

Clearspace Quick Tour

Welcome to the Clearspace Tour! Use this tour to get a step-by-step view of some of the things you can do 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. Here are the steps:

[Get Started](#)

[Find Content](#)

[Create Content](#)

[Collaborate on Content](#)

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](#). You might also be interested in looking through the Clearspace Help, which answers common questions about how to get things done in Clearspace.

Get Started

Get to know Clearspace. When you first log into Clearspace, the home page offers links to places where you can 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") to decide if there's anything of interest for you here at the top level.

Use this menu anywhere in Clearspace.

Create new discussions, documents, blog posts, and more.

Get your stuff: content you've contributed, your profile, content you're keeping your eye on.

See what you've looked at lately.

See everything inside.

Welcome, Gladys Kravitz (log out) New Your Stuff History Browse Search

Enter text and click Search to find content.

Clarity

Spaces

- R&D
- Products
 - Development
 - QA
- Accounting
- Sales
- HR
 - Benefits
 - Wellness
- Water Cooler

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

What's New

All Content Your View Go to: Discussions Documents Blog Posts

- Re: Knife cuts through any kind of can? Bottles, too? 1 week ago in R&D by Betty Schmetz
- Protac: No dessert topping. 1 week ago in R&D Blog by Gladys Kravitz
- Plans for the Next Big Thing 1 week ago in HR by Raoul Esteban
- Re: Anyone signing up for Hood-to-Coast 1 month ago in Wellness by Raoul Esteban
- More juices, less soda in the fridge 1 month ago in Wellness by Gladys Kravitz
- Cyms near the office. 1 month ago in Wellness by Raoul Esteban
- Morning push-ups! 1 month ago in Wellness by Raoul Esteban
- Cast off that wrist-brace! 1 month ago in Wellness Blog by Betty Schmetz
- Performance review ratings 5 months ago in HR by Gladys Kravitz
- Provider recommendations: doctors, dentists, and the like 5 months ago in HR by Betty Schmetz
- Re: Best dentist in the area. 5 months ago in HR by Raoul Esteban
- Current open job reqs 5 months ago in HR by Steve Russell
- Employee manual 5 months ago in HR by Steve Russell
- Opinions about choosing a broker for stock options. 5 months ago in HR by Steve Russell
- Family coming from Peru. 5 months ago in Water Cooler by Raoul Esteban
- Dental benefits summary 6 months ago in Benefits by Betty Schmetz
- Performance review policies. 6 months ago in HR by Steve Russell
- Proposed 2008 price list. 6 months ago in Products by Gladys Kravitz
- Vacation policy changes 6 months ago in HR Blog by Gladys Kravitz
- Smoking the competition 6 months ago in Gladys' Blog by Gladys Kravitz

Click Your View to choose which content you want displayed here.

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

Top Contributors View all Contributors

- Gladys Kravitz
- Betty Schmetz
- Steve Russell
- Raoul Esteban

View a list of the people who are most active. Click their name to view their content and profile.

Popular Tags Browse all tags

hr fitness benefits dentist recommendations activities employee_manual hr_policies jobs new_products policies stock time_off visitors workplace_health

View the tags that are getting applied the most often. Click a tag to view the content it's applied to.

Latest Poll More polls

Buy more fruit for the snack counter?

- Yes! Carmen Miranda's hat!
- Maybe... a little more.
- No way. Keep the artificial sugar.

Vote! Votes: 3 - Full Results

Cast your vote if you see a poll.

New to Clearspace? Learn more

Click Learn More to reach this tour.

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, notice that menu bar near the top of the page. It's available on all the other pages, too. Use it to:

- Create **new** content.
- **Browse** for existing content, spaces, and people.
- Get **history** for your recently viewed items.
- Check in on **your stuff** for items you've created or are working on.

After you've gotten to know what's inside pretty well, use the **Your View** link at the top of the What's New box to choose which content you want to appear here.

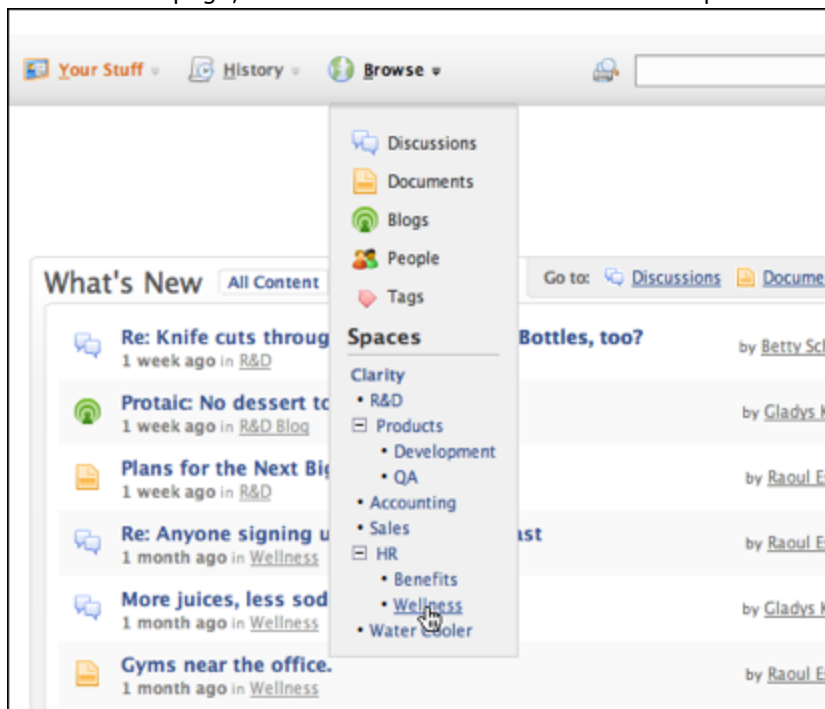
In the **Find Content** section of the tour you'll learn how to stay on top by using spaces, searches, tags, notifications, and something called "feeds."

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 people — 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. If the space's home page overview has been customized, you're likely to see an arrangement of content that's tailor made for you as a visitor to the space. You'll also find lists of the latest content of each other content type: **discussions**, **documents** and **blogs** (if the space features blogs). Use the All Content, Discussions, Documents, and Blog Posts tabs to get more of each kind of content.



Overview (customize)
All Content (5)
Discussions (3)
Documents (1)
Blog Posts (1)

Welcome!


You've found our one-stop resource for all things health and wellness. Have a question about workouts? Got a new sport you're excited about? Post about them here!

Here's some of what's happening here this week:

- Steve wants to get a Hood-to-Coast relay team together. Check out [Anyone signing up for Hood-to-Coast](#).
- Raoul has updated [Gyms near the office](#), with a new spot just a few blocks away.
- There's a better way to avoid carpal tunnel. Betty talks about it in [Cast off that wrist-brace!](#).

Plus, we found a cool in-your-office workout on YouTube. Check out the video below.

Quick In-Office Workout



Latest Poll

Buy more fruit for the snack counter?

☞ Yes! Carmen Miranda's hat!

☞ Maybe... a little more.

☞ No way. Keep the artificial sugar.

Votes: 3 - [Full Results](#)

Recent Content

- [Anyone signing up for Hood-to-Coast](#)
- [More juices, less soda in the fridge](#)
- [Gyms near the office](#)
- [Morning push-ups!](#)
- [Cast off that wrist-brace!](#)

Fitness at MSNBC

Oct 30, 2007
[Stretching may offer extended benefits](#)

Oct 26, 2007
[U.S. launches school commute exercise plan](#)

Oct 24, 2007
[Vibration platform may help tone abs](#)

[The Fit List: A 6-minute shape-up](#)

Oct 22, 2007
[New York program gets kids up and running](#)

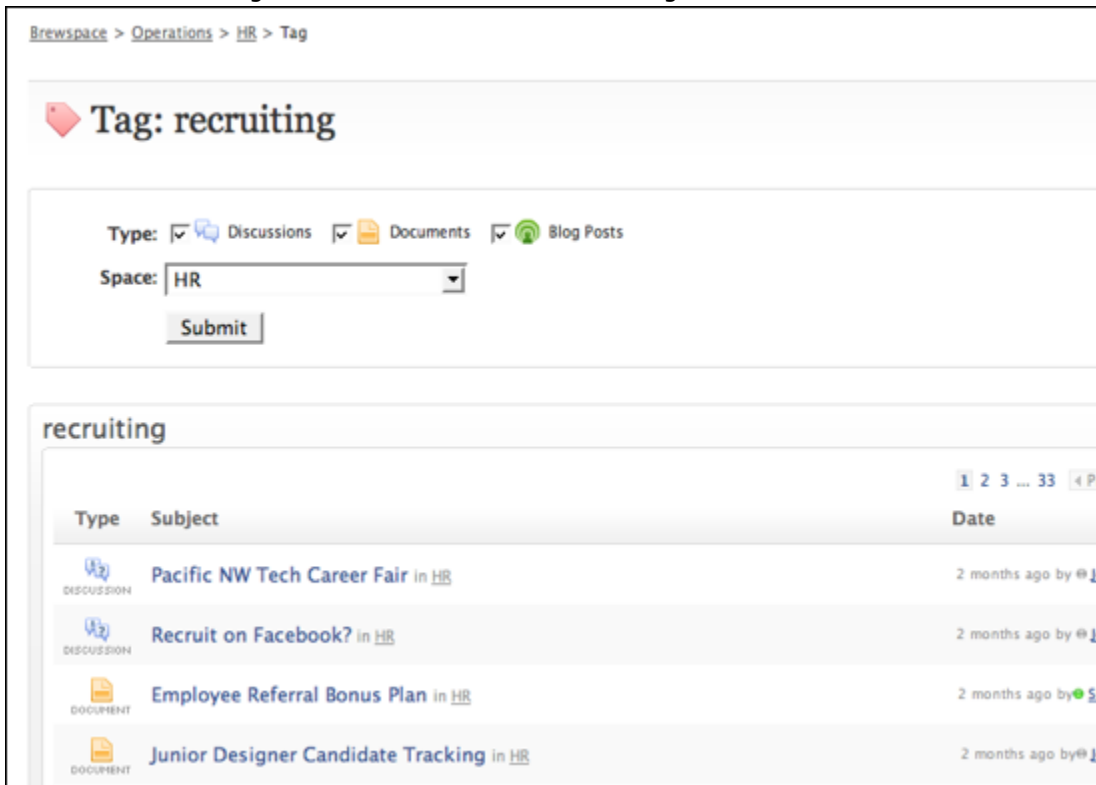
If you haven't already, take a moment to browse your spaces.

Browse by tags. When you browse by tags, you're using a community-made indexing system. You and other people 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: a tag cloud. 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.

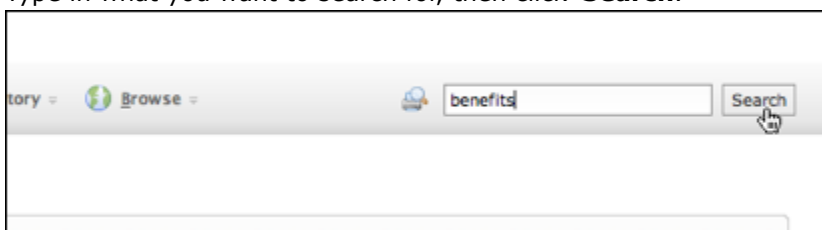


2. See the content associated with a tag. Hover over a tag to see the number of times it is assigned to content. Click the tag to see a list of the items it's assigned to.

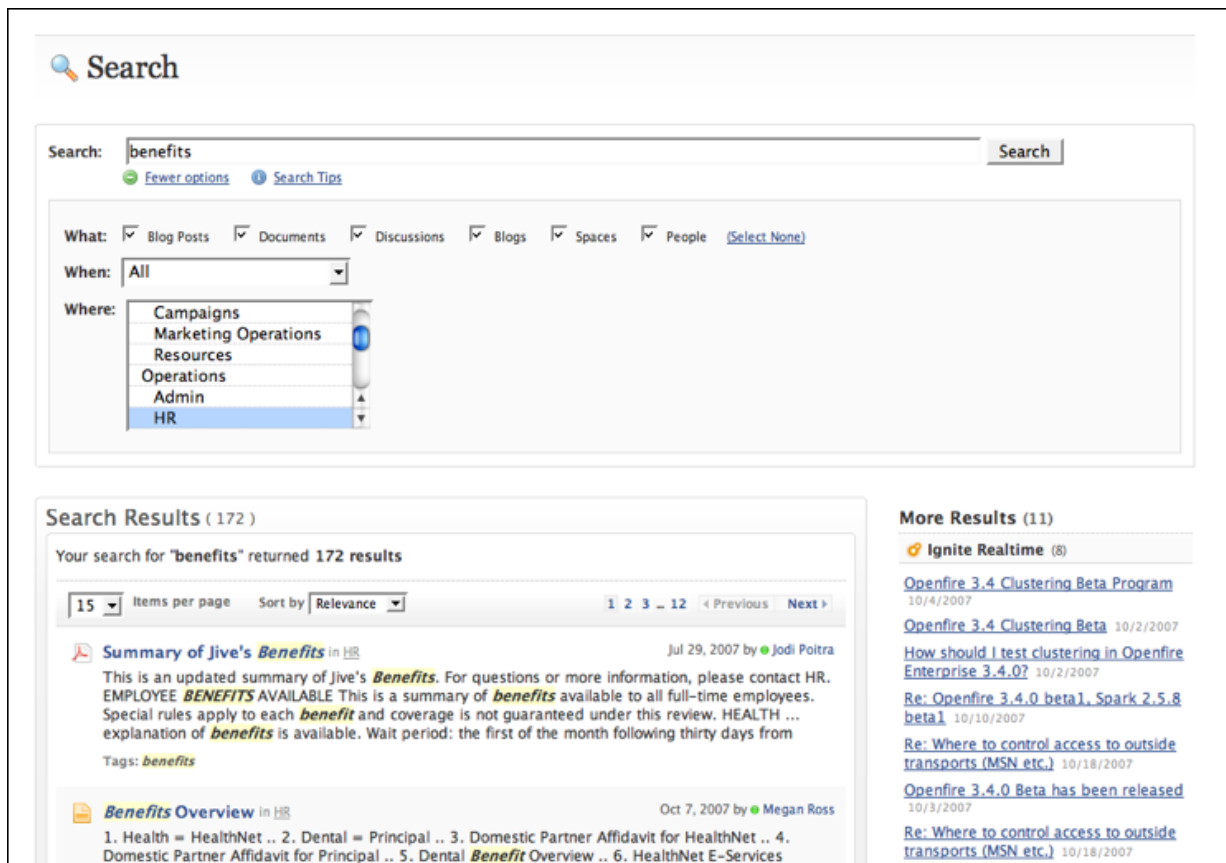


Search for content. Search for the content you want, filtering your search to refine the results.

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. You might also see search results from outside of Clearspace listed under **More Results**. You'll get these if your system administrator has connected OpenSearch sites to Clearspace.

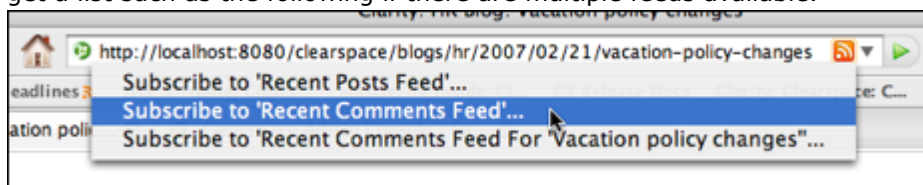


Through browsing and searching Clearspace you can look for the content you need. But what if you've found something you want to keep your eye on? By subscribing to RSS feeds or email notifications, you can get updated on changes to content you care about.

See the next part of the tour for an introduction to RSS and email notifications.

Subscribe to RSS feeds. Ever want a way to see what's new or changed on your favorite web sites without having to visit the sites? You can use Real Simple Syndication (RSS) to get a digest of updates to the stuff you're interested in. When you "subscribe" to an RSS feed — say, for particular search results or a tag or the content of a space — your RSS reader (which might simply be your web browser) does the checking for you. With RSS, you can subscribe to nearly anything 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 reader (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.

Subscribe to this feed using NetNewsWire Lite

Always use NetNewsWire Lite to subscribe to feeds

Subscribe Now

Feed for content matching tag 'hr'

List of items matching the tag 'hr'

[Current open job reqs](#)

Here's a list of the current reqs. We love referrals!

Position	Hiring Manager	Preferred Start Date
Test Manager	Betty Schmetty	ASAP
Senior Researcher	Gladys Kravitz	June
HR Specialist	Steve Russell	January

[Employee manual](#)

I've attached the employee manual as a PDF document. Please feel free to ask me questions. You can reply to me directly or add your comment here on the document.

[Opinions about choosing a broker for stock options.](#)

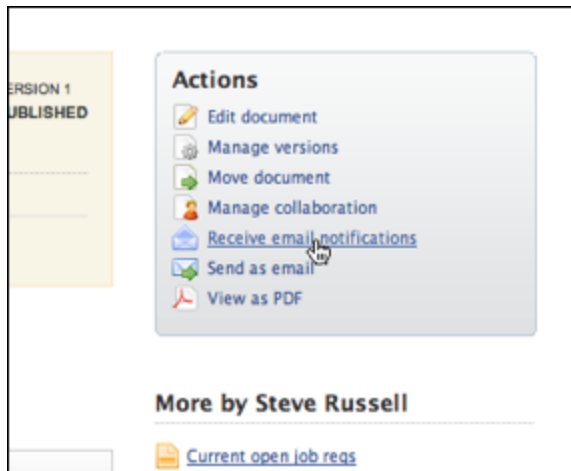
I'm looking for some thoughts about choosing a broker through whome to exercise stock options. Does anyone have someone they've enjoyed working with?

If RSS sounds appealing, take a moment to get it set up. Select one of the Clearspace RSS feeds and subscribe. If you select a reader to use for all feeds, subscribing is as easy as clicking the RSS icon where you see it in Clearspace.

Note: When subscribing to Clearspace feeds, you might need to associate your Clearspace user name and password with the subscription.

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 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.

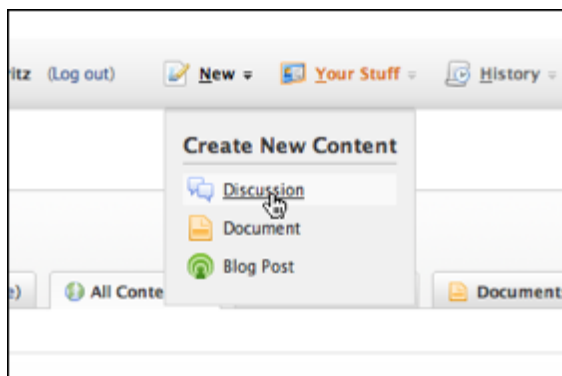
In the [Create Content](#) section of the tour you'll learn more about the kinds of content you can create in Clearspace.

Create Content

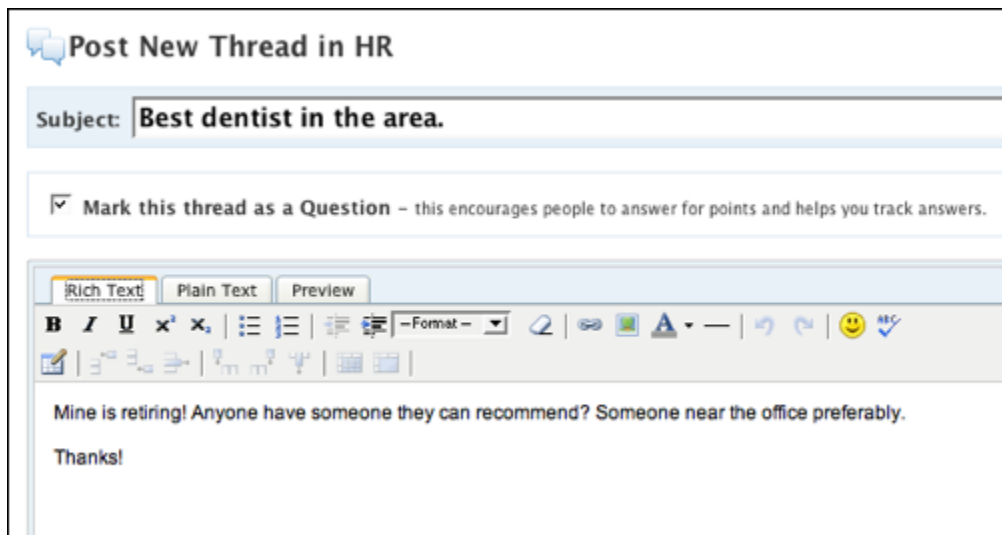
You'll find the content you need with Clearspace. But if you use it long enough, there's a pretty good chance that you're going to want to make your own contributions. And that where things really get interesting. As you join others in the space — getting answers to your questions, finding documents you need day to day, reading others' thoughts in a blog — you'll discover ideas you wouldn't otherwise have seen. And you'll want to get them out of your head and into Clearspace.

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

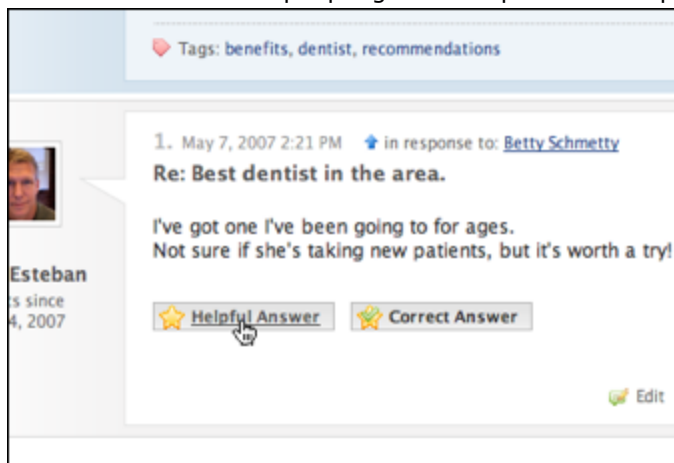
1. Click **New > Discussion** to start asking a question or make a quick post to find out what others think.



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.



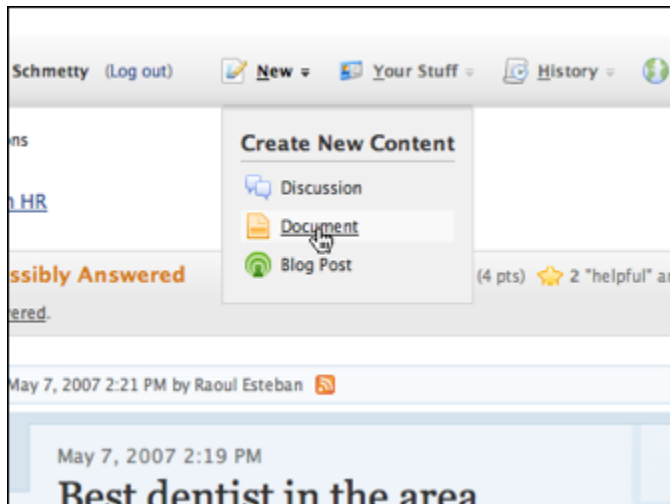
3. Tell others which responses got you where you wanted to go. When someone responds to your question with a post that's helpful or correct, mark it as such so that others know which is the best answer. You and other people get status points for helpful and correct answers.



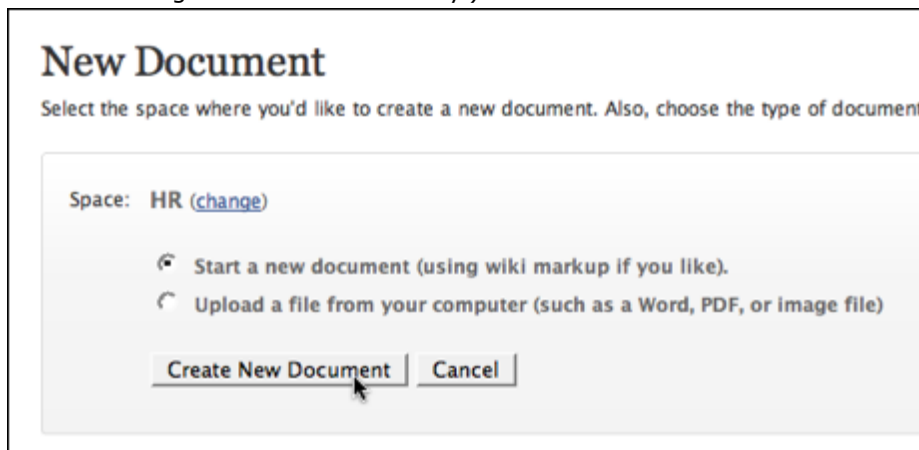
Create a document to preserve team thoughts. Wiki documents and uploaded files give you a way to get content into Clearspace. With wiki documents, you edit the content right in Clearspace. You and others can work on the same document and it's searchable. As you'll see later, you can also specify that other people 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 people; 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.

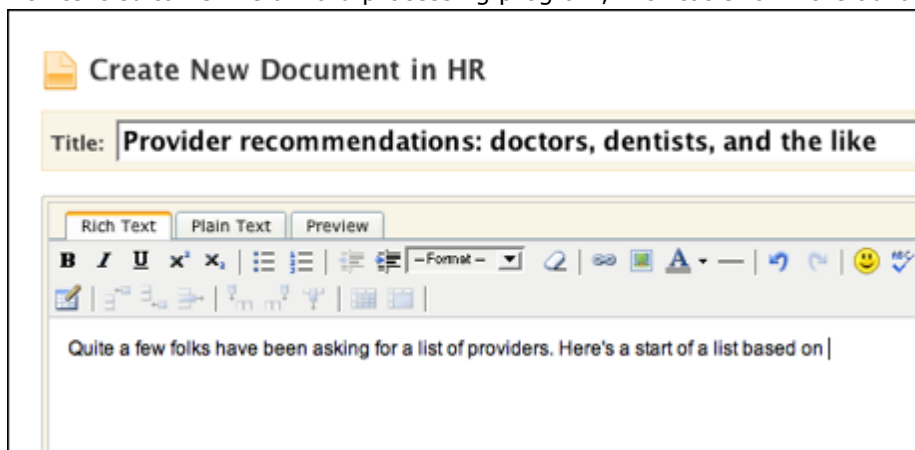
1. Click **New > Document** to start a new document.



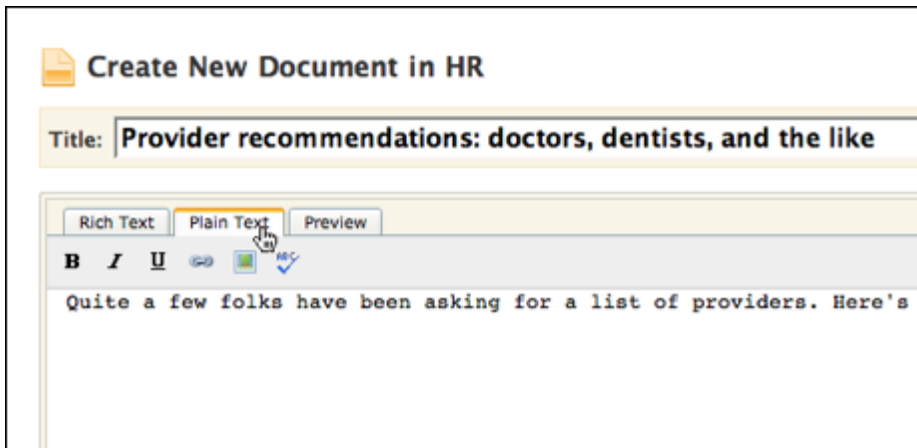
2. Start a new wiki document. Anyone will be able to edit this document. (Later in this tour, you'll learn how to limiting a document's visibility.)



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. The rich text editor is like a word processing program, with tools for more advanced formatting.

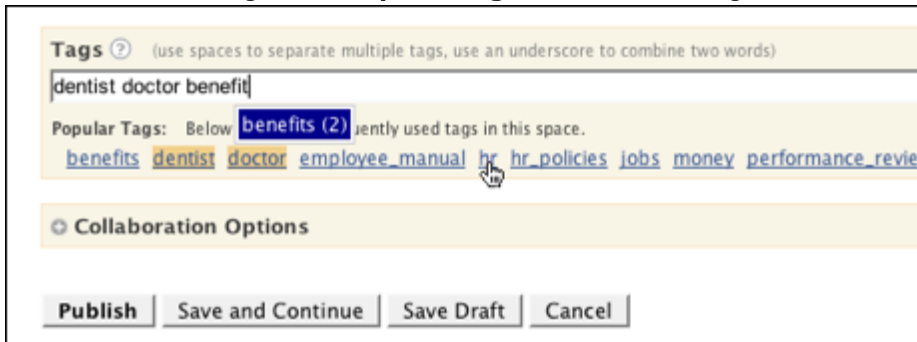


The plain text editor (shown below) offers simple formatting features, but is designed primarily for editing in the wiki markup style. Click the help link at the right side to see a list of wiki markup conventions you can use.

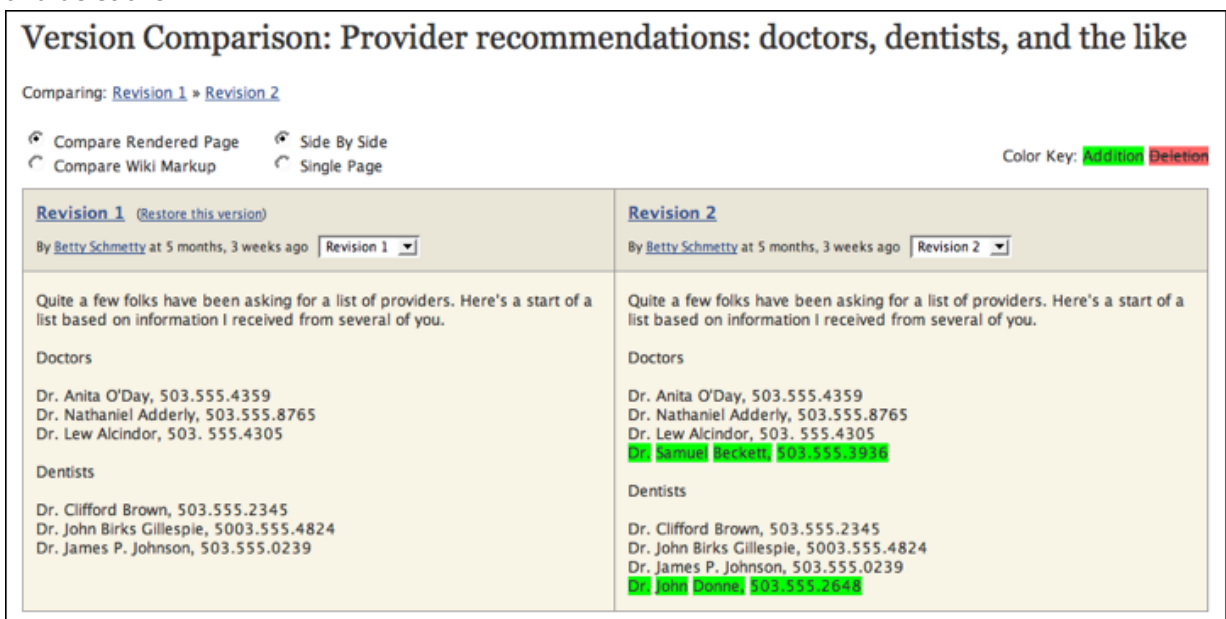


4. Add tags to describe the document to other people. This is one of best things you can do for your team. As you and other people add tags, you'll develop your own expressions to describe the content you all use. For those expressions to be most useful, try to use existing tags whenever possible.

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 or click **Save Draft** to finish later. 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. Click **Manage versions** to display a page that lists versions of the document. You can select document versions in the list to compare changes to the document over time. The comparison shows additions and deletions.

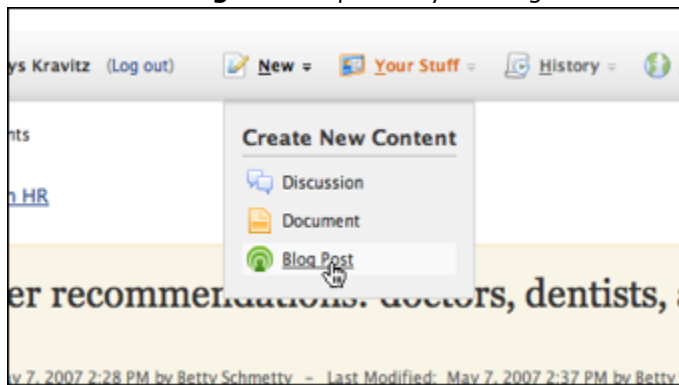


Tip: You can make a document from a discussion! View the discussion in Clearspace, then click the **Convert thread to document** link under **Actions**.

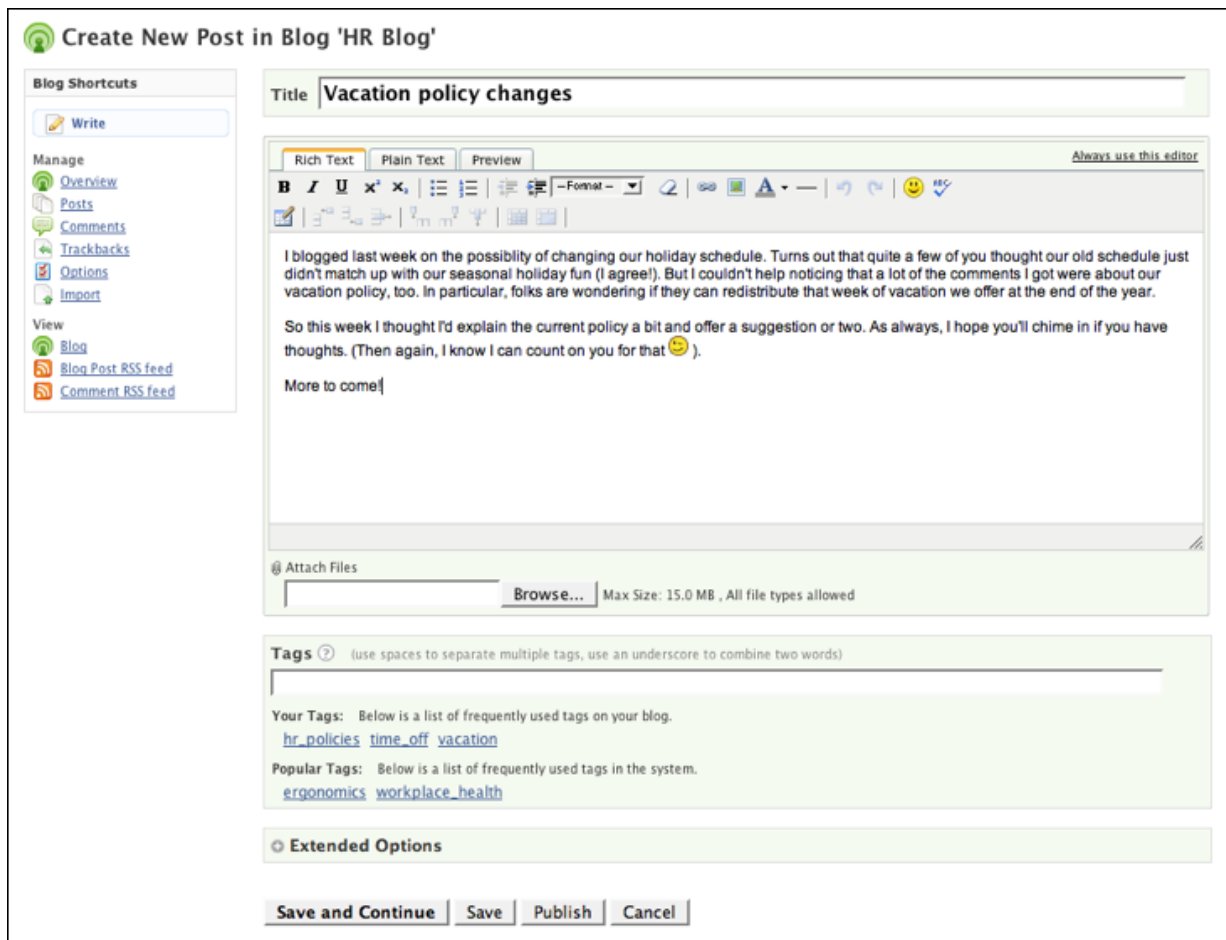
Post your views to your blog. While wiki documents are often authored by the team, blogs are for more individual kinds of content. A blog might be the voice of a department (such as human resources) or of an individual (such as you). A blog is like a column in a newspaper — it's there when you look for 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 in. Or you could evaluate or summarize something for the team, providing a way for others to give feedback through their comments on your blog.

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



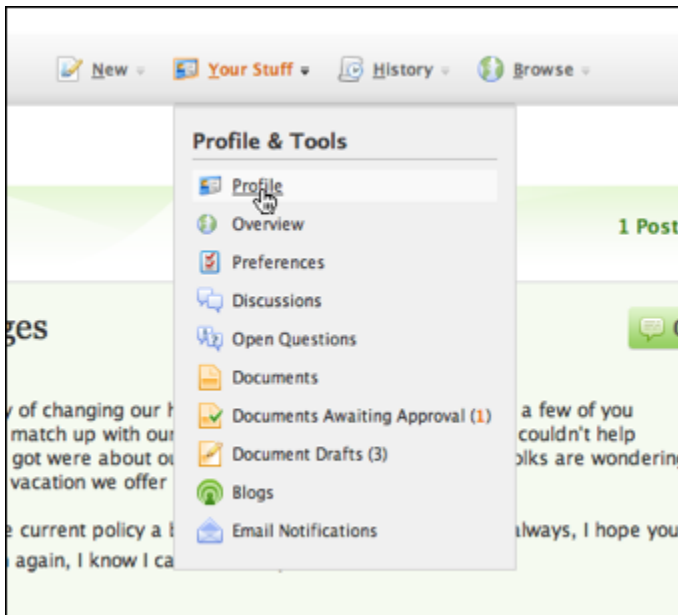
2. If you're prompted, select the space in which you want your blog to appear.
3. Notice that the blog editing page is very much like the discussion and document editing pages: the same rich text and plain text editors are available, along with a preview tab. Notice, too, that you get a number of shortcuts 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. The **Extended Options** section expands when you click its title. There, you can set options specific to this post — even set it to be published at a certain time.
4. In the editing window, type a title and the content of your blog post.



5. 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 easier for others to find.

Create a profile. Your profile is a quick way for other members of your team to find out more about you. It 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 team 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 people 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 preferences.

Username:	gladys
Name: *	<input type="text" value="Gladys Kravitz"/>
Email: *	<input type="text" value="gladys@example.com"/> <input type="button" value="Show"/> <input type="button" value="Hide"/>
Location:	<input type="text" value="Portland"/>
Title:	<input type="text" value="HR Manager"/>
Phone Number:	<input type="text" value="(503) 555-2998"/>
Biography:	<input type="text" value="Born and raised in Portland, I live with my husband and two kids in Sellwood."/>
Expertise:	<input type="text" value="Human resources, benefits, stock, cross-country skiing, playing the lute."/>
Your Image	<input type="text"/> <input type="button" value="Browse..."/>

Collaborate on Content

Nearly everything you do in Clearspace is about collaboration. Content you add is almost always visible and searchable by everyone (unless you've explicitly indicated that its visibility should be limited to certain people). Other people read your work, you read theirs. You get ideas from someone else's blog, they comment with suggestions on your document.

But Clearspace provides ways through which you can manage collaboration. For example, you can say that only certain people are collaborating on a document with you. You can say that some of these people can edit the document, while others must approve it before it's visible to everyone.

Note: Publishing a document always makes it visible to everyone who can read documents (which is typically everyone using Clearspace). If you want to limit a document's visibility, save it as a draft!

Add collaborators. When you first create a wiki document, you limit its visibility by setting its collaboration options. When you add people to edit and approve a document, you're giving them special roles in what's called the document's "workflow." In other words, work on the document starts in one place — a draft — and moves through a process — possibly more drafts, review, and approval — until it's ready for publishing.

1. Click **New > Document** to create a new document.
2. Scroll to the bottom of the page and click **Collaboration Options**.
3. In the **Specific Users** box, enter the Clearspace user names of the users you want to be able to see and edit the document. (You can also click the Just <my_name> option if you want to be the only person who can see and edit.)



The screenshot shows the 'Collaboration Options' dialog box in Clearspace. At the top, there is a 'Tags' section with a text input field containing 'benefits performance_review' and a list of 'Popular Tags' including 'benefits', 'dentist', 'doctor', 'employee_manual', 'hr', 'hr_policies', 'jobs', 'money', 'performance_review', and 'policies'. Below this is the 'Collaboration Options' section, which is expanded. It contains three sub-sections: 'Users who may edit:' with radio buttons for 'Anyone', 'Specific Users' (selected), and 'Just Gladys Kravitz'. The 'Specific Users' field contains 'gladys, betty' and a '- Select Users' link. 'Users who must approve for publication:' has a field with 'gladys' and a '- Select Users' link. 'Comment Policy:' has radio buttons for 'Open (Comments are allowed)', 'Closed (Existing comments will be displayed, new comments are not allowed)', and 'None (Comments will not be displayed, new comments are not allowed)'. At the bottom, there is a checkbox for 'Minor edit, don't send notifications' and four buttons: 'Submit for Approval', 'Save and Continue', 'Save Draft', and 'Cancel'.

4. If you want certain people to be required to approve the document before it's published and visible to others, enter their user name in the box under **Users who must approve...**
5. Under **Comment Policy**, choose how you want comments to the document handled.

6. When you're done editing the document, be sure to click **Save Draft** rather than **Publish**. (Clicking **Publish** will make the document visible to everyone!)

After you've saved the document, you can come back later to edit these options by clicking the **Manage Collaboration** link in the Actions box. The people you added to edit and approve the document will be able to get to this document from their **Your Stuff** menu and from the Overview tab of their own profile.



The screenshot shows a user profile for Gladys Kravitz. At the top, there is a profile picture and the name "Gladys Kravitz". Below the name are several navigation tabs: Profile, Overview, Discussions, Documents, Blog Posts, and Email Notifications. The main content area is divided into two sections. The first section is titled "Documents That Need Your Approval" and contains a single document entry: "Performance review ratings" by Gladys Kravitz in HR. The second section is titled "Your Drafts" and contains a table with the following data:

Documents	Status	Last Modified
Performance review ratings in HR	Not Yet Approved	May 7, 2007

The document itself will also let approvers know that it's time to approve.



The screenshot shows a document approval interface. At the top, there is a blue bar with the text "Approve or Reject This Document : ". Below this is a yellow box with the text: "This version of the document is awaiting approval, and is therefore not visible to the space. Only authors or approvers can currently access it. Once all approvers have approved the document, it will be published and visible to the space." At the bottom, there is a document entry for "Performance review ratings" with a version number of "VERSION 2" and a status of "NOT YET APPROVED".

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 people have added. Give it a try!