Clearspace Help

Use this list of frequently asked questions to get help on how to do things in Clearspace. For a step-by-step tour of Clearspace, be sure to see the *Clearspace Quick Tour*.

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Getting Started

What can I do in Clearspace?

Clearspace is a collaboration application that you use through a web browser. In Clearspace you can:

- Create and find content. From documents to blogs to discussions, pick the best vehicle for your thoughts. For more information, see:
  - What kinds of content can I create? (page 10)
  - How can I find content? (page 22)
- Ask questions. Discussions and polls provide ways to take the pulse of your community. Also see:
  - What can I do with discussions? (page 13)
  - How do I create a poll? (page 22)
- Share ideas and ask for feedback.
  - What can I do with blogs? (page 11)

  - What can I do with discussions? (page 13)
- Collaborate with other people.
  - What does it mean to collaborate in Clearspace? (page 20)
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  - How can I find content? (page 22)
  - How do I get notified about changes to content? (page 24)

How can I use the keyboard to control Clearspace menus?

You have access to Clearspace menus through the keyboard. The exact keyboard combination will vary depending on which browser you're using, as show in the table below. Note that once the menu is open you can use the up and down arrow keys to navigate; press ENTER to select an item.

Menu or Command	Firefox 2.0	Firefox Before 2.0, Internet Explorer 6 and 7	Firefox 2.0 on Max OS X
New	ALT+SHIFT+N	ALT+N	CTRL+N
Your Stuff	ALT+SHIFT+Y	ALT+Y	CTRL+Y
History	ALT+SHIFT+H	ALT+H	CTRL+H
Browse	ALT+SHIFT+B	ALT+B	CTRL+B
Search	ALT+SHIFT+S	ALT+S	CTRL+S
Login	ALT+SHIFT+L	ALT+L	CTRL+L
Register	ALT+SHIFT+R	ALT+R	CTRL+R
Print	ALT+SHIFT+P	ALT+P	CTRL+P

How can I personalize my view of content?

You can personalize the Clearspace home page so that it shows the things you care about most. As you and others use Clearspace, the amount of content there will grow. You'll develop a preference for certain people's blogs, for discussions in certain areas, and you'll learn that some areas just rarely have something you need. When personalizing your view, you use widgets, which are windows on content either inside and outside of Clearspace.

To start personalizing your home page, click the **Your View** tab, then click the **personalize** link. Clearspace will display a layout screen with a set of widgets listed at the top and a default layout beneath it. Here are a few simple steps for customizing:

1. In the layout area beneath, find widgets you don't want displayed on the page and click their **Remove** button (that's a red X in the widget's upper right corner).
2. In the widgets list above, find widgets you want and drag them onto the layout area.
3. Tailor a widget to your needs by clicking its **Edit** button (that's a little pencil in the upper right corner).

4. In the widgets list above click the **Choose layout** link to arrange your layout's columns.
5. Repeat steps 1 through 4 until you have what you want, then click **Save**.

You'll probably spend a lot of time in your personalized page, but if you ever want to see the full view of content again, click the **All Content** tab.

How can I set default preferences for things like notifications, time zone, and locale?

Go to **Your Stuff > Preferences**. On the **Your Preferences** page, you'll be able to set your locale and time zone. You can also set whether a discussion thread and its replies should be displayed all on one level (**flat**) or indented hierarchically (**threaded**).

You might want to ensure you have the right locale chosen here if you intend to use Clearspace from web browsers set to another locale — such as in an Internet cafe in another country, for example. Your preference here takes precedence. By the same token, if you want to make sure you use the locale set by an administrator for the entire community, make sure that your web browser doesn't have a locale set (or else the browser locale will override the community setting).

In the email notifications preferences you can set whether you should automatically get an email when you create or comment on content.

Connecting With People

How can I find people?

You can search for people based on the content in their profiles, very much as you would search for content. This works even better when you and other people add to your profiles information that the rest of the community might be interested in. For example, you could add a list of the things you're skilled at, a list of your interests, and so on.

To find people, click **Browse > People**. On the **People** page, enter the terms you want to search for, then click Search. You can click **More options** to tell Clearspace what parts of profiles you want to search. If you get a lot of results from your search, you can narrow the list further by using the filter options to the right of the list.

When you click the name of someone in the search results list, you can get their profile and a lot more. You also get lists of the person's content, tags they commonly use, and more.

How do I invite people to join Clearspace?

If it's enabled for your application, you can invite people from outside the application to join. When you invite them, they'll receive an email with instructions on how they can join.

Go to your profile (at **Your Stuff > Profile**) or to a space home page. In the **Actions** list click **Invite friends to join**. Fill out the short form to build the email that they'll receive, then click **Invite Friends**.

How do I send private messages to other people in Clearspace?

If the private messaging feature is available for your site, you can send messages to other people who use Clearspace. Click **Your Stuff > Private Messages**, then click **Compose Message**.

Notice that you can manage private messages in the way some applications let you manage email. In addition to receiving and replying, you can create new folders for storing messages, save drafts of messages in progress, and so on.

Connecting Through Social Groups

What are groups?

A group is a place for you to connect with people who share an interest. A group can be about anything you like, such as a work-related interest or a favorite sport. People join a group to connect with discussions, keep track of things with documents, and have their say with posts to the group's blog.

When someone creates a group, they say what kinds of content the group can contain and who can join. Here are a few things to know about groups:

- A group can be about anything. No, really: a company soccer team, Linux hacks, or the latest uber-techno-house-hop releases.
- A group can contain documents, discussions, and blog posts, just as a space can. The group's owner decides what's allowed.
- A group can be open to all, hidden, and "by invitation only." It can be set up so that no one but its members can see it. It can also be visible, but set up so that its owner must give permission for people to join.

How do I find a group?

You can view a directory of groups by clicking **Browse > Groups** to get to the main groups page. On that page, you can also search for groups. Of course, you can also search from anywhere in Clearspace by using the seach box at the top of each page.

A group can be easier to find when the group's owner has added tags that help describe what the group's about.

How do I create a group?

Here are the steps to create a group:

1. Click **New > Group**.
2. On the **Create a new group** page, enter details for the group you're creating:

Setting	What It Means
Group Name	The name you want to show up at the top of the group page. This will be used at the end of a URL that links to the group (though you can change the URL by clicking the **Edit** link).
Group Description	This will show up on the group's main page. Capture what the group's about in a way that will attract other people who might be interested.

Setting	What It Means
Tags	Enter words or short phrases that will help other people find your group. Enter words that describe your group's focus. To separate the words, put a space between them (you don't need commas).
Group Image	A picture to display on the group's main page.
Group Type	Choose a type that will determine whether your group can be seen by others and whether they can participate. With an **open group**, anyone can view content or participate at any time. In a **members only** group, anyone see content, but only those who've joined can participate. A **private** group is known to non-members, but only members can see content or participate. People can only become members after being invited or approved by the group's owner. A **secret** group is invisible to all but its members. People can become members only by being invited.
Additional Features	What kinds of content should the group contain?

3. Select which features you want your group to have. People will be able to create the kinds of things you select.
4. Click **Create group**.

How do I change a group's details?

If you're a group owner, you can edit details such as the group's name, description, and so on — pretty much the same things you entered when you created the group. To edit this information, go to the group's main page, then click **Edit group details** in the **Actions** list.

How do I customize my group's overview page?

If you're a group owner or administrator, you can customize the group's **Overview** page with widgets. Go to the page, then click the **customize** link on the **Overview** tab. You can drag widgets from the list at the top of the page, then arrange them on the page as you want them. For more information on customizing, see *Designing Pages with Widgets*.

Managing Group Membership

How do I invite people to join a group?

A group's owner can invite other people by using Clearspace to send them an email. Go to the group's main page. In the **Actions** list, click **Invite people to join this group**. In the form you get, enter the email addresses of people you want to invite and feel free to edit the message however you like. Keep in mind that if you're using a private version of Clearspace, people who aren't already using it might not be able to join your group.

If people you want to invite are in your email address book, you can import their contact information. First, export contact information from the email application as a CSV file. After you've exported, on the **Invite People**... page, click the **Import Contacts** link to import the information into Clearspace.

Depending on how the group's set up, the group's owner might need to approve the new member.

How do I invite people from my contact list to join a group?

You can import contacts from your email program or other contact tracker. You'll need to first export the contact list as a comma-separated values (CSV) file from your email program. Most email programs give you the ability to do this.

Once you have the contact list as a CSV file, go to your group's main page and click Invite people to join this group. There, click the Import contacts link and browse for the CSV file.

If you want to delete or resend invitations, you do so while managing group membership. This can be handy if you've got a lot of outstanding unanswered invitations. Go to your group's main page, then click **Manage group members**. On the Manage group members page, click the **Open Invitations** link and select the names of people whose invitations you want to delete or resend. Use the dropdown above the list to select the action you want to take.

How do I add, delete, or ban new members?

Go to your group's main page, then click **Manage group members**. On the **Manage group members** page, select check boxes for the members you want to manage.

For the members you've selected, you can ban them from participating, delete their membership, send them messages, and more. You can also export their member information as a contact list you can then import into another application, such as an email address book.

You can change a selected member's role from administrator to member, or back the other way. An administrator role lets the member make the same kinds of changes you can make as the group's owner (except delete the group).

How do I change, add, or remove group administrators?

A group's administrator has almost all the same abilities to management a group as the group's owner does.

Go to your group's main page, then click **Manage group members**. On the **Manage group members** page, select check boxes for the members you want to manage.

For the members you've selected, choose an option from the dropdown, such as **Change Role to Administrator** or **Change Role to Member**.

Connecting as Friends

What are friend connections in Clearspace?

You can add people as friends went you want to keep up with what they're working on. When you create friend connections, Clearspace will show you the things they've been doing — posting to discussions or their blog, creating documents, and so on. You can also send messages to your friends.

This information appears on the **Connections** tab of your profile. You can also add a widget to follow friends when you personalize your home page.

When you add someone as a friend, you're said to be following them. On your **Connections** tab, you can see a list of the people you're following as well as a list of those who are following you.

To get started, go so someone's profile and add them as a friend.

How can I add someone as a friend?

To add someone as a friend, go to their profile, then click the **Add <person's name> as a friend** link. If you've created labels to group your friends, you'll be prompted to apply a label to the friend you're adding.

You can remove a friend on your connections page. Go to **Your Stuff > Connections**, then find the person you want to remove in the list of people you're following. The remove them, click the **Remove** link on their listing.

How can I see what my friends are up to?

The easiest way to keep up with friends is on your home page. When you personalize your home page, you can add the **Connection's Recent Activity** widget. This one is like the **Recent Activity** widget except that it lists activity by your friends only. As your friends create new documents, make discussion or blog posts, and so on, what they do will show up in the widget.

You can also see what your friends have been doing by going to the page at **Your Stuff > Connections**.

How can I group people to make them easier to keep track of?

You can create labels to group your friends. When you apply a label to multiple friends, the label becomes a way to group those friends and filter your friends list to include only people with certain labels.

To create a label, first view your connections by going to **Your Stuff > Connections**. Under **Labels**, click **Add/ edit labels**, click **Add new label**, enter the label text, then click **Save**.

To apply a label you've created to a friend, start by going to **Your Stuff > Connections**. Locate the friend in the list of people you're following, then click the **Labels** link on their listing. In the box that appears, under **Apply label**, click the label you want to apply. To remove a label, click the **Labels** link, then click the label under **Remove label**.

Creating Content

What kinds of content can I create?

Content you create in Clearspace includes documents, uploaded files, blog posts, discussion posts, and the comments people associate with these. (In a way, profiles are also content because when you search for something, you get profiles, too.) You'll probably find that each of these types of content is best for particular uses. Be sure to see recommendations for documents (page 10) , blogs (page 11) , and discussions (page 13) . You can also read more about the differences (page 10) between them.

To create new content, click the **New** menu, then click the type of content you want to create.

What's the difference between a document, a blog post, and a discussion?

Documents, blogs, and discussions were born and raised on the Web, so you use them in Clearspace as you would there. The following table suggests ways to think about the content types.

	Document	Blog	Discussion
Purposes	Collaborate with others on a single document; capture information that should be available for a while; create a report, agenda, or meeting notes. See What can I do with documents? (page 10)	Express a point of view; call something timely to others' attention; make a proposal to get feedback from others; ponder an idea. See What can I do with blogs? (page 11)	Ask a question of the community; ask for suggestions; make a short observation or assertion to get feedback; report a problem. See What can I do with discussions? (page 13)
Format	Most of the content is in the document itself, with some added in comments by readers and authors.	Most of the content is usually in the initial post, with other content added through comments by readers.	Most of the content tends to be in responses to the initial question.
Style	More formal, often in the third person.	Informal, usually in the first person.	Informal, usually in the first person.
Authoring	Clearspace rich text editor. Same as for blog and discussion posts.	Clearspace rich text editor. Same as for documents and discussion posts.	Clearspace rich text editor — rich or plain text with preview. Same as for documents and blog posts.

What can I do with documents?

Clearspace is a place to create and keep track of documents. You can use the built-in documents to author and edit content or you can upload files from outside Clearspace.

- **Documents** are great for when a document will have more than one author — such as a document that describes team plans or one that will need to be reviewed by others before it's ready to publish to others. They're also an ideal place for just stashing information you want to hang on to for a while, such as a list of insurance contacts for the Human Resources department.
- **Uploaded files** give you a way to include files authored with another tool, such as Microsoft Word or Adobe PDF files.

For documents and uploaded files, you can:

- Specify the people who can edit a document, or who must approve it for publication in Clearspace. For more information, see How do I create a document that other people can work on? (page 20)
- Manage versions (page 14) (of documents) so that you can see what changed from one version to the next.
- Receive email notifications (page 25) to know when the document is changed.
- Assign tags and tag groups (page 23) to make the document easier to find by others.
- Display images (page 13) .

To create a new document, click **New > Document**.

What can I do with blogs?

Posting to a blog is a great way to say something individual to other people on Clearspace. Use a blog to express an opinion, call attention to something noteworthy you've seen (such as an article on the Internet), or make a proposal. Other people can comment on your blog posts, so that a blog is a great way to pitch ideas that could impact the team or the company. Of course, you can comment on posts, too.

Your Clearspace setup might include several blogs, each allowing posts from specific people. For example, you might see "Bill's Blog" (with posts from Bill) or "Human Resources Blog" (with posts from people in the HR department). Your Clearspace administrator creates blogs, associating them with particular people. If you've got something to say, get a blog going!

With blogs, you can:

- Assign tags when you're editing the blog.
- Import content from another blog. You'll need to first export the content to Movable Type format, then navigate to your Clearspace blog, click **Manage Blog**, then click **Import**.
- Save the blog as draft before you're ready to publish. When you're editing, click the **Save** button.
- Display images (page 13) .

To view blogs, go to the Clearspace home page and click **Blog Posts**. To post to your blog, click **New > Blog Post**, select the blog you want to post to, then click **Create new blog post**.

To create a new blog post, click **New > Blog Post**.

How can I manage my blog?

If you've got a blog, you can use its **Blog Management** page as a kind of dashboard to manage it. To manage your blog, click the **Your Stuff > Blog** menu, then click the name of your blog.

The kinds of things you can do there include:

- Write a new post.
- View the latest posts, comments, and trackbacks (a trackback is a link to a blog that has linked to yours).
- Import other blog content that's in the Movable Type format. This includes content exported from TypePad, WordPress, and Roller.
- Subscribe to content or comment feeds from your blog (the feed technology used is set by a system administrator).
- Set the blog's name and description, moderate comments and trackbacks, protect the blog by requiring commenters to log in, and turn its feeds off.

How can I decide which comments and trackbacks appear with my blog?

You can moderate your blog, choosing which comments and trackbacks associated with a post are visible to others. For example, you might want to remove a comment that includes language that's inappropriate to the spirit of your blog.

Also, there might be some trackbacks that you don't want displayed with a blog post. When someone links to your blog post from another application (such as another blog) that supports trackbacks, your blog displays a trackback link to the other application. In most cases, trackbacks are a great way to give your readers links to other related posts (without any work on your part!). But in some cases, someone might link to your post from a site that's inappropriate or unwanted.

Your community's system administrator can enable or disable features related to blogs, including comments and trackbacks. As the blog's owner, you can manage whether comments and trackbacks should be held for your approval before they're published. To set these options, go to your blog management page by visiting your blog, then clicking **Manage Blog**. To set moderation options, click the **Options** link under **Blog Shortcuts**. To moderate, use the **Comments** and **Trackbacks** links under **Blog Shortcuts**. There, you can view information about each comment or trackback, approving or deleting each as you choose.

Note: If your community is visible to the public, chances are trackbacks and comments are enabled by default. If a system administrator hasn't disabled them, you might consider turning on moderation for these features — at least for a while, just to be on the safe side.

How do I import content from another blog into my Clearspace blog?

If you've got a blog in Clearspace, you can import content from your other blogs. You'll need to first export content from those blogs into the Movable Type import format. Some blogging tools offer the ability for you to do that pretty easily.

Once you've got your exported content, you can import it into your Clearspace blog using the following steps:

1. In Clearspace, go to your blog's **Blog Management** page.
2. Under **Blog Shortcuts**, click **Import**.
3. At the **Exported file** box, click **Browse** and select the file you exported from your other blog.
4. Click **Upload File** to import.

Note: If you export content from Wordpress, you might need to do a little editing of the exported content before you import it. When your Wordpress blog posts include HTML tags, the file exported from Wordpress omits tags needed to tell Clearspace that the HTML is there. You'll need to enclose the content in <body> tags before importing. Here's an example:

Before

This is my BOLD HTML example.

After

<body>This is my BOLD HTML example.</body>

What can I do with discussions?

Discussions are made for brief questions or ideas you want the community to see. Usually you make a discussion post when you want to get quick feedback or know the answer to something. You can specifically mark a discussion as a question (page 21) , such as when you have a specific question that another person probably has the answer to. That will help ensure that your question gets the kind of attention it needs.

When a discussion thread collects information that you want to preserve for other uses, you can save the discussion as a document. For more information, see How do I convert a discussion thread to a document? (page 15)

With discussions you can:

- Attach files. Click the **Browse** button while you're editing the discussion.
- Display images (page 13) . Click the **Insert Image** button while you're editing.
- Assign tags and tag groups (page 23) . Enter tags in the **Tags** box.

To make a new discussion post, click **New > Discussion**, select the space you want the discussion to live in, then click **Create New Discussion**.

How can I use HTML in my content?

You can use the **Insert Raw HTML** menu (from the content editor's toolbar) to add HTML markup to your documents, blog posts, and discussion posts. When including HTML, switch to the plain text editor. You can type text before and after your HTML.

Some kinds of HTML markup can cause the site to be less secure. For this reason, certain HTML tags aren't supported by default. When you use these tags in the code macro, Clearspace will remove them before displaying the content (although they'll be there when you return to edit the content). Here's a list of what's not supported:

Tags: <embed>, <html>, <head>, <iframe>, <link>, <meta>, <object>, <script>, <style>

Attributes: action, class, method, on* (such as onClick), *src*

How do I display an image within content text?

You can include an image in the text of documents, blogs, and discussion posts. Here's the step-by-step process:

1. Navigate to the content and click the link to edit it.
2. Click the **Insert Image** button on the toolbar.
3. In the **Insert Image** page, click **Upload Images** to browse for the image you want to add.

4. Select the image file name and click **Select**. The image will be inserted.

Note: Keep in mind that big images don't scale to a smaller size when you view content as a PDF file. If you think it's likely that someone will want to view or save your content as PDF, then you should make sure that the image displays completely in the content in your web browser. You can also test the display by viewing the content as a PDF yourself.

How do I display video within content text?

You can have video from another site, such as Vimeo.com or YouTube.com, displayed in your content. The video itself isn't attached to your content, but linked from the site itself.

1. Navigate to the content and click the link to edit it.
2. Click the **Insert Video** button on the toolbar.
3. In the **Insert Video** page, select the type of video you want displayed (such as Vimeo or YouTube),
4. Enter video information by pasting it into the URL/code box. You can get that information from the video site. For example, when you're watching a YouTube video you'll find an embed box with the code inside. Here's an example (yes, they can be kind of long!):

```
<object width="425" height="344">
    <param name="movie" value="http://www.youtube.com/v/mji4nAk_8ZY&hl=en&fs=1"></param>
    <param name="allowFullScreen" value="true"></param>
    <embed src="http://www.youtube.com/v/mji4nAk_8ZY&hl=en&fs=1"
        type="application/x-shockwave-flash" allowfullscreen="true"
        width="425" height="344"></embed>
</object>
```

5. Copy that code from the site and paste it into the URL/code box in Clearspace.
6. Click **Insert** to add the video into your content. When you publish the content, others will be able to play it.

How do I upload a file (such as a Word or Excel file) so that other people can see it?

Uploading a file is a great way to include an externally-authored document or track its progress using Clearspace. For example, you can upload a document, then add collaborators so that it gets reviewed by other team members.

You can also attach files to other content, such as documents, discussion posts, and blog posts.

To upload a file, click **New > Document**, then click **Uploaded File**.

How do I see how a document was changed between versions?

You can view the differences between two versions of a document that has been edited and published multiple times. You can also delete specific versions or restore a previous version so that it is the current version.

To manage a document's versions, navigate to the document and then click **Manage Versions**. On the **Manage Versions** page you can view changes in one version from the preceding by clicking the **Changes** icon for the later version; you can select the check boxes for any two versions to compare them. You can also restore and delete previous versions.

How do I move a discussion thread to another space?

To move a discussion thread from one Clearspace space to another, navigate to the discussion and click **Move Thread**.

How do I convert a discussion thread to a document?

When you want to save a discussion into another format — such as to preserve its information for another use — you can convert the discussion thread to a document. When you do, Clearspace will create a new document that contains the original post and all replies in the discussion. You can edit the new document and save it. The discussion itself will not be removed.

To convert a discussion to a document, navigate to the discussion, then click **Convert thread to document**.

How do I lock a thread so others can't comment on it?

If you're an administrator or moderator, you can ensure that no one will be able to add more replies to a discussion thread. Navigate to the discussion thread and click **Lock Thread**.

How do I post new content without logging in to Clearspace?

You can post new content simply by sending an email to Clearspace (if the feature is enabled). You can view a list of the email addresses for spaces, projects, and groups that you're watching or are a member of, along with addresses for blogs you're an author on. To post content, send an email to the address you want. The subject line of your email will be the posts title, while the email's body will be the post's body. To view the addresses, in Clearspace go to **Your Stuff > Mailing Lists**.

This can be especially handy for posting when you're away from your computer and can't open Clearspace in a browser. For example, you could add your mailing list email addresses to your email address book. if you have a mobile device (such as a cell phone) that sends email, you'd have access to the addresses to make new Clearspace posts when you've got only your phone to do it with.

How do I post a reply without logging in to Clearspace?

If you're subscribed for email notifications to content, you can post a reply simply by replying to notification email. For example, imagine you're subscribed to notifications on a discussion thread. When someone posts a reply to the discussion, you'll get an email about it from Clearspace. Reply to the email, type your discussion reply just as you'd type a reply to any email, then send the email. If Clearspace is set up to receive replies via email, your reply will be posted as if you'd logged in and posted it.

When posting this way, be sure to leave the special code at the end of the subject line. The code will be numbers and letters in square brackets, like so: [Xxxxx-xxx-xxxx].

Note: The post-from-reply feature isn't supported when the reply is a digitally-signed email.

How can I make the most of the content editor?

When you create or edit discussion posts, blog posts, documents, and the like, you use the content editor built into Clearspace. The editor includes many of the features you'll find in other word processing programs. Using its buttons and commands, you can format text to look as you want it to, embed images and video, insert links, and more.

This topic lists some of things you can do in the editor.

Using the Toolbar

The content editor's toolbar is pretty similar to what you'll see in many word processing programs. Use these tools to format text and images, video, and insert special formatting. The things you can do are described in more detail below.

Tip: Check out the tooltips! Each of the buttons on the toolbar displays its name when you hover your mouse pointer over the button for a second or two.

Checking Spelling

The editor includes a way to check spelling when you want to. Click the **Toggle spellchecker** button at the far right of the toolbar to check spelling for the content that's currently in the editor window. When it's on, misspelled words will be underlined with red lines.

Click a misspelled word to view suggested alternate spellings, then click the suggestion that matches what you want. Click outside the **Suggestions** list, somewhere else in the window, to make the list go away.

Click the **Toggle spellchecker** button to turn off the red lines. Note that the feature won't check spelling as you type. Click the button again to recheck spelling.

Note: You can change the language used for spellcheck by clicking the little down-pointing arrow at the right side of the **Toggle spellcheck** button.

Resizing the Main Window

You can change the size of the editor window by clicking the window's lower-right corner and dragging the corner up or down. (You can't make the window wider or narrower except by resizing the browser window itself, but you can make it taller or shorter.)

Viewing Content in HTML

As you're writing your content, the editor is behind the scenes creating HTML code so your content can be displayed in the web browser. If you're well-versed in HTML, you can create more ambitious formatting effects by editing that underlying HTML directly. You click the **HTML** link at the right of the toolbar to display the HTML markup; click **Show Full Editor** to go back.

Be careful with this feature, though. It's actually not all that difficult to mess up the way your content looks by incorrectly editing the HTML. If you're going to be doing a lot of editing this way, you might want to have a full-featured HTML editor handy. You can copy the generated HTML markup out of the content editor HTML window and paste it into your HTML editor while you work on it. When you're finished, copy the edited markup back into the content editor's HTML window.

Note: To help keep your content safe, there are a few HTML tags that will be ignored when the editor translates your content into something everyone can see. You can include them and they'll be saved, but they won't render when someone views your content. These tags include: <script>, <iframe>, <style>, <link>, and <meta>.

Formatting Text

Pretty much all of the basic formatting tools you see in word processors are available in the content editor.

Formatting Text

You can:

- Make text bold, italic, underlined, and struck through. You can also make it particular color.
- Change the typeface and size.
- Apply a style, such as for headings.

To format particular characters, select the text in the editor, then click the button for the kind of formatting you want.

Inserting Links

You can insert links to sites on the web and to content in your community.

One way to start creating a link is to select the text you want people to click when they go to the place you're linking them to. You can also put your cursor anywhere, without selecting, then click the **Insert Link** button. If you do that, then the text people click will be the title of the community content or the URL to the external web site. Even after you insert the link, though, you can still change the text people see. In the editor, click inside the link text, then start deleting or typing to enter text you want.

When you want to link to community content, you can search for the item you want to link to or browse the list of content you've looked at lately. Click the item you want, then click **Insert**.

Note: Links to external web sites need to begin with "http://" or "https://", which indicate to the browser that you're linking to a web page. In other words, entering merely "www.example.com" won't work -- it needs to be "http://www.example.com".

Adding Emoticons

You can embed emoticons, which are little images you can use when text alone just isn't enough. Click the **Emoticons** button to see the list of images you can embed.

Indenting and Aligning Text, Working with Lists

Some formatting effects larger blocks of text, such as paragraphs. That's what you're doing when you're making lists, indenting, or aligning.

Inserting Bulleted and Numbered Lists

You can create numbered or bulleted lists. One way to start is to type the items you want for your list, then select and format them (by clicking the list button you want). To remove the list formatting, select the list text, then click the list button you clicked to format it originally.

If you want to make a list that has indented sub-lists, start by making your list, including a sub-item or two at the same level as the others. Then select the sub-items and click the indent button. You can also have sub-list items use a different character than their containing list -- such as letters instead of numbers. See the section below on list style for more information.

You can set a list's display style, such as whether it uses numbers or letters for individual items. To set the style for an ordered, or numeric list, select the list text you want to format, then right-click, point to **List Style**, and click the style you want. Here's a list of the available styles:

- None -- Use nothing -- no numbers, letters or bullets.
- Inherit -- Use the style that the containing list uses. This option is only available then the selected list item is a child of another list.
- Decimal -- Use a number with a decimal after, such as "4."
- Decimal with Leading Zero -- Use a number with a zero preceding, such as "04."
- Upper Roman -- Use an upper-case roman numeral, such as "IV".
- Lower Roman -- Use a lower-case roman numeral, such as "iv".
- Upper Alpha -- Use an upper-case letter, such as "D".
- Lower Alpha -- Use a lower-case letter, such as "d".
- Lower Greek -- Use a lower-case Greek character.
- Katakana, Katakana-Iroha, Hiragana, and Hiragana-Iroha are used in Japanese writing.
- Cjk-Ideographic are used in Chinese writing.
- Georgian is used in writing for the Georgian language.
- Armenian is used in Armenian writing.
- Hebrew is used in the Hebrew language.

Aligning Sections

You can align text in a paragraph left, right or center. You can also justify paragraph text so that both its left and right edges follow straight lines. To change alignment, simply put your cursor anywhere in the paragraph you want to format, then click the alignment button you want.

Indenting and Outdenting Sections

Indenting can be a handy feature to have. Of course, you can use it to call attention to blocks of text. But you can also indent items in a list to have them become part of a sub-list. To indent text, select the text you want, then click the **Indent** button. When you want to outdent in order to "undo" indenting, put your cursor in the section and click the **Outdent** button.

If you're indenting a paragraph because the text is quoted from somewhere else, keep in mind that the editor has a special way to handle quoted text. See that section for more information.

Working with Quoted Text and Code

Sometimes you want to call out sections of text (such as paragraphs) with different formatting.

Formatting Quoted Text

When you quote paragraphs of text you found somewhere else, such as in another person's post, it's a good idea to format it as quote text. That way, other people can easily see what's yours and what's someone else's.

When you format text as quoted, the published text will appear in a box that has grey shading. To do this, highlight the text you want to format, then click the **Insert** button and select **Quote**.

Formatting Code

The editor provides special support for formatting text that's from languages used by programmers, or text that needs to look plain and unformatted. To apply the formatting described here, select the entire block of text you want to format, then click the **Insert** button and point to the formatting style you want. Note that these commands are intended for use with entire paragraphs, rather than just a few words. Trying to use these commands with a few words inside a paragraph will

Here's a list of what you can do:

- Format text as plain -- like old-style typewriters made -- with the **Plain** command.
- Use the **SQL**, **XML**, and **Java** commands to format your text so that its syntax is highlighted when then content is published.
- If you're familiar with HTML, you can use the **Insert Raw HTML** command to add HTML markup that will be rendered when the content is published. In other words, if you insert `<b>this is bold</b>`, you'll get **this is bold**. This is a way to add simple HTML.

Working with Tables

Once you've got a table, you'll find that you can make a lot of the changes you want by right-clicking the table. When you right-click, you'll get a set of menu commands you can use to insert, remove, and change settings for rows, cells, and columns.

Adding or Deleting a Table

To add a table, put your cursor in the place where you want the table to appear, then click the **Insert Table** button. The editor will display a box where you can set your table's properties -- how many rows and columns, etc. You can also change these properties after you've created the table. To do that, right-click the table, then click **Table properties**.

Adding or Removing Rows and Columns

Right-click the table to view commands for adding and removing rows and columns. For example, if you want to insert a row between two rows, right-click the second row, point to **Row**, then click **Insert row before**.

Tip: A shortcut for adding rows to the bottom of your table is to use your computer's tab key. When you press tab, the editor advances the cursor from one cell to the next, then from the last cell in the row to the next row. When the cursor has reached the most lower-right cell, pressing the tab key creates a new row with the same number of cells as the preceding row.

Moving and Copying Rows and Columns

You move a row or column by cutting or copying it, then pasting it before or after another row or column to get it where you want it. For example right-click the row or column you want to move, point to **Row**, then click **Cut table row**. Next, right-click the row you want the first row to appear beneath, point to **Row**, then click **Paste table row after**.

Splitting and Merging Cells

You can merge two cells into one or split cells you've merged back into two. For example, to merge cells, select the cells you want to merge, right-click the table there, point to **Cell**, then click **Merge table cells**.

Adding a Table of Contents

The editor includes a feature that automatically generates a hierarchical table of contents based on the headings in your content. When you insert the table of contents in your content, the editor looks at the headings your content uses, including their levels (Heading 2, Heading 3, and so on). Based on the heading levels, the editor creates links to the headings, indenting the links at similar levels.

To insert the table of contents, click **Insert**, then click **Table of Contents**. While you're editing the content, the presence of the table of contents will appear as an icon.

In the saved or published version of the content, the icon will be replaced with a hierarchical list of links to headings in your content.

Collaborating

What does it mean to collaborate in Clearspace?

Clearspace is designed for collaboration. Over time, as you and others use Clearspace -- adding and tagging content, capturing ideas in documents, expressing ideas in blogs, asking and answering questions in discussions -- you'll find that the application shapes itself to your needs. Through your collaboration, you'll develop a list of tags that describes your content intuitively, a group of people who seem to always have answers when people ask, and a batch of ideas that arrive because you can see what others are thinking and working on.

In more concrete terms, with Clearspace you can:

- Work with others to co-author a document that you can all contribute to (document (page 10)). See How do I create a document that other people can work on? (page 20)
- Designate others as reviewers on a document. See How do I create a document that other people can work on? (page 20)
- Add or receive comments on documents, blog (page 11) posts, and discussion (page 13) posts.
- Create or respond to a poll (page 22) .
- Add tags (page 23) that you and others can use to find content.
- Share documents (page 21) with people not in your Clearspace community.

How do I create a document that other people can work on?

By default, when you create a new document, the new document allows multiple authors. In other words, by default anyone else can make changes. You can also limit the list of people who can make changes (page 20) .

How do I limit who can edit a document?

You can create a document that only certain people can see or edit. You can add editing collaborators at any time before you publish the document -- such as when you first create it or after you've saved it as a draft. You can also

While you're editing the document, click the **Collaboration Options** link beneath the tags box. Under **Users who may edit**, click **Specific Users** (to allow others to edit) or **Just <MyName>** (to allow only yourself to edit). If you want to allow specific users, click **Select Users** to browse for the names of people you want to be able to edit the document. For each person able to edit the document (including yourself), they'll be able to reach the document from their **Your Stuff** menu or in their profile on the **Your Stuff** tab.

While you're at it, you can also choose people who must approve a document before it can be published. (The space in which the document lives might also have people who must approve documents there. Their approval will be needed, too.)

Note: If you want to keep your document hidden, don't publish it! Once you publish it, it will be visible to anyone who can see documents in the space holding the document.

How do I make it so that someone must approve a document before it's published?

You can create a document that someone needs to approve before it can be published. You can do this at any time before you publish the document -- such as when you first create it or after you've saved it as a draft.

Note: An administrator might already have chosen someone to approve documents in a space.

While you're editing the document, click the **Collaboration Options** link beneath the tags box. Under **Users who may edit**, click **Specific Users** and enter the Clearspace user name of the person who should approve. You can also click **Select Users** to browse for the person's name.

How do I share a document with someone who doesn't use Clearspace?

If your Clearspace community supports document sharing, you can share a document with people who aren't in your Clearspace community. On the document you want to share, you'll find a **Shared Document** area (typically on the right side). Click the **Add a person** link and enter the email address of the person you want to share the document with. After you click **Invite**, they'll be sent an email that invites them to view the document.

If this is the first time that person has been invited to view content, they'll briefly register before they can view the document. They won't become part of your Clearspace community, but they will be able to view and comment on the document (and other documents shared with them). You'll be able to see their comments.

Also, the person you're sharing with might be interested to know that they can view content shared with them by people using other Clearspace communities. They only need to register once.

How do I announce something so that other people are more likely to see it?

You can post an announcement that will appear on the home page for a particular space.

To create an announcement, navigate to the space's home page and click **Create Announcement**. On the **Post Announcement** page, you can set the announcement text as well as when and for how long the announcement will be visible.

How do I ask a question?

Ask a question by posting it as a discussion. There might be another person who has the answer to your question and can post a reply. You can mark a discussion post specifically as a question when you create the post. (If you don't initially mark the discussion as a question, you have 15 minutes to change your mind. Within that time, you'll see a link in the discussion post.)

To post a question, click **New > Discussion**, then click **Create New Discussion**. Under **Post New Thread**, after titling and describing your question, be sure to select the **Mark this thread as a question** check box before clicking **Post Message**.

Note: You can also ask a question as a poll (page 22) .

If someone answers my question, how do I say so?

If you post a question and someone replies with information that you can use, it's a good idea to mark the reply as either helpful or correct. That way, others who have the same question can quickly see which replies might be most useful for them. A *helpful* reply is on the right track, while a *correct* reply answered your question. Keep in mind that you and others get more status points for posting replies that are marked as helpful or correct!

When you feel that your question has been answered, you should mark the original question as answered. That way, people will know whether or not to keep trying to answer your question.

How do I create a poll?

A poll is a way to ask a multiple choice question of other people in the community. When you create a poll, you define the question and the possible answers. The poll appears on the home page for the space it's created in. As people respond to the poll, results are shown graphically as colored bars. (Clearspace ensures that a person has only one opportunity to vote in the poll.)

To create a poll, navigate to the space where you want the poll to live. Under **Actions**, click **Create Poll**.

Finding Content

How can I find content?

There are three main ways to find things in Clearspace: by browsing, by searching, and by tags.

Browsing. One of the easiest ways to browse for content is to use the menus at the top of each page:

- The **Your Stuff** menu lists things that are specifically about you (such as your profile or preferences) or that you created (such as documents, blog posts, and discussion posts you made).
- The **History** menu lists pages you've looked at most recently. Note that this history is related to your browser's; if you delete your browser's history, your Clearspace history will go, too.
- The **Browse** menu gives you a way to go to the home page for a particular space or to pages where you can browse for blogs, discussions, and documents.
  You can also browse for content, people and by tags by clicking the links in the list at the right of the home page.

Searching. You can search for content using the search box in the upper right of each Clearspace page. Enter your search phrase and click **Search** to view a page from which you can filter your search results. If your search doesn't return the results you want, you can refine your search. On the Search page, click **More options** to choose the kinds of content you want to search, where the content you're searching for it, when it was created, and who created it.

Note: When you're on the Search page, the search box in the upper-right corner and the main search box behave slightly differently. The box in the upper-right corner invisibly appends an asterisk (*) so that it lists more results. This is a convenience feature.

Tags. When people assign tags and tag groups (page 23) to content you can use the tags to find the content again. Clearspace displays tags in a "tag cloud" where you can click a tag to see the content associated with it. For example, if you navigate to a space home page (click **Browse**, then click the name of the space), you'll see a tag cloud of popular tags (by default, on the lower left of the page). Notice that the tags listed there are in alphabetical order, but that they're displayed in different font sizes. A larger font means a tag that is assigned to more content.

How do I make something easier to find?

To help other people find the content that you create, you can do two important things:

- Put the content in a place where it's likely to be discovered. For example, be sure to choose the best space in which to create the content. (Note that after you create a document in one space, you won't be able to move it to another.)
- Apply tags and tag groups (page 23) to the content. Tags give other people a way to find things based on the ways your community thinks about them.

Don't forget that you can make yourself easier to find by adding information to your profile that other people might be interested in looking for. What are you good at? What do you know? Add these to your expertise list.

What are tags and tag groups?

Tags are like index keywords you and others assign to content (page 23) and use to look for content (page 22) . When you create or edit content, it's a good idea to make sure that the list of tags assigned to the content accurately describes what's in it. One way to do this is to ask yourself what tags you would use to look for this content if you were searching for it.

Tag groups collect tags so that you can find content by or assign all of the collected tags at once. For example, if you wanted to browse content via a tag group that collected the tags new_products and research, you'd get all content to which either tag had been assigned (rather than, say, any content to which *both* tags had been assigned).

As a general rule, always try to make sure that content you edit has a useful set of tags and tag groups assigned to it.

Note: When you have tags and tag groups whose names have more than one word, be sure to separate the words with something like an underscore character. If you use a space, you'll turn each word into a separate tag or tag group.

How do I apply tags and tag groups?

You can assign tags and tag groups (page 23) to the following content types when you're creating or editing them:

- A document (page 10) , such as a document or uploaded file (but not its comments).
- A blog (page 11) post (but not its comments).
- The initial post of a discussion (page 13) thread (but not its replies).

To assign tags, open the content for editing and scroll to the bottom of the page. Beneath the editing window, in the **Tag** box, type the tags you want to assign to the content you have open. Where possible, it's best to use tags that already exist. That way, you stand a better chance of assigning tags that people are already familiar with and that might be assigned to related content. The easiest way to apply existing tags is to just click the name of a tag in **Popular Tags** list; if you know the name of an existing tag (or if it's not listed), you can also just type it.

How do I get notified about changes to content?

To avoid having to keep checking back for changes to content in Clearspace, you can use feeds (such as RSS) and email notifications.

- Feeds (such as RSS) (page 24) give you a way to see information about content changes and additions all in one place. To view the list of changes you use what's called a "feed aggregator," or "feed reader." By subscribing to feeds (page 24) and using a reader you can view updates about content changes and additions through a single tool.
- With email notifications (page 25) , Clearspace sends you an email each time content you're interested in (that is, for which you've requested email notification) is changed or added. Requesting email notification is a way to get updates about content changes and additions in a more immediate way.

What are feeds (such as RSS)?

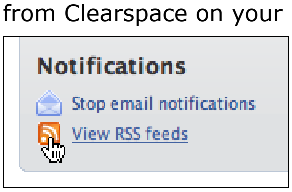
Feeds are a way for you to keep track of changes or additions to content you care about. (RSS is a popular feed type Clearspace supports; "RSS" stands for "Really Simple Syndication.") By "subscribing" to the feed for content in Clearspace, you're asking to have easy access to information about content changes or additions. A feed brings you a list of updates that you can view in a feed reader (also known as an aggregator). See How do I use the feeds I get from Clearspace? (page 24) for more info. Subscribing to feeds is an alternative to receiving email notifications (page 25) , in which an email is sent each time content is changed or added (although you can also do both). You might prefer email notifications if you want to receive updates in a more "passive" but immediate way.

You can subscribe to feeds (page 24) for content lists (such as a list of blogs, discussions, or documents you'd view in Clearspace), spaces, or for discussion threads.

How do I use the feeds I get from Clearspace?

To view feeds (page 24) you use a feed reader (also known as an aggregator). A reader is designed to collect information about content from the places whose feeds you've subscribed to. This could be as simple as using your web browser to collect the feeds (recent versions of Firefox, Internet Explorer, and Safari support this). To try this out, simply go to a Clearspace community (or piece of content) you want to receive updates on and click the feed icon there. There are also reader applications that are specifically designed to help you collect feeds.

Note: When you're adding Clearspace feed subscriptions to your feed reader, you might have to associate your Clearspace user name and password with the subscription. That's because the feed reader is getting information from Clearspace on your behalf. Clearspace needs to know it's not giving the information to just anyone!



For the feeds you've subscribed to, you'll typically get a list of summaries for content that has recently been added or changed. You can view the content itself or mark it in the list as having been "read."

To subscribe to the feed for content, you add the link URL for the feed to your feed aggregator. One way to get the URL is to click the feed icon when you're viewing content, then copy the URL out of the address bar at the top of your browser. You can also get the URL from a list of all the available feeds for a space by clicking **Subscribe via RSS** under **Actions**.

Note: Some browsers will display a feed symbol at the right side of the address bar (at the top, where the page URL is). If you click the symbol, you'll get a list of the feeds available. This is a good way to get feeds for documents, for example.

What are email notifications?

You can have Clearspace send you email when content you care about is added or changed. This is an alternative to feeds (page 24) , which require a feed aggregator (although you can use both feeds and email notifications, of course). Because an email is sent for each notification you request, you might prefer subscribing to feeds if you'd rather not get all the email.

To begin receiving email notifications, navigate to the area you care about — a space or document or blog, for example — and click **Receive Email Notifications** under **Actions**. To stop receiving email notifications, click **Stop Email Notifications** instead.

Managing Projects

What is a project?

With a project, you collect people's content in a way that focuses their work along a schedule toward a specific goal. A project is a great way to give collaborative work a context that's time-based and outcome-based.

Like a space, a project can contain discussions, blog posts, and documents. To these, projects add tasks. You can create tasks with titles and descriptions, assign them to people, set due dates, and mark them as complete. As with other content, you can assign tags to tasks, too.

You can add checkpoints to a project as a way to focus efforts to make sure your project is going as you intend. A checkpoint is merely a named place in the schedule, and it's often used as a point at which to take stock.

To help you manage your project's progress, Clearspace provides visual cues that snapshot the project. On a project's home page (which you can customize with widgets, as with other main pages in Clearspace), you'll get a checkpoint timeline that shows where your checkpoints are between the project's start and finish, and where the current date falls on the timeline. A project calendar captures task due dates and checkpoint dates in a traditional calendar style.

Note: By default, the project feature isn't included in Clearspace Community.

How do I create a project?

To create a project, navigate to a space's main page, then click **Create a Project** in the **Actions** list. Give the project a name and include descriptive details, then add a target date for completing the project. Click **Save** to enter your new project's home page.

How are projects different from spaces?

Projects are different from spaces in that projects can contain tasks and the time-based information you can use to track the project's progress. A project can also have checkpoints and an overarching outcome associated with it. In other words, a project provides the tools you need to focus collaboration along a schedule toward specific goals.

But the projects and spaces are similar. Like spaces, projects are containers for content people create, including blog posts, documents, and discussions. In one sense, a project is like a space that's inside another space. A project gets its permissions from the space containing it. In other words, people who can get into the containing space and view, edit, or create content there can do the same in projects inside the space. Note that posts to project blogs are visible outside the project in the way that posts to space blogs are visible outside the space.

How can I see project content outside the project?

You can only see content for a project outside the project if you're able to get into the project itself. If you are, then project content will show up in your searching and browsing, as with other content. You can also use widgets as windows on project content. For example, you could personalize your home page with the **Your Tasks** or **Your Projects** widgets so you can stay on top of the things assigned to you.

How can I copy task information between a project and another project management tool?

You can import and export tasks between a Clearspace project and other project management tools. To import task information, first export the information from your other project management tool, saving it as a comma-separated values (CSV) file. After exporting, go to your project in Clearspace and click **Import/Export Tasks** in the **Actions** list. On the **Import/Export Tasks** page, under **Import tasks from a CSV file**, click **Browse** to locate the CSV file you exported, then click **Upload File**. The next page shows the column titles for Clearspace tasks (such as "Description Field," "Assigned To Field," and "Due Date Field"), with dropdowns that list column titles found in the CSV you're uploading. Use the dropdowns to map a different CSV column title to each of the titles in the Clearspace project. This will determine where the information will go in the Clearspace project. The page displays a preview using information found in your CSV file. Click **Proceed** to accept the mappings. On the next page, you can clear check boxes for those items you don't want to import. You can click the edit link for a task to edit task information before you import it. Click **Import Selected Tasks** to import the information.

When you export task information from a Clearspace project, you begin by clicking **Import/Export Tasks**, then choose **Export** or **Choose Tasks**.