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Chapter One
Introduction
Overview

Livelink Intranet provides powerful document management, search, workflow, and project collaboration tools all within the framework of a Web browser.

In this guide, you learn how to use the components of Livelink Intranet:

• **Livelink Search**—powerful search engine that allows you to search the Livelink database, your local intranet, or the entire World Wide Web

• **Livelink Library**—robust multilevel document management including hierarchical structure, access control, custom attributes, check-in and check-out, document viewing and work on, compound document creation, and private document storage

• **Livelink Workflow**—graphical workflow functionality, including workflow routing, visual status, custom attributes, data packages, audit trails, and In Boxes

• **Livelink Project**—team collaboration implemented through team membership, project-specific document storage, task lists, discussions, and a project bulletin board

These components work together, seamlessly, helping people find information and work together more effectively.
Getting Started

Getting started with Livelink Intranet couldn’t be easier—there’s no Livelink Intranet software for you to install, no complicated setup procedures, and no platform-specific configuration. Simply start your Web browser, enter your Livelink Intranet URL and you are off and running (contact your System Administrator if you do not know your URL).

To run Livelink Intranet, follow these steps:

1. Start your Web browser.
2. Enter your Livelink Intranet URL.
   The Livelink home page displays.

The Livelink home page contains the Livelink Intranet graphic and a button bar providing access to Livelink operations and a list of text links corresponding to the button bar buttons.

You may want to save this page as a bookmark in your browser. This allows you easy access to your Livelink Intranet site the next time you want to open it.
Logging In and Out

When you first try to perform a function, Livelink Intranet asks you to log in. Doing so, registers you with the server, allowing Livelink Intranet to determine who you are, what permissions you have, and what work has been sent to you. You only need to log in once per Livelink Intranet session.

To log in:

1. Click the button or text link corresponding to the Livelink Intranet function you want to use.
   The Log-in page displays.

2. Enter your Username and Password in the appropriate text boxes.
   If you do not know what to enter, contact your system administrator for more information.

3. Click the Log-in button.
   Livelink Intranet logs you in and displays a page corresponding to the function selected.

Logging out severs your connection with the Livelink Intranet server. You must first log out if you want to log in to Livelink Intranet through a different user account. You might also want to log out of Livelink for security reasons if you are going to be away from your computer for a while.

If you quit your Web browser, Livelink Intranet automatically logs you out before quitting.
To log out of Livelink:

1. Open the Administration page by doing any of the following:
   - On the Livelink home page, click the Admin button or the Livelink Administration text link.
   - On any other page, select Administration from the Go to popup.

2. Click Log-out.
   The Log-out page displays.

3. Click the Log-out button.
   You are logged out and the Livelink home page displays. You need to log in again to access Livelink Intranet.
Changing Your Password

Your password is your access key to Livelink Intranet and is initially set by the user who created your user account (either the system administrator or another user with the proper privileges).

You may want to change your initial password or change your existing password periodically to prevent unauthorized use of your account. When you select a password, choose something that is easy for you to remember, but not so obvious that it is easy for others to guess.

Passwords can be up to 20 characters long, are case-sensitive, and can contain letters (upper and lower case), numbers, spaces, special characters, or any combination thereof. You must know your current password before you can change it. If you forget your password, contact your system administrator.

To change your password:

1. Open the Administration page by doing either of the following:
   - On the Livelink home page, click the Admin button or the Livelink Administration text link.
   - On any other page, select Administration from the Go to popup at the bottom of the page.

2. Click Change Password.

   The Change Password page displays.

   ![Change Password Page]

   - **User:** JillB
   - **Current Password:**
   - **New Password:**
   - **Verify Password:**

   Please type your new password again, just to make sure:

   [Update] [Reset]
3. Enter your current password in the Current Password field. If your account does not currently have a password and you want to assign one, leave this field empty.

4. Enter your new password in the New Password field.

5. Enter your new password again in the Verify Password field.

6. Click the Update button. Livelink Intranet verifies your current password and compares the passwords entered in the New Password and Verify Password fields and, if all passwords are correct, changes your password.
The My Stuff Page

My Stuff is a personal storage area that only you can access. You can store any type of library item there, for example, documents, folders, or workflow maps.

To display the My Stuff page, do either of the following:

- Click the My Stuff button in the Livelink Intranet button bar.
- Select My Stuff from the Go to popup displayed at the bottom of every page.

Functions on items stored on your My Stuff page work exactly the same as they do when working from a library page.

For more information on library items—folders, documents, compound documents, workflow maps, queries, and URLs—and the functions you can perform with them, see Chapter Three, Library.
The Go To Popup

At the bottom of most Livelink Intranet pages, there is a Go to popup that provides quick access to any area in Livelink Intranet. The Go to popup looks like this:

![Go to popup]

By selecting an item from this popup you can:

- **Administration**—display the Administration page and work with users and groups, access your projects, change your password, or log out
- **Checked-Out Items**—work with documents you have checked out
- **Home**—display the Livelink Intranet home page
- **In Box**—examine the workflow tasks and project tasks stored in your In Box
- **Library**—access the folders, documents, and other items stored in the Livelink library
- **Log-out**—disconnect from your Livelink Intranet server
- **My Stuff**—go to your My Stuff page
- **Projects**—work on the projects of which you are a member
- **Reports**—display the Reports page and access the saved queries stored there
- **Search**—perform a Livelink database, network, or World Wide Web search
- **Status**—check on the status of workflows you have initiated or manage
- **Workflow**—open the Workflows page and access the stored workflow maps saved there
What Should I Do First?

Entering your Livelink Intranet URL, username, and password, connects you to Livelink Intranet for the first time. Now what?

Unless you must perform a specific task, one of the most frustrating things about using new software is staring at that first screen wondering, “What should I do now?” If you are new to Livelink Intranet, here are a few suggestions to help you on your way:

- **Browse the Livelink Library**—Click the *Library* button to see what is in your Livelink library. The library is a shared storage area and may contain all sorts of useful documents, workflow maps, and other items.

- **Check Your In Box**—Click the *In Box* button to see what tasks are in your In Box. It may be empty now, but all workflow and project task assignments are sent to your In Box so you know that they need your immediate attention.

- **Perform a Search**—Another way to “see what’s out there” is to click the *Search* button. Doing so allows you to look for Livelink documents or search the World Wide Web.

- **Open the My Stuff page**—Click the *My Stuff* button to access your private storage space. Initially, your My Stuff page will be empty, however, you may want to open it up and add some folders or documents to it.

- **Look At Your Projects**—Even if you do not have any project task assignments directly assigned to you yet (which would show up in your In Box), you may want to click the *Projects* button to see what project teams you are a member of.

- **Examine the Online Help**—Livelink Intranet includes a comprehensive, context-sensitive help system that you can page through from top-to-bottom, or can call on whenever you need assistance on a particular page.
The Administration Page

The Administration page is a place where you can go to perform administrative tasks.

To display the Administration page, do either of the following:

- From the Livelink Intranet home page, either click the Admin button or click the Livelink Administration text link.
- From any other page, select Administration from the Go to popup.

From this page you can:

- Add, view, and edit users and groups—for more information, see the next section, Users and Groups
- Add a new project and view the projects you lead—for more information, see Chapter Five, Projects
- Change your password—for more information, see the Changing your Password section, earlier in this chapter
- View a list of checked-out items
- Log out of Livelink Intranet—for more information, see the Logging In and Out section, earlier in this chapter
Users and Groups

All Livelink Intranet users establish a user session by specifying a user name at connect time. This allows Livelink Intranet to:

- **Track actions (audit trail)**—who submitted a document, who created a workflow map, and so on
- **Route work appropriately**—what is the order of steps within this workflow, to whom is each task assignment given, and so on
- **Control access**—can this person access Livelink Intranet, whose Workbin page can they access, can this user modify this folder

Users that have something in common can be placed in a user group. Doing so provides a convenient method of accessing these users. This *something in common* can be anything the creator of the group deems important, for example, “Sales and Marketing,” “Home office employees,” “Staff on vacation.” Users can be placed in more than one group and groups can be placed inside other groups.

Creating a User

Every person must have a user account to access Livelink Intranet, and each server maintains a list of the users that have access. Before you can access Livelink Intranet, a user account must be created for you through which you can connect. A user account contains a profile that defines the user’s Log-in name, password, full name, electronic mail information, and privileges.

Your user account must have the *Can create/modify users* permission for you to be able to create new users.
To create a new user:

1. Open the Administration page by doing either of the following:
   - On the Livelink home page, click the Admin button or the Livelink Administration text link.
   - On any other page, select Administration from the Go to popup.

2. Click Add User.
   The Create User page displays.

<table>
<thead>
<tr>
<th>Create User</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Log-in Name:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Base Group:</strong></td>
<td>Chicago office</td>
</tr>
<tr>
<td>□ Set Password</td>
<td>Enter Password:</td>
</tr>
<tr>
<td>First Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
</tr>
<tr>
<td>E-mail Address:</td>
<td></td>
</tr>
</tbody>
</table>

**Privileges:**
- Log-in enabled
- Can create projects
- Can create/modify users
- Can create/modify public groups
- User administrator access
3. Enter a name for the user in the Log-in Name field. This name must be unique on the selected server.

4. Select a base group from the Base Group popup. This group provides a home base for the user and defines his or her basic set of permissions. For more information about permissions, see the Permissions section in Chapter Three, Library.

5. If you want to assign a password to this account, select the Set Password check box and enter a password into the Enter Password field. A password is optional.

6. If you entered a password in step 5, re-enter it in the Verify Password field. Livelink Intranet will verify that the passwords match when you save the user profile.

7. If desired, enter the user’s full name in the First Name, Middle Initial, and Last Name fields. Entering values in these fields is optional.

8. If desired, enter the user’s electronic mail address in the E-mail Address field. Entering a value in this field is optional.

9. Select the desired user privileges by selecting or deselecting the following check boxes:
   - Log-in enabled—the user can connect to this Livelink server
   - Can create projects—the user can create Livelink projects
   - Can create/modify users—the user can create new users and modify the users he or she created
   - Can create/modify public groups—the user can create public groups and can modify the public groups he or she created
   - User administrator access—the user can create users and public groups and modify all users and groups

   You cannot assign privileges that you do not have to another user.

10. Click the Add User button. If needed, you can, instead, click the Reset button to clear all of the fields, or click your browser’s Back button to close the Create User page without adding the user.
# Editing a User Profile

You can edit the user profile of a user you created if you have the `Can create/modify users` privilege on your user account. You can edit any user profile if you have the `User Administrator Access` privilege on your user account.

To edit a user profile:

1. **On the Administration page, click List Users.**
   
   The List Users page displays, listing users by login name and full name.

2. **Click Edit to the right of the user account you want to edit.**
   
   If there is not an Edit link next to the user’s name, you do not have permissions to edit that user.

   The Edit User page displays.
3. **Modify the displayed fields and check boxes, as desired.**
   For more information about the fields and check boxes displayed, see the Creating a User section, earlier in this chapter.

4. **Click the Update User button.**
   The user profile updates and the List Users page displays. If needed, you can, instead, click the Reset button to return the fields to their previous values, or click your browser’s Back button to close the Edit User page without modifying the user profile.

**Viewing Users**

You can view a list of all users in your Livelink database. You can also examine information about any Livelink user; you do not need any special privileges to do so. When you view a user’s profile, a limited amount of information is displayed.

To view users:

1. **On the Administration page, click List Users.**
   The List Users page displays.

   Users are listed alphabetically by login name and full name.
2. To view additional information about a user, click View to the right of the user name. The View User page displays.

![View User](image)

The user’s Log-in name, base group, full name (first name, middle initial, last name), and E-mail address are displayed. You can examine the user’s profile, but cannot make modifications. The E-mail address is displayed as a link. Clicking it opens an E-Mail page so that you can send a message to that user.

3. When you have finished examining the user’s profile, click your browser’s Back button to return to the List Users page. From there, you can examine additional user profiles, if desired.
Creating a Group

Groups can be created to organize users who have something in common and to facilitate the assignment of access permissions to projects, library items, or workflow steps. Groups can contain both users and other groups.

Only users with *Can create/modify public groups* or the *User Administrator Access* privilege can create groups.

To create a group:

1. **On the Administration page, click Add Group.**
   The New Group page displays.

2. **Enter a name for the Group in the Group Name field.**
   This name must be unique on the selected server.

3. **Click the Submit button.**
   The group is added and the Administration page is again displayed. If needed, you can, instead, click the Reset button to clear the field, or click your browser’s Back button to close the New Group page without adding the group.

   When you create a new group, you simply assign a name to it. You should then add members to the group. For information about adding members, see the following section, Editing a Group.
Editing a Group

You can edit any group you created if you have the *Can create/modify public groups* privilege on your user account. You can edit any group in the database if you have the *User administrator access* privilege on your user account.

Editing a group allows you to:

- Add members
- Delete members
- Set and Unset group leader

To edit a group:

1. On the Administration page, click List Groups.
   
The List Groups page displays.

2. Click Edit to the right of the group you want to edit.
   
The Group Members Info page displays.
The group name, its leader, and all members display in the left frame. For new groups, no members are displayed.

3. To add members, follow these steps:
   a) Click Add Members.
      All Livelink Intranet users and groups display in the right frame.
b) Select the check boxes next to the users and groups you want to add. You may have to scroll down to see all users and groups.

c) Click the Add To Group button.
The member list in the left frame updates to display your new members.

4. To delete a member, follow these steps:
   a) Click the name of the user or group you want to delete.
   Information about that user or group appears in the right frame.

   b) Click the Remove from Group button.
The right frame clears and the user or group is removed from the left frame.
5. To set the group leader, follow these steps:
   a) Click the name of the user you want to be the group leader.
      Information about that user appears in the right frame.

   b) Click the Set as Group Leader button.

6. To unset the group leader, follow these steps:
   a) Click the name of the group leader.
      Information about the leader appears in the right frame.
b) **Click the Unset as Group Leader button.**
The right frame clears and the user returns to regular member status. The group leader is undefined.
Viewing Groups

You can view a list of all groups in your Livelink database. You can also view a list of the group’s members and see who is the assigned group leader. You can examine this information for any group; you do not need any special privileges to do so.

To view all groups:

1. On the Administration page, click List Groups.
   The List Groups page displays.

2. To view additional information about a group, click View to the right of the group name.
   The Group Members Info page displays.

The group’s name, its leader, and all members display in the left frame. You can view information about a particular user or group by clicking their name.
Chapter Two
Search
Overview

Livelink Intranet provides search capabilities to help you locate items stored anywhere in Livelink Intranet, on your local network, or on the World Wide Web (WWW). You can search for an item based on system or custom attributes or based on content (documents only). For network and WWW searches, you can search for items based on a word or a phrase.

If you want to reuse a search definition, you can save it as a query, thereby creating a new library item. Queries can be stored in any Livelink location—the library, the Reports page, a project Workbin, and so on. You can save and reuse queries; once you launch a search, it has completed its task and cannot be saved. For more information, see Chapter Three, Library.

This chapter provides instructions for performing the various types of searches and includes hints for achieving the best search results, information about how to refine your search, and some useful examples.
Livelink Database Search

The Livelink Database Search function allows you to search for items (such as documents, generations, and workflow maps) found in your Livelink database. These items can be stored anywhere—in My Stuff, the library, the Workflows folder, the Reports folder, or in any project’s Workbin.

A Livelink database search definition can include:

- item type—the type of item to locate
- location—the area in which to look
- criteria—characteristics the found items share (creation date, modification date, custom attribute values)
- content—for document searches only, words or phrases that the found documents should contain

To define a Livelink database search:

1. Open the Search page by either clicking the Search button or selecting Search from the Go To popup at the bottom of any page.
   The Search page displays.
2. **Select an item type from the Find popup.**
   Doing so allows you to specify whether you want to search for one of the following item types:
   - all
   - compound documents (or an alias/generation thereof)
   - documents (or an alias/generation thereof)
   - folders (or an alias thereof)
   - queries (or an alias thereof)
   - document super alias or folder super alias
   - workflow maps (or an alias thereof)

3. **From the in popup, select the location within Livelink Intranet you want to search.**
   Select one of the following Livelink Intranet locations:
   - My Stuff
   - Library
   - Reports
   - Workflows
   - Project <name>

4. **To search by name, specify the Name criteria:**
   a) Select the **where** check box.
   
   b) Select a **Name operator** from one of the following:
      - Name contains
      - Name starts with
      - Name equals
      - Name ends with
   
   c) Enter a **comparison value** in the text box.
      
      For example, you could select **Name contains** and then enter the string “.DOC” to search for documents that have a DOC extension.
5. To search by the last modification date, specify the Last Modified date criteria:
   a) Select the Last Modified check box.
   b) Select a Date operator:
      = equals
      < > does not equal
      < less than
      > greater than
      < = less than or equal to
      > = greater than or equal to
      is Null date parameter present
      is not Null no date parameter present
   c) If you want to search based on a single date operation, enter the comparison date in the first date field.
      For example, to find items last modified before 1996, select the < (less than) operator and enter 01/01/1996 as the comparison date.
   d) If you want to search between two specific dates, enter the from and to dates and select an additional date operator from the second operator popup.
      For example, to find items last modified in 1995, select the > (greater than) operator and enter 12/31/1994 as the comparison date. Then, select the < (less than) operator and enter 01/01/1996 as the comparison date.

6. To search for documents and have Livelink Intranet examine their contents to see if a particular character string appears within the text:
   a) Select the Document Contents check box.
   b) Select one of the following character string delimiters from the Document Contents popup:
      - this exact phrase—locates documents that contain these words in this exact order
      - all of these words—locates documents that contain all of the words entered
      - any of these words—locates documents that contain at least one of the words entered
   c) Enter the character string to be compared against, in the text field.
      For example, if you enter car, you can search for all documents that contain the word car anywhere within the document, even those that do not have the word car in their title.
7. To search by category, select the Category check box and then select a category from the popup. The categories that display depend on the categories have been defined for your database.

8. To display additional search values, click the Expand button. The Search page expands to include a more complex set of criteria and a Save button.

9. If desired, further define the item type by selecting the All Versions check box. Doing so instructs Livelink Intranet to look at the previous versions of the item to determine if the criteria are met.

10. To further define the document contents criteria, scroll down to the second pane.

   a) Select the Enter one word or phrase per line radio button.
   b) Enter the words or phrases that the documents you locate should contain in the fields.
   c) Select operators from the popups to establish relationships among the words or phrases.
      • and—contains both
      • or—contains either
      • but not—contains the first and does not contain the second
      • near—contains the first in close proximity to the second
      • followed by—contains the first immediately followed by the second
11. To further define system attribute criteria, scroll down to the third pane.

<table>
<thead>
<tr>
<th>AND □ Filename</th>
<th>contains ▼ □</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>AND □ Data Size</td>
<td>▼ □</td>
<td></td>
</tr>
<tr>
<td>AND □ Res Size</td>
<td>▼ □</td>
<td></td>
</tr>
<tr>
<td>AND □ File Type</td>
<td>contains ▼ □</td>
<td></td>
</tr>
<tr>
<td>AND □ File Creator</td>
<td>contains ▼ □</td>
<td></td>
</tr>
<tr>
<td>AND □ File Created</td>
<td>▼ □</td>
<td>AND □</td>
</tr>
<tr>
<td>AND □ File Modified</td>
<td>▼ □</td>
<td>AND □</td>
</tr>
</tbody>
</table>

- a) Include an attribute by selecting the check box preceding the attribute.
- b) Select an operator from the popup.
- c) Enter a comparison value in the field.
- d) For date values only, select a second operator and enter a second date to specify a date range.

The following attributes are available:

- **Owner**—the user who added the item to Livelink Intranet; comparison value is a text string
- **Creation Date**—the date on which the item was added to Livelink Intranet; comparison value is a date or date range
- **Reserved**—whether the item is reserved; comparison value is TRUE or FALSE
- **Reserved By**—the name of the user who reserved the item; comparison value is a text string
- **Reserved Date**—the date on which the item was reserved; comparison value is a date or date range
- **Version Number**—the number of the version you want to locate; comparison value is an integer or integer range
- **Version Name**—the file name of the version; comparison value is a text string
- **Version Owner**—the user who added this version of the item to Livelink Intranet; comparison value is a text string
- **Version Modified**—the date on which the version was last modified; comparison value is a date or date range
- **Version Platform**—the hardware platform on which the version was created; comparison value is a text string *(usually Windows or Macintosh)*
- **Filename**—the name of the file attached to the item *(for documents, document generations, or document aliases only)*; comparison value is a text string
- **Data Size**—the size, in bytes, of the data fork of the file *(Macintosh)* or the entire file *(Windows)* attached to the item *(for documents, document generations, or document aliases only)*; comparison value is an integer
- **Res Size**—the size, in bytes, of the resource fork of the file *(Macintosh only)* attached to the item *(for documents, document generations, or document aliases only)*; comparison value is an integer
- **File Type**—the type of file expressed as an internal file type *(Macintosh)* or a file extension *(Windows)* attached to the item *(for documents, document generations, or document aliases only)*; comparison value is a text string
- **File Creator**—the creator of the current version *(for Macintosh documents, document generations, or document aliases only)*; comparison value is a text string
- **File Created**—the date on which the current version was created; comparison value is a date or date range
- **File Modified**—the date on which the current version was last modified; comparison value is a date or date range
12. To define custom attribute criteria scroll down to the fourth pane.

- Include an attribute by selecting the check box preceding the attribute.
- Select an operator from the popup.
- Enter a comparison value in the field.
- For date values only, select a second operator and enter a second date to specify a date range.

**Note** Custom attributes display only if the Category check box was selected on the simple (preceding) Search page.

13. Once you have completely defined your search criteria, click one of the following buttons:

- **Search** — Runs your search. For more information about the results, see the following section.
- **Clear** — Discards the information you have entered.
- **Save** — Saves your search as a query. For more information about queries, see the Queries section in Chapter Three, Library.
Searching

Performing a search locates items meeting the criteria you defined and then displays the found items on the Search Results page.

To display search results:

- Create a search definition and then click the Search button.
- Locate a saved query and click the Run link.

The Search Result page displays a summary of your search criteria and lists items, by name, that match the criteria. Queries defined using the Wide client, can include a customized results display definition. Therefore, if you run such a query, your Search Results page may contain different information.

Document names display as links. When you click a document link, Livelink Intranet either fetches the document (standard searches and queries) or opens an Information About page for the document (customized queries).

Folder names also display as links. When you click a folder link, Livelink Intranet opens the folder and displays the items contained within.

For searches or queries without custom results definitions, icons indicating the operations that you can perform on the found items display to the right of each item. For more information, see Chapter Three, Library.
If you do not want to operate upon any of the items found, you can leave the Search Result page by doing any of the following:

- **Click the Web browser’s Back button to return to the Search page.**
  Doing so displays a Search page containing all of the search parameters you previously defined. You can then refine the previous search definition.

- **Click the Search toolbar button.**
  Doing so displays an empty Search page. You can then create a new search definition, from scratch.

- **Click the Home toolbar button.**
  Doing so displays the Livelink home page from which you can access any Livelink page.

- **Make a selection from the Go to popup at the bottom of the page.**
  Doing so displays a Livelink page corresponding to your selection.
Network Search

You can perform searches on internal Web sites, located within your own Intranet. The network search function allows you to search outside of your Livelink Intranet database and build an index on that information. For example, you may want to search for corporate information that is available on your company’s home site to produce marketing or sales presentation material. This information may not be part of the database you use daily.

The network search function works in the same way as the World Wide Web search, but searches your local Intranet only.

To define and perform a search within your network:

1. Open the Search page by either clicking the Search button or selecting Search from the Go To popup at the bottom of any page.
   The Search page displays.

2. Scroll down to the Network Search pane.

3. Select one of the following operators from the popup:
   - this exact phrase—locates documents that contain these words in this exact order
   - all of these words—locates documents that contain all of the words listed
   - any of these words—locates documents that contain any of the words listed

4. Enter a word or a phrase in the field to the right of the popup.
5. Click the Search button.
   If you want to discard the information you have entered and start over, click the Clear button instead.

   When you click Search, Livelink Intranet performs the search and then displays the results. The following is an example of the results of a network search:

   Click any of the links to retrieve the appropriate Web page.
World Wide Web Search

Livelink Intranet allows you to perform a search across the World Wide Web. You can define and perform a simple or power search. Power searches allow you to define more complex search criteria.

Simple Search

To perform a simple search:

1. Open the Search page by either clicking the Search button or selecting Search from the Go To popup at the bottom of any page. The Search page displays.
3. Select one of the following operators from the popup:
   - Search for these words—locates documents that contain all of the words listed
   - Search for this phrase—locates documents that contain the words listed in the exact order in which they are listed
4. Enter a word, combination of words, or a phrase in the field to the right of the popup.
5. **Click the Search button.**
   If you want to discard the information you have entered and start over, click the Clear button instead.

   When you click the Search button, Livelink Intranet performs the search and then displays the results. The following is an example of the results of a World Wide Web search:

   ![Search Results](image)

   The Open Text Index found **216** pages containing: **livelink**

   You can **improve your result** or **start a new search**.

   **pages 1-10 (of 216)**

   1. **Welcome to LiveLink** (score: 11218, size: 4.4k)
      Home of the Personal Web Weaver for HTML Home of the Hypertext Generator for EFT
      Welcome to our web space for Web producers, tech writers and other document professionals.
      You can browse through our catalog of downloadable software, view our array of custom
      ![Visit the page](image)

   2. **Livelink Intranet Suite** (score: 1614, size: 5.3k)
      From: [http://www.openext.com/corp/courses-ll-suite.html](http://www.openext.com/corp/courses-ll-suite.html)
      ... The Livelink Intranet Suite is a set of courses which provide a full introduction to the Library,
      Workflow, Collaboration, and Search engines of the Livelink Intranet Application Suite. These
      courses are offered as a suite monthly at the Bannockburn office

   Click any of the links to retrieve the appropriate Web page.
Power Search

Livelink Intranet also allows you to perform a power search. Doing so allows you to define a more complex criteria set, narrowing your search by the use of operators (and, or, but not, near, or followed by) that join several words and phrases and within clauses that define where in a Web page to locate the words or phrases. For example, you can search anywhere within a document, within its title, within the first heading, and so on.

To perform a power search over the World Wide Web:

1. Open the Search page by either clicking the Search button or selecting Search from the Go To popup at the bottom of any page.
   The Search page displays.


3. Click the Power Search link.
   The following page displays.

4. Enter the words or phrases to locate in the fields.

5. Select operators from the popups to establish relationships among the words or phrases.
   
   - and—contains both
   - or—contains either
   - but not—contains the first and does not contain the second
   - near—contains the first in close proximity to the second
   - followed by—contains the first, immediately followed by the second
6. Define a location clause by selecting one of the following locations from the within popups.
   - anywhere—word or phrase is located anywhere on the page
   - summary—word or phrase is part of the page summary
   - title—word or phrase is contained in the page title
   - first heading—word or phrase is contained in the first heading on the page
   - URL—word or phrase is part of the page’s URL

7. Click the Search button.
   If you want to discard the information you have entered and start over, click the Reset button instead.

   When you click the Search button, Livelink Intranet performs the search and then displays the results. The following is an example of the results of a World Wide Web power search:

   The Open Text Index found **111** pages containing: **livelink And intranet**
   
   You can improve your result or start a new search.

   **pages 1-10 (of 111)**

   1. **Livelink Intranet Suite** (score: 2922, size: 5.3k)
      From [http://www.opentext.com/corp/cours-ll-suite.html](http://www.opentext.com/corp/cours-ll-suite.html)
      .. The Livelink Intranet Suite is a set of courses which provide a full introduction to the Library, Workflow, Collaboration, and Search engines of the Livelink Intranet Application Suite. These courses are offered as a suite monthly at the Bannockburn office.
      [Visit the page]

   2. **Introducing Livelink Intranet** (score: 2846, size: 13.2k)
      What Is Livelink Intranet? Livelink Intranet lets your organization leverage the power of the Internet to control and coordinate key business processes of any size or complexity. You get unprecedented support for collaborative efforts that span continents.

   Click any of the links to retrieve the appropriate Web page.
Chapter Three
Library
Overview

The library is a public repository of data, referred to as library items, that are organized into a hierarchical structure. Livelink Intranet allows you to store the following types of items in the library:

- *folder*—a storage container in which other library items, including other folders, can be placed
- *document*—any type of electronic file, for example, a spreadsheet, an HTML file, a bitmap
- *compound document*—a Livelink-specific document containing a master document and one or more subItems
- *workflow map*—a Livelink-specific definition of a work process created with the Map Painter
- *query*—a saved Livelink database search definition
- *URL*—an Internet address
To connect to the library:

- Either click the Library button or text link on the Livelink Intranet home page, or select the Library link from the Go To popup at the bottom of any page.

If you are not already connected to the Livelink server, the Log-in page displays. You must first log in before you can access the library.

The library page then displays.

![Library Page](image)

The Library page displays the main or root level of your Livelink library. All folders and other library items stored at the root level are displayed.

At the top of the page are the word “Library” and two links, Info and Add. Clicking Info displays information about the library; clicking Add allows you to add items to the library. As you navigate into the hierarchy of folders stored in the library, the name of each folder entered is displayed, next to the word “Library.” Each previous level becomes a link, allowing you to revert to any library level with a single click.
The rest of the Library page displays the contents of the library. The manner in which each item is displayed, and the function you can perform with it, depend upon the type of item.

In addition to the formal library, Livelink Intranet contains several additional storage areas in which these library items can be saved:

- your My Stuff folder
- the Workflows folder
- the Reports folder
- a project Workbin

All of the information presented in this chapter about the library pertains to items stored in these locations as well.
Folders

Folders are storage areas that allow you to hierarchically organize the items you store in the Livelink library.

Opening Folders

Opening folders allows you to navigate through the library structure and work with the items that are stored inside them. Opening a folder displays the folder’s contents on a new library page.

To open a folder:

1. Display a Library page.
   The contents of the library display.

2. Locate the folder you want to open and click the folder name link.

   The Library page is updated to display the contents of the folder. The name of the folder you are in is displayed at the top of the page. Preceding the folder name is the ancestry of the folder—the names, if any, of the folders in which the folder is contained, up to the root folder, represented by the Library link.

3. To open a different folder, either click the folder name link displayed with the rest of the folder's contents, or click a folder name link in the ancestry list.

   Returning to a previous folder using the ancestry list instead of your Web Browser’s Back button, ensures that the previous folder page updates to reflect any items that may have been added or deleted to the folder while the other folder was open.
Adding a Folder

You can add folders at any library location in which you have Add Items permission. You can add folders within folders at as many levels as you need to organize your library. Once you add a folder, you can place other items inside it.

To add a folder:

1. Navigate to the location to which you want to add the folder.
2. Click Add.
   The Add New Item page displays.

3. Either click the Folder link or scroll down to the Add Folder pane.

   ![Add New Item](image)

   ![Add Folder](image)
4. Enter a name for the new folder in the Name field.
The name entered must be unique within the selected location. A folder name can
contain up to 248 characters, including spaces, and cannot contain colon ( : )
characters.

5. If desired, add a description of the folder in the Description field.
Entering a description is optional.

6. Click the Add Folder button.
Documents

Any type of electronic file you can store on your computer, for example, text files, word processor files, spreadsheets, can be stored in Livelink Intranet as a document. The Livelink library manages the documents you store—controls access to them, maintains information about them, and facilitates working with them.

Livelink Intranet maintains a complete history of changes made to all documents stored in the library and a record of all actions that generated those changes. Therefore, a Livelink document actually consists of a set of electronic files, one for each version created (up to a preset limit). By default, you always work with the most recent version of the file, but you can, at any time, revert to previous versions as needed.

All documents have permissions that define the operations that you can perform on them. By default, documents inherit the permissions of the location in which they are stored, but you can override these default permissions.

Documents are listed on a Library page by name (displayed as a link), followed by the creation date, an Info link, and a View link.

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Date</th>
<th>Info</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes (Dec)</td>
<td>12/03/1996</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trade Show Info</td>
<td>12/03/1996</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Questions</td>
<td>12/03/1996</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Clicking the document name link allows you to fetch the document. Clicking Info displays information about the document and provides access to additional document operations. Clicking View allows you to view the documents contents.
Adding a Document

You can add any type of electronic file stored on your desktop as a new document. Adding a document creates a new document item, transferring the electronic file from your desktop to the Livelink database. You can add a document to any storage location in which you have Add Items permission.

To add a document:

1. Navigate to the location in which you want to add the document.
   For example, if you want to add a document to the root level of the library, open the Library page. To add the document to a particular folder, navigate to that folder first.

2. Click Add.
   The Add New Item page opens.

   ![Add New Item](image)

   **Select a New Item to Add:**
   - Document
   - Folder
   - URL
   - Compound Document
3. Either click the Document link or scroll down to the Add Document pane.

4. Enter the full path and name of the desktop document you want to add in the Input File field.
   If you do not know the name or full path to the document, click the Browse button to locate the document on your desktop.

5. Enter a name for the new document in the Name field.
   The name entered must be unique within the selected location. It can, but need not be, the same as the input file name. A document name can contain up to 248 characters, including spaces, and cannot contain colon (:) characters.

6. If desired, add a description of the document in the Description field.
   Entering a description is optional.

7. Click the Add Document button.
Compound Documents

A compound document can be used to represent a document comprising many components. Often, a compound document is seen as a set of documents that are related in a certain order, for example:

- an engineering manual and all of its procedures
- a book and all of its chapters (whose chapters may also be compound documents containing chapter sections and illustrations)
- an HTML document and all of the GIF files it references

Although both folders and compound documents can be viewed as containers for documents, compound documents differ from folders containing documents in several important ways:

- The documents contained within a compound document are maintained in a specific order (first, second, and so on.); folders are not ordered.
- Users can make revisions and releases of a compound document (frozen versions that are automatically numbered by Livelink Intranet); folders do not have release/revision capabilities.
- Compound documents can be reserved, preventing other users from changing them; folders cannot be reserved.
- Compound documents can only contain documents or other compound documents (or aliases and generations thereof); folders can also contain folders, workflow maps, queries, and URLs.

Adding a Compound Document

Adding a compound document creates a new item into which can be added.

1. **Navigate to the location in which you want to add the compound document.** For example, if you want to add a compound document to the root level of the library, open the Library page. To add the compound document to a particular folder, navigate to that folder first.
2. Click Add.
The Add New Item page displays.

3. Either click the Compound Document link or scroll down to the Add Compound Document pane.

4. Enter a name for the new compound document in the Name field.
The name entered must be unique within the selected location. A compound document name can contain up to 248 characters, including spaces, and cannot contain colon (:) characters.

5. If desired, add a description of the compound document in the Description field.
Entering a description is optional.

6. Click the Add Compound Document button.
Adding SubItems

Livelink Intranet allows documents and compound documents (and aliases or generations thereof) to be added as the components or subItems of a compound document. You can add both desktop documents and Livelink documents.

If you add an alias to a compound document, keep in mind that you are adding a reference to a document that is stored elsewhere in Livelink Intranet. The document may, therefore, be modified by users who do not have access to the compound document (but, this is often the very reason you add an alias). For more information about aliases, see the Aliases section, later in this chapter.

When you add a subItem to a compound document it is automatically placed at the end of the subItem list and numbered accordingly. You can renumber subItems or change subItems’ positions, if desired. For more information, see the Reordering SubItems section, later in this chapter.

You must have Add Items permission on the compound document to add subItems.

To add a desktop document or a new (empty) compound document as a subItem:

1. Click the compound document name link to open it.
   The Compound Document page displays.
2. Click Add.  
The Add New Item page displays.

3. To add a document:
   a) Either click Document or scroll down to the Add Document pane.

   ![Add New Item](image)

   ![Add Document](image)

   b) Enter the path and name of the document in the Input File field.  
   If you do not know the name or full path to the document, click the Browse button to locate the document on your desktop.

   c) Enter a name for the new document in the Name field.  
   The name must be unique within the selected location. It can, but need not be, the same as the input file name. A document name can contain up to 248 characters, including spaces, and cannot contain colon (:) characters.

   d) If desired, add a description of the document in the Description field.  
   Entering a description is optional.

   e) Click the Add Document button.
4. To add a new (empty) compound document:
   a) Either click the Compound Document link or scroll down to the Add Compound Document pane.

   ![Add Compound Document](image)

   b) Enter a name for the new compound document in the Name field. The name entered must be unique within the selected location. A compound document name can contain up to 248 characters, including spaces, and cannot contain colon (:) characters.

   c) If desired, add a description of the compound document in the Description field. Entering a description is optional.

   d) Click the Add Compound Document button.

You can also add copies of document that exist in other Livelink storage locations as subItems of compound documents.

To add an existing document or compound document as a subItem:

1. Locate the document or compound document you want to add.

2. Click the Info link displayed to the right of the item's name. The Information About page displays.
3. Scroll down to the FUNCTIONS pane.

![FUNCTIONS pane](image)

4. Click Copy To.
   The Choose a Destination page displays.

![Choose a Destination page](image)

5. Select the Library radio button.
   The valid library locations are displayed in the list box at the bottom of the page.

6. Select the compound document to which the item should be copied.

7. Click the Copy To button.
**Working with the Master Document**

You can specify that one of the subItems within a compound document is to be the *master document*, a main document that is removed from the numbering scheme of the compound document. Examples where you might want to create a master document include:

- a *book* file for a desktop publishing document where each linked chapter and linked graphic is a subItem
- an HTML file as the master document, with all its GIF files as subItems

A subItem that is a compound document cannot be selected as the master document. You must have *Modify* permission on the compound document to set the master document.

To make a subItem the master document:

1. Click the compound document name link to open it.
   
   The Compound Document page displays.

![Image of Compound Documents page](image-url)
2. Click the Info link to the right of the subItem you want to be the master
document.
The Information About page displays.

3. Scroll down to the FUNCTIONS pane.

4. Click Set Master.

5. Click the Update button.

Unsetting a master document removes the master document designation from a
subItem, placing it at the end of the subItems list.

To unset the master document:

1. Click the compound document name link to open it.
The Compound Document page displays.

2. Click the Info link to the right of the subItem you want to unset as the master
document.
The Information About page displays.

3. Scroll down to the FUNCTIONS pane.

4. Click Unset Master.

5. Click the Update button.
Reordering SubItems

By default, new subItems are added to the end of the subItem list, and numbered sequentially. If the subItem added is a compound document, its items will be numbered in a \( N.n \) format, where \( N \) is the position of the sub-compound document within the compound document and \( n \) is the element's position within its compound document.

You can renumber subItems as needed. For example, you can:

- change the position of a particular subItem
- renumber all documents sequentially

You must have Modify permission on the compound document to reorder its subItems.

To reorder subItems:

1. Click the compound document name link to open it.
   The Compound Document page displays.

2. Click the Info link at the top of the page.
   The Information About page displays, containing information about the compound document.
3. Scroll down to the FUNCTIONS pane.

4. Click Reorder.
   The Reorder Contents page displays.

   ![Reorder Contents](image)

   The Current column shows the subItem's current position. The New column contains fields that allow you to change a subItem's position. The Name column displays the name of the subItem.

5. Enter the desired positions for the subItems in the New fields.
   You cannot enter zero or assign the same position to multiple documents.

6. Click the Update button.
   The Information About page again displays.

7. Click the Update button.
   The Compound Document page displays the renumbered subItems.
Auto-renumbering subItems renumbers subItems sequentially, according to their current relative positions. For example, by deleting or reordering subItems, you may have a non-continuous subItem order. Auto-renumbering a compound document containing subItems 2, 3, 6, and 8 will keep the subItems in their current order, but renumber them 1, 2, 3, and 4.

To auto-renumber subItems:

1. Click the compound document name link to open it.
   The Compound Document page displays.

2. Click the Info link at the top of the page.
   The Information About page displays, containing information about the compound document.

3. Scroll down to the FUNCTIONS pane.

4. Click Auto-Renumber.

5. Click the Update button.
   The Compound Document page displays the renumbered subItems.
Deleting SubItems

Deleting a subItem removes it from the compound document and from the library. When you delete a subItem, the remaining documents are not automatically reordered. Deleting a subItem removes it entirely from the library, so you may want to copy the document to another location (see the Copy To section, later in this chapter) before deleting it.

You must have Delete permission on the compound document to delete or remove subItems.

To delete a subItem:

1. Click the compound document name link to open it.
   The Compound Document page displays.

2. Click the Info link to the right of the subItem you want to delete.
   The Information About page displays.

3. Click the Delete button.
   A dialog box opens asking you to confirm your choice.

4. Click OK.

Releases and Revisions

Releases and revisions are versions of the compound document. Creating a release or a revision freezes the compound document in its current state so that any modifications made to the compound document are not reflected in the release or revision. You might create a release, for example, of a compound document representing a software manual, when the software is released. Then, you could continue to update the manual (for the next version of the software) while still maintaining an exact copy of the printed manual you released.

Livelink Intranet automatically numbers releases and revisions as they are created.

- **Releases**—major versions of a compound document. They are numbered 1.0, 2.0, 3.0, etc.
- **Revisions**—minor versions of a compound document. They are based upon a release. They are numbered 1.3, 2.12, 3.1 etc.
You are still afforded Livelink Intranet’s standard version capabilities on the individual subitems stored within a compound document. For more information about versions, see the Version Control section, later in this chapter.

When you create an alias of a compound document (see the Aliases section, later in this chapter), you must select whether the alias should maintain a link to the work-in-progress, the current release, or the current revision.

To create a release:

1. Locate the compound document of which you want to make a release.
2. Click the Info link to the right of the compound document.
   The Information About page displays.
3. Scroll down to the FUNCTIONS pane.
4. Click Make Release.
   The Add New Item/Make Release page displays.

The name of the compound document, along with the current release number and the new release number, is displayed.
5. **Enter a name for the release in the Release Name field.**
   The name “Release <n>.0” is the default suggestion, but you can change this, if desired. Changing the name does not modify the release number.

6. **Click the Add Release button.**

To create a revision:

1. **Locate the compound document of which you want to make a revision.**
2. **Click the Info link to the right of the compound document.**
   The Information About page displays.
3. **Scroll down to the FUNCTIONS pane.**
4. **Click Make Revision.**
   The Add New Item/Make Revision page displays.

![Add New Item](image)

The name of the compound document, along with the current revision number and the new revision number, is displayed.

5. **Enter a name for the revision in the Revision Name field.**
   The name “Revision<n>.0” is the default suggestion, but you can change this, if desired. Changing the name does not modify the revision number.

6. **Click the Add Revision button.**
Livelink Intranet allows you to access all releases and revisions of a compound document by displaying the Expanded Information page. On this page you can:

- view the contents of a release or revision
- delete a release or revision
- lock a release or revision

To display Releases/Revisions:

1. Locate the compound document.
2. Click the **Info** link to the right of the compound document.
   The Information About page displays.
3. Click the **Expanded Info** button.
   The Expanded Information page displays.
4. Scroll down to the Releases/Revisions pane.

<table>
<thead>
<tr>
<th>Name</th>
<th>Locked</th>
<th>Release</th>
<th>Created by</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release 1.0</td>
<td>No</td>
<td>1.0 (current)</td>
<td>Admin</td>
<td>12/03/1996 10:25 AM</td>
</tr>
<tr>
<td>Revision 1.1</td>
<td>No</td>
<td>1.1</td>
<td>Admin</td>
<td>12/03/1996 10:25 AM</td>
</tr>
<tr>
<td>Revision 1.2</td>
<td>No</td>
<td>1.2 (current)</td>
<td>Admin</td>
<td>12/03/1996 10:26 AM</td>
</tr>
</tbody>
</table>

All releases and revisions created for the specified compound document display. You can access the contents of any release or revision by clicking the item name link.
5. Click the desired release or revision link.
   The Release Info (or Revision Info) page displays:

![Release Info Page]

In the left frame, is a list of the subitems. You cannot change subitems content or order. As you select a subitem, the right frame displays information about the subitem and the following function links:

- **View**—(documents only) displays the document in the installed viewer
- **Fetch**—(documents only) hands the document content to your browser and then copies it or launches it, depending on the stored MIME type
- **Copy To**—copies the subitem to another Livelink location

The following buttons are also displayed:

- **Lock/Unlock**—toggles the lock status of the release or revision on or off; locked releases or revisions cannot be deleted
- **Delete**—removes the release or revision without renumbering the remaining releases or revisions; you cannot delete releases on which revisions are based

6. When you have finished working with releases and revisions, click the compound document name link to return to the compound document page.
Workflow Maps

A workflow map is a template for a work process. It is on the workflow map that information about the process (the users, the steps, the data on which users will work) is stored. Chapter Four, *Workflow*, provides a complete description of defining workflow maps and generating work processes. However, since workflow maps are another type of item that can be stored in the library, their storage functions are discussed here.

You can perform any of the following functions on a workflow map:

- assign permissions
- assign a category and set permission values
- view information/properties about the workflow map
- delete a workflow map
- rename a workflow map
- reserve and unreserve a workflow map

More information about all of these functions is presented later in this chapter.
Queries

A query is a saved search definition. To create a query you can define:

- item type—the type of items you want to find
- location—the location in which to look
- criteria—the characteristics the found items should share (creation date, custom attribute values, etc.)
- content-based criteria—for document queries only, words or phrases that the found documents should contain

Queries are created on the Search page. Once created, they can be used immediately and discarded, or saved for later reuse. For more information, see Chapter Two, *Search*.

Since queries are another type of item that can be stored in the library, their storage functions are discussed here.

You can perform any of the following functions on a query:

- assign permissions
- assign a category and set permission values
- view information/properties about the query
- delete a query
- rename a query
- reserve and unreserve a query

More information about all of these functions is presented later in this chapter.
URLs

A Livelink URL stores the address to an Internet location. It can be the address to a Web page (for example, http://www.opentext.com), an ftp site (for example, ftp://incoming.outCorp.com), or an E-Mail address (mailto:arnold@thisCorp.com).

Livelink URLs are stored as two text fields: a name and an Internet address. In this way, a Livelink URL is similar to a Web Browser bookmark. When you double-click a URL, Livelink Intranet passes the address to your Web Browser, without interpreting it.

Adding a URL

You save an Internet address to Livelink Intranet as a new URL. You can add a new URL to any storage location in which you have Add Items permission.

To add a URL:

1. Navigate to the location in which you want to add the URL.
2. Click Add. The Add New Item page displays.
3. Either click the URL link or scroll down to the Add URL pane.
4. Enter a name for the new URL in the Name field.
The name entered must be unique within the selected location. A URL name can contain up to 248 characters, including spaces, and cannot contain colon (:) characters.

5. Enter the address in the URL field.
You must enter the URL exactly as you would enter it in your Web Browser.

6. If desired, add a description of the URL in the Description field.
Entering a description is optional.

7. Click the Add URL button.

Your URL is added to the Livelink database. If you want to change the URLs parameters (modifying it’s name or Internet address), you can do so on the URL’s Information About page. For more information, see the Information About and URL Properties sections, later in this chapter.

**Opening a URL**

Opening a URL launches your Web Browser and passes the URL address to it. Your Web Browser then goes to the specified address.

To open a URL:

1. Navigate to the location containing the URL.
2. Click the URL name link.
Aliases

An alias provides easy access to an item you use frequently. You may be familiar with Windows shortcuts or Macintosh aliases; Livelink aliases work in much the same way. When you create an alias you create a new item which is simply a reference to the original item. You can then place that reference in any desired location. Whenever users work with the alias, they are really working on the original item.

There are many instances in which creating an alias makes working within Livelink Intranet easier. For example:

- If you place an alias of a document stored in a project workbin in your My Stuff folder, you can quickly access it when you want to work with it instead of having to go into the project and locate the document (especially if it is nested several folders deep).
- If you attach an alias of a document to a workflow, users will work with the actual library document (instead of a copy of the document). When the workflow is complete, the manager will not need to retrieve the document from the attachments list since users worked with the original.

Making an Alias

You can make an alias of any type of item that is stored in the library. When you operate on an alias, you are really operating on the original item. Therefore, if you perform the Make Alias operation on an alias, you create an additional alias of the original item. When you perform the Make Alias operation on a generation, you make an alias of the original item the generation references, not the generation itself.

Once you create an alias, you can move it to any Livelink location to provide a shortcut for accessing the original.

To make an alias:

1. Navigate to the location containing the item of which you want to make an alias.
2. Click Info.
The Information About page displays.

3. Scroll down to the FUNCTIONS pane.

4. Click Make Alias.
The Add New Item/Add Alias page displays.

5. Enter a name for the alias in the Name field.
The default name is Original Item Alias. The name entered must be unique within the selected location. An alias name can contain up to 248 characters, including spaces, and cannot contain colon (:) characters.

6. If desired, add a description of the alias in the Description field.
Entering a description is optional.

7. Click the Add Alias button.
The Information About page for the original item is again displayed.

8. Click the Update button.
Generations

A generation is a reference to a particular version of an item. Creating a generation *freezes* the most current version so that future modifications to the item are not reflected in the generation. Generations can be made of documents and compound documents only.

The *Make Generation* function is available for a folder, but the operation doesn’t make a generation of the folder, it creates a new folder, making generations of all the documents and compound documents stored within. The *Make Generation* function is also available for a generation, but it creates a new generation that references the *current version* of the original item.

Generations provide a snapshot in time; they reflect the past. This is why Livelink Intranet does not allow you to modify a generation or create new versions of a generation.

When you create a generation of an item, Livelink Intranet *locks* the version the generation references, preventing the particular version of the item and the item itself from being deleted. For more information about versions, see the *Version Control* section, later in this chapter.

**Making a Generation**

You can make a generation of a document or compound document.

To make a generation:

1. Navigate to the location containing the item of which you want to make a generation.
2. Click *Info.*
   The Information About page displays.
3. Scroll down to the FUNCTIONS pane.
4. Click Make Generation.
The Add New Item/Add Generation page displays.

5. Enter a name for the generation in the Name field.
The default name is Original Item Generation. The name entered must be unique within the selected location. A generation name can contain up to 248 characters, including spaces, and cannot contain colon (:) characters.

6. If desired, add a description of the generation in the Description field.
Entering a description is optional.

7. Click the Add Generation button.
The Information About page for the original item is again displayed.

8. Click the Update button.
Permissions

Permissions define which users or groups can see, modify, and otherwise operate upon an item.

The basic procedure for defining permissions is to select which users and groups can access an item (the access list) and then define their level of permissions. Whenever an item is created, the following entries are automatically added to the access list:

- <Guest>—the group of all Livelink users
- <Creator>—where Creator is the name of the user who created the document
- <Base Group>—where Base Group is the base group of this document’s creator

You cannot delete any of these entries from the access list, but you can modify their permission levels.

In addition to these default permissions, any permissions defined for the folder in which the item is stored (the parent folder) are copied. You can modify these permissions, if needed.

Remember, however, that the <Creator> and <Base Group> permissions vary according to the creator of the item, not the parent folder. Therefore if Joe creates a folder, the Creator permission will read <Joe> and the Base Group permission will read <Joe’s Group>. If Kim adds a document to Joe’s folder, these permissions will read <Kim> and <Kim’s Group>; Joe will not necessarily have any permissions on Kim’s document, unless Kim specifically grants permissions.

Only users with Edit Permissions permission on an item can set the item’s permissions.
To set permissions:

1. Locate the item.
2. Click Info.
   The Information About page displays.
3. Scroll down to the FUNCTION pane.
4. Click Permissions.
   The Edit Permissions page displays.

The exact set of permissions displayed depends on the type of item selected. All users and groups who have permissions on the item are listed in the left frame. The permission setting for a particular user or group displays in the right frame when selected.
5. To add a user to the access list:
   a) Click Add User/Group.
      A list of all users and groups displays in the right frame.
   b) Select the check box to the left of each user or group you want to add.
   c) Click the Add To Access List button.
      The Access list is updated to display the added users and groups.

6. Define the permission level for a user or group. Permissions are additive, as indicated by nesting:
   a) Select the user or group name.
   b) Select the desired permissions check boxes.
      The check boxes displayed depend upon the type of item selected. For a summary of the permission types as a function of item type, see the end of this section.
   c) Click the Update button.

7. Repeat step 6 for each user or group in the Access List.

8. To delete an entry from the Access List, select the user or group name and then, click the Delete button.
9. To return to the Information About page for the item, click the item name link displayed at the top of the Access List.

You can define different permissions for each type of item. The following lists provide a summary of the permissions available for each type of library item.

**Folder Permissions**

Folder permissions allow users and groups to:

- **See**—see that the folder exists
- **See Contents**—see the items contained within the folder
- **Modify**—rename and modify the folder description (Properties)
- **Edit Permissions**—change other users’ and groups’ permissions
- **Edit Attributes**—change the category and modify attribute values
- **Delete**—delete the folder and its contents
- **Delete Versions**—delete version permission that is inherited by the items in the folder
- **Reserve**—reserve permission to be copied to items stored in the folder
- **Apply to all sub-items**—give all items stored in the folder before the permissions were set these new permissions

**Document Permissions**

Document permissions allow users and groups to:

- **See**—see that the document exists
- **See Contents**—view the contents of the document
- **Modify**—rename and modify the document description (Properties)
- **Edit Permissions**—change other users’ and groups’ permissions
- **Edit Attributes**—change the category and modify attribute values
- **Delete Versions**—delete versions of the document
- **Delete**—delete the entire document (all versions)
- **Reserve**—reserve and check out the document
Compound Document Permissions

Compound Document permissions allow users and groups to:

- **See**—see that the compound document exists
- **See Contents**—view the contents (structure) of the compound document
- **Modify**—rename and modify the compound document description (Properties)
- **Edit Permissions**—change other users’ and groups’ permissions
- **Edit Attributes**—change the category and modify attribute values
- **Delete Versions**—delete releases and revisions of the document
- **Delete**—delete the compound document
- **Reserve**—reserve the compound document
- **Add Items**—add subItems to the compound document

Workflow Map Permissions

Workflow Map permissions allow users and groups to:

- **See**—see that the workflow map exists
- **See Contents**—view the contents of the workflow map in the Map Editor
- **Modify**—rename and modify the workflow map description (Properties)
- **Edit Permissions**—change other users’ and groups’ permissions
- **Edit Attributes**—change the category and modify attribute values
- **Delete**—delete the map
- **Reserve**—reserve and check out the map
Query Permissions

Query permissions allow users and groups to:

- See—see that the query exists
- See Contents—view the contents of the query
- Modify—rename and modify the query description (Properties)
- Edit Permissions—change other users’ and groups’ permissions
- Edit Attributes—change the category and modify attribute values
- Delete Versions—delete versions of the query
- Delete—delete the entire query (all versions)
- Reserve—reserve and check out the query

URL Permissions

URL permissions allow users and groups to:

- See—see that the URL exists
- See Contents—view the contents of the URL
- Modify—modify the URL name and address (Properties)
- Edit Permissions—change other users’ and groups’ permissions
- Edit Attributes—change the category and modify attribute values
- Delete—delete the URL
Alias Permissions

Alias permission apply to the alias itself, not the original item of which the alias was made. Alias permissions allow users and groups to:

- **See**—see that the alias exists
- **See Contents**—view the contents of the original document
- **Modify**—rename and modify the alias description (Properties)
- **Edit Permissions**—change other users’ and groups’ permissions
- **Edit Attributes**—change the category and modify attribute values
- **Delete**—delete the alias

Generation Permissions

Generation permissions allow users and groups to:

- **See**—see that the generation exists
- **See Contents**—view the contents of the generation
- **Modify**—rename and modify the generation description (Properties)
- **Edit Permissions**—change other users’ and groups’ permissions
- **Edit Attributes**—change the generation’s category and modify attribute values
- **Delete**—delete the generation
Categories and Attributes

Livelink Intranet maintains system information for every item you create (name, creation date, last modification date, etc.). You can search for items by using any of these system attributes as criteria.

The Livelink administrator can create custom categories and attributes. Each category created has an associated set of attributes which define it. You can assign a custom category to an item so that custom attribute data is stored along with the system attribute data. You can then locate items based on the values of the custom attributes in addition to the standard system attributes.

Any user can view an item’s category and attributes by clicking the Expanded Info button on the Information About page. However, you must have Edit Attributes permission to assign a category or modify the attribute values. An item can belong to only one category.

To view an item’s category and attributes:

1. Locate the item.
2. Click Info.
   The Information About page displays.
3. Click the Expanded Info button.
   The Expanded Info About page opens.
4. Scroll down to the Custom attributes pane.
To edit an item’s category and attributes:

1. Locate the item.
2. Click Info.
   The Information About page displays.
3. Scroll down to the FUNCTION pane.

4. Click Edit Attributes.
   The Edit Attributes page displays.

The name and category of the item are displayed at the top of the page. The attributes belonging to the selected category are displayed at the bottom.
5. **To select a new category, make a selection from the Category popup.**
   The attributes associated with the category selected are displayed. Required attributes are displayed in italic type.

6. **Modify the desired attributes by entering or selecting new values.**

7. **Click the Update button.**
   The Information About page displays again. If you want to discard the changes you made, click the Reset button instead.

8. **Click the Update button.**
   If you want to discard the changes you made, click the Reset button instead.
Information About...

The Information About page is where Livelink Intranet allows you to:

- view and edit item properties
- access expanded information such as custom attributes or version information
- access various item functions such as Check-out or Edit Attributes

Properties provide attribute information about an item. The information stored, and whether or not it can be modified, depends upon the type of item.

To view or edit properties:

1. Locate the item.
2. Click Info.

The Information About page displays. The information displayed depends on the type of item selected. For example, this is an Information About page for a folder.
3. Modify the properties, as needed.
   Most properties cannot be edited.

4. If you want to examine more information about the item, click the Expanded Info… button.
   Depending on the type of item and the options set up for your database, the following information may be displayed:
   
   - **Custom Attributes**—the category selected and the values for all attributes associated with that category (if specified) are displayed. You can examine attribute values, and, if you have Edit Attributes permission on the item, modify them. For more information about editing categories and attributes, see the Categories and Attributes section, earlier in this chapter.
   
   - **Versions List**—a list of all previous versions of the item. Versions are displayed for documents, workflow maps, and queries only. You can access individual versions, if desired. For more information about versions, see the Version Control section, later in this chapter.
   
   - **References**—a list of all aliases (preceded by a blue arrow) and generations (preceded by an anchor icon) created from the item. Clicking a link in this table displays information about the selected alias or generation. For more information about aliases and generations, see the Aliases section and the Generations section, both presented earlier in this chapter.
   
   - **Audit**—a list of operations that have been performed on the item. The type of operations that are audited are determined by your system administrator. This information cannot be edited.

4. Click one of the following buttons:
   
   - **Update**—to save changes and close the page
   
   - **Reset**—to discard changes
   
   - **Delete**—to delete the item (see the Deleting an Item section)
Different properties are displayed for each type of item. The following lists provide a summary of the information shown for each type of item.

**Folder Properties**

The following property information is displayed for folders:

- **Name**—name of the folder (can be edited)
- **Owner**—name of the user who created the folder
- **Items**—number of items stored in the folder
- **Created**—date and time when the folder was created
- **Last Modified**—date and time when the folder was last changed
- **Category**—custom category chosen for the folder
- **Description**—additional information about the folder (can be edited)

**Document Properties**

The following property information is displayed for documents:

- **Name**—name of the document (can be edited)
- **Owner**—name of the user who added the document
- **Versions**—current version number and total number of versions
- **Max. Versions**—maximum number of versions that can be stored
- **Created**—date and time when the document was created
- **Last Modified**—date and time when the document was last changed
- **Location**—path to the document’s Livelink location
- **Category**—custom category chosen for the document
- **Status**—reserved or unreserved (if reserved, the name of the user who reserved it and the reservation date is also displayed)
- **Description**—additional information about the document (can be edited)
- **MIME Type**—file type and launching application (can be edited)
- **Size**—size, in bytes, of the document
Compound Document Properties

The following property information is displayed for compound documents:

- **Name**—name of the compound document (can be edited)
- **Owner**—name of the user who added the compound document
- **Created**—date and time when the compound document was created
- **Last Modified**—date and time when the compound document was last changed
- **Location**—path to the compound document’s Livelink location
- **Category**—custom category chosen for the compound document
- **Status**—reserved or unreserved (if reserved, the name of the user who reserved it and the reservation date is also displayed)
- **Description**—additional information about the compound document (can be edited)

Workflow Map Properties

The following property information is displayed for workflow maps:

- **Name**—name of the workflow map (can be edited)
- **Owner**—name of the user who created the workflow map
- **Created**—date and time when the workflow map was created
- **Last Modified**—date and time when the workflow map was last changed
- **Location**—path to the workflow map’s Livelink location
- **Category**—custom category chosen for the workflow map
- **Status**—reserved or unreserved (if reserved, the name of the user who reserved it and the reservation date is also displayed)
- **Description**—additional information about the workflow map (can be edited)
Query Properties

The following property information is displayed for queries:

- **Name**—name of the query (can be edited)
- **Owner**—name of the user who created the query
- **Versions**—current version number and total number of versions
- **Max. Versions**—maximum number of versions of the query that can be stored
- **Created**—date and time when the query was created
- **Last Modified**—date and time when the query was last changed
- **Location**—path to the query’s Livelink location in
- **Category**—custom category chosen for the query
- **Status**—reserved or unreserved (if reserved, the name of the user who reserved it and the reservation date is also displayed)
- **Description**—additional information about the query (can be edited)

URL Properties

The following property information is displayed for URLs:

- **Name**—name of the URL (can be edited)
- **Target URL**—URL’s Internet address (can be edited)
- **Owner**—name of the user who created the URL
- **Created**—date and time when the URL was created
- **Last Modified**—date and time when the URL was last changed
- **Location**—path to the URL’s Livelink location
- **Category**—custom category chosen for the URL
- **Description**—additional information about the URL (can be edited)
Alias Properties

Alias properties refer to the alias itself, not the original item. The following property information is displayed for aliases:

- **Name**—name of the alias (can be edited)
- **Owner**—name of the user who created the alias
- **Created**—date and time on which the alias was created
- **Last Modified**—date and time when the last change was made to the item the alias references
- **Location**—path to the Livelink location in which the alias is stored
- **Category**—custom category chosen for the alias
- **Description**—additional information about the alias (can be edited)

Generation Properties

The following property information is displayed for generations:

- **Name**—name of the generation (can be edited)
- **Owner**—name of the user who created the generation
- **Created**—date and time on which the generation was created
- **Last Modified**—date and time when the last change was made to the version the generation references
- **Location**—path to the Livelink location in which the generation is stored
- **Category**—custom category chosen for the generation
- **Status**—reserved or unreserved (if reserved, the name of the user who reserved it and the reservation date is also displayed)
- **Description**—additional information about the generation (can be edited)
Deleting an Item

Deleting an item removes it from the Livelink database. Livelink Intranet does not allow an item to be deleted if:

- it is referenced by a generation
- any versions are locked (documents, workflow maps, and queries only)
- it has been reserved by someone else (but you can delete an item that you have reserved)

If you delete a folder, all items inside the folder are deleted also. If a folder contains reserved items, you cannot delete it.

Deleting an item does not delete any aliases based on the item. Therefore, you may want to examine the item’s references (by displaying the Information About page and then clicking the Expanded Info button) before deleting it.

You must have Delete permission on the item to delete it.

To delete an item:

1. Locate the item.
2. Click Info.
   The Information About page displays.
3. Click the Delete button.
   A dialog box opens asking you to confirm your choice.
4. Click the OK button.
Renaming an Item

Renaming an item assigns a new name to the item. Renaming has no effect on any alias or generation created from the item. You must have *Modify* permission on the item you want to rename.

To rename an item:

1. Locate the item.
2. Click *Info*. The *Information About* page displays.
3. Enter the new name in the *Name* field. The name entered must be unique within the location in which the item is stored. An item name can contain up to 248 characters, including spaces, and cannot contain colon (:) characters.
4. Click the *Update* button.
Fetching an Item

Livelink allows documents and generations of documents to be fetched. Fetching an item retrieves the document content from the database and passes it to your Web browser for interpretation. What happens to the item from there depends on the item’s MIME type, and the “helper preferences” you have established.

MIME types allow your browser to identify a file, even if there is no file extension or if it cannot read the Macintosh internal file type. When you add a document to the database, Livelink maps a MIME type to the file. You can examine the MIME type selected and modify it (if you have Modify permission) by clicking the Info link displayed to the right of the document name.

When you fetch an item, Livelink retrieves the file associated with the item and passes it to your Web browser. If a helper preference has been established for the document’s MIME type, the browser then takes the appropriate action, for example, launching an application or displaying the file in the browser window. If no preference is established, fetching a document copies it to your desktop.

You can fetch an item from a Library page or from the item’s Information About page. To fetch an item do either of the following:

- Locate the desired document or generation and click its name. Document and generation names are displayed as a links; clicking them fetches them.
- On the item’s Information About page, scroll down to the FUNCTIONS pane and click Fetch.
Viewing an Item

Documents and generations can be viewed. When you view an item, Livelink retrieves the file from the database, passes it through a viewing filter which outputs an HTML representation of its contents, and then passes the HTML page to your browser where it is displayed.

**Note** Some document contents, particularly complex graphics and formatting, may not be preserved in the HTML representation.

Livelink contains viewing filters for many common document types. If you attempt to view a document for which an appropriate filter cannot be found, an error message is displayed indicating that the item cannot be viewed.

You must have See Contents permission on the item to view it.

To view an item:

1. Locate the document or generation.
2. Click View.
   You can also view an item from its Information About page by scrolling down to the FUNCTION pane and clicking View.
3. When you are done viewing the item, click your Web browser's Back button to return to Livelink Intranet.
Reserving and Unreserving an Item

Reserving an item write locks it, preventing others from changing it. Documents, compound documents, workflow maps, and queries can be reserved.

Unreserving an item releases the write lock on it, allowing other users to access and modify it. Typically, you would unreserve an item if:

- You had previously reserved it and now want to release the write lock.
- You had checked the item out and want to return it to the library, discarding any changes that were made.

You must have Reserve permission on an item to reserve it and the item cannot already be checked out or reserved by another user.

To reserve an item:

1. Locate the item.
2. Click Info.
   The Information About page displays.
3. Scroll down to the FUNCTION pane.
4. Click Reserve.
   Livelink reserves the item for you. The Information About page updates, replacing the Reserve link with the Unreserve link and updating the Status field.
5. Click the Update button.
   The Information About page closes and the Library page is again displayed. The item you just reserved now has a small red arrow preceding its icon to indicate that it is reserved.
To unreserve an item, follow either procedure:

- **Unreserve the item from the Library page.**
  1. Locate the original reserved or checked out item. It has a red check mark preceding its document icon.
  2. Click *Info*. The Information About page opens.
  3. Click *Unreserve*. Livelink unreserves the item. The Information About page updates, replacing the *Unreserve* link with the *Reserve* link and updating the Status field.
  4. Click the *Update* button.

- **Unreserve the item from the Checked-Out Items page.**
  1. From the Go to popup displayed at the bottom of every page, select *Checked-Out Items*. The Checked-Out Items page displays.
  2. Click *Unreserve*.
Checking a Document Out and In

Checking a document out reserves it and then copies it from its current location to your desktop where you can work with it. This allows you to make changes to the document while preventing other users from making changes.

Once you check a document out, you can then open it, on your desktop in its native application, and modify it. When you have completed the modifications, you can check it back into Livelink Intranet, saving a new version of the document to the Livelink database.

You must have Reserve permission on an item to check it out and the item cannot already be checked out by another user.

Checking Out

To check out an item:

1. Locate the item.
2. Click Info.  
   The Information About page displays.
3. Scroll down to the FUNCTION pane.
4. Click Check-out.  
   A dialog box opens allowing you to select a desktop location for the checked out document.
5. Specify a location and click Save.  
   A progress dialog box is displayed as Livelink Intranet copies the file to your desktop.
6. Click the Update button.  
   The Information About page closes. The Library page is again displayed and the document you just checked-out will have a red check mark preceding its icon.
The Checked-Out Items Page

The Checked-Out Items page displays all items you have checked out or reserved, regardless of whether you checked the item out using the Web client or the Wide client.

To open the Checked-Out Items page, do either of the following:

- From the Go to popup, select Checked-Out Items.
- From the Administration page, click the Checked-Out Items link.

This page displays a list of the items you have checked out or reserved. Although you can only check out documents using the Web client, other types of items you may have checked out or reserved using the Wide client are also displayed.

Document names are displayed as links; clicking them fetches the document.

Clicking the Check-in link checks an item in. Only documents can be checked in using the Web client. For more information, see the next section, Checking In.

Clicking the Unreserve link removes the write lock from the item. Any type of item can be unreserved. For more information see the Reserving and Unreserving an Item section, earlier in this chapter.
Checking In

Once you have finished making modifications to a document, you should check it back in. Doing so creates a new (current) version of the document that includes your changes. For more information about versions, see the Version Control section, later in this chapter.

If you want to discard the changes made to the document while it was checked out, you can Unreserve the document instead of checking it back in. Doing so removes the write lock on the original document without creating a new version. For more information about unreserving a document, see the Reserving and Unreserving an Item section, earlier in this chapter.

To check a document in, do either of the following:

1. Select the document to be checked in by doing either of the following:
   - Locate the original document in Livelink Intranet (it has a red check mark preceding its icon). Click Info, scroll down to the FUNCTIONS pane, and click Check-in.
   - Open the Checked-Out Items page and click the Check-in link following the name of the document you want to check in.

   The Check-In page displays.

   ![Check-in Page](image)

   2. Either enter the name (including full path) to the desktop document or click the Browse button to locate and select the document.

   3. Click the Check-in button.
Version Control

When you check out, modify, and then check in a document, workflow map, or query, Livelink Intranet adds the changed item as a new version, but still retains the previous versions (workflow maps and queries can be checked out using the Wide client only). By default, the current version is presented when you access an item, but, you can retrieve previous versions, if needed.

Versions provide a running history of changes made to an item. Since they reflect the past, you cannot modify them. However, to revert to a previous version, copy the previous version to your desktop and add it as a new version. This makes it the current version, creating a new starting point for editing.

Setting the Version Limit

By default, Livelink Intranet allows an unlimited number of versions to be created, creating a new one and adding the old one to the list, each time an item is modified. You may want to set a version limit, thereby limiting the number of previous versions retained.

If you set a version limit and saving a new version would result in exceeding the version limit, Livelink Intranet drops the oldest version from the list and saves the new version, thereby keeping the desired number of versions. Livelink Intranet, however, does not count locked versions in the version count—an unlimited number of locked versions are retained.

You must have Delete Versions permission on an item to set the version limit.
To set the version limit:

1. Locate the item.
2. Click Info.
   The Information About page displays.
3. Enter the desired number of versions in the Max Versions field.
4. Click the Update button.

Displaying Versions

The Expanded Information page displays a list of all versions of a document, workflow map, or query. If a generation is selected, all versions of the original document (not just the generation) display.

To view a list of Versions:

1. Locate the item.
2. Click Info.
   The Information About page displays.
3. Click the Expanded Info… button.
4. Scroll down the page to the Versions pane.

![Versions List](image)

<table>
<thead>
<tr>
<th>Version</th>
<th>Locked</th>
<th>File name</th>
<th>Size</th>
<th>Created By</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>No</td>
<td>Index.doc</td>
<td>47.00 KB</td>
<td>JillB</td>
<td>12/11/96 04:31 PM</td>
</tr>
<tr>
<td>2</td>
<td>No</td>
<td>Index.html</td>
<td>47.00 KB</td>
<td>JillB</td>
<td>12/11/96 04:29 PM</td>
</tr>
<tr>
<td>1</td>
<td>No</td>
<td>Index</td>
<td>47.00 KB</td>
<td>JillB</td>
<td>12/02/96 03:18 PM</td>
</tr>
</tbody>
</table>

Enter the number of versions to keep: 1

Purge Versions

All versions of the item are listed with the most recently created versions listed first.

5. To examine a version in more detail, click the version number. The Version Info page displays.

![Version Info](image)
The version properties are displayed on this page. At the bottom of the page are function links that allow you to perform operations on the version. The functions displayed depend upon the type of item:

- documents—View and Fetch
- workflow maps—Initiate
- queries—Run

For more information about the View and Fetch functions see the Viewing an Item and Fetching an Item sections, earlier in this chapter. For more information about initiating a workflow map, see the Initiating a Workflow section in Chapter Four, Workflow. For more information about running a query, see the Searching section in Chapter Two, Search.

6. To lock or unlock the version, select a value from the Status popup. Locking a version prevents it from being deleted.

7. Modify the MIME Type or Description, as desired.

8. If you made changes to the status, MIME type, or description that you want to save, click the Update button.

Deleting a Version

You can delete any unlocked version if you have Delete Versions permission on the item. When you delete a version, Livelink Intranet does not renumber the remaining versions.

To delete a version:

1. Open the Version Info page by clicking the version number on the Expanded Info About page for the item.

2. Scroll down to the bottom of the page and click the Delete button. A dialog box opens asking you to confirm your choice.

3. Click the OK button. The version is deleted. The Version Info page closes and the Expanded Info About page for the item is again displayed.
Purging Versions

Purging versions batch deletes old versions so you do not have to delete them one by one. When you purge versions, you specify the number of versions to keep, retaining the most recent versions (you must retain at least one version). For example, if an item has ten versions and you elect to purge five, versions 1 through 5 are deleted; versions 6 through 10 are retained.

Livelink Intranet does not count locked versions or versions on which generations are based. If, of the five oldest versions in the previous example, versions 1 and 2 were locked, versions 3 through 7 would be deleted instead.

You must have Delete Versions permission on an item to purge versions.

To purge versions:

1. Locate the item.
2. Click Info.
The Information About page displays.
3. Click the Expanded Info… button.
The Expanded Info About page displays.
4. Scroll down the page to the Versions pane.

<table>
<thead>
<tr>
<th>Version</th>
<th>Locked</th>
<th>File name</th>
<th>Size</th>
<th>Created By</th>
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<tr>
<td>3</td>
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<td>Index.doc</td>
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<td>2</td>
<td>No</td>
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<td>47.00 KB</td>
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<td>12/11/96 04:29 PM</td>
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<tr>
<td>1</td>
<td>No</td>
<td>Index</td>
<td>47.00 KB</td>
<td>JillB</td>
<td>12/02/96 03:18 PM</td>
</tr>
</tbody>
</table>

All versions of the item are listed with the most recently created versions listed first.

5. Enter an integer value in the Enter the number of versions to keep field and then click the Purge Versions button.
The value you enter must be greater than zero. Livelink deletes the oldest unlocked versions and updates the Expanded Info About page to display the new version set.
Adding a Document Version

Livelink Intranet automatically creates a new document version whenever you check a document back in. However, you can manually create a new version, if needed. Doing so allows you to add any electronic file from your desktop as a new (and the current) version of the document.

You might want to use the Add Version function if, for example, you fetched a document to your desktop and modified it, instead of checking it out first. You could then add the modified file as a new version.

Since adding a version may delete an older version (if the version limit is reached), you must have Delete Versions permission on an item to add a version.

To add a document version:

1. Locate the item.
2. Click Info.
   The Information About page displays.
3. Scroll down to the FUNCTION pane.
4. Click Add Version.
   The Add Version page displays.

   ![Add Version Page]

   Select a file for the new version:

   Browse...
5. Either enter the name (including full path) to the desktop document or click the Browse button to locate and select the document.

6. Click the Add Version button.
Livelink adds the version. The Add Version page closes and the Information About page is again displayed, with the Version field updated to reflect the new number of versions.
Chapter Four
Workflow
Overview

This chapter describes the Livelink Intranet Workflow module. A workflow is an electronic representation of a process which automatically routes task assignments to Livelink Intranet users. Although you can create workflow maps using the Livelink Wide Client only, you can access most other workflow functionality using the Web Client.

The workflow component of Livelink automates your work process and allows you to focus on performing the work itself. Whether the work process is highly structured and controlled or loosely structured and flexible, the workflow component delivers virtual feedback, provides hands-on control, and allows you to improve the quality and efficiency of your work.

Workflow is built around the concept of the work package—an object that contains items (documents, compound documents, spreadsheets, and so on), attributes, a definition of the path upon which the work must travel from creation to completion, and a schedule for how long the process should take.

The major workflow components are:

- **Maps**—The workflow map defines the “who, what, how, and when” of the workflow—the path upon which work travels from user to user, the items with which these users work, the instructions that each user should follow, and the date upon which work should be completed.

- **Status**—Livelink Intranet allows you to monitor and change the status of a workflow that you initiated or manage. You can verify that work is being done in a timely manner, supervise the work that is being done, and alter the steps within the path of the workflow, if needed.

- **In Box**—Each user’s In Box is where he or she receives new work. When you receive a task, you should read your instructions, and begin working on it. You can return the work package to your In Box for later completion, or send it on to the next step when the work is completed.

Using the Web Client, you can initiate or manage a workflow, monitor its status, and work on workflow task assignments that appear in your In Box. Presently, creating a new workflow map and making structural changes to existing maps can only be done using the Livelink Intranet Wide client.
In Box

Your In Box is where you receive new work—it is also a storage area for workflow tasks and project tasks that have been sent to you or to a group of which you are a member. Unlike the Wide client, the Web client does not require you to perform an explicit Accept operation before working on a task assigned to your group.

The basic procedure for working with a workflow task in your In Box is to:

- locate the workflow task in your In Box and open it up
- work on the task, save it, and then return it to your In Box
- repeat the work on/save cycle as needed to complete the task
- when you complete the task, send it on to the next user

To work on a task:

1. Do either of the following:
   - Click the In Box button on the Livelink button bar
   - From the Go To popup, select In Box

   The In Box page displays.

Both workflow tasks and project tasks are displayed on your In Box page. Workflow tasks are preceded by a light bulb icon.
The following information displays about each task:

- Task—the name of the project or workflow task
- Status—the status of the task (OK, Step Late)
- Due Date—the date by which you should complete all work on the task
- Process or Project—the name of the project or workflow, of which the step assignment is a part

In some instances, the workflow name (listed in the Process or Project column) displays as a link. In this case, you have permission to view the status of the workflow. When you click the workflow name link, the Workflow Details page displays. For more information, see the Workflow Status section.

2. To work on the task, click the task name link. The Step Assignment page displays.

3. Examine the general task information.

| Step Name: | Chicago office | Received: | 12/12/1996 |
| Manager: | JillB | Step Due Date: | 12/18/1996 |
| Started: | 12/10/1996 | Workflow Due Date: | 12/31/1996 |

This information is displayed at the top of the page. It includes:

- Step Name—the name of the task
- Manager—the name of the person to whom you should go to if you have questions about the task
- Started—the date on which the workflow was initiated
- Received—the date on which the task entered your In Box
- Step Due Date—the date by which you should finish the task
- Workflow Due Date—the date by which the entire workflow is due
4. Examine your Task Instructions.

**Task Instructions:**

*Don't forget to talk to the guys who worked with the Asian user's group before you finalize the troubleshooting section.*

The task instructions contain information about what you need to do to complete the task.

**Attachments**

The attachments section provides access to all of the items (documents, folders, and so on) that are included as part of the work package. You can add attachments, if needed. You can perform any of the operations on the attached items that you can normally perform on an item of that type. For more information about these operations, see Chapter Three, *Library*.

To work with attachments:

1. Open the Step Assignment page.
2. Scroll down the page to the Attachments pane.

Your task may or may not have items attached to it. If there are attachments, they appear below the Additional Attachments fields and Browse button.
3. To attach a document from your desktop, either enter the document name (including full path) in one of the fields, or click the Browse button to locate the item from your desktop. You can enter up to two documents at a time. If you wish to add more, you must click the Update button at the bottom of the page and then return to this step and add more items.

4. To work with an attachment, click the Info button displayed to the right of the attachment name. An Information About page displays for the item. The attributes displayed can be modified, if you have the proper permissions. You can scroll down to the FUNCTIONS pane and perform operations on an attachments, just as you would for an item stored in the Livelink library. For more information, see Chapter Three, Library.

Attributes

Attributes are values that the manager of the workflow wants you to see and/or edit. The attributes that are included with a task are defined by the designer of the workflow map of which the task is a part. Therefore, the Attributes pane may look different for every workflow task, or may be absent altogether.

Attributes can be displayed as text boxes, check boxes, or popups and can be:

- **Read Only Attributes**—display as text. You cannot edit these attributes.

- **Editable Attributes**—display as entry fields or popups. You can modify these attributes, clear their values, or leave the default values provided.

- **Required Attributes**—display as entry fields or popups. You must enter a value for each attribute before you can complete the task and send it on to the next user.
To work with attributes:

1. Open the Step Assignment page.
2. Scroll down to the Attributes pane.
   The Attributes pane contains various fields and popups that allow you to enter or select values.

3. Modify the attributes as needed.
   Attributes displayed in italic type are required attributes. You must enter a value before you will be allowed to send the task on to the next user.

4. To save changes to the attributes, click the Update button at the bottom of the page.
Comments

Comments can be entered by any user who works on the workflow. If the initiator of the workflow assigned you the proper permissions, you can also view the comments entered by previous users who worked on the workflow.

To work with comments:

1. Open the Step Assignment page.
2. Scroll down to the Comments pane.

![Comments pane]

3. Enter any comments you want to add in the large text box. The text automatically wraps as you enter your comments.
4. If displayed, examine the comments entered by previous users. If you have been granted permission to view previous comments, they are displayed below the comment entry text box. Each comment is identified by the name of the step, the user who entered it, and the date on which it was entered.
5. To save comments you entered, click the Update button at the bottom of the page.
Delegating a Task

Delegating a task allows you to select another user to work on the task, instead of you. When you delegate a task, it is removed from your In Box and is placed in the In Box of the user you choose. When the new user finishes the task, it is sent on to the next user; it does not return to you.

You must have the proper permissions to delegate a task. Delegating your task is reflected in the workflow manager’s Workflow Status page.

To delegate a task:

1. Open the Step Assignment page.
2. Scroll down to the bottom of the page and click the Delegate… button. The Delegate to… page displays.
3. Select the user or group to which you want to delegate the task. You may need to scroll down to see all users and groups.
4. Click the Delegate button.
   Your In Box again displays, but the task is removed. It now appears in the In Box of the selected user or group.

**Sending a Task for Review**

Sending a task for review sends it to another user or group to work on it, then returns the task to you, allowing you to work on it again. When you send a task for review, it is removed from your In Box and is added to the In Box of the user or group to whom it was sent. When completed, the task returns to you.

You must have the proper permissions to send a task for review. Sending your task for review is reflected on the workflow manager’s Workflow Status page.

To send a task for review:

1. Open the Step Assignment page.
2. Scroll down to the bottom of the page and click the Review… button.
   The Send for Review… page displays.
3. Select the user or group you to which you want to send the task.
   You may need to scroll down to see all users and groups.

4. Click the **Send for Review** button.
   Your In Box again displays, but the task is removed. It now appears in the In Box of
   the selected user or group.

*When You are Done…*

When you are done working on a workflow task you can either return it to
your In Box so you can work on it again later, or remove it from your In Box
and send it on to the next user.

To return the task to your In Box, you can click either of the following buttons:

- *Reset*—to reset all values back to the most recently saved values and
  then return the task to your In Box
- *Update*—to save all modifications you made to the task and then return
  it to your In Box

If you have finished all work you are going to do on a task and want to remove
it from your In Box, you should send it on to the next user. Be careful when you
decide to send a task on. Doing so removes it from your In Box, preventing you
from accessing it any further.

Which button you should click to send a task on depends on how the manager
set up your task:

- If there is a *Send On* button—you should click it to remove the task from
  your In Box and send it on to the next user.
- If there is no *Send On* button—there will be two or more disposition
  buttons to the right of the *Update* button. These buttons may be labeled
  *Approve* and *Reject* (these are the default labels). However, the designer
  of the workflow map can rename these buttons and add more buttons.
  Therefore you may have a different set of choices available. Regardless of
  the number or labels of these buttons, clicking one of them first,
  registers your opinion of the task and then removes the task from your
  In Box and sends it on.

In addition to these buttons, there may be a *Delegate* and a *Review* button
displayed. For more information, see the *Delegating a Task* and *Sending a Task
for Review* sections, earlier in this chapter.
Initiating a Workflow

Initiating a workflow creates a new work process based on the work definition stored in a workflow map. You cannot create new workflow maps using the Web Client (the functionality is currently provided on the Wide Client only), but you can initiate workflows based on existing workflows maps.

Workflow maps are stored in various places throughout Livelink Intranet—in the Library, in your My Stuff folder, in a Project workbin, or on the Workflows page. This section specifically discusses the Workflows page, but it also applies to workflow maps stored in other locations as well.

The Workflows page provides a central storage location for workflow maps that any user can initiate. The workflow maps found on the Workflows page may have been placed there by your system administrator or by any other user using the Wide Client.

To initiate a workflow:

1. Click the Workflows button on the Livelink button bar or select Workflows from the Go To popup at the bottom of the page. The Workflows page displays listing workflow maps by name and creation date.

   ![Workflow Map Example](image)
2. To initiate a workflow do either of the following:
   - If you want to view information about the workflow map before initiating it, click Info. On the Information About... page that displays, scroll down to the FUNCTIONS pane and click Initiate.
   - To simply initiate the workflow, click Initiate.

The Initiate a Workflow... page displays.

3. Enter a title for the workflow in the Title field. The name can, but need not be, different from the name under which the workflow map was saved. When you enter a title, it assigns the title to the work process, but does not affect the name of the stored workflow map. Assigning a descriptive name may help you to keep track of all workflows you have in progress.
4. To attach a document from your desktop, either enter the document name (including full path) in one of the Additional Attachments fields, or click the Browse button to locate the document on your desktop. You can enter one or two documents.

Workflow maps may have items attached as part of the map definition by the Wide Client user who created the map. If this is the case, the documents display below the document fields. You cannot delete these items.

5. Enter any comments about the workflow in the Comments text box. Comments are optional.

6. Click the Initiate button
   If successful, a message appears informing you that your workflow has been successfully initiated. You can then monitor the status of the workflow in progress through the Status page.

7. Make a selection from the Go to popup to clear the message.
Workflow Status

Livelink allows the status of a workflow to be monitored at all times. Granting management privileges to managers and initiators (done on the Wide Client as part of the workflow map definition) allows them to:

- verify that work is being done in a timely manner
- supervise the work that is being done
- archive, delete, stop, or suspend the workflow

You can be granted management privileges on a workflow by being personally chosen as the manager of the workflow, by receiving management permissions as the initiator of a workflow, or by belonging to a group to which management responsibility was assigned.

Viewing the Workflow Status Page

The Status page displays a list of all workflows that you are managing, either personally or through management group membership.

To view a list of all workflows you are managing:

1. Do either of the following:
   - Click the Status button on the Livelink button bar
   - From the Go To popup, select Status

   The Status page displays.
For each workflow, the following information displays:

- **Status**—OK, step late, milestone late, suspended, stopped, or completed
- **Title**—the title assigned to the workflow at initiation
- **Performer**—the name of the user performing the task assignment, or Multiple if several users are working on it at once
- **Relationship**—your relationship to the workflow (Manage or Initiate)

By default, all executing workflows that you manage or have initiated are displayed. However, you can change which workflows display.

2. To change which workflows are displayed based on your relationship to them, make a selection from the Show popup:
   - **All**—displays all workflows you manage and all workflows you initiated
   - **Managed**—displays all workflows you manage
   - **Initiated**—displays all workflows you initiated
3. To change which workflows are displayed based on their execution status, select one of the following radio buttons:

- **Not Archived**—displays all workflows that have not been archived (regardless of whether they are executing, stopped, or suspended)
- **Executing Only**—displays only those workflows that are currently executing
- **Archived**—displays only those workflows that are no longer executing and have been archived

### Viewing Workflow Details

The Workflow Details page contains detailed status information about a workflow overall and provides access to status information about the individual tasks within a workflow.

The Workflow Details page contains three sections:

- General Workflow Information
- Graphical Status Display
- Detailed Workflow Steps Report
- Attachments
- Attributes

To view the Workflow Details page:

1. Open the Status page.
2. Click the title of the workflow you want to examine.

   The Workflow Details page displays.
At the top of the page are the following non-editable fields:

- Workflow—the title of the workflow
- Initiator—the name of the user who initiated the workflow
- Date Initiated—the date and time on which the workflow was started
- Due Date—the date by which the entire workflow should be completed
- Completed—the date and time on which the workflow was completed, or <Awaiting completion>
- Description—a brief description of the purpose or intent of the workflow

Beneath these fields are buttons that allow you to modify workflow execution. Which buttons display depends upon the current status of the workflow.

- Stop—permanently stops a workflow
- Suspend—temporarily stops a workflow (it can be restarted)
- Resume—restarts a suspended workflow
- Delete—removes a stopped or completed workflow
- Archive—saves a stopped or completed workflow

All of these functions are explained in more detail in the Changing Workflow Execution section.
3. Scroll down the page to examine the Graphical Status Display.

The Graphical Status Display is available only if you are running Livelink Intranet under a Java-enabled Web browser. It is a graphical representation of each task that makes up the workflow and shows the progress made.

All workflow tasks and their due dates display. The Graphical Status Display indicates which steps are:

- Completed—signified by a line of arrows through the step and the addition of its completion date beneath the due date
- Currently in progress—signified by a green box around the step
- Not taken—as the result of a conditional step (sent for review, rejected), signified by an “X” through the step
- Waiting for execution—signified by the absence of a completion date

You cannot edit the Graphical Status Display. You can view detailed information about a particular step by clicking the step icon.
4. Scroll down the page to examine the Detailed Workflow Steps Report.

**Detailed Workflow Steps Report**

<table>
<thead>
<tr>
<th>Step</th>
<th>Performer</th>
<th>Due</th>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start step</td>
<td>JillB</td>
<td>06/10/1996</td>
<td>06/10/1996</td>
</tr>
<tr>
<td>Miki - Dev review</td>
<td>Bruce</td>
<td>06/18/1996</td>
<td>06/19/1996</td>
</tr>
<tr>
<td>New graphics added</td>
<td></td>
<td>06/19/1996</td>
<td>06/19/1996</td>
</tr>
<tr>
<td>JillB</td>
<td>JillB</td>
<td>06/25/1996</td>
<td>None</td>
</tr>
<tr>
<td>Ready for Print</td>
<td></td>
<td>06/25/1996</td>
<td>None</td>
</tr>
<tr>
<td>BeverleyG</td>
<td>BeverleyG</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

It contains the same information as the Graphical Status Display area, but in a table format with four columns of information:

- **Step**—the name of the workflow step
- **Performer**—the name of the user performing the task (it may or may not be the same as the step name if the task was assigned to a group, sent for review, or delegated)
- **Due**—the date on which the task is or was due
- **Done**—the date on which the task was completed or “None” if the task has not been completed

You can view detailed information about a particular step by clicking the step name link.
5. Scroll down the page to examine the Attachments.

You can add attachments by entering their names in the Additional Attachments fields or operate on the current attachments by clicking one of the links to the right of the attachment name.

6. Scroll down the page to examine the Attributes.

You can modify the attribute values, if needed.
7. Click one of the following buttons:
   - Update—to save any changes you have made and close the Workflow Details page
   - Reset—to discard any changes you have made
   - Back—(your Web browser’s Back button) to discard any changes you have made and close the Workflow Details page

Changing Workflow Execution

Livelink Intranet allows a manager of a workflow to change its execution. You can:

- **Suspend a workflow**—temporarily halt a workflow while retaining the ability to restart it again later
- **Resume a workflow**—restart a suspended workflow
- **Stop a workflow**—permanently halt an active workflow

Suspending a Workflow

If given the proper permissions, you can suspend the execution of a workflow. Doing so temporarily stops workflow execution and removes the work assignment from the In Boxes of the users performing the current task assignment.

To suspend a workflow:

1. Open the Status page.
2. Click the title of the executing workflow you want to suspend. The Workflow Details page displays.
3. Click the Suspend button. A dialog box displays asking you to confirm your choice.
4. Click the OK button.

Once you suspend a workflow, you can later:

- **Resume execution**—start up again where execution left off
- **Stop execution**—permanently stop all workflow execution

**Note** You can resume execution of suspended workflows, but stopped workflows cannot be restarted. For that reason, you should choose carefully between the two operations.
Resuming a Workflow

If given the proper permissions, you can resume the execution of a suspended workflow. Doing so reactivates execution of the workflow from the point at which it was previously suspended.

To resume a workflow:

1. Open the Status page.
2. Click the title of the suspended workflow you want to resume. The Workflow Details page displays.
3. Click the Resume button. A dialog box displays asking you to confirm your choice.
4. Click the OK button.

Stopping a Workflow

If given the proper permissions, you can stop the execution of a workflow. Doing so permanently stops workflow execution and removes the step assignment from the In Boxes of all users currently performing task assignments.

!Note You can resume execution of suspended workflows, but stopped workflows cannot be restarted. For that reason, you should choose carefully between the two operations.

To stop a workflow:

1. Open the Status page.
2. Click the title of the workflow you want to stop. The Workflow Details page displays.
3. Click the Stop button. A dialog box displays asking you to confirm your choice.
4. Click the OK button.

Once you stop a workflow, you can then:

- Archive it—mark it as saved so that you can remove it from your Workflow Status page display
- Delete it—remove it entirely from the Livelink Intranet database
Completed and Stopped Workflows

A workflow finishes executing by reaching the end of the workflow path (referred to as a completed workflow) or by being stopped by one of its managers (referred to as a stopped workflow).

Once a workflow has been completed or stopped, you can archive it or delete it.

Archiving a Workflow

If given the proper permissions, you can archive a completed or stopped workflow. Doing so marks the workflow as archived, allowing you to filter it out of the display in the Workflow Status page. Even though a workflow is archived, you can still access it and the work package attached to it, by examining it from the Workflow Details page.

To archive a workflow:

1. Open the Status page.
2. Click the title of the stopped or completed workflow you want to archive.
   The Workflow Details page displays.
3. Click the Archive button.
   A dialog box displays asking you to confirm your choice.
4. Click the OK button.

Deleting a Workflow

If given the proper permissions, you can delete a completed or stopped workflow. Doing so removes it not only from the Workflow Status page, but deletes it from the Livelink Intranet database.

!Note If you delete a workflow, the work package, including all attachments, are deleted. You cannot undo a workflow deletion.

To delete a workflow:

1. Open the Status page.
2. Click the title of the stopped or completed workflow you want to delete.
   The Workflow Details page displays.
3. Click the Delete button.
   A dialog box displays asking you to confirm your choice.
4. Click the OK button.
Chapter Five
Projects
Livelink Projects facilitate collaboration among users who are working together on a set of tasks. Projects create an electronic *meeting place* for project team members, departments, or other groups of users with a common interest. Unlike workflows which have dependent sequences of tasks, projects assist and organize the concurrent efforts of peers.

Projects allow people to work together, store documents and other information about a project in one easily accessible place, communicate about the issues involved in the project, and distribute work assignments to project team members. Every project consists of the following components:

- **Home Page**—The project home page is your home base for a project. It is through the home page that you can access the project workbin, member list, discussions, task list, and bulletin board.

- **Workbin**—The project workbin is a shared storage area where users can save and share folders, documents, compound documents, workflow maps, and queries.

- **Members**—Every project has an associated list of members (the users who are working to complete the project tasks).

- **Discussions**—Project discussions facilitate communication among members of the team by organizing messages into topics and replies.

- **Tasks**—Project tasks define what must be done to complete the project by creating work assignments.

- **Bulletin Board**—The project bulletin board provides a place where project members can post notes for each other.

Any user with the proper permission can create a new project, open projects, work on the items found in the project workbin, read and answer discussions, and work on assigned tasks.
The Projects Page

The Projects page lists all projects of which you are a member. From this page, you can access the particular project on which you want to work.

To display the Projects page do either of the following:

- Click the Projects button on the Livelink button bar.
- From the Go to popup, select Projects.

Projects display alphabetically, by name, followed by a summary of the project contents, including:

- Tasks—this link takes you directly to the project’s Task List page. The number of active tasks out of the total number of tasks displays.
- Discussions—this link takes you directly to the project’s Discussions page. The number of unread discussion topics or replies out of the total number of topics and replies displays.

Following these links, Livelink Intranet presents a brief description of the project.
Creating a Project

Create a project to define a new collaborative work effort. In doing so, you create a project workbin to store and share folders, documents, compound documents, workflow maps, URLs and queries, a task list containing project assignments, a project discussion forum for addressing issues, and a bulletin board for posting notes.

You can create a new project if you have the *Create Projects* privilege on your user account. Upon creation, you become the project leader and can:

- define the membership list
- edit any task or bulletin board note
- delete discussion topics and replies
- change the project leader

To create a new project:

1. On the Projects page, click the New Project link.
   The New Project page displays.

2. Enter a name for the project in the Project Name field.
3. If desired, enter a description of the project in the Description field.
   A description is optional.
4. Click the Create Project button.
   The Projects page displays, showing your newly-created project. Initially, you are the only project member. See the Members section, later in this chapter, for information about adding members to the project.
Opening a Project

Opening a project allows you to view the project and work with its contents. When you open a project, the project’s home page displays. The project home page is your *home base* for a particular project and provides access to the bulletin board, membership list, task list, discussions, and workbin.

To open a project’s home page:

- On the Projects page, click the name of the project you want to access. The project’s home page displays.
At the top of the Project Home Page (and every project page) are seven buttons. Click them to access the following areas:

- **Project Home**—the project home page
- **Bulletin Board**—a place where you can post notes to other members of the project group
- **Discussions**—a place to carry on written discussions concerning the project
- **Tasks**—a list of the tasks associated with the project
- **Project Workbin**—a storage area for folders, compound documents, documents, workflow maps, URLs, and queries stored in the project
- **Members**—a list of the users on the project team
- **Livelink Home**—the main home page for Livelink Intranet

The following information about the project displays on the project home page:

- **Leader**—the leader of the project
- **Created**—the date and time the project was created
- **Members**—the numbers of users and groups belonging to the project
- **Discussions**—the total number of discussion topics and replies, and the number that you have not read
- **Tasks**—the total number of tasks and the number which are active

The E-Mail To All Members link allows you to compose and send a message to all members of the project. Click it to open your Web browser’s E-Mail page.
Customizing the Project Home Page

Livelink Intranet allows you to replace any project home page with a custom designed home page. If you do so, contents of the bottom frame of the project home page are replaced. The top frame, which includes the project name and the buttons providing access to the project, are not modified.

A custom project home page can be created using the HTML editor in which you are most comfortable working. Once created, you can replace the standard project home page with your home page by placing it in the project workbin.

If you want to use the standard Livelink Intranet project home page, but make a few changes to it, see the *Customizing the Web Client Developer’s Guide*. Livelink Intranet pages are not static HTML pages—they are built, on request, from Livelink HTML templates, created and customized using the Livelink Builder application development tools.

To customize the project home page:

1. From any project page, click the Workbin button.
   The project Workbin page displays.
2. **Click Add.**
The Add New Item page displays.

3. **Click Document.**
The Add New Item page scrolls to the document area.

4. **Enter the full path and name of the html file in the Input File field.**
   If you do not know the name or full path to the file, click the Browse button to locate it on your desktop.

5. **Enter the name HomePage.html in the Name field.**
   You must name your page HomePage.html, typed exactly as displayed here, including capitalization.

6. **If desired, enter a description of the home page in the Description field.**
   Entering a description is optional.

7. **Click the Add Document button.**
The home page is displayed on the project Workbin page.

8. **Click the Project Home button in the top frame.**
   Livelink Intranet replaces the standard project home page with the customized home page.

You can revert to the Livelink standard project home page at any time by simply deleting or renaming the customized home page and then clicking the *Project Home* button to reload the project home page. For more information about deleting or renaming a document, see Chapter Three, *Library.*
Bulletin Board

On the bulletin board, project members can post notes which are readily accessible to the entire project team. Posted notes can be set to expire on a certain date and can be emphasized on the bulletin board.

To open the bulletin board:

1. From any project page, click the Bulletin Board toolbar button. The Bulletin Board page displays.

2. View the notes. All notes display in their entirety on the bulletin board, along with the name of the user who posted the note and the date on which the note was posted. Scroll down if there are more notes than can fit on the screen at one time.
Creating a New Note

Any member of the project team can create a note and post it on the project bulletin board.

To create a note:

1. On the Bulletin Board page, click the Post a Note button. The Post a Note page displays.

2. Enter the message of your note in the large text box.

3. If desired, select the Emphasize check box to make your note appear in a bold font and have its icon emphasized in the bulletin board.

4. If desired, apply a time limit for the display of your note by selecting the Expires at the end of check box, and then selecting an expiration time from the popup.

5. Click the Submit button. The Bulletin Board page displays with your new note.
Deleting a Note

Notes can be deleted by the team member who created them or by the project leader. If no expiration date is set for a note, it will remain on the bulletin board until it is deleted. Even if a note has an expiration date, you can delete it before the expiration date is reached.

To delete a note:

1. **On the Bulletin Board page, click the icon preceding the note to delete.**
   The Post a Note page displays. If a Delete button is not displayed, you have opened a note posted by another user; you cannot delete this note.

2. **Click the Delete button.**
   A dialog box displays asking you to confirm your choice.

3. **Click the OK button.**
Discussions

Discussions allow team members to exchange ideas. This is done by creating discussion topics and replies to the topics. Discussion topics and replies are posted to the entire project; all members can read all topics and replies, regardless of who created them.

To view project discussions:

1. From any project page, click the Discussions button.

   The Discussion Topics & Replies page displays.

   ![September Trade Show](image)

   By default, only unread topic and replies are listed. To display all topics and replies, select the Show All radio button. Discussion topics are listed in reverse chronological order (most recent topics are listed first). The page displays, from left to right:

   - an icon indicating whether the item is a topic or a reply
   - the name of the topic
   - the number of replies you have not yet read
   - the total number of replies (in parentheses)
   - the name of the member who submitted it
   - submission date

   Replies are nested, so that a reply to a topic is indented one level. Unread topics and replies display in bold type.
2. To view the complete text of any topic or reply, click its name.
Another frame is added to the page to display the content of the topic or reply. The following picture shows the content of a topic. The page for a reply would contain the same information.

From this page, you can:
- Create a reply—Click the Reply to Topic button or link in the bottom frame.
- Send an E-Mail message to the author—Click the author’s name.
- Delete the topic or reply—Click the Delete button. If you delete a topic, all replies to it are automatically deleted as well.
- Examine another topic or reply—Click the topic or reply name in the top frame.
Creating a Discussion Topic

Any project team member can create a new discussion topic.

To create a discussion topic:


2. Enter a name for your topic in the Title field.

3. Enter the text of your topic in the Entry field. The text automatically wraps as you enter it.

4. If desired, attach up to two documents to your topic by entering their full names (including path) in the document fields or by clicking the Browse buttons to locate and select the documents.

5. Click the Submit Topic button. If you want to change the topic, click the Reset button to clear all fields and start over.

When you click the Submit Topic button, the Create a New Topic page closes and your topic appears on the Discussion Topics & Replies page.
RePLYING TO A DISCUSSION TOPIC

Any team member can reply to any discussion topic. Keep in mind, however, that all team members are able to read your reply, not just the member who created the topic.

To create a reply to a discussion topic:

1. Click the topic to which you want to reply.
   Another frame is added to the page to display the content of the topic.
2. In the bottom frame, click the Reply to Topic button or link.
   The Create a New Reply page displays.

2. Enter a name for your reply in the Title field.
3. Enter the text of your reply in the Entry field.
   The text automatically wraps as you enter it.
4. If desired, attach up to two documents to your reply by entering their full names (including path) in the document fields or by clicking the Browse buttons to locate and select the documents.
5. Click the Submit Reply button.
   If you want to change the reply, click the Reset button to clear all fields and start over.
Tasks

Tasks are project work assignments. A task has a name and a due date, and can be assigned to any team member. Unlike workflow tasks, project tasks do not have dependent work sequences and their status is not automatically monitored. For this reason, you may want to create a workflow instead of a task if your work has time-dependent work sequences or needs strict control.

All members of the project team can view all tasks, even those that they did not create and have not been assigned to them. However, only the assignee(s) can modify the task, entering comments and updating its status.

There are two ways to view tasks:

- To view all tasks assigned to you across all projects, open your In Box.
- To view all tasks associated with a project, open the Project Tasks page.
Your In Box

Your In Box lists all project tasks that have been assigned to you, from all projects. It also lists workflow tasks. For more information about your In Box and workflow, see Chapter Four, *Workflow*.

To examine all tasks assigned to you, regardless of the project:

1. Do either of the following:
   - Click the In Box button on the Livelink button bar.
   - From the Go To popup, select In Box.

The In Box page displays.

Both workflow tasks and project tasks are displayed on your In Box page. Project tasks are preceded by a task list icon.

The following information displays about each task:

- Task—the name of the task
- Status—the status of the task (Active, Issue, On Hold, Canceled, or Completed)
- Due Date—the date by which you should complete the task
- Process or Project—the name of the project (or workflow in the case of workflow tasks) of which the task is a part

The project name displays as a link. Click the link to open the project home page.
The Tasks Page

The project Tasks page lists all tasks. To display it, click the Tasks button on any project page.

The following information is listed for each task:

- **Title**—the name of the task
- **Responsibility**—the user or group to whom the task was assigned
- **Target Date**—the date by which the task should be completed (Tasks due within 24 hours have blue due dates; tasks that are late have red due dates.)
- **Priority**—the importance of the task (from 1 to 10)
- **Status**—the status of the task (Active, Issue, On Hold, Canceled, or Completed)
- **Created By**—the person who created the task
- **Description**—a description of the task
- **Comments**—any comments entered about the task
If you click a task assigned to you, the Edit Task page displays, allowing you to make changes. If you click a task assigned to someone else, the View Task page displays, allowing you to examine, but not modify the task.

**Editing a Task**

Editing a task allows you to modify the task parameters. The creator of a task or the project leader can edit all task parameters. The person or members of a group to whom a task was assigned can edit certain values.

To edit a task (creator or project leader):

1. On the Project Tasks page, click the title link of the task you want to edit. The Edit Task page displays.
2. Modify the following fields as appropriate:
   • Title—the name of the task
   • Target Date—the date by which work should be completed
   • Responsibility—the user or group to whom the task was assigned
   • Status—the status of the task (Active, Issue, On Hold, Canceled, or Completed)
   • Priority—the importance of the task (from 1 to 10)
   • Description—a textual description of how to accomplish the task
   • Comments—comments about the task

3. Once you have finished editing the task, click the Submit button to save your changes.
   You can, instead, click the Reset button to reset the task to its last saved values.

To edit a task (assignee only):

1. On the Project Tasks page, click the title link of the task you want to edit.
   The Edit Task page displays.

   ![Edit Task Page](image)
   This version of the Edit Task page contains three fields that you can edit.
2. Modify the following fields as appropriate:
   - Responsibility—the user or group to whom the task was assigned
   - Status—the status of the task (Active, Issue, On Hold, Canceled, or Completed)
   - Comments—comments about the task

3. Click the Submit button to save your changes.
   You can, instead, click the Reset button to reset the task to its last saved values.

**Viewing a Task**

Any member of the project team can view information about any task.

To view a task:

1. On the Project Tasks page, click the title of any task.
   The View Task page displays.

2. Examine the task.

3. To return to the Project Tasks page, click the Tasks button. Or, to return to the project home page, click the Project Home button.
Creating a New Task

Tasks define the work that needs to be done on a project. Tasks can be created for many reasons:

- to assign work to a team member or group of team members
- to remind members of a standing assignment (for example, weekly meetings or monthly status reports)
- to provide an outline of the major activities that constitute a project
- to post an unassigned task, seeking volunteers to complete it

Any member of the project team can create a task and assign it to any other team member.

To create a task:

1. On the Project Tasks page, click the Add a New Task button. The New Task page displays.
2. Enter a name for the task in the Title field.

3. Enter the date by which the task should be completed in the Target Date field. Entering a target date is optional.

4. Indicate the importance of the task by selecting a priority from the Priority popup. Each team can decide for itself whether 1 or 10 is the highest priority.

5. Assign the task by selecting a user or group from the Responsibility popup. Assigning the task is optional. Remember, the user or group you select can edit the task.

6. Select a status from the Status popup.

7. Enter a description of the task in the Description field. Entering a description is optional, however, you can use it to indicate how to complete the task.

8. Enter comments about the task in the Comments field. Entering comments is optional.

9. Click the Submit button to save the task to the Project Tasks page. You can, instead, click the Reset button to clear all fields and start over. The New Task page closes and the Project Tasks page displays, listing your newly created task.
Workbin

The project workbin is a storage area for folders, documents, compound documents, workflow maps, URLs, and queries used in the project. Items stored in the project workbin are inaccessible outside of the project. Therefore, you may want to place copies or aliases (references to items stored in a different location) in the workbin, instead of the original items.

The items in the project workbin are shared by all team members. Any member of the project team can work with the items stored in the workbin, depending on the permissions granted to the individual items. For more information about permissions, see the Permissions section in Chapter Three, Library.

You can perform any of the operations on items stored in the project workbin that you can normally perform on an item of that type. For more information about item operations, see Chapter Three, Library.

Adding Items to the Project Workbin

You can place items into the project workbin by creating new items or copying existing items into the workbin.

To create a new item:

1. From any project page, click the Workbin button. The project Workbin page displays.
2. Click Add.
The Add New Item page displays.

![Add New Item Page]

3. Click the type of item you wish to add.
Livelink Intranet scrolls the page down to the appropriate pane for the type of item selected.

4. Specify the information (item name, description, and so on) necessary to define the item.
For specifics on adding each type of item, see Chapter Three, Library.

5. Click the Add <item type> button to add the new item.

To copy a document into the project workbin:

1. Open a page containing the item you want to copy.
For example, you could open a Library page, another project page, or your My Stuff page.

2. Click Info.
The Information About page displays.

3. Scroll down to the FUNCTION pane.
4. Click Copy To.
   The Choose a Destination page displays.

5. Select the project name and click the Copy To button.

**Deleting Items from the Project Workbin**

Any team member can delete any item on which he or she has *Delete* permission from the project workbin.

To delete an item:

1. In the Workbin, click Info.
   The Information About page displays.

2. Click the Delete button.
   A dialog box opens asking you to confirm your choice.

3. Click the OK button.
Members

Every project has a membership team. The project membership team consists of a project leader and a list of the users and groups that can access the project. All team members can view a list of the project team members.

To display the Members page:

1. On any project page, click the Members button.
   The Project Members page displays.

   ![](image)

   The name of the project leader is listed, followed by the name of every member of the project team.
2. Select a member.
   Information about that member displays in the right frame of the page.

   From this page you can:
   - Send E-Mail to a member—Click the member's E-Mail address.
   - Remove a member from the project—Click the Remove From Project button (project leader only).
   - Change the project leader—Click the Set as Project Leader button (current project leader only).
Adding Members

The project leader can add members to the project at any time. Either individual users or groups can be added as project members.

To add members to the project:

1. On the Project Members page, click Add Members.
   The list of all users displays in the right frame.

2. Click the check box next to the users and groups you wish to add to the project team.
   You may have to scroll down to see all users and groups.

3. Click the Add to Project button.
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