

Clearspace Quick Tour

Use this tour to get acquainted with Clearspace. As you read through the tour, it will point out features and suggest things you can do to start putting Clearspace to work for you and your team.

For other introductions to Clearspace, be sure to see the Jive Software web site. There, you'll find [animations](#) that show Clearspace in action, as well as a [feature-by-feature description](#).

Get Started

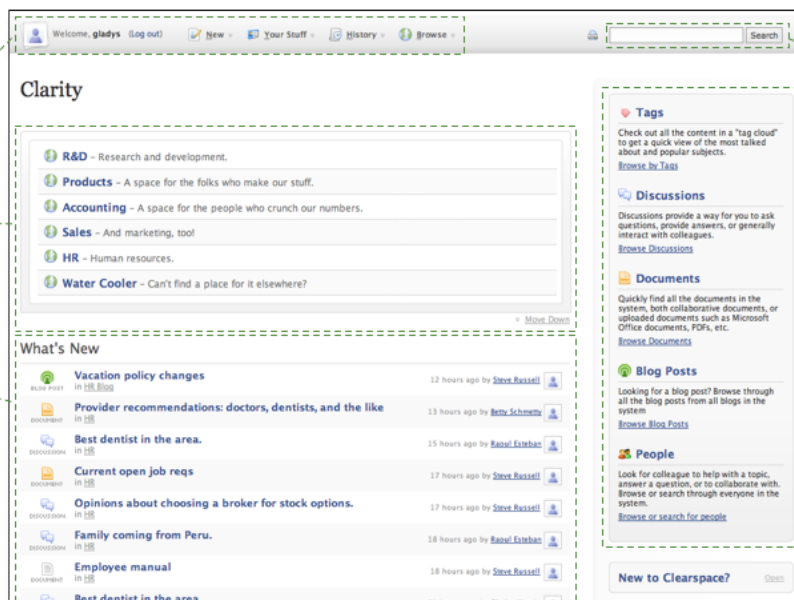
Get to know Clearspace. When you first log into Clearspace, the home page presents links to places where you might want to dive in.

By default the changed items are listed with the most recent first. Use the document type icons, titles, and change age ("3 hours ago by Barry") to decide if there's anything of interest for you here at the top level.

Select menu items to create new content, browse content you've created, content you've viewed recently, and content by type or space.

Click a space name to browse content in that space. These are also listed under the Browse menu.

View the most recent content changes and additions. Click an item to go to it.



Enter text and click Search to find content.

Click a content type name to browse content of that type.

The content type icons are your first clues as to the kinds of content you'll find and create in Clearspace: wiki documents, blogs, and discussions. You'll learn more about the types later in this tour. From the home page you can also get a feel for how you can find content. For example, through the sections on the home page you can browse by space, browse by content types or browse by tags (more about tags later, too). Also, that menu bar near the top of the page is present on all the other pages, too. It provides shortcut menus you'll find yourself using: **Browse** for content types and spaces, **History** for your recently viewed items, and **Your Stuff** for items you've created or are working on. In the [Find Content](#) section of the tour you'll learn more about how to find content in Clearspace.

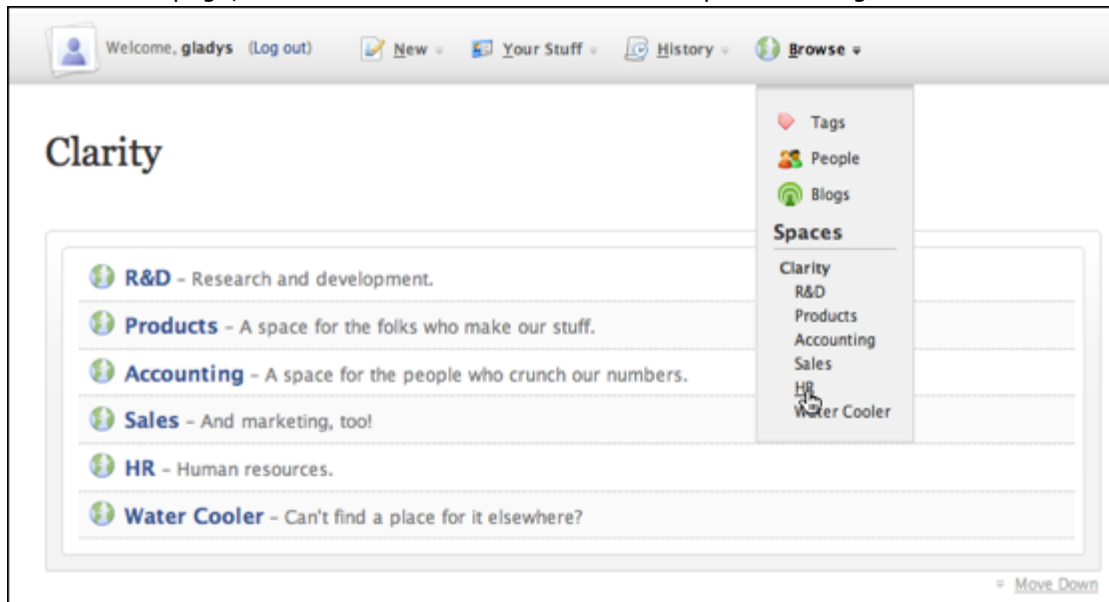
Find Content

As you saw on the Clearspace home page, you've got a number of paths into the content. You can browse

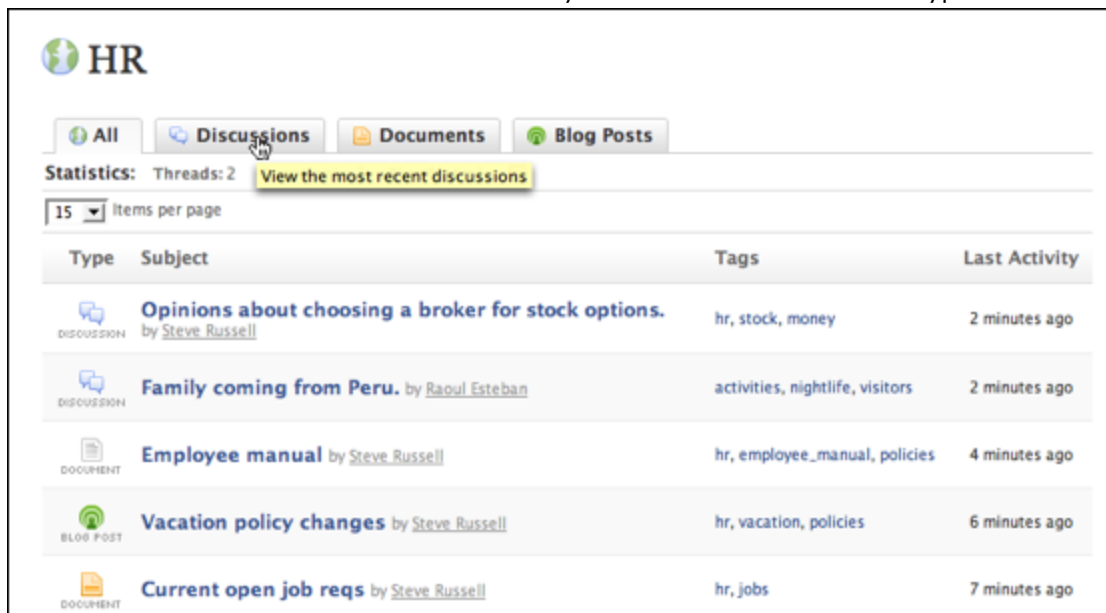
by space, by content type and tags, and you can search. (You can even browse for content by other users — just try clicking someone's name.) This section of the tour will introduce you to Clearspace's content-finding features.

Browse spaces. Most content in Clearspace is organized by spaces (some blogs aren't connected to a particular space). In spaces, you create, find, and organize content.

1. On the home page, click the **Browse** menu. Notice that spaces are organized in a hierarchical list.



2. Click the name of a space. On the space's home page, you'll see a list of the latest content organized by content type: **Discussions**, **Documents**, **Blog Posts**, and **All** of these. You can click the tabs to filter the content list to include only the content of the selected type.



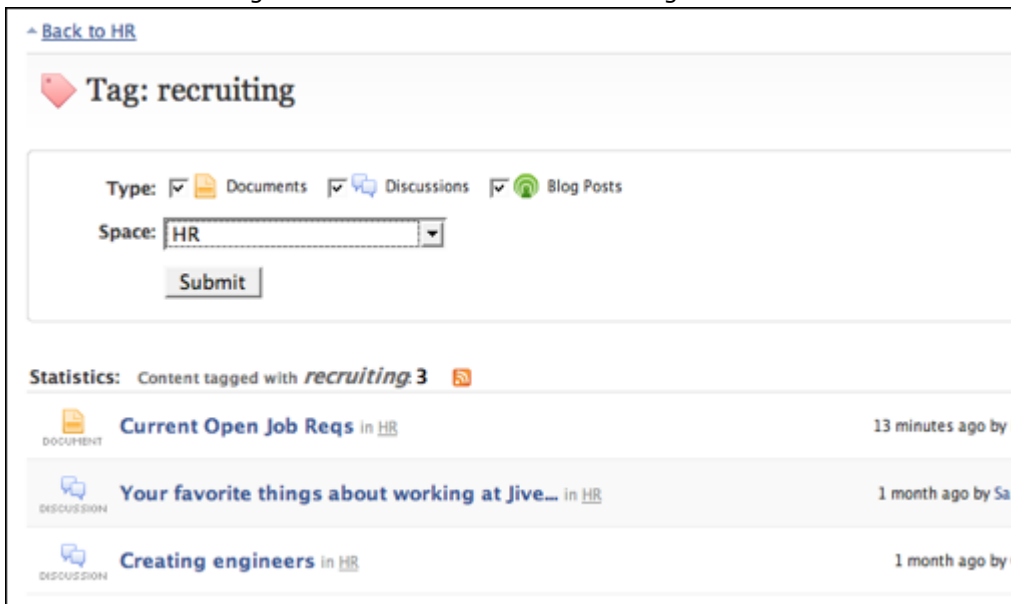
Browse by tags. When you browse by tags, you're using a community-made indexing system. You and other users apply tags like index keywords to new content to make the content more findable. You look for content you want by clicking tag names to see a list of related content. Wherever you go in

Clearspace, you'll see tags that group your content into categories.

1. Look for the tag cloud. If your team has had a chance to add and tag content, the home page for a space also shows something you'll probably find yourself using quite a lot: tag clouds. A tag cloud visually groups tags so that you can look by popularity (more popular tags are in a larger font) as well as look by alphabetical order.

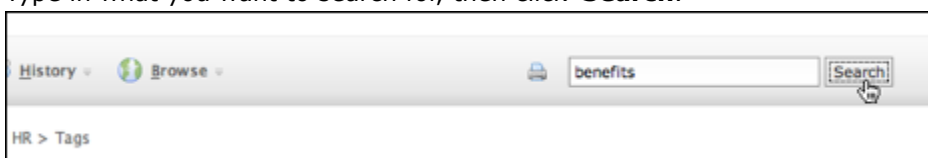


2. See the content associated with a tag. Hover over a tag to see the number of times it is assigned to content. Click the tag to see a list of the items it's assigned to.

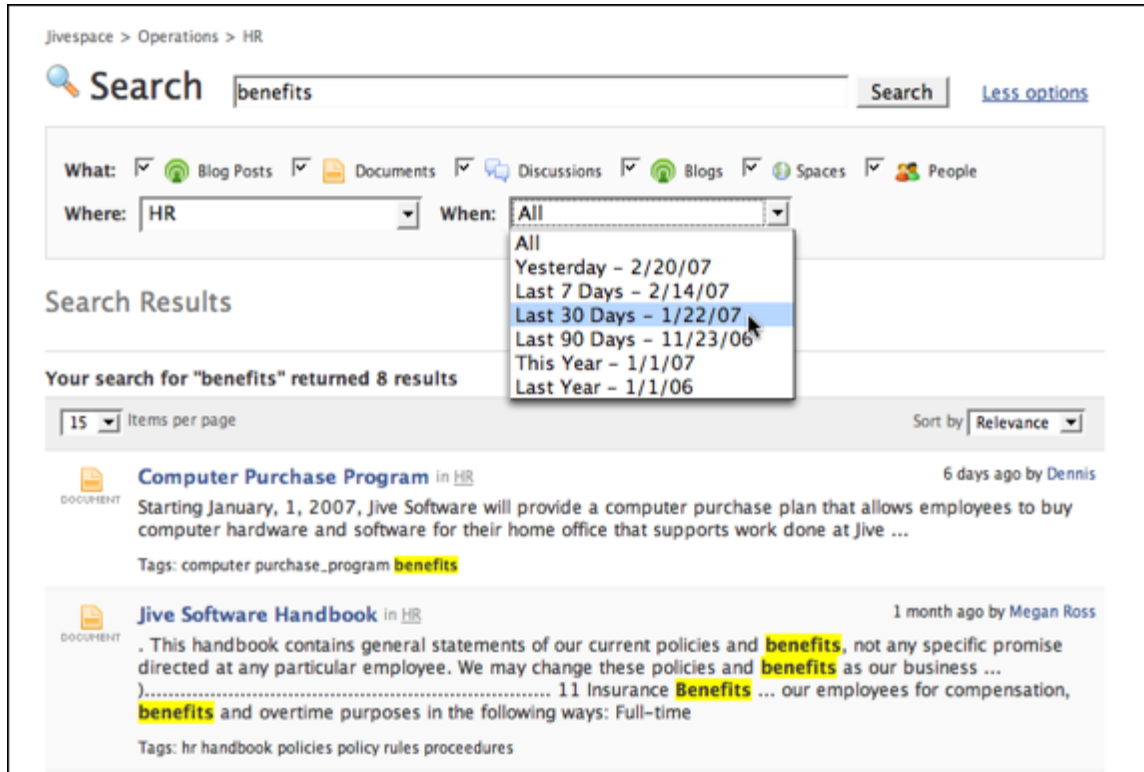


Search for content. Search for the content you want, filtering your search to refine the results.

1. Take a look at the **Search** box in the upper right corner.
2. Type in what you want to search for, then click **Search**.



3. See results on the **Search** page. You can filter search results by content type, by space, or by date.

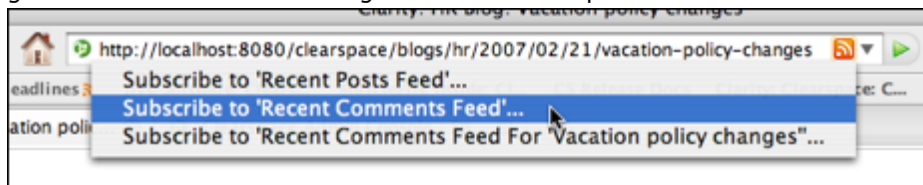


Through browsing and searching Clearspace you can look for the content you need. But what if you've found something you want to keep your eye on? By subscribing to RSS feeds or email notifications, you can get updated on changes to content you care about.

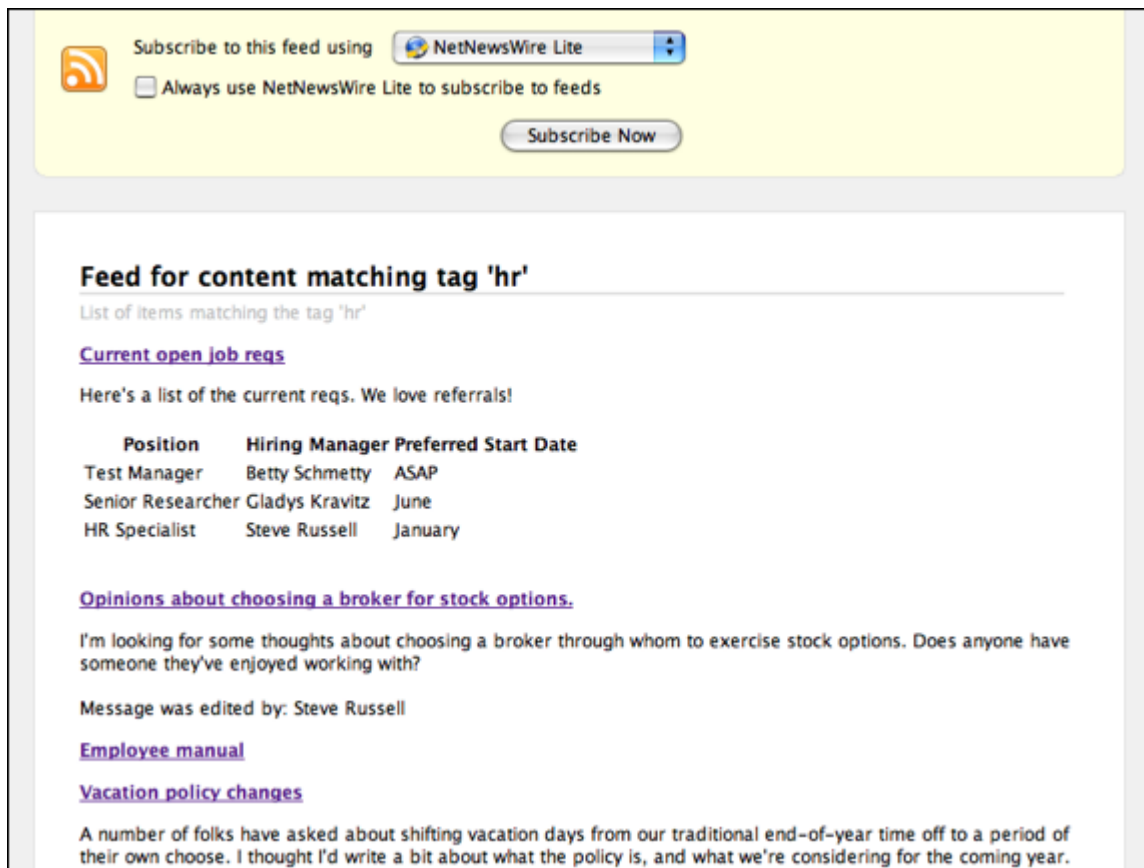
See the next part of the tour for more on RSS and email notifications.

Subscribe to RSS feeds. Real Simple Syndication (RSS) gives you a way to get a digest of updates to the content or areas you're interested in. When you "subscribe" to an RSS feed — say, for particular search results or a particular tag or the content of a particular space — you can check back any time for a list of updates using your RSS aggregator (which might simply be your web browser). That list will include only the content you subscribed for. You can get an RSS feed for nearly everything in Clearspace!

- Click the RSS icon at the right side of your browser's address bar to subscribe to an RSS feed for the content you're looking at. For example, if you're using a recent version of the Firefox browser, you'll get a list such as the following if there are multiple feeds available.

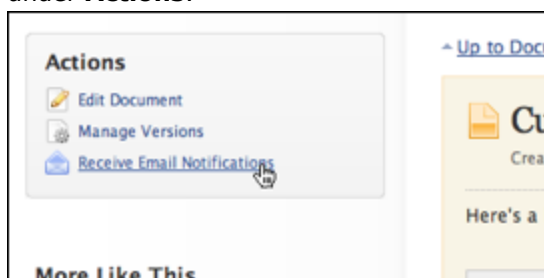


If you've chosen to be prompted to pick an RSS aggregator (also known as an RSS reader), you might see a page such as the following. You can choose the reader you want to use and see what the feed would currently bring you.



Get notified by email. In addition to RSS feeds, you can also stay on top of content using email notifications. When you sign up to receive email notifications, Clearspace will send you email whenever the content you're interested in changes.

- Navigate to a document you want to be notified about, then click **Receive Email Notifications** under **Actions**.



After you click, notice that Clearspace will change the link to **Stop Email Notifications**. You can always come back to here when you want to stop getting the email. You can also manage all of your notifications from your profile, as you'll see later in the tour.

In the [Create Content](#) section of the tour you'll learn more about the kinds of content you can create in Clearspace.

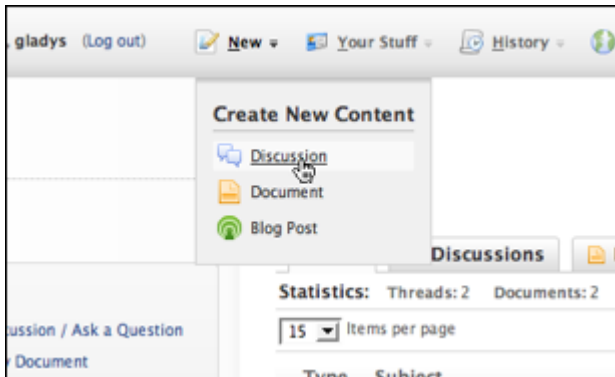
Create Content

You'll find the content you need with Clearspace. But if you use it long enough, there's a pretty good

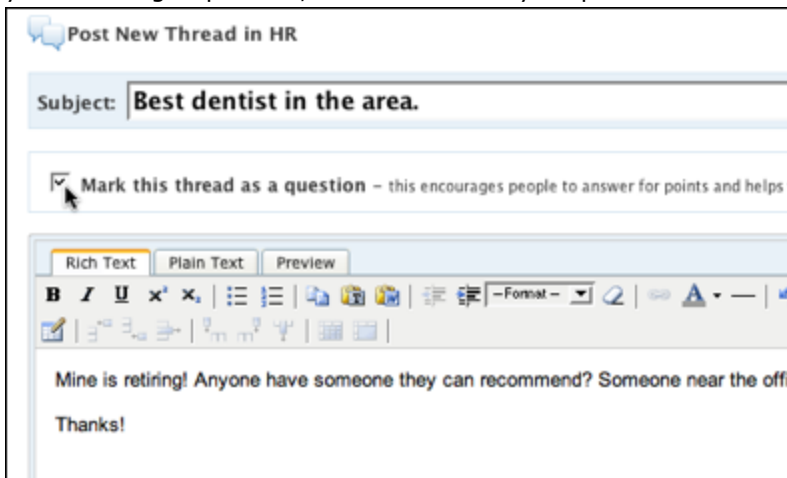
chance that you're going to want to make your own contributions. And that where things really get interesting. As you join others in the space — asking and answering questions, creating the documents you need day to day, maybe even posting your thoughts to a blog — you'll discover ideas you wouldn't otherwise have seen.

Ask a question, get some quick feedback. Discussions are great for those brief questions and comments. It might start with a simple question.

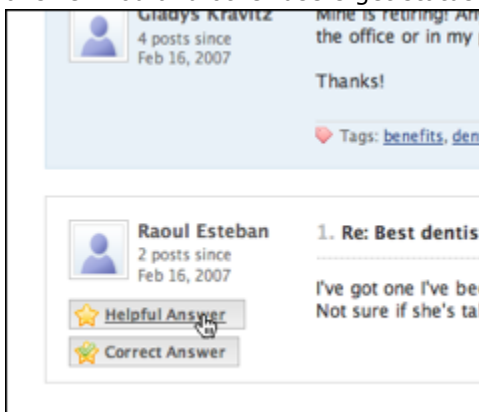
1. Click **New > Discussion** to start asking a question or make a quick post to find out what others think.



2. Mark your post if it's a question. You can simply post a comment for feedback from others. But if you're asking a question, be sure to mark your post so that others know you'd like an answer.



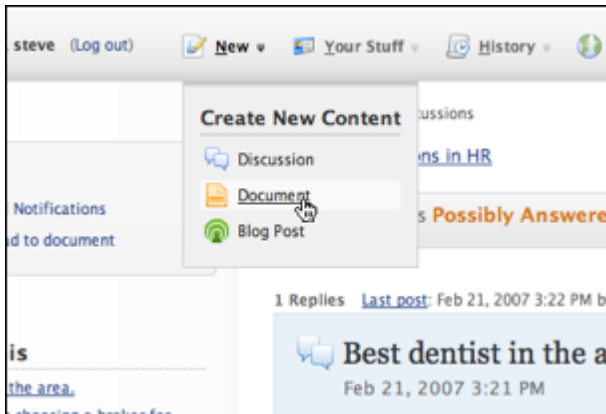
3. Tell others which responses got you where you wanted to go. When someone responds to your question with a post that's helpful or correct, mark it as such so that others know which is the best answer. You and other users get status points for helpful and correct answers.



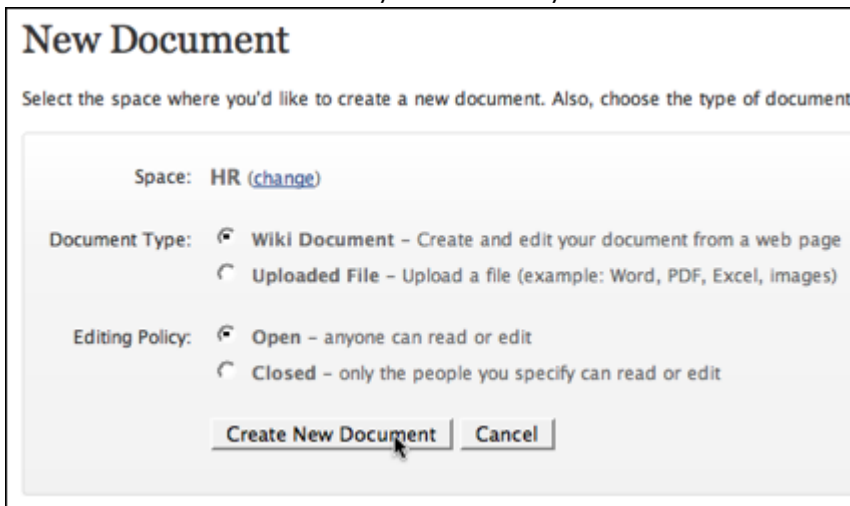
Create a document to preserve team thoughts. Wiki documents and uploaded files give you a way to get content into Clearspace. With wiki documents, you edit the content right in Clearspace. You and others can work on the same document, it's searchable, and you can specify that other users should review or approve the content. By uploading a file, on the other hand, you can add something that was created outside Clearspace. Uploading the file makes it available to other users; you can tag the uploaded file to make sure it gets found.

A wiki document is for capturing information that others on the team would be interested in (or might just need) — things like agendas, plans, meeting notes, equipment lists, and the like. They're team documents.

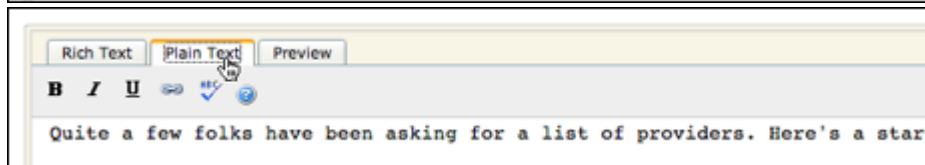
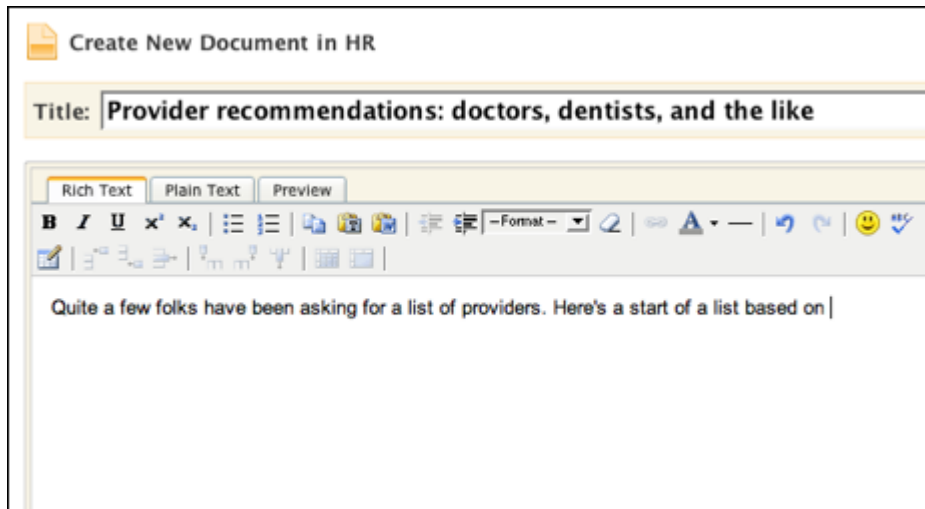
1. Click **New > Document** to start a new document.



2. Create a wiki document that's open. An open document can be edited by any other user. With a closed document, you'd add users as collaborators in order for them to be able to edit the document. This is a document you want everyone to be able to edit.

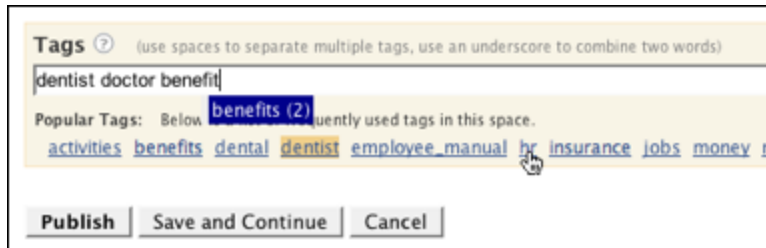


3. Give the document a title and type your content in the editing window. Notice that you've got two ways to edit the document, along with a preview pane to see how your work is coming along.



4. Add tags to describe the document to other users. This is one of best things you can do for your team. As you and other users add tags, you'll develop your own way to describe the content everyone uses.

It's also a good idea to use existing tags whenever possible. You can type the tag names, letting Clearspace finish the name where the tag already exists; you can also click the tag in the **Popular Tags** list to add the tag to the document.



5. You can click **Save and Continue** to save your work and keep writing. Click **Publish** when you're ready for others to see your document.

6. After you've published the document, notice that the **Actions** box lists tasks related to the document.

In particular, notice the **Manage Versions** and **Manage Collaboration** links. Clicking **Manage Versions** will display a page that lists versions of the document. You can select document in the list to compare changes to the document over time. The comparison shows additions and deletions in from the later version's perspective.

Version Comparison

Comparing: [Revision 5](#) » [Revision 6](#)
 Color Key: Addition Deletion
 Single Page Side By Side

Revision 5 Restore this version	Revision 6
By Steve Russell at 44 minutes ago Revision 5	By Betty Schmetty at Less than a minute ago Revision 6
Quite a few folks have been asking for a list of providers. Here's a start of a list based on information I received from several of you.	Quite a few folks have been asking for a list of providers. Here's a start of a list based on information I received from several of you.
Doctors	Doctors
Dr. Anita O'Day, 503.555.4359 Dr. Nathaniel Adderly, 503.555.8765 Dr. Lew Alcindor, 503.555.4305	Dr. Anita O'Day, 503.555.4359 Dr. Nathaniel Adderly, 503.555.8765 Dr. Lew Alcindor, 503.555.4305 Dr. Samuel Beckett, 503.555.3931
Dentists	Dentists
Dr. Clifford Brown, 503.555.2345 Dr. John Birks Gillespie, 503.555.4824 Dr. James P. Johnson, 503.555.0239	Dr. Clifford Brown, 503.555.2345 Dr. John Birks Gillespie, 503.555.4824 Dr. James P. Johnson, 503.555.0239 Dr. John Donner, 503.555.2648

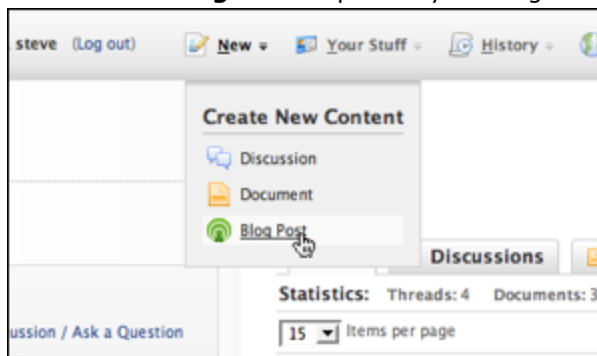
You'll read more about managing collaboration in the [Collaborate on Content](#) section of this tour.

Tip: You can make a document from a discussion! View the discussion in Clearspace, then click the **Convert thread to document** link under **Actions**.

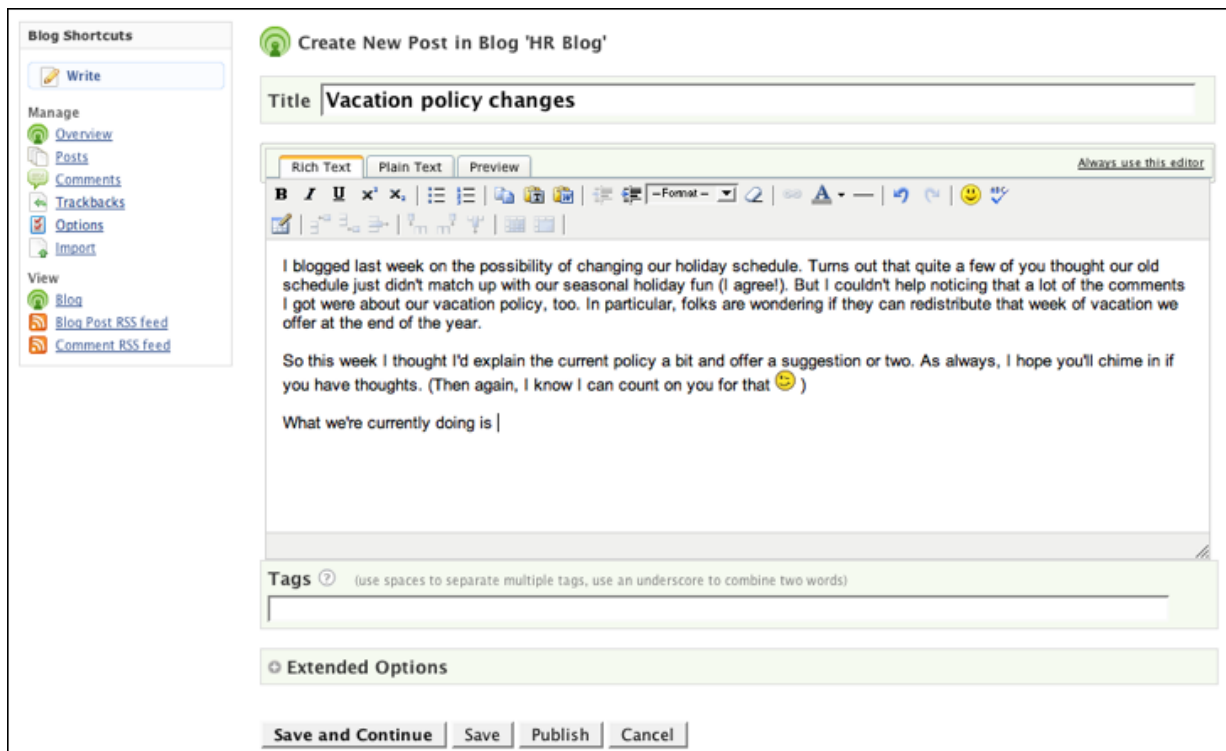
Post your views to your blog. Whereas wiki documents are often authored by the team, blogs are for more individual kinds of content. A blog might be the voice of a department (such as human resources), or of an individual (such as you). A blog is a like a column in a newspaper — it's there when you look for it, now and then offering something new to read. Unlike a newspaper column, though, others can comment on a blog.

If you've got a blog, you might post your views on something you just read that others in the organization might be interested.

1. Click **New > Blog Post** to post to your blog.



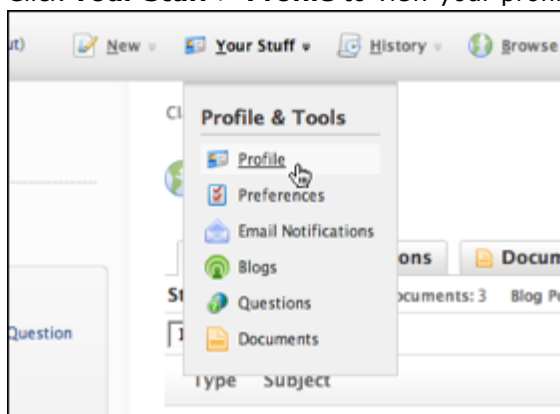
2. Notice that the blog editing page is very much like the discussion and document editing pages: the same rich text and plain text editors are available, along with a preview tab. Notice, too, that you get a number of shortcuts to tools that are specific to blogs. You can view the posts you've made, comments to your posts, trackbacks (links to other sites that have linked to your blog), and blog options such as moderation and RSS feed settings.
3. In the editing window, type a title and the content of your blog post.



4. You can **Save** a draft of the post before you publish. As with discussions and documents, be sure to add tags before you click **Publish**; tags will help your post be more discoverable.

Create a profile. Your profile can be bare bones or more thorough. If you fill in the optional fields, you can give others a sense of who you are and what you know. It can be very useful in a community to know who to go to when you've got a question or suggestion in mind.

1. Click **Your Stuff > Profile** to view your profile.



2. On your profile page, notice that the **Actions** box lists a few things you can do. On the preferences page you can adjust your notification and subscription settings.
3. Click **Edit Profile**.
4. Fill in as much profile information as makes sense. Keep in mind that your profile will be found when users search, so if you have professional roles or interests that would be useful for others to know, be sure to include them.

Edit User Profile

Use the form below to edit your profile and settings.

Username:	steve
Name:	Steve Russell
	Show Hide
Email:	steve@example.com
	Show Hide
Location:	Portland
Title:	HR Manager
Phone Number:	503.555.2998
Biography:	Born and raised in Portland, I live with my wife and two kids in Sellwood.
Expertise:	Human resources, benefits, stock, cross-country skiing, play the lute.

Save Cancel

Collaborate on Content

Nearly everything you do in Clearspace is collaborative. Content you add is almost always visible and searchable (unless you've explicitly indicated that it shouldn't be, as with closed documents). Other users read your work, you read theirs. You get ideas from someone else's blog, they comment with suggestions on your document.

But Clearspace provides some capabilities that are especially collaboration-oriented. For example, you can create a document that other users can work on with you. You can also create a list of people who need to be involved in a document's progress, whether by authoring, reviewing, even approving.

Add collaborators. When you add collaborators to a document, you're giving them special roles in what's called the document's "workflow." In other words, the document's progress starts in one place — a draft — and moves or flows through a process of work — possibly authoring, reviewing, and approval — until it's ready for publishing.

1. Click **New > Document** to create a new document.
2. Be sure to click the **Closed** option before clicking **Create New Document**.

New Document

Select the space where you'd like to create a new document. Also, choose the type of document and

Space: **HR** ([change](#))


Document Type: Wiki Document - Create and edit your document from a web page
 Uploaded File - Upload a file (example: Word, PDF, Excel, images)

Editing Policy: Open - anyone can read or edit
 Closed - only the people you specify can read or edit

3. Notice that the buttons at the bottom of the document editing page are slightly different than for an open document. With a closed document, you can save without publishing. This makes it possible for the document's collaborators to review and make changes before the content is broadly visible.
4. Add a title and your initial content, then click **Save Draft**.
5. After the document is saved, click **Manage Collaboration** in the **Actions** box.
6. On the **Manage Collaboration** page, click **Add Collaborator** and type the name of a collaborating user in the box provided. Notice that Clearspace will try to complete the user's name.

Manage Collaboration: Performance review ratings

Collaborators ?

User	Reviewer	Author	Approver	Remove
steve - Creator				<input type="checkbox"/>
<input type="text" value="gla"/> - Pick User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 gladys gladys@example.com				

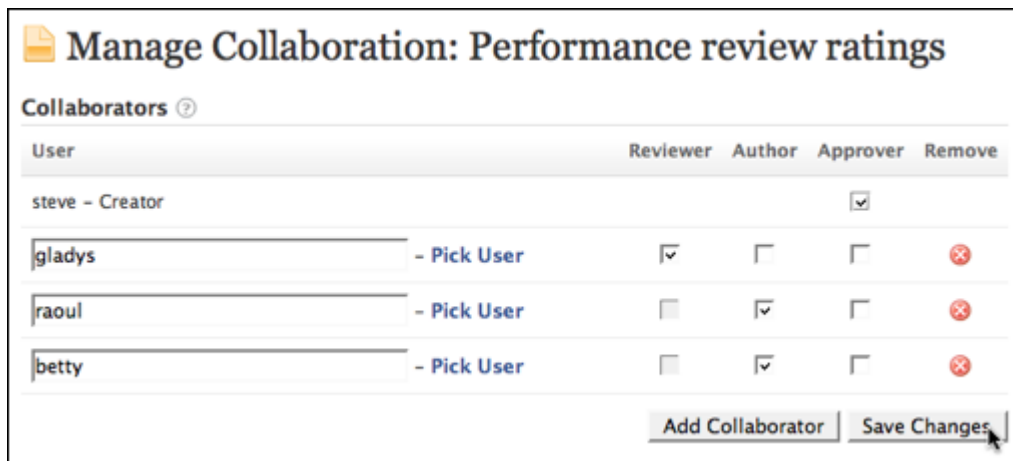
Editing Policy

Open (Any user can edit the document)
 Closed (Only specified users can edit the document)

Comments

Open (Comments are allowed)
 Closed (Existing comments will be displayed, new comments are not allowed)
 None (Comments will not be displayed, new comments are not allowed)

#For each of the collaborators, select check boxes to indicate their role. Reviewer can read and add comments, but not edit the content. Authors can read and edit, but needn't approve. Approvers can read and edit, and will also be prompted to approve the document before it can be published.



Clearspace will provide cues to the other collaborators that they have roles on this document. In particular, authors will have the document listed as a draft under their **Your Stuff** menu (they'll also be able to submit the document for approval); approvers will be prompted by the Clearspace user interface that they have a document to approve.

This is the end of the Clearspace tour, but it has really only scratched the surface. The best way to get to know Clearspace is to put it to work by adding content and responding to the content other users have added. Give it a try!