensible Markup Language Document Type Definitions (XML DTDs)
- Item Templates
- Project Templates
- Custom Views
- Prospector Queries

When you have an item reserved, other users can see the item in read-only mode, but cannot make changes until you unreserve it. If the reserved item is a versionable item type, you can add a Version of the item when you unreserve it. For more information about Versions, see "Working with Versions," page 90.

Notes: If you reserve an item for a group, any user in that group can unreserve it.

Reserving a Document also happens automatically as part of an edit session. For more information about editing Documents, see "Adding and Editing Documents," page 80.

Reserving Items

To reserve an item:

1. Click an item's **Functions** icon, and then choose **Reserve**.
2. On the Reserve page, click your name, or the name of a group, in the **Reserved By** field.

   Optionally, click the **Download** link to download the most recent Version of the item to your computer.
3. Click the **Submit** button.

Unreserving Items

To unreserve an item:

1. Click a reserved item's **Functions** icon, and then choose **Unreserve**.
2. On the Unreserve page, click the **Submit** button.

Tip: You can add a new Version of the item to Livelink at the time you unreserve it. For more information, see "Working with Versions," page 90.

Assigning Nicknames to Items

A *nickname* is a word or phrase assigned to an item in Livelink. When you assign a nickname to an item, a short URL is generated for accessing both the item and its Properties page.

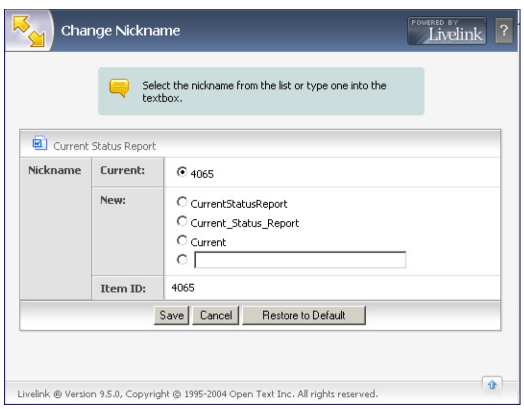
If you do not specify a nickname for an item, the item's object ID is automatically assigned as the nickname. When you assign an item a nickname, you can choose one of three nicknames provided by Livelink, or you can specify an alphanumeric word or phrase of your choice.

Nicknames can also be used as search terms. When you search for an item by nickname, the action drop-down list in the Search Bar only contains the Open and Properties items. For more information, see "Using the Livelink Search Bar," page 65.

To assign a nickname to an item:

1. Click an item's **Functions** icon, choose **Properties**, and then choose **General**.
2. On the **General** tab of the Properties page, click the **Change** button in the **Nickname** section.
3. In the Change Nickname window, do one of the following:
   - Click the radio button beside one of the automatically generated nicknames.
   - Click the radio button beside the text field, and then type a nickname that consists of no more than 40 alphanumeric characters and the following special characters:

     ! % ( ) - { } [ ] ; " \ ' < > ? , .



   Tip: To restore the nickname to its default Item ID, click the **Restore to Default** button.

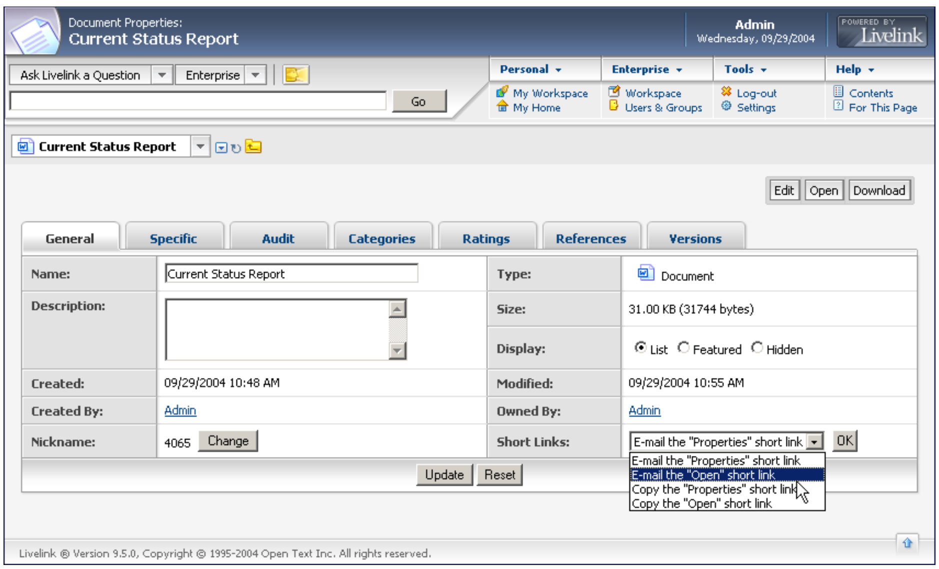
4. Click the **Save** button.
5. On the **General** tab of the Properties page, click the **Update** button.

E-mailing or Copying Nickname URLs

You can e-mail the short URL for either the item's Open command or its Properties page, or you can copy their corresponding hyperlinks to your computer's clipboard.

To e-mail or copy a nickname URL:

1. Click an item's **Functions** icon, choose **Properties**, and then choose **General**.
2. On the **General** tab of the Properties page, click one of the following in the **Short Links** drop-down list:
   - E-mail the "Properties" short link
   - E-mail the "Copy" short link
   - Copy the "Properties" short link
   - Copy the "Open" short link



3. Click the **OK** button.

Working with Folders

You use Folders to organize your work in Livelink the same way that you work with folders on your computer. The Folder is the most versatile type of container in Livelink because it can contain any other type of item, including Projects and other Folders. A Folder inside another Folder is sometimes called a *Subfolder*.

Adding a Folder

The **Add Item** menu and **Add Folder** button appear at the top right of every Workspace or container page where you have the permission to add a Folder. When you add a Folder to Livelink, you can provide a description of the Folder, modify its Categories and attributes, and add the Folder to a different container. For more information about adding items, see “Adding Items,” page 43.

To add a Folder:

1. Click **Folder** on the **Add Item** menu.
2. On the Add Folder page, type a name for the Folder in the **Name** field.

   Optionally, to choose an alternative icon for the Folder, click the **Select Icon** button, and then click an icon on the Select Icon page.
3. Click the **Add** button.

Note: The **Select Icon** button appears only if your Livelink Administrator has enabled this functionality.

Configuring a Folder

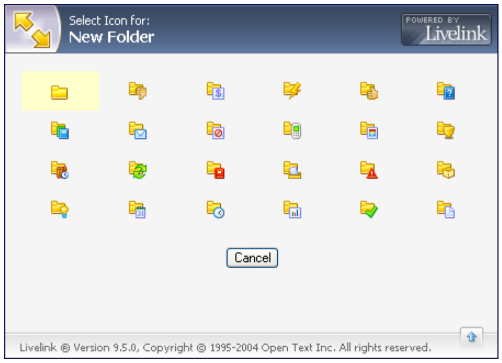
If you have the proper permissions, you can configure the appearance of a Folder. For more information, see “Customizing Workspaces and Containers” in the “Quickstart Help” section of the *Livelink User Online Help*.

A unique configuration option when adding a Folder, if permitted by your Livelink Administrator, is to choose from an assortment of different icons for it. This can be useful if you want to visually distinguish the Folder or give users and indication of what kind of information the Folder contains. You can specify an alternative icon when you add a Folder or, if you have the proper permissions, on the **General** tab of the Folder’s Properties page. For more information, see “Viewing and Modifying Item Properties,” page 40.

To change a Folder icon:

1. Click the Folder’s **Functions** icon, choose **Properties**, and then choose **General**.
2. On the **General** tab of the Folder’s Properties page, click the **Select Icon** button.

3. On the Select Icon page, click an icon.



4. On the Properties page, click the **Update** button.

Folder Permissions

By default, any item that you add to a Folder inherits its permissions from the Folder you put it in. For example, if a group has See Contents permission on a Folder, members of that group will have permission to see any item you add to that Folder. However, it is possible to modify the permissions of individual items in a Folder. For more information, see “Managing Permissions,” page 59.

Working with Shortcuts and URLs

Shortcuts and URLs are *reference item types* (item types that refer to another item). Shortcuts point to other Livelink items, while URLs point to Web addresses (usually outside of Livelink).

Working with Shortcuts

A common document management requirement is the ability to have exactly the same item in more than one place. Shortcuts are useful when you want to:

- Provide access to an item in any number of places within the system without having to maintain multiple copies of the same item
- Create pointers to an item that may be hard to find

Shortcuts always point to the most recent Version of the item. When the original item is modified or moved, all Shortcuts are updated automatically. However, when an original item is deleted, any Shortcuts to it must be deleted manually. You can make a Shortcut to most item types in Livelink.

Note: Shortcuts are subject to permissions. For example, you need the See permission on the original item to be able to make or use a Shortcut.

After adding a Shortcut to Livelink, you can provide a description of the Shortcut, modify its Categories and attributes, and add the Shortcut to a different container. For more information about adding items, see “Adding Items,” page 43.

Adding a Shortcut

To add a Shortcut:

1. In the Workspace or container where you want to add a Shortcut, click **Shortcut** on the **Add Item** menu.
2. On the Add Shortcut page, type a name for the Shortcut in the **Name** field.
3. Click the **Browse Livelink** button, navigate to the item you want to make a Shortcut for, and then click its **Select** link.
4. Specify any other general item settings.
5. Click the **Add** button.

Tip: You can also add a Shortcut by clicking an item’s **Functions** icon, and then choosing **Make Shortcut**.

Editing a Shortcut

To edit a Shortcut:

1. Click a Shortcut's **Functions** icon, choose **Shortcut**, choose **Properties**, and then choose one of the following Properties tabs:
   - **General**
   - **Specific**
   - **Audit**
   - **Categories**
2. On the **Properties** tab you chose, modify the settings you want.

   Optionally, click another tab, and then modify any settings on that tab.
3. Click the **Update** button.

Note: For information about editing information on the **Categories** tab, see "Working with Categories and Attributes" in the "Retrieving Information" section of the *Livelink User Online Help*.

The Shortcut Functions Menu

The **Functions** menu of Shortcuts is divided into two submenus: ***Original*** and ***Shortcut***.

- The **Original** submenu contains functions that you have permission to perform on the *original item* (the item that the Shortcut points to). The functions on the **Original** submenu do not affect the Shortcut.
- The **Shortcut** submenu contains functions that you have permission to perform on the Shortcut. The functions on the **Shortcut** submenu do not affect the original item.

Opening a Shortcut

To open a Shortcut:

- Click a Shortcut's **Functions** icon, choose **Shortcut**, and then choose **Open**.

To work with an original item from its Shortcut:

- Click the Shortcut's **Functions** icon, choose **Original**, and then choose the function you want.

Note: The **Open** function for a Shortcut performs the default operation for the original item. In most cases, this will open the original item.

Working with URLs

URLs in Livelink are similar to Web browser favorites or bookmarks. Opening a URL in Livelink passes that Internet address to your Web browser, which then displays the Web page.

The following can be saved as URLs in Livelink:

- World Wide Web addresses
- FTP sites
- E-mail addresses

Although you can use a URL to link to another Livelink item, it is preferable to use a Shortcut.

When you add a URL to Livelink, you can provide a description of the URL, modify its Categories and attributes, and add the URL to a different container. For more information about adding items, see “Adding Items,” page 43.

Adding URLs

To add a URL:

1. Click **URL** on the **Add Item** menu.
2. On the Add URL page, type a name for the URL in the **Name** field.
3. Type the URL in the **URL** field.
4. Click the **Add** button.

Editing URLs

To edit a URL:

1. Click a URL’s **Functions** icon, choose **Properties**, and then choose one of the following **Properties** tabs:
    - **General**
    - **Specific**
    - **Audit**
    - **Categories**
2. On the **Properties** tab you chose, modify the settings you want.

    Optionally, click another tab, and then modify any settings on that tab.
3. Click the **Update** button.

Managing Favorites

You can easily access frequently used items by adding them as *Favorites*. When you add an item as a Favorite, you are creating a marker to the item, and then storing it on the My Favorites page.

Almost any item in Livelink can be added as a Favorite. You can add a Favorite from the Workspace in which the item is located, report pages, the My Home page, and the My Favorites page.

Working with Favorites

The My Favorites page is one of your personal report pages. On this page, you can organize the items you classify as Favorites under different tabs, copy Favorites between the tabs, and remove items from the My Favorites page. For more information about organizing tabs, see “Managing Report Page Tabs,” page 36.

Adding Favorites

To add a Favorite:

To add a Favorite from. . .	*Do the following. . .*
A Workspace	Click the item’s **Functions** icon, and then choose **Add to Favorites**.
My Favorites page	Click the **Add New Favorite** button, navigate to an item, and then click its **Select** link.
A report page	Click the tab where the item is located, click the **Edit/ Organize** button, and then click a tab location in the **Favorites Tab** drop-down list for each item you want to add as a Favorite.
My Home page	In the **Favorites** section, click the **Add** button, navigate to an item, and then click its **Select** link.

Removing Favorites

To remove a Favorite:

1. Choose **Favorites** on the **Personal** menu.
2. On the Favorites page, click the tab where the Favorite item is located.
3. Click the item’s **Functions** icon, and then choose **Remove Favorite**.

Copying Favorites

To copy a Favorite to another tab:

1. Choose **Favorites** on the **Personal** menu.

2. On the Favorites page, click the tab where the Favorite item is located.
3. For each item you want to copy, click a new tab location in the item's **Favorites Tab** drop-down list.
4. Click the **Submit** button.

Managing Permissions

Permissions affect every item and location in Livelink. It is important to understand how permissions work and how they affect the work you do. For an introduction to permissions in Livelink, see "Understanding Permissions," page 11.

Every item in Livelink has an Access Control List (ACL), which determines which users and groups have access to the item and defines their permissions. By default, the ACL of every item includes permissions for the following:

- **Owner** , the user that has full permissions on the item. By default, the Owner is the user who created the item. However, ownership of an item can be transferred. Depending on your organization's requirements, this user does not necessarily have full permissions on the item.

- **Owner Group** , a group to which you want the item to "belong," and to which you want to assign extra permissions on the item. By default, an item's Owner Group is inherited from its container.

- Public Access , a designation that makes the item available to all users who have the Public Access privilege. Designating an item as Public Access lets you specify a general permissions set that is appropriate for general use. Because Public Access is a privilege that is in effect system-wide, you cannot modify the users included in this group.

By default, these three entries are a part of every item's ACL. However, they may be removed in some cases. For more information, contact your Livelink Administrator.

Editing an Item's Permissions

Setting individual permissions for each item that you add to Livelink can be a tedious and time-consuming process. That is why, in most cases, an item's permissions are *inherited* (based on the container to which it is added). However, you (or another user) can edit an item's permissions anytime after you add it.

By default, any user with the Edit Permissions permission on an item can:

- Grant access to an item to a user or group
- Modify the permissions that a user or group has on an item
- Remove access to an item from a user or group
- Change an item's Owner or Owner Group
- Enable or disable Public Access

Your Livelink Administrator can set additional access-control options that limit your ability to edit an item's ACL. For more information, contact your Livelink Administrator.

Issues When Copying and Moving Items

Because an item's permissions are affected by its container, copying or moving an item can change its permissions. When you copy an item to another container, the copied item inherits the destination container's permissions. When you move an item from one container to another, the item's permissions are affected in different ways, depending on the source and destination locations. In most cases, moved items inherit the destination container's permissions. However, a moved item retains its permissions in the following cases:

- Within the Enterprise Workspace, within your My Workspace, or within a Project
- From the Enterprise Workspace to your My Workspace or from your My Workspace to the Enterprise Workspace

For example, if you move a Folder from a Project into the Enterprise Workspace, the Folder inherits its permissions from the Enterprise Workspace. If you move a Folder from one Project to another, the Folder inherits the permissions of the destination Project.

Note: In some cases, your Livelink Administrator may choose to override this behavior.

Certain items, such as News items, Tasks, and Topics and Replies, cannot be copied or moved. However, these items do move if you move the container in which they reside. If you copy a container that contains items that cannot be copied, Livelink copies the container but omits the items that cannot be copied.

Note: Because different item types are governed by different permission types, permissions cannot always transfer precisely when items are added, moved, or copied. In these cases, Livelink must map the item's original permissions to the nearest corresponding permissions for its destination. For details about how the different permission types map to each other, see "Permissions Mapping," page 14.

Editing a Subitem's Permissions

When you change the permissions on a container, its subitems keep their original permissions unless you specify otherwise. When you apply permissions changes to subitems, you have the following option:

- **Replace**, which replaces the current permissions on the subitems with those specified.

  Note: **Replace** is the only option available for Owner, Owner Group, and Public Access users.
- **Add**, which adds any new user or group to the ACLs of the subitems, with the selected permissions.
- **Add & Replace**, which adds any new user or group to the ACLs of the subitems and replaces any current users, groups, and permissions with those specified.
- **Remove User**, which removes users or groups from the ACL and eliminates their permissions.

Note: When you edit permissions on a container that contains a Task List, Channel, or Discussion, Livelink automatically maps the container's permissions to the nearest corresponding Work Item permission.

The Edit Subitems Permissions page defaults to the permissions on the container item. If the permissions are changed for subitems, those changes are not retained on this page once the changes are applied.

Chapter 3

Searching Livelink

Livelink's searching capabilities provide a way to find information stored in Livelink that is relevant to you. You can locate Documents, Folders, Discussions, and other Livelink items. A search can be as basic as finding Documents that are similar to a Document in a Workspace. You can also create more complex searches using *Queries*. A Query is a Livelink item that stores search criteria and display options for results.

This chapter covers the following topics:

Note: This chapter contains only information about the basics of Search. For advanced searching topics, see "Searching Livelink" in the "Retrieving Information" section of the *Livelink User Online Help.*

Finding Similar Documents

Finding Documents that are similar to one in a Workspace or on the Search Result page is the most basic way to search Livelink. Finding similar Documents provides an efficient way to find Documents based on a certain topic. For example, on the Search Result page, searching for Documents similar to one of the top results may be faster than browsing all of the results for Documents on a certain topic.

A search for similar Documents returns Livelink Documents with content (including titles) that is similar to the original Document. For example, if you search for Documents similar to a Microsoft Word document that describes a certain Project, results may include other Microsoft Word documents that discuss the same Project. Results may also include Documents that mention one of the main elements of the Project.

To find similar Documents:

- In a Workspace or on the Search Result page, click a Document or Text Document's **Functions** icon, and then choose **Find Similar**.

Using the Livelink Search Bar

The Livelink search bar provides fast and convenient searching capability on almost every Livelink page. The search bar can be fully customized by a Livelink Administrator, so the options that appear at your Livelink site may differ from the ones discussed in this topic. For more information about the Livelink search bar at your site, contact your Livelink Administrator.

The following Livelink items may appear on the search bar.

Table 3-1: The Search Bar

Livelink Item	*Function*
Type drop-down list	Allows you to switch between Full Text, Nickname, and Natural Language Query searches. For more information about nicknames, see "Assigning Nicknames to Items," page 49. For more information about Natural Language Queries, see "Searching with Natural Language Queries," page 71.
Component drop-down list	Allows you to specify the nature of your search. For example, when running a Natural Language Query search, you can choose between Livelink aware and keyword extraction. This drop-down list is visible on the search bar only when it is enabled by your Livelink Administrator.
From Here drop-down list	Allows you to specify the Livelink slice (for example, the Enterprise Workspace) that you want to search. You can search from the Folder or Workspace you are currently in, or you can search the entire enterprise.
Detailed Search button	Expands the Detailed Search window on the current page. This button is visible on the search bar only during a Full Text search and when it is enabled by your Livelink Administrator. For more information about Detailed Search, see "Searching with Detailed Search," page 67.
Advanced Search button	Opens the Advanced Search page. This button is visible on the search bar only when it is enabled by your Livelink Administrator.

When you use the Livelink search bar, the search terms that you specify are retained in the search bar on the Search Result page. This allows you to refine the terms and run a new search without leaving the Search Result page. For samples of Livelink search bar Queries, see "Sample Queries" in the "Searching Livelink" section of the *Livelink User Online Help*.

Note: Because you use the Livelink Search page to construct more complex Queries, the search terms that you specify on the Livelink Search page are not retained in the search bar on the Search Result page.

To search using the search bar:

1. Specify your search criteria by clicking options in the **Type**, **Component**, and **From Here** drop-down lists.
2. Type your Query in the text field on the search bar.
3. Click the **Go** button.

Searching with Detailed Search

Detailed Search allows you to use some of the advanced search options to customize your search, without having to use the Livelink Search page. For example, you can search using a basic Query; search within a specific location in Livelink, such as a Folder, Project, or Workspace; search for files created by a particular Livelink user; or search for files modified on a particular date.

If Detailed Search has been enabled by your Livelink Administrator, you can access it from any Livelink page on which the search bar is available. To find out if Detailed Search is enabled at your site, contact your Livelink Administrator.

To search using Detailed Search:

1. On the Livelink Search bar, click the **Full Text** search option in the **Type** drop down list.
2. Click the **Detailed Search** button on the search bar.
3. Type your Query in the **Look For** field in the **Full Text** section.

   Optionally, click **All Words**, **Any Words**, **Exact Phrase**, or **Complex Query** in the **Look For** drop-down list.
4. Specify your search criteria.
5. Click the **Search** button.

Note: The text in the **Type** drop-down list may be different from the default setting, depending on how your Livelink Administrator has configured the search bar. You must click the **Full Text** search option at your Livelink site to be able to access the **Detailed Search** button. For more information about the search bar, see “Using the Livelink Search Bar,” page 65.

Searching with Basic Queries

You can search Livelink by creating a basic Query that contains keywords. A basic Query can also contain a combination of keywords and other criteria that expands or narrows your search. When you create a basic Query, you can save it for reuse like any other Query. For information about other types of Queries, see "Searching with Natural Language Queries," page 71, or see "Searching with Complex Queries" in the "Searching Livelink" section of the *Livelink User Online Help*.

Working with Keywords

Keywords are the words or phrases that you specify when searching for Livelink items that contain those words or phrases. For example, if you specify the keywords *business plan model*, Livelink can return a list of Livelink items that contain all three words, any of these words, or the exact phrase. If two or more keywords are enclosed in quotation marks, Livelink searches for the exact phrase as it appears within the quotation marks.

Expanding a Search

You *expand* a search when you want to search for Livelink items that contain words that are related to the words in your Query. Selecting a modifier lets you specify the type of related words to include in the search. For example, you can select a modifier that returns Livelink items containing words that sound like the keyword you specify. You can also select a modifier that returns Livelink items containing words that are related to the stem form of the specified keyword. For example, searching for words related to the stem form of the keyword *interface* returns a list of Livelink items that contain words such as *interface*, *interfaces*, *interfacing*, and *interfaced*.

When you use keywords with a modifier, the modifier is applied to all the words. When you search for an exact phrase, the modifier is applied to the phrase as a whole. In a complex Query, the modifier is applied to all the words in that Query that are not Livelink Query Language keywords. For more information about the Livelink Query Language, see "Searching with Complex Queries" in the "Searching Livelink" section of the *Livelink User Online Help*.

Narrowing a Search

You *narrow* a search by increasing the number of specific criteria that Livelink uses in a search. These criteria include the use of Boolean operators (AND, OR, and NOT: basic logic that changes how the keywords are related) and the option of searching within an item's content, metadata, or both. Other types of search criteria include the following advanced options: scope, system attributes, custom attributes within a Category, and XML types. The following table describes the available search criteria.

Table 3-2: Search Criteria

Criteria	*Lets you. . .*
Within All	Search the information contained within each Livelink item, such as within the text of Documents as well as the metadata information that your Livelink Administrator has made searchable.
Within Content	Search the information contained within each Livelink item, such as within the text of Documents.
Within Metadata	Search the information accompanying each Livelink item, such as the date that a Document was added to Livelink.
Boolean Operators	Precisely define the relationships between search criteria in your Query. For example, if *plan* and *test* are keywords, searching for *plan* AND *test* returns Livelink items that contain both *plan* and *test*; *plan* OR *test* returns Livelink items that contain *plan*, or *test*, or both; *plan* NOT *test* returns all Livelink items that contain *plan*, but do not contain *test*.
Scope	Search a particular collection (slice) of Livelink information. For example, choose the Help slice (if available) to search the *Livelink User Online Help* for information.
System Attributes	Search for Livelink items with certain attributes. For example, you can search for all Livelink items with a Created By attribute that is set to a certain user. For more information about Categories, see “Working with Categories and Attributes” in the “Retrieving Information” section of the *Livelink User Online Help*.
Categories	Search for Livelink items with certain custom attributes within a Category. For example, you can search for all Livelink items that have their Company Name custom attribute set to Open Text and their File Number custom attribute set to 93761634 within the Company Information Category. For more information about Categories, see “Working with Categories and Attributes” in the “Retrieving Information” section of the *Livelink User Online Help.*
XML types	Search for XML content in Livelink. To search for XML content in Livelink, you choose an XML DTD that defines the XML types (XML regions) that you want to search, and then you choose the XML types that you want to search. For information about XML types, see “Understanding XML Types” in the “Searching Livelink” section of the *Livelink User Online Help*.
Browse Livelink	Search a specific area in Livelink, such as a particular Folder, Project, or Workspace.

Specifying System Attributes

Many system attributes appear by default on the Livelink Search page, but some must be enabled by a Livelink Administrator in order to appear. For example, a Livelink

Administrator can enable the OTDocumentRating attribute so that users can search for Documents with a particular rating. A Livelink Administrator will often enable new attributes when a Livelink module or a new version of Livelink is installed. For more information about attributes, see “Working with Categories and Attributes” in the “Retrieving Information” section of the *Livelink User Online Help*.

The following table contains examples of attributes a Livelink Administrator may enable.

Note: The attributes are shown with their default names; however, your Livelink Administrator may change these names.

Table 3-3: Attribute Examples

Attribute	***Lets you. . .***
OTDocumentRating	Search for Livelink items with a certain rating.
OTDocumentSynopsis	Search for Livelink items with certain information in their synopses.
OTDocumentUserComment	Search for Livelink items with certain information in their comments.
OTDocumentUserExplanation	Search for Livelink items with certain information in their explanations.
OTProjectStatus	Search for Livelink Projects with a certain Project status.

For more information about ratings, synopses, comments, and explanations, see “Working with Ratings” in the “Using Recommendations and Ratings” section of the *Livelink User Online Help*. For more information about Project status, see “Exploring the Project Workspace” in the “Collaborating with Others” section of the *Livelink User Online Help*.

Searching with Natural Language Queries

You can search Livelink with a Natural Language Query, which you enter as a question or one or more lines of text. Livelink then determines from your Query what criteria and keywords to search for, and runs the search. When you create a Natural Language Query, you can save it for reuse like any other Query. For information about saving Queries, see "Working with Saved Queries" in the "Retrieving Information" section of the *Livelink User Online Help*.

Understanding Natural Language Queries

There are two types of Natural Language Queries: *Livelink aware* and *keyword extraction*.

- Livelink aware is best used for Queries that involve people, dates, and Livelink item types, such as Documents and Folders. Livelink aware uses a rule set to determine this context by retrieving information about file types and attributes from the entered text. For example, if you ask *Where are the Word documents for the Chicago conference?*, Livelink aware recognizes *Word* as the Microsoft Word MIME type and narrows the search to look for *Chicago* and *conference* in Microsoft Word documents only.
- If no specific information about people, dates, or Livelink item types is available, keyword extraction is the best way to issue a Natural Language Query. It identifies the top five words or phrases from the Query that are not *stop words* (words that add no semantic value to a sentence, such as *a*, *and*, and *the*), and then searches for items that contain some or all of those five words or phrases. For example, if your Query is *Where can I find a presentation about collaboration software?*, Livelink returns a list of items that contain some or all of the following words: *presentation*, *collaboration*, and *software*.

Note: Livelink aware only functions within the Enterprise Data Source. If Livelink aware is specified for a Query involving another data source, or a Query that does not include people, dates, or Livelink item types, Livelink automatically reissues the Query in keyword extraction mode.

Both types of Natural Language Queries treat Queries surrounded by quotation marks as *exact phrase* searches. This means that Livelink searches with the exact Query you type in quotation marks and does not apply standard Natural Language Query rules, such as eliminating stop words from the search. If you want to search for a document that has a multiword title, you must type quotation marks around all the words for Livelink to recognize them as a single title. Multiword summaries and descriptions also use this principle.

Some Natural Language Queries, such as those involving dates, use additional logic when forming and running searches. When you search for documents created approximately two weeks ago, Livelink creates an intelligent date range and uses it to run the search. For example, searching for *documents about dogs created two weeks ago* searches a date range that includes the day before the date that falls exactly two weeks ago, and the two days that fall after it. In this way, Livelink creates a four-day date range in which to run the search.

The same logic applies to searches that refer to months and years, with the date ranges increasing, depending on the time frame you search.

To search using a Natural Language Query:

1. Choose **Search** on the **Tools** menu.
2. On the Livelink Search page, click **Complex Query** in the **Look For** drop-down list.
3. Type your Query in the **Full Text** field.
4. Click the **Search** button.

Chapter 4

Using Recommendations and Ratings

Recommendations and ratings help you to identify useful information in Livelink. They also give you a method with which to provide feedback about the information you find, which then adds to the accuracy of future recommendations.

This chapter covers the following topics:

Working with Recommendations

Recommendations are lists of items or users that Livelink has determined might be of interest to you. Recommendations appear on the Recommendations page and on the Project Overview page for each Project.

There are three types of recommendations:

- *Popular*, based on system input from all users
- *Personal*, based on your activity in the system
- *History*, a record of your recent activity

Each type of recommendation consists of one or more components, which are a subset of a recommendation type.

Table 4-1: Recommender Components

Type	Component	Description
Popular	What's New	The items that were most recently added to Livelink.
	Most Active Items	The most active items in Livelink, based on the number of times the items have been accessed.
	Top Picks	The Documents in Livelink that are most highly ranked, based on three criteria: overall rating from users, how recently the Documents were created or modified, and the number of times the Documents have been rated.
Personal	People with Similar Interests	Users with similar browsing habits, based on the Documents that you and the other users have accessed.
	Documents of Interest	Documents accessed by users with similar interests.
History	Recently Visited Items	The items that you have most recently accessed.

Viewing Recommendations

You can view Popular, Personal, and History recommendations on your Recommendations personal reports page. Recommendations are also visible on the Project Overview page. Each Project contains the following components, with their scope limited to the project: Recently Visited Items, Most Active Items, Documents of Interest, and Top Picks. For more information about Project overviews, see "Exploring the Project Workspace," page 132.

To view recommendations:

1. Choose **Recommendations** on the **Personal** menu.
2. Click the tab that corresponds to the type of recommendation you want to view (for example, **History**).

Configuring Recommendation Components

You configure a recommendation component to adjust the number of items and item types (if applicable) that it displays. The list of item types that are available for you to select depends on the item types that your Livelink Administrator has made available.

To configure a recommendation component:

1. Choose **Recommendations** on the **Personal** menu.
2. Click the **Configure** icon  that corresponds to the recommendation component that you want to configure.
3. In the Configure window, specify the settings that you want.
4. Click the **Update** button.

Working with Ratings

Ratings are number-based evaluations of Documents in Livelink. Ratings are used by the system when making recommendations and are compiled as part of an item's properties. When you view an item's ratings, you can view a list of users who have viewed the item and a list of other items that these users have viewed.

Rating Items

You rate an item as part of a review, which can include a comment (the title of your review) and an explanation. For example, you might decide to give a Document a rating of 4 out of 5, and include the comment "Informative, but too long" and an explanation of why you feel the Document is too long. You can rate an item if you have the See Contents permission for it.

To rate an item:

1. In the Enterprise Workspace, click an item's **Functions** icon, and then choose **Rate It**.
2. On the **Ratings** tab of the item's Properties page, click a rating for the item in the **Rating** drop-down list.

   Optionally, to include a comment or explanation with your rating, type text in the **Comment** or **Explanation** field.
3. Click the **Submit** button.

Tips: To remove your review for an item, submit a rating of **<None>**.

You can also access the **Ratings** tab on an item's Properties page by clicking an item's **Functions** icon, choosing **Properties**, and then choosing **Ratings**.

Editing Synopses

Another of the elements that are part of an item's properties is the ratings *synopsis*. The synopsis provides a brief description of the item, which you can edit if you have the Modify permission for the item and your Livelink Administrator has enabled user-editable synopses. If the item is a GIF or JPEG image, the synopsis also includes a thumbnail version of the image. Your Livelink Administrator must enable thumbnail viewing in order for the image to be visible. For information about whether thumbnail viewing is enabled at your Livelink site, contact your Livelink Administrator.

To edit a synopsis for an item:

1. Click an item's **Functions** icon, and then choose **Rate It**.
2. On the **Ratings** tab of the item's Properties page, click the **Synopsis** icon .
3. In the Edit the Synopsis window, modify the synopsis.
4. Click the **Update** button.

Note: The **Synopsis** icon appears only if your Livelink Administrator has granted users permission to edit synopses and if you have the Modify permission for the item.

Tip: You can also access the **Ratings** tab on an item's Properties page by clicking the item's **Functions** icon, choosing **Properties**, and then choosing **Ratings**.

Chapter 5

Managing Documents and Records

You can use Livelink in a variety of ways to help you store, manage, recover, and reuse the information contained in your organization’s documents.

This chapter covers the following topics:

Working with Documents and Text Documents

A *Document* is any electronic file that you upload from your computer to the Livelink database. Examples of Documents include spreadsheets, memos, HTML pages, images, and audio files. Using Livelink functions, you work with Documents by adding them to Livelink, editing their contents, opening them for viewing, and managing versions and generations.

A *Text Document* is a Document whose content is written in plain text; for example, a document created in Notepad. Using Livelink functions, you work with Text Documents using many of the same functions that you use with other Document types; for example, you can add them to Livelink and edit their contents.

This section covers the following topics:

Adding and Editing Documents

There are two ways to add Documents to Livelink:

- By uploading a document file that already exists on your computer
- By creating a new Document in Livelink

Note: Creating a new Document requires that you use the Microsoft Internet Explorer Web browser.

When you add an existing document to Livelink, you can specify a name and description, apply Categories and attributes, and choose the location in Livelink where you want to add it. When you add a new Document to Livelink, you select a document type, specify information, and then compose its contents in an external application. Document types that you can add are set by the Livelink Administrator, but can include Microsoft Word, Excel and PowerPoint files. Once you add the new Document, a blank Version opens in its associated desktop program where you can compose its contents.

If you have the proper permissions, you can add a Document as a major or minor Version of the original. If you do not have permission to add a Document as a Version, the choice to add a Document as a major or minor Version does not appear. For more information about advanced versioning, see "Working with Versions," page 90.

Note: For information about using a Macintosh computer with a Netscape browser to add Documents to Livelink, see Adding Macintosh Files to Livelink.

If you use the Microsoft Internet Explorer, you can also edit Documents in Livelink. You do this by starting an *edit session*. An edit session does the following things for you automatically:

- Reserves the Document and downloads a temporary file to your computer.
- Opens the temporary file in its associated desktop program, so that you can modify it.

When you are finished making changes, you end the edit sesssion. Ending an edit session involves choosing one of the following options:

- Saving the changes to Livelink (as a minor Version of the original Document)
- Saving the changes to the local file on your computer, leaving the Document on Livelink as it is
- Discarding the changes altoether.

Note: When you are working in a Livelink edit session, do not close the Livelink Web browser until you are finished editing the Document. If you close the Web browser without saving your changes, they may be lost.

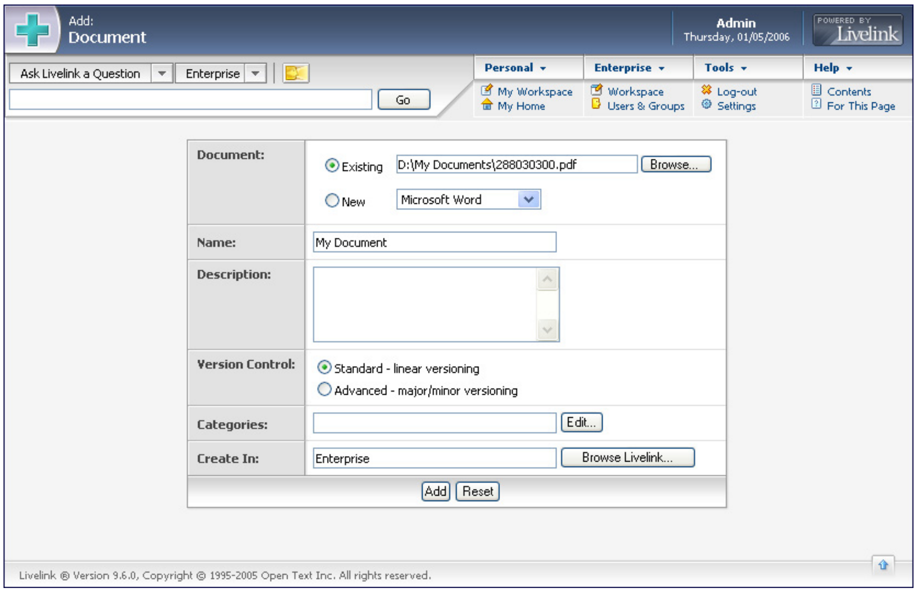
Tip: Refresh the Web browser when you end an edit session, so that you can see your changes in Livelink.

Adding a Document

To add a Document:

1. Click **Document** on the **Add Item** menu.
2. In the **Document** section of the Add Document page, click the **Existing** radio button.

3. Type a name for the Document in the **Name** field.



Note: The **Existing** radio button displays only on Internet Explorer browsers.

4. Click the **Browse** button to navigate to the file you want to add, and then click the **Open** button.
5. If you are using a Macintosh computer and the file you are composing has a relevant resource fork that you need to preserve, select the **MacBinary (set before selecting a file)** check box.
6. In the **Version Control** section, choose a type of versioning by clicking the **Standard - linear versioning** or **Advanced - major/minor versioning** radio button.
7. Specify any other general item settings.
8. Click the **Add** button.

Note: For more information about adding Macintosh files, see “Adding Macintosh Files to Livelink,” page 45.

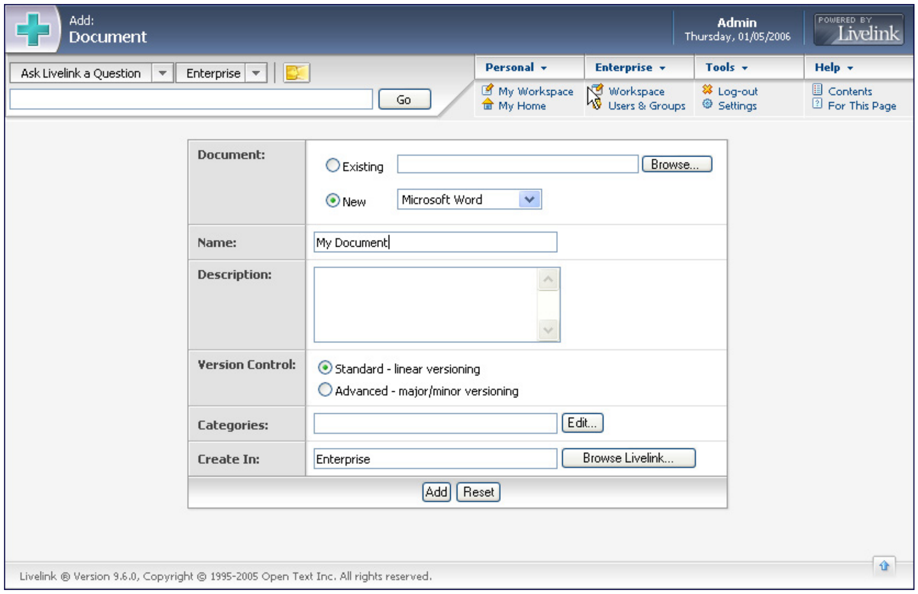
Tip: You can also add a document by clicking the **Add Document** button.

Adding a New Document

To add a new Document:

1. Click **Document** on the **Add Item** menu.

2. In the **Document** section of the Add Document page, click the **New** radio button, and then click the document type that you want to add in the drop-down list.



Note: The New radio button displays only on Internet Explorer browsers.

3. Type a name for the Document in the **Name** field.
4. Type a name for the Document in the **Name** field.
5. In the **Version Control** section, specify a type of versioning by clicking the **Standard - linear versioning** or **Advanced - Major/Minor** versioning radio button.
6. Specify any other general item settings.
7. Click the **Add** button.
8. Add content to the document that opens in its associated desktop program, and then close it.
9. In the Finish Edit dialog box, click the **Save the Changes to Livelink** radio button, and then click the **OK** button.

Note: For more information about adding Macintosh files, see “Adding Macintosh Files to Livelink,” page 45.

Tip: You can also add a document to Livelink by clicking the **Add Document** button on a Workspace page.

Editing a Document

To edit a Document:

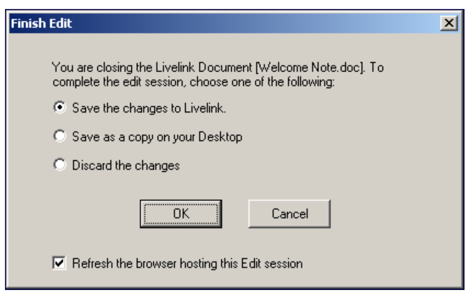
1. Click a Document's **Functions** icon, and then choose **Edit**.

   Note: The Edit command is available only on Internet Explorer.

2. When the Document opens in its associated desktop program, edit its contents, and then close it.

3. In the Finish Edit dialog box, click one of the following radio buttons:
   - **Save the changes to Livelink**, which adds the modified Document to Livelink as a Version of the original.
   - **Save as a copy on your Desktop**, which lets you specify a new name for the Document and save it to your computer.
   - **Discard the changes**, which closes the Document without saving it.

   Optionally, select the **Refresh the browser hosting this Edit session** check box.

4. Click the **OK** button.

Tip: You can also edit a Document by clicking its **Edit** link.

Adding and Editing Text Documents

Livelink provides a built-in text editor that you can use to compose and edit Text Documents in Livelink. The text editor provides a convenient way to add simple text files to Livelink without having to first compose them in a separate application.

To add an existing plain-text document from your computer to Livelink, you must add it as a *Document*. Livelink recognizes it as a plain-text file and treats it as a Text Document from then on. When composing or adding a Text Document, you can provide a description of the Text Document, modify its Categories and attributes, and add it to a different container, as you can when you add other items. For more information about adding items, see "Adding Items," page 43.

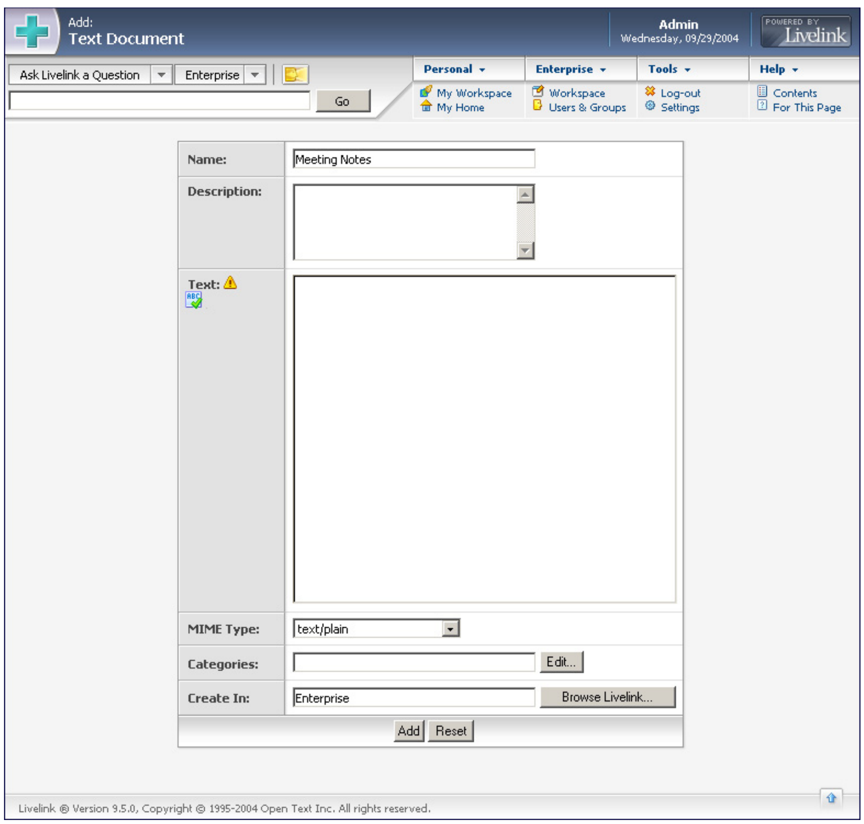
When you edit a Text Document, Livelink opens it in the Text Editor, regardless of how it was added. The Text Editor works with existing Documents or Text Documents that are in plain-text format, including HTML, XML, and SGML. The default MIME type assigned by the system is text/plain. For information about MIME types, see “Understanding MIME Types,” page 87.

Note: Netscape Navigator will not accept text files larger than 8 kilobytes. If you are using Netscape Navigator, any text that you enter beyond this limit will be lost when you save the Text Document to Livelink.

Adding a Text Document

To add a Text Document:

1. Click **Text Document** on the **Add Item** menu.
2. On the Add Text Document page, type a name for the Text Document in the **Name** field.



3. Type the contents of the Text Document in the **Text** field.

   Optionally, click the **Check Spelling** icon  to check for spelling errors.

4. Specify any other general item settings.

5. Click a MIME type for the text document in the **MIME Type** drop-down list. (The default value is text/plain).
6. Click the **Add** button.

Editing a Text Document

To edit a Text Document:

1. Click a Text Document's **Functions** icon, and then choose **Edit**.
2. On the Edit page, type your changes in the text field.

   Optionally, click the **Check Spelling** icon  to check for spelling errors.
3. Click the **Add Version** button to commit your changes.

Accessing Documents and Text Documents

There are several ways you can access Documents in Livelink, depending on what you want to do, your level of permissions, and how Livelink is configured. Generally, you can view the contents of, make changes to, download, and reserve or unreserve a Document.

You can view a Document as a Web page using your Web browser, which allows you to quickly view the contents without concern for the Document's formatting. You can also open a read-only copy of a Document in its associated desktop program. This enables you to view the Document's content, format, and layout as meant to appear.

Notes: Viewing a Document as a Web page is a feature that your Livelink Administrator must enable.

Files that do not contain text (for example, audio files) cannot be viewed as Web pages.

You download Documents from Livelink when you want to save them to your computer or make changes. When you download a Document, you can open it in its associated desktop program, or save it to your computer. If you download a Document in order to make changes to it, you should reserve the Document so that no one else can make changes to it at the same time. For more information about reserving a Document, see "Working with General Items," page 40.

For information about accessing a Document or Text Document so that you can edit it, see "Adding and Editing Documents," page 80, and "Adding and Editing Text Documents," page 84.

Note: Livelink modules can affect how you view, open, and download Documents.

If enabled by your Livelink Administrator, you can also access Documents through the *Document Overview page*. The Document Overview page provides information about the Document, including a description and Version information, and enables you to perform a number of functions on the Document. For more information, see "Understanding the Document and Version Overview Pages," page 88.

Viewing a Document

The View as Web Page function is available only if enabled by your Livelink Administrator.

To view a Document:

- Click the Document's **Functions** icon, and then choose **View as Web Page**.

Opening a Text Document

To open a Text Document:

- Click the Text Document's **Functions** icon, and then choose **Open**.

Downloading a Document or Text Document

To download a Document or Text Document:

1. Click the Document or Text Document's **Functions** icon, and then choose **Download**.
2. Save the file to your computer.

Understanding MIME Types

In most cases, Livelink can automatically identify the type of any file added to its database. Whenever a Document is added to Livelink, its MIME type is stored as a part of its metadata. *MIME*, which stands for Multipurpose Internet Media Extensions, is a standard for describing file types (such as text, image, or audio). For example, the MIME type *application/msword* denotes a Word file. In Livelink, these files have the Microsoft Word icon . Plain-text Documents that you add to Livelink are denoted by the Text Document icon . Files whose MIME type is not recognized are denoted by the Document icon .

Other common MIME types are:

- application/pdf
- audio/x-wav
- image/jpeg
- text/richtext
- video/mpeg

For information about adding Documents and Text Documents, see "Adding and Editing Documents," page 80, and "Adding and Editing Text Documents," page 84.

Understanding the Document and Version Overview Pages

The Document Overview and Version Overview pages provide information about a Document or Document Version stored in Livelink, including a description and Version information, and enable you to perform a number of functions on the Document or Version.

The Document Overview Page

By Default, you are directed to a Document Overview page when you click a Document's item name link, or an item's short link in an e-mail. This page is also accessible through a Document's **Functions** menu. The Document Overview page enables you to perform the following functions:

- Open a Document. For more information, see "Accessing Documents and Text Documents," page 86.
- Download a Document. For more information, see "Accessing Documents and Text Documents," page 86.
- E-mail a link to a Document. For more information, see "Assigning Nicknames to Items," page 49.
- Edit a Document. For more information, see "Adding and Editing Documents," page 80.
- Add Versions. For more information, see "Working with Versions," page 90.
- Access previous Versions. For more information, see "Working with Versions," page 90.
- Add a rating to a Document. For more information, see "Working with Ratings," page 76.
- Apply Notifications to a Document. For more information, see "Using Notifications" in the "Communicating News and Updates" section of the *Livelink User Online Help*.
- Access a Document's Properties page. For more information, see "Viewing and Modifying Item Properties," page 40.

The functions available to you on the Document Overview page are based on your permissions and the level of versioning (standard or advanced) set by the Livelink Administrator. Advanced versioning changes the options available to you, depending on whether the Document's latest Version is a major or minor Version. For example, if the most recent Version of a Document is a minor Version, you cannot edit the associated major Version; you will only be able to edit and add Versions to the current minor Version. For more information about standard and advanced versioning, see "Working with Versions," page 90.

Note: Advanced-versioning Documents will be available to read-only users through the Document Overview page, only if a major Version exists.

The Version Overview Page

By default, you are directed to a Version Overview page when you click a Version's link on the **Versions** tab of a Document's Properties page. It is also accessible through a Version's **Functions** menu. The Version Overview page provides a description of the Version, and enables you to perform a number of functions on the Version. These functions include:

- Open a Version. For more information, see "Working with Versions," page 90.
- Download a Version. For more information, see "Working with Versions," page 90.
- Access a Version's Properties pages. For more information, see "Viewing and Modifying Item Properties," page 40.

Managing Versions and Generations

The ability to preserve and maintain multiple versions of items is known as *version control*. Version control allows you to preserve and maintain multiple Versions of items. When you make changes to an existing item, Livelink stores the modified item as a new Version of the original item.

A *Generation* is an item that points to a specific Version (usually a previous Version) of another item and can be stored in any Livelink container. Making a Generation also protects a Version by preventing it from being modified or deleted.

Versions and Generations, therefore, serve as records of an item's state over time. They keep a record of what changes were made, when they were made, and who made them.

This section covers the following topics:

- "Working with Versions," page 90
- "Working with Generations," page 98

Working with Versions

The purpose of creating a Version in Livelink is to preserve an existing item whenever it is modified. Since versioning is governed by permissions, only users with the proper persmissions can manually add a Version to an item. For more information about permissions, see "Managing Permissions," page 59.

Items that can have Versions are called *versionable* items. Livelink maintains Versions for the following item types:

- Documents
- Compound Documents
- Text Documents
- Categories
- Workflow Maps
- Project Templates
- Extensible Markup Language Document Type Definitions (XML DTDs)
- Custom Views

By default, Livelink retains an unlimited number of previous Versions, but you can limit the number of Versions on an item-by-item basis. When the *Version limit* is reached, Livelink automatically purges an item's oldest Version when a new Version is added. You can also purge Versions manually.

You can lock a Version to prevent it from being deleted or purged. Livelink does not include locked Versions in the maximum number of Versions to be retained.

Standard and Advanced Versioning

Livelink uses two types of versioning systems: *standard versioning* and *advanced versioning*. Standard versioning is used for all versionable Livelink item types; advanced versioning is used for Documents and Text Documents. Advanced versioning is enabled by default, but can be disabled by your Livelink Administrator. If advanced versioning is disabled, standard versioning will be used for all Livelink items, including Documents and Text Documents.

Notes: Compound Documents have their own kinds of Versions called *Releases* and *Revisions*. For more information, see "Working with Releases and Revisions," page 103.

For item-specific information about Versions, see "Working with Categories" in the "Retrieving Information" section of the *Livelink User Online Help*, "Working with Workflow Maps" in the "Implementing a Business Process as a Workflow" section of the *Livelink User Online Help*, and "Working with Project Templates" in the "Collaborating with Others" section of the *Livelink User Online Help.*

Using Standard Versioning

Standard versioning, also known as *linear versioning*, displays Versions as whole integers (1, 2, 3, 4, etc.). When you add a new versionable item to Livelink, it becomes both an object in the system and a Version of that item. If you then add a Version to the item, it becomes the current Version and represents the object in Livelink. For example, when you add a spreadsheet to Livelink, it exists as a Document and the first Version of the Document. If you add a modified version of the spreadsheet, it becomes the Document object and the second Version. The original spreadsheet is preserved in Livelink as the Document's first Version.

When changes to an item are made, Livelink automatically adds a new Version. You can also add a new Version of an item when you unreserve it. For more information about reserving and unreserving Livelink items, see "Working with General Items," page 40.

Note: Versions of an item or Document cannot be reserved. If you want to prevent other users from making changes to or downloading a Version of an item or Document, you must lock it.

Accessing Standard Versions

You can quickly access and work with previous Versions of any versioned item from the **Versions** tab of the item's Properties page. Every Version has its own **Functions** icon, which you can use to open, view, download, delete, lock, or unlock a Version.

Note: When you delete an item that has a standard Version, you delete the current Version *and* all previous Versions.

Using Advanced Versioning

Advanced versioning, also known as *major/minor versioning*, allows users to add a Document (or a Document sub-type, such as a Text Document) to Livelink as *a major Version or minor Version* when the Document is created. A Document's Version Properties page displays major Versions as whole numbers (1.0, 2.0, 3.0, etc.) and minor Versions as decimals (0.1, 0.2, 0.3, etc.). When you add a Document, it is added as minor Version number 0.1. If a Version is added to an existing Document, its Version number will be the next minor Version number. For example, if the latest Version number of a Document is 1.2, and a Version is added, the latest Version will become 1.3.

Note: Advanced versioning is enabled by default; however, your Livelink Administrator can disable advanced versioning.

If advanced versioning is not enabled, Versions are automatically added using standard versioning. When advanced versioning is disabled on an existing item that has major or minor Versions associated with it, the Version numbers display using standard versioning (i.e. 1, 2, 3, 4, etc.). However, existing major or minor Version numbers are preserved in case advanced versioning is re-enabled at a later time.

Accessing Advanced Versions

The functions that you can perform on an advanced Version depends on the permissions you have for that particular item. Like standard Versions, every major or minor Version of a Document has its own **Functions** icon, which you can use to open, view, download, delete, and lock Versions. If a Document is reserved, you can add a major or minor Version when you unreserve the Document. The Table 5-2 describes the permissions that are required to perform certain functions on Versions.

Table 5-2: Permissions Required to Perform Functions on Versions

Permission	*Available Functions*
See Contents	See major Versions
Reserve	See major and minor Versions Add minor Versions
Delete Versions	See major and minor Versions Delete minor Versions
Delete	See major and minor Versions Delete major and minor Versions
Edit Permissions	Add major and minor Versions Promote Versions Modify Version control settings (change between standard and advanced versioning)

Users with the Edit permission for a Folder or Project can force all Documents added to that container to use advanced versioning. If this option is selected, the option to choose a type of versioning for the Document you are adding does not appear. The option to force Documents to use advanced versioning can be applied to a specific item, only Folders and Projects within the item, or the specific item and the Folders and Projects within the item. Also, users with the Edit permission can *promote* minor and major Versions of a Document to its next major Version. Major Versions cannot be *demoted* to minor Versions.

You can view an item's Versions on the Version Properties page. The information you see on this page depends on your permissions:

- If you have full access to an item (or the Edit permission), the Version Properties page displays all major and minor Versions.
- If you have limited access to an item (or the See Contents permission), the Version Properties page displays only major Versions.

Your Livelink Administrator can also allow users to view *only* major Versions of a Document. If this option is enabled, and no minor Versions for the Document exist, either you will be able to see the Documents (without being able to access them) or the Documents will be hidden altogether. By default, users with access to only major Versions can see that minor Versions exist, but cannot view, open, download, or perform any other functions on them.

As with standard versioning, Livelink retains an unlimited number of previous Versions, but you can limit the number of Versions that are retained on an item-by-item basis. When a Document with major and minor Versions reaches its Version limit, Livelink automatically purges the oldest minor Version. You can purge Versions manually, in the same way that you purge standard Versions. Your ability to delete or purge major and minor Versions of a Document is controlled by permissions. In order to delete minor Versions, you must have the Delete Versions permission for the Document; in order to delete major Versions, you must have the Delete permission for the Document.

Since locked Versions cannot be deleted, you can prevent major and minor Versions from being purged or deleted by locking them. Also, major Versions and Versions that are referenced by Generations cannot be purged.

The behavior of certain functions in Livelink, such as moving or copying an item, is affected by advanced Versioning. For more information about the functions that are affected by advanced versioning, see "Understanding Advanced Versioning Behavior," page 95.

Adding a Version

To add a Version:

1. Click an item's **Functions** icon, and then choose **Add Version**.
2. Click the **Browse** button, navigate to the file, and then click the **Open** button.

3. If you are using a Macintosh computer and the file you are uploading has a relevant resource fork that you need to preserve, select the **MacBinary (set before selecting a file)** check box.

   Optionally, click the **Add this as a minor Version** or **Add this as a major Version** radio button.

   Note: This option only appears for Documents and Text Documents, and only if the Document uses advanced versioning.

4. Specify any other general item settings.
5. Click the **Add Version** button.

Note: For more information about adding Macintosh files, see "Adding Macintosh Files to Livelink," page 45.

Unreserving a Document and Adding a Version

To unreserve a Document and add a Version:

1. Click a reserved Document's **Functions** icon, and then choose **Unreserve**.
2. On the Unreserve page, select the **Add New Version** check box.
3. In the **File** section, click the **Browse** button, navigate to the file you want to add as the latest Version, and then click the **Open** button.

   Optionally, if the **Versioning** section is available, click the **Add this as a minor Version** or **Add this as a major Version** radio button.

4. Specify any other general item settings.
5. Click the **Submit** button.

Working with a Version

To manage Versions:

- Click an item's **Functions** icon, choose **Properties**, choose **Versions**, and then do any of the following on the **Versions** tab of the item's Properties page:

To . . .	*Do the following . . .*
Open a Version	Click a Version's **Functions** icon, and then choose **Open**.
View a Version	Click a Version's **Functions** icon, and then choose **View as Web Page**.
Download a Version	Click a Version's **Functions** icon, choose **Download**, and then save the file to your computer.
Delete a Version	Click a Version's **Functions** icon, choose **Delete**, and then click the **OK** button.
Lock or unlock a Version	Click a Version's **Functions** icon, and then choose **Lock** or **Unlock**.

Note: Locked Versions cannot be deleted.

Setting a Version Limit

To set a Version limit:

1. Click an item's **Functions** icon, choose **Properties**, and then choose **Specific**.
2. On the **Specific** tab of the item's Properties page, type an integer greater than 0 in the **Max. Versions** field.
3. Click the **Update** button.

Tip: To have Livelink keep only the newest Version of the item, type `1` in the **Max. Versions** field.

Purging Versions

To purge Versions:

1. Click an item's **Functions** icon, choose **Properties**, and then choose **Versions**.
2. On the **Versions** tab of the item's Properties page, type an integer greater than 0 in the **Purge all versions except the most recent** field.
3. Click the **Purge Versions** button.
4. Click the **OK** button.

Understanding Advanced Versioning Behavior

In general, advanced versioning rules apply to Documents and Text Documents. However, some Livelink features are affected by advanced versioning, as described in the following sections.

Moving and Copying Advanced Versioning Documents

When you try to move or copy an advanced versioning Document, the Versions that are moved or copied depend on your permissions on that particular item. Requiring permissions prevents users from easily gaining access to minor Versions. The following permissions apply when move and copy operations are performed on a Document with major or minor Versions:

- See Contents, applies to copy operations. If a user with the See Contents permission copies a Document with advanced versioning enabled, the copy of the Document will only contain the major Versions of the Document.
- Reserve or Delete Versions, applies to copy operations. If a user with the Reserve or Delete Versions permission copies a Document with advanced versioning enabled, the copy of the Document will contain all Versions of the Document.

- Delete, applies to move operations. If a user with the Delete permission moves a Document with advanced versioning enabled, the original Document and all its Versions are moved.

Setting Notification on Advanced Versioning Documents

As with standard versioning items, you can set Notification for Documents that use advanced versioning. However, users that can only see major Versions of the Document will only receive Notification related to major Versions (for example, a major Version is added or a Version's status changes). If Notifications are set for an item with no major Versions, and the user can only see major Versions, the user will not receive Notification. However, once a major Version exists, the user will receive a Notification.

For more information about Notifications, see “Using Notifications” in the “Communicating News and Updates” section of the *Livelink User Online Help*.

Understanding Appearances with Advanced Versioning

Appearances are treated as standard Documents, and can therefore have major and minor Versions. Users can view major and minor Versions of Appearances, provided they have the proper permissions.

For more information about Appearances, see “Working with Appearances” in the “Customizing Livelink” section of the *Livelink User Online Help*.

Understanding Advanced Versioning with Compound Documents

The Release and Revision functions of a Compound Document will operate using the current major Version of the Document. If a Document within a Compound Document uses advanced versioning, the Release and Revision functions will use the current major Version of the Document.

If a Document within a Compound Document uses advanced versioning and has no major Version, the Release and Revision functions will not include that Document.

For more information about Compound Documents, see “Working with Compound Documents,” page 100.

Attaching Advanced Versioning Documents to Topics and Replies

You can only attach Documents with major Versions to a Discussion Topic or Reply. If a minor Version is the most recent Version of the Document, and a major Version exists, then the most recent major Version of the Document is attached. If no major Version exists for a Document, and you try to attach that Document to a Topic or Reply, you will receive an error message stating that you cannot add the Document because no major Version for the Document exists.

For more information about Discussions, see Chapter 7, “Communicating with Discussions”.

Using Project Templates with Advanced Versioning Documents

Since Projects can contain advanced versioning Documents, you must be able to create a Project Template that contains advanced versioning Documents. If the Project Template includes an advanced versioning Document, only the Versions that the user has permission to see are included in the Template. If an advanced versioning Document is included in the Template and the user specifies that all Versions of the Document are to be included when the Template is instantiated, the resulting Document will use advanced versioning and include all major and minor Versions of the Document. If a user instantiates the Template and specifies that only the current Version be included, the resulting Document will use advanced versioning and include the current major Versions from the Template.

For more information about Project Templates, see “Working with Project Templates” in the “Collaborating with Others” section of the *Livelink User Online Help*.

Converting a Standard or Advanced Version

To convert a standard or advanced Version:

1. Click a Document’s **Functions** icon, choose **Properties**, and then choose **Specific**.
2. On the **Specific** tab of the Document Properties page, click one of the following radio buttons in the **Versions** section:
   - **Standard - linear versioning**
   - **Advanced - major/minor versioning**
3. Click the **Update** button.

Promoting a Version

To promote a Version:

1. Click a Document’s **Functions** icon, choose **Properties**, and then choose **Versions**.
2. On the **Versions** tab of the Document Properties page, click a Version’s **Functions** icon, and then click **Promote to Major**.
3. On the Promote to Major page, specify any other general item settings, and then click the **Submit** button.

Modifying Version Control Settings

To modify Version control settings:

1. Click a Folder or Project’s **Functions** icon, and then choose **Version Control**.
2. In the **Version Control** section on the Version Control page, click one of the following radio buttons:
   - **Allow users to choose between standard linear versioning and advanced major/minor versioning when adding Documents**

- **Always use advanced major/minor versioning**

3. In the **Apply To** section, click the radio button for the types of items to which you want the versioning option to apply.
4. Click the **Submit** button.

Working with Generations

You use Generations to make certain Versions of an item more visible and accessible in Livelink. Like a Shortcut, a Generation points to a particular Version of an item, usually a previous Version. If you have an old Version of an item that is still needed, you can make a Generation against that Version and store it in any container or Workspace. This prevents the Version that it points to from being modified or deleted.

Generations are treated as distinct items; they are not associated with the item (or Version of the item) that they are created from. Generations make the Versions they point to easier to find and work with because they can be stored in any appropriate container.

The Generation Functions Menu

The **Functions** menu of a Generation is divided into two submenus:

- The **Original** submenu contains functions that you have permission to perform on the *original item* (the Version that the Generation points to). The functions on the **Original** submenu do not affect the Generation.
- The **Generation** submenu contains functions that you have permission to perform on the Generation. The functions on the **Generation** submenu do not affect the original item.

Making a Document Generation

To make a Document Generation:

1. Click a Document's **Functions** icon, and then choose **Make Generation**.
2. On the Add Generation page, type a name for the Generation in the **Name** field.

   Optionally, click a Version number in the **Version** drop-down list to point the Generation to a previous Version.
3. Specify any other general item settings.
4. Click the **Add** button.

Opening a Generation

To open a Generation:

- Click a Generation's **Functions** icon, choose **Generation**, and then choose **Open**.

Accessing a Version from its Generation

To access a Version from its Generation:

- Click a Generation's **Functions** icon, choose **Original**, and then choose a function.

Working with Compound Documents

A Compound Document is a container designed for treating a group of Documents as a whole and providing them with a specific order and structure. For example, you can use a Compound Document to manage:

- Individual word processor files that represent the chapters of a book
- A group of HTML and image files that make up a Web site
- A proposal consisting of spreadsheets, charts, and a cover letter

This section covers the following topics:

- "Adding and Modifying Compound Documents," page 100
- "Accessing Compound Documents," page 101
- "Working with Releases and Revisions," page 103

Adding and Modifying Compound Documents

You add items to a Compound Document the same way you add them to other containers. However, Compound Documents can contain only the following item types:

- Documents
- Text Documents
- Compound Documents
- Shortcuts to and Generations of Documents, Text Documents, and other Compound Documents

One of the advantages of Compound Documents is that many users can work on different components at the same time. Working on the Documents in a Compound Document is just like working on Documents elsewhere in Livelink; you can use the samefunctions, including reserve and download.

When adding a Compound Document to Livelink, you can provide a description of the Compound Document, modify its Categories and attributes, and add the Compound Document to a different container. For more information about adding items, see "Adding Items," page 43.

Each item you add to a Compound Document is numbered sequentially, based on the order in which it is added. However, you can change the order of items at any time. In addition, a Compound Document can include a *master document*, which you can designate when you reorganize the items in the Compound Document. The master document could be the table of contents of the book, the index page of the Web site, or the cover letter of a report. The master document is always the first element of a Compound Document and the topmost element of its structure.

Livelink does not require sequential numbering—it is perfectly valid to have items numbered 1, 17, and 339. When you reorganize the items, you can have them automatically renumbered to remove any gaps in the sequence.

Versions of Compound Documents are called *Releases* and *Revisions*. For more information, see "Working with Releases and Revisions," page 103.

Adding a Compound Document

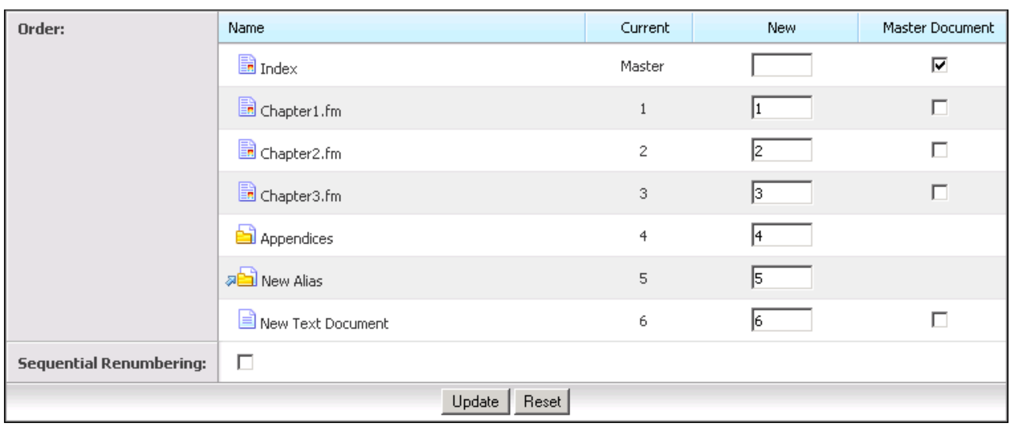
To add a Compound Document:

1. Click **Compound Document** on the **Add Item** menu.
2. On the Add Compound Document page, type a name for the Compound Document in the **Name** field.
3. Specify any other general item settings.
4. Click the **Add** button.

Reorganizing Items in a Compound Document

To reorganize items in a Compound Document:

1. Click a Compound Document's **Functions** icon, and then choose **Reorganize**.
2. On the Reorganize Contents page, type a number in the **New** field of each item whose order you want to change.



   Optionally, select the **Master Document** check box for the item you want to designate the master document.

   Optionally, select the **Sequential Renumbering** check box to resequence the other items in the Compound Document.

3. Click the **Update** button.

Accessing Compound Documents

With long or complex Compound Documents, it can be difficult to manage the overall structure by looking at the contents one level at a time. Therefore, Livelink enables you to view an Outline of the Compound Document. The Outline displays the entire structure of a Compound Document on one page, in sequence and according to its hierarchy. It also provides a **Functions** menu for each item within the Compound Document, which enables you to work with each item from there. For example, you can open a Document to see its contents.

You can reserve a Compound Document to maintain version control. However, unlike reserving a Document, reserving a Compound Document does not lock or reserve the items it contains. These items can still be modified by other users, although reserving a Compound Document does prevent other users from changing its structure and sequence or adding and deleting items.

Accessing a Compound Document Outline

A Compound Document Outline shows the hierarchical sequence of items inside a Compound Document.

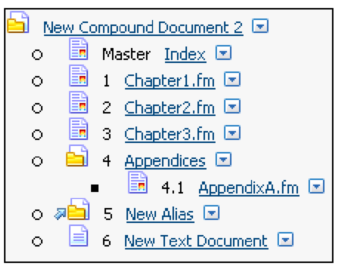


Figure 5-a: Outline of the Items Inside a Compound Document

To access a Compound Document or Compound Document Outline:

- Click a Compound Document’s **Functions** icon, and then choose **Open** or **Outline**.

Reserving a Compound Document

To reserve a Compound Document:

1. Click the Compound Document’s **Functions** icon, and then choose **Reserve**.
2. On the Reserve page, do one of the following:
   - To reserve the Compound Document for yourself only, click your user name in the **Reserve By** field.
   - To reserve the Compound Document for any group to which you belong, click the group name in the **Reserve By** field.
3. Click the **Submit** button.

Unreserving a Compound Document

To unreserve a Compound Document:

1. Click the **Functions** icon of a reserved Compound Document, and then choose **Unreserve**.
2. On the Unreserve page, specify any other general item settings.

   Optionally, add a new version of the item by selecting the **Add New Version** check box, and then specifying the file you want to add.
3. Click the **Submit** button.

Working with Releases and Revisions

While Livelink maintains Versions of the items that a Compound Document contains, Compound Documents have their own kinds of Versions called *Releases* and *Revisions*. Each Release and Revision is a static version of a Compound Document, created at a certain point in the past. For example, if you have a Compound Document that represents a software manual, you might create a Release when the manual is published. You can continue to work on the original Compound Document because the Release represents the manual that is currently being given to your customers. Releases are numbered 1.0, 2.0, 3.0, and so on.

A Revision is similar to a Release, but is suitable when you want to preserve only minor modifications to a Compound Document and do not need to create a new Release. Revision numbering is based on Release numbering. Revision 1.2 is the second Revision of the first Release, and so on.

You access and work with Releases or Revisions on the **Releases** tab of a Compound Document's Properties page. You can lock a Release or Revision to prevent it from being deleted. You can also make a Generation of a Compound Document. For information about Generations, see "Working with Generations," page 98.

Creating a Release

To create a Release:

1. Click a Compound Document's **Functions** icon, and then choose **Create Release**.
2. On the Create Release page, type a name in the **Release Name** field.
3. Click the **Submit** button.

Note: You cannot create a Release if the Compound Document or any of its subitems are reserved by another user.

Creating a Revision

To create a Revision:

1. Click a Compound Document's **Functions** icon, and then choose **Create Revision**.

2. On the Create Revision page, type a name in the **Revision Name** field.
3. Click the **Submit** button.

Note: You cannot create a Revision if the Compound Document or any of its subitems are reserved by another user.

Opening or Viewing a Release or Revision

To open or view a Release or Revision:

1. Click a Compound Document's **Functions** icon, choose **Properties**, and then choose **Releases**.
2. On the **Releases** tab of the Compound Document's Properties page, click the Release or Revision's **Functions** icon, and then choose **Open** or **Outline**.

Locking or Unlocking a Release or Revision

To lock or unlock a Release or Revision:

1. Click a Compound Document's **Functions** icon, choose **Properties**, and then choose **Releases**.
2. On the **Releases** tab of the Compound Document's Properties page, click the Release or Revision's **Functions** icon, and then choose **Lock** or **Unlock**.

Deleting a Release or Revision

To delete a Release or Revision:

1. Click a Compound Document's **Functions** icon, choose **Properties**, and then choose **Releases**.
2. On the **Releases** tab of the Compound Document's Properties page, click a Release or Revision's **Functions** icon, and then choose **Delete**.
3. Click the **OK** button.

Note: Locked Releases or Revisions cannot be deleted.

Chapter 6

Working with Users and Groups

Every Livelink user is a member of at least one group, and may be a member of many groups. A group can contain *subgroups* (other groups within a group). Organizing users into groups is essential to setting up a Livelink system that is easy to use and maintain. A well-organized user community helps the Livelink Administrator to effectively:

- Administer system privileges
- Manage permissions on items in Livelink
- Manage work assignments, such as Tasks from Workflow steps and Task Lists
- Set up default Notification reports for new users

This chapter covers the following topics:

Finding Users and Groups

While the ability to create and edit users and groups is a privilege given to selected users, all users have the ability to search for other users and groups and view information about them. Finding a user or group is also necessary when performing certain other functions, such as assigning a Task to a user or adding a user to a Project. The most common way to find a user or group is to run a search.

You can search for a user by name, log-in name, or e-mail address. For groups, you can only search by group name. The value you supply for the search parameter is not case sensitive, and it can be only the first part of a name. For example, if you search for Last Name with the value *jo*, your search results will include *Johnson* and *Jones*. If you leave the **starts with** field blank, Livelink retrieves all users or groups in the system. For large organizations, such a search will take a long time and tie up system resources.

To find a user or group:

1. Choose **Users & Groups** on the **Enterprise** menu.
2. On the Users and Groups page, click a search parameter in the **Find** drop-down list.

3. Type a search term in the **starts with** field.
4. Click the **Find** button.

Working with Users

Livelink helps you work with others in a number of different ways. Most users are limited to finding information about other users, to communicate or collaborate with them. If you have the proper privileges, you can also edit user information and add or delete users. You view and work with user information on the Users and Groups page.

Viewing User Information

Livelink presents user information on the following pages:

- General Info, which contains the user's log-in name, password, and primary contact information. If you have the privilege to edit a particular user, you also see what system privileges that user has on the General Info page.
- Personal Info, which contains such information as a photograph, biographical information, and expanded contact information. All information on this page is optional.

You can view your own general and personal user information on the My Profile page. For more information, see "Viewing Personal Report Pages," page 33.

Adding Users and Editing User Information

If you have the proper privileges, you can edit the information on a General Info or Personal Info page. The **Edit** icon indicates that you have the privilege. All users can edit their own personal information.

When you add a user, Livelink requires you to provide a user name for the account and to specify a Department group for the new user. In addition, you need to specify what system privileges the user will have.

Deleting a user or group is a fairly straightforward procedure. However, before you delete a user, go to the user's My Workspace, and clean up the contents by deleting unwanted items and transferring important items to other locations. It is important to do this before you delete the user because it is difficult to access the My Workspace of a deleted user.

System Privileges

Privileges are assigned to a user account at the time it is added. Unlike permissions, which operate on an item-by-item basis, privileges operate on a system-wide basis. The following table describes the system privileges in Livelink.

Table 6-1: Livelink Privileges

Privilege	*Description*
Log-in Enabled	Activates the user account.

Table 6-1: Livelink Privileges

Privilege	***Description***
Public Access Enabled	Gives the user access to any item in the system for which the Public Access permission is activated.
Create/Modify Users	Enables the user to add users and modify or delete the users he or she creates. **Note:** If you have only the Create/Modify Users privilege, you can add users in only those groups for which you are the creator or leader. To add a user *anywhere in Livelink*, you need the Create/Modify Groups privilege as well as the User Administration Rights privilege.
Create/Modify Groups	Enables the user to add groups and modify or delete the groups he or she creates.
User Administration Rights	Enables the user to add, modify, and delete *any* user or group.
System Administration Rights	Gives the user full access to Livelink's administration functionality, if the user knows the administration password. This privilege also provides access to all items in the system, without filtering for permissions. This privilege does not include the ability to administer users or groups.

Note: When you create or edit a user, you cannot grant privileges that you do not have yourself. For example, you cannot grant the System Administration Rights privilege unless you have that privilege yourself.

Viewing User Information

To view user information:

1. Find the user whose information you want to view.
2. Click one of the following links in the **Actions** column:
   - **View**, which opens the General Info page.
   - **Groups**, which displays information about the groups to which a user belongs.
   - **Browse**, which opens that user's My Workspace.

Editing User Information

To edit user information:

1. Find the user whose information you want to edit.
2. Click the user's **Edit** link in the **Actions** column.

3. On the General Info page, add or modify general user information, including password settings and system privileges.
4. Click the **Personal** tab, and then add or modify any user information.
5. Click the **Update** button.

Tip: To view and edit your own user information, choose **My Profile** on the **Personal** menu.

Adding a User

To add a user:

1. Choose **Users & Groups** on the **Enterprise** menu.
2. On the Users and Groups page, click **User** on the **Add Item** menu.
3. Type a unique log-in name for the user in the **Log-in Name** field.
4. Click the name of the Department to which you want to add the user in the **Department** drop-down list.
5. Type a password to log in to Livelink in the **Password** field, and then type it again in the **Verify Password** field.
6. Click the **Submit** button.

To . . .	*Do the following . . .*
Specify additional information about the user	Type information in the **First Name**, **Middle Initial**, **Last Name**, **Title**, **E-mail**, **Phone**, **Fax**, and **Office Location** fields.
Specify a time zone for the user	Click a time zone in the **Time Zone** drop-down list.
Grant privileges to the user	Select any of the appropriate check boxes in the **Privileges** section.

Deleting a User

To delete a user:

1. Find the user you want to delete.
2. Click the user's **Edit** link in the **Actions** column.
3. Click the **Delete User** button.
4. In the dialog box, click the **OK** button.

Working with Groups

A user can belong to one group or many. Your primary group in Livelink is called your *Department*. You can view information about a group and its members.

If you have the proper privileges, you can perform group administration tasks. For example, as the creator of a group, you have the ability to edit the group or delete it entirely, whether you are a member of the group or not (you do not need not to be a member of a group that you create). You can also add groups as members of another group. A group within a group is known as a *subgroup*.

To help you administer the groups you create, you have the option to set a *group leader*. A group leader is someone to whom you give full control over the group, with the ability to add and remove users from the group, delete the group, pass the group leadership to someone else, or unset (give up) his or her leadership.

Note: By default, there is no group leader, which means that only the creator of the group and other users with proper privileges can edit the group. A group leader can be a user or a subgroup, and there can be only one leader at a time.

Viewing Group Information

To view group information:

1. Find the group whose information you want to view.
2. Click the group’s **View** link in the **Actions** column.

Tip: To view your own group information, choose **My Groups** on the **Personal** menu.

Editing Group Information

To edit group information:

1. Find the group whose information you want to edit.
2. Click the group’s **Edit** link in the **Actions** column.
3. On the Edit Group page, add or modify group information.

   Optionally, click the name of a user or group in the **Current Group** section, and then click the **Set as Group Leader** button to set that user or group as the group leader.
4. Click the **Done** button.

Tip: To unset the group leader without setting a new one, click the name link of the group leader in the **Current Group Member**s section, and then click the **Unset as Group Leader** button.

Adding a Group

To add a group:

1. Choose **Users & Groups** on the **Enterprise** menu.
2. On the Users and Groups page, click **Group** on the **Add Item** menu.
3. Type a unique name for the new group in the **Group Name** field.
4. Click the **Submit** button.

Adding a User or Subgroup to a Group

To add a user or subgroup to a group:

1. Find the group to which you want to add a user or subgroup.
2. On the Users and Groups page, click the group's **Edit** link in the **Actions** column.
3. On the Edit Group page, find the user or group that you want to add.
4. Select the user or group's **Add to Group** check box.
5. Click the **Submit** button.
6. Click the **Done** button.

Removing a User or Subgroup From a Group

To remove a user or subgroup from a group:

1. Find the group from which you want to delete a user or subgroup.
2. On the Users and Groups page, click the group's **Edit** link in the **Actions** column.
3. On the Edit Group page, click the name link of the user or group that you want to remove.
4. Click the **Remove from Group** button.
5. Click the **Done** button.

Note: You cannot remove a user from his or her Department.

Deleting a Group

To delete a group:

1. Find the group you want to delete.
2. Click the group's **Edit** link in the **Actions** column.
3. Click the **Delete Group** button.

4. Click the **Done** button.

Note: You cannot delete a group that is being used as a Department.

Chapter 7

Communicating with Discussions

Discussions provide you with a method to share thoughts and information in a public forum. For example, you can use them to resolve issues and make decisions.

This chapter covers the following topics:

Adding and Viewing Discussions

A Discussion is a container for Topics and Replies. You can add a Discussion anywhere in Livelink where you have the permission to add items. When you add a Discussion, you can provide a description of it, modify its Categories and attributes, and add it to a different container. For more information, see "Working with General Items," page 40.

When you open a Discussion, you decide how you want information to appear in that Discussion by modifying filter settings. For example, you can specify the following settings:

- **Period From**, which lets you view Topics and Replies based on a time period.
- **Display**, which lets you choose one of the following display options:
  - **Nested View**, which displays a multilevel, indented format for all Topics and Replies to show their relationship to each other.
  - **Report View**, which displays the Topic and Reply information in column format. The report view can be sorted by type, subject, author, creation date, and number of threads (*unread*[*total*]).
- **Show**, which lets you choose one of the following view options:
  - **Topics Only**, which displays new Topics only.
  - **Unread Only**, which displays only Topics you have not previously opened.
  - **All**, which displays all Topics and Replies.

For more information about changing filter settings for all Discussions you have access to, see "Changing Discussion Settings," page 119.

Adding a Discussion

To add a Discussion:

1. Click **Discussion** on the **Add Item** menu.
2. On the Add Discussion page, type a name for the Discussion in the **Name** field.
3. Specify any other general item settings.
4. Click the **Add** button.

Tip: You can also add a Discussion by choosing **Discussions** on the Personal menu, and then clicking the **Create Discussion** icon.

Opening a Discussion

To open a Discussion:

1. Click a Discussion's **Functions** icon, and then choose **Open**.
2. Click a time frame in the **Period From** drop-down list.

3. Click one of following in the **View** drop-down list:
   - **Nested View**
   - **Report View**
4. Click a time frame in the **Period From** drop-down list.
5. Click one of the following radio buttons in the **Show** field:
   - **Topics Only**
   - **Unread Only**
   - **All**

Working with Topics and Replies

To participate fully in a Discussion, you must have the proper permissions. If you have the Read permission on a Discussion, you can open Topics and Replies posted by others. To post Topics and Replies in a Discussion, you need the Write permission.

When you post a Topic or Reply, you can add a file attachment, which is denoted by the paper clip icon. Advanced versioning Documents can only be attached if the Document is a major Version. For more information about attaching advanced versioning Documents to a Topic or Reply, see “Understanding Advanced Versioning Behavior,” page 95.

After you read a Topic or Reply, the system marks the item as read. You can manually mark all Topics and Replies as read even though you have not actually read them. Also, because you are the owner of every Topic or Reply that you add to a Discussion, you can delete them at anytime.

Posting a Topic

To post a Topic:

1. Click a Discussion’s **Functions** icon, and then choose **Open**.
2. On the Discussion page, click the **Post Topic** icon.
3. Type a title for the Topic in the **Subject** field.
4. Type your topic in the **Comments** field.
5. Click the **Submit** button.

To . . .	*Do the following . . .*
Attach an item from Livelink	Click the **Browse Livelink** button, navigate to the item, and then click its **Select** link.
Attach a file from your desktop	Click the **Browse** button, navigate to the file, and then click the **Open** button.

Opening a Topic or Reply

To open a topic or reply:

1. Open a Discussion.
2. On the Discussion page, click the name of the topic or reply that you want to open.
3. Click any of the active links on the **Open Item Navigation** bar:
   - **Previous Topic**, which displays the topic that was posted prior to the current item.

- **Previous Unread**, which displays the unread item posted prior to the current item.
- **Previous**, which displays the item posted prior to the current item.
- **Next**, which displays the item posted after the current item.
- **Next Unread**, which displays the unread item posted after the current item.
- **Next Topic**, which displays the topic posted after the current item.

4. To open an attachment, do one of the following in the **Attachments** section:
   - To open the attachment in Livelink as HTML, click its name.
   - To open the item using an external application, click its **Open** link.
   - To save a copy of the attachment to your workstation, click its **Download** link.

To Reply to a Topic

To reply to a topic:

1. Open a Discussion.
2. On the Discussion page, click the link of the Topic (or an existing Reply) to which you want to reply.
3. Click the **Post Reply** button.
4. Type a title for the Reply in the **Subject** field.
5. Type your reply in the **Comments** field.
6. Click the **Submit** button.

To . . .	*Do the following . . .*
Attach an item from Livelink	Click the **Browse Livelink** button, navigate to the item, and then click its **Select** link.
Attach a file from your desktop	Click the **Browse** button, navigate to the file, and then click the **Open** button.

Marking Topics and Replies as Read

To mark Topics and Replies as read:

1. Open a Discussion.
2. On the Discussion page, click the **Mark Read** icon.

Tip: You can also mark all Topics and Replies as read by clicking the Discussion’s **Functions** icon, and then choosing **Mark Read**.

Deleting a Topic or Reply

To delete a topic or reply:

1. Open a Discussion.
2. On the Discussion page, click the link for the Topic or Reply you want to delete.
3. Click the **Delete Topic** icon or the **Delete Reply** icon .
4. In the dialog box, click the **OK** button.

Changing Discussion Settings

Livelink gives you the option of changing filter settings for all Discussions that you have permission to open. Filter settings apply to all Discussions, but you can change some filters for an individual Discussion. For more information about changing settings for an individual Discussion, see “Adding and Viewing Discussions,” page 114.

To make changes to filter settings for all Discussions, you modify the following parameters:

- **Posting Preference**, which uses the beginning of a Topic’s context as the subject of a Reply.
- **Reply Preference**, which places the contents of Topics and Replies in quotation marks as you compose a Reply.
- **View Item Options**, which shows an entire thread in context as you compose a Reply.

To change your default Discussion settings:

1. Choose **Settings** on the **Tools** menu.
2. On the My General Settings page, click the **Discussion** tab.
3. On the My Discussion Settings page, click an option in the **Default Period From** drop-down list.
4. In the **Default View** drop-down list, click either **Nested View** or **Report View**.
5. In the **Filter Preference** section, click one of the following radio buttons:
    - **Topics Only**
    - **Unread Only**
    - **All**
6. Click the Update button.

To . . .	*Do the following . . .*
Use an excerpt from the beginning of untitled topics and replies as the subject	Select the **Use Content Summary as Subject** check box in the **Posting Preference** section.
Display the contents of the entire thread on the Post Reply page	Select the **Quote Comments** check box in the **Reply Preference** section.
Display the Threads in Context section below the text of the current topic or reply	Select the **Show Threads in Context** check box in the **View Item Options** section.

Chapter 8

Using Polls

A Poll enables users to participate in the decision-making process by putting specific issues to a vote.

A Poll is an attachable item type, which means you can attach it to a News object, a Discussion Topic or Reply, or a Task, giving other users immediate access to the Poll.

This chapter covers the following topics:

Adding and Administering Polls

You create a Poll by adding it to any location in Livelink where you have the Add Items permission.

When you add a Poll, you can provide a description for it, modify its Categories and attributes, and add it to a different container. For more information, see “Working with General Items,” page 40.

Setting Up a Poll

After you add a Poll to a container, you must edit it to add questions and answers, select voting methods, and define other Polling options. By default, only one question text field and one answer choice text field appear, but you can add additional fields if necessary. A Poll can contain up to 20 questions and 20 answer choices for each question.

You must specify one of the following voting methods for each question:

- **Radio Button**, which allows voters to select only one answer per question.
- **Checkbox**, which allows voters to select multiple answers per question.

In addition, you can enable voters to add anonymous comments to a Poll and see the current results before they vote. You can also add an image with alternate text to the Poll. Voters will see the image on the Poll page when they vote or view results.

Note: You can edit a Poll after users have cast votes; however, all votes that have been cast will be lost.

Adding a Poll

To add a Poll:

1. Click **Poll** on the **Add Item** menu.
2. On the Add Poll page, type a name for the Poll in the **Name** field.
3. Specify any other general item settings.
4. Click the **Add** button.

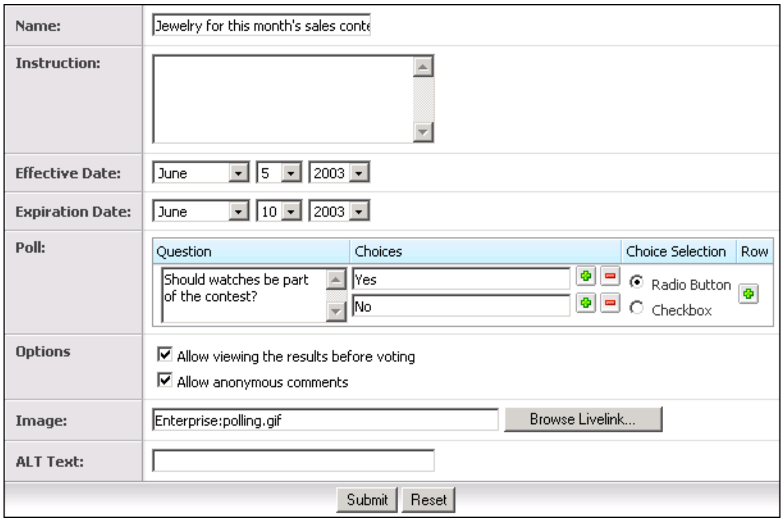
Editing a Poll

Warning: When you edit a Poll after votes are cast, all existing votes are deleted.

To edit a Poll:

1. Click a Poll’s **Functions** icon, and then choose **Edit**.
2. On the Edit Poll page, type a name for the Poll in the **Name** field.

3. Click a start and end date for the Poll in the **Effective Date** and **Expiration Date** drop-down lists.



4. In the **Poll** section, do the following:
   - Type a question in the **Question** text box.
   - Type answer choices for the question in the **Choices** text boxes.
   - In the **Choice Selection** area, select one of the following radio buttons for each question to determine the method of voting:
     - **Radio Button**
     - **Checkbox**
5. Click the **Submit** button.

To . . .	*Do the following . . .*
Add instructions to help voters complete the Poll	Type them in the **Instructions** field.
Add or delete questions and answers	In the **Poll** section, click the **Add** or **Remove** buttons.
Allow voters to view results or add comments	In the **Options** section, select the **Allow viewing the results before voting** or the **Allow anonymous comments** check box.
Add an image to the Poll	In the **Image** section, click the **Browse Livelink** button, navigate to an image, and then click its **Select** link.
Add alternate text to the image	Type a description in the **ALT Text** field.

Voting and Viewing Results

A Poll's creator chooses a voting method for each question when setting up a Poll. When radio buttons appear beside answer choices, you may select only one answer choice for each question; if check boxes appear, you may select multiple answer choices for each question.

A Poll's creator can also enable you to add comments to the Poll. If this option is enabled, a text box for comments and suggestions appears on the Voting page. Users with access to the Poll can read all comments, but cannot identify the person who added them.

Viewing Poll Results

By default, you can view a Poll's results at any time after you cast your vote. You can view the current results of a Poll before you vote if the Poll's creator selected this option when setting up the Poll. If you cannot view a Poll's results, either no votes were cast or the Poll's creator did not enable this option.

If a Poll's creator selected the option that allows voters to add anonymous comments to the Poll, you can view the comments on the View Results page. If the **View Results** link does not appear when you vote, either comments have not yet been added to the Poll or they are not allowed.

Voting in a Poll

To vote in a Poll:

1. Click a Poll's **Functions** icon, and then choose **Open**.

   Optionally, click the **View Results** link at the top of the Poll page to view current results of the Poll.

2. On the Poll page, cast your vote by selecting check boxes or clicking radio buttons for each of your answers.

   Optionally, type comments in the **Comments** field.

3. Click the **Submit** button.

Viewing Poll Results

To view Poll results:

If . . .	*Do the following . . .*
You already voted	Click the Poll's **Functions** icon, and then choose **Open**.
You did not vote	Click the Poll's **Functions** icon, **choose** Open, and then click the **View Results** link on the Poll page.
You are the Poll's creator	Click the Poll's **Functions** icon, and then choose **View Results**.

Chapter 9

Working with Channels and News

Channels and News enhance collaboration by enabling you to publish timely information to everyone in your organization. A *Channel* is a type of container that stores News items. *News* is the information itself.

Communicating with News items offers the following benefits:

- The creator of a Channel can use permissions to control who can read and add News items to the Channel.
- You can add a News Player to a container or Workspace to "broadcast" information to users who browse those locations.
- The information in a News item is automatically indexed by the system, so that it becomes searchable.
- You can attach files to a News item to give users easy access to them.

This chapter covers the following topics:

Working with Channels

You can open a Channel to view its summary page, which displays the headlines and stories of all current News items it contains. On the summary page, users with the proper permissions can also add a News item to or remove one from the Channel. For more information about News items, see “Working with News,” page 128.

When adding a Channel to Livelink, you can provide a description of the Channel, modify its Categories and attributes, and add the Channel to a different container. For more information about adding items, see “Adding Items,” page 43.

Channels do not have permissions of their own; they inherit the permissions of the container to which they are added. This makes it easier for you to direct particular News items to the appropriate audience. For example, if you add a Channel to the Enterprise Workspace, all users can read the stories it contains. If you add a Channel to a Folder, its News items are available to users who have at least the See Contents permission on the Folder.

The News Player

To make News items more visible, you can “broadcast” them using the News Player. When enabled, the News Player appears in the upper left-hand corner of a Workspace or Folder. You enable a News Player by assigning one or more Channels to it. All assigned Channels that contain *current* News items (news that has not yet expired) will be active. The News Player continuously scrolls through the current headlines of all Channels assigned to it.

Note: The News Player does not display if there are no current News items in any of the Channels associated with it.

The News Channels Report Page

A list of all the Channels to which you have access appears on your News Channels report page. Every Project also has its own Project News page, which lists any Channels created within the Project or its Sub-Projects. For more information about personal and Project News reports, see “Viewing Personal Report Pages,” page 33, and “Project Report Pages,” page 133.

Note: You can make finding News items easier by creating additional tabs on a News page, and then organizing the Channels on each tab in a way that makes sense to you. For more information, see “Managing Report Page Tabs,” page 36.

Opening a Channel

To open a Channel:

- Click a Channel’s **Functions** icon, and then choose **Open**.

Adding a Channel

To add a Channel:

1. Click **Channel** on the **Add Item** menu.

   Optionally, click the **Browse Livelink** button on the Add Channel page, navigate to an image that you want to attach to the Channel, and then click its **Select** link.

   Optionally, type a description of the image (for users who are unable to see it) in the **ALT Text** field.
2. Specify any other general item settings.
3. Click the **Add** button.

Enabling a News Player

To enable a News Player:

1. Click a container or Workspace's **Functions** icon, choose **Properties**, and then choose **Presentation**.
2. In the **News Player** list, click each Channel whose headlines you want to assign to the News Player.
3. Click the **Update** button.

Note: The News Player displays only if there are unexpired News items in any of its assigned Channels.

Tip: Hold down the CTRL key while you click in the **News Player** list to select more than one Channel at a time.

Working with News

A News item consists of a headline and story, and effective and expiration dates to ensure that the News is timely. Also, it can contain an image and attachments. The paperclip icon indicates that a News item includes an attachment.

You access and work with News items from the summary page of the Channel in which they reside. For more information about Channels, see “Working with Channels,” page 126.

Note: News items can have multiple attachments. You can add one attachment from Livelink and one attachment from your computer when you first create a News item, but you can add more attachments later by editing the News item.

When adding News to a Channel, you can provide a description of the News item, modify its Categories and attributes, and add the News to a different container. For more information about adding items, see “Adding Items,” page 43.

Adding News to a Channel

To add News to a Channel:

1. Click **News** on the **Add Item** menu.
2. On the Add News page, type a name for the News item in the **Name** field.
3. Click an **Effective Date** and **Expiration Date** in the corresponding month, day, year, and time drop-down lists.
4. Type a headline for the News item in the **Headline** field.
5. Type the text of your News item in the **Story** field.

   Optionally, click the **Check Spelling** icon to check for spelling errors.
6. Specify any other general item settings.
7. Click the **Add** button.

Note: If you leave the **Headline** field blank, the text in the **Name** field is used as the headline.

Tip: You can also add News by clicking a Channel’s **Functions** icon, and then choosing **Make News**.

To . . .	*Do the following . . .*
Attach an image from Livelink to the News item	Click the **Browse Livelink** button in the **Image** section, navigate to an image that you want to attach to the News item, and then click its **Select** link.
Add a description of the image (for users who are unable to see it)	Type a description in the **ALT Text** field.

To . . .	*Do the following . . .*
Add an attachment from Livelink to the News item	Click the **Browse Livelink** button in the **Add Livelink Attachment** section, navigate to an item that you want to attach to the News item, and then click its **Select** link.
Attach a file from your computer to the News item	Click the **Browse** button in the **Add Desktop Attachment** section, navigate to the item, and then click the **Open** button.

Note: If you used the Make News function on an existing item in Livelink, the **Add Livelink Attachment** field is prepopulated with the item's location.

Opening a News Item

To open a News item:

- Do one of the following:
  - Click a News item's ***name*** link on a Channel summary page.
  - Click a headline on the News Player.

Editing a News Item

To edit a News item:

1. On the Edit Channel page, click a News item's **Functions** icon, and then choose **Edit**.
2. Modify any of the News item's settings.

Deleting a News Item

To delete a News item:

- On a Channel summary page, click a News item's **Functions** icon, and then choose **Delete**.

Chapter 10

Working with Projects

A Project is a container in Livelink that enables participants of a group to store information and items and to communicate daily activities with other participants. Project participants can add, share, manage, and organize items within a Project, such as Tasks and Documents.

This chapter covers the following topics:

Note: This chapter contains only information about the basics of Projects. For more advanced topics, see "Working with Projects" in the "Collaborating with Others" section of the *Livelink User Online Help.*

Exploring the Project Workspace

The Project Workspace is a container that stores information added by Project participants. Participants with the proper permissions can add any type of Livelink item to a Project or Subproject. A Project Workspace is similar to any other Livelink Workspace. However, you can customize a Project Workspace's appearance by specifying which page appears upon opening the Project, adding banner images and Project News, or by defining the navigation style for the Workspace. For more information about customizing a Project Workspace, see “Customizing Project Workspaces” in the “Collaborating with Others” section of the *Livelink User Online Help.*

The Project Overview Page

The Project Overview page gives each participant a personalized view of items in a Project. By default, every Project created in Livelink uses the Project Workspace as its start page. However, the settings can be changed so that the Project Overview page appears when a participant opens a Project.

The Project Overview Page is divided into sections, and each section can contain up to five items by default. The Project Coordinator can configure this page to display fewer sections or to change the number of items that appear within each section. For more information about changing the Project Overview page and making other customizations, see “Customizing Project Workspaces” in the “Collaborating with Others” section of the *Livelink User Online Help.* The following table describes the sections that appear on the Project Overview page by default.

Table 10-1: Project Overview Sections

Section	***Description***
Project Summary	Displays a Project’s current status and its start and target dates. The information that appears in this section is the information specified in the **Content** section when the Project was created. For information about editing a Project's content, see “Adding and Editing Projects” in the “Collaborating with Others” section of the *Livelink User Online Help*. The Status Indicator in the Project Summary section resembles a traffic light. It uses colors—green (On Target), yellow (Caution), red (Critical), and no color (Pending)—to provide the Project's current status. Project Coordinators and participants with the proper permissions can update this information on the Project Properties page.
Subprojects	Lists all subprojects, and includes their status and target dates.
Current News	Displays the current headlines and News for all active Channels within a Project.

Table 10-1: Project Overview Sections

Section	Description
Newest Polls	Displays the most recently added Polls. This section shows whether each Poll is open or closed, whether you have voted, and when the Poll closes.
Current Milestones	Lists a Project's current Milestones, which are sorted by date.
Late Tasks	Lists all Tasks in the Project with expired due dates.
Unassigned Tasks	Lists all Tasks in the Project that are unassigned. The Tasks are sorted by due date.
Recently Visited Items	Lists the items in the Project that you have most recently opened.
Most Active Items	Lists the items in the Project that have been opened more frequently than other items. Items in this section will contain a rating if a participant has recommended it. For more information, see Chapter 4: "Using Recommendations and Ratings".
Documents of Interest	Lists the documents in the Project that you and other participants have opened. These documents are sorted by the most frequently accessed to the least frequently accessed. Documents in this section can also contain a rating if a participant has recommended it. For more information, see Chapter 4: "Using Recommendations and Ratings".
Top Picks	Lists the items in the Project that have been accessed most frequently and have the highest ratings. For more information, Chapter 4: "Using Recommendations and Ratings".

Project Report Pages

A Project Workspace contains report pages that provide information specific to you or the Project. With the exception of the Project Outline report page, every report page functions the same way that your Personal report pages function. However, while a Personal report page contains information from throughout Livelink that is specific to you, a Project report page contains information from a Project.

Many of the Project report pages are divided into tabs, which allow you to organize them based on your own preferences. For more information about report page tabs, see "Managing Report Page Tabs," page 36.

The following table describes the report pages that are available for Projects.

Table 10-2: Project Reports Pages

Report Page Name	***This report page . . .***	***For more information, see . . .***
My Project Tasks	Lists all Tasks in the Project that are assigned to you.	Chapter 11: "Working with Tasks and Task Lists"
Project News	Lists all Channels inside the Project that you have permission to see.	Chapter 9: "Working with Channels and News"
Project Notification	Lists Notifications for events that occur within the Project. The Project Notifications can only be set up by the Project Coordinator or other participants with the proper permissions.	"Using Notifications" in the "Communicating News and Updates" section of the *Livelink User Online Help*.
Project Outline	Lists selected items in the Project or subproject in a tree-like structure. Participants can filter any of the following items that they want included in the list: Task Lists, Discussions, Channels, Documents, URLs, Compound Documents, and Folders.	"Working with Projects" in the "Collaborating with Others" section of the *Livelink User Online Help.*
Project Participants	Lists the name, log-in ID, department, and role for all participants in the Project.	"Managing Project Participants" under "Working with Projects" in the "Collaborating with Others" section of the *Livelink User Online Help.*
Project Reports	Lists all Queries and Snapshots in the Project, and the same LiveReports that appear in the LiveReports Volume. The LiveReports that appear on this page will not provide search results that are specific to the Project; these LiveReports search the entire Livelink system.	"Working with LiveReports" in the "Retrieving Information" section of the *Livelink User Online Help* and "Searching Livelink," page 63.

Accessing the Project Workspace

To Access the Project Workspace:

- Click a Project's **Functions** icon, and then choose **Open**.

Accessing the Project Overview Page

To access the Project Overview page:

- In a Project Workspace, choose **Overview** on the **Project** menu.

Viewing Project Report Pages

To view a Project report page:

- In a Project Workspace, choose a report on the **Project** menu.

Filtering Items on the Project Outline Page

To filter items on the Project Outline page:

1. In a Project Workspace, choose **Outline** on the **Project** menu.
2. In the **Include Item Types** section of the Project Outline page, select the check box for each item you want to appear in the outline, and then click the **Apply** button.

   Optionally, repeat the process to add other items to the outline.

Understanding Project Role Permissions

Project permissions are *role based*, which means participants' permissions are defined by their role in the Project. With the exception of Folders and items within a Folder, access to each item in a Project is governed by the participant's role, unless different permissions are set for a specific item. When a Project is created, Livelink automatically adds a Coordinator, Member, and Guest group for the Project. Each group is assigned a Project role and therefore receives a different level of permissions.

The following table describes the default permissions associated with each Project role.

Table 10-3: Role-Based Permissions

Role	***Description***
Guest	Guests can view items contained in a Project.
Member	Members can view and modify most items contained in a Project. Members can also add items, edit attributes, add and delete Versions, and reserve items contained in the Project. Members can also delete items they have created or added to the Project.
Coordinator	In addition to the Guest and Member permissions, Coordinators have full permissions on items within the Project. They can add or remove participants and change participant roles within the Project. Coordinators also determine how a Project appears, and can make customizations to the appearance when necessary. Projects can have more than one Coordinator.

Public Access to Projects

A Project Coordinator can enable Public Access, which gives all Livelink users Guest access to a Project. Livelink users who are not participants in a Project may have limited access to items inside a Project; their permissions are determined by the individual item. When Public Access is disabled for a Project, only users who have been added as participants can access the Project. Public Access is disabled by default.

Note: Changing a Project's Public Access status will affect the default permissions on objects that are added to a Project Workspace, but will not affect the permissions of any items that already exist in the Workspace.

Chapter 11

Working with Tasks and Task Lists

A *Task List* is a container that provides a simple way to manage and track the details of individual and collective work assignments. A Task List can contain Tasks, Milestones, and Task Groups, and it can be added anywhere in Livelink. Using Task Lists to manage assignments in a Project is especially useful, since it allows the members of a Project to remain informed of a Task's status.

This chapter covers the following topics:

Adding and Managing Tasks

Tasks enable you to provide a user or team of users with a priority or due date for an assignment and detailed instructions for completing an assignment. You must create a Task List before you add Tasks or Task Groups. You can add as many Tasks as necessary to a Task List, another Task, or a Task Group. A Task Group is used to organize a large number of related Tasks.

When you create a Task, you define attributes, such as assigning a Task to a user, assigning start and end dates, and adding Milestones. Milestones help track important deadlines throughout the course of a project or assignment. For more information about Milestones, see "Using Milestones," page 142.

The following table describes attributes that are common to Tasks, Task Groups, and Milestones.

Table 11-1: Common Task Attributes

Attribute	***Description***
Assigned To	The user or group to whom the Task is assigned. You do not have to assign a Task, but if you do, that user or group must have at least the Write permission.
Start Date	The date when the Task was created or the date work should begin.
Due Date	The date when the Task should complete. You can create a Task without specifying a due date. If a Task's due date has passed, the Task's Due Date attribute appears in red on the Task, Task List, and Assignment pages.
Priority	You can specify a Task as high, medium, or low priority.
Status	You can specify a Task as pending, in process, completed, cancelled, on hold, or as an issue. If the Task is completed, it still displays on the Task List.
Milestone	The Milestone that is associated with the Task.
Instructions	An optional attribute that allows you to specify instructions for completing the Task.
Comments	An optional attribute that allows assignees to add comments about the Task.
Attachments	This attribute appears in a separate section and is available only when a Task has Documents or other items attached to it, such as Polls, Shortcuts, and URLs.

If you do not define the attributes when you first add a Task, you can do so at a later time by editing the Task. You can edit single or multiple Tasks within Task Lists, Task Groups, and Milestones. When you add a Task List, Task, or Task Group, you can provide a description for the Task List or Task Group, modify Categories and attributes, and add the Task List to a different container. For more information, see "Working with General Items," page 40.

Your role as a Task creator or assignee determines the functions that you can perform on Tasks. The creator of a Task can modify all attributes; the user to whom a Task is assigned can view the Task, modify its status, and add or edit comments.

If a Task is part of a Project, all participants of the Project can view the Task's information; however, only the Project Coordinator can modify Task information.

You can access specific information about Tasks and Task assignees on various information pages. For example, you can access information about items in a Task List on the Task List Summary page. For more information about the details these pages provide, see "Viewing Information Pages," page 145. If you want to view or print a Task without scroll bars, text fields, or drop-down lists, enable Printer Friendly View.

Task Groups

A *Task Group* is a container inside a Task List that helps you organize a large number of related Tasks. Task Groups also allow you to perform functions on large groups of Tasks at one time. You can add multiple Tasks to a Task Group and multiple Task Groups to a Task List. Task Groups can be assigned to different users and given separate Milestones. When you add a Task Group, you can assign a Milestone to that group of Tasks. You can also modify the Task Group's Categories and attributes and add the Task Group's Task List to a different container.

Note: It is easier to add Tasks to a Task Group than to assign a Task Group to existing Tasks. If you plan to use a Task Group to organize a Task List, create the Task Group first, and then add Tasks.

Adding a Task List

To add a Task List:

1. Click **Task List** on the **Add Item** menu.
2. On the Add Task List page, type a name for the Task List in the **Name** field.
3. Specify any other general item settings.
4. Click the **Add** button.

Adding a Task

To add a Task:

1. Click a Task List, Task, or Task Group link.
2. On the Task List, Task, or Task Group page, click **Task** on the **Add Item** menu.
3. On the Add Task page, type a name for the Task in the **Name** field.
4. Click **High**, **Medium**, or **Low** in the **Priority** drop-down list.
5. Click a status in the **Status** drop-down list.
6. Specify any other general item settings.

7. Click the **Add** button.

To. . .	*Do the following. . .*
Assign a Task	Click the **Choose User or Group** icon, navigate to a user or group, and then click its **Select** link.
Specify start and due dates for the Task	Click a month, date, year, and time in the **Start Date** and Due Date drop-down lists.
Assign a Milestone to a Task	Click a Milestone in the **Milestone** drop-down list.
Add instructions or comments for the Task	Type information in the **Instructions** and **Comments** text boxes.

Adding a Task Group

To add a Task Group:

1. Click a Task List or Task Group link.
2. Click **Task Group** on the **Add Item** menu.
3. On the Add Task Group page, type a name for the Task Group in the **Name** field.

   Optionally, click a Milestone in the **Default Milestone for Tasks** drop-down list to assign a Milestone to the Task Group.
4. Click the **Add** button.

Editing a Task

To edit a Task:

1. Click a Task's **Functions** icon, and then choose **Edit**.
2. Modify any available attributes, and then click the **Update Task** button.

Editing Attributes of a Task, Task List, Task Group, or Milestone

To edit attributes of a Task, Task List, Task Group, or Milestone:

1. Click a Task, Task List, Task Group, or Milestone's **Functions** icon, and then choose **Edit Items**.
2. On the Edit Items page, select the check box for each attribute you want to modify in the **Change** column.
3. Select the check box for each item you want the changes to apply to in the **Apply To** column.
4. Click the **Update** button.

Enabling Printer Friendly View

To enable Printer Friendly View:

- Click a Task's **Functions** icon, and then choose **Printer Friendly View**.

Using Milestones

A Milestone represents a target date in a project’s development process, such as a deadline for completing certain tasks. Milestones help track the status and target dates for all Tasks assigned to a specific Milestone. You can view facts and statistics about Milestones and the Task Lists, Tasks, and users associated with Milestones on various information pages. For more information, see “Viewing Task List Information,” page 143.

You specify a target date for a Milestone when you add it. This is known as the *original* date and cannot be modified. You can assign and modify *current* and *actual* Milestone dates after the Milestone is created. The current date is the date specified as the target completion date; the actual date is the date that the task was or will be completed. When you add a Milestone, you can also provide a description of the Milestone, modify its Categories and attributes, and add the Milestone’s Task List to a different container. For more information, see “Working with General Items,” page 40.

The most efficient way to assign a Milestone to a Task or Task Group is to add it to the Task List before you add a Task or Task Group. However, you can assign Milestones or change previously assigned Milestones at a later time by editing the Milestone attribute. When you edit Tasks associated with a Milestone, you can modify any of the available attributes for the Task or Tasks to which the Milestone is assigned. For more information about attributes associated with Milestones and Tasks, see “Adding and Managing Tasks,” page 138.

Adding a Milestone

To add a Milestone to a Task List:

1. Click a Task List link.
2. On the Task List page, click **Milestone** on the **Add Item** menu.
3. On the Add Milestone page, type a name for the Milestone in the **Name** field.
4. Click a month, date, year, and time in the **Target Date** drop-down lists to specify the Task’s target completion date.
5. Click the **Add** button.

Assigning Milestone Dates

To assign Milestone dates:

1. Click a Task List link.
2. In the **Milestones** section on the Task List page, click the **Edit** icon .
3. On the Edit Milestones page, click a month, date, year, and time in the **Current Date** and **Actual Date** drop-down lists for each Milestone that you want to modify.
4. Click the **Update** button.

Viewing Task List Information

You can view information about Task Lists, Tasks, Milestones, and Assignees on the following information pages:

- Task List Summary, which provides summary information for all items in a Task List.
- Detail Resource List, which provides a summary of every user or group in a Task List that has assigned Tasks.
- Assignee Detail List, which provides a summary of the assignments for a specific user or group, and lists all assignments.
- Milestone Information pages, which provide information about individual Milestones and Milestones in a Task List.

Note: Only a Task's creator, a Project Coordinator, and a Task's assignee can modify information in a Task List and on its information pages.

Task List Summary

The Task List Summary page contains the following information:

- **Number of Tasks**, the total number of Tasks in the Task List
- **Percent Complete**, the percentage of Tasks completed to date
- **Number of Milestones**, the total number of Milestones in a Task List
- **Completed Milestones**, the number of Milestones completed to date
- **Current Milestone**, the Milestone assigned to the current Task
- **Resources**, the number of users and groups assigned to a Task List
- **Duration**, the number of days that have passed since the Task List was created
- **Pending**, the percentage and total number of Tasks that are pending for the Task List
- **In Process**, the percentage and total number of Tasks that are in progress for the Task List
- **Issue**, the percentage and total number of Tasks that are an issue for the Task List
- **On Hold**, the percentage and total number of Tasks that are on hold for the Task List
- **Completed**, the percentage and total number of Tasks that are completed for the Task List
- **Cancelled**, the percentage and total number of Tasks that are cancelled for the Task list

The Task List Summary also contains the following sections:

- **Milestones**, which is a list of the Milestones in a Task List.
- **Resources**, which provides a summary of Task and Milestone information for each user or group in a Task List.

Detail Resource List

The Detail Resource List contains the following information:

- **Assignee**, the names of the users and groups assigned a Task
- **Number of Tasks**, the total number of Tasks assigned to a user, and the number of Tasks that are late
- **Percent Complete**, the percentage of Tasks that are completed to date
- **Milestones Involved**, the total number of Milestones allocated to all Tasks assigned to a user
- **Pending**, the percentage and total number of Tasks that are pending for the Task List
- **In Process**, the percentage and total number of Tasks that are in progress for the Task List
- **Issue**, the percentage and total number of Tasks whose status is an issue for the Task List
- **On Hold**, the percentage and total number of Tasks that are on hold for the Task List
- **Completed**, the percentage and total number of Tasks that are completed for the Task List
- **Cancelled**, the percentage and total number of Tasks that are cancelled for the Task List

Assignee Detail List

The Assignee Detail List provides the same information as the Detail Resource List, but the information is specific to that assignee. This page also provides a list of the Tasks assigned to that user.

Milestone Information pages

You can view information about Milestones on the following pages:

- Milestone, which provides information about a specific Milestone.
- Detail Milestone List, which provides information for each Milestone in a Task List.
- Tasks Not in Any Milestones, which lists each individual Task that does not have a Milestone assigned to it, and provides summary information for the entire group of Tasks that are not associated with Milestones.

Note: The **Tasks Not in Any Milestones** link will not appear when all Tasks have Milestones assigned to them.

Each information page provides the following details for individual Tasks or a group of Tasks associated with a Milestone:

- **Original Date**, the original target date for completing the Task
- **Current Date**, the current target date for completing the Task

- **Actual Date**, the date the Milestone was completed
- **Number of Tasks**, the total number of Tasks, and the number of Tasks that are late in the Task List
- **Percent Complete**, the percentage of Tasks completed to date
- **Resources**, the number of users and groups assigned to the Task List
- **Duration**, the number of days that have passed since the Task List was created
- **Pending**, the percentage and total number of Tasks that are pending for the Task List
- **In Process**, the percentage and total number of Tasks that are in progress for the Task List
- **Issue**, the percentage and total number of Tasks whose status is an issue for the Task List
- **On Hold**, the percentage and total number of Tasks that are on hold for the Task List
- **Completed**, the percentage and total number of Tasks that are completed for the Task List
- **Cancelled**, the percentage and total number of Tasks that are cancelled for the Task List

Viewing Information Pages

To view information pages:

To view the . . .	*Do the following. . .*
Task List Summary page	Click a Task List link, and then choose **Summary** on the **Task List** menu.
Detail Resource List page	Click a Task List link, and then choose **Detail Resource List** on the **Task List** menu.
Assignee Detail page	On the Detail Resource List page, click the **View Detail** icon .
Milestone page	Click a Milestone link.
Detail Milestone List page	Click a Task List link, and then choose **Detail Milestone List** on the **Task List** menu.
Tasks Not in Any Milestones page	On the Detail Milestone List page, click the **Tasks Not in Any Milestones** link.

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