

## Advanced User Guide

# Kablinc<sup>®</sup> Vibe<sup>™</sup> OnPrem

### 3.1

June 28, 2011

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# About This Guide

The *Kablink Vibe OnPrem 3.1 Advanced User Guide* explains how to use advanced features of the Vibe product.

- ◆ Chapter 1, “Are You an Advanced Vibe User?,” on page 11
- ◆ Chapter 2, “Creating and Managing Workspaces,” on page 15
- ◆ Chapter 3, “Managing Folders,” on page 25
- ◆ Chapter 4, “Controlling Access,” on page 37
- ◆ Chapter 5, “Branding a Folder or Workspace,” on page 47
- ◆ Chapter 6, “Creating and Managing Landing Pages,” on page 49
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- ◆ Appendix B, “Using HTML Markup in Vibe OnPrem,” on page 179

## Audience

This guide is intended for all new Kablink Vibe users who want more information about advanced Vibe functionality.

## Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or go to [www.novell.com/documentation/feedback.html](http://www.novell.com/documentation/feedback.html) and enter your comments there.

## Documentation Updates

For the most recent version of this manual, visit the [Kablink Vibe OnPrem 3.1 Documentation Web site](http://www.novell.com/documentation/kablinkvibe_onprem31) ([http://www.novell.com/documentation/kablinkvibe\\_onprem31](http://www.novell.com/documentation/kablinkvibe_onprem31)).

## **Additional Documentation**

You can find more information in the Kablink Vibe documentation, which is accessible from the [Kablink Vibe OnPrem 3.1 Documentation Web site \(http://www.novell.com/documentation/kablinkvibe\\_onprem31\)](http://www.novell.com/documentation/kablinkvibe_onprem31).

To access the *Kablink Vibe OnPrem 3.1 User Guide* from within Vibe, click the *Help* icon (question mark).

# Are You an Advanced Vibe User?

# 1

Kablink Vibe OnPrem is an enterprise collaboration tool designed to increase individual productivity, team effectiveness, and organizational success by providing the right set of tools to the right people. Key Vibe features include Team workspaces, calendars, task lists, document management, discussion threads, wikis, blogs, RSS feeds, and workflows.

Vibe enables ordinary users to perform content-management functions. Because all Vibe users need to manage a personal workspace, and can also create team workspaces, all users have the potential to become “advanced Vibe users.”

Although all Vibe users have the ability to become advanced users, many users never have the need to progress beyond the basic Vibe functionality. This is because Vibe lends itself to two main groups: content consumers and content providers.

- ♦ [Section 1.1, “Content Consumers,” on page 11](#)
- ♦ [Section 1.2, “Content Providers,” on page 11](#)

## 1.1 Content Consumers

Content consumers use Kablink Vibe to get important information that pertains to them. They participate in team workspaces in order to better collaborate with colleagues and facilitate their work assignments. They identify subject-matter experts and search for important information.

Content consumers can learn how to accomplish these and other important tasks in the [Kablink Vibe OnPrem 3.1 User Guide](#)

## 1.2 Content Providers

Content providers use Kablink Vibe to manage teams by creating team workspaces and making information easily accessible through landing pages and other advanced Vibe features.

Advanced Vibe users might perform any of the following functions:

- ♦ **Create or manage workspaces and folders:** When you create your own workspace or folder, you are the owner of that workspace or folder. By default, you are also the owner of all sub-workspaces and sub-folders.

For example, suppose that your manager assigns you to lead an advertising campaign for a new product. Because accomplishing this assignment involves the combined efforts of various members of your team, you decide to create a new workspace dedicated to the new campaign.

For in-depth information, see [Chapter 2, “Creating and Managing Workspaces,” on page 15](#) and [Chapter 3, “Managing Folders,” on page 25](#).

- ♦ **Control user access to workspaces and folders:** As the owner of a workspace or folder, you are responsible for controlling which users have access rights, and deciding which rights are appropriate for which people.

For example, as the advertising campaign manager for a new product, you need to decide if Vibe users who are not members of your team are allowed to create entries in your team workspace, or whether non-team members should even be allowed to view the workspace.

Also, when new users join the team, it is your responsibility to grant them appropriate rights. For in-depth information, see [Chapter 4, “Controlling Access,” on page 37](#).

- ♦ **Create unique brands for workspaces and folders:** As the owner of a workspace or folder, you are responsible for creating a unique and attractive brand. Creating a unique brand is a good way to differentiate your workspace or folder from other places in the Vibe site.

For example, as the advertising campaign manager for a new product, you brand your team workspace with a graphic of the product logo, along with the new marketing slogan.

For in-depth information, see [Chapter 5, “Branding a Folder or Workspace,” on page 47](#).

- ♦ **Create landing pages:** As the owner of a workspace, you can present the most important information on the home page of the workspace. At the same time, you can change the look and feel of the home page. (You cannot create landing pages in personal workspaces.)

For example, as the advertising campaign manager for a new product, you create a landing page in the team workspace. In the landing page you display the current product shipment schedule, the latest news concerning the product, open tasks as they relate to your team members, and so forth.

For in-depth information, see [Chapter 6, “Creating and Managing Landing Pages,” on page 49](#).

- ♦ **Create custom workspace and folder views:** As the owner of a workspace or folder, you can create custom views that modify what is displayed on the home page of your workspace or folder. You can display uploaded files, remote applications, pictures, and more.

For example, as the advertising campaign manager for a new product, you can customize the home page of your team workspace to display pictures of the various marketing logo options for the product, as well as uploaded notes from team meetings.

For in-depth information, see [Chapter 7, “Creating Custom Workspace Views,” on page 77](#) and [Chapter 8, “Creating Custom Folder Views,” on page 87](#).

- ♦ **Create custom folder entry forms:** As the owner of a workspace or folder, you can create custom folder entry forms that users can fill in when they are making entries in the workspace or folder.

For example, as the advertising campaign manager for a new product, you decide to create a new folder called “Slogans.” Inside this folder, you create a new entry form that enables team members to easily submit their ideas for catchy slogans for the new product. The entry form contains a field for the team member to type his or her name, a field where they can type the slogan, a field where they can upload pertinent pictures, and so on.

For in-depth information, see [Chapter 9, “Designing Custom Folder Entry Forms,” on page 97](#).

- ♦ **Create and manage workflows:** As the owner of a workspace or folder, you can create workflows that automate otherwise time-consuming manual processes.

For example, as the advertising campaign manager for a new product, you notice that expense reporting is taking more time than you want. The current process is for members of your team to request an expense reimbursement from you, then for you to send the request to HR, who then transfers the request to Finance. To automate this process, you implement a workflow that sends you an e-mail notification requesting your approval when the request is submitted. When you give your approval, the workflow is automatically transferred to HR. If HR approves the request, then the workflow is transferred to Finance, where the reimbursement is addressed.

For in-depth information, see [Chapter 11, “Creating and Managing Workflows,” on page 113](#).

- ♦ **Manage remote applications:** As the owner of a workspace or folder, you can enable remote applications that have been set up by your Vibe administrator.

For in-depth information, see [Chapter 12, “Managing Remote Applications,”](#) on page 151.



# Creating and Managing Workspaces

# 2

Kablink Vibe OnPrem enables you to create and manage your workspaces in the following ways:

- ♦ [Section 2.1, “Creating and Managing a Team Workspace,” on page 15](#)
- ♦ [Section 2.2, “Creating and Managing a Discussions Workspace,” on page 16](#)
- ♦ [Section 2.3, “Creating and Managing a Basic Workspace,” on page 17](#)
- ♦ [Section 2.4, “Creating and Managing a Project Management Workspace,” on page 17](#)
- ♦ [Section 2.5, “Creating and Managing a Team Workspace Root Workspace,” on page 20](#)
- ♦ [Section 2.6, “Using Global Workspaces,” on page 21](#)
- ♦ [Section 2.7, “Creating Workspace Hierarchies,” on page 21](#)
- ♦ [Section 2.8, “Creating Custom Workspace Views,” on page 22](#)
- ♦ [Section 2.9, “General Workspace Management,” on page 23](#)

## 2.1 Creating and Managing a Team Workspace

Team workspaces are the key to helping you and your team accomplish tasks and meet objectives, together.

As the owner of a workspace, you are primarily responsible for workspace administration. You can create other containers for information (sub-workspaces and folders), adjust access control to determine who can do what in the workspace, and provide some initial content to assist team members with getting started.

For information about how to perform basic management tasks on a team workspace, such as creating the workspace, adding team members, and sending e-mail to team members, see [“Managing a Team Workspace”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

- ♦ [Section 2.1.1, “Allowing Visitors to Your Team Workspace,” on page 15](#)
- ♦ [Section 2.1.2, “Using Team Workspaces to Create Hierarchies,” on page 16](#)

### 2.1.1 Allowing Visitors to Your Team Workspace

By default, only team members can view and participate in the workspaces and folders contained in the team workspace. There might be times when you want to allow other people to visit your team workspace (which, by default, means that they can read entries and comment on them, but they cannot create entries).

To allow visitors to your team workspace:

- 1 Navigate to the team workspace where you want to allow visitors.
- 2 Click *Workspace > Access Control*.

Kablink Vibe displays the Configure Access Control page for the team workspace.

- 3 Ensure that the workspace is not inheriting its access control settings. Select the *no* radio button, then click *Apply*.
- 4 (Conditional) If *Visitor* is not already a column in the provided table, click *Add a Role > Visitor*:
- 5 On the left side of the table, click *Add a User*, then use the type-to-find functionality to select the name of the person you want to add as a visitor to the team workspace.
- 6 In that new user's row, select the check box in the *Visitor* column.
- 7 Repeat [Step 5](#) and [Step 6](#) until you have added all your visitors.
- 8 Click *Save Changes > Close*.

The people who now have the *Visitor* role can view your team workspace and add comments to existing entries. They cannot create new entries.

For more information on managing access control, see [Section 4.2, "Managing Access Control for Users and Groups,"](#) on page 39.

## 2.1.2 Using Team Workspaces to Create Hierarchies

Team workspaces in Vibe can be used to organize information inside of existing workspaces, creating different levels of hierarchy within a workspace.

You can also use other types of workspaces to create hierarchies. For information explaining the advantages and disadvantages of using each type of workspace, see [Section 2.7, "Creating Workspace Hierarchies,"](#) on page 21.

## 2.2 Creating and Managing a Discussions Workspace

The Discussions workspace can be the home page for a set of discussion forums. You can also use the Discussions workspace to house other types of folders.

Discussions workspaces can be particularly useful for site administrators, or other Kablink Vibe users who are responsible for creating the overall structure of the Vibe site. For example, you can use a Discussions workspace to organize a set of company-wide discussions on various topics. This can help organize your Vibe site, so users know where they should go if they are looking for a particular discussion forum.

- ♦ [Section 2.2.1, "Creating a Discussions Workspace,"](#) on page 16
- ♦ [Section 2.2.2, "Using Discussions Workspaces to Create Hierarchies,"](#) on page 17

### 2.2.1 Creating a Discussions Workspace

- 1 Navigate to the place in Vibe where you want to create the Discussions workspace.  
Depending on your rights, you might create this workspace at the Global level, if you are creating a company-wide Discussions workspace; or you might create this workspace in a lower-level workspace, if the Discussions workspace is intended for a smaller number of Vibe users.
- 2 Click *Workspace > New Workspace* in the Action toolbar.  
The New Workspace page is displayed.



- 3 In the *Workspace Title* field, specify a name for the Discussions workspace.
- 4 In the *Workspace* section, select *Discussions Workspace*.
- 5 In the *Workspace Folders* section, select *Discussion*.  
You can add additional Discussion folders after the workspace has been created.
- 6 Click *OK*.

## 2.2.2 Using Discussions Workspaces to Create Hierarchies

Discussions workspaces in Kablink Vibe can be used to organize information inside of existing workspaces, creating different levels of hierarchy within a workspace.

You can also use other types of workspaces to create hierarchies. For information explaining the advantages and disadvantages of using each type of workspace, see [Section 2.7, “Creating Workspace Hierarchies,”](#) on page 21.

## 2.3 Creating and Managing a Basic Workspace

Basic workspaces in Kablink Vibe can be used to organize information inside of existing workspaces, creating different levels of hierarchy within a workspace.

You can also use other types of workspaces to create hierarchies. For information explaining the advantages and disadvantages of using each type of workspace, see [Section 2.7, “Creating Workspace Hierarchies,”](#) on page 21.

To create a basic workspace:

- 1 Navigate to the place in Vibe where you want to create the basic workspace.
- 2 Click *Workspace > New Workspace* in the Action toolbar.  
The New Workspace page is displayed.
- 3 In the *Workspace Title* field, specify a name for the basic workspace.
- 4 In the *Workspace* section, select *Workspace*.
- 5 In the *Workspace Folders* section, select the folders that you want the new workspace to contain.  
You can add additional folders after the workspace has been created.
- 6 Click *OK*.

## 2.4 Creating and Managing a Project Management Workspace

Project Management workspaces include special accessories that help leaders track the progress of task completion for potentially large projects. Although Project Management workspaces can contain any type of folder, they are specifically designed to work in conjunction with Tasks and Milestones folders.

- ◆ [Section 2.4.1, “Creating a Project Management Workspace,”](#) on page 18
- ◆ [Section 2.4.2, “Managing a Project Management Workspace,”](#) on page 18
- ◆ [Section 2.4.3, “Understanding Tasks and Milestones,”](#) on page 18

## 2.4.1 Creating a Project Management Workspace

- 1 Navigate to the place in Kablink Vibe where you want to create the Project Management Workspace.
- 2 Click *Workspace > New Workspace* in the Action toolbar.  
The New Workspace page is displayed.
- 3 In the *Workspace Title* field, specify a name for the Project Management workspace.
- 4 In the *Workspace* section, select *Project Management Workspace*.
- 5 Click *OK*.

## 2.4.2 Managing a Project Management Workspace

After you create the Project Management workspace, notice that the workspace contains key folders, such as a Tasks folder, Milestones folder, Files folder, and so forth.

The home page of the Project Management workspace provides the following features that enable you to better manage your project:

**Task Summary Accessory:** This accessory lists all of the tasks that exist in the Tasks folder of your Project Management workspace.

To modify the information in this accessory, navigate to the Tasks folder of this Project Management workspace. For information about Tasks folders, see “[Working with Tasks Folders](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

**Project Information Box:** Displays the Status, Manager, and Due Date of the project.

To modify this information:

- 1 Click *Workspace > Edit Workspace* in the Action toolbar.
- 2 In the *Project Information Box* section, modify the *Manager*, *Status*, and *Due Date* fields as needed.
- 3 Click *OK*.

**Project Statistics:** Displays the current task and milestone statistics that are associated with the project.

## 2.4.3 Understanding Tasks and Milestones

Because tasks and milestones contribute important information to your Project Management workspace, it is important that you understand how they work.

- ♦ “[Understanding Tasks](#)” on page 18
- ♦ “[Understanding Milestones](#)” on page 19

### Understanding Tasks

Tasks folders keep track of the progress made in completing work assignments. For information about Tasks folders, see “[Working with Tasks Folders](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

## Understanding Milestones

The Milestones folder contains the various milestones for a project. Each milestone entry has specific Tasks folders that are associated with the milestone. When all of the tasks in the Tasks folders are complete, you can mark the milestone that is associated with those tasks as completed.

- ♦ [“Creating a Milestone” on page 19](#)
- ♦ [“Using the Milestones Folder” on page 19](#)
- ♦ [“Modifying a Milestone” on page 20](#)

### Creating a Milestone

- 1 Navigate to the Milestones folder in your Project Management workspace.
- 2 Click *Add Milestone*.

The Milestone page is displayed.

- 3 Specify the following information:

**Title:** Provide a title for the milestone.

**Description:** Describe the milestone.

**Due Date:** Specify when the milestone is due.

**Responsible:** Specify the users who are responsible for completing the milestone.

**Responsible Groups:** Specify the groups who are responsible for completing the milestone.

**Responsible Teams:** Specify the teams who are responsible for completing the milestone.

**Send an E-Mail Notification to Responsibles:** Select this option if you want Vibe to send an e-mail notification and iCal task/appointment to all of the users, groups, or teams that you associate with the entry.

For more information on iCal functionality in Vibe, see [“Synchronizing Tasks and Calendars to a Desktop Application”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

**Status:** Use the drop-down list to specify a status for the milestone (Open, Reopen, Completed).

**Task Folders:** Use the tree to navigate to and select the Tasks folders that you want to associate with the milestone.

The tasks in these Tasks folders must be completed before the milestone can be marked as Completed.

**Attachments:** Attach any appropriate files.

**Subscribe to This Entry:** You can configure Vibe to send you notifications when activity takes place in this entry. For more information, see [“Subscribing to a Folder or Entry”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

**Send E-Mail When Entry is Submitted:** To ensure that certain co-workers are aware of your entry, you can send them an e-mail directly from Vibe, notifying them that an entry has been created. For more information, see [“Filling Out the Send E-Mail Page”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

### Using the Milestones Folder

The Milestones folder contains the following columns that contain information about each milestone:

**Name:** Displays the name of the milestone.

**Responsible:** Displays the people who are responsible for the milestone.

**Tasks:** Displays the Tasks folders that are associated with the milestone.

Mouse over the colors in the bar chart, and Vibe explains the value (needs action, in process, completed).

**Status:** Displays the status of the milestone.

**Due date:** Displays the due date of the milestone.

### Modifying a Milestone

- 1 In the Milestones folder, click the milestone name in the *Name* column.  
The milestone entry is displayed.
- 2 In the Entry toolbar, click *Modify*.  
The Milestone page is displayed.
- 3 Make any modifications, then click *OK*.  
You might need to refresh the page for your changes to be displayed.

## 2.5 Creating and Managing a Team Workspace Root Workspace

A Team Workspace Root workspace is designed to contain multiple team workspaces. Use this type of workspace if you want to create additional team workspaces as sub-workspaces to this workspace. When users with appropriate rights view this workspace, they can easily create a new team workspace by clicking the *Add a Team Workspace* button, as described in “[Creating a Highly Visible Team Workspace](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*. The *Add a Team Workspace* button is not displayed in regular team workspaces.

You can control who has access to create workspaces in Team Workspace Root workspaces by modifying the access controls, as described in [Chapter 4, “Controlling Access,” on page 37](#).

For more information on organizing team workspaces for a Kablink Vibe site, see “[Organizing Team Workspaces](#)” in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

To create a Team Workspace Root workspace:

- 1 Navigate to the location where you want to create the Team Workspace Root workspace.
- 2 Create a regular team workspace, as described in “[Creating a Team Workspace inside of an Existing Team Workspace](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.
- 3 Navigate to the workspace that you just created in [Step 2](#).
- 4 Click *Workspace > Configure* in the Action toolbar.  
The Configure Default Settings page is displayed.
- 5 In the *Default View* section, select *Team Workspace Root*.
- 6 Click *Apply > Close*.

## 2.6 Using Global Workspaces

Global workspaces contain information beyond the scope of teamwork that might be of interest broadly across your organization.

Global workspaces can be created only by Kablink Vibe administrators. For more information on Global workspaces, see “[Creating Global Workspaces](#)” in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

## 2.7 Creating Workspace Hierarchies

Creating hierarchies in Kablink Vibe is a powerful way to organize workspaces in a meaningful way. Hierarchies can make information easier to find and increase effectiveness across the Vibe site.

Vibe provides three types of workspaces that you can use to create hierarchies within existing workspaces. Each type of workspace has its advantages and disadvantages for creating workspace hierarchies. Depending on your objectives and your environment, you might want to use any of the following types of workspaces:

- ◆ [Section 2.7.1, “Discussions Workspaces,” on page 21](#)
- ◆ [Section 2.7.2, “Basic Workspaces,” on page 22](#)
- ◆ [Section 2.7.3, “Team Workspaces,” on page 22](#)

### 2.7.1 Discussions Workspaces

If you don’t anticipate your workspace having hundreds or thousands of sub-folders, Discussions workspaces are recommended over basic workspaces and team workspaces.

The following sections describe the advantages and disadvantages of using a Discussions workspace to create hierarchies within existing workspaces:

- ◆ [“Advantages” on page 21](#)
- ◆ [“Disadvantages” on page 21](#)

#### Advantages

- ◆ Retains the access control rights of higher-level (parent) workspaces by default
- ◆ Lists sub-folders and sub-workspaces on the workspace home page (and displays how many items are in each folder)

#### Disadvantages

- ◆ Does not scale well (if you have hundreds or thousands of sub-folders, you should use a basic workspace to improve performance)

## 2.7.2 Basic Workspaces

The following sections describe the advantages and disadvantages of using a basic workspace to create hierarchies within existing workspaces:

- ♦ [“Advantages” on page 22](#)
- ♦ [“Disadvantages” on page 22](#)

### Advantages

- ♦ Retains the access control rights of higher-level (parent) workspaces by default
- ♦ Scales well (because basic workspaces do not list sub-folders and sub-workspaces on the workspace home page)

### Disadvantages

- ♦ Does not list sub-folders and sub-workspaces on the workspace home page

## 2.7.3 Team Workspaces

The following sections describe the advantages and disadvantages of using a Team workspace to create hierarchies within existing workspaces:

- ♦ [“Advantages” on page 22](#)
- ♦ [“Disadvantages” on page 22](#)

### Advantages

- ♦ Lists sub-folders and sub-workspaces on the workspace home page (and displays how many items are in each folder)

### Disadvantages

- ♦ Does not retain the access control rights of higher-level (parent) workspaces by default
- ♦ Does not scale well (if you have hundreds or thousands of sub-folders, you should use a basic workspace to improve performance)

## 2.8 Creating Custom Workspace Views

Kablink Vibe enables you to create custom workspace views. Workspace views define what is displayed on the main page of your workspace. When you create custom workspace views, you can configure workspaces to display optional features such as remote applications, attachments, and more.

For information on how to create custom workspace views, see [Chapter 7, “Creating Custom Workspace Views,” on page 77](#).

## 2.9 General Workspace Management

If you have appropriate rights, you can perform various types of management functions on a workspace, such as copying the workspace to another location, moving the workspace, adding folders to the workspace, deleting the workspace, and so forth.

For information on how to perform these and other types of management tasks, see “[General Workspace Management](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.





Kablink Vibe OnPrem enables you to manage your folders in the following ways:

- ♦ [Section 3.1, “Managing Folder Views,” on page 25](#)
- ♦ [Section 3.2, “Working with Folder Entry Types,” on page 26](#)
- ♦ [Section 3.3, “Enabling Folders to Receive Entries through E-Mail,” on page 28](#)
- ♦ [Section 3.4, “Setting Up a Folder or External E-Mail Address to Receive All Sent E-Mail Messages,” on page 30](#)
- ♦ [Section 3.5, “Configuring Folders to Send E-Mail Notifications to Other Users,” on page 31](#)
- ♦ [Section 3.6, “Setting Up and Using WebDAV,” on page 32](#)
- ♦ [Section 3.7, “Viewing Vibe Folders as RSS or Atom Feeds,” on page 35](#)
- ♦ [Section 3.8, “Applying Landing Page Elements to a Folder,” on page 35](#)

## 3.1 Managing Folder Views

Kablink Vibe enables you to change the way you and other users view your folder. You can change the default view, or allow multiple views.

For example, you might have a Tasks folder where the start date and end date are particularly important. You can configure your Tasks folder to be displayed in a Calendar folder view to place emphasis on the start and end dates of tasks. You can make this view the default view, or allow users to toggle between alternate folder views that you pre-enable.

- ♦ [Section 3.1.1, “Changing the Default Folder View,” on page 25](#)
- ♦ [Section 3.1.2, “Enabling Alternate Folder Views,” on page 26](#)

### 3.1.1 Changing the Default Folder View

Vibe enables you to change the default view of folders for which you have appropriate rights. This can be an existing folder view or a custom folder view that you created. For information about how to create a custom folder view, see [Chapter 8, “Creating Custom Folder Views,” on page 87](#).

- ♦ [“Enabling Views to Be Used as the Default View” on page 25](#)
- ♦ [“Selecting a New Default Folder View” on page 26](#)

#### Enabling Views to Be Used as the Default View

Before you can set a view as the default folder view, you need to enable that view.

- 1 Navigate to the folder where you want to change the default view.
- 2 Click *Folder > Configure* in the Action toolbar.  
The Configure Default Settings page is launched.
- 3 In the *Allowed Views* section, select the view whose look best presents your folder list or workspace.

- 4 Click *Apply*.

The folder view has now been added to the *Default View* section, and can be chosen as the default view, as described in [“Selecting a New Default Folder View” on page 26](#).

### Selecting a New Default Folder View

- 1 In the Configure Default Settings page, in the *Default View* section, select the folder view that you enabled in [“Enabling Views to Be Used as the Default View” on page 25](#).
- 2 Click *Apply* > *Close*.

## 3.1.2 Enabling Alternate Folder Views

Because only folder owners have rights to set the default view of a folder, Vibe enables folder owners to select alternate views that external users of the folder are allowed to use, if they are not satisfied with the default view, or feel more comfortable using another view.

- 1 Navigate to the folder where you want to enable alternate views.
- 2 Click *Folder* > *Configure* in the Action toolbar.  
The Configure Default Settings page is displayed.
- 3 In the *Allowed Views* section, select all of the views that you want to enable as alternate folder views.
- 4 Click *Apply* > *Close*.

Users can now view the folder in an alternate view.

- 1 Click *Folder* > *Folder Options* in the Action toolbar.  
The Folder Options dialog box is displayed.
- 2 In the *View Options* section, select the desired alternate view, then click *OK*.

## 3.2 Working with Folder Entry Types

- ♦ [Section 3.2.1, “Enabling Alternate Folder Entry Types,” on page 26](#)
- ♦ [Section 3.2.2, “Changing the Definitions for Existing Folders and Folder Entries,” on page 27](#)

### 3.2.1 Enabling Alternate Folder Entry Types

You can select the types of entries that you want to allow users to create in a certain folder. You can configure your folder to allow alternate entry types, or you can change the current default entry type. If you enable multiple entry types, users who submit entries into this folder can choose which type of entry they want to add, such as a task entry, calendar entry, and so forth.

- 1 Navigate to the folder where you want to enable alternate entry types.
- 2 Click *Folder* > *Configure* in the Action toolbar.  
The Configure Default Settings page is displayed.
- 3 In the *Default Entry Types* section, select the entry types that you want to allow users to create in the folder.
- 4 Click *Apply* > *Close*.

If you enable additional entry types, users who submit entries into this folder can click *New* in the Folder Entry toolbar, then use the drop-down list to choose the type of entry they want to add, depending on which types of entries you enabled on the folder.

Site administrators and folder owners can use the Form and View Designers functionality to create new entry types (custom forms), which then appear in this list. (When folder owners create new entry types, those entry types are listed in the *Local Definitions* section of this list.)

For more information on how to create custom entry types, see [Chapter 9, “Designing Custom Folder Entry Forms,”](#) on page 97.

## 3.2.2 Changing the Definitions for Existing Folders and Folder Entries

You can simultaneously change the definitions for folders and folder entries that have already been created. You can change all sub-folders to match the parent folder, and you can change all entries within a given folder to be of a specific entry type.

This feature must first be enabled by your Kablink Vibe administrator. If it is not enabled, it is not visible. For information on how to enable this feature, see “[Enabling Folder Administrators to Apply Definition Settings to Sub-Folders and Entries](#)” in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

- ♦ [“Applying Definition Settings to All Sub-Folders”](#) on page 27
- ♦ [“Applying Definition Settings to Existing Entries”](#) on page 27

### Applying Definition Settings to All Sub-Folders

You can apply the folder definition settings of a parent folder to all sub-folders. For example, if you have a Discussions folder that contains sub-folders, but not all of the sub-folders are Discussions folders, you can simultaneously convert all the sub-folders to be displayed as Discussions folders.

- 1 Navigate to the folder where you want to apply entry definition types to folders or entries that have already been created.
- 2 Click *Folder > Configure* in the Action toolbar.  
The Configure Default Settings page is displayed.
- 3 In the *Recursively apply* section, select *Change contained folders to inherit this folder’s definitions*.
- 4 Click *Apply > Close*.

All definition settings on the Configure Default Settings page are applied to all sub-folders.

### Applying Definition Settings to Existing Entries

You can convert all the entries that are contained within a specific folder to be of a single entry type. For example, a user might begin a discussion entry in a Discussion folder, then move the entry to the Tasks folder after it is decided that something needs to be done in order to resolve the discussion. After the discussion entry is added to the Tasks folder, the entry can be converted to a task entry.

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**IMPORTANT:** Changing entry definition settings as described in this section changes all entries within the folder and all sub-folders to be the same entry type. You should not perform the steps in this section if you want your folder and sub-folders to contain multiple types of folder entries, as described in [Section 3.2.1, “Enabling Alternate Folder Entry Types,”](#) on page 26.

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To make all folder entries the same within a specific folder:

- 1 Navigate to the folder where you want to apply entry definition types to folders or entries that have already been created.
- 2 Click *Folder > Configure* in the action toolbar.  
The Configure Default Settings page is displayed.
- 3 In the *Recursively apply* section, select *Change contained folders to inherit this folder’s definitions*, then select *Change contained entries to be of the following entry type*.
- 4 In the drop-down list, select the entry type that you want to apply to all existing entries in the folder.  
To add entry types to this drop-down list, select the entry types in the *Default Entry Types* section, then click *Apply*.
- 5 Click *Apply > Close*.

## 3.3 Enabling Folders to Receive Entries through E-Mail

Kablink Vibe enables you to e-mail entries into folders. This is useful if you don’t have access to the Vibe site and still want to create an entry. You can also send text messages into folders, so, you can still capture thoughts and contribute to conversations when you don’t have access to a computer or the Internet.

To enable folders to receive entries via e-mail, complete the following sections:

- ♦ [Section 3.3.1, “Enabling and Configuring the Inbound E-Mail Server,”](#) on page 28
- ♦ [Section 3.3.2, “Enabling Incoming E-Mail for the Vibe Site,”](#) on page 28
- ♦ [Section 3.3.3, “Enabling E-Mail Posting with a Simple URL,”](#) on page 29
- ♦ [Section 3.3.4, “Defining Who Has Access to E-Mail Entries,”](#) on page 29

### 3.3.1 Enabling and Configuring the Inbound E-Mail Server

The Vibe administrator should have enabled and configured the inbound e-mail server during the Vibe installation, as described in “[Enabling Inbound E-Mail](#)” in the *Kablink Vibe OnPrem 3.1 Installation Guide*.

For information about enabling and configuring inbound e-mail after the Vibe installation, see “[Reconfiguring the Vibe Site](#)” in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

### 3.3.2 Enabling Incoming E-Mail for the Vibe Site

For folders to be able to receive entries via e-mail, Vibe administrators need to enable the Vibe site to allow incoming e-mail.

For information on how to enable Vibe to allow incoming e-mail, see “[Disabling/Enabling Inbound E-Mail Postings](#)” in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

### 3.3.3 Enabling E-Mail Posting with a Simple URL

When you define a simple URL for a folder, Vibe creates a URL that enables you to quickly navigate to the folder, and also creates a corresponding e-mail address that users of the folder can e-mail to.

- 1 Navigate to the folder where you want to define the URL.
- 2 Click *Folder > Configure* in the Action toolbar.
- 3 In the *Define a simple URL for this folder or workspace* section, specify the URL that you want to use to reference the folder in the *Define URL* field.
- 4 Click *Add*.
- 5 Select *Allow e-mail posts to this folder via the following addresses*.
- 6 Click *Apply*, then click *Close*.

You can now make entries to the folder by e-mail or by text-messaging your entry to the e-mail address that you created, as described in “[Adding Entries to a Folder Via E-Mail](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

### 3.3.4 Defining Who Has Access to E-Mail Entries

By default, only users with rights to create entries in a particular folder can e-mail entries into that folder.

Vibe enables you to view who has rights to create entries in a folder, grant rights to other Vibe users, or configure the folder to allow all users to create entries by e-mailing into it.

- ♦ “[Viewing Who Has Rights](#)” on page 29
- ♦ “[Granting Rights to Other Vibe Users](#)” on page 29
- ♦ “[Setting Up a Folder That All Users Can Send E-Mail To](#)” on page 30

#### Viewing Who Has Rights

- 1 Navigate to the folder where you want to view who currently has rights to create entries in the folder.
- 2 Click *View > Who Has Access* in the Action toolbar.
- 3 In the provided table, the *Create Entries* section lists all of the users who have rights to create entries in the folder.

These are the users who have rights to e-mail entries into the folder.

#### Granting Rights to Other Vibe Users

You can grant other Vibe users rights to create entries in a folder.

For information on how to do this, see [Section 4.2, “Managing Access Control for Users and Groups,”](#) on page 39.

## Setting Up a Folder That All Users Can Send E-Mail To

You can enable your Vibe folder to receive e-mail entries from all users, regardless of whether they have access to create entries in the folder or not.

This enables e-mail entries to be submitted by anybody, inside or outside of the Vibe system. If you are worried about receiving spam messages in your folder, do not set up your folder to accept e-mail entries in the way described in this section.

- 1 Navigate to the folder where you want to enable all users to create entries via e-mail.
- 2 Click *Folder > Access Control* in the Action toolbar.
- 3 Ensure that *No* is selected in the *Inherit Role Membership* section, then click *Apply*.
- 4 In the table, click *Add a User*.
- 5 In the provided field, use the type-to-find functionality and specify *E-mail Posting Agent*.
- 6 In the *E-mail Posting Agent* row, select the check box in the *Participant* column.
- 7 Click *Save Changes > Close*.

Now all users can create entries in this folder via e-mail, using the e-mail address that you created in [Section 3.3.3, “Enabling E-Mail Posting with a Simple URL,” on page 29](#).

## 3.4 Setting Up a Folder or External E-Mail Address to Receive All Sent E-Mail Messages

Like a personal e-mail Outbox for the Vibe site, you can configure a folder or any e-mail address to receive all e-mail messages that you personally send from the Vibe site. This can help you better track your activity.

Vibe administrators might need to enable this functionality, as described in [“Enabling Users to Configure a Folder or External E-Mail Address to Receive Sent E-Mails”](#) in [“Managing E-Mail Configuration”](#) in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

Actions that cause e-mail messages to be sent from the Vibe site and to be saved in the Vibe folder that you designate are:

- ♦ Using the *E-Mail Team* and *E-Mail Contributors* options, as described in [“Informing Others about a Folder or Workspace”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.
- ♦ Using the *Share this Entry* option, as described in [“Sharing an Entry”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.
- ♦ Using the *Send E-Mail When Entry is Submitted* option, as described in the [“Sending an E-Mail about an Entry”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.
- ♦ Filling in the *Announcement* field when creating or editing a team workspace, as described in [“Creating a New Workspace”](#) and [“Sending E-Mail to Team Members and Announcing the Workspace after Its Creation”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

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**NOTE:** Certain types of e-mail messages that do not require you to personally add text, such as setting digest notifications or workflow notifications, are not saved to the folder that you designate.

---

To set up a folder or external e-mail address to receive all e-mail messages that you send from the Vibe site:

- 1 Create a new folder in the workspace where you want the folder to reside.  
For information on how to create a folder, see “[Creating a New Folder](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.
- 2 Define a simple URL for the folder, and allow e-mails to be sent to the folder.  
For information on how to define a URL for a folder and allow e-mailing into it, see [Section 3.3.3, “Enabling E-Mail Posting with a Simple URL,”](#) on page 29.
- 3 Navigate to your user profile page by clicking *My Workspace > Profile*.  
The Profile page is displayed.
- 4 Click *Edit*.
- 5 In the *BCC Email Address* field, specify the e-mail address of the folder or external e-mail address.  
If the *BCC Email Address* field does not exist, contact your Vibe administrator.  
The folder e-mail address was created when you defined a simple URL for the folder and allowed e-mail posting into the folder, as described in [Step 2](#). It is displayed on the Configure Default Settings page.
- 6 Click *OK*.

## 3.5 Configuring Folders to Send E-Mail Notifications to Other Users

As a folder owner, you can configure Kablink Vibe to send other users e-mail notifications, in order to inform them of any activity in the folder and any sub-folders of the folder. However, a user’s individual settings override or cancel notifications established by folder owners.

You cannot directly configure a sub-folder to send e-mail notifications; instead, you must configure the parent folder.

- 1 Navigate to the folder from where you want to send the e-mail notifications.
- 2 Click *Folder > E-Mail Settings* in the Action toolbar.  
The E-Mail Settings page is displayed.
- 3 In the *Select the Type of E-Mail Notification* section, select the type of e-mail notification that you want to send.
  - ♦ **Digest:** Vibe sends one message that summarizes all of the activity in the folder and its sub-folders (available for folders only). Vibe sends digest notifications at a schedule established by your site administrator.  
As a folder owner, you can set your own schedule for digest notifications. For more information, see [Step 5](#).
  - ♦ **Individual Messages (with Attachments):** Vibe sends one message for every new or changed entry, and messages include attached files. Vibe sends all types of individual notifications every five minutes.
  - ♦ **Individual Messages without Attachments:** Vibe sends one message for every new or changed entry. The e-mail messages do not include files that might be attached to the new or changed entries. Vibe sends all types of individual notifications every five minutes.

- ♦ **Message Suitable for Text Messaging:** Vibe sends a message suitable for viewing as a text message. The content of the message includes only the entry title and a link to the new or changed entry. Vibe sends all types of individual notifications every five minutes.
- 4 Specify the users who you want to receive the e-mail notifications.  
You can specify specific e-mail addresses, users, groups, or send the notifications to all team members.
  - 5 (Optional) Click *Set a Different Schedule for This Folder* if you want to set a digest schedule for the folder that is different from the digest schedule set by the site administrator.
  - 6 Click *Apply > Close*.

## 3.6 Setting Up and Using WebDAV

WebDAV is a standard collaborative editing and file management protocol. Kablink Vibe supports the use of WebDAV tools, and enables you to manage your Vibe files through WebDAV. Vibe utilizes WebDAV when editing attached files, and you can also set up WebDAV to view documents in a Vibe folder.

If you are using WebDAV on Windows 7, you or your Vibe administrator must ensure that your workstation meets all the necessary prerequisites in order to support WebDAV, as described in “[Configuring Vibe to Support WebDAV on Windows 7](#)” in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

If you cannot use WebDAV as described in the following sections, consult your Vibe administrator.

- ♦ [Section 3.6.1, “Using WebDAV to Edit Individual Files,” on page 32](#)
- ♦ [Section 3.6.2, “Using WebDAV on a Vibe Folder,” on page 33](#)

### 3.6.1 Using WebDAV to Edit Individual Files

You can use either of the following methods to edit files through WebDAV:

- ♦ [“Editing a File Directly from the Vibe Interface” on page 32](#)
- ♦ [“Using the WebDAV URL to Open the File in a Document Editor” on page 32](#)

#### Editing a File Directly from the Vibe Interface

When you use the Edit-in-Place functionality to edit a Vibe file, as described in “[Editing Files](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*, Vibe uses WebDAV to retrieve, lock, modify, and unlock the file. No special setup or configuration is needed in Vibe to use WebDAV in this way.

---

**NOTE:** Edit-in-Place functionality is not supported on Mac when you use Microsoft Office as your document editor. To use Edit-in-Place functionality on Mac, you must use OpenOffice as your document editor.

---

#### Using the WebDAV URL to Open the File in a Document Editor

You can obtain the WebDAV URL for individual files within Vibe, as described in “[Obtaining the WebDAV URL for a File](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.



After you have obtained the WebDAV URL for the file, you can specify the URL in a document editor such as Microsoft Office to open the file. Refer to the documentation for your specific document editor for instructions on how to accomplish this.

### 3.6.2 Using WebDAV on a Vibe Folder

When you use WebDAV on a Vibe folder, you can create a mapped drive to a Vibe folder, enabling users to browse and navigate the Vibe folder in a WebDAV interface. To manage your Vibe folders through a WebDAV interface, you must first configure the Vibe folder to support WebDAV, then create a mapped drive to the Vibe folder.

---

**NOTE:** Because of limitations with WebDAV on Mac, you cannot use WebDAV to view a Vibe folder in a Mac environment.

---

- ◆ [“Prerequisite for Windows XP and Windows Vista” on page 33](#)
- ◆ [“Configuring a Folder to Support WebDAV” on page 33](#)
- ◆ [“Viewing the Vibe Folder in Your Windows Environment” on page 34](#)
- ◆ [“Viewing the Vibe Folder in Your Linux Environment” on page 34](#)

#### Prerequisite for Windows XP and Windows Vista

When you use WebDAV on a Vibe folder on Windows XP or Windows Vista, you must first install the Software Update for Web Folders (KB907306). For information on how to perform this installation, see [“Software Update for Web Folders” \(http://www.microsoft.com/downloads/details.aspx?familyid=17c36612-632e-4c04-9382-987622ed1d64&displaylang=en\)](http://www.microsoft.com/downloads/details.aspx?familyid=17c36612-632e-4c04-9382-987622ed1d64&displaylang=en), and follow the provided instructions.

#### Configuring a Folder to Support WebDAV

In most types of Vibe folders, Vibe allows you to add multiple files with the same name to a single folder, if each file is added as a separate entry. (Files folders, however, require each file to have a unique name.)

When a folder is configured to support WebDAV, Vibe requires that each file added to the folder have a unique name. This is because when you view a folder through WebDAV, you see only the files that are within the folder and not the entries that contain each file.

To configure a folder to support WebDAV by requiring that all files uploaded to the folder have a unique name:

- 1 Navigate to the folder that you want to configure to support WebDAV.
- 2 Click *Folder > Edit Folder* in the Action toolbar.
- 3 Toward the bottom of the page, select *Require that all files uploaded into this folder have a unique name*.
- 4 Click *OK*.

For information about what users experience when they try to add a file to a WebDAV-enabled folder when the file has the same name as a file that has already been added to the folder, see [“Adding Files to a Files Folder and Other WebDAV-Enabled Folders”](#) in the .

## Viewing the Vibe Folder in Your Windows Environment

After your Vibe folder has been configured to support WebDAV, as described in [“Configuring a Folder to Support WebDAV” on page 33](#), you can view the Vibe folder in your Windows environment in either of the following ways:

- ♦ [“Creating a Mapped Drive to the Vibe Folder” on page 34](#)
- ♦ [“Adding a Vibe Folder as a Network Place” on page 34](#)

### Creating a Mapped Drive to the Vibe Folder

If you are using Windows XP as your client operating system, creating a mapped drive to the Vibe folder as described in this section does not work. Instead, add the Vibe folder as a network place, as described in [“Adding a Vibe Folder as a Network Place” on page 34](#).

- 1 Navigate to the folder where you want to create the mapped drive.
- 2 Click the link in the footer.
- 3 In the provided table, copy the WebDAV URL.
- 4 Map a drive to the folder.

You accomplish this by using the Map Network Drive feature for Windows.

- 5 Specify your Vibe credentials, then complete the setup process.

### Adding a Vibe Folder as a Network Place

If you are using Windows Vista as your client operating system, adding a Vibe folder as a network place as described in this section does not work. Instead, create a mapped drive to the Vibe folder, as described in [“Creating a Mapped Drive to the Vibe Folder” on page 34](#).

- 1 Navigate to the folder where you want to create the mapped drive.
- 2 Click the link in the footer.
- 3 In the provided table, copy the WebDAV URL.
- 4 Add the folder as a network place.

You accomplish this by using the My Network Places feature for Windows.

## Viewing the Vibe Folder in Your Linux Environment

After your Vibe folder has been configured to support WebDAV, as described in [“Configuring a Folder to Support WebDAV” on page 33](#), you can view the Vibe folder in your Linux environment.

- 1 Navigate to the folder where you want to create the mapped drive.
- 2 Click the link in the footer.
- 3 In the provided table, copy the WebDAV URL.
- 4 Use either Nautilus or Konqueror to access the Vibe folder.

For specific information on how to use Nautilus or Konqueror, consult your Linux documentation.

- 5 Specify your Vibe credentials, then complete the setup process.

## 3.7 Viewing Vibe Folders as RSS or Atom Feeds

RSS and Atom are Web formats used to publish frequently updated content such as blog entries, news headlines, or podcasts. RSS and Atom documents, which are often called feeds, contain either a summary or full content from an associated Web site. RSS and Atom make it possible for people to keep up with their favorite Web sites in an automated manner that's easier than checking the sites manually. RSS and Atom enable you to set up feeds to Kablink Vibe folders and view those feeds in one convenient location.

You can set up a Vibe folder to be accessed by an RSS or Atom reader. When you do this, the Vibe folder sends new or modified folder entries to your RSS or Atom reader. This is an easy way to stay informed on activity in a certain folder.

To set up a Vibe folder as an RSS or Atom feed:

- 1 Navigate to the folder that you want to set up as an RSS or Atom feed.
- 2 Click the Footer toolbar, located at the bottom of the folder page.
- 3 If you are setting up an RSS feed, select and copy the RSS URL in the *RSS URL* section in the provided table.

or

If you are setting up an Atom feed, select and copy the Atom URL in the *ATOM URL* section in the provided table.

- 4 In your RSS reader or Atom reader, create a new RSS or Atom feed, and paste the RSS URL or the Atom URL that you copied in [Step 3](#).

The folder is now set up as an RSS or Atom feed, and entries that are created in the folder appear in your RSS or Atom reader.

For information on using your Novell GroupWise client as an RSS reader, see “[RSS Feeds](#)” in the *GroupWise 8 Windows Client User Guide* [GroupWise 8 Windows Client Help](#). Or, see “[RSS Feeds](#)” in the *GroupWise 8 Linux/Mac Client User Guide* [GroupWise 8 Linux Client Help](#) [GroupWise 8 Mac Client Help](#).

## 3.8 Applying Landing Page Elements to a Folder

Landing pages and landing page elements can enhance the presentation and utility of your Kablink Vibe folders. You can set up a landing page on your folder, or you can simply apply some key landing page elements to the folder, such as hiding the Vibe masthead, the Navigation panel, and so forth.

- ♦ [Section 3.8.1, “Displaying a Landing Page on a Folder,” on page 35](#)
- ♦ [Section 3.8.2, “Applying Specific Landing Page Elements to a Folder,” on page 36](#)

### 3.8.1 Displaying a Landing Page on a Folder

Just as landing pages can enhance the presentation and utility of your Vibe workspaces, they can also enhance your Vibe folders.

For information on how you can create a landing page for a folder, see [Section 6.12, “Creating a Landing Page for a Folder,” on page 76](#).

## 3.8.2 Applying Specific Landing Page Elements to a Folder

You can leverage certain landing page elements in your Vibe folder without implementing an actual landing page.

For example, you might want to hide the Navigation panel from your folder in order to create more viewing room for users who view the folder.

You can apply the following landing page elements to a folder, without implementing an actual landing page:

- ◆ Hide the Vibe Masthead
- ◆ Hide the Navigation panel
- ◆ Hide the Footer toolbar

To make these modifications to your folder without implementing an actual landing page, you need to add the Landing Page element to your folder Form definition. For information on how to add the Landing Page element to your folder Form definition, see [Chapter 8, “Creating Custom Folder Views,”](#) on page 87.

# Controlling Access

# 4

If you are a Kablink Vibe OnPrem site administrator or a workspace and folder owner, it is your responsibility to keep your content safe and your content consumers happy, by making sure they have access to the files and folders they depend on. Access control in Vibe is how you accomplish this.

Workspace and folder owners are responsible for controlling user access in their workspaces or folders. Site administrators are responsible for controlling user access across the entire site.

- ♦ [Section 4.1, “Understanding Access Control,” on page 37](#)
- ♦ [Section 4.2, “Managing Access Control for Users and Groups,” on page 39](#)
- ♦ [Section 4.3, “Managing Access Control for Remote Applications,” on page 46](#)

## 4.1 Understanding Access Control

Access control is how you specify which users have the right to perform which tasks in which places.

Kablink Vibe uses role-based access control. By default, there are seven roles, and each role contains specific rights. If you want a particular user to have certain rights, you can assign that user to the appropriate role.

For example, a user who has been assigned to the Participant role in a workspace or folder can add comments or replies, create entries, delete his or her own entries, modify his or her own entries, and read entries in that folder or workspace.

The following sections help you better understand how access control works in Vibe.

- ♦ [Section 4.1.1, “Default Access Control Behavior in Workspaces,” on page 37](#)
- ♦ [Section 4.1.2, “Default User Rights,” on page 38](#)
- ♦ [Section 4.1.3, “Default Roles,” on page 38](#)
- ♦ [Section 4.1.4, “Default Users and Groups,” on page 39](#)

### 4.1.1 Default Access Control Behavior in Workspaces

By default, most places inherit the access settings of their parent. When you establish settings for a primary space, all sub-places automatically apply the same settings, saving administration time. However, unlike other types of workspaces, Team workspaces do not retain the access control settings of higher-level (parent) workspaces by default.

You can change the access control settings of a lower-level workspace and folder to be different from its parent workspace or folder. For information on how to do this, see [Section 4.2, “Managing Access Control for Users and Groups,” on page 39](#).

## 4.1.2 Default User Rights

By default, all Vibe users have rights to perform the following actions:

- ◆ Participate in any team workspaces in which they are a member (create folders and entries, make comments, etc.)
- ◆ Create team workspaces (by default, only members of a team can view and participate in team workspaces)
- ◆ Visit all personal workspaces (read entries and comment on them)
- ◆ Participate in all global workspaces and folders

## 4.1.3 Default Roles

Vibe includes default roles that you can assign to users and groups. The default roles for workspaces and folders are described in [“Understanding Default Roles for Workspaces and Folders” on page 38](#), and the default roles for entries are described in [“Understanding Default Roles for Entries” on page 39](#). These sections describe the function of each default role, but do not describe all of the rights associated with each role. For a complete list of rights, click the name of the role in the table on the Configure Access Control page. (In the Action toolbar, click *Workspace > Access Control* or *Folder > Access Control*.)

For a complete list of roles that site administrators can add, see [“Controlling User Access throughout the Vibe Site”](#) in the *Kablink Vibe OnPrem 3.1 Administration Guide*. For a detailed description of each right that can be associated with a given role, see [“Understanding the Various Rights for Roles”](#) in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

Vibe enables site administrators to create their own custom roles, as described in [“Defining a New Role”](#) in the *Kablink Vibe OnPrem 3.1 Administration Guide*. If you have a need for a custom role, consult your Vibe administrator.

By default, you can assign users to various roles in workspaces and folders, as well as in entries.

- ◆ [“Understanding Default Roles for Workspaces and Folders” on page 38](#)
- ◆ [“Understanding Default Roles for Entries” on page 39](#)

### Understanding Default Roles for Workspaces and Folders

Role	Description
Visitor	Has read-only and comment-only access.
Participant	Can create entries and modify those entries, plus perform tasks associated with the Visitor role.
Guest Participant	Can read entries, create entries, and add comments.
Team Member	Has all the rights of a Participant. In addition, can generate reports and manage global tags.
Workspace and Folder Administrator	Can create, modify, or delete workspaces or folders; moderate participation (modify or delete the entries of others); design entries and workflows; set entry-level access controls on entries of others; and can perform tasks associated with the Participant and Team Member role.

Role	Description
Workspace Creator	Can create sub-workspaces. In Team Workspace Root workspaces, this role allows users to create their own team workspaces.
Site Administrator	Has all rights associated with access control. Available only to Vibe administrators.

### Understanding Default Roles for Entries

Role	Description
Read	Can read the entry.
Read and Reply	Can read the entry and add comments or replies to the entry.
Write	Can read the entry, add comments or replies, and modify the entry.
Delete	Can read the entry, add comments or replies, modify, and delete the entry.
Change Access Controls	Can read the entry, add comments or replies, modify, and delete the entry. Can also modify the access control settings of the entry.

#### 4.1.4 Default Users and Groups

As you create users and groups in your Vibe site, you can assign default or custom access control roles to them. In addition to the users and groups that you create, Vibe includes four default users and groups to which you can assign roles. For information on how to do this, see [Section 4.2, “Managing Access Control for Users and Groups,”](#) on page 39.

Default User and Group	Description
Owner of a Workspace or Folder	The person who created the workspace, or the person assigned to be the owner of the workspace.
Team Members	The individuals who are designated as team members in a given place.  For information about how to add team members, see <a href="#">“Adding Additional Team Members to Your Workspace”</a> in the <i>Kablink Vibe OnPrem 3.1 User Guide</i> .
All Users	Every person registered within the Vibe site.
Site Administrator	The person who has rights to perform any task in any workspace or folder. Available only to Vibe administrators.

## 4.2 Managing Access Control for Users and Groups

When you have appropriate rights, you can control which users have access to workspaces, folders, and entries. Furthermore, you can regulate what actions they are allowed to perform. For example, you can allow a specific team to view a workspace, but only allow certain members of that team to create entries in the workspace.

You can control access to workspaces, folders, and entries.

- ◆ [Section 4.2.1, “Controlling Access to Workspaces and Folders,” on page 40](#)
- ◆ [Section 4.2.2, “Controlling Access to Entries,” on page 44](#)

## 4.2.1 Controlling Access to Workspaces and Folders

- ◆ [“Accessing the Configure Access Control Page” on page 40](#)
- ◆ [“Activating the Table” on page 41](#)
- ◆ [“Adding Roles to the Access Control Table” on page 42](#)
- ◆ [“Adding Users to the Access Control Table” on page 42](#)
- ◆ [“Adding Groups to the Access Control Table” on page 43](#)
- ◆ [“Assigning Roles to Users and Groups” on page 43](#)
- ◆ [“Adjusting Access Controls in Another Place” on page 43](#)
- ◆ [“Creating Access Controls for Remote Applications” on page 44](#)

### Accessing the Configure Access Control Page

Kablinc Vibe provides a table on the Configure Access Control page that enables you to make all of your needed access control modifications. You must use this table to perform any access control modifications in Vibe.

- 1 Navigate to the workspace or folder where you want to modify user access rights.
- 2 Click *Workspace > Access Control* in the Action toolbar if you want to change the access control settings for a workspace.

or

Click *Folder > Access Control* in the Action toolbar if you want to change the access control settings for a folder.



The Configure Access Control page is displayed.

Configure Access Control

**Configure Access Control** ?

Current Workspace: **Marketing**  
 Workspace Owner: **Anita Olivos** (*anoliv*) [edit]

[Home Workspace](#) // [Team Workspaces](#) // [Marketing](#)

This folder inherits its access control settings from its parent.

Inherit role membership from the parent folder or workspace?

yes  no

			Roles			
			Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
	Owner of Workspace or Folder		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Team Members		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Groups	Group Title	Group Name	Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
	All Users	allUsers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Users	User Title	User Id	Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
	--no users--					
Application Groups	Application Group Title	Application Group Name	Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
	--no application groups--					
Applications	Application Title	Application Name	Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
	--no applications--					

[Note: admin (admin) has been designated as the default site administrator with privileges to perform any task on any workspace or folder.]

### Activating the Table

Before you can make modifications to the table on the Configure Access Control page, you need to ensure that the folder or workspace does not inherit its access control settings from its parent folder or workspace:

- 1 In the Folder Inheritance section, select *no*, then click *Apply*.

This folder inherits its access control settings from its parent.

Inherit role membership from the parent folder or workspace?

yes  no

You can now make modifications to the table.

✓ designates the access control setting of the parent workspace

Add User Names from Clipboard			Add a Role ▾			
			Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
	Owner of Workspace or Folder		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓ <input checked="" type="checkbox"/>
	Team Members		<input type="checkbox"/>	<input type="checkbox"/>	✓ <input checked="" type="checkbox"/>	<input type="checkbox"/>
Add a Group ▾			Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
Group Title	Group Name					
All Users	allUsers		✓ <input checked="" type="checkbox"/>	✓ <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add a User ▾			Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
User Title	User Id					
--no users--						
Add an Application Group ▾			Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
Application Group Title	Application Group Name					
--no application groups--						
Add an Application ▾			Workspace Creator	Participant	Team Member	Workspace and Folder Administrator
Application Title	Application Name					
--no applications--						

Save Changes

[Note: admin (admin) has been designated as the default site administrator with privileges to perform any task on any workspace or folder.]

## Adding Roles to the Access Control Table

- 1 Click the *Add a Role* link at the top of the table.
- 2 From the drop-down list, select the role that you want to add.  
Vibe adds a new column to the table for the new role.
- 3 Assign the appropriate user or group to this role by selecting the check box in the user's or group's row, as described in [“Assigning Roles to Users and Groups” on page 43](#).  
For information on how to add a new user to the access control table, see [“Adding Users to the Access Control Table” on page 42](#).  
For information on how to add a new group to the access control table, see [“Adding Groups to the Access Control Table” on page 43](#).
- 4 Click *Save Changes*.

## Adding Users to the Access Control Table

You can individually add users to the Access Control table, or you can add them by using the Vibe clipboard.

- ♦ [“Adding Individual Users” on page 42](#)
- ♦ [“Adding Users from the Clipboard” on page 43](#)

### Adding Individual Users

- 1 Click the *Add a User* link in the left column of the table.
- 2 In the *Add a User* field, begin typing the name of the user that you want to add, then select that user from the provided list.  
Vibe adds a new row to the table for the new user.

- 3 Assign the user to the appropriate role by selecting the check box in the column of the user's row, as described in [“Assigning Roles to Users and Groups” on page 43](#).
- 4 Click *Save Changes*.

### Adding Users from the Clipboard

- 1 In the upper left corner of the Access Control table, click *Add User Names from Clipboard*.  
All of the users who are currently on your clipboard are added to the Access Control table.  
For more information on how to use the Vibe clipboard, see [“Using the Vibe Clipboard”](#) in the [Kablank Vibe OnPrem 3.1 User Guide](#).
- 2 Assign the users to the appropriate role by selecting the check box in the column of each user's row, as described in [“Assigning Roles to Users and Groups” on page 43](#).
- 3 Click *Save Changes*.

### Adding Groups to the Access Control Table

- 1 Click the *Add a Group* link in the left column of the table.
- 2 In the *Add a Group* field, begin typing the name of the group that you want to add, then select that group from the provided list.  
Vibe adds a new row to the table for the new group.
- 3 Assign the group to the appropriate role by selecting the check box in the column of the group's row, as described in [“Assigning Roles to Users and Groups” on page 43](#).
- 4 Click *Save Changes*.

### Assigning Roles to Users and Groups

A role is a set of privileges. When you assign a user or group to a role, that user or group automatically has all the rights associated with that role.

- 1 Ensure that the user or group and the role that you want to associate with the user or group are visible in the Access Control table.  
For information on how to add a role or a user or group to the table, see [“Adding Roles to the Access Control Table” on page 42](#), [“Adding Users to the Access Control Table” on page 42](#), and [“Adding Groups to the Access Control Table” on page 43](#).
- 2 In the row of the user or group, select the check box that is located in the role column that you want to assign to the user or group.
- 3 Click *Save Changes*.

If you want to unassign a role:

- 1 Deselect the appropriate check box, then click *Save Changes*.

### Adjusting Access Controls in Another Place

Vibe enables you to adjust the access control settings of any workspace or folder, directly from the Configure Access Control page.

- 1 In the workspace tree at the top of the Configure Access Control page, navigate to the place where you want to adjust the access controls.

- 2 Click the linked title of the place where you want to adjust the access controls.  
Vibe displays the Configure Access Control page for the page that you specified.

## Creating Access Controls for Remote Applications

Because not all remote applications can be completely trusted, it is often a good idea to limit the privileges of the remote application.

For information on how to do this by using access controls, see [Section 12.4, “Managing Access Controls for Remote Applications,” on page 155.](#)

### 4.2.2 Controlling Access to Entries

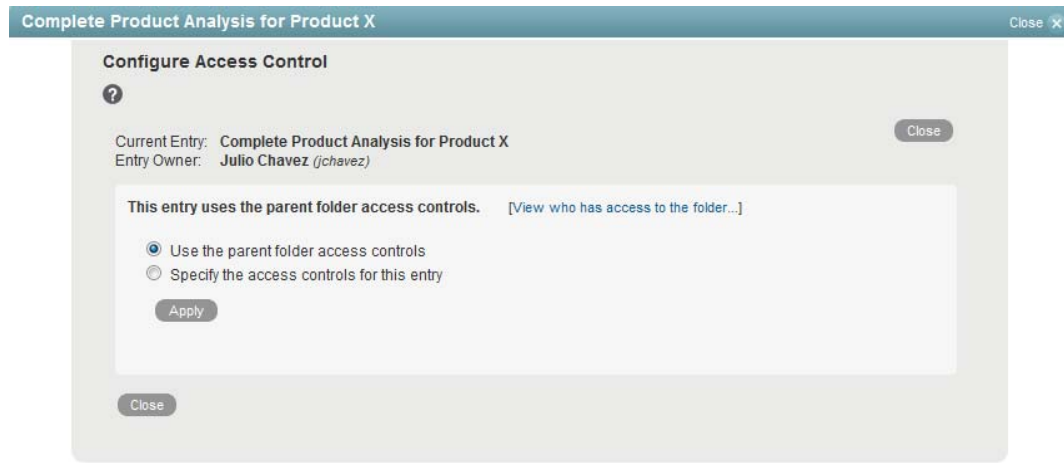
Vibe enables you to set access controls for an entry that differ from the access controls of the parent folder. You might want to do this if you have granted a group of users access to a folder, but only want a subset of that group to have access to see certain entries within the folder. Or, you might want to set access controls on a particular entry to make that entry visible to users who don't have access to the folder where the entry resides, as described in [“Exposing a Vibe Entry to a Wider Audience Than the Folder Access Controls Allow” on page 46.](#)

Before you can modify access controls for an entry, you need to ensure that the entry does not inherit its access control settings from the parent folder:

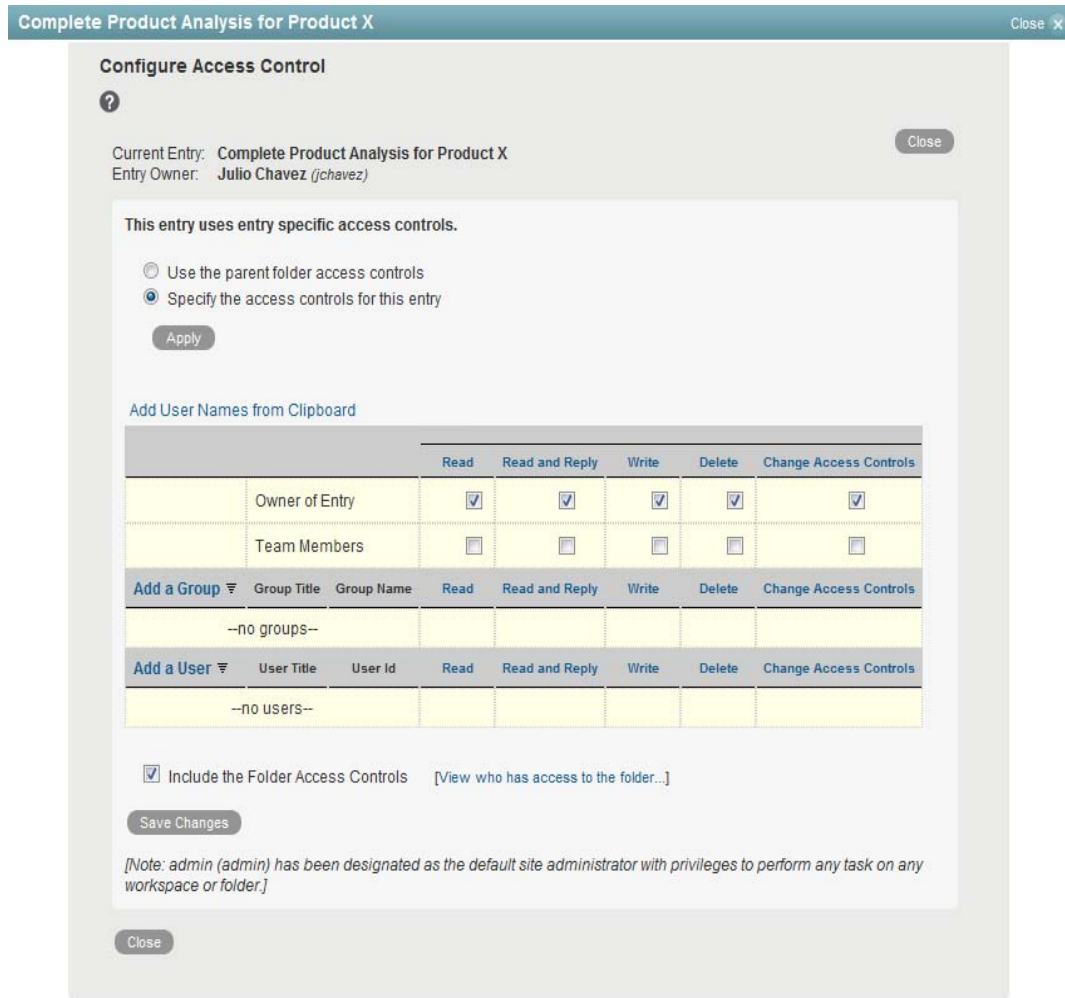
To set access controls on an entry:

- 1 Navigate to the entry where you want to modify user access rights.
- 2 Click *Actions > Access Control* in the Entry toolbar.

The Configure Access Control page is displayed.



- 3 To set access controls that differ from the access controls of the parent folder, select *Specify the access controls for this entry*, then click *Apply*.



**4** Use the table to modify user access to the entry.

You can assign various roles to team members, groups, or individual users.

For information about the roles that you can assign, see [“Understanding Default Roles for Entries” on page 39](#).

For information about how to add users and groups to the access control table, see [“Adding Users to the Access Control Table” on page 42](#) and [“Adding Groups to the Access Control Table” on page 43](#).

**5** (Optional) Select *Include the Folder Access Controls* if you want to extend the new entry-level access controls to include the access controls that are already in place for the folder. Selecting this option automatically grants users with the same access rights to the entry that they have to the folder.

Deselect *Include the Folder Access Controls* if you want the new entry-level access controls to override the folder-level access controls. If you deselect this option, you must use the entry-level access controls to specify each user or group that you want to have access to the entry. Users who have access to the folder that contains the entry but have not been granted access rights to the entry itself do not have access to the entry.

**6** Click *Save Changes* > *Close*.

## Exposing a Vibe Entry to a Wider Audience Than the Folder Access Controls Allow

You can expose a Vibe entry to make it visible to a wider audience than the folder where the entry resides. For example, if your folder is visible only to team members, the default access controls allow only team members to see all entries that are created in the folder. However, by deselecting *Include the Folder Access Controls*, you can enable a wider audience to view a specific entry. You might want to do this if the majority of content in a folder is sensitive and should be restricted to a limited audience, but you want to expose a specific entry to a larger audience.

For example, suppose that you are a member of a finance team that is responsible for the accounting of your company's quarterly earnings. All the information in your team's workspace is confidential. However, when it is time to announce the company's quarterly earnings, you create a Vibe entry that contains the earning results, and you modify the access controls of this specific entry to make the entry visible to all company employees.

To expose a Vibe entry to a wider audience than is currently allowed in the folder:

- 1 Modify the entry access controls as described in [Section 4.2.2, "Controlling Access to Entries,"](#) on page 44.

Ensure that you deselect *Include the Folder Access Controls*, as described in [Step 5](#) of this section.

---

**NOTE:** When you expose a Vibe entry to a wider audience than is currently allowed in the folder, users must perform a search in order to locate the entry, or they must have the entry shared with them. Users cannot locate the entry by navigating the Workspace tree as described in "[Navigating the Workspace Tree](#)" in the [Kablink Vibe OnPrem 3.1 User Guide](#).

---

## 4.3 Managing Access Control for Remote Applications

Because not all remote applications can be completely trusted, it is often a good idea to limit the privileges of the remote application.

For information on how to do this by using access controls, see [Section 12.4, "Managing Access Controls for Remote Applications,"](#) on page 155.

# Branding a Folder or Workspace

# 5

Branding a folder or workspace is a good way to make the folder or workspace more unique and identifiable. When you brand a folder or workspace, the brand is applied to all sub-workspaces and sub-folders. However, folder and workspace owners in lower-level folders and workspaces can override the higher-level brand settings by adding a workspace brand of their own. For example, the Global Workspaces folder can be branded with the company logo and slogan, while a team workspace at a lower level in the workspace tree can be branded with a logo for the product that the team is responsible for. Members of that team can then override the team brand by branding individual folders within the team workspace that they are responsible for.

Kablink Vibe OnPrem administrators can disable this functionality when they create a site-wide brand, as discussed in “[Creating a Site-Wide Brand](#)” in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

If you are unable to brand a folder or workspace as discussed in this section, contact your Vibe administrator.

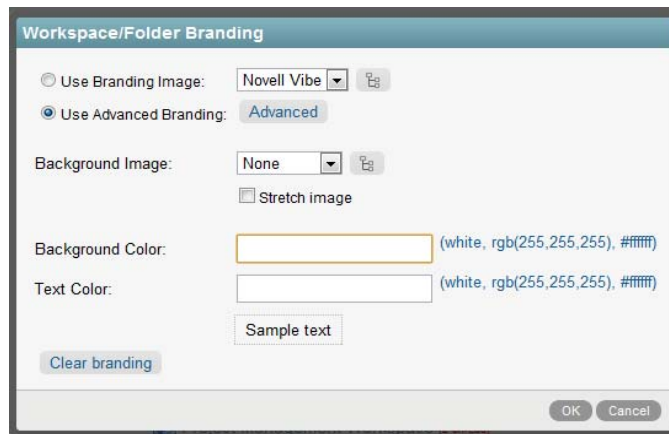
To brand a folder or workspace:

- 1 Navigate to the folder or workspace where you want to create the brand.
- 2 Click *Workspace > Brand Workspace* if you are branding a workspace.


or

Click *Folder > Brand Folder* if you are branding a folder.


The Workspace/Folder Branding dialog box is displayed.



- 3 Specify the following information to create your desired brand:

**Use Branding Image:** Select this option if you want to use the drop-down list to select an existing image, or click the *Browse* icon  to browse to an image on your computer’s file system.


**Use Advanced Branding:** Select this option, then click *Advanced* if you want to create a brand that includes advanced features, such as linking to another Vibe page or displaying a YouTube video.

You can add a YouTube video in your branding section by clicking the *Video* icon .

For more information about displaying YouTube videos in Vibe, see “[Displaying YouTube Videos in a Folder Entry](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

For more information about linking to another Vibe page, see “[Linking to a Folder or Folder Entry](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

If you add a URL to the advanced branding, the URL cannot contain the following parameter: `url_created_by_teaming`. If this parameter does exist, delete it before saving your brand.

**Background Image:** Click the *Browse* icon  to browse to an image on your computer’s file system. If you are branding a team workspace, you can use the provided drop-down list to select an image that is already attached to the workspace. (For information on how to attach an image to a team workspace, see “[Modifying a Workspace](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.)

This background image is displayed behind your regular branding.

**Stretch Image:** Stretches the image to occupy the entire branding area.

If you stretch your background image, the image overrides any background color that you have set.

**Background Color:** Adds a background color that occupies the entire branding area. To change the background color, click the color name to the right of this field, select the new color, then click *OK*.

If you added a background image and stretched the image, the background color is not displayed.

**Text Color:** Changes the text color of the workspace name in the upper-right corner of the branding area. To change the text color, click the color name to the right of this field, select the new color, then click *OK*.

**Clear branding:** Clears all your current branding selections.

#### 4 Click *OK*.

The folder or workspace now displays the brand that you created.



# Creating and Managing Landing Pages

# 6

Landing pages in Kablink Vibe OnPrem can benefit your workspaces and folders in two key ways:

- ♦ **Improved Customization:** Landing pages provide an excellent opportunity to put a custom, personal face on workspaces and folders in your Vibe site, while still providing the team-focused, collaborative functionality that Vibe affords.
- ♦ **Increased Retrievability:** Landing pages increase the accessibility and visibility of the information that is most critical to your team or organization. You can bring important entries or entire folders to the forefront of workspaces, ensuring that users access the information they need in a quick, efficient manner.

For example, a landing page for a city's public sector might look something like this:

*Welcome to the City of Plattsburg*

**Welcome to the Public Portal**

We customized this landing page using the landing page editor to make it have a user-friendly look and feel. Click on the links on the left and right navigation areas to find out how they could be utilized in a real government public portal. Also, refer to the *Public Portal* portion of the walkthrough to find out more about this public portal. Once you are ready, click *Intranet* on the left to continue this demo.

-Teaming Library

**Flower Princess from Last Year's Spring**

**Message from the Mayor**

I wish I could personally thank every one of you for the work you do! Our beautiful City has never been as great of a place to live in all the years I have lived here as it is right now. This is a direct result of all the hard work you put into making Plattsburg the best City to live in. Thank you!

It is an exciting time to be living in the City of Plattsburg. Our economy and population have been growing at a steady rate over the last few years and we expect it to continue. Crime rates and accident rates have never been lower! Businesses are thriving and housing prices are steadily increasing. The future looks bright for our City!

Sincerely,  
Mayor Dan Johnson

**First Aid Certification**

We are offering a free first aid certification course at our local fire station.

**Spring Festival**

Help us bring in the Spring season by participating in our Spring Festival. We will have plenty of activities for kids and adults!

**Clean the City Day**

Please participate in our city-wide "Clean the City Day" event. All you have to do is go outside and do something to make our beautiful City a little more beautiful.

- ◆ Section 6.1, “Enabling the Landing Page View for a Workspace,” on page 51
- ◆ Section 6.2, “Setting Up Your Landing Page,” on page 52
- ◆ Section 6.3, “Publishing Your Landing Page,” on page 67
- ◆ Section 6.4, “Modifying the Contents of Your Landing Page,” on page 67
- ◆ Section 6.5, “Reordering the Content of Your Landing Page,” on page 68
- ◆ Section 6.6, “Deleting Content from Your Landing Page,” on page 68
- ◆ Section 6.7, “Automatically Displaying the Newest Folder Entries on Your Landing Page,” on page 69
- ◆ Section 6.8, “Adding Accessories to Your Landing Page,” on page 71
- ◆ Section 6.9, “Enabling Graphics to Be Used on a Landing Page,” on page 73
- ◆ Section 6.10, “Displaying YouTube Videos on a Landing Page,” on page 74
- ◆ Section 6.11, “Creating a Landing Page for a Personal Workspace,” on page 75
- ◆ Section 6.12, “Creating a Landing Page for a Folder,” on page 76
- ◆ Section 6.13, “Downloading Existing Landing Pages,” on page 76

## 6.1 Enabling the Landing Page View for a Workspace

Before you can create the landing page, you need to enable the landing page view for the workspace.

Kablink Vibe includes a default workspace landing page view. The default landing page view contains a *Landing Page Layout* section, a *Description* section, a *Branding* section, an *Icon* section, and an *Attachments* section.

Or, you can create a custom landing page view for a workspace that contains only the sections that you choose. For information on how to create a custom landing page view for a workspace, see [Chapter 7, “Creating Custom Workspace Views,” on page 77](#).

You can enable the landing page view on an existing workspace, or when you are creating a workspace.

- ♦ [Section 6.1.1, “Enabling the Landing Page View on an Existing Workspace,” on page 51](#)
- ♦ [Section 6.1.2, “Enabling the Landing Page View on a Workspace You Are Creating,” on page 51](#)

### 6.1.1 Enabling the Landing Page View on an Existing Workspace

**1** Navigate to the workspace where you want to create the landing page.

You can create a landing page for a personal workspace only if your Vibe administrator has enabled you to do so. For more information, see [Section 6.11, “Creating a Landing Page for a Personal Workspace,” on page 75](#).

**2** Click *Workspace > Configure* in the Action toolbar.

The Configure Default Settings page is displayed

**3** In the *Default View* section, select *Landing Page*.

**4** Click *Apply > Close*.

What was previously displayed on the main page of the workspace is no longer displayed and the main page of the workspace is blank.

**5** Continue with [Section 6.2, “Setting Up Your Landing Page,” on page 52](#).

### 6.1.2 Enabling the Landing Page View on a Workspace You Are Creating

**1** Navigate to the workspace where you want to create the new workspace.

**2** Click *Workspace > New Workspace*.

The New Workspace page is displayed.

**3** In the *Workspace Title* field, specify a title for the workspace.

**4** In the *Workspace* section, select *Landing Page*.

**5** Finish creating the workspace, then click *OK*.

For more information on creating a workspace, see “[Creating a New Workspace](#)” in “[General Workspace Management](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

6 Continue with [Section 6.2, “Setting Up Your Landing Page,”](#) on page 52.

## 6.2 Setting Up Your Landing Page

After you enable a landing page as described in [Section 6.1, “Enabling the Landing Page View for a Workspace,”](#) on page 51, you need to set it up to display the desired layout options and content, as described in the following sections:

- ◆ [Section 6.2.1, “Choosing Layout Options for Your Landing Page,”](#) on page 52
- ◆ [Section 6.2.2, “Adding Content to Your Landing Page,”](#) on page 53
- ◆ [Section 6.2.3, “Configuring Landing Page Elements,”](#) on page 55

### 6.2.1 Choosing Layout Options for Your Landing Page

- 1 Navigate to the landing page that you created in [Section 6.1, “Enabling the Landing Page View for a Workspace,”](#) on page 51.
- 2 Click *Workspace > Edit Workspace* in the Action toolbar.

or

If you are creating a landing page for a folder, click *Folder > Edit Folder*.

The screenshot shows the configuration interface for a landing page. At the top, there is a teal header with the text "Marketing". Below this is a "Title" field containing the text "Marketing". Underneath the title field are two sections: "Landing Page Layout" and "Landing Page Style". The "Landing Page Layout" section has three checkboxes: "Hide the Masthead", "Hide the Navigation Panel", and "Hide the Footer", all of which are currently unchecked. The "Landing Page Style" section has two radio buttons: "Light" and "Dark", with "Dark" selected. Below these sections is a text instruction: "Drag and drop any of the elements onto the workspace layout area to design the landing page. Hover over each element for a description." At the bottom left, there is a vertical list of elements that can be dragged: "Table", "List", "Entry", "Folder", "Enhanced View", and "Graphic". To the right of this list is a large, empty workspace layout area.

- 3 In the *Landing Page Layout* section, below the workspace *Title* field, you can select from the following options to modify the display of your landing page:
  - ◆ **Hide the Masthead:** Select this option to hide the masthead (Navigation toolbar). This hides everything above the Action toolbar.
  - ◆ **Hide the Navigation Panel:** Select this option to hide the Navigation panel.
  - ◆ **Hide the Footer:** Select this option to hide the Footer toolbar.
- 4 In the *Landing Page Style* section you can select from the following options to modify the style of your landing page:
  - ◆ **Light:** No background shading is displayed on landing page elements.

- ♦ **Dark:** (Default) Displays a dark background on each element to provide contrast between the landing page elements.

5 Click *OK* to save the layout and style changes.

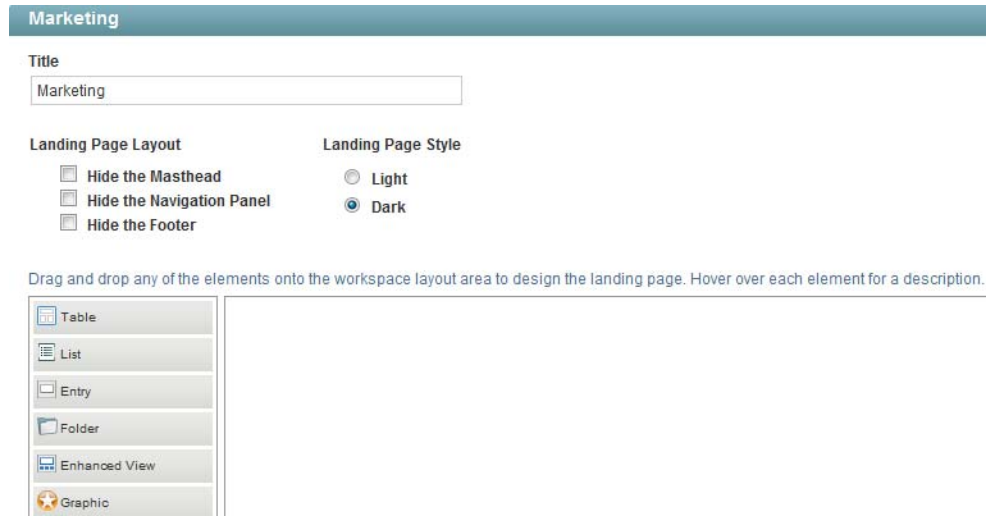
## 6.2.2 Adding Content to Your Landing Page

1 Navigate to the landing page that you created in [Section 6.1, “Enabling the Landing Page View for a Workspace,”](#) on page 51.

2 Click *Workspace > Edit Workspace* in the Action toolbar.

or

If you are creating a landing page for a folder, click *Folder > Edit Folder*.



3 In the *Landing Page Layout* section, in the content editor, use the element palette to select the landing page element that you want to display on your landing page.



You can add the following elements:

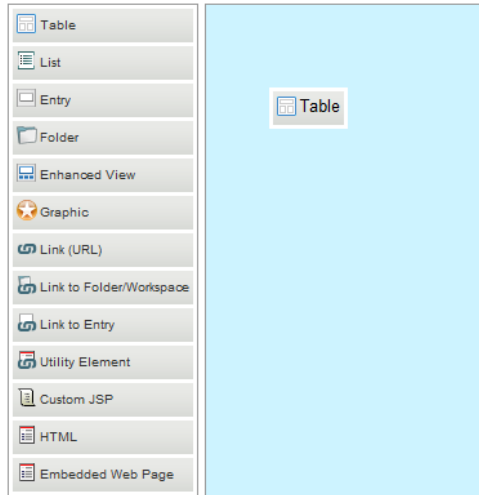
- ♦ **Table:** Creates a table with the number of columns that you specify. You can add other elements inside this table.
- ♦ **List:** Creates a list where you can add other elements.
- ♦ **Entry:** Enables you to reference an entry that has previously been created in Kablink Vibe.

The actual content of your landing page is created in entries. The landing page simply references entries that have already been created within Vibe.

When you add an entry to the landing page by using the Entry element, only the entry title and description can be displayed. If you want to display entry comments, add the [Enhanced View](#) element to the landing page.

- ♦ **Folder:** Enables you to reference a folder that has previously been created in Vibe. You can choose how many entries from the folder that you want to display on your landing page at any one time.
- ♦ **Enhanced View:** Enables you to display entries and folders in enhanced ways. The following options are available:
  - ♦ **Display an entry:** Displays the entry title, description, author, date, and the 10 most recent comments.
  - ♦ **Display a full entry:** Displays the entry with the full entry view, which includes the title, description, author, date, tabs (*Comments*, *Attachments*, *Entry History*, *Tags*), ratings, and so forth.
  - ♦ **Display recent entries:** Displays the most recent entries from the specified folder. Displays the title, description, author, date, and the 10 most recent comments for each entry.
  - ♦ **Display a list of recent entries:** Displays a list of the most recent entries from the specified folder. Displays the title, author, and date of the entry.
  - ♦ **Display a sorted list of recent entries:** Displays a list in alphabetical order of the most recent entries from the specified folder. Displays the title, author, and date of the entry.
  - ♦ **Display a sorted list of files:** Displays a list in alphabetical order of the files that were most recently added to the folder. This includes files that are attached to entries.
  - ♦ **Display calendar:** Displays the specified calendar with the full calendar view.
  - ♦ **Display task folder:** Displays the specified task folder with information about each task, such as the title, due date, priority, and so forth.
  - ♦ **Display survey:** Displays the specified survey in a full, interactive view. Users can participate in the survey directly from the landing page.
- ♦ **Graphic:** Enables you to reference a graphic that has previously been added to the workspace.
- ♦ **Link (URL):** Enables you to create a link to a Web URL.
- ♦ **Link to Folder/Workspace:** Enables you to add a link to a Vibe folder or workspace.
- ♦ **Link to Entry:** Enables you to add a link to a Vibe entry.
- ♦ **Utility Element:** Enables you to add various utilities, such as the My Workspace link.
- ♦ **Custom JSP:** Enables you to reference a custom JSP file that has previously been created by a Vibe administrator.

- ♦ **HTML:** Displays an HTML editor where you can compose messages, create links, upload pictures, and more. The information that you create in this HTML editor is displayed on your landing page.
  - ♦ **Embedded Web Page:** Enables you to reference any Web site and display it on your landing page.
- 4 Drag the element that you want to display on your landing page and drop it onto the landing page canvas.



After you drop the element onto the landing page canvas, you are prompted to configure it.

The way you configure a landing page element depends on the type of element that you add.

- 5 Configure the landing page element as described in [Section 6.2.3, “Configuring Landing Page Elements,”](#) on page 55.

## 6.2.3 Configuring Landing Page Elements

You need to configure the elements of your landing page when you are first creating them, as described in [Section 6.2.2, “Adding Content to Your Landing Page,”](#) on page 53.

You can also reconfigure the elements of your landing page at any time, as described in [Section 6.4, “Modifying the Contents of Your Landing Page,”](#) on page 67.

After you have added and configured the elements of your landing page, you are ready to publish the landing page. For information on how to do this, see [Section 6.3, “Publishing Your Landing Page,”](#) on page 67.

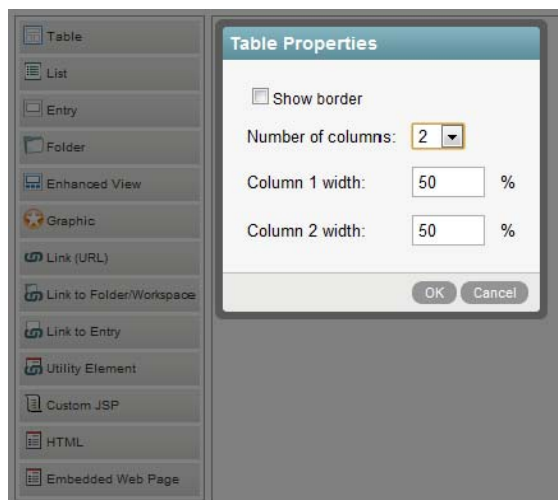
- ♦ “Adding a Table” on page 56
- ♦ “Adding a List” on page 56
- ♦ “Adding an Entry” on page 57
- ♦ “Adding a Folder” on page 58
- ♦ “Adding an Enhanced View Element” on page 59
- ♦ “Adding a Graphic” on page 60
- ♦ “Adding a Link (URL)” on page 61

- ◆ “Adding a Link to a Folder/Workspace” on page 61
- ◆ “Adding a Link to an Entry” on page 62
- ◆ “Adding a Utility Element” on page 63
- ◆ “Adding a Custom JSP” on page 64
- ◆ “Adding an HTML Editor” on page 66
- ◆ “Adding an Embedded Web Page” on page 66

## Adding a Table

To add a table to the landing page:

- 1 In the *Landing Page Layout* section, in the content editor, click *Table* in the element palette, then drag it and drop the table into the desired area of the landing page canvas.



- 2 Set the following configuration options to finish setting up the table:
  - ◆ **Show border:** Select this option if you want the border of the table to be visible.
  - ◆ **Number of columns:** Specify the number of columns that you want the table to have. You can have up to five columns.
  - ◆ **Column 1 width:** Specify the width that you want the first column to have.  
If your table has multiple columns, you can specify the width for each column.
- 3 Click *OK*.

After you add a table to a landing page, you can add content within the table.

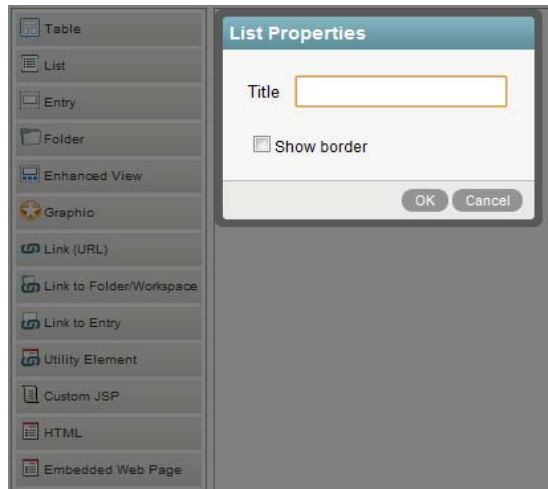
- 1 Select an element from the element palette and drag and drop it into the location of the table where you want to add the content.

## Adding a List

To add a list to the landing page:

- 1 In the *Landing Page Layout* section, in the content editor, click *List* in the element palette, then drag it and drop it into the desired area of the landing page canvas.





**2** Set the following configuration options to finish setting up the list:

- ♦ **Title:** Specify a title for the list.
- ♦ **Show border:** Select this option if you want the border of the list to be visible.

**3** Click *OK*.

After you add a list to a landing page, you can add content within the list.

- 1** Select an element from the element palette and drag and drop it into the location of the list where you want to add the content.

## Adding an Entry

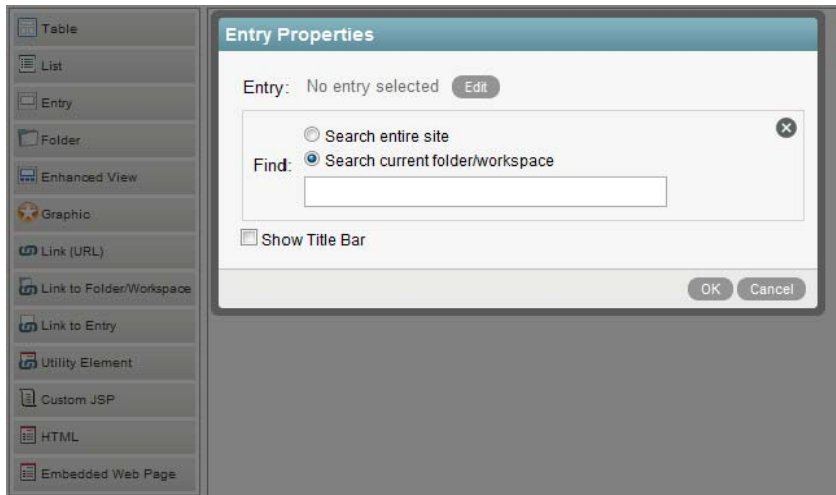
The actual content of your landing page is created in entries. The landing page simply references entries that have already been created within Vibe.

When you add an entry to the landing page by using the Entry element, only the entry title and description can be displayed. If you want to display entry comments, add the Enhanced View element to the landing page, as described in [“Adding an Enhanced View Element” on page 59](#).

To add an entry to the landing page:

- 1** In the *Landing Page Layout* section, in the content editor, click *Entry* in the element palette, then drag it and drop it into the desired area of the landing page canvas.
- 2** Click *Edit* next to the *Entry* field.

This field is populated only if you have already configured this element, as described in this section. When you are reconfiguring the element the entry that is being referenced is shown here.



3 Set the following configuration options to finish setting up the entry:

- ♦ **Find:** Select whether you want to search the entire site for the entry or only within the current folder or workspace, then in the provided field specify the entry that you want to display on the landing page.

This field uses type-to-find functionality, so Vibe displays the available options as you type. Click in the field and press the Spacebar to list all the available options.

- ♦ **Show Title Bar:** Select this option if you want the title bar of the entry to be visible.

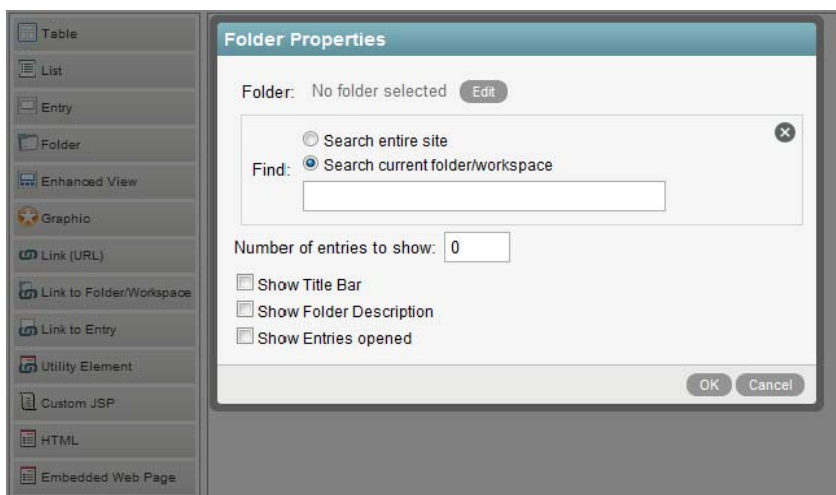
4 Click *OK*.

## Adding a Folder

1 In the *Landing Page Layout* section, in the content editor, click *Folder* in the element palette, then drag it and drop it into the desired area of the landing page canvas.

2 Click *Edit* next to the *Folder* field.

This field is populated only if you have already configured this element, as described in this section. After you have configured this element as described in this section, the folder that is being referenced is shown here.



**3** Set the following configuration options to finish setting up the folder:

- ♦ **Find:** Select whether you want to search the entire site for the folder or only within the current folder or workspace, then in the provided field specify the folder that you want to display on the landing page.

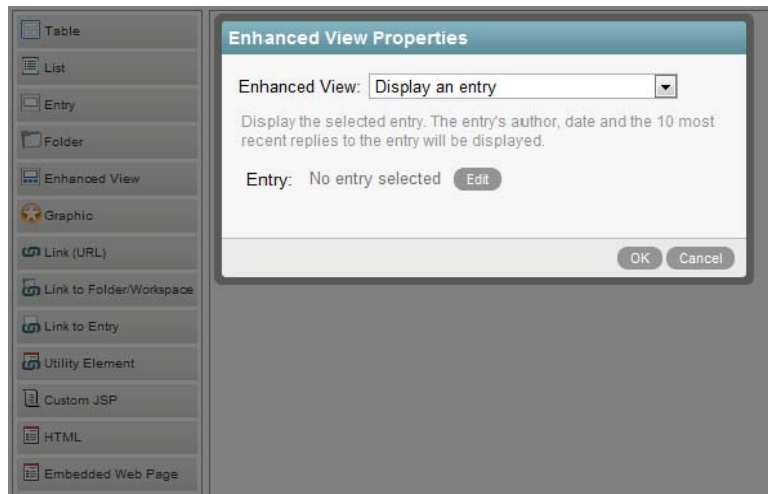
This field uses type-to-find functionality, so Vibe displays the available options as you type. Click in the field and press the Spacebar to list all the available options.

- ♦ **Number of entries to show:** Specify the number of folder entries that you want to be displayed at any one time.
- ♦ **Show Title Bar:** Select this option if you want the folder title bar to be displayed.
- ♦ **Show Folder Description:** Select this option if you want the folder description to be displayed.
- ♦ **Show Entries Opened:** Select this option if you want opened entries to be displayed.

**4** Click *OK*.

### Adding an Enhanced View Element

- 1** In the *Landing Page Layout* section, in the content editor, click *Enhanced View* in the element palette, then drag it and drop it into the desired area of the landing page canvas.



- 2** In the *Enhanced View* drop-down list, select one of the available options.

For more information about each option, see [Enhanced View](#).

- 3** Set the configuration options that apply to the enhanced view element that you are adding. Depending on the option that you selected in [Step 2](#), the following configuration options are available:

- ♦ **Entry:** Click *Edit*. This field is populated only if you have already configured this element, as described in this section. After you have configured this element as described in this section, the folder that is being referenced is shown here.
- ♦ **Folder:** Click *Edit*. This field is populated only if you have already configured this element, as described in this section. After you have configured this element as described in this section, the folder that is being referenced is shown here.

- ♦ **Find:** Select whether you want to search the entire site for the folder or entry, or only within the current folder or workspace, then in the provided field specify the folder or entry that you want to display on the landing page.
- ♦ **Number of entries to show:** (Conditional) Specify the number of folder entries that you want to be displayed at any one time.  
This option is displayed only when referencing a folder.
- ♦ **Width:** (Conditional) Specify the width that you want the calendar to be displayed on the landing page, either by percent or pixels.  
This option is displayed only when displaying a calendar.
- ♦ **Height:** (Conditional) Specify the height that you want the calendar to be displayed on the landing page, either by percent or pixels.  
This option is displayed only when displaying a calendar.
- ♦ **Show Title Bar:** Select this option if you want the title bar to be displayed.  
This option is not always displayed, depending on what you select in the *Enhanced View* drop-down list.

4 Click *OK*.

## Adding a Graphic

Before you can add a graphic to your landing page, you need to attach the graphic to the landing page, as described in [Section 6.9, “Enabling Graphics to Be Used on a Landing Page,” on page 73](#).

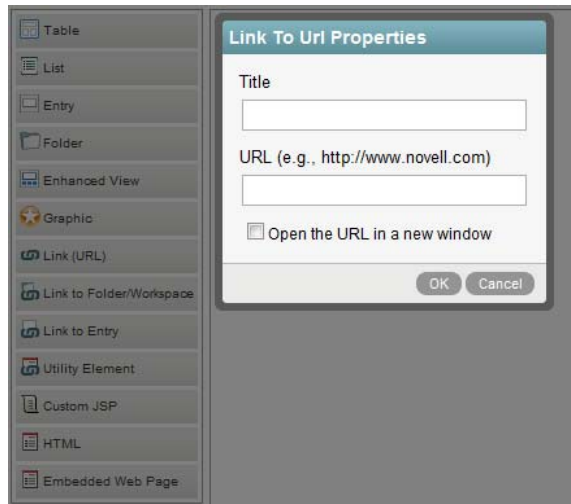
- 1 In the *Landing Page Layout* section, in the content editor, click *Graphic* in the element palette, then drag it and drop it into the desired area of the landing page canvas.



- 2 Set the following configuration options to finish setting up the graphic:
  - ♦ **Graphic:** In the Graphic drop-down list, select the graphic that you want to display.  
All attachments that are attached to the landing page workspace are displayed in this list. Attachments are also displayed in the *Current Attached Files* section at the bottom of the page.
  - ♦ **Show border:** Select this option if you want the border of the graphic to be visible.
- 3 Click *OK*.

## Adding a Link (URL)

- 1 In the *Landing Page Layout* section, in the content editor, click *Link (URL)* in the element palette, then drag it and drop it into the desired area of the landing page canvas.



- 2 Set the following configuration options to finish setting up the URL link:
  - ♦ **Title:** Specify the title that you want to be displayed.
  - ♦ **URL:** Specify the URL that you want to link to.

To link to a URL outside of Vibe, you must include `http://` at the beginning of the URL.

To link to a page within Vibe, the best method is to use the [Link to Folder/Workspace](#) element or the [Link to Entry](#) element.

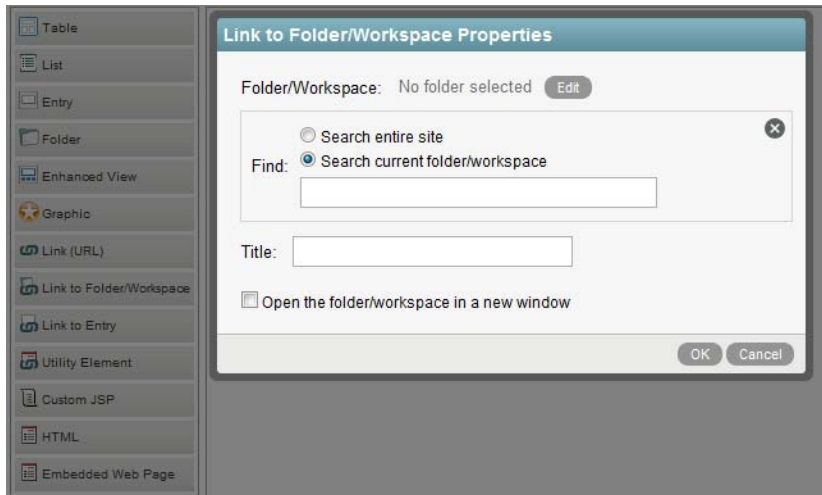
An alternative is to paste a Vibe permalink into this field. To get the permalink URL of a Vibe page, simply navigate to the page that you want to link to, click *Permalink* in the footer toolbar, then copy the permalink URL from the *Permalink* field.
  - ♦ **Open URL in a new window:** Select this option if you want to open the URL in a new browser window.
- 3 Click *OK*.

## Adding a Link to a Folder/Workspace

You can create a link to any folder or workspace for which you have appropriate rights.

- 1 In the *Landing Page Layout* section, in the content editor, click *Link to Folder/Workspace* in the element palette, then drag it and drop it into the desired area of the landing page canvas.
- 2 Click *Edit* next to the *Folder/Workspace* field.

This field is populated only if you have already configured this element, as described in this section. When you are reconfiguring the element, the folder or workspace that is being referenced is shown here.



**3** Set the following configuration options to finish setting up the link:

- ♦ **Find:** Select whether you want to search the entire site for the folder or only within the current folder or workspace, then in the provided field specify the folder or workspace that you want to link to.

This field uses type-to-find functionality, so Vibe displays the available options as you type.

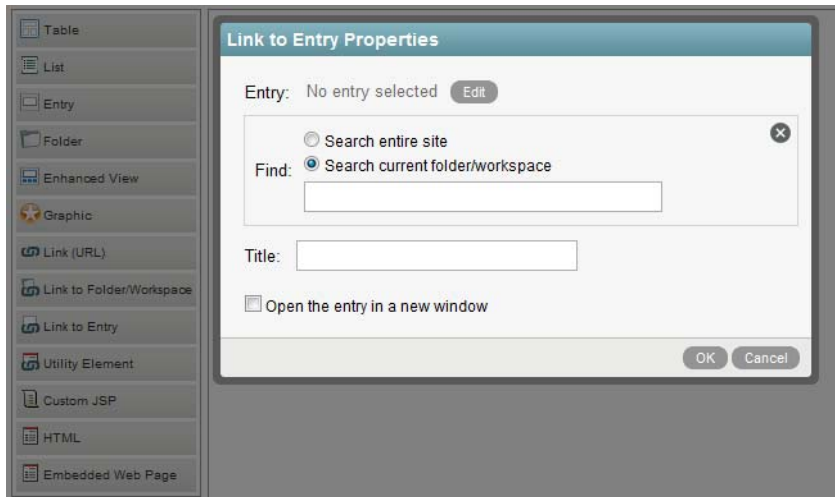
- ♦ **Title:** Specify a title for the link.
- ♦ **Open the folder/workspace in a new window:** Select this option if you want to open the folder or workspace in a new browser window.

### Adding a Link to an Entry

Enables you to create a link to any entry for which you have appropriate rights.

- 1 In the *Landing Page Layout* section, in the content editor, click *Link to Entry* in the element palette, then drag it and drop it into the desired area of the landing page canvas.
- 2 Click *Edit* next to the *Entry* field.

This field is populated only if you have already configured this element, as described in this section. When you are reconfiguring the element, the entry or workspace that is being referenced is shown here.



**3** Set the following configuration options to finish setting up the link:

- ♦ **Find:** Select whether you want to search the entire site for the entry or only within the current folder or workspace, then in the provided field specify the entry that you want to link to.

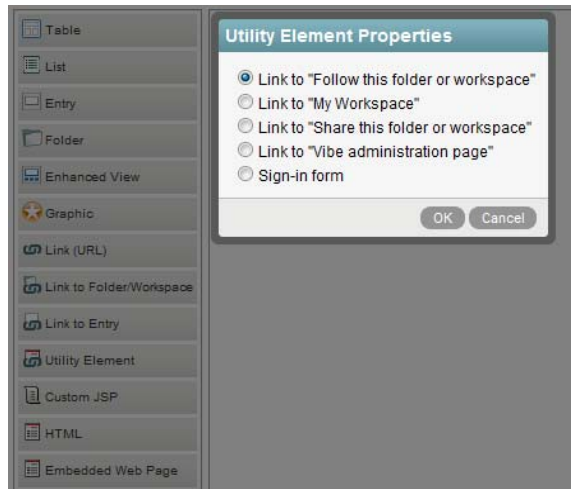
This field uses type-to-find functionality, so Vibe displays the available options as you type.

- ♦ **Title:** Specify a title for the link.
- ♦ **Open the entry in a new window:** Select this option if you want to open the entry in a new browser window.

### Adding a Utility Element

Most utility elements are options that are normally displayed either in the Vibe masthead or Navigation panel; however, because it is often desirable to hide the masthead and Navigation panel in order to make more room for information on your landing page, utility elements enable you to display important features in a more concise view.

- 1** In the *Landing Page Layout* section, in the content editor, click *Utility Element* in the element palette, then drag it and drop it into the desired area of the landing page canvas.



2 Select from the following utility elements:

**Link to “Follow this folder or workspace”:** Displays a *Follow This Workspace* or *Follow This Folder* link.

**Link to “My Workspace”:** Displays a link to your personal workspace.

**Link to “Share this folder or workspace”:** Displays a *Share This Workspace* or *Share This Folder* link.

**Link to “Vibe administration page”:** Provides a link to the Vibe Administration page.

This link is visible only to Vibe users who have administrative rights.

**Sign-in form:** Displays a Sign In form when users are not logged in to Vibe.

3 Click *OK*.

### Adding a Custom JSP

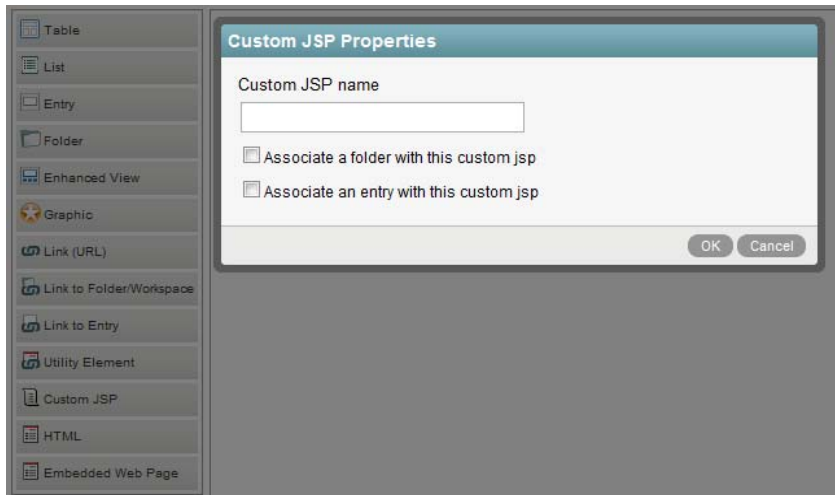
Custom JSP files are stored in the `WEB-INF\jsp\custom_jsps` directory. If you want to include a custom JSP file in your landing page, you must store the file in this directory in order to reference it from Vibe.

Typically, only Vibe administrators have access to this directory. If you want to create a custom JSP file, consult your Vibe administrator.

After the custom JSP file has been placed in the `WEB-INF\jsp\custom_jsps` directory:

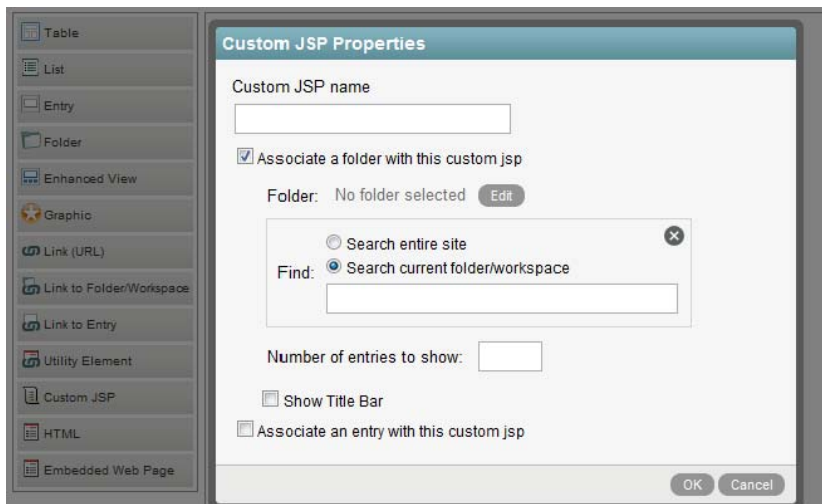
1 In the *Landing Page Layout* section, in the content editor, click *Custom JSP* in the element palette, then drag it and drop it into the desired area of the landing page canvas.





- 2 In the *Custom JSP name* field, type the name of the custom JSP file that you want to reference. You must obtain this filename from your Vibe administrator. Only your Vibe administrator can enable JSP files to be used in the Vibe site.
- 3 Depending on how you want to use this custom JSP file, select either *Associate a folder with this custom jsp*, or *Associate an entry with this custom jsp*.  
For example, if your administrator has enabled a custom JSP file that enhances the way entries are displayed on the landing page, and you want to utilize this JSP file for a specific folder, you would select *Associate a folder with this custom jsp*.
- 4 Click *Edit* next to the *Folder* field.

This field is populated only if you have already configured this element, as described in this section. When you are reconfiguring the element, the field displays the folder that the custom JSP file is currently associated with. If you are creating a new element, this field is blank.



- 5 Set the appropriate configuration options to finish setting up the custom JSP:  
**Find:** Select whether you want to search the entire site for the folder or only within the current folder or workspace, then in the provided field specify the folder that you want to associate the JSP file with.

This field uses type-to-find functionality, so Vibe displays the available options as you type.

**Number of entries to show:** Specify how many folder entries you want to be displayed on the landing page at any one time.

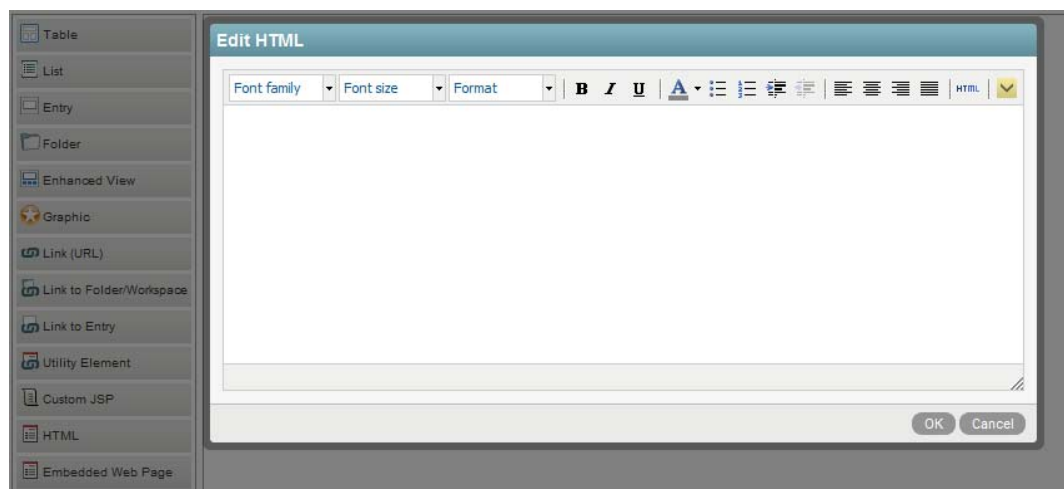
**Show Title Bar:** Select this option if you want the title bar of the entry to be visible.


- 6 Click *OK*.

## Adding an HTML Editor

To add content (such as text, links, pictures, and videos) to your landing page by using an HTML editor:

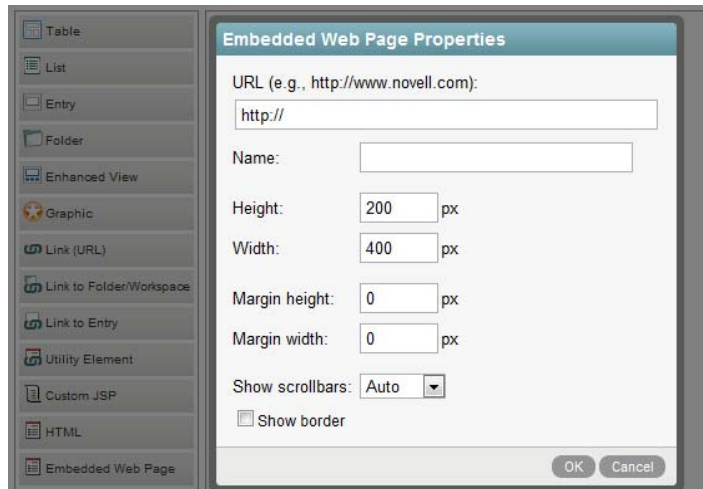
- 1 In the *Landing Page Layout* section, in the content editor, click *HTML* in the element palette, then drag it and drop it into the desired area of the landing page canvas.



- 2 Specify content into the HTML editor that you want to be displayed on the landing page. Click the *Show/Hide* icon  to show and hide additional options.
- 3 Click *OK*.

## Adding an Embedded Web Page

- 1 In the *Landing Page Layout* section, in the content editor, click *Embedded Web Page* in the element palette, then drag it and drop it into the desired area of the landing page canvas.



2 Set the following configuration options to finish setting up the embedded Web page:

- ♦ **URL:** Specify the URL for the embedded Web page that you want to display.
- ♦ **Name:** Specify a name that you want to call the page. This name is displayed on the landing page above the embedded Web page.
- ♦ **Height:** Specify the height (in pixels) of how much of the page you want to display.
- ♦ **Width:** Specify the width (in pixels) of how much of the page you want to display.
- ♦ **Margin height:** Adds margin height around the embedded Web page.  
This function is not supported on all browsers.
- ♦ **Margin width:** Adds margin width around the embedded Web page.  
This function is not supported on all browsers.
- ♦ **Show scrollbars:** Select whether you want to display scroll bars. Keep the default of *Auto* if you want Vibe to auto detect whether scroll bars are needed.
- ♦ **Show border:** Select whether you want to display a border around the embedded Web page.

3 Click *OK*.

## 6.3 Publishing Your Landing Page

After you have added elements to your landing page and configured them, you can publish the contents of the landing page.

- 1 Scroll to the bottom of the page that contains the landing page editor.
- 2 Click *OK*.

The landing page is displayed with all of the content that you previously added.

## 6.4 Modifying the Contents of Your Landing Page

Kablinc Vibe enables you to modify the elements that have been previously added to your landing page.


- 1 Navigate to the landing that contains the elements that you want to modify.

For information about each type of element that you can modify, see [Section 6.2.3, “Configuring Landing Page Elements,”](#) on page 55.

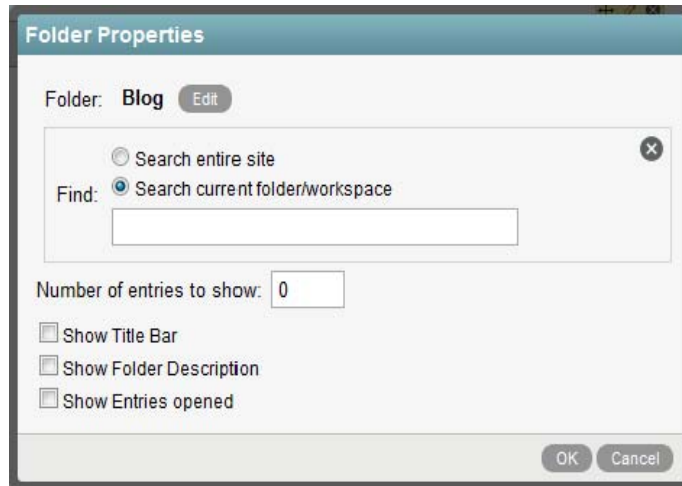
- 2 Click *Workspace > Edit Workspace* in the Action toolbar.

or

If your landing page is on a folder, click *Folder > Edit Folder*.

- 3 In the *Landing Page Layout* section, in the content editor, click the *edit* icon  located in the upper right corner of the landing page element that you want to modify.

The properties dialog box of the element that you are modifying is displayed.



- 4 Modify the properties of the element, then click *OK*.

## 6.5 Reordering the Content of Your Landing Page

Kablink Vibe enables you to change the order of elements that have been previously added to your landing page.


- 1 Navigate to the landing that contains the elements that you want to reorder.

For information about each type of element, see [Section 6.2.3, “Configuring Landing Page Elements,”](#) on page 55.

- 2 Click *Workspace > Edit Workspace* in the Action toolbar.

or


If your landing page is on a folder, click *Folder > Edit Folder*.

- 3 In the *Landing Page Layout* section, in the content editor, click the *Move* icon  located in the upper right corner of the landing page element that you want to move, then drag the element to the desired location on the landing page canvas.

## 6.6 Deleting Content from Your Landing Page

Kablink Vibe enables you to delete elements that have previously been added to your landing page.

- 1 Navigate to the landing page that contains the element that you want to delete.

- 2 Click *Workspace > Edit Workspace* in the Action toolbar.  
or  
If your landing page is on a folder, click *Folder > Edit Folder*.
- 3 In the *Landing Page Layout* section, in the content editor, click the *delete*  icon located in the upper right corner of the landing page element that you want to delete.
- 4 Click *OK* to delete the element.

## 6.7 Automatically Displaying the Newest Folder Entries on Your Landing Page

You do not need to manually modify your landing page every time you want to replace an entry. Because it can be tedious to delete an entry and then add another one from the Add/Delete form in the Edit Workspace page, Kablink Vibe enables you to leverage the power of workflows to help keep your landing page up-to-date, with minimal manual effort.

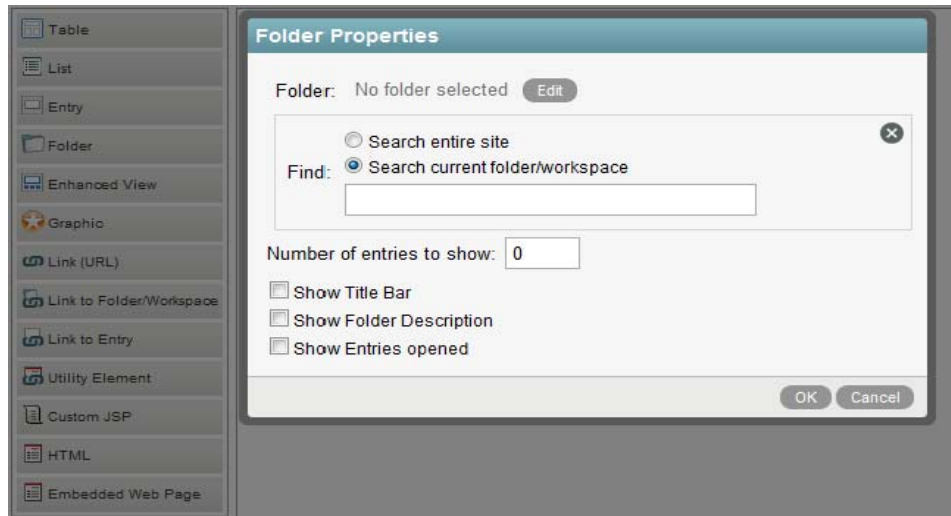
For example, suppose that you are the manager of a particular product, and you want to use your team landing page to display the product's earnings for the most recent quarter. You could reference a particular entry in the Quarterly Earnings folder, where all of the quarterly earnings for the product are stored; however, this would mean that at the end of each quarter you would need to manually delete the old entry from your landing page, and then add the new entry for the new quarter. Vibe provides an easier way: simply reference the Quarterly Earnings folder from your landing page, and at the end of each quarter start the Publish workflow (as described in [Section 11.6.1, "Available Workflows," on page 145](#)) on the entry that contains the earning for that quarter. This displays the entry that contains the updated quarterly earnings.

- ♦ [Section 6.7.1, "Pointing to the Folder Where the Entry Resides," on page 69](#)
- ♦ [Section 6.7.2, "Using the Publish Workflow to Publish Entries to Your Landing Page," on page 70](#)

### 6.7.1 Pointing to the Folder Where the Entry Resides

When you are adding content to your landing page (as described in [Section 6.2.2, "Adding Content to Your Landing Page," on page 53](#)), if you display an entry that you might want to replace in the future, reference the folder where the entry resides instead of referencing the entry directly.

- 1 Navigate to your landing page.
- 2 Click *Workspace > Edit Workspace*.  
or  
If your landing page is on a folder, click *Folder > Edit Folder*.
- 3 In the *Landing Page Layout* section, in the content editor, click *Folder* in the element palette, then drag it and drop it into the desired area of the landing page canvas.



4 Set the following configuration options to finish setting up the folder:

- ♦ **Folder:** This field is populated only if you have already configured this element, as described in this section. After you have configured this element as described in this section, the folder that is being referenced is shown here.
- ♦ **Find:** Specify the folder where the entry that you want to display resides. This field uses type-to-find functionality, so Vibe displays the available options as you type.
- ♦ **Number of entries to show:** Specify the number of folder entries that you want to be displayed at any one time.
- ♦ **Show Title Bar:** Select this option if you want the folder title bar to be displayed.
- ♦ **Show Folder Description:** Select this option if you want the folder description to be displayed.
- ♦ **Show Entries opened:** Select this option if you want opened entries to be displayed.

5 Click *OK*.

## 6.7.2 Using the Publish Workflow to Publish Entries to Your Landing Page

By default, Vibe includes a workflow called Publish. This workflow can help you more easily manage what is displayed on your landing page.

If you are referencing a folder from your landing page (as described in [Section 6.7.1, “Pointing to the Folder Where the Entry Resides,” on page 69](#)), and you have configured the landing page to display just one entry from the folder, you can use the Publish workflow to decide which entry you want to display on your landing page.

The most recent entry that you publish is the entry that is displayed on the landing page (published to the landing page).

- ♦ [“Enabling the Publish Workflow on Your Folder” on page 71](#)
- ♦ [“Publishing a New Entry to Your Landing Page” on page 71](#)

## Enabling the Publish Workflow on Your Folder

- 1 Navigate to the folder where you want to enable the Publish workflow.
- 2 Click *Folder > Configure* in the Action toolbar.  
The Configure Default Settings page is displayed.
- 3 In the *Allowed Workflows* section, select *Publish Workflow*.
- 4 Click *Apply > Close*.

## Publishing a New Entry to Your Landing Page

- 1 Open the entry that you want to display on your landing page.
- 2 In the Entry toolbar, click *Workflow > Start Workflow: Publish Workflow*.  
The entry where you most recently started the Publish workflow is now displayed on your landing page, replacing the entry that was previously displayed.

# 6.8 Adding Accessories to Your Landing Page


You can add accessories to a landing page by modifying the view of the standard landing page, or by creating a new landing page view. You must be the Vibe administrator to modify the view of the standard landing page. If you are not the Vibe administrator, you must create a new landing page view.

- ♦ [Section 6.8.1, “Modifying the Default Landing Page,” on page 71](#)
- ♦ [Section 6.8.2, “Creating a New Landing Page View,” on page 72](#)

## 6.8.1 Modifying the Default Landing Page

You can add the Accessory Panel to the default Landing Page view. This means that all landing pages that are created in the Vibe site will contain the Accessory Panel.

You must be the Kablink Vibe administrator or have administrative rights to modify the default Landing Page view.

- 1 Click the Administration icon , located in the upper right corner of the Vibe page.  
The administration page is displayed.
- 2 Under System, click *Form/View Designers*.  
The Form and View Designers page is launched.
- 3 Expand *Workspace view*, then click *Landing Page*.
- 4 Click *Workspace view > Add*.
- 5 In the *Standard Form Elements* section, click *Accessory Panel*, then click *OK*.  
The Accessory Panel has now been added to the standard Landing Page view, so users can add accessories to their landing pages.

## 6.8.2 Creating a New Landing Page View

You can create your own Landing Page view, then add the Accessory Panel element to the view. You do not need to be the Vibe administrator to create a new landing page view.

- ♦ [“Creating the New Landing Page Definition” on page 72](#)
- ♦ [“Adding the Landing Page Layout Option” on page 72](#)
- ♦ [“Enabling the New Landing Page” on page 73](#)
- ♦ [“Modifying the Landing Page After You Have Created It” on page 73](#)

### Creating the New Landing Page Definition

- 1 Navigate to the workspace where you want to create the new Landing Page view.
- 2 Click *Workspace > Form/View Designers* in the Action toolbar.  
The Form and View Designers page is displayed.
- 3 Click *New > Workspace views*.
- 4 Specify the following information:
  - Caption:** Specify a name for the new landing page.  
This is the name that appears in the Vibe interface for users to see when they use this workspace. (For example, Custom Landing Page.)
  - Name:** Specify the internal name for the landing page.  
The name that you enter in this field is not visible to users who use this workspace. (For example, custom\_landing\_page.)
  - Family:** Select the workspace type that this view is most closely associated with.
  - Workspace Icons:** Select the workspace icon that you want to represent the landing page.
- 5 Click *OK*.  
The Designer page is launched.
- 6 Continue with [“Adding the Landing Page Layout Option” on page 72](#).

### Adding the Landing Page Layout Option

- 1 In the Designer page, click *Workspace Add/Modify Form > Add*.
- 2 In the *Layout Options* section, click *Landing Page Layout*.
- 3 Specify the following information:
  - Caption:** Specify a name for the Landing Page Layout, or keep the default.
  - Name:** Specify the internal name for the Landing Page Layout.
- 4 Click *OK*.
- 5 Click *Workspace view > Add*.
- 6 In the *Standard Form Elements* section, click *Landing Page Layout*.
- 7 For the *Caption* and *Data item name* fields, retain the same information that you specified in [Step 3](#).
- 8 Click *OK > Close > Close*.
- 9 Continue with [“Enabling the New Landing Page” on page 73](#).



## Enabling the New Landing Page

After you have created the new landing page view, you need to enable it on the workspace.

- 1 From the workspace where you want to enable the landing page, click *Workspace > Configure*.  
The Configure Default Settings page is displayed.
- 2 In the *Default View* section, go to the *Local Definitions* subsection and select the landing page that you created.
- 3 Click *Apply > Close*.  
The landing page is now displayed when you access the workspace.
- 4 Continue with “[Modifying the Landing Page After You Have Created It](#)” on page 73.

## Modifying the Landing Page After You Have Created It

Now that you have created and enabled the new landing page, you can configure the landing page layout options, such as hiding the Navigation panel. This can give your landing page a more traditional landing page feel.

For information about how to modify the landing page layout options, see [Section 6.2.1, “Choosing Layout Options for Your Landing Page,”](#) on page 52.

# 6.9 Enabling Graphics to Be Used on a Landing Page

Before you can add a graphic to a landing page, as described in “[Adding a Graphic](#)” on page 60, you need to attach the graphic to the workspace or folder, depending on whether your landing page is on a workspace or folder.

- ♦ [Section 6.9.1, “Enabling Graphics to Be Used on a Workspace Landing Page,”](#) on page 73
- ♦ [Section 6.9.2, “Enabling Graphics to Be Used on a Folder Landing Page,”](#) on page 74

## 6.9.1 Enabling Graphics to Be Used on a Workspace Landing Page

- 1 Navigate to the landing page where you want to attach the graphic.
- 2 Click *Workspace > Edit Workspace*.
- 3 In the *Attachments* section, click *Browse*, then browse to and select the graphic that you want to add.
- 4 After the file is selected and is displayed in the *Attachments* field, click *OK*.

To delete a file from the workspace:

- 1 In the *Current Attached Files* section, select the file that you want to delete.
- 2 Click *OK*.

## 6.9.2 Enabling Graphics to Be Used on a Folder Landing Page

- ♦ [“Adding the Attachment Element to the Folder Form” on page 74](#)
- ♦ [“Attaching the Graphic to the Folder” on page 74](#)

### Adding the Attachment Element to the Folder Form

You should have already added the Landing Page element to both the folder Form and View in order to create a landing page for a folder. (For more information, see [Section 6.12, “Creating a Landing Page for a Folder,” on page 76.](#))

To enable graphics to be used on your folder landing page:

- 1 Add the Attachments element to the folder Form, as described in [Section 8.2, “Modifying an Existing Folder View,” on page 92.](#)  
You do not need to add the Attachments element to the folder View, because this element should only be displayed on the folder Form.
- 2 Continue with [“Attaching the Graphic to the Folder” on page 74.](#)

### Attaching the Graphic to the Folder

- 1 Navigate to the landing page where you want to attach the graphic.
- 2 Click *Folder > Edit Folder*.
- 3 In the *Attachments* section, click *Browse*, then browse to and select the graphic that you want to add.
- 4 After the file is selected and is displayed in the *Attachments* field, click *OK*.

To delete a file from the folder:

- 1 In the *Current Attached Files* section, select the file that you want to delete.
- 2 Click *OK*.

## 6.10 Displaying YouTube Videos on a Landing Page

Kablink Vibe enables you to display YouTube videos in various sections of a landing page.



- ♦ [Section 6.10.1, “Displaying Videos in the Branding Section of a Landing Page,” on page 74](#)
- ♦ [Section 6.10.2, “Displaying Videos in the Main Landing Page Area,” on page 75](#)

### 6.10.1 Displaying Videos in the Branding Section of a Landing Page

You can add a YouTube video to the Branding section of a landing page, as described in [Chapter 5, “Branding a Folder or Workspace,” on page 47.](#)

## 6.10.2 Displaying Videos in the Main Landing Page Area

You can display YouTube videos on a landing page in the following ways:

- ♦ By adding an HTML editor, as described in [“Adding an HTML Editor”](#) on page 66. Click the *Expand* icon , then click the Video icon .
- ♦ By referencing a folder or folder entry that contains a YouTube video, as described in [Section 6.2.2, “Adding Content to Your Landing Page,”](#) on page 53.

For information on how to create a folder entry that contains a YouTube video, see [“Displaying YouTube Videos in a Folder Entry”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

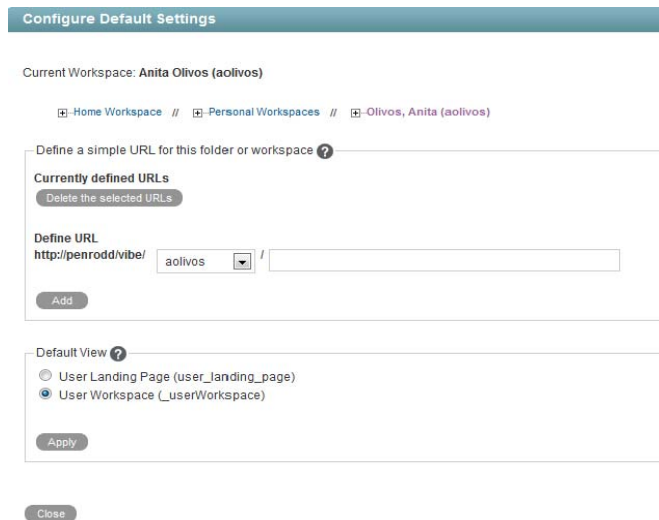
## 6.11 Creating a Landing Page for a Personal Workspace

You can create a landing page in a personal workspace only if your Kablink Vibe administrator has enabled you to do so. If you are unable to create a landing page on your personal workspace as described in this section, consult your Vibe administrator.

If you are a Vibe administrator and you want to enable landing page creation for personal workspaces, see [“Enabling Users to Create Landing Pages on Personal Workspaces”](#) in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

- 1 In your personal workspace, click *Workspace > Configure* in the Action toolbar.

The Configure Default Settings page is displayed.



Configure Default Settings

Current Workspace: Anita Olivos (aolivos)

Home Workspace // Personal Workspaces // Olivos, Anita (aolivos)

Define a simple URL for this folder or workspace ?

Currently defined URLs

Delete the selected URLs

Define URL

http://penrodd/vibe/ aolivos /

Add

Default View ?

User Landing Page (user\_landing\_page)

User Workspace (\_userWorkspace)

Apply

Close

- 2 In the *Default View* section, select the landing page option that your administrator added.

Default View ?

User Landing Page (user\_landing\_page)

User Workspace (\_userWorkspace)

Apply

- 3 Click *Apply* > *Close*.
- 4 Continue with [Section 6.2, “Setting Up Your Landing Page,”](#) on page 52 to complete the creation of your landing page.

## 6.12 Creating a Landing Page for a Folder

Displaying landing pages at the workspace level makes the workspace home page a quick portal to the most important information contained throughout the workspace. In addition to displaying landing pages at the workspace level, Kablink Vibe also enables you to display landing pages at the folder level.

You might want to create a landing page for a folder if your folder contains many sub-folders, is frequently visited, and contains a lot of information. Because workspace landing pages are more common than folder landing pages, the process for creating a landing page on the folder is more complex than creating a landing page for a workspace.

By default, in order to create a landing page for a folder in Vibe, you need to create a new folder view. (For example, you might name your folder view “Landing Page.”) You need to populate this folder view with the Landing Page Layout layout option in the Folder Form, and the Landing Page Layout element in the Folder View. For information on how to create a landing page by creating a new folder view, see [Chapter 8, “Creating Custom Folder Views,”](#) on page 87.

After you create the new landing page folder view, continue setting up your landing page by following the information in [Section 6.2, “Setting Up Your Landing Page,”](#) on page 52.

## 6.13 Downloading Existing Landing Pages

The Novell Vibe Resource Library provides a collection of existing Vibe folder entry forms, workflows, and landing pages that have been designed to solve specific business problems. You can easily download the custom forms and workflows, then import them into your Vibe environment. You can further customize these forms and workflows to suit your individual business needs.

- 1 Navigate to the [Novell Vibe Resource Library Web site](http://www.novell.com/products/vibe-onprem/resource-library/) (<http://www.novell.com/products/vibe-onprem/resource-library/>).
- 2 Click the *Workspaces* tab.
- 3 Select the custom workspace that you want to use in your Vibe environment.
- 4 In the *Attachment* section, click the zip file to download it.
- 5 Import the file into your Vibe environment and deploy it for use.

For information on how to do this, follow the [Novell Vibe Resource Library Deployment Instructions](http://www.novell.com/communities/node/8359/deployment-instructions) (<http://www.novell.com/communities/node/8359/deployment-instructions>).

# Creating Custom Workspace Views

# 7

Kablink Vibe OnPrem enables you to create custom workspace views and to customize existing views. Workspace views define what is displayed on the home page of your workspace. When you create custom workspace views, you can configure workspaces to display optional features such as remote applications, attachments, and more. You can even create a custom workspace landing page.

To create a custom workspace view, you must complete the following sections:

- ◆ [Section 7.1, “Creating a New Custom Workspace View,” on page 77](#)
- ◆ [Section 7.2, “Modifying an Existing Workspace View,” on page 82](#)
- ◆ [Section 7.3, “Enabling the Workspace View,” on page 82](#)
- ◆ [Section 7.4, “Populating Elements in the Workspace View,” on page 83](#)
- ◆ [Section 7.5, “Understanding Elements,” on page 83](#)
- ◆ [Section 7.6, “Understanding Layout Options,” on page 85](#)

## 7.1 Creating a New Custom Workspace View

To create a new custom workspace, you use the Form and View Designer to create a view, then you create a form with the elements and layout options that you want to display in the view. After the form is in place, you add the same elements and layout options to the view, then you can add optional view elements to create the final view.

You must have both a form and a view in order to display all the elements that you want in a workspace. The form and the view must have a common set of elements and layout options, but the view can have some additional elements that are not in the form.



- ◆ [Section 7.1.1, “Creating the View,” on page 78](#)
- ◆ [Section 7.1.2, “Adding Elements to the Workspace Add/Modify Form,” on page 78](#)
- ◆ [Section 7.1.3, “Adding Elements to the Workspace View,” on page 80](#)

## 7.1.1 Creating the View

- 1 Navigate to the workspace where you want to create the new view.
- 2 Click *Workspace > Form/View Designers* in the Action toolbar.  
The Form and View Designers page is launched.
- 3 Click *New > Workspace Views*.  
The Add a New Definition form is displayed.
- 4 Specify the following information in the Add a New Definition section:
  - Caption:** Specify the name of the workspace view that you want to appear in the Kablink Vibe interface. (For example, “Custom Workspace.”)
  - Name:** Specify the internal name of the workspace view. This name is not visible to regular Vibe users. (For example, “custom\_workspace.”)
  - Family:** Select the workspace type that this view is most closely associated with.
  - Workspace Icons:** Select the icon that you want to represent the workspace. The icon that you select is displayed with the name of the workspace in the Navigation panel.
- 5 Click *OK*.
- 6 Continue with [Section 7.1.2, “Adding Elements to the Workspace Add/Modify Form,”](#) on page 78.

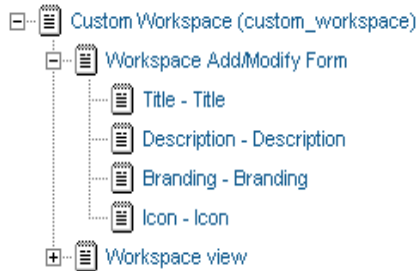
## 7.1.2 Adding Elements to the Workspace Add/Modify Form

The workspace add/modify form is the form you see when you are creating or modifying the content of your workspace home page. This form needs to contain the elements and layout options that you want to display in your workspace home page. For example, you might want to display multiple remote applications and a two-column table.

After you add elements and layout options to the workspace form, you must then add those same elements and layout options to the workspace view in order for the elements and options to be displayed in your workspace. For information on how to add features to the workspace view, see [Section 7.1.3, “Adding Elements to the Workspace View,”](#) on page 80.

- 1 Under the custom workspace form that you created, expand *Workspace Add/Modify Form*.  
If you are modifying an existing form, all of the elements and layout options that are currently applied to your form are displayed.  
or  
If you are creating a new form, only the default options are displayed.

### Marketing Designer >> Custom Workspace (custom\_workspace)



**2** Add and modify the desired elements and layout options, as described in the following sections:

- ♦ “Adding Elements to a Form” on page 79
- ♦ “Modifying Elements in a Form” on page 79
- ♦ “Deleting Elements in a Form” on page 80
- ♦ “Adding Layout Options to a Form” on page 80

Based on the modifications that you make to a form element or option, you might need to make the same modifications to the corresponding view element or option.

#### Adding Elements to a Form

- 1** Click *Workspace Add/Modify Form*.
- 2** In the *Workspace Add/Modify Form* window, on the right side of the page, click *Add*.
- 3** In the *Standard Form Elements* section, click the element that you want to add.  
For information on the types of elements that you can add, see [Section 7.5.1, “Workspace Form Elements,”](#) on page 83.
- 4** Specify the appropriate information.
- 5** Click *OK*.

#### Modifying Elements in a Form

If you are modifying an existing form, you can modify existing elements.

- 1** Expand *Workspace Add/Modify Form*, then click the element that you want to modify.
- 2** In the window on the right side of the page, click *Modify*.
- 3** Make the desired modifications, such as changing the caption or data name, then click *OK*.

## Deleting Elements in a Form

If you are modifying an existing form, you can delete existing elements.

- 1 Expand *Workspace Add/Modify Form*, then click the element that you want to delete.
- 2 In the window on the right side of the page, click *Delete*.
- 3 Click *OK*.

## Adding Layout Options to a Form

- 1 Click *Workspace Add/Modify Form*.
- 2 In the *Workspace Add/Modify Form* window, on the right side of the page, click *Add*.
- 3 In the *Layout Options* section, click the layout option that you want to add.  
For information on the types of layout options that you can add, see [Section 7.6, “Understanding Layout Options,”](#) on page 85.
- 4 Specify the appropriate information.
- 5 Click *OK*.

## 7.1.3 Adding Elements to the Workspace View

The workspace view is how the information from your workspace add/modify form is displayed to users who view your workspace. Every form must have a corresponding view. This view needs to contain all of the elements and layout options that you want to display in your workspace home page; it is made up of elements from the form.

Vibe provides you with all of the tools necessary to create a workspace view that suits any of the purposes that you want to accomplish with your workspace.

Before you can add elements and layout options to the workspace view, you must first add the elements and layout options to the workspace form in order for them to be displayed in your workspace. (For information on how to add features to the workspace form, see [Section 7.1.2, “Adding Elements to the Workspace Add/Modify Form,”](#) on page 78.)

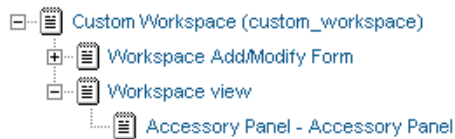
To add elements to the views

- 1 Under the custom entry form that you created, expand *Workspace view*.  
If you are modifying an existing view, all of the elements and layout options that are currently applied to your view are displayed.  
or  
If you are creating a new view, only the default options are displayed.



### Marketing

#### Designer >> Custom Workspace (custom\_workspace)



2 Add the desired elements and layout options, as described in the following sections:

- ♦ “Adding Elements to a View” on page 81
- ♦ “Modifying Elements in a View” on page 81
- ♦ “Deleting Elements in a View” on page 81
- ♦ “Adding Layout Options to a View” on page 82

#### Adding Elements to a View

- 1 Click *Workspace view*.
- 2 In the *Workspace View* window, on the right side of the page, click *Add*.
- 3 In the *Standard Form Elements* section, click the element that you want to add.

When you add elements to a view, you add elements that have already been added to the form; any form element that you create can be added as a view element.

For information on the types of elements that you can add that are specific to views, see [Section 7.5.2, “Workspace View Elements,” on page 85](#).

- 4 Specify the appropriate information.
- 5 Click *OK*.

#### Modifying Elements in a View

If you are modifying an existing view, you can modify existing elements.

- 1 Expand *Workspace view*, then click the element that you want to modify.
- 2 In the window on the right side of the page, click *Modify*.
- 3 Make the desired modifications, such as changing the caption or data name, then click *OK*.

#### Deleting Elements in a View

If you are modifying an existing view, you can delete existing elements.

- 1 Expand *Workspace view*, then click the element that you want to delete.
- 2 In the window on the right side of the page, click *Delete*.
- 3 Click *OK*.

## Adding Layout Options to a View

- 1 Click *Workspace view*.
- 2 In the Workspace view window, on the right side of the page, click *Add*.
- 3 In the *Layout Options* section, click the layout option that you want to add.  
For information on the types of layout options that you can add, see [Section 7.6, “Understanding Layout Options,”](#) on page 85.
- 4 Specify the appropriate information.
- 5 Click *OK*.

## 7.2 Modifying an Existing Workspace View

You can also create a custom workspace by modifying an existing workspace view.

- 1 In the folder or workspace where the custom workspace view was created, click *Workspace > Form/View Designers*.

The Form and View Designers page is launched.



- 2 Expand *Workspace view*, then click the custom workspace view that you want to modify.
- 3 Continue with [Section 7.1.2, “Adding Elements to the Workspace Add/Modify Form,”](#) on page 78.

## 7.3 Enabling the Workspace View

After you have created the workspace view, you need to enable it as the default view for the workspace.

- 1 Navigate to the workspace where you want to enable your custom view as the default view.
- 2 Click *Workspace > Configure* in the Action toolbar.  
The Configure Default Settings page is displayed.

- 3 In the *Default View* section, select the custom view that you created.
- 4 Click *Apply > Close*.

## 7.4 Populating Elements in the Workspace View

After you create a workspace view, you need to populate and customize some of the elements that you included in the view.

For example, if you added a Branding element, you need to create your brand to display in the workspace; if you added a Description element, you need to populate the element with a description of the workspace; if you added an Attachment element, you need to attach any files that you want to display in the workspace, and so forth.

- 1 After the workspace view has been created and enabled as the default workspace view, as described in [Section 7.3, “Enabling the Workspace View,” on page 82](#), navigate to the workspace.
- 2 Click *Workspace > Edit Workspace*.  
A page with all of the form elements that you added to the workspace view add/modify form is displayed. (If you want these elements to be displayed in the workspace, ensure that you have also added them to the view form of the workspace view.)
- 3 Populate the elements with the desired information.  
For example, create your workspace brand, add a workspace description, and attach any files.
- 4 Click *OK*.

## 7.5 Understanding Elements

Elements make up the content of your workspace forms and views.

When you are adding elements to a form, remember that you need to add that same element to the view in order for it to be displayed in the workspace.

You can add the following elements:

- ♦ [Section 7.5.1, “Workspace Form Elements,” on page 83](#)
- ♦ [Section 7.5.2, “Workspace View Elements,” on page 85](#)

### 7.5.1 Workspace Form Elements

**Attachment(s):** Adds a field that enables you to browse for and upload files, making them accessible to those who view the workspace.

The files that you upload are displayed in the workspace home page.

**Branding:** Adds an HTML text editor that enables you to create a brand for the workspace.

This brand is displayed in the upper left corner of the workspace.

**Checkbox:** Adds a check box that can be selected or deselected.

**Date:** Adds a field that launches a calendar applet when users click inside it.

**Date and Time:** Adds two fields. The first field launches a calendar applet, and the second field launches a time-selection applet when users click inside.

**E-Mail Address List:** Adds a field that enables you to specify e-mail addresses.

**Description:** Adds an HTML text editor that enables you to specify a description of the workspace.

**File Upload:** Adds a field that enables users to browse for and upload files.

**Group List:** Adds an element that enables users to add groups.

**Hidden Field:** Adds a hidden element. When you design the custom form, you can use this element to add boilerplate text to every entry that is created. This text is “hidden” because it does not appear on the entry form when users are creating an entry; however, the text does appear on the entry view after the entry is created.

**HTML Editor Text Area:** Adds an HTML text area where you can compose messages, create links, upload pictures, and more. The information that you create in this HTML editor is displayed in your folder.

**Icon:** Enables the workspace owner to choose from a selection of icons to represent the workspace.

**Number:** Adds a field that requires users to enter a number. Alphabetic characters are rejected.

**Picture:** Adds a field that enables you to browse for and upload pictures.

**Radio Buttons:** Enables you to display options that users can select with radio buttons.

**Remote Application:** Enables you to display certain applications that have been configured by your Vibe administrator.

For more information on remote applications, see [Chapter 12, “Managing Remote Applications,” on page 151](#).

**Selectbox:** Enables you to display options that users can select.

**Team List:** Adds a field that enables users to specify teams.

**Text:** Adds a field where users can enter text.

**Text Area:** Adds an expandable field where users can enter text.

**Title:** Adds a field that enables you to specify a title for the workspace.

**URL:** Add a field that converts any text into a hyperlink.

**User List:** Adds a field that enables you to specify other Vibe users, using type-to-find functionality. When you specify a user’s name when you modify the workspace, as described in [Section 8.4, “Populating Elements in the Folder View,” on page 93](#), Vibe displays the user’s name on the folder home page, with links to his or her personal workspaces.

**Users External to Vibe:** Vibe uses this option internally when synchronizing tasks and calendars to another application through iCal. You should not manually add this element to any form or view.

For more information about iCal in Vibe, see [“Synchronizing Tasks and Calendars to a Desktop Application”](#) in the *Kablinc Vibe OnPrem 3.1 User Guide*.

## 7.5.2 Workspace View Elements

Any form element that you create can be added as a view element, if you want it to appear in the view.

The following elements are specific to views; they cannot be added to a form.

**Accessory Panel:** Displays the Accessory Panel on the workspace home page. Users can use this panel to add community or personal accessories, depending on their individual rights.

For more information on accessories, see “[Managing Accessories](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

**Attachments:** Displays all attachments.

**Branding:** Displays the workspace branding.

**Entry Creation Date:** Displays the date that the entry was created.

**Entry Creator:** Displays who created the entry.

**Entry Creator and Creation Date:** Displays who created the entry and when they created it.

**Landing Page Layout:** Adds a landing page creation form that enables you to create landing page elements to display in your workspace.

You must add the Landing Page Layout layout option in the workspace add/modify form before you can add it as a view element.

**Title:** On the workspace home page, displays the title that you specified for the workspace.

**Workspace and Folder List:** Displays a workspace tree that contains the workspace and all sub-workspaces and sub-folders.

## 7.6 Understanding Layout Options

Layout options can enhance the presentation of your workspace forms and views.

When you are adding layout options to a form, remember that you need to add that same layout options to the view in order for it to be displayed in the workspace.

You can add the following form layout options:

**Box:** Places a box around the specified elements.

**Custom JSP:** Enables you to reference a custom JSP from the Vibe directory.

Custom JSPs must be created by Vibe administrators before you can reference them, as described in [Chapter 10, “Using Custom JSP Files to Enhance Your Vibe Pages,” on page 109](#).

**Divider:** Displays a horizontal line between elements.

**Expandable Area:** Displays an expandable tree element.

**Fieldset:** Adds a box that can contain other elements.

Use this option if your form is exceptionally long.

**HTML:** Adds HTML formatting.

**Landing Page Layout:** (For the View Definition, the Landing Page Layout is in the *Elements* section) Adds a landing page creation form that enables you to create landing page elements that you can populate when you modify your workspace.

**Three Column Table:** Enables you to add elements within a three-column table.

**Two Column Table:** Enables you to add elements within a two-column table.

# Creating Custom Folder Views

# 8

Kablink Vibe OnPrem enables you to design custom folder views. Folder views define what is displayed on the home page of your folder. When you design custom folder views, you can configure folders to display optional features such as remote applications, attachments, and more. You can even create a folder landing page.

To create a custom folder view, you must complete the following sections:

- ♦ [Section 8.1, “Creating a New Custom Folder View,” on page 87](#)
- ♦ [Section 8.2, “Modifying an Existing Folder View,” on page 92](#)
- ♦ [Section 8.3, “Enabling the Folder View,” on page 93](#)
- ♦ [Section 8.4, “Populating Elements in the Folder View,” on page 93](#)
- ♦ [Section 8.5, “Understanding Elements,” on page 93](#)
- ♦ [Section 8.6, “Understanding Layout Options,” on page 95](#)

## 8.1 Creating a New Custom Folder View

To create a new custom folder, you use the Form and View Designer to create a view, then you create a form with the elements and layout options that you want to display in the view. After the form is in place, you add the same elements and layout options to the view, then you can add optional view elements to create the final view.

You must have both a form and a view in order to display all the elements that you want in a folder. The form and the view must have a common set of elements and layout options, but the view can have some additional elements that are not in the form.

- ♦ [Section 8.1.1, “Creating the View,” on page 87](#)
- ♦ [Section 8.1.2, “Adding Elements to the Folder Add/Modify Form,” on page 88](#)
- ♦ [Section 8.1.3, “Adding Elements to the Folder View,” on page 90](#)

### 8.1.1 Creating the View

- 1 Navigate to the folder or workspace where you want to create the new view.

If you create a new folder view at the workspace level, the folder view can be enabled on any folder within the workspace. If you create the folder view at the folder level, the folder view can be enabled only on that folder where the view was created.

- 2 If you are creating the new folder view at the folder level, click *Folder > Form/View Designers* in the Action toolbar.

or

If you are creating the new folder view at the workspace level, click *Workspace > Form/View Designers* in the Action toolbar.

The Form and View Designers page is displayed.

- 3 Click *New > Folder Views*.

The Add a New Definition form is displayed.

- 4 Specify the following information in the Add a New Definition section:

**Caption:** Specify the name of the folder view that you want to appear in the Kablink Vibe interface. (For example, “Custom Blog.”)

**Name:** Specify the internal name of the folder view. This name is not visible to regular Vibe users. (For example, “custom\_blog.”)

**Family:** Select the folder type that this view is most closely associated with.

**Create a File Entry on file drag/drop:** Select this option if you want Vibe to create a new file entry when you drag and drop a file into the folder by using the Add Files to Folder feature, as described in “[Adding a File by Dragging and Dropping](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

If you do not select this option, the default entry type for the folder is created when you drag and drop a file into the folder using the Add Files to Folder feature, as described in “[Dragging and Dropping Files](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*. For example, in a Blog folder, a blog entry is created, and the file is added as an entry attachment.

If you are creating a new view for a Files folder, this option has no effect.

**Folder Icons:** Select the icon that you want to represent the folder. The icon that you select is displayed with the name of the folder in the Navigation panel.

- 5 Click *OK*.

- 6 Continue with [Section 8.1.2, “Adding Elements to the Folder Add/Modify Form,”](#) on page 88.

## 8.1.2 Adding Elements to the Folder Add/Modify Form

The *Folder Form* section in the Form and View Designers tool lets you choose the features you want to include in your folder.

After you add elements and layout options to the folder form, you must then add those same elements and layout options to the folder view in order for them to be displayed in your folder. For information on how to add features to the folder view, see “[Adding Elements to a Folder Form](#)” on page 89.

Vibe provides you with all of the tools necessary to create a folder form that suits any purpose that you want to accomplish with your folder.

- 1 Expand the custom folder form that you previously defined.



## Form and View Designers

### Marketing Designer >> custom folder (custom\_folder)



**2** Add, modify, and delete elements and layout options, as described in the following sections:

- ♦ “Adding Elements to a Folder Form” on page 89
- ♦ “Modifying Elements in a Folder Form” on page 89
- ♦ “Deleting Elements in a Folder Form” on page 90
- ♦ “Adding Layout Options to a Form” on page 90

Based on the modifications that you make to a form element or option, you might need to make the same modifications to the corresponding view element or option.

### Adding Elements to a Folder Form

- 1** Click *Folder Form*.
- 2** In the Folder Form window, on the right side of the page, click *Add*.
- 3** In the *Standard Form Elements* section, click the element that you want to add.

For information on the types of elements that you can add, see [Section 8.5.1, “Folder Form Elements,”](#) on page 93.

- 4** Specify the appropriate information to configure the element.
- 5** Click *OK*.

### Modifying Elements in a Folder Form

If you are modifying an existing form, you can modify existing elements.

- 1** Expand *Folder Form*, then click the element that you want to modify.
- 2** In the window on the right side of the page, click *Modify*.
- 3** Make the desired modifications, such as changing the caption or data name, then click *OK*.

## Deleting Elements in a Folder Form

If you are modifying an existing form, you can delete existing elements.

- 1 Expand *Folder Form*, then click the element that you want to delete.
- 2 In the window on the right side of the page, click *Delete*.
- 3 Click *OK*.

## Adding Layout Options to a Form

- 1 Click *Folder Form*.
- 2 In the Folder Form window, on the right side of the page, click *Add*.
- 3 In the *Layout Options* section, click the layout option that you want to add.  
For information on the types of layout options that you can add, see [Section 8.6, “Understanding Layout Options,”](#) on page 95.
- 4 Specify the appropriate information to configure the layout option.
- 5 Click *OK*.

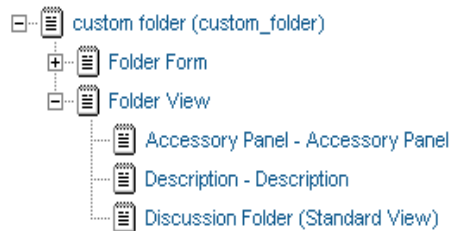
### 8.1.3 Adding Elements to the Folder View

The folder view is how your folder form is displayed to other users. Every folder form must have a view associated with it. This view needs to contain all of the elements that you want to display in your folder.

Vibe provides you with all of the tools necessary to create a folder view that suits any purpose that you want to accomplish with your folder.

- 1 Expand the custom folder view that you previously defined, then expand *Folder View*.  
If you are modifying an existing view, all of the elements and layout options that are currently applied to the view are displayed.  
or  
If you are creating a new view, only the default options are displayed.

### Marketing Designer >> custom folder (custom\_folder)



2 Add, modify, and delete elements and layout options, as described in the following sections:

- ♦ “Adding Elements to a Folder View” on page 91
- ♦ “Modifying Elements in a Folder View” on page 91
- ♦ “Deleting Elements in a Folder View” on page 92
- ♦ “Adding Layout Options to a Folder View” on page 92

#### Adding Elements to a Folder View

- 1 Click *Folder View*.
- 2 In the Folder View Definition window, on the right side of the page, click *Add*.
- 3 In the *Standard Form Elements* section, click the element that you want to add to the view.

For information on the types of elements that you can add, see [Section 8.5.2, “Folder View Elements,”](#) on page 95.

Before you can add some of these elements to your Folder View, you must first add them to the Folder Form. For information on how to do this, see “[Adding Elements to a Folder Form](#)” on page 89.

- 4 Specify the appropriate information to configure the element.
- 5 Click *OK*.

#### Modifying Elements in a Folder View

If you are modifying an existing view, you can modify existing elements.

- 1 Expand *Folder View*, then click the element that you want to modify.
- 2 In the window on the right side of the page, click *Modify*.
- 3 Make the desired modifications, such as changing the caption or data name, then click *OK*.

## Deleting Elements in a Folder View

If you are modifying an existing view, you can delete existing elements.

- 1 Expand *Folder View*, then click the element that you want to delete.
- 2 In the window on the right side of the page, click *Delete*.
- 3 Click *OK*.

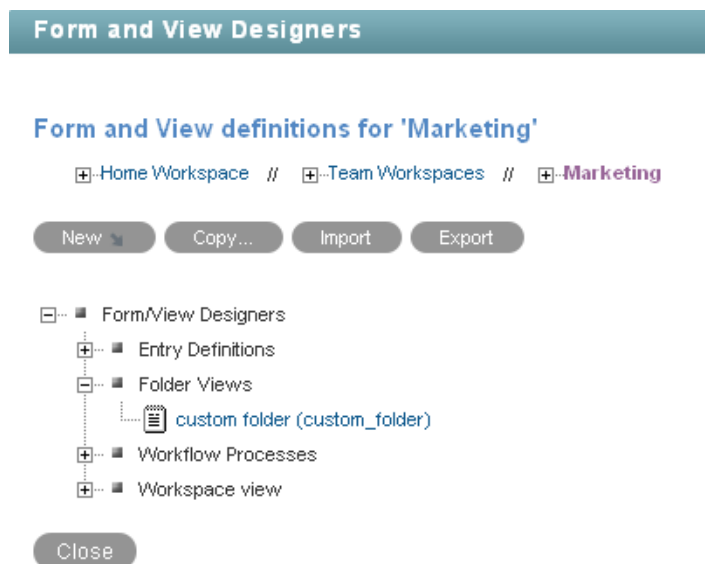
## Adding Layout Options to a Folder View

- 1 Click *Folder View*.
- 2 In the Folder View window, on the right side of the page, click *Add*.
- 3 In the *Layout Options* section, click the layout option that you want to add.  
For information on the types of layout options that you can add, see [Section 8.6, “Understanding Layout Options,”](#) on page 95.
- 4 Specify the appropriate information to configure the layout option.
- 5 Click *OK*.

## 8.2 Modifying an Existing Folder View

In addition to creating a new custom folder view as described in [Section 8.1, “Creating a New Custom Folder View,”](#) on page 87, you can create a custom folder by modifying an existing folder view.

- 1 In the folder or workspace where the custom folder view was previously defined, click *Folder > Form/View Designers*.  
The Form and View Designers page is launched.
- 2 Expand *Folder Views*, then click the custom folder view that you want to modify.



- 3 Continue with [Section 8.1.2, “Adding Elements to the Folder Add/Modify Form,”](#) on page 88.

## 8.3 Enabling the Folder View

After you have defined and designed the folder view, you need to enable it to be viewed by those who will use the folder.

You can enable the folder view to be the default folder view for a folder, or to be an alternate folder view.

For information on how to do this, see [Section 3.1, “Managing Folder Views,” on page 25](#).

## 8.4 Populating Elements in the Folder View

After you create and enable a folder view, you need to populate and customize some of the elements that you included in the view.

For example, if you added a Branding element, you need to create your brand to display in the folder; if you added a Description element, you need to populate the element with a description of the folder; if you added an Attachment element, you need to attach any files that you want to display in the folder, and so forth.

- 1 Ensure that the folder view has been created and enabled as the default folder view, as described in [Section 8.1, “Creating a New Custom Folder View,” on page 87](#) and [Section 8.3, “Enabling the Folder View,” on page 93](#).
- 2 Navigate to the folder where you enabled the folder view.
- 3 Click *Folder > Edit Folder* in the Action toolbar.

A page with all of form elements that you added to the folder form is displayed. (If you want these elements to be displayed in the folder, ensure that you have also added them to the folder view, as described in [Section 8.1.3, “Adding Elements to the Folder View,” on page 90](#).)
- 4 Populate the elements with the desired information.

For example, create your folder brand, add a folder description, attach any files, and so forth.
- 5 Click *OK*.

## 8.5 Understanding Elements

Elements make up the content of your forms and views. Some elements can be used only once.

When you are adding elements, remember that when you add an element to a form, you need to add that same element to the view in order for it to be displayed in the folder.

You can add the following elements:

- ♦ [Section 8.5.1, “Folder Form Elements,” on page 93](#)
- ♦ [Section 8.5.2, “Folder View Elements,” on page 95](#)

### 8.5.1 Folder Form Elements

**Attachments:** Enables you to display uploaded files as an attachment.

Attachments include a thumbnail, and details about the document, such as file size and author.

**Branding:** Enables you to brand your folder.

**Checkbox:** Adds a check box that can be selected or deselected.

**Date:** Adds a field that launches a calendar applet when users click inside it.

**Date and Time:** Adds two fields. The first field launches a calendar applet, and the second field launches a time-selection applet when users click inside.

**E-Mail Address List:** Adds a field that enables you to specify e-mail addresses.

**Description:** Adds an HTML text editor that enables you to provide a description of the folder.

**File Upload:** Enables you to upload files.

**Group List:** Adds an element that enables users to add groups.

**Hidden Field:** Adds a hidden element. When you design the custom form, you can use this element to add boilerplate text to every entry that is created. This text is “hidden” because it does not appear on the entry form when users are creating an entry; however, the text does appear on the entry view after the entry is created.

**HTML Editor Text Area:** Adds an HTML text editor where you can compose messages, create links, upload pictures, and more. The information that you create in this HTML editor is displayed in your folder.

**Icon:** Enables you to change the folder icon that is displayed in the Navigation panel.

**Number:** Adds a field that requires users to enter a number. Alphabetic characters are rejected.

**Picture:** Adds a field that enables you to upload a picture to display in your folder.

**Radio Buttons:** Enables you to display options that users can select with radio buttons.

**Remote Application:** Enables you to display certain applications that have been configured by your Vibe administrator.

For more information on remote applications, see [Chapter 12, “Managing Remote Applications,” on page 151](#).

**Selectbox:** Enables you to display options that users can select.

**Team List:** Adds a field that enables users to specify teams.

**Text:** Adds a field where users can enter text.

**Text Area:** Adds an expandable field where users can enter text.

**Title:** Adds a field that enables you to specify a title for the workspace.

**URL:** Add a field that converts any text into a hyperlink.

**User List:** Adds a field that enables you to specify other Vibe users, using type-to-find functionality. When you specify a user’s name when you modify the workspace, as described in [Section 8.4, “Populating Elements in the Folder View,” on page 93](#), Vibe displays the user’s name on the folder home page, with links to his or her personal workspaces.

**Users External to Vibe:** Vibe uses this option internally when synchronizing tasks and calendars to another application through iCal. You should not manually add this element to any form or view.

For more information about iCal in Vibe, see [“Synchronizing Tasks and Calendars to a Desktop Application”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

## 8.5.2 Folder View Elements

Any form element that you create can be added as a view element, if you want it to show up in the view.

The following elements are specific to views; they cannot be added to a form.

**Accessory Panel:** Displays the Accessory Panel on the workspace home page. Users can use this panel to add community or personal accessories, depending on their individual rights.

For more information on Accessories, see [“Managing Accessories”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

**Discussion Folder:** Displays folder entries in the Discussion folder view.

**Entry Creation Date:** Displays the date and time that an entry was created.

**Entry Creator:** Displays the creator of an entry.

**Entry Creator and Creation Date:** Displays who created the entry and when they created it.

**Landing Page Layout:** Adds a landing page creation form that enables you to create landing page elements to display in your folder.

You must add the Landing Page Layout layout option in the folder form before you can add it as a view element.

**Title:** Adds a field that enables you to specify a title for the workspace.

## 8.6 Understanding Layout Options

Layout options can enhance the presentation of your folder forms and views in Kablink Vibe.

When you are adding layout options to a form, remember that you need to add that same layout options to the view in order for it to be displayed in the folder.

You can add the following layout options:

**Box:** Places a box around the specified elements.

**Custom JSP:** Enables you to reference a custom JSP from the Vibe directory.

Custom JSPs must be created by Vibe administrators before you can reference them, as described in [Chapter 10, “Using Custom JSP Files to Enhance Your Vibe Pages,”](#) on page 109.

**Divider:** Displays a horizontal line between elements.

**Expandable Area:** Displays an expandable tree element.

Use this option if your form is exceptionally long.

**Fieldset:** Adds a box that can contain other elements.

**HTML:** Adds HTML formatting.

**Landing Page Layout:** (For the View Definition, the Landing Page Layout is in the *Elements* section) Adds a landing page creation form that enables you to create landing page elements that you can populate when you modify your workspace.

**Three Column Table:** Enables you to add elements within a three-column table.

**Two Column Table:** Enables you to add elements within a two-column table.



# Designing Custom Folder Entry Forms

# 9

Folder Entry forms in Kablink Vibe OnPrem can be customized to suit your precise business needs. You can create your own custom entry forms and views by using the Vibe Form and View Designers tool, or you can download existing custom entry forms from the Novell Vibe Resource Library.

- ♦ [Section 9.1, “Downloading Existing Custom Forms and Workflows,” on page 97](#)
- ♦ [Section 9.2, “Creating a Custom Folder Entry Form,” on page 97](#)
- ♦ [Section 9.3, “Modifying an Existing Entry Form,” on page 104](#)
- ♦ [Section 9.4, “Understanding Elements,” on page 105](#)
- ♦ [Section 9.5, “Understanding Layout Options,” on page 107](#)

## 9.1 Downloading Existing Custom Forms and Workflows

The Novell Vibe Resource Library provides a collection of existing Kablink Vibe folder entry forms and workflows that have been designed to solve specific business problems. You can easily download the custom forms and workflows, then import them into your Vibe environment. You can further customize these forms and workflows to suit your individual business needs.

- 1 Go to the [Novell Vibe Resource Library Web site \(http://www.novell.com/products/vibe-onprem/resource-library/\)](http://www.novell.com/products/vibe-onprem/resource-library/).
- 2 Click *Forms and Workflows*.
- 3 Select the custom form or workflow that you want to use in your Vibe environment.
- 4 In the *Attachment* section, click the zip file to download it.
- 5 Import the file into your Vibe environment and deploy it for use.

For information on how to do this, follow the [Novell Vibe Resource Library Deployment Instructions \(http://www.novell.com/communities/node/8359/deployment-instructions\)](http://www.novell.com/communities/node/8359/deployment-instructions).

## 9.2 Creating a Custom Folder Entry Form

Kablink Vibe enables you to create custom folder entry forms. For example, you can create a custom entry form for an expense report.

To create a new custom workspace, you use the Form and View Designer to create a view, then you create a form with the elements and layout options that you want to display in the view. After the form is in place, you add the same elements and layout options to the view, then you can add optional view elements to create the final view.

You must have both a form and a view in order to display all the elements that you want in a workspace. The form and the view must have a common set of elements and layout options, but the view can have some additional elements that are not in the form.

## 9.2.1 Creating the Folder Entry Form

- 1 Navigate to the folder or workspace where you want to create the custom entry form.  
If you create the entry form in a folder, the form can be applied only to entries in that folder. If you create the entry form in a workspace, the form can be applied to entries in any folder in the workspace.
- 2 If you are creating the entry form at the folder level, click *Folder > Form/View Designers* in the Action toolbar.  
or  
If you are creating the entry form at the workspace level, click *Workspace > Form/View Designers* in the Action toolbar.  
The Form and View Designers page is displayed.
- 3 Click *New > Entry Definitions*.  
The Add a New Definition form is displayed.
- 4 Specify the following information in the Add a New Definition section:

**Caption:** Specify a name for the folder entry.

This is the name that appears in the Vibe interface. Users see it when they create an entry of this type. (For example, “Expense Report.”)

**Name:** Specify the internal name for the folder entry.

The name that you enter in this field is not visible to users who create this type of entry. (For example, “expense\_report.”)

**Family:** Select the item type that is closest to the function of the item you are creating. Users can use the family type when performing filtered searches.

**Allowed Comments/Reply Types:** Select all of the comments or reply types that you want to allow on the entry.

When users comment on this type of entry, they can choose from the options that you specify in this section.

To select multiple options, hold the Ctrl key while selecting the comment or reply types.

5 Click *OK*.

6 Continue with [Section 9.2.2, “Adding Elements to the Entry Form Definition,”](#) on page 99.

## 9.2.2 Adding Elements to the Entry Form Definition

The entry form is what users see when they are creating a new entry. This form needs to contain all of the fields necessary for users to create this type of entry. For example, an Expense Report form needs to contain the expense code, the purpose for the expense, the cost of the expense, and so forth.

After you add elements and layout options to the entry form, you must then add all of the elements and layout options to the entry view in order for them to be displayed when users view the entry. (For information on how to add elements to the entry view, see [Section 9.2.3, “Adding Elements to the Entry View Definition,”](#) on page 101.)

To add elements to the form:

1 Under the custom entry form that you created, expand *Entry Form Definition*, then expand *Form*.

All of the elements and layout options that are currently applied to your form are displayed.

### Marketing Designer >> Expense Report (expense\_report)



2 Add, modify, and delete the desired elements and layout options, as described in the following sections:

- ♦ “Adding Elements to a Form” on page 100
- ♦ “Modifying Elements in a Form” on page 100
- ♦ “Deleting Elements in a Form” on page 100
- ♦ “Adding Layout Options to a Form” on page 101

Based on the modifications that you make to a form element or option, you might need to make the same modifications to the corresponding view element or option.

#### Adding Elements to a Form

- 1 Click *Form*.
- 2 In the Form window, on the right side of the page, click *Add*.
- 3 In the *Standard Form Elements* section, click the element that you want to add.  
For information on the types of elements that you can add, see [Section 9.4.1, “Entry Form Elements,” on page 105](#).
- 4 Specify the appropriate information to configure the element.
- 5 Click *OK*.

#### Modifying Elements in a Form

- 1 Expand *Form*, then click the element that you want to modify.
- 2 In the window on the right side of the page, click *Modify*.
- 3 Make the desired modifications, such as changing the caption or data name, then click *OK*.

#### Deleting Elements in a Form

- 1 Expand *Form*, then click the element that you want to delete.

- 2 In the window on the right side of the page, click *Delete*.
- 3 Click *OK*.

### **Adding Layout Options to a Form**

- 1 Click *Form*.
- 2 In the Form window, on the right side of the page, click *Add*.
- 3 In the *Layout Options* section, click the layout option that you want to add.  
For information on the types of layout options that you can add, see [Section 9.5, “Understanding Layout Options,” on page 107](#).
- 4 Specify the appropriate information to configure the element.
- 5 Click *OK*.

### **9.2.3 Adding Elements to the Entry View Definition**

The entry view is how the information from your entry form is displayed to users who view your entry. Every form must have a corresponding view. This view needs to contain all of the fields necessary for users to get the information they need when viewing the entry; it is made up of elements from the form.

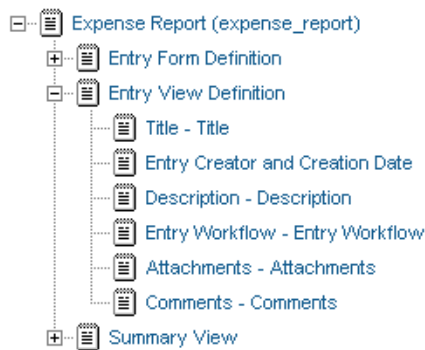
Before you can add elements and layout options to the entry view, you must first add those same elements and layout options to the entry form in order for them to be displayed in your entry. (For information on how to add features to the entry form, see [Section 9.2.2, “Adding Elements to the Entry Form Definition,” on page 99](#).)

To add elements to the view:

- 1 Under the custom entry form that you created, expand *Entry View Definition*.

## Form and View Designers

### Marketing Designer >> Expense Report (expense\_report)



2 Add, modify, and delete the desired elements and layout options, as described in the following sections:

- ♦ “Adding Elements to an Entry View Definition” on page 102
- ♦ “Modifying Elements in an Entry View Definition” on page 102
- ♦ “Deleting Elements in an Entry View Definition” on page 102
- ♦ “Adding Layout Options to an Entry View Definition” on page 103

#### Adding Elements to an Entry View Definition

- 1 Click *Entry View Definition*.
- 2 In the Entry View Definition window, on the right side of the page, click *Add*.
- 3 In the *Standard Form Elements* section, click the element that you want to add.  
For information on the types of elements that you can add, see [Section 9.4.2, “Entry View Elements,”](#) on page 107.
- 4 Specify the appropriate information to configure the element.
- 5 Click *OK*.

#### Modifying Elements in an Entry View Definition

- 1 Expand *Entry View Definition*, then click the element that you want to modify.
- 2 In the window on the right side of the page, click *Modify*.
- 3 Make the desired modifications, then click *OK*.

#### Deleting Elements in an Entry View Definition

- 1 Expand *Entry View Definition*, then click the element that you want to delete.
- 2 In the window on the right side of the page, click *Delete*.
- 3 Click *OK*.

## Adding Layout Options to an Entry View Definition

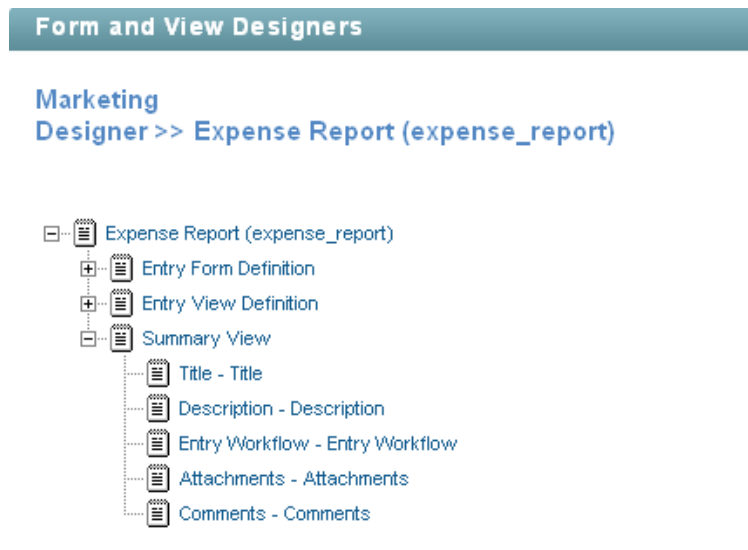
- 1 Click *Entry View Definition*.
- 2 In the Entry View Definition window, on the right side of the page, click *Add*.
- 3 In the *Layout Options* section, click the layout option that you want to add.  
For information on the types of layout options that you can add, see [Section 9.5, “Understanding Layout Options,” on page 107](#).
- 4 Specify the appropriate information to configure the element.
- 5 Click *OK*.

## 9.2.4 Adding Elements to the Summary View

The summary view is used to display entries in a folder before the entries are opened.

To add elements to the summary view:

- 1 Under the custom entry form that you created, expand *Summary View*.



- 2 Add, modify, and delete the desired elements and layout options, as described in the following sections:
  - ♦ [“Adding Elements to a Summary View” on page 103](#)
  - ♦ [“Modifying Elements in an Summary View Definition” on page 104](#)
  - ♦ [“Deleting Elements in an Summary View Definition” on page 104](#)
  - ♦ [“Adding Layout Options to a Summary View” on page 104](#)

### Adding Elements to a Summary View

- 1 Click *Summary View*.
- 2 In the Summary View window, on the right side of the page, click *Add*.
- 3 In the *Standard Form Elements* section, click the element that you want to add.

For information on the types of elements that you can add, see [Section 9.4.2, “Entry View Elements,”](#) on page 107.

- 4 Specify the appropriate information to configure the element.
- 5 Click *OK*.

### **Modifying Elements in an Summary View Definition**

- 1 Expand *Summary View*, then click the element that you want to modify.
- 2 In the window on the right side of the page, click *Modify*.
- 3 Make the desired modifications, then click *OK*.

### **Deleting Elements in an Summary View Definition**

- 1 Expand *Summary View*, then click the element that you want to delete.
- 2 In the window on the right side of the page, click *Delete*.
- 3 Click *OK*.

### **Adding Layout Options to a Summary View**

- 1 Click *Summary View*.
- 2 In the Summary View window, on the right side of the page, click *Add*.
- 3 In the *Layout Options* section, click the layout option that you want to add.

For information on the types of layout options that you can add, see [Section 9.5, “Understanding Layout Options,”](#) on page 107.

- 4 Specify the appropriate information to configure the element.
- 5 Click *OK*.

## **9.3 Modifying an Existing Entry Form**

- 1 Navigate to the folder or workspace where the custom folder entry was created.
- 2 If the folder entry was created at the folder level, click *Folder > Form/View Designers* in the Action toolbar.

or

If the folder entry was created at the at the workspace level, click *Workspace > Form/View Designers* in the Action toolbar.

The Form and View Designers page is displayed.



## Form and View Designers

### Form and View definitions for 'Marketing'

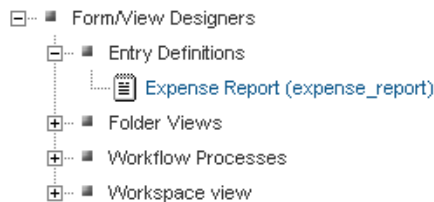
[-] Home Workspace // [-] Team Workspaces // [-] Marketing

New ▾

Copy...

Import

Export



Close

- 3 Expand *Entry Definitions*, then click the custom entry that you want to modify.
- 4 Continue with [Section 9.2.2, “Adding Elements to the Entry Form Definition,”](#) on page 99.

## 9.4 Understanding Elements

Elements make up the content of your forms and views.

When you are adding elements, remember that when you add an element to a form, you need to add that same element to the view in order for it to be displayed in the custom form.

You can add the following elements:

- ♦ [Section 9.4.1, “Entry Form Elements,”](#) on page 105
- ♦ [Section 9.4.2, “Entry View Elements,”](#) on page 107

### 9.4.1 Entry Form Elements

**Cancel Button:** Adds the *Cancel* button.

**Checkbox:** Adds a check box that can be selected and deselected.

**Date:** Adds a field that launches a calendar applet when users click inside it.

**Date and Time:** Adds two fields. The first field launches a calendar applet, and the second field launches a time-selection applet when users click inside.

**E-Mail Address List:** Adds a field that enables you to specify e-mail addresses.

**Event:** Adds fields that enable users to specify the start time and end time of an event.

**File Upload:** Adds a field that enables users to browse for and upload files.

**Form:** This element is for internal use and is required on the entry form.

**Form Buttons:** Adds the *OK* and *Cancel* buttons.

**Group List:** Adds a type-to-find field that enables users to find and select Vibe groups.

**Guest User Name:** Adds a field where users who are logged in to the Vibe site as Guest can specify their name. This field is displayed on the entry form only when the Guest user is viewing the form.

**HTML Editor Text Area:** Adds an HTML text area where users can compose messages, create links, upload pictures, and more.

**Hidden Field:** Adds a hidden element. When you design the custom form, you can use this element to add boilerplate text to every entry that is created. This text is “hidden” because it does not appear on the entry form when users are creating an entry; however, the text does appear on the entry view after the entry is created.

**Icon:** Enables the workspace owner to choose an icon to represent the workspace.

**Number:** Adds a field that requires users to enter a number. Alphabetic characters are rejected.

**Picture:** Adds a field that enables users to browse for and upload pictures.

**Places:** Adds a workspace tree that enables users to browse to and select folders.

**Radio Buttons:** Enables you to display options that users can select with radio buttons.

**Remote Application:** Enables you to choose a remote application to display.

Remote applications must be created and enabled for use by the Vibe administrator.

**Selectbox:** Enables you to display options that users can select.

**Send E-Mail When Entry is Submitted:** Adds an option that enables users to automatically send an e-mail to other Vibe users, after the entry is submitted.

**Show Only When In Workflow States:** Enables you to hide elements from being displayed on the entry form unless the entry is in a designated state of a workflow.

**Subscribe to This Entry:** Adds an option that enables users to subscribe to the entry.

**Survey:** Adds options that enable users to create a survey.

**Team List:** Adds a field that enables users to specify teams.

**Text:** Adds a field where users can enter text.

**Text Area:** Adds an expandable field where users can enter text.

**Title:** Adds a field where users can enter a title for the entry.

**URL:** Add a field that converts any text into a hyperlink.

**User List:** Adds a field that enables users to use the type-to-find functionality to specify other Vibe users.

**User List Selectbox:** Adds a list of users. This list is taken from the user element that is defined at the folder level.

**Users External to Vibe:** Vibe uses this option internally when synchronizing tasks and calendars to another application by using iCal. You should not manually add this element to any form or view.

For more information about iCal in Vibe, see “[Synchronizing Tasks and Calendars to a Desktop Application](#)” in the *Kablank Vibe OnPrem 3.1 User Guide*.

## 9.4.2 Entry View Elements

Any form element that you create can be added as a view element, if you want it to appear in the view.

The following elements are specific to views; they cannot be added to a form.

**Attachments:** Displays all attachments.

**Comments:** Displays all comments.

**Comments and Attachments Tabs:** Displays the *Comments* and *Attachments* tabs. Also, where applicable, it displays the *Entry History* and *File Versions* tabs.

**Description:** Displays the entry description.

**Entry Creation Date:** (Not available with a Summary View) Displays the date that the entry was created.

**Entry Creator:** (Not available with a Summary View) Displays who created the entry.

**Entry Creator and Creation Date:** (Not available with a Summary View) Displays who created the entry and when they created it.

**Entry Workflow:** Displays the workflow process, the state of the workflow process, and any actions to be performed on the workflow.

**Remote Application:** (Not available with a Summary View) Enables you to add custom applications that are running on a separate server.

For more information on remote applications, see [Chapter 12, “Managing Remote Applications,”](#) on page 151.

**Replies:** All replies to an entry are listed here. You can move this section to another location in the entry view by moving this element.

**Show Only When In Workflow States:** Enables you to hide elements from being displayed on the entry view unless the entry is in a designated state of a workflow.

**Title:** Displays the title of the entry.

## 9.5 Understanding Layout Options

Layout options can enhance the presentation of your forms and views.

When you are adding layout options, remember that when you add layout options to a form, you need to add the same layout options to the view in order for it to be displayed in the custom form.

You can add the following layout options:

**Box:** Places a box around the specified elements.

**Custom JSP:** Enables you to reference a custom JSP from the Vibe directory.

Custom JSPs must be created by Vibe administrators before you can reference them, as described in [Chapter 10, “Using Custom JSP Files to Enhance Your Vibe Pages,”](#) on page 109.

**Divider:** Displays a horizontal line between elements.

**Expandable Area:** Displays an expandable tree element.

Use this option if your form is exceptionally long.

**Fieldset:** Adds a box that can contain other elements.

**HTML:** Adds HTML formatting.

**Three Column Table:** Enables you to add elements within a three-column table.

**Two Column Table:** Enables you to add elements within a two-column table.

# Using Custom JSP Files to Enhance Your Vibe Pages

# 10

Kablink Vibe OnPrem supports the use of custom JavaServer Pages (JSPs) that can help you modify the behavior of certain areas in your Vibe site. For example, your Vibe administrator might enable a custom JSP file that enhances the functionality of Vibe landing pages by enabling users to participate in a survey directly from a workspace landing page.

Before you can leverage the functionality of custom JSP files, your Vibe administrator must first make the files available. Your Vibe administrator will inform you about the names of the files and what they can be used for.

Some areas of Vibe, such as landing pages, enable you to add custom JSP files by default. Other areas, such as folder and workspace forms and views, first require you to do some additional steps, as described in the following sections:

- ♦ [Section 10.1, “Applying JSP Files to a Landing Page,” on page 109](#)
- ♦ [Section 10.2, “Enabling Vibe Forms and Views to Reference JSP Files,” on page 109](#)

## 10.1 Applying JSP Files to a Landing Page

Landing pages can enhance the presentation of your workspaces and folders and increase the accessibility of the information they contain. For more information about landing pages, see [Chapter 6, “Creating and Managing Landing Pages,” on page 49](#).

By default, JSP files can be applied to your Kablink Vibe landing page. For information on how to reference a JSP file from a landing page, see [“Adding a Custom JSP” on page 64](#).

## 10.2 Enabling Vibe Forms and Views to Reference JSP Files

- ♦ [Section 10.2.1, “Applying JSP Files to a Folder Entry Form and View,” on page 109](#)
- ♦ [Section 10.2.2, “Applying JSP Files to a Folder or Workspace View,” on page 110](#)

### 10.2.1 Applying JSP Files to a Folder Entry Form and View

Folder entry forms are used to add folder entries to all types of Kablink Vibe folders. Folder entry views are used to display folder entries in all types of Vibe folders. You can create your own folder entry forms and views, or modify existing forms and views. For more information, see [Chapter 9, “Designing Custom Folder Entry Forms,” on page 97](#).

To enable a folder entry form and view to reference a custom JSP file:

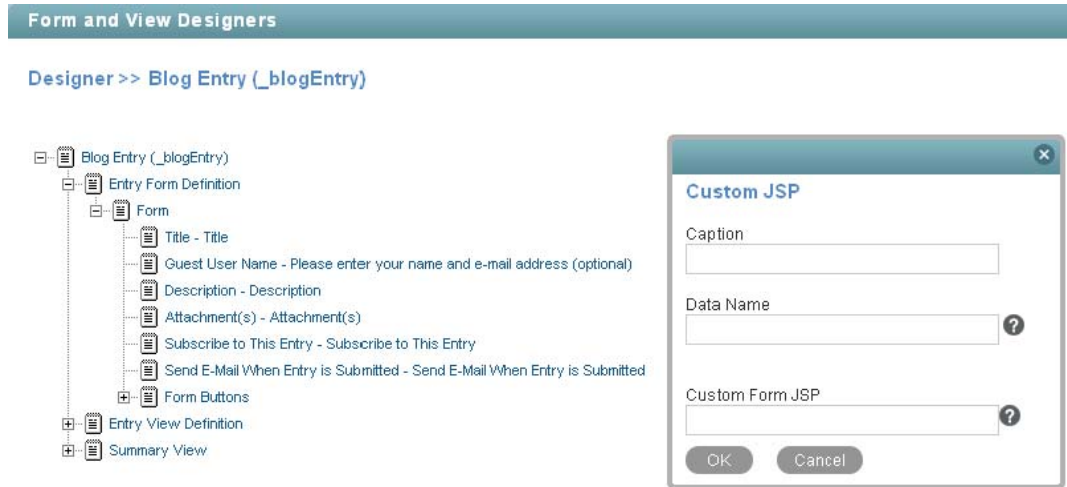
- 1 Create a new custom folder entry form and view, as described in [Section 8.1, “Creating a New Custom Folder View,” on page 87](#).

or

Modify an existing folder entry form and view, as described in [Section 9.3, “Modifying an Existing Entry Form,”](#) on page 104.

Only Vibe administrators have the ability to modify default folder entry forms.

- 2 Add a JSP layout option and element to the folder entry form, as described in [Section 8.1.2, “Adding Elements to the Folder Add/Modify Form,”](#) on page 88.



- 3 Specify the following information:

**Caption:** Specify a name for the custom JSP.

**Data Name:** Specify an internal name for the custom JSP.

**Custom Form JSP:** Specify the filename of the custom JSP file.

You must obtain this filename from your Vibe administrator. Only your Vibe administrator can make JSP files available to be used in the Vibe site.

- 4 Click *OK*.

## 10.2.2 Applying JSP Files to a Folder or Workspace View

Vibe enables you to create custom folder and workspace views. Folder and workspace views define what is displayed on the home page of your folder or workspace. When you create custom folder or workspace views, you can display optional features such as remote applications, attachments, and you can also reference JSP files. For more information, see [Chapter 8, “Creating Custom Folder Views,”](#) on page 87, and [Chapter 7, “Creating Custom Workspace Views,”](#) on page 77.

To enable a folder or workspace view to reference a custom JSP file:

- 1 Create a new custom folder or workspace view, as described in [Section 7.1, “Creating a New Custom Workspace View,”](#) on page 77.

or

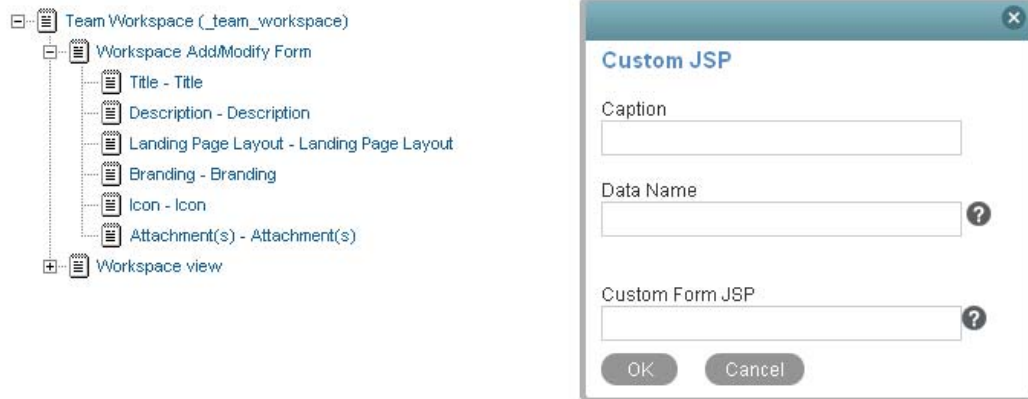
Modify an existing folder or workspace view, as described in [Section 7.2, “Modifying an Existing Workspace View,”](#) on page 82.

Only Vibe administrators have the ability to modify default folder and workspace views.

- 2 Add a JSP layout option and element to the folder or workspace view, as described in [Section 8.1.3, “Adding Elements to the Folder View,” on page 90](#) or [Section 7.1.3, “Adding Elements to the Workspace View,” on page 80](#), depending on whether you are working with a folder or workspace view.

## Form and View Designers

### Designer >> Team Workspace (\_team\_workspace)



- 3 Specify the following information:

**Caption:** Specify a name for the custom JSP.

**Data Name:** Specify an internal name of the custom JSP.

**Custom Form JSP:** Specify the filename of the custom JSP file.

You must obtain this filename from your Vibe administrator. Only your Vibe administrator can make JSP files available to be used in the Vibe site.

- 4 Click *OK*.





# Creating and Managing Workflows

# 11

Kablink Vibe OnPrem enables you to create custom workflows to streamline important business processes. Vibe Administrators can create workflows and implement them across the entire site, and individual folder and workspace owners can create workflows to be used in their respective folders and workspaces.

After you have created a workflow, you can perform the management functions that are described in this section. You can enable workflows to automatically start when certain types of entries are created in the folder, when users comment on or reply to an entry, or you can configure them to be manually started by users who view the entry.

Examples of workflows include approving documents, ordering supplies, hiring new employees, requesting paid time off, and getting expense reimbursements.

- ♦ [Section 11.1, “Creating a Simple Workflow,” on page 113](#)
- ♦ [Section 11.2, “Creating an Advanced Workflow,” on page 120](#)
- ♦ [Section 11.3, “Visually Representing a Workflow,” on page 137](#)
- ♦ [Section 11.4, “Adding Access Controls to a Workflow,” on page 138](#)
- ♦ [Section 11.5, “Downloading Existing Custom Forms and Workflows,” on page 145](#)
- ♦ [Section 11.6, “Workflows Included with Vibe,” on page 145](#)
- ♦ [Section 11.7, “Enabling Workflows,” on page 146](#)
- ♦ [Section 11.8, “Testing A Workflow,” on page 148](#)
- ♦ [Section 11.9, “Importing and Exporting a Workflow,” on page 148](#)

## 11.1 Creating a Simple Workflow

If you have a straightforward business process that you think might benefit from a workflow, you can create a simple workflow to help automate that process, and you don't need in-depth workflow training to do it.

For example, you might want to create a workflow that automates the review process of articles for the company magazine. To create a simple workflow such as this, complete the following sections:

- ♦ [Section 11.1.1, “Creating the Workflow Definition,” on page 113](#)
- ♦ [Section 11.1.2, “Adding Workflow States,” on page 114](#)
- ♦ [Section 11.1.3, “Adding Workflow Start and End States,” on page 115](#)
- ♦ [Section 11.1.4, “Adding Manual Transitions,” on page 116](#)
- ♦ [Section 11.1.5, “Sending E-Mail Notifications,” on page 118](#)
- ♦ [Section 11.1.6, “Enabling Your Workflow for Use,” on page 120](#)

### 11.1.1 Creating the Workflow Definition

- 1 Navigate to the workspace or folder where you want to create the workflow.

You can create workflows at the workspace level or at the folder level. If you create a workflow at the workspace level, that workflow can be applied to all sub-folders and sub-workspaces. If you create a workflow at the folder level, that workflow can be applied only to that folder, and to the folder's sub-folders.

- 2 If you are creating the workflow at the folder level, click *Folder > Form/View Designers* in the Action toolbar.

or

If you are creating the workflow at the workspace level, click *Workspace > Form/View Designers* in the Action toolbar.

The Form and View Designers page is displayed.

- 3 In the Form and View Designers page, click *New > Workflow Processes*.

The Add a New Definition form is displayed.

- 4 Specify the following information:

**Caption:** Specify a name for the workflow process.

This is the name that appears in the Vibe interface. Users see it when they use this workflow. (For example, "Article Production.")

**Name:** Specify the internal name for the workflow process.

The name that you enter in this field is not visible to users who use this workflow. (For example, "article\_production.")

- 5 Click *OK*.
- 6 Continue with [Section 11.1.2, "Adding Workflow States,"](#) on page 114.

## 11.1.2 Adding Workflow States

Workflow states are the phases that a workflow goes through as it completes the business process.

For example, the Article Production workflow contains five states: Article Composition, Peer Review, Edit, Manager Approval, Publish.

- 1 In the Designer page, expand the workflow definition that you created in [Section 11.1.1, "Creating the Workflow Definition,"](#) on page 113.

### Form and View Designers

Marketing  
Designer >> Article Production (article\_production)



- 2 Click *Workflow Process*.
- 3 Click *Add*.
- 4 Click *State*.
- 5 Specify the following information:

**Caption:** Specify a name for the workflow state.

This is the name that appears in the Vibe interface. Users see it when they use this workflow. (For example, “Article Composition.”)

**Name:** Specify the internal name for the workflow state.

The name that you enter in this field is an internal-use database name. Names for elements in a definition must be unique. The first character must be an alphabetic character (a-z, A-Z). For the rest, you can use alphanumeric characters (a-z, A-Z, 0-9), hyphens (-), and underscores (\_).

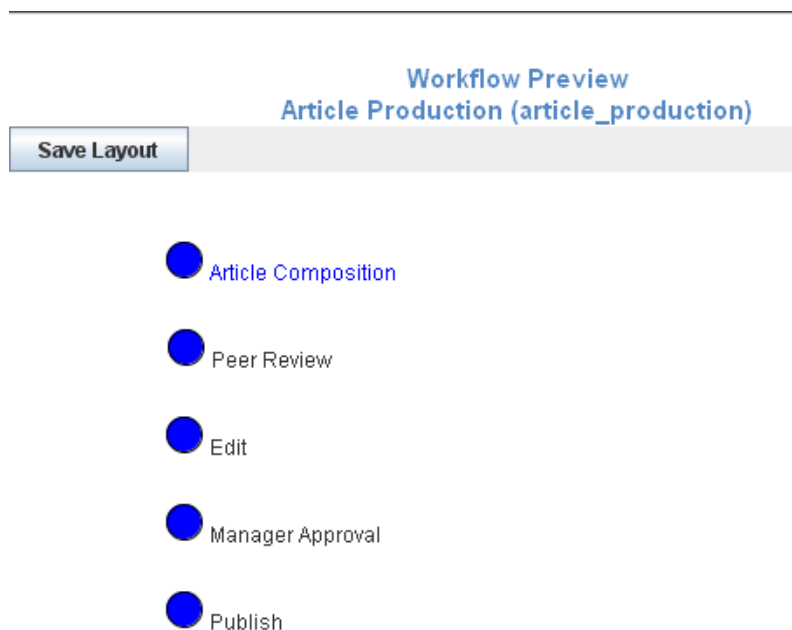
**Description:** Describe the function of the state.

6 Click *OK*.

7 Repeat [Step 2](#) through [Step 6](#) to add additional workflow states.

The new states are added to the workflow and appear in the *Workflow Preview* section at the bottom part of the window.

For more information on the *Workflow Preview* section, see [Section 11.3, “Visually Representing a Workflow,”](#) on page 137.



8 Continue with [Section 11.2.3, “Adding Workflow Start and End States,”](#) on page 122 for information on how you can define start and end states for your workflow.

### 11.1.3 Adding Workflow Start and End States

Vibe enables you to add a Start and End state to your workflow. This is important, because without an End state, a workflow does not officially stop unless you manually stop it. Adding an End state to a workflow automatically stops the workflow when it reaches the final state.

1 Click *Workflow Process*.

2 In the Workflow process window, click *Modify*.

3 Specify the following information:

**Initial State:** Select the Start state of the workflow process.

**End State:** Select the End (final) state of the workflow process.

You can select multiple End states by holding the Ctrl key while clicking additional states.

**Background Actions Will Run in the Context Of:** Select either *Entry Owner* or *Folder Owner*.

4 Click *OK*.

In the *Workflow Preview* section, the Start state is marked with yellow, and the End state is marked with red.

For more information on the *Workflow Preview* section, see [Section 11.3, “Visually Representing a Workflow,”](#) on page 137.



5 Continue with [Section 11.1.4, “Adding Manual Transitions,”](#) on page 116 for information on how you can create transitions that move an entry from one workflow state to the next.

## 11.1.4 Adding Manual Transitions

After you have defined the workflow states, you need to create transitions that move an entry from one state to the next. The easiest kind of transitions to implement are manual transitions.

Manual transitions provide a drop-down list in the entry that allows the user to choose when to transition the entry. The workflow creator decides which workflow states the user can select in the drop-down list.

For example, from the “Article Composition” state, the workflow creator might allow the user to transition the entry to either the “Peer Review” or the “Edit” state.

To create manual transitions from one workflow state to the next workflow state:

1 Expand *Workflow Process*, then expand the workflow state where you want to transition the entry from.

For this example, expand the “Article Composition” state.



**2** Click *Transitions*, then click *Add* in the *Transitions* box in the right section of the Designer page.

**3** Click *Manual Transition*.

For information regarding the other transition types available, see [Section 11.2.4, “Adding Transitions,”](#) on page 123.

**4** In the *To State* select box, select the next state in the workflow.

This is the state that users will be allowed to transition the entry to.

**5** Click *OK*.

Repeat [Step 2](#) through [Step 5](#) if you want to allow users to select from multiple states.

**6** Repeat this procedure for all other states in the workflow.

In the *Workflow Preview* section, you see a diagram representing all of your workflow states (circles) and transitions (arrows).

For more information on the *Workflow Preview* section, see [Section 11.3, “Visually Representing a Workflow,”](#) on page 137.

## Workflow Preview Article Production (article\_production)

Save Layout



7 Continue with [Section 11.1.5, “Sending E-Mail Notifications,”](#) on page 118.

### 11.1.5 Sending E-Mail Notifications

Now that you have added your workflow states and specified how the entry will transition through those states, you need to set up notifications that inform Vibe users when they need to take action on the entry as it moves into a state corresponding with their area of expertise.

For example, Julio composes an article for the company magazine. After he composes the article, he transitions the entry to the next workflow state, Peer Review. Anne, Julio’s co-worker, then receives an e-mail message notifying her that an article is ready for her to review. After Anne reviews the article, she transitions it to the next workflow state, Edit, and so forth.

1 Expand the workflow definition, then click the workflow state where you want the notification to be sent.

For example, click *Peer Review*.

2 Click *Add*.

3 Click *On Entry*.

4 In the On Entry box, click *OK*.

5 Click *On Entry*. (This is located underneath the workflow state where you just created it.)

In the *On Entry* box, you can select from many options. These are actions that you can choose to perform when the entry enters this workflow state, such as moving the entry to another location, copying the entry, or sending notifications. For this basic workflow example, simply select to send e-mail notifications.

For information about all of the options that you can choose to perform when an entry enters a workflow state, see [Section 11.2.6, “Adding On-Entry or On-Exit Events,”](#) on page 129.

6 Click *Add > Notifications*.

**7** In the *Notifications* box, specify the following information:

**Entry Creator:** Select this option if you want to send a notification to the user who created the entry.

**Team:** Select this option if you want to send a notification to the entire team.

**Users:** Specify individual users to whom you want to send a notification.

**Groups:** Specify groups to whom you want to send a notification.

**Additional E-Mail Addresses to Notify:** Specify an e-mail address where you want a notification to be sent.

**Select an Entry Type:** Use the drop-down list to select the type of entry that most closely represents the type of entry that is going through the workflow.

**Text to be Put in the Notification Subject Line:** Specify the text that you want to appear in the subject line of the notification that is sent.

For example, `Peer Review Needed`.

You can use certain HTML constructs to provide specific information about the entry that is transitioning through the workflow. For example, you can populate the Notification Subject Line with the entry title and who last modified the entry: `Workflow notification for {{vibe:title}} from {{vibe:modifiedBy}}`.

For more information about all the HTML constructs you can use, see [Appendix B, “Using HTML Markup in Vibe OnPrem,” on page 179](#).

**Append the Entry Title:** (Optional) Select this option if you want the entry title to appear after the text in the subject line.

**Text to be Put in the Notification Body:** Specify text that you want to appear in the main body of the e-mail notification. You can also select *Append the Entry Body* if you want the main body of the entry to display with the e-mail notification message.

Any text formatting that you use in this field needs to be done in the HTML format. Following are some examples of HTML formatting:

- ◆ `<i></i>` for italics
- ◆ `<b></b>` for bold
- ◆ `<br>` for a break (return/enter)
- ◆ `<p></p>` for a new paragraph

`<a href="www.example.com" ></a>` for links to URLs

You can use certain HTML constructs to provide specific information about the entry that is transitioning through the workflow. For example, you can populate the Notification Body with the name of the user who last modified the entry: `This entry was last modified by {{vibe:modifiedBy}}`.

For more information about all the HTML constructs you can use, see [Appendix B, “Using HTML Markup in Vibe OnPrem,” on page 179](#).

**Append the Entry Description:** (Optional) Select this option if you want the main body of the entry to display with the e-mail notification message.

**8** Click *OK*.

**9** Repeat this process for every workflow state that needs an e-mail notification message.

## 11.1.6 Enabling Your Workflow for Use

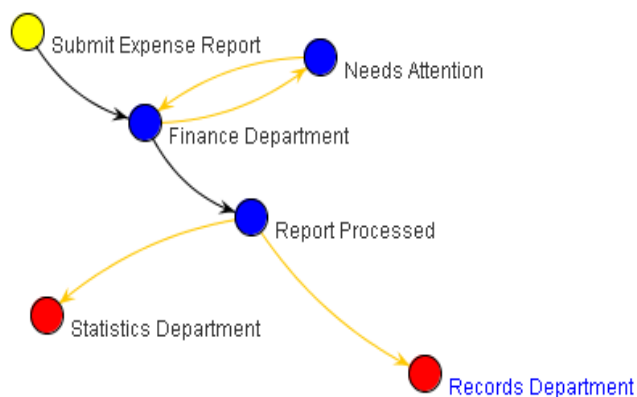
Now that you have created your workflow, you need to enable it. For information on how to do this, see [Section 11.7, “Enabling Workflows,”](#) on page 146.

## 11.2 Creating an Advanced Workflow

This section expands the workflow design presented in [Section 11.1, “Creating a Simple Workflow,”](#) on page 113.

For example, you might want to create a workflow that automates the expense reporting process for your department.

**Figure 11-1** *Advanced Workflow Example*



To create this and other advanced workflows, complete the following sections:

- ◆ [Section 11.2.1, “Creating the Workflow Definition,”](#) on page 120
- ◆ [Section 11.2.2, “Adding Workflow States,”](#) on page 121
- ◆ [Section 11.2.3, “Adding Workflow Start and End States,”](#) on page 122
- ◆ [Section 11.2.4, “Adding Transitions,”](#) on page 123
- ◆ [Section 11.2.5, “Setting Up Transition Types,”](#) on page 125
- ◆ [Section 11.2.6, “Adding On-Entry or On-Exit Events,”](#) on page 129
- ◆ [Section 11.2.7, “Setting Up On-Entry and On-Exit Events,”](#) on page 130
- ◆ [Section 11.2.8, “Adding a Parallel Workflow Thread,”](#) on page 132
- ◆ [Section 11.2.9, “Chaining Workflows,”](#) on page 133
- ◆ [Section 11.2.10, “Adding a Question to a Workflow,”](#) on page 133
- ◆ [Section 11.2.11, “Enabling Your Workflow for Use,”](#) on page 137

### 11.2.1 Creating the Workflow Definition

- 1 Navigate to the workspace or folder where you want to create the workflow.



You can create workflows at the workspace level or at the folder level. If you create a workflow at the workspace level, that workflow can be applied to any folder or workspace included in the workspace. If you create a workflow at the folder level, that workflow can be applied only to that folder, and to the folder's sub-folders.

- 2 If you are creating the workflow at the folder level, click *Folder > Form/View Designers* in the Action toolbar.

or

If you are creating the workflow at the workspace level, click *Workspace > Form/View Designers* in the Action toolbar.

The Form and View Designers page is displayed.

- 3 In the Form and View Designers page, click *New > Workflow Processes*.

The Add a New Definition form is displayed.

- 4 Specify the following information:

**Caption:** Specify a name for the workflow process.

This is the name that appears in the Vibe interface. Users see it when they use this workflow. (For example, "Expense Report Workflow.")

**Name:** Specify the internal name for the workflow process.

The name that you enter in this field is not visible to users who use this workflow. (For example, "expense\_report\_workflow.")

- 5 Click *OK*.
- 6 After you define a workflow, you need to add states to your workflow. For information on how to do this, continue with [Section 11.2.2, "Adding Workflow States,"](#) on page 121.

## 11.2.2 Adding Workflow States

Workflow states are the phases that a workflow goes through as it completes the business process.

For example, the Expense Report workflow contains six states: Submit Expense Report, Finance Department, Needs Attention, Report Processed, Statistics Department, and Records Department.

- 1 In the Designer page, expand the workflow definition that you created in [Section 11.2.1, "Creating the Workflow Definition,"](#) on page 120.



- 2 Click *Workflow Process*.
- 3 Click *Add*.
- 4 Click *State*.

**5** Specify the following information:

**Caption:** Specify a name for the workflow state.

This is the name that appears in the Vibe interface. Users see it when they use this workflow. (For example, “Article Composition.”)

You can use alphanumeric characters (a-z, A-Z, 0-9), dashes (-), underscores (\_), and spaces.

**Name:** Specify the internal name for the workflow state.

The name that you enter in this field is an internal-use database name. Names for elements in a definition must be unique. The first character must be an alphabetic character (a-z, A-Z). For the rest, you can use alphanumeric characters (a-z, A-Z, 0-9), hyphens (-), and underscores (\_).

**Description:** Describe the function of the state.

**6** Click *OK*.

**7** Repeat [Step 2](#) through [Step 6](#) to add additional workflow states.

The new states are added to the workflow and appear in the *Workflow Preview* section located in the bottom part of the window.

For more information on the *Workflow Preview* section, see [Section 11.3, “Visually Representing a Workflow,”](#) on page 137.



**8** After you have added states to your workflow, you need to define the Start and End states. For information on how to do this, see [Section 11.2.3, “Adding Workflow Start and End States,”](#) on page 122.

### 11.2.3 Adding Workflow Start and End States

Vibe enables you to add Start and End states to your workflow. This is important, because without an End state, a workflow does not officially stop unless you manually stop it. Adding an End state to a workflow automatically stops the workflow when it reaches the final state.

**1** Click *Workflow Process*.

2 In the Workflow process window, click *Modify*.

3 Specify the following information:

**Initial State:** Select the Start state of the workflow process.

**End State:** Select the End (final) state of the workflow process.

You can select multiple End states by holding the Ctrl key while clicking additional states.


**Background Actions Will Run in the Context Of:** Select either *Entry Owner* or *Folder Owner*.

4 Click *OK*.

In the *Workflow Preview* section, Start states are marked with yellow, and End states are marked with red.


For more information on the *Workflow Preview* section, see [Section 11.3, “Visually Representing a Workflow,”](#) on page 137.

 Submit Expense Report

 Needs Attention

 Finance Department

 Report Processed

 Statistics Department

 Records Department

5 Continue with [Section 11.2.4, “Adding Transitions,”](#) on page 123 for information on how to create transitions that move an entry from one state to the next.

## 11.2.4 Adding Transitions

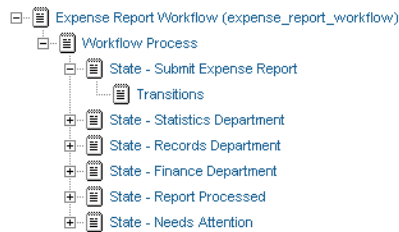
After you have defined the workflow states, you need to create transitions that move an entry from one workflow state to the next.

1 Expand *Workflow Process*, then expand the workflow state that you want to transition the entry from.

For this example, expand the “Submit Expense Report” state.

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Designer &gt;&gt; Expense Report Workflow (expense\_report\_workflow)



- 2 Click *Transitions*, then click *Add* in the *Transitions* box in the right section of the Designer page.
- 3 Click the type of transition that you want to add.

**Custom Transition:** Use this transition if you want to integrate an external process with a Vibe workflow. To do this, consult with your Vibe administrator.

For example, you might want to synchronize a Vibe workflow with an external workflow. You can write some custom Java code and use a custom transition to accomplish this.

**Immediate Transition:** The entry is immediately transitioned.

**Manual Transition:** Provides a drop-down list in the entry that allows the user to choose when to transition the entry. The workflow creator decides which workflow states the user can select in the drop-down list.

**Transition After Time Elapsed:** The entry is transitioned to the next workflow state after a specified amount of time.

**Transition on Comment or Reply:** The entry is transitioned to the next workflow state after a user makes a comment or a reply on the entry.

**Transition on Entry Data Values:** The entry is transitioned to a new state based on the value that a user specifies for a custom element in the entry.

For example:

- ♦ If you want to assign an entry to a specific state based on a value the user selects, you define a custom element with multiple values from which a user can make a selection (from a drop-down list on the form). Map each of these values to specific states in the initial workflow state by using the *Transition on Entry Data Values* option. This option is useful for assigning help tickets in a help desk, assigning entries to the appropriate review contact, and so on.
- ♦ If you want to transition an entry at a specific time, you can transition the entry based on a custom date element.

**Transition on Modify:** The entry is transitioned to a new state when it is modified.

This can be useful for review purposes.

**Transition on Response:** Allows you to transition an entry to a new state based on a response to a question in the entry. Map each possible answer to a workflow question to one of these transitions by using the *Data name* for each *Workflow response*.

For specific instructions on how to do this, see [Section 11.2.10, “Adding a Question to a Workflow,” on page 133.](#)

**Transition on a Variable:** You can make decisions based on the value of a variable that you set. For example, you could have a process that sends e-mail notifications when it enters a state. The process re-enters that same state later in the process, but you do not want to send the notifications more than once. Set up that first state so that it sends notifications only if the “sent notifications” variable is not true.

**Wait for Parallel Thread(s) to End:** Allows you to transition an entry to a new state when one or more specified parallel workflow threads end.

**4** Specify setup options.

After you select a transition type in [Step 3](#), you must set up the transition. Each transition type requires you to specify different setup options.

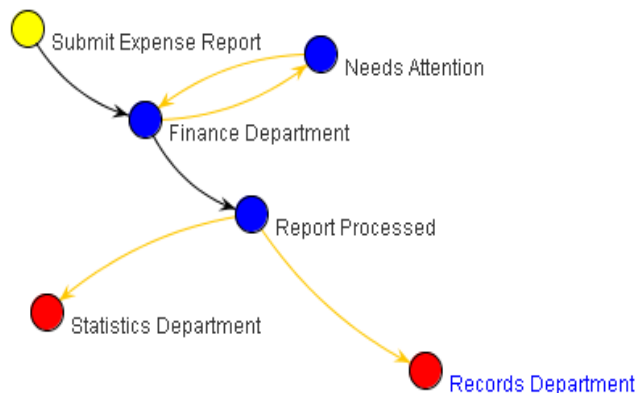
For specific information regarding the information that you need to specify for the individual fields, see [“Setting Up Transition Types” on page 125](#).

**5** Click *OK*.

**6** Repeat [Step 1](#) through [Step 5](#) for all other states in the workflow.

In the *Workflow Preview* section, you see a diagram representing all of your workflow states (circles) and transitions (arrows).

For more information on the *Workflow Preview* section, see [Section 11.3, “Visually Representing a Workflow,” on page 137](#).



**7** After you have set up how entries transition from one workflow state to another in your workflow, you can set up events to occur when the entry enters or exits particular workflow states. For information on how to do this, as well as the kinds of entry and exit events that you can set up, see [Section 11.2.6, “Adding On-Entry or On-Exit Events,” on page 129](#).

## 11.2.5 Setting Up Transition Types

When you choose a specific type of transition, you might need to provide specific information regarding the type of transition that you selected.

Following are the types of transitions that you can choose from, and information describing the fields that you must complete in order to set up each type of transition:

- ♦ [“Custom Transition” on page 126](#)
- ♦ [“Immediate Transition” on page 126](#)

- ◆ “Manual Transition” on page 126
- ◆ “Transition After Time Elapsed” on page 126
- ◆ “Transition on Comment or Reply” on page 127
- ◆ “Transition on Entry Data Values” on page 127
- ◆ “Transition on Modify” on page 127
- ◆ “Transition on Response” on page 127
- ◆ “Transition on a Variable” on page 128
- ◆ “Wait for Parallel Thread(s) to End” on page 129

### Custom Transition

After you begin creating the Custom Transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

**Condition Class Name:** Specify the Java filename where your Vibe administrator created the custom transition.

Consult with your Vibe administrator to get the name of this file.

**To State:** Select the state where you want to transition the entry.

### Immediate Transition

After you begin creating the Immediate Transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

**To State:** Select the state where you want to immediately transition the entry.

### Manual Transition

After you begin creating the Manual Transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

**To State:** Select the state where you want to allow users to transition the entry.

After you create the transition, repeat [Step 2 on page 124](#) through [Step 5 on page 125](#) if you want to allow users to select from multiple states.

You can set access controls on the manual transition to allow only certain users to transition the entry. If you do not set any access controls, the default is to allow all users who have Write access to the entry to transition the entry. For more information about how to set access controls on the manual transition, see [Section 11.4.3, “Setting Access Controls on a Manual Transition,” on page 143](#).

### Transition After Time Elapsed

After you begin creating the Transition After Time Elapsed transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

Numbers entered in the following fields must be whole values. Decimal points and fractions are not valid.

**Days:** Specify how many days to wait before the transition.

**Hours:** Specify how many hours to wait before the transition.

**Minutes:** Specify how many minutes to wait before the transition.

**To State:** Select the state where you want to transition the entry after the elapsed time that you specified.

### Transition on Comment or Reply

After you begin creating the Transition on Comment or Reply transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

**To State:** Select the state where you want to transition the entry after a user comments on or replies to the entry.

### Transition on Entry Data Values

After you begin creating the Transition on Entry Data Values transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

**Match Entry Data Values:** Select *Match Any* if only one condition must be met for the entry to transition. Select *Match All* if all conditions must be met before the entry transitions.

**To State:** Select the state where you want to transition the entry.

### Transition on Modify

After you begin creating the Transition on Modify transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

**To State:** Select the state where you want to transition the entry when the entry is modified.

When you are working with a File entry, modifications made to the file also cause the workflow to be transitioned. Modifications to a file include setting the status of the file, incrementing the major version, editing the file note, reverting to a previous version, and deleting the file. For more information about working with File entries, see [“Working with Files in a Folder Entry”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*

### Transition on Response

After you begin creating the Transition on Response transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

**Workflow Question:** Specify the Data Name for the workflow question that you have previously defined.

For information on how to create a workflow question, see [“Creating a Workflow Question” on page 134](#).

**Workflow Response:** Specify the Data Name for the workflow response that you have previously defined.

For information on how to create a workflow response, see [“Creating Answers to a Workflow Question” on page 135](#).

**To State:** Select the state where you want to transition the entry after a user responds to the workflow question.

**The Transition Occurs When:**

- ♦ **As Soon As One Person Answers With This Response:** Transitions the entry immediately after one person responds to the workflow question with the value that is in the *Workflow Response* field in the Transition on Response dialog box.
- ♦ **As Soon As A Majority Have Answered With This Response:** Transitions the entry immediately after a majority of people respond to the workflow question with the value that is in the *Workflow Response* field in the Transition on Response dialog box.
- ♦ **After Everyone Has Responded and All Have Answered With This Response:** Transitions the entry after all responders have responded to the workflow question and all people respond with the value that is in the *Workflow Response* field in the Transition on Response dialog box.
- ♦ **After Everyone Has Responded and Somebody Answered With This Response:**  
Transitions the entry after all responders have responded to the workflow question and at least one person responds with the value that is in the *Workflow Response* field in the Transition on Response dialog box.
- ♦ **After Everyone Has Responded and Not All Have Answered With This Response:**  
Transitions the entry after all responders have responded to the workflow question and at least one person responds with a value that is not in the *Workflow Response* field in the Transition on Response dialog box.
- ♦ **After Everyone Has Responded and a Majority Answered With This Response:**  
Transitions the entry after all responders have responded to the workflow question and the majority of people respond with the value that is in the *Workflow Response* field in the Transition on Response dialog box.

For more information about how to designate specific users to respond to the question, see [“Designating Specific Users to Respond to a Workflow Question” on page 135](#)

**Transition on a Variable**

After you begin creating the Transition on a Variable transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

**Variable Name:** Specify the name of the workflow variable that you want to be read to activate the transition.

You must have already created a workflow variable. You create a workflow variable as an On Entry or On Exit event, as described in [Section 11.2.6, “Adding On-Entry or On-Exit Events,” on page 129](#).

**Variable Value:** Specify the value of the workflow variable that you want to be read to activate the transition.

You must have already created a workflow variable. You create a workflow variable as an On Entry or On Exit event, as described in [Section 11.2.6, “Adding On-Entry or On-Exit Events,” on page 129](#).

**To State:** Select the state where you want to transition the entry.



## Wait for Parallel Thread(s) to End

After you begin creating the Wait for Parallel Thread(s) to End transition as described in [Section 11.2.4, “Adding Transitions,” on page 123](#), you see the following options:

**Parallel Thread Name:** Select the parallel thread that you want to wait for.

**Transition to State:** Select the state where you want to transition the entry after all selected threads have ended.

## 11.2.6 Adding On-Entry or On-Exit Events

You can take action when a process enters or exits a workflow state. For example, when an entry enters (or exits) a workflow state, you can send a notification, begin or end a parallel process, set a variable, and more.

- 1 Navigate to and click the workflow state where you want to set up an event to occur when the entry enters or exits the state.
- 2 Click *Add*.
- 3 Click *On Entry* or *On Exit*, depending on whether you want the event to occur when the entry enters or exits the state.
- 4 In the On Entry (or On Exit) box, click *OK*.
- 5 Click *On Entry* or *On Exit*, depending on whether you are adding an On Entry or On Exit event. (This is located underneath the workflow state where you just created it.)
- 6 Click *Add*.
- 7 Click the type of event that you want to add.

**Copy Entry:** Allows you to copy an entry to a new location in Vibe when it enters or exits a specific state.

**Custom Action:** Use the custom action if you want to integrate an external process (usually contained within a JAR file) with a Vibe workflow. To do this, consult with your Vibe administrator.

For more information about how Vibe administrators can enable JAR files to be used as custom workflow actions, see [“Enabling Custom JAR Files to Be Used on Your Vibe Site”](#) in the [Kablinc Vibe OnPrem 3.1 Administration Guide](#).

**Move Entry:** Allows you to move an entry to a new location in Vibe when it enters or exits a specific state.

**Notifications:** Allows you to notify specific users or groups about an entry when it enters or exits the state.

**Remote Application:** Remote applications communicate with a third-party online application, and send information from that third-party application back into Vibe. You can enable a remote application to start when entries enter or exit a workflow state.

Remote applications need to be set up and configured by your Vibe administrator before you can add them.

**Start a Parallel Workflow Thread:** Allows you to start a parallel workflow when an entry enters or exits a specific state. Parallel workflows are useful if two or more processes need to occur simultaneously. Only when the parallel thread is finished can the main workflow thread proceed.

Before you can start a parallel workflow thread, you first need to create it. For information on how to create a parallel workflow thread, see [Section 11.2.8, “Adding a Parallel Workflow Thread,”](#) on page 132.

**Start a Workflow Process:** Vibe enables you to chain workflows together. When you are creating a workflow (or modifying an existing workflow), you can start an existing workflow process on the workflow you are creating (or modifying). This can speed up the workflow creation process by helping you make use of existing workflows.

Starting an existing workflow process is not the same as starting a parallel workflow thread. Unlike a parallel workflow thread, when you chain workflows together by starting an existing workflow process, there is no way to share variables or states between the two workflows; in other words, there is no physical connection between the two workflows.

**Stop a Workflow Thread:** Allows you to stop a parallel workflow when an entry enters or exits a specific state.

**Workflow Variable:** Defines a variable to be used when transitioning a workflow.

This workflow variable is referenced with the Transition On a Variable transition, as described in [Section 11.2.4, “Adding Transitions,”](#) on page 123.

- 8 Set up the event you selected in [Step 7](#). Each event type requires you to specify different setup options.

For information on what to specify for the individual fields, see [Section 11.2.7, “Setting Up On-Entry and On-Exit Events,”](#) on page 130.

- 9 Click *OK*.
- 10 Repeat this procedure for all other states in the workflow where you want to set up on-entry or on-exit events.
- 11 Set up access controls on the workflow. For information on how to do this, see [Section 11.4, “Adding Access Controls to a Workflow,”](#) on page 138.

## 11.2.7 Setting Up On-Entry and On-Exit Events

After you add an event to a workflow, you need to provide information to set up the event.

- ♦ [“Copy Entry”](#) on page 130
- ♦ [“Custom Action”](#) on page 131
- ♦ [“Move Entry”](#) on page 131
- ♦ [“Notifications”](#) on page 131
- ♦ [“Remote Applications”](#) on page 132
- ♦ [“Start a Parallel Workflow Thread”](#) on page 132
- ♦ [“Start a Workflow Process”](#) on page 132
- ♦ [“Stop a Workflow Thread”](#) on page 132
- ♦ [“Workflow Variable”](#) on page 132

### Copy Entry

**Select the Destination Folder:** Select the folder where you want to copy the entry to.

**Selected Folder:** Displays the destination folder that you selected.

## Custom Action

**Action Class Name:** Specify the name of the custom action that your Vibe administrator has set up.

Work with your Vibe administrator for information on what you should put in this field.

For more information about how Vibe administrators can enable JAR files to be used as custom workflow actions, see “[Enabling Custom JAR Files to Be Used on Your Vibe Site](#)” in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

## Move Entry

**Select the Destination Folder:** Select the folder where you want to move the entry to.

**Selected Folder:** Displays the destination folder that you selected.

## Notifications

**Entry Creator:** Select this option if you want to send a notification to the user who created the entry.

**Team:** Select this option if you want to send a notification to the entire team.

**Users:** Specify individual users to whom you want to send a notification.

**Groups:** Specify groups to whom you want to send a notification.

**Select an Entry Type:** Use the drop-down list to select the type of entry that most closely represents the type of entry that is going through the workflow.

**Text to be Put in the Notification Subject Line:** Specify the text that you want to appear in the subject line of the notification that is sent.

For example, `Peer Review Needed`.

**Append the Entry Title:** (Optional) Select this option if you want the entry title to appear after the text in the subject line.

**Text to be Put in the Notification Body:** Specify text that you want to appear in the main body of the e-mail notification. You can also select *Append the Entry Body* if you want the main body of the entry to display with the e-mail notification message.

Any text formatting that you use in this field needs to be done in the HTML format. Following are some examples of HTML formatting:

- ♦ `<i></i>` for italics
- ♦ `<b></b>` for bold
- ♦ `<br>` for a break (return/enter)
- ♦ `<p></p>` for a new paragraph

`<a href="www.example.com" ></a>` for links to URLs

**Append the Entry Body:** (Optional) Select this option if you want the main body of the entry to display with the e-mail notification message.

## Remote Applications

**Remote Application:** From the drop-down list, select the remote application.

Remote applications need to be set up and enabled by your Vibe administrator before you can use them. For more information about remote applications, see [Chapter 12, “Managing Remote Applications,”](#) on page 151.

**Variable Name:** Specify the name of the variable to contain the results that are returned by the remote application.

**Execute Action in the Context Of:** Select who you want the remote application to be in relation to: *Active User, Entry Owner, or Folder Owner.*

## Start a Parallel Workflow Thread

**Parallel Thread Name:** Select the parallel workflow thread that you want to start.

You must have already created the parallel workflow thread in order for it to be displayed in this list.

For information on how to create a parallel workflow thread, see [Section 11.2.8, “Adding a Parallel Workflow Thread,”](#) on page 132.

## Start a Workflow Process

**Workflow Process:** From the drop-down list, select the workflow process that you want to start.

## Stop a Workflow Thread

**Parallel Thread Name:** Select the workflow thread that you want to stop.

## Workflow Variable

**Variable Value:** Specify the name of the workflow variable.

**Variable Name:** Specify the value of the workflow variable. This is the name that is referenced internally.

## 11.2.8 Adding a Parallel Workflow Thread

Vibe workflows support parallel workflow threads, which enable you to start a second workflow inside of an existing workflow. Parallel workflows are useful if two or more processes need to occur simultaneously. The main workflow is dependent on the parallel workflow thread; only when the parallel thread is finished can the main workflow thread proceed.

To create a parallel workflow thread:

- 1 Click *Workflow Process*.
- 2 Click *Add > Parallel Workflow Thread*.
- 3 Specify the following information:

**Caption:** Specify a name for the parallel workflow thread.

This is the name that appears in the Vibe interface, that users see when they use this workflow thread.

**Data Name:** Specify the internal name for the parallel workflow thread.

The name that you enter in this field is not visible to users who use this workflow thread.

**Start State:** Select the first state in the parallel workflow thread.

**End State:** Select the last state in the parallel workflow thread.

4 Click *OK*.

The parallel workflow thread is created.

For information on how to start and stop a parallel workflow thread after you have created it, see [Section 11.2.6, “Adding On-Entry or On-Exit Events,” on page 129](#).

## 11.2.9 Chaining Workflows

Vibe enables you to chain workflows together by starting a workflow process inside of a workflow that you are creating (or modifying). This can speed up the workflow creation process by helping you make use of existing workflows.

Starting an existing workflow process is not the same as starting a parallel workflow thread. Unlike a parallel workflow thread, when you chain workflows together by starting an existing workflow process, there is no way to share variables or states between the two workflows; in other words, there is no physical connection between the two workflows.

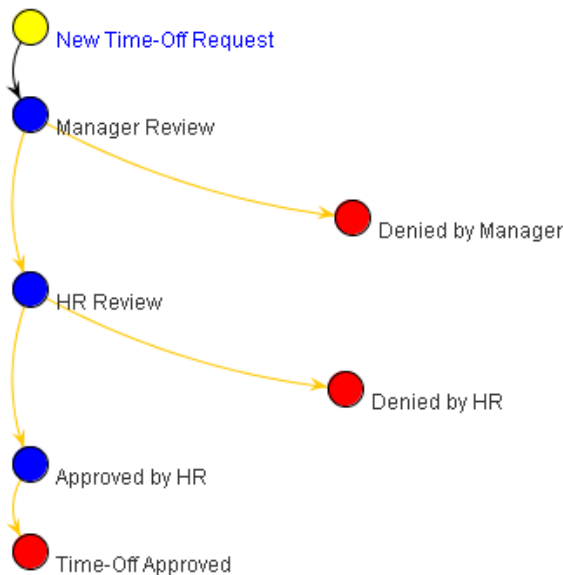
You chain workflows by adding an On Entry or On Exit option to the workflow state where you want to add the existing workflow process. Use the On Entry or On Exit option to add the existing workflow process, as described in [Section 11.2.6, “Adding On-Entry or On-Exit Events,” on page 129](#).

## 11.2.10 Adding a Question to a Workflow

Workflow questions can enhance the ease and usability of workflows. For example, imagine a Time-Off Request workflow where a manager can respond to a request by simply selecting *Yes* or *No* in the workflow.

In the following example, if the manager selects *Yes*, the workflow is transferred to the next state of the workflow, *HR Approval*. If the manager selects *No*, the request is denied and the workflow is ended.

**Figure 11-2** Workflow Question Layout



- ♦ [“Creating a Workflow Question” on page 134](#)
- ♦ [“Creating Answers to a Workflow Question” on page 135](#)
- ♦ [“Designating Specific Users to Respond to a Workflow Question” on page 135](#)
- ♦ [“Creating Transitions” on page 136](#)
- ♦ [“Setting Access Controls on a Workflow Question” on page 137](#)

## Creating a Workflow Question

- 1 Click the workflow state where you want to add the workflow question.

A workflow question can be specific to a single state (each state can have only one associated question), or you can define a global question, which you can then associate with any number of states. Global questions are useful when multiple states require the same question and answer set.

- 2 Click *Add > Workflow Question*.

- 3 Specify the following information:

**Question Text:** Specify the question that you want to appear in the workflow.

For example, Approve time-off request?

**Data Name:** Specify the internal name for the workflow question.

This name must be unique because it is the name that you use to refer to the workflow question in future steps. For example, approve\_timeoff\_request.

- 4 Click *OK*.

- 5 Continue with [“Creating Answers to a Workflow Question” on page 135](#).

## Creating Answers to a Workflow Question

- 1 Click *Workflow Question*.

This is the question that you created in [“Creating a Workflow Question”](#) on page 134.

### Form and View Designers

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#### Designer >> Time Off Request (time\_off\_request)



- 2 Click *Add > Workflow Response*.

- 3 Specify the following information:

**Response Text:** Specify a single response option.

For example, Yes.

**Data Name:** Specify the internal name for the workflow response.

For example, yes.

- 4 Click *OK*.

- 5 Repeat [Step 1](#) through [Step 4](#) to create multiple answers to the same workflow question.

Users using this workflow can choose from the answers that you create.

You can designate specific users as responders to the workflow question, as described in [“Designating Specific Users to Respond to a Workflow Question”](#) on page 135.

## Designating Specific Users to Respond to a Workflow Question

When you designate specific users as responders to a workflow question, you can configure the workflow to transition only after all responders have answered the workflow question, or only after all responders have answered the workflow question correctly. For more information, see [“Transition on Response”](#) on page 127.

- 1 Click *Workflow Question*.

This is the question that you created in [“Creating a Workflow Question”](#) on page 134.

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Designer >> Time Off Request (time\_off\_request)



- 2 Click *Add > Responders*.

The Responders dialog box is displayed.

- 3 In the provided form, specify which users or groups of users you want to specify as responders to the workflow question:

**Folder Default Access:** Select this option to specify all users who have access to the folder as responders.

**Entry Creator:** Select this option to specify the user who created the entry as a responder.

**Team:** Select this option to specify the team as responders.

**Users:** Specify individual users to whom you want to specify as responders.

**Groups:** Specify groups to whom you want to specify as responders.

**Select an Entry Type:** Select the type of entry that most closely represents the type of entry that is going through the workflow.

**Select Elements within the Entry:** Enables you to select elements that are contained in the entry. Users associated with that element are granted access.

For example, if you select *Task Entry* in the *Select an Entry Type* drop-down list, the options that you can select in the *Select Elements within the Entry* are *Assigned to*, *Assigned to Groups*, *Assigned to Teams*.

- 4 Click *OK*.

## Creating Transitions

Now that you have created the workflow question and workflow answers, you need to create transitions that correspond to the answers that you created. This kind of transition is called “Transition on Response.”

For information on how to create a “Transition on Response” transition, see [Section 11.2.4, “Adding Transitions,”](#) on page 123.



## Setting Access Controls on a Workflow Question

If you want to add access controls to this workflow question, you must use the Transition Out of This State access control setting. For more information, see [Section 11.4, “Adding Access Controls to a Workflow,”](#) on page 138.

### 11.2.11 Enabling Your Workflow for Use

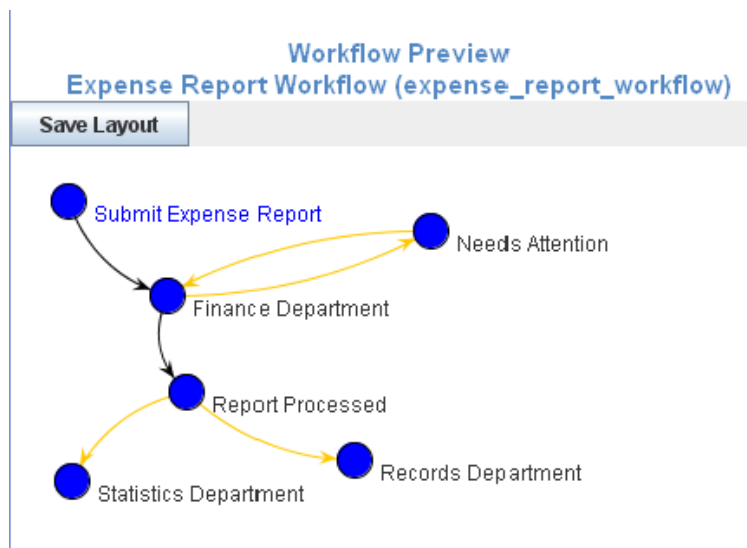
Now that you have created your workflow, you need to enable it. For information on how to do this, see [Section 11.7, “Enabling Workflows,”](#) on page 146.

## 11.3 Visually Representing a Workflow

Kablink Vibe enables you to view a visual representation of your workflow, making the creation process easier by allowing you to envision the workflow in every step of its development.

As you create your workflow in the *Designer* section, the changes you make are automatically added to the *Workflow Preview* section below.

**Figure 11-3** Workflow Preview Section



You can modify the workflow layout in the *Workflow Preview* section. You must save the layout after you have modified it.

- ◆ [Section 11.3.1, “Modifying a Workflow Layout,”](#) on page 138
- ◆ [Section 11.3.2, “Saving a Workflow Layout,”](#) on page 138

### 11.3.1 Modifying a Workflow Layout

You can easily modify the visual representation of a workflow. Modifying the workflow layout can make it easier to understand how a workflow process works because it can enable you to better visualize the process.

- 1 In the *Workflow Preview* section, click a workflow state and drag the state to the desired location.

Transition arrows automatically adjust to the new locations of the workflow states.

### 11.3.2 Saving a Workflow Layout

By default, every time you make a change in the *Designer* section when you create a workflow, any changes that you previously made in the *Workflow Preview* section are reverted to the state when you last saved.

To save your layout in the *Workflow Preview* section:

- 1 Click *Save Layout* after you have modified your workflow layout.

Now, when you make changes in the *Designer* section, the changes that you previously made to your workflow layout in the *Workflow Preview* section are retained.

## 11.4 Adding Access Controls to a Workflow

Kablink Vibe enables you to set access controls on workflows that you create. You can set access controls on an entire workflow, or on the individual states of a workflow.

- ♦ [Section 11.4.1, “Setting Access Controls on an Entire Workflow,” on page 138](#)
- ♦ [Section 11.4.2, “Setting Access Controls on Individual States of a Workflow,” on page 141](#)
- ♦ [Section 11.4.3, “Setting Access Controls on a Manual Transition,” on page 143](#)

### 11.4.1 Setting Access Controls on an Entire Workflow

- 1 In the Designer page, expand the workflow definition that you created in [Section 11.2.1, “Creating the Workflow Definition,” on page 120](#).

Form and View Designers

Marketing

Designer >> Expense Report Workflow (expense\_report\_workflow)

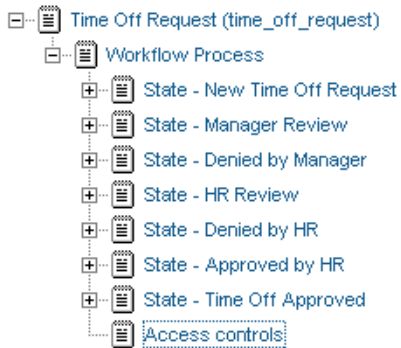


- 2 Click *Workflow Process*.
- 3 Click *Add > Access controls*.

- 4 Click *OK*.
- 5 Expand *Workflow Process*, then click *Access controls*.

## Form and View Designers

### Marketing Designer >> Time Off Request (time\_off\_request)



- 6 Click *Add*.
- 7 Click the access control setting that you want to add.

**Delete Access:** Enables you to grant specific users rights to delete entries as they transition through the workflow process.

**Modify Access:** Enables you to grant specific users rights to modify entries as they transition through the workflow process.

**Modify Specified Fields:** Enables you to grant rights to individual users or groups that allow the specified users or groups to modify specific fields within an entry as the entry transitions through the workflow.

**Read Access:** Enables you to grant specific users rights to read entries as they transition through the workflow process.

**Transition Into This State:** Enables you to grant specific users rights to transition entries into any state in the workflow.

**Transition Out of This State:** Enables you to grant specific users rights to transition entries out of any state in the workflow.

This is the access control setting that determines who can see a workflow question. If you are adding a workflow question to your workflow or to an individual state, as described in [Section 11.2.10, “Adding a Question to a Workflow,” on page 133](#), and you want to add access controls to determine who sees the question, you must use this access control setting.

- 8 Define the access control setting that you added in [Step 7](#) by specifying the following information in the provided form:

**Folder Default Access:** Select this option to grant access to all users who have access to the folder.

**Entry Creator:** Select this option to grant access to the user who created the entry.

**Team:** Select this option to grant access to the team.

**Users:** Specify individual users to whom you want to grant access.

**Groups:** Specify groups to whom you want to grant access.

**Select an Entry Type:** Select the type of entry that most closely represents the type of entry that is going through the workflow.

**Select Elements within the Entry:** Select the fields that are contained within the selected entry type that you want to allow specific users or groups to modify.

Access control rights can be granted only for the User List, Group List, and List elements. By default, only calendar entry types and task entry types contain these elements. For Calendars, this is the *Attendee*, *Attendee Groups*, and *Attendee Teams* fields. For tasks, this is the *Assigned to*, *Assigned to Groups*, and *Assigned to Teams* fields.

For information about how to add these elements to existing entry types, or how to create your own custom entry types where you can add these elements, see [Chapter 9, “Designing Custom Folder Entry Forms,”](#) on page 97.

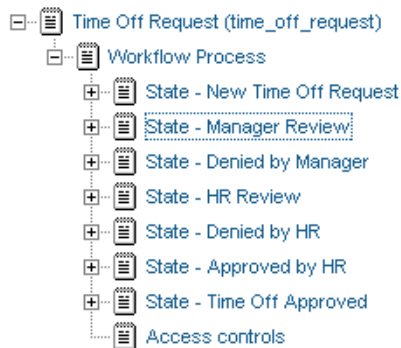
9 Click *OK*.

## 11.4.2 Setting Access Controls on Individual States of a Workflow

- 1 In the Designer page, expand the workflow definition that you created in [Section 11.2.1, “Creating the Workflow Definition,”](#) on page 120.
- 2 Expand *Workflow Process*, then click the state where you want to add the access controls.

### Form and View Designers

#### Marketing Designer >> Time Off Request (time\_off\_request)



- 3 Click *Add > Access controls*.
- 4 Click *OK*.
- 5 Expand the state where you just added the access controls, then click *Access controls*.
- 6 Click *Add*.
- 7 Click the access control setting that you want to add.

**Delete Access:** Enables you to grant specific users rights to delete entries when they are in this workflow state.

**Modify Access:** Enables you to grant specific users rights to modify entries when they are in this workflow state.

**Modify Specified Fields:** Enables you to grant specific users rights to modify specific fields within an entry as they transition through the workflow.

**Read Access:** Enables you to grant specific users rights to read entries when they are in this workflow state.

**Transition Into This State:** Enables you to grant specific users rights to transition entries into this state.

This setting is relevant only when a manual transition is defined involving this state.

**Transition Out of This State:** Enables you to grant specific users rights to transition entries out of this state.

This setting is relevant only when a manual transition is defined involving this state.

- 8 Define the access control setting that you added in [Step 7](#) by specifying the following information in the provided form:

**Folder Default Access:** Select this option to grant access to users who have access to the folder.

**Entry Creator:** Select this option to grant access to the user who created the entry.

**Team:** Select this option to grant access to the team.

**Users:** Specify individual users to whom you want to grant access.

**Groups:** Specify groups to whom you want to grant access.

**Select an Entry Type:** Select the type of entry that most closely represents the type of entry that is going through the workflow.

**Select Elements within the Entry:** Select the fields that are contained within the selected entry type that you want to allow specific users or groups to modify.

Access control rights can be granted only for the User List, Group List, and List elements. By default, only calendar entry types and task entry types contain these elements. For Calendars, this is the *Attendee*, *Attendee Groups*, and *Attendee Teams* fields. For tasks, this is the *Assigned to*, *Assigned to Groups*, and *Assigned to Teams* fields.

For information about how to add these elements to existing entry types, or how to create your own custom entry types where you can add these elements, see [Chapter 9, “Designing Custom Folder Entry Forms,”](#) on page 97.

- 9 Click *OK*.

### 11.4.3 Setting Access Controls on a Manual Transition

- 1 In the Designer page, expand the workflow definition that you created in [Section 11.2.1, “Creating the Workflow Definition,”](#) on page 120.
- 2 Expand *Workflow Process*, expand the state that contains the manual transition where you want to set the access controls, expand *Transitions*, then click *Manual Transition*.

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#### Designer >> Article Production (article\_production)



- 3 Click *Add > Manual Transition Access Controls*.

- 4 In the provided form, specify which users or groups of users who you want to grant access to transition the entry:

**Folder Default Access:** Select this option to grant access to users who have access to the folder.

**Entry Creator:** Select this option to grant access to the user who created the entry.

**Team:** Select this option to grant access to the team.

**Users:** Specify individual users to whom you want to grant access.

**Groups:** Specify groups to whom you want to grant access.

**Select an Entry Type:** Select the type of entry that most closely represents the type of entry that is going through the workflow.

**Select Elements within the Entry:** Select the fields that are contained within the selected entry type that you want to allow specific users or groups to modify.

Access control rights can be granted only for the User List, Group List, and List elements. By default, only calendar entry types and task entry types contain these elements. For Calendars, this is the *Attendee*, *Attendee Groups*, and *Attendee Teams* fields. For tasks, this is the *Assigned to*, *Assigned to Groups*, and *Assigned to Teams* fields.



For information about how to add these elements to existing entry types, or how to create your own custom entry types where you can add these elements, see [Chapter 9, “Designing Custom Folder Entry Forms,”](#) on page 97.

5 Click *OK*.

## 11.5 Downloading Existing Custom Forms and Workflows

The Novell Vibe Resource Library provides a collection of existing Vibe folder entry forms and workflows that have been designed to solve specific business problems. You can easily download the custom forms and workflows, then import them into your Vibe environment. You can further customize these forms and workflows to suit your individual business needs.

- 1 Navigate to the [Novell Vibe Resource Library Web site](http://www.novell.com/products/teaming/resource-library/) (<http://www.novell.com/products/teaming/resource-library/>).
- 2 In the *Forms and Workflows* tab, select the custom form or workflow that you want to use in your Vibe environment.
- 3 In the *Attachment* section, click the zip file to download it.
- 4 Import the file into your Vibe environment and deploy it for use.

For information on how to do this, follow the [Novell Vibe Resource Library Deployment Instructions](http://www.novell.com/communities/node/8359/deployment-instructions) (<http://www.novell.com/communities/node/8359/deployment-instructions>).

## 11.6 Workflows Included with Vibe

Kablink Vibe includes three predefined workflows. One is available for you to enable and use; the others are used within Vibe.

- ♦ [Section 11.6.1, “Available Workflows,”](#) on page 145
- ♦ [Section 11.6.2, “Internal Workflows,”](#) on page 146

### 11.6.1 Available Workflows

Vibe currently includes the Publish workflow, which is functional as soon as you enable it, as described in [Section 11.7, “Enabling Workflows,”](#) on page 146.

You can use the Publish workflow in the following ways:

**Publish Entries to a Landing Page:** You can use the Publish workflow to publish entries to a landing page, without manually modifying the contents of the landing page.

For more information, see [Section 6.7, “Automatically Displaying the Newest Folder Entries on Your Landing Page,”](#) on page 69.

**Keep Entries Private:** You can use the Publish workflow to keep entries private until you are ready to publish them for other Vibe users to read.

For example, you can associate the Publish workflow with a certain entry type in a folder (see [Section 11.7.1, “Enabling Workflows to Start When an Entry Is Created,”](#) on page 147 for more information). When you create an entry in the folder, the entry is created as Private. When you are ready for other Vibe users to view the entry, you can change the workflow status to Publish.

To transition the workflow status of an entry from Private to Publish:

- 1 Open the entry, and in the *Transition to* field, select *Publish* in the drop-down list.
- 2 Click *OK*.

To make the workflow status of the entry Private again:

- 1 Open the entry where you want to change the workflow status.
- 2 In the Entry toolbar, click *Workflow > Stop Workflow: Publish Workflow*, then click *OK* when you are asked if you really want to stop the workflow.
- 3 In the Entry toolbar, click *Workflow > Start Workflow: Publish Workflow*, then click *OK* when you are asked if you really want to start the workflow.

The workflow status of the entry is now Private.

## 11.6.2 Internal Workflows

Vibe includes two workflows that are used internally.

- ♦ [“Task Workflow” on page 146](#)
- ♦ [“Calendar Workflow” on page 146](#)

### Task Workflow

Vibe uses the Task workflow internally to allow all users who are assigned to a particular task to make modifications to the task, if they are not members of the workspace where the task resides.

This workflow should not be manually added to any workspace or folder.

### Calendar Workflow

Vibe uses the Calendar workflow internally to allow all users who are attendees in an event to make modifications to the calendar event, if they are not members of the workspace where the event resides.

This workflow should not be manually added to any workspace or folder.

## 11.7 Enabling Workflows

After a workflow is created, you can enable the workflow to automatically start when certain types of entries are created in the folder, or when users comment on or reply to entries. Or, you can enable users to manually start workflows when they view the entry.

Before you can enable a workflow, the workflow must first be created. For information on how to create a workflow, see either [Section 11.1, “Creating a Simple Workflow,” on page 113](#) or [Section 11.2, “Creating an Advanced Workflow,” on page 120](#), depending on the type of workflow that you want to create.

You can enable workflows only in folders for which you have appropriate rights. When you enable a workflow in a folder, it is automatically enabled on all sub-folders and sub-workspaces, and can be applied to all entries that are created in that folder and its sub-folders.

- ♦ [Section 11.7.1, “Enabling Workflows to Start When an Entry Is Created,” on page 147](#)
- ♦ [Section 11.7.2, “Enabling Workflows to Start When Users Comment on or Reply to an Entry,” on page 147](#)
- ♦ [Section 11.7.3, “Allowing Users to Manually Start Workflows,” on page 148](#)

## 11.7.1 Enabling Workflows to Start When an Entry Is Created

You can enable a workflow to automatically start on all entries that are created in a specific folder, whenever an entry is created. This is called “associating workflows with entries.”

- 1 Navigate to the folder where you want to enable the workflow.
- 2 Click *Folder > Configure* in the Action toolbar.

The Configure Default Settings page is displayed.

- 3 In the *Workflows Associations* section, in the *Entry Types* section, click the drop-down list next to the entry type that you want to associate the workflow with, then select the desired workflow.

To add workflows to this drop-down list, you need to create them. After workflows have been created at this folder level, or at a higher workspace level, they appear in this list. For information on how to create workflows, see either [Section 11.1, “Creating a Simple Workflow,” on page 113](#) or [Section 11.2, “Creating an Advanced Workflow,” on page 120](#), depending on the type of workflow that you want to create.

- 4 Click *Apply > Close*.

Now, when this type of entry is created in this folder, Vibe automatically starts the workflow by placing the entry in the initial state of the workflow process that you specified.

When you enable a folder to support multiple entry types, you can associate workflows to the specific types of entries. For example, if you have a folder that supports both file entries and calendar entries, you can have one kind of workflow start when you create a file entry, and another kind of workflow start when you create a Calendar entry. For information on how to enable multiple entry types in a single folder, see [Section 3.2.1, “Enabling Alternate Folder Entry Types,” on page 26](#).

## 11.7.2 Enabling Workflows to Start When Users Comment on or Reply to an Entry

You can enable a workflow to automatically start when users comment on or reply to an entry. This is called “associating workflows with comments or replies.”

- 1 Navigate to the folder where you want to enable the workflow.
- 2 Click *Folder > Configure* in the Action toolbar.

The Configure Default Settings page is displayed.

- 3 In the *Workflows Associations* section, in the *Comment or Reply Types* section, click the drop-down list next to the comment or reply type that you want to associate the workflow with, then select the desired workflow.

To add workflows to this drop-down list, you need to create them. After workflows have been created at this folder level, or at a higher workspace level, they appear in this list. For information on how to create workflows, see either [Section 11.1, “Creating a Simple Workflow,” on page 113](#) or [Section 11.2, “Creating an Advanced Workflow,” on page 120](#), depending on the type of workflow that you want to create.

- 4 Click *Apply > Close*.

Now, when this type of comment or reply is made to an entry in this folder, Vibe automatically starts the workflow by placing the entry in the initial state of the workflow process that you specified.

### 11.7.3 Allowing Users to Manually Start Workflows

You can allow users to decide if they want to start a workflow on an entry, and if they do, at what point they want to start the workflow. Also, you can give users the option to choose among multiple workflows for each entry.

- 1 Navigate to the folder where you want to enable users to start the workflows.

- 2 Click *Folder > Configure* in the Action toolbar.

The Configure Default Settings page is displayed.

- 3 In the *Allowed Workflows* section, select the workflows that you want to allow users to choose from.

The *Local Definitions* section in the *Allowed Workflows* section displays all of the workflows that you have created locally. The other workflows listed in the *Allowed Workflows* section were either created by your Vibe administrator, by another user at a higher level in the workspace tree, or are included with the Vibe product.

- 4 Click *Apply > Close*.

Now, when users create entries in this folder, they can start and stop workflows as they desire. For information on how to start and stop a workflow, see [“Using Workflows”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

## 11.8 Testing A Workflow

To test a workflow, simply create the workflow in a testing workspace and ensure that it works according to your specifications. When the workspace is ready to be deployed in a production environment, export the workflow, then import it into the production workspace where you want to deploy it.

For information on how to import and export a workflow, see [Section 11.9, “Importing and Exporting a Workflow,” on page 148](#).

## 11.9 Importing and Exporting a Workflow

Kablink Vibe enables you to import and export workflows into and out of Vibe.

- ♦ [Section 11.9.1, “Importing a Workflow,” on page 149](#)
- ♦ [Section 11.9.2, “Exporting a Workflow,” on page 149](#)

## 11.9.1 Importing a Workflow

- 1 Navigate to the workspace where you want to import the workflow.
- 2 Click *Workspace > Form/View Designers* in the Action toolbar.
- 3 Click *Import*.  
The Import Definitions page is displayed.
- 4 Click *Browse*.
- 5 Browse for and select the workflow that you want to import.
- 6 Click *OK > Close*.

## 11.9.2 Exporting a Workflow

- 1 Navigate to the workspace where you created the workflow.
- 2 Click *Workspace > Form/View Designers*.
- 3 Click *Export*.  
The Export Definitions page is launched.
- 4 Expand *Workflow Processes*, then select the workflow that you want to export.
- 5 Click *OK*.
- 6 Select the location where you want to save the workflow, then save it.



# Managing Remote Applications

# 12

Remote applications communicate with a third-party, online application, and send information from the third-party application back into Kablink Vibe OnPrem.

For example, your Vibe administrator could create a remote application for Twitter that displays all of your Twitter entries in Vibe.

Remote applications are vastly customizable, and are set up by your Vibe administrator. Talk with your Vibe administrator if you have a request for a new remote application.

This section describes how to set up remote applications after they have already been created and enabled by your Vibe administrator.

- ♦ [Section 12.1, “Adding Remote Applications to Views and Forms,” on page 151](#)
- ♦ [Section 12.2, “Setting Up a Remote Application,” on page 152](#)
- ♦ [Section 12.3, “Setting Up Multiple Remote Applications on a Single Page,” on page 154](#)
- ♦ [Section 12.4, “Managing Access Controls for Remote Applications,” on page 155](#)

## 12.1 Adding Remote Applications to Views and Forms

Kablink Vibe enables you to add a Remote Application element to a folder or workspace view or a custom form. The Remote Application element is a drop-down list that enables users of the view or form to select from a list of remote applications. This is useful if the current view or form does not allow you to select a remote application to run; it is also useful if you want to run multiple remote applications in a single view or form. (For specific information on configuring a view or form to run multiple remote applications, see [Section 12.3, “Setting Up Multiple Remote Applications on a Single Page,” on page 154.](#))

Unless you are the Vibe administrator, you can perform the following procedure only on custom views and forms for which you have appropriate rights. You can create custom views and forms for workspaces, folders, or entries, as described in [Chapter 7, “Creating Custom Workspace Views,” on page 77](#), [Chapter 8, “Creating Custom Folder Views,” on page 87](#), and [Chapter 9, “Designing Custom Folder Entry Forms,” on page 97](#).

To add a Remote Application element to a view or form:

- 1 Navigate to the workspace or folder where you want to add the Remote Application element.  
If you want to add the Remote Application element to a form, navigate to the workspace or folder where the form was created.
- 2 Click *Workspace > Form/View Designers* if the form was created at the workspace level.  
or  
Click *Folder > Form/View Designers* if the form was created at the folder level.  
The Form and View Designers page is displayed.



- 3 Click the entry definition, folder view, or workspace view where you want to add the Remote Application element.
- 4 Add the Remote Application element to the desired folder view, workspace view, or entry definition, as described in the following sections:

**Folder View:** [Section 8.1.2, “Adding Elements to the Folder Add/Modify Form,” on page 88.](#)

**Workspace View:** [Section 7.1.2, “Adding Elements to the Workspace Add/Modify Form,” on page 78.](#)

**Entry Definition (Form):** [Section 9.2.2, “Adding Elements to the Entry Form Definition,” on page 99.](#)

## 12.2 Setting Up a Remote Application

- [Section 12.2.1, “Setting Up a Remote Application in a Workspace,” on page 152](#)
- [Section 12.2.2, “Setting Up a Remote Application as an Accessory,” on page 152](#)

### 12.2.1 Setting Up a Remote Application in a Workspace

- 1 Navigate to the workspace or folder where you want to display the remote application.
- 2 Click *Workspace > Edit Workspace*, or *Folder > Edit Folder*.
- 3 In the *Remote Application* section, click the drop-down list and select the remote application that you want to enable.
- 4 Click *OK*.

The remote application is displayed at the top of the folder or workspace.

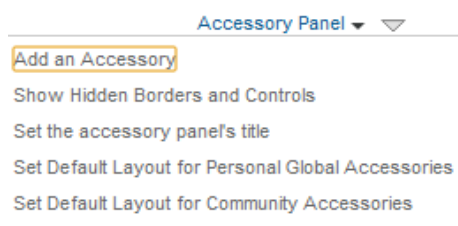
### 12.2.2 Setting Up a Remote Application as an Accessory

Kablink Vibe allows you to set up remote applications as accessories. You might want to do this if you want to view more than one remote application on a single Vibe page.

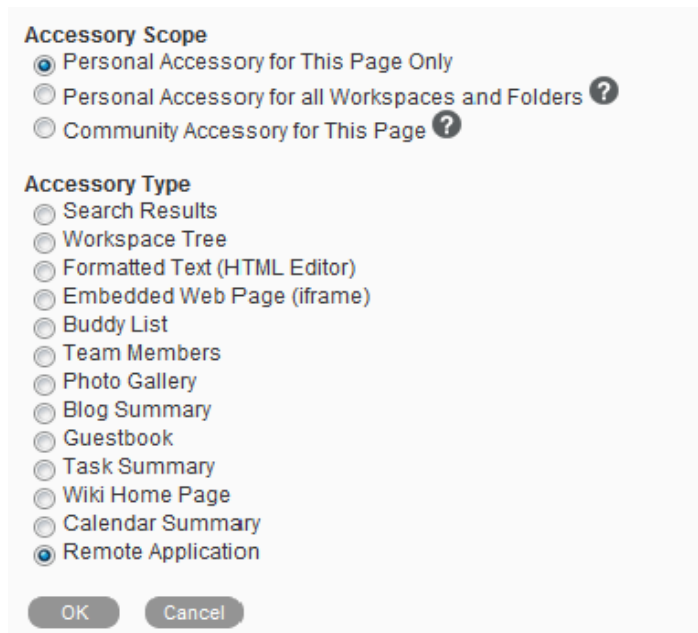


This section describes how to create an accessory that references a remote application.

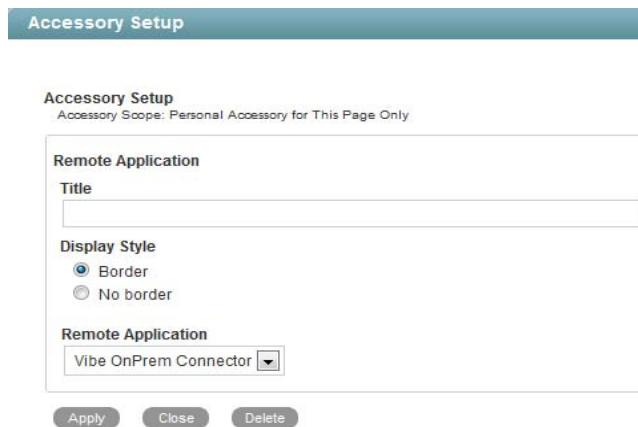
- 1 Navigate to the page where you want to create the Remote Application accessory.
- 2 Locate the Accessory Panel, then click *Accessory Panel*.



- 3 Click *Add an Accessory*.



- 4 Select the scope of the accessory you want to create, then select *Remote Application*.
- 5 Click *OK*.



- 6 Specify a title for the accessory, then use the *Remote Application* drop-down menu to select the remote application that you want to add.
- 7 Click *Apply > Close*.  
The new accessory is displayed.

## 12.3 Setting Up Multiple Remote Applications on a Single Page

You can use either of the following methods to set up multiple remote applications on a single Workspace or Folder.

- ♦ [Section 12.3.1, “Launching a Remote Application as an Accessory,” on page 154](#)
- ♦ [Section 12.3.2, “Creating a New Workspace or Folder View That Supports Multiple Remote Applications,” on page 154](#)

### 12.3.1 Launching a Remote Application as an Accessory

If you want to view more than one remote application on a single Kablink Vibe page, you can set up one remote application in your workspace, and then you can view subsequent remote applications as accessories.

For more information on viewing remote applications as accessories, see [Section 12.2.2, “Setting Up a Remote Application as an Accessory,” on page 152](#).

### 12.3.2 Creating a New Workspace or Folder View That Supports Multiple Remote Applications

If you don't want your remote application to be displayed as an accessory, but you still want to enable multiple remote applications on a single page, you can accomplish this by creating a new view for the workspace or folder where you want the remote applications to be displayed, and then configuring the workspace or folder to support the new view.

- ♦ [“Creating the New View” on page 154](#)
- ♦ [“Configuring the Workspace or Folder to Support the New View” on page 155](#)
- ♦ [“Using the New View to Enable a Remote Application” on page 155](#)

#### Creating the New View

- 1 In the Workspace or Folder where you want to enable additional remote applications, click *Workspace > Form/View Designers* or *Folder > Form/View Designers*.  
The Form and View Designers page is launched.
- 2 Click *New > Folder Views* or *Workspace Views*, depending on whether you are working in a workspace or folder.
- 3 Provide a caption and a name for the new definition.
- 4 Select the type of workspace for which you want to create the new definition.
- 5 Click *OK*.
- 6 Click the *Workspace Add/Modify Form* link.

- 7 In the box on the right side of the page, click *Add*.
- 8 In the *Form Elements* section, click *Remote Application*.
- 9 Provide a caption and a name for the new remote application field that you're creating.  
The text that you enter in the *Caption* field is what the remote application field is called in the workspace or folder form.
- 10 Click *OK*.
- 11 Click *Close* to exit the Form and View Designer.

### Configuring the Workspace or Folder to Support the New View

- 1 Navigate to the workspace or folder where you want to implement the new definition that you created in [“Creating the New View” on page 154](#).
- 2 Click *Workspace > Configure* or *Folder > Configure*.
- 3 In the *Default View* section, select the new definition that you created in [“Creating the New View” on page 154](#).
- 4 Click *Apply > Close*.

### Using the New View to Enable a Remote Application

Now that you have created the new definition and configured the workspace or folder to support it, you need to enable the additional remote application.

To enable the additional remote application, see [Section 12.2, “Setting Up a Remote Application,” on page 152](#).

## 12.4 Managing Access Controls for Remote Applications

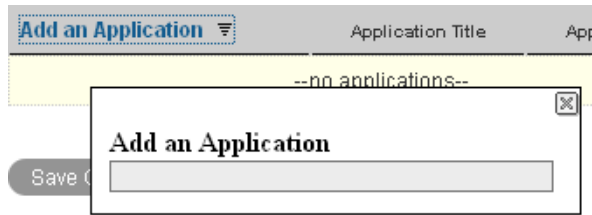
Because not all remote applications can be completely trusted, it is often a good idea to limit the privileges of the remote application. Because Kablink Vibe administrators are responsible for creating and enabling the remote application for the Vibe site, they are also responsible for setting up access controls on the remote application.

Before you modify the access control settings of remote applications for a specific workspace or folder, you should consult with your Vibe administrator to ensure that what you plan to do is safe.

When an application is restricted to a specific role, the application can use Web services to perform only those tasks that are allowed for that role. For example, the Participant role can create new entries, modify entries that the user created, add comments to entries, and so on. Participants cannot perform system administration tasks and cannot modify other users' entries.

To limit the remote application to privileges assigned to a specific role:

- 1 Navigate to the folder or workspace where you want to set the access control settings on the remote application.
- 2 Click *Workspace > Access Control* or *Folder > Access Control*.
- 3 On the Configure Access Control page, click *Add an Application*.



- 4 In the *Add an Application* field, use type-to-find functionality to specify and select the application that you want to add.
- 5 Close the *Add an Application* panel by clicking the X in the upper right corner.
- 6 In the access control table, select the check box that is located in the row of the remote application that you just added, and the column of the role that you want to assign to the application.

Add an Application	Application Title	Application Name	Workspace Creator	Participant	Team Member
	Hello World	helloworld	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save Changes

- 7 Click *Save Changes > Close*.

The application that you added is now restricted to those operations allowed for the role that you selected. For example, if you assigned the Participant role to the remote application, then the inheritance of workspace and folder access controls means that it is very likely that most workspaces and folders inherit this setting. Assuming that all places inherited this setting, the most powerful role the remote application can assume within the installation is that of a Participant.

If you are not sure what access control settings to assign to a particular remote application, consult with your Vibe administrator.

If your Vibe administrator has enabled multiple applications for your site, some of these applications might be grouped together in an Application Group. Application Groups are similar to groups that contain usernames. Application groups contain the names of registered applications. After your Vibe administrator defines application groups, you as a workspace and folder owner can assign access-control roles to groups of applications instead of assigning roles to one application at a time.

# Managing Your Data Quota

# 13

Data quotas can be enabled by your Kablink Vibe OnPrem administrator in order to limit the amount of data that is stored on the Vibe site. For information on how the Vibe administrator can enable data quotas, see [“Managing Disk Space Usage with Data Quotas”](#) in the *Kablink Vibe OnPrem 3.1 Administration Guide*.

If data quotas have been enabled on your Vibe site, you need to understand what counts toward your data quotas, the different kinds of data quotas that exist, and how you can view the current data usage so you can know when you are approaching the allotted data quota. If you meet your allotted quota, Vibe enables you to purge files and attachments that you have previously deleted.

- ◆ [Section 13.1, “Understanding Data Quotas,” on page 157](#)
- ◆ [Section 13.2, “Viewing Your Data Quota,” on page 158](#)
- ◆ [Section 13.3, “Setting a Data Quota for Workspaces and Folders,” on page 160](#)
- ◆ [Section 13.4, “Adding Files and Attachments to the Vibe Site When You Are Over Your Quota,” on page 161](#)
- ◆ [Section 13.5, “E-Mailing Files and Attachments to the Vibe Site When You Are Over Your Quota,” on page 161](#)
- ◆ [Section 13.6, “Adding Files Through WebDAV When You Are Restricted by a Data Quota,” on page 161](#)
- ◆ [Section 13.7, “Working with File Versions When You Are Restricted by a Data Quota,” on page 161](#)
- ◆ [Section 13.8, “Making Disk Space Available by Purging Deleted Items,” on page 162](#)

## 13.1 Understanding Data Quotas

Only files and attachments count toward your data quota. Workspaces, folders, and entries that do not contain files and attachments do not count toward your data quota. Files and attachments must be deleted and purged in order to make more disk space available.

The Kablink Vibe OnPrem administrator can enable two kinds of data quotas:

- ◆ User data quotas
- ◆ Workspace and folder data quotas

The administrator can enable one of these quotas, or both of them.

- ◆ [Section 13.1.1, “Understanding User Data Quotas,” on page 157](#)
- ◆ [Section 13.1.2, “Understanding Workspace and Folder Data Quotas,” on page 158](#)

### 13.1.1 Understanding User Data Quotas

User data quotas limit the amount of data individual users can add to the Vibe site. Any files and attachments that you add to the Vibe site counts toward your data quota, regardless of the folders or workspaces where you add them.

## 13.1.2 Understanding Workspace and Folder Data Quotas

Workspace and folder quotas limit the amount of data that can be stored in individual workspaces and folders.

Sub-workspaces and sub-folders that have a data quota are subject to their own data quota as well as any data quotas that exist on parent folders and workspaces. For example, consider a workspace that has a data quota of 50 MB. The workspace contains two sub-workspaces: Workspace A and Workspace B. Users cannot upload data that is in excess of 50 MB into either of these sub-workspaces. Furthermore, users cannot upload data into both of these sub-workspaces that is in excess of 50 MB (for example, users cannot upload data that is in excess of 30 MB into both sub-workspace, because the amount of combined data for both sub-workspaces is greater than 50 MB).

## 13.2 Viewing Your Data Quota

Data quotas might or might not be in use on your Vibe site. If you are unable to view your data quotas as described in this section, your Vibe administrator has not yet restricted the amount of data that can be added to the Vibe site.

If you have exceeded your allotted data quota, you should purge items that you have previously deleted, as discussed in [Section 13.8, “Making Disk Space Available by Purging Deleted Items,” on page 162](#).

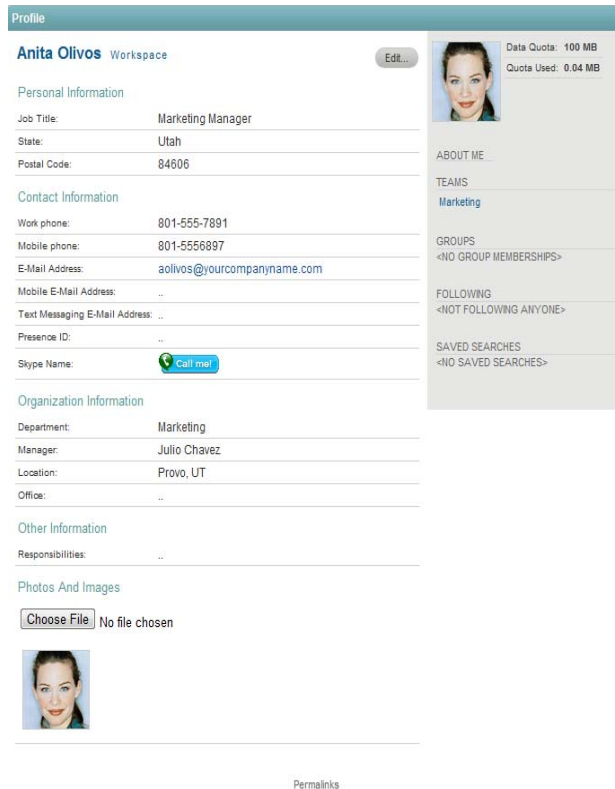
- ♦ [Section 13.2.1, “Viewing Your User Data Quota,” on page 158](#)
- ♦ [Section 13.2.2, “Viewing Your Workspace or Folder Data Quota,” on page 159](#)

### 13.2.1 Viewing Your User Data Quota

If your administrator has set a user data quota and if you are an active contributor to your Kablink Vibe site, you might want to periodically view your current data quota to ensure that you are not approaching the user limit.

To view your current data quota and how much you are currently using:

- 1 Navigate to the home page of your personal workspace.
- 2 Click the *Profile* link, located next to your name.



- 3 Your data quota is displayed in the upper right corner of the Profile page, along with the amount you are currently using.

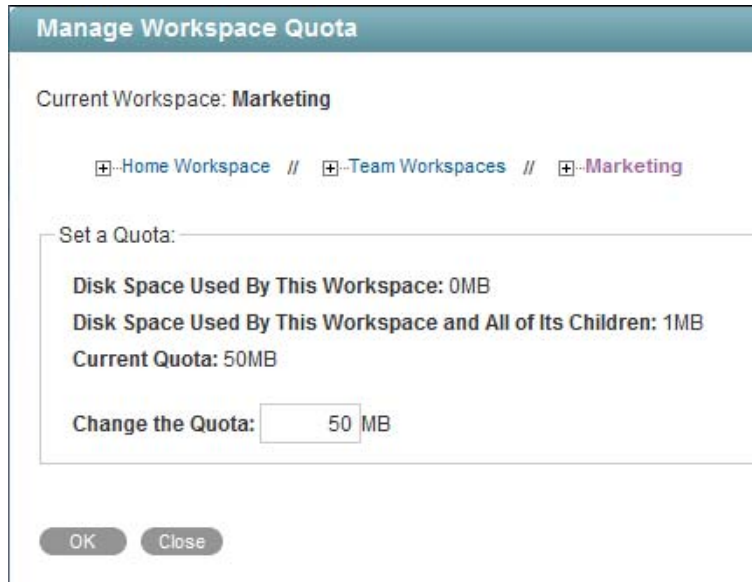
## 13.2.2 Viewing Your Workspace or Folder Data Quota

The Vibe administrator can set a data quota on your workspaces and folders, or the administrator can allow you to set your own data quotas on your own workspaces and folders.

You must be an administrator for the workspace or folder in order to view data quotas.

To view your current workspace or folder quota:

- 1 Navigate to the workspace or folder where you want to view the quota.
  - 2 Click *Workspace > Manage Workspace Quota* if you want to view the quota for a workspace.
- or
- Click *Folder > Manage Folder Quota* if you are managing the quota for a folder.



The following data quota information is displayed for the workspace or folder:

- ♦ **Disk Space Used By This Workspace/Folder:** The amount of disk space the workspace or folder is currently using. This does not include disk space that is being used by sub-workspaces and sub-folders.
- ♦ **Disk Space Used By This Workspace/Folder and All of Its Children:** The amount of disk space that is being used by the workspace or folder and all of its sub-workspaces and sub-folders.
- ♦ **Current Quota:** The current data quota that exists on the workspace or folder.
- ♦ **Lowest Quota on Parent Workspaces or Folders:** The lowest quota that exists on any workspace or folder that is higher in the folder hierarchy than the workspace or folder that you are currently viewing.

Sub-workspaces and sub-folders that have a data quota are subject to their own data quota as well as any data quotas that exist on parent folders and workspaces. For more information, see [Section 13.1.2, “Understanding Workspace and Folder Data Quotas,” on page 158.](#)

- ♦ **Change the Quota:** Enables you to change the data quota for the workspace or folder.

## 13.3 Setting a Data Quota for Workspaces and Folders

The Vibe administrator can allow you to set your own data quotas for your workspaces and folders. If you cannot set a data quota as described in this section, your administrator has not allowed this capability.

If workspace and folder administrators have set data quotas at higher-level workspaces, your workspaces and folders are subject to any quotas that are set on the higher-level workspaces. For example, suppose you are the administrator of a team workspace called “Online Marketing”. This team workspace is a sub-workspace to a workspace called “Marketing”. If the workspace administrator for the Marketing workspace has set a data quota of 100 MB, users in your workspace and in other sub-workspaces to the Marketing workspace cannot upload more than 100 MB of



collective data to the sub-workspaces, regardless of what is set as the data quota for the sub-workspaces. For more information, see [Section 13.1.2, “Understanding Workspace and Folder Data Quotas,”](#) on page 158.

To set a data quota for workspaces and folders:

- 1 Navigate to the workspace or folder where you want to view the quota.
- 2 Click *Workspace > Manage Workspace Quota* if you are managing the quota for a workspace.  
or  
Click *Folder > Manage Folder Quota* if you are managing the quota for a folder.
- 3 In the *Change the Quota* field, specify the new data quota for the workspace or folder, then click *OK*.

## 13.4 Adding Files and Attachments to the Vibe Site When You Are Over Your Quota

If you have exceeded your data quota but you still need to add files and attachments to the Kablink Vibe site, you need to decrease your disk usage by purging files and attachments that you have previously deleted.

For information on how to purge deleted items, see [Section 13.8, “Making Disk Space Available by Purging Deleted Items,”](#) on page 162.

## 13.5 E-Mailing Files and Attachments to the Vibe Site When You Are Over Your Quota

Kablink Vibe enables you to add files and entry attachments to the Vibe site via e-mail, as described in [“Adding Entries to a Folder Via E-Mail”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*. However, if you have met your data quota, you are unable to e-mail entries to Vibe if they include attachments.

If you have exceeded your allotted data quota, you should purge the items that you have previously deleted, as discussed in [Section 13.8, “Making Disk Space Available by Purging Deleted Items,”](#) on page 162.

## 13.6 Adding Files Through WebDAV When You Are Restricted by a Data Quota

When you add files to the Kablink Vibe site through WebDAV, the files still count against your data quota, just as if you had added the files through the regular Vibe interface.

## 13.7 Working with File Versions When You Are Restricted by a Data Quota

Kablink Vibe enables you to create multiple versions of the same file, as described in [“Using Version Control with Files”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

When you edit a document in Vibe, Vibe creates a new version of the file. This new version counts against the data quota of the user who edited the file; it does not count against the quota of the user who originally posted the file. File versions also count against the data quota of individual workspaces and folders.

You can manage your data quota by deleting previous versions of a file that you no longer need. For information about how to delete previous file versions, see “[Deleting Existing Versions of a File](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

---

**IMPORTANT:** When you use OpenOffice to edit a document in Vibe, a new version of the document is created each time you click *Save*. Because each version of a document counts against your data quota, you should save the document only once if you are using OpenOffice as an editor.

When you use Microsoft Office, Vibe creates only one version when you save the document. Clicking *Save* multiple times does not create multiple versions, as is the case when you edit documents with OpenOffice.

---

## 13.8 Making Disk Space Available by Purging Deleted Items

Files and attachments that have been deleted but not yet purged still count toward your data quota. Workspaces, folders, and entries that do not contain files and attachments do not count toward your data quota. If you have reached your allotted data quota, you need to purge deleted files and attachments.

You can purge any item that you have rights to delete.

---

**NOTE:** Purged items cannot be recovered. When you purge items from the Vibe site, remember the following:

- ♦ Purging an entry also purges all attached files, comments, and replies.
- ♦ Purging a folder also purges all entries and sub-folders that are associated with that folder.
- ♦ Purging a workspace also purges all folders, sub-folders, and entries that are associated with that workspace.

- 
- 1 Navigate to the folder or workspace where the deleted item that you now want to purge previously resided.

For example, if you want to purge a file entry that was in your personal Files folder, navigate to the Files folder in your personal workspace.

If you want to see everything that has been deleted in the Vibe site, navigate to the highest level workspace. (By default this is the *Home Workspace* directory.)

- 2 Click the *Trash* icon , located in the Navigation panel.

The Trash page displays all workspaces, folders, and entries that have been deleted in or below the current workspace or folder.

- 3 Select the file entry or any other type of entry that contains an attachment that you want to purge.

- 4 Click *Purge > OK*.

The item is purged from the Vibe site.

# Restoring Deleted Items

# 14

Kablink Vibe OnPrem enables you to undelete a workspace, folder, or entry that you previously deleted, restoring it to its previous location. When you undelete an entry, all associated attachments, comments, and replies are also undeleted.

You cannot undelete an item that has been purged.

- ♦ [Section 14.1, “Rights Associated with Undeletion,” on page 163](#)
- ♦ [Section 14.2, “Undeleting Workspaces, Folders, and Entries,” on page 163](#)
- ♦ [Section 14.3, “Undeleting Mirrored Files,” on page 164](#)
- ♦ [Section 14.4, “Undeleting Items That Contain Workflows,” on page 164](#)
- ♦ [Section 14.5, “Locating Deleted Items,” on page 164](#)

## 14.1 Rights Associated with Undeletion

As a general rule, if you have rights to delete an item in Kablink Vibe, you also have rights to undelete that item.

Remember the following when undeleting:

- ♦ You can undelete an item that another user deleted, if you have appropriate rights.
- ♦ If you have rights to undelete an entry, but do not have rights to undelete the folder that contains the entry, you cannot undelete the entry.
- ♦ If you have rights to undelete a folder, but do not have rights to undelete the workspace that contains the folder, you cannot undelete the folder.
- ♦ When you undelete a folder, the contents of the folder are not automatically undeleted. You need to undelete the contents of the folder separately.
- ♦ When you undelete an entry in a deleted folder, the folder is automatically undeleted. However, if you do not have rights to undelete the folder, you cannot undelete the entry.


## 14.2 Undeleting Workspaces, Folders, and Entries

If you have the appropriate rights, you can undelete any workspace, folder, or entry and restore it to its previous location.

- 1 Navigate to the folder or workspace where the deleted workspace, folder, or entry previously resided.

For example, if you want to restore a Blog folder that was in your personal workspace, navigate to your personal workspace.

If you want to see everything that has been deleted in the Kablink Vibe site, navigate to the highest level workspace. (By default this is the *Home Workspace* directory.)

- 2 Click the *Trash* icon , located in the Navigation panel.

The Trash page displays all workspaces, folders, and entries that have been deleted in or below the current workspace or folder.

3 Select the workspace, folder, or entry that you want to undelete.

4 Click *Restore*.

The workspace, folder, or entry is restored to its previous location.

## 14.3 Undeleting Mirrored Files

Undeleting files that have been deleted through a mirrored folder is not supported in Kablink Vibe. Files that are deleted through a mirrored folder cannot be recovered.

## 14.4 Undeleting Items That Contain Workflows


When you undelete a workspace or folder where a workflow has been created, the workflow is also restored with the workspace or folder.

When you undelete a folder entry where a workflow has been enabled, the entry is restored with the workflow still enabled. The entry is in the same workflow state as it was when it was deleted.

## 14.5 Locating Deleted Items

If you cannot find an item in your Kablink Vibe site that you know was there previously, it has probably been deleted.

To locate the deleted item, you can do either of the following:

- ◆ Perform a search for the deleted item, as described in “[Searching for Deleted Items](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.
- ◆ Navigate to the folder or workspace where the item previously resided, and click the *Trash* icon  located in the Navigation panel, as described in [Section 14.2, “Undeleting Workspaces, Folders, and Entries,”](#) on page 163.

# Using Vibe on Your Mobile Phone

# 15

Mobile access to the Kablink Vibe OnPrem site can be deactivated by your Vibe administrator. If you are unable to access the Vibe mobile interface as described in this section, consult your Vibe administrator.

- ◆ [Section 15.1, “Supported Mobile Devices,” on page 165](#)
- ◆ [Section 15.2, “Browser Requirements,” on page 165](#)
- ◆ [Section 15.3, “Getting Started,” on page 165](#)
- ◆ [Section 15.4, “Supported Features,” on page 167](#)
- ◆ [Section 15.5, “Features that Are Not Supported in the Vibe Mobile Interface,” on page 174](#)
- ◆ [Section 15.6, “Security Considerations,” on page 174](#)
- ◆ [Section 15.7, “Troubleshooting Your Mobile Device,” on page 174](#)

## 15.1 Supported Mobile Devices

The Kablink Vibe mobile interface is supported on the following mobile devices:

- ◆ iPhone
- ◆ BlackBerry
- ◆ Any other mobile device that provides an HTTP/HTML-based interface

Ensure that your device’s browser meets the requirements that are discussed in [Section 15.2, “Browser Requirements,” on page 165](#).

For tablet devices such as the iPad, the default interface is the same as when you access Vibe from your workstation.

## 15.2 Browser Requirements

To use Kablink Vibe from a mobile device, your device’s browser must support:

- ◆ HTML 4
- ◆ JavaScript

## 15.3 Getting Started

Use the following information to help you access Kablink Vibe from your mobile device, and learn basic navigation:

- ◆ [Section 15.3.1, “Accessing the Vibe Mobile Interface,” on page 165](#)
- ◆ [Section 15.3.2, “Navigating to the Home Page of the Mobile Interface,” on page 166](#)

### 15.3.1 Accessing the Vibe Mobile Interface

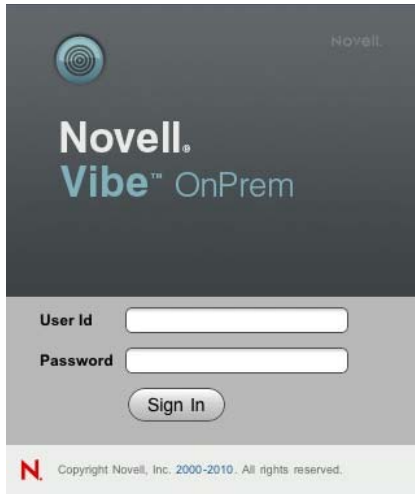
- 1 On your mobile device, launch a Web browser such as Mozilla Firefox or Internet Explorer.

- 2 Specify the URL of your corporation's Vibe site.

For example, `http://host:port`.

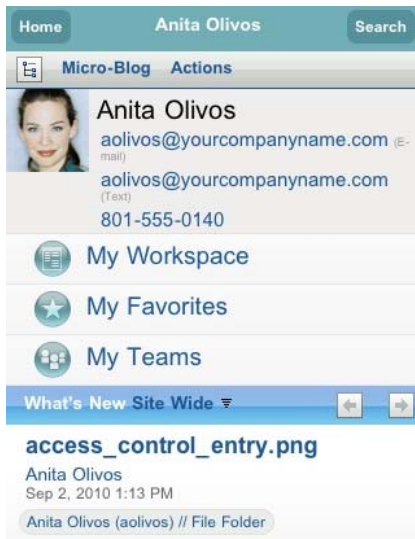
Vibe automatically detects that you are using a mobile device, and directs you to the Vibe mobile interface.

If Vibe displays the regular Vibe interface instead of the mobile interface, add `/mobile` to the end of the Vibe URL, as discussed in “[Your Browser Does Not Automatically Direct You to the Mobile Interface](#)” in “[Troubleshooting](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.



- 3 Specify your username and password, then select *Sign In*.

The mobile home page is displayed.

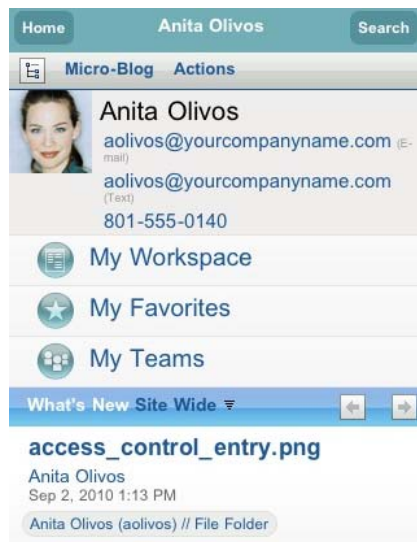


## 15.3.2 Navigating to the Home Page of the Mobile Interface

Regardless of where you are in the Vibe mobile interface, you can easily navigate to the home page.

- 1 Select *Home* in the Navigation toolbar at the top of the mobile interface.

The home page is displayed.



## 15.4 Supported Features

- ♦ [Section 15.4.1, “Searching the Mobile Interface,” on page 167](#)
- ♦ [Section 15.4.2, “Viewing Your Teams,” on page 169](#)
- ♦ [Section 15.4.3, “Viewing Your Favorite Places,” on page 169](#)
- ♦ [Section 15.4.4, “Viewing Your Recent Places,” on page 169](#)
- ♦ [Section 15.4.5, “Viewing File Entries and Attachments,” on page 169](#)
- ♦ [Section 15.4.6, “Viewing YouTube Videos,” on page 169](#)
- ♦ [Section 15.4.7, “Viewing What’s New,” on page 170](#)
- ♦ [Section 15.4.8, “Viewing What’s Unread,” on page 171](#)
- ♦ [Section 15.4.9, “Viewing the Workspace Tree,” on page 171](#)
- ♦ [Section 15.4.10, “Deleting a Folder Entry,” on page 171](#)
- ♦ [Section 15.4.11, “Calling Vibe Users with One Click \(iPhone Only\),” on page 172](#)
- ♦ [Section 15.4.12, “Sending E-Mail,” on page 172](#)
- ♦ [Section 15.4.13, “Following People and Places of Interest,” on page 172](#)
- ♦ [Section 15.4.14, “Transitioning Entries from One Workflow State to Another,” on page 173](#)
- ♦ [Section 15.4.15, “Using Folders,” on page 173](#)

### 15.4.1 Searching the Mobile Interface

The Kablink Vibe mobile interface enables you to search for people, places, entries, and attachments.

Advanced Search is not supported in the mobile interface. However, you can save an advanced search when you access Vibe from your workstation, then use it on your mobile device.

- ♦ [“Performing a Basic Search” on page 168](#)
- ♦ [“Using a Saved Search” on page 168](#)

## Performing a Basic Search

To perform a basic search in the Vibe mobile interface:

- 1 Select *Search* in the Navigation toolbar at the top of the mobile interface.  
The Search drop-down menu is displayed.



- 2 In the drop-down list, select the category for which you want to search.  
You can search for People, Places, or All.
- 3 Select whether you want to search the entire Vibe site, or only the workspace that you currently are in.
- 4 Specify the words or phrases that you want to search for, then select *OK*.  
The Search Results page is displayed.

## Using a Saved Search

Vibe enables you to perform saved searches that you have previously created and saved when accessing the Vibe site from your workstation.

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**TIP:** Even though the Vibe mobile interface does not have an Advanced search, you can create and save an Advanced search when you access the Vibe site from your workstation. You can then use the saved search on your mobile device.

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For information on how to create a saved search, see [“Saving and Reusing Searches”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

For information on how to save an Advanced Search when accessing the Vibe site from your workstation, see [“Using Advanced Search”](#) in the *Kablink Vibe OnPrem 3.1 User Guide*.

To access and use a saved search from the Vibe mobile interface:

- 1 Select *Search* in the Navigation toolbar at the top of the mobile interface.



- 2 In the *Saved Searches* section, select the saved search that you want to run.  
The Search Results page displays the results for your saved search.

## 15.4.2 Viewing Your Teams

You can quickly view all the teams of which you are a member.

- 1 On the home page, select *My Teams*.

## 15.4.3 Viewing Your Favorite Places

You can quickly view your favorite places.

- 1 On the home page, select *My Favorites*.

To add or delete favorites, you must access the Vibe site from your workstation. For more information, see “[Managing Your Favorite Places](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

## 15.4.4 Viewing Your Recent Places

The Vibe mobile interface enables you to quickly view workspaces and folders that you have visited since you last logged in to the current Vibe session.

- 1 Select *Actions > Recent Places*.

## 15.4.5 Viewing File Entries and Attachments

The Vibe mobile interface enables you to view file entries as well as documents that have been attached to entries.

- 1 Navigate to and select the entry that contains the document that you want to view.
- 2 In the *Attachments* section, select *View* next to the document that you want to view.

---

**TIP:** If your mobile device is capable of viewing the file in its native format, you can simply click the file link to view the file.

For example, when you use an iPhone, you can click the file link to view Microsoft Word files, PDF files, and Microsoft Excel files.


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## 15.4.6 Viewing YouTube Videos

The Vibe mobile interface enables you to view YouTube videos that are posted in your Vibe site. However, you cannot use a mobile device to view YouTube videos that are posted in the Branding section of workspaces or folders; the video must be posted within a folder entry or in the Description section of the folder or workspace.

Your BlackBerry or other mobile device might not be properly set up to view YouTube videos. If you are having difficulty viewing YouTube videos from your mobile device, follow the instructions in “[You Are Unable to View YouTube Videos from Your Mobile Device](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

To view a YouTube video from the Vibe mobile interface:

- 1 Navigate to and select the entry that contains the YouTube video that you want to view.
- 2 Click the *YouTube* icon .

You are directed to the mobile YouTube site to view the video.

To post YouTube videos, you must access the Vibe site from your workstation. For more information, see “[Displaying YouTube Videos in a Folder Entry](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.

## 15.4.7 Viewing What’s New

The Vibe mobile interface enables you to see new entries that have been added to the Vibe site.

- ♦ “[Viewing What’s New in Your Teams](#)” on page 170
- ♦ “[Viewing What’s New in Your Followed Places](#)” on page 170
- ♦ “[Viewing What’s New in Your Favorite Places](#)” on page 170
- ♦ “[Viewing What’s New Across the Entire Site](#)” on page 170
- ♦ “[Viewing the Newest Micro-Blog Entries of People You’re Following](#)” on page 170
- ♦ “[Viewing What’s New in a Folder](#)” on page 170
- ♦ “[Viewing What’s New in a Workspace](#)” on page 171

### Viewing What’s New in Your Teams

- 1 From the *What’s New* drop-down list on the home page, select *My Teams*.

### Viewing What’s New in Your Followed Places

- 1 From the *What’s New* drop-down list on the home page, select *All Followed*.

### Viewing What’s New in Your Favorite Places

- 1 From the *What’s New* drop-down list on the home page, select *Favorites*.

### Viewing What’s New Across the Entire Site

- 1 From the *What’s New* drop-down list on the home page, select *Site Wide*.

### Viewing the Newest Micro-Blog Entries of People You’re Following

- 1 From the *What’s New* drop-down list on the home page, select *Micro-Blogs*.

### Viewing What’s New in a Folder

- 1 Navigate to the folder where you want to see new items.
- 2 Select *Actions* > *New in This Folder*.

## Viewing What's New in a Workspace

- 1 Navigate to the workspace where you want to see new items.
- 2 Select *Actions > New in This Workspace*.

## 15.4.8 Viewing What's Unread

The Vibe mobile interface enables you to see new entries that have been added to the Vibe site.

- ♦ “Viewing What's Unread in a Folder” on page 171
- ♦ “Viewing What's Unread in a Workspace” on page 171
- ♦ “Viewing What's Unread across the Entire Site” on page 171

### Viewing What's Unread in a Folder

- 1 Navigate to the folder where you want to see new items.
- 2 Select *Actions > Unread in This Folder*.

### Viewing What's Unread in a Workspace

- 1 Navigate to the workspace where you want to see new items.
- 2 Select *Actions > Unread in This Workspace*.

### Viewing What's Unread across the Entire Site

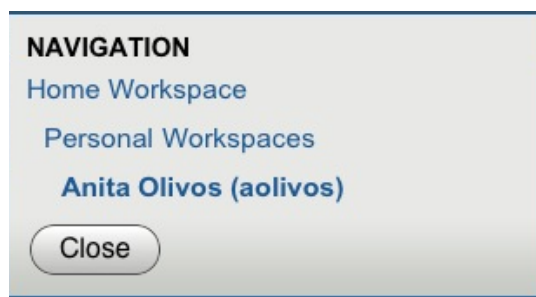
- 1 Navigate to your home page, then click *Actions > Unread Site Wide*.

## 15.4.9 Viewing the Workspace Tree

The Vibe mobile interface enables you to view the Workspace tree, so you can see the hierarchy of where you currently are and quickly navigate to a different workspace or folder.

- 1 Select the *Tree* icon .

The Workspace tree is displayed.



## 15.4.10 Deleting a Folder Entry

The Vibe mobile interface enables you to delete folder entries.

- 1 Navigate to and select the entry that you want to delete.

- 2 Click *Delete*.

If you do not have rights to delete the entry, this option is not displayed.

- 3 Click *OK* when asked if you really want to delete the entry.

## 15.4.11 Calling Vibe Users with One Click (iPhone Only)

When you use Vibe from your iPhone, you can call other Vibe users with just one click.

- 1 Navigate to the personal workspace of the user whom you want to call.

You can navigate to a user's personal workspace by selecting the user's linked name that appears next to any entry that user has posted. Or, you can search for the user as described in [Section 15.4.1, "Searching the Mobile Interface," on page 167](#).

- 2 Select the user's linked phone number.

A call is made to the user.

## 15.4.12 Sending E-Mail

The Vibe mobile interface enables you to quickly send e-mail to other Vibe users.

- 1 Navigate to the personal workspace of the user to whom you want to send an e-mail.

You can navigate to a user's personal workspace by selecting the user's linked name that appears next to any entry that user has posted. Or, you can search for the user as described in [Section 15.4.1, "Searching the Mobile Interface," on page 167](#).



- 2 Select the user's linked e-mail address.

## 15.4.13 Following People and Places of Interest

The Vibe mobile interface enables you to follow places or people. You can easily see activity generated in the specific place that you are following, or by the specific person that you are following.

- ♦ ["Configuring Vibe to Follow Workspaces, Folders, and People" on page 173](#)
- ♦ ["Viewing Your Followed Workspaces, Folders, and People of Interest" on page 173](#)
- ♦ ["Unfollowing Workspaces, Folders, or People" on page 173](#)

## Configuring Vibe to Follow Workspaces, Folders, and People

- 1 Navigate to the workspace or folder that you want to follow. If you want to follow a person, navigate to the user's personal workspace.
- 2 Select *Actions* > *Follow this Folder*, *Follow this Workspace*, or *Follow this Person*, depending on what you want to follow.

## Viewing Your Followed Workspaces, Folders, and People of Interest

If you are currently following a workspace, folder, or person, Vibe enables you to easily see activity generated in the specific place that you are following, or by the specific person that you are following.

- 1 Navigate to the home page of the Vibe mobile interface.  
For information on how to do this, see [Section 15.3.2, "Navigating to the Home Page of the Mobile Interface,"](#) on page 166.
- 2 In the *What's New* drop-down list, select *All Followed*.  
Vibe lists all of the new entries that have been posted to the folders and workspaces that you are following, and lists the entries that have been contributed by the people you are following.

## Unfollowing Workspaces, Folders, or People

If you are currently following someone or some place in Vibe, you can unfollow that person or place in the Vibe mobile interface.

- 1 Navigate to the workspace or folder that you want to stop following. If you want to stop following a Vibe user, navigate to that user's personal workspace.
- 2 Select *Actions* > *Stop Following this Workspace*, *Stop Following this Folder*, or *Stop Following this Person*, depending on what you want to stop following.

## 15.4.14 Transitioning Entries from One Workflow State to Another

The Vibe mobile interface enables you to transition entries from one workflow state to another.

For information on how to create a workflow, see [Chapter 11, "Creating and Managing Workflows,"](#) on page 113.

To transition entries to another workflow state in the Vibe mobile interface:

- 1 Navigate to and select the entry that you want to transition to a new workflow state.
- 2 In the *Workflow* section, select the new workflow state in the drop-down list, then select *OK*.

## 15.4.15 Using Folders

The Vibe mobile interface enables you to use most types of Vibe folders. However, not all folder types support the full functionality that is available when accessing the Vibe site from your workstation. For more information, see [Section 15.5, "Features that Are Not Supported in the Vibe Mobile Interface,"](#) on page 174.

## 15.5 Features that Are Not Supported in the Vibe Mobile Interface

The following Kablink Vibe features are not supported when you access Vibe from the mobile interface. If you want to use any of these features, you must access Vibe from your workstation:

- ♦ “Using Advanced Search” in the *Kablink Vibe OnPrem 3.1 User Guide*
- ♦ “Viewing and Revisiting Recent Entries” in the *Kablink Vibe OnPrem 3.1 User Guide*
- ♦ “Adding a Favorite Place” and “Editing Your Favorite Places” in the *Kablink Vibe OnPrem 3.1 User Guide*
- ♦ “Creating a New Folder” in the *Kablink Vibe OnPrem 3.1 User Guide*
- ♦ “Working with Surveys Folders” in the *Kablink Vibe OnPrem 3.1 User Guide*

You can use the Vibe mobile interface to view Surveys folders and see the titles of the individual surveys that the folders contain, but you cannot view the survey itself or participate in it.

- ♦ “Viewing Your Tasks in a Full Interactive View” in the *Kablink Vibe OnPrem 3.1 User Guide*
- ♦ Chapter 5, “Branding a Folder or Workspace,” on page 47

You cannot use the Vibe mobile interface to brand a workspace or folder, or view branding that has already been created on a workspace or folder.

- ♦ “Editing Files” in the *Kablink Vibe OnPrem 3.1 User Guide*
- ♦ “Attaching Files to a Folder Entry” in the *Kablink Vibe OnPrem 3.1 User Guide*

## 15.6 Security Considerations

When you access Kablink Vibe from your mobile device, you enjoy the same security as when you access Vibe from your workstation. Security features include:

- ♦ Secure access via SSL.
- ♦ All previously established access control settings are preserved in the mobile interface.

However, you cannot set new access control settings in the mobile interface. For information on how to set new access control settings when you access the Vibe site from your workstation, see Chapter 4, “Controlling Access,” on page 37.

## 15.7 Troubleshooting Your Mobile Device

If you encounter difficulties when accessing Kablink Vibe from your mobile device, see “Troubleshooting Your Mobile Device” in the *Kablink Vibe OnPrem 3.1 User Guide*.

# What's New in Vibe 3x

# A

In Kablink Vibe OnPrem 3x you'll find new features, a fresh user interface, and significant updates.

The following list is an overview of the new features in Vibe for advanced users.

- ◆ [Section A.1, "HTML Markup Language \(v3.1\)," on page 175](#)
- ◆ [Section A.2, "Workflow Enhancements \(v3.1\)," on page 175](#)
- ◆ [Section A.3, "Landing Page Enhancements \(v3.1\)," on page 175](#)
- ◆ [Section A.4, "Workspace and Folder Data Quotas \(v3.1\)," on page 176](#)
- ◆ [Section A.5, "Custom Digest Notifications \(v3.1\)," on page 176](#)
- ◆ [Section A.6, "Capture E-Mail You Send from the Vibe Site in One Location \(v3.1\)," on page 176](#)
- ◆ [Section A.7, "Mobile Enhancements \(v3.1\)," on page 176](#)
- ◆ [Section A.8, "Improved Folder and Workspace Branding \(v3\)," on page 177](#)
- ◆ [Section A.9, "Entry-Level Access Controls \(v3\)," on page 177](#)

## A.1 HTML Markup Language (v3.1)

Novell Vibe 3.1 enables you to add HTML markup into any HTML editor, such as in the Description section of entries, folders, and workspaces. For more information, see [Appendix B, "Using HTML Markup in Vibe OnPrem," on page 179](#).

## A.2 Workflow Enhancements (v3.1)

Novell Vibe 3.1 provides new workflow capabilities. These capabilities include:

- ◆ Control which users can manually transition workflows  
For more information, see [Section 11.4.3, "Setting Access Controls on a Manual Transition," on page 143](#).
- ◆ Transition the workflow after users have responded  
For more information, see ["Designating Specific Users to Respond to a Workflow Question" on page 135](#).
- ◆ Specify e-mail addresses for workflow notifications  
For more information, see [Section 11.1.5, "Sending E-Mail Notifications," on page 118](#).

## A.3 Landing Page Enhancements (v3.1)

- ◆ [Section A.3.1, "Reordering Content on a Landing Page," on page 176](#)
- ◆ [Section A.3.2, "Adding HTML Content to a Landing Page," on page 176](#)
- ◆ [Section A.3.3, "Adding Extensions to a Landing Page," on page 176](#)

### **A.3.1 Reordering Content on a Landing Page**

Novell Vibe 3.1 enables you to reorder content on your landing page. For more information, see [Section 6.5, “Reordering the Content of Your Landing Page,”](#) on page 68.

### **A.3.2 Adding HTML Content to a Landing Page**

Novell Vibe 3.1 enables you to add an HTML editor to your landing page. For more information, see [Section 6.2.2, “Adding Content to Your Landing Page,”](#) on page 53.

### **A.3.3 Adding Extensions to a Landing Page**

Novell Vibe 3.1 enables you to add extensions to your landing page. For more information, see [Section 6.2.2, “Adding Content to Your Landing Page,”](#) on page 53.

## **A.4 Workspace and Folder Data Quotas (v3.1)**

If your Vibe administrator has enabled this functionality, you can set data quotas on workspaces and folders that you are manage. For more information, see [Section 13.3, “Setting a Data Quota for Workspaces and Folders,”](#) on page 160.

## **A.5 Custom Digest Notifications (v3.1)**

Novell Vibe 3.1 enables you to set custom digest notifications on your folders, rather than accepting the default digest notification that is set up by your Vibe administrator.

For more information, see [Section 3.5, “Configuring Folders to Send E-Mail Notifications to Other Users,”](#) on page 31.

## **A.6 Capture E-Mail You Send from the Vibe Site in One Location (v3.1)**

Like a personal e-mail Outbox for the Vibe site, you can configure a folder or any e-mail address to receive all e-mail messages that you personally send from the Vibe site.

For more information, see [Section 3.4, “Setting Up a Folder or External E-Mail Address to Receive All Sent E-Mail Messages,”](#) on page 30.

## **A.7 Mobile Enhancements (v3.1)**

Novell Vibe 3.1 enables you to delete folder entries from the mobile interface. For more information, see [Section 15.4.10, “Deleting a Folder Entry,”](#) on page 171.

You can also add users, groups, and teams to calendar and task entries that you create from the mobile interface.



## **A.8 Improved Folder and Workspace Branding (v3)**

Adding a personal brand to your workspace or folder is easier than ever before with Kablink Vibe 3. For information about how you can quickly create a personal brand, see [Chapter 5, “Branding a Folder or Workspace,”](#) on page 47.

## **A.9 Entry-Level Access Controls (v3)**

You can now set access controls on individual entries that differ from those set on the parent folder. For more information, see [Section 4.2.2, “Controlling Access to Entries,”](#) on page 44.



# Using HTML Markup in Vibe OnPrem

# B

Vibe OnPrem enables you to add HTML markup into the following locations of the Vibe interface:

- ♦ Any HTML editor, such as in the *Description* section of entries, folders, and workspaces.  
For more information, see “[Modifying the Description Section of an Entry](#)”, “[Modifying a Folder](#)”, and “[Modifying a Workspace](#)” in the *Kablink Vibe OnPrem 3.1 User Guide*.
- ♦ The Subject Line and Notification Body of workflow notification messages.  
For more information, see [Step 7](#) in [Section 11.1.5](#), “[Sending E-Mail Notifications](#),” on [page 118](#).

You can add the following HTML markup items:

Markup Text	Function
{{vibe:title}}	Outputs the title of the entry, folder, or workspace.
{{vibe:user}}	Outputs the name of the user who is viewing the entry, folder, or workspace.
{{vibe:user name}}	Outputs the user ID of the user who is currently viewing the entry, folder, or workspace.
{{vibe:createdBy}}	Outputs the name of the user who created the entry, folder, or workspace.
{{vibe:createdBy name}}	Outputs the user ID of the user who created the entry, folder, or workspace.
{{vibe:createdOn}}	Outputs the date the entry, folder, or workspace was created.
{{vibe:modifiedBy}}	Outputs the name of the user who last modified the entry, folder, or workspace.
{{vibe:modifiedBy name}}	Outputs the user ID of the user who last modified the entry, folder, or workspace.
{{vibe:modifiedOn}}	Outputs the date the entry, folder, or workspace was last modified.
{{vibe:data   <i>dataName</i> }}	Outputs the value of the specified data item. Data items are elements that have been added to the form or view definition by using the Form and View Designer. Replace <code>dataName</code> with the data name of the element that you want to show.  For a list of elements, see <a href="#">Section 9.4</a> , “ <a href="#">Understanding Elements</a> ,” on <a href="#">page 105</a> .  For more information about how to use the Form and View Designer to create custom forms and views, see <a href="#">Chapter 7</a> , “ <a href="#">Creating Custom Workspace Views</a> ,” on <a href="#">page 77</a> , <a href="#">Chapter 8</a> , “ <a href="#">Creating Custom Folder Views</a> ,” on <a href="#">page 87</a> , and <a href="#">Chapter 9</a> , “ <a href="#">Designing Custom Folder Entry Forms</a> ,” on <a href="#">page 97</a> .

Markup Text	Function
<code>{{vibe:permalink   link}}</code>	<p>Outputs a permalink to the current entry, folder, or workspace. Replace <code>link</code> with the permalink of the entry, folder, or workspace.</p> <p>This markup option is most useful when used in the Subject line of a workflow notification e-mail. For example, the Subject line might read, <code>A workflow changed occurred in entry</code>. The user can then click <code>entry</code> in the Subject line of the notification to be taken directly to the entry.</p> <p>To get the permalink URL of a Vibe page, simply navigate to the page that you want to link to, click <i>Permalink</i> in the footer toolbar, then copy the permalink URL from the <i>Permalink</i> field.</p>
<code>{{vibe:image   imageName   alt=...   height=...   width=...   border=0 or 1}}</code>	<p>Outputs the image that you specify. Replace <code>imageName</code> with the filename of the image that you want to display. Images must be attached to the entry, folder, or workspace.</p> <p>For information on how to attach entries, see “<a href="#">Attaching Files to a Folder Entry</a>”, “<a href="#">Modifying a Folder</a>”, and “<a href="#">Modifying a Workspace</a>” in the <i>Kablink Vibe OnPrem 3.1 User Guide</i>.</p> <p>If you want to specify a custom size, you can add the alt, height, and width arguments. These arguments are not required.</p>
<code>{{vibe:file   filename   title}}</code>	<p>Outputs a link to a file. File must be attached to the entry, folder, or workspace.</p> <p>For information on how to attach entries, see “<a href="#">Attaching Files to a Folder Entry</a>”, “<a href="#">Modifying a Folder</a>”, and “<a href="#">Modifying a Workspace</a>” in the <i>Kablink Vibe OnPrem 3.1 User Guide</i>.</p> <p>For example, <code>{{vibe:file   tree.jpg   tree}}</code> outputs the word <code>tree</code> as a link to the <code>tree.jpg</code> file.</p>
<code>[[entry title]]</code>	<p>Creates a link to the entry that you specify. You must specify the exact name of the entry.</p> <p>For more information about creating links in Vibe, see “<a href="#">Linking to a Folder or Folder Entry</a>” in the <i>Kablink Vibe OnPrem 3.1 User Guide</i>.</p>