Oracle Workspaces

Quick Reference Card

ORACLE COLLABORATION SUITE 10g

Workspace Management

Creating a workspace

1. From the My Workspaces page, click New Workspace.
2. Select the template that you want to use for this workspace, and click Next.
3. Enter a name for the workspace in the **Workspace Name** field.

   Note: The Workspace name must be unique and can contain up to 64 characters. It cannot include special characters, periods, or blank spaces at the beginning or end of the name. Names are not case-sensitive.

4. Enter a display name for the workspace in the **Display Name** field.

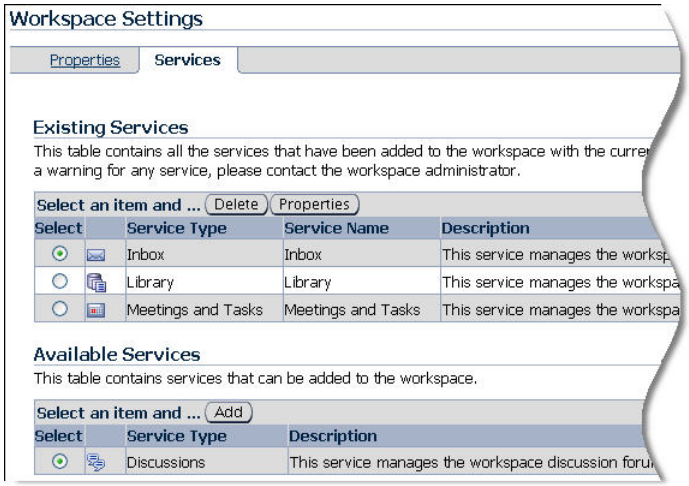
   Note: The Display name must be unique and can contain up to 128 characters. It cannot include special characters or blank spaces at the beginning or end of the name. Display names are case-sensitive.

5. Complete the remaining fields, and click **OK**.

Adding a service to a workspace

Library, Meetings and Tasks, Inbox, and Discussions are considered workspace services.

1. From the My Workspaces page, click the name of the workspace to which you want to add services.
2. Click Settings.
3. Click the **Services** tab.
4. Select a service from the **Available Services** section of the page and click Add.
5. Complete the **Service Name** and **Description** fields, then click **OK**.



Workspace Management

Adding a member to a workspace

1. From the My Workspaces page, click the name of the workspace to which you want to add members, then click the **Members** link in the navigation bar.
2. Click Add Members.
3. To add an individual, enter the user name in the User ID field.
   Alternatively, click the **Browse for User** icon to perform a search.
4. To add the members of a group, enter the group name in the **Users in Group ID** field, or click the **Browse for Group** icon to perform a search.
5. Select a role from the **Role** list, then click Select.
   The user or group is displayed in the **Add Members** section of the page.
6. After verifying that the information displayed is correct, click **OK**.

Linking workspace items

All workspace items can be linked to other workspace items. For example, you may want to link a file to a meeting so that all invitees can review the file before attending the meeting. Or, you may want to create a discussion topic to discuss a document.

Linking a file to a meeting

1. Click the name of the workspace that contains the items you want to link together.
2. Click the **Meetings** link in the navigation bar, and click the appropriate meeting to open the meeting.
3. Click the **Links** tab.
4. From the **New Link To** list, select **File** and click Go.
5. To link to an existing workspace file, enter a description for the link, find the appropriate file or folder in the list and select it, then click **OK**.
6. To upload a new file and then link to it, click Upload Files.
   (See "Uploading a file" under **Using the Workspace Library** for instructions on how to upload a file.)
7. Once the file is uploaded, select it from the Link Files to Meeting page, enter a link description, and click **OK**.

   Note: The procedures for linking one workspace item to another differs for each pair of items. See the online help for more information.

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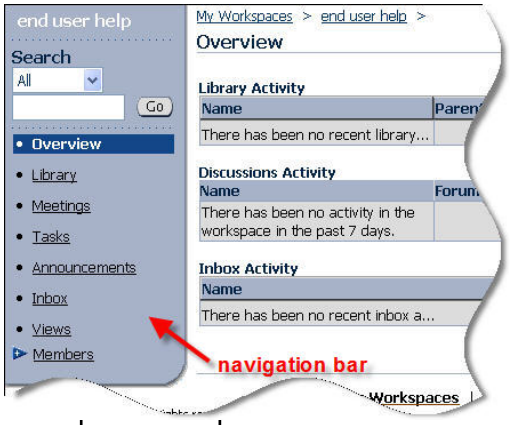
Using the Workspace Library

Creating a new folder

1. Click the name of the workspace within which you want to create a new folder, then click the Library link in the navigation bar.



2. Click New Folder.
3. Complete the **New Folder Name** and **New Folder Description** fields, and click **OK**.

Uploading a file

1. Click the name of the workspace within which you want to upload a file, then click the **Library** link in the navigation bar.
2. If you want to upload a file to an existing folder, click the name of the appropriate folder, then click Upload. If you want to upload a file outside of a folder, click **Upload** from the Library page.
3. Enter the name of the file in the **File** field, including the path to the file. Or click Browse... to find the file you want to upload, and select the file.
4. Click Upload.

Note: Refer to the online help for more information on versioning and uploading files.

Checking out a file

Checking out a file enables you to work on it and save a new version when you check the file back in.

1. Click the name of the workspace containing the file you want to check out, then click **Library** in the navigation bar.
2. Find the appropriate file in the list, and click the **Properties** icon in the **Action** column.
3. Click the **Version History** link. If there is no **Version History** link, versioning is not enabled for the library.
4. Click Check Out.
5. Click **OK**. The **Checked Out** icon appears in the **Status** column.

Note: To edit a file in the Library, you must have Oracle Drive installed, be connected to the server, and have versioning enabled. Or you can download the file to your local machine to edit it, then upload the file when you're done.

Scheduling Meetings and Tasks

Scheduling a meeting

1. Click the name of the workspace in which you want to schedule a meeting, then click **Meetings** in the navigation bar.
2. Click New Meeting.
3. From the **Type** list, select **Standard Meeting** or **Web Conference**.
4. Enter the appropriate information in the fields. If you are scheduling a Web conference and you do not enter a conference key, the system generates one and adds it to the **Conference Key** field.

Adding people and resources

1. Expand the **Users & Resources** section of the meeting entry to select invitees to the meeting.
2. To add resources such as a conference room or projector, enter the resource name in the text box, select **Resources** from the list, and click Find.
3. Select the appropriate names from the results and click **Move**.

Using the Scheduler

1. To view attendee availability, click Scheduler in the **Users & Resources** section on the **Meeting** tab. The date, time, and **Duration** fields are populated with the information from the New Meeting page. You can modify these fields, if necessary.
2. In the **Scheduler start** and **Scheduler end** fields, enter the time range for which you want to view attendee availability, then click Refresh. You can modify the meeting date and time if the attendees are unavailable during the time you originally selected.
3. Click **OK** to return to the New Meeting page.
4. When you finish entering all the necessary information for the meeting entry, click Create.

Note: Workspace members can join a scheduled Web conference from the meeting entry in the workspace. Navigate to the meeting. Click the meeting to open it, then click Join. The Oracle Web Conferencing main page opens. Follow the directions provided.

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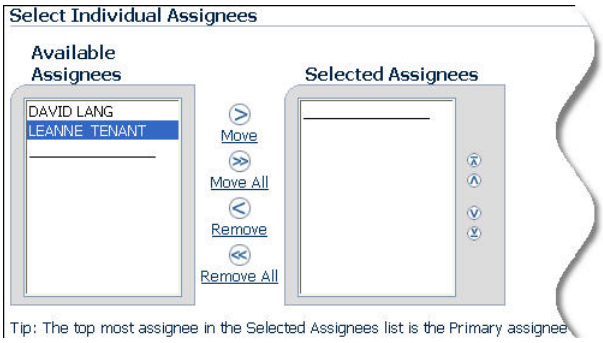
Workspace Management

Creating a task

1. Click the name of the workspace within which you want to create a task, then click the Tasks link in the navigation bar.
2. Click. New Task
3. Enter the appropriate information in the fields on the General page.
4. By default, tasks are assigned to the task creator. To assign the task to another workspace member, select a name from the **Available Assignees** list and click **Move**.
5. Click. Create



Communicating

Communicating with Workspace Members: Announcements

Creating an announcement

Announcements are very useful when you want to broadcast a short message to workspace members. For example, you can use an announcement to provide URLs to Web sites that are relevant to the workspace.

1. Click the name of the workspace within which you want to create an announcement, then click the **Announcements** link in the navigation bar.
2. Click New Announcement.
3. Enter the details of the announcement, then click Create.

Communicating with Workspace Members: Discussion Forums

Creating a forum

1. Click the name of the workspace within which you want to create a forum, then click the **Discussions** link in the navigation bar.
2. Click New Forum.
3. Enter a name for the forum in the **Name** field.
4. If you want to enable users to participate in the discussion forum by e-mail, select the **Enable Email** check box.
5. Enter an e-mail address and description.
6. Click Create.

Starting a new topic

A topic is a set of messages pertaining to the same root message. Topics are contained within forums.

1. Click the workspace that contains the topic you want to reply to, then click the **Discussions** link in the navigation bar.
2. Click the name of the appropriate forum.
3. Click New Topic, and enter the subject and message text.
4. When you are ready to post your topic, click Post.

Replying to a message in a topic

1. Click the workspace that contains the topic you want to reply to, then click the **Discussions** link in the navigation bar.
2. Click the name of the forum that contains the topic you want to reply to.
3. If you are replying to a topic, click the topic name. If you are replying to a message within the topic, click that message.
4. Click Reply, and enter your message.
5. When you are ready to post your topic, click Post.

E-Mail Messages

Sending an e-mail message

1. Click the name of the appropriate workspace, then click the **Inbox** link in the navigation bar.
2. Click **New Message**, and enter your message.
3. Enter the e-mail addresses you want to send the message to in the **Recipients** field. The message is delivered to the workspace Inbox as well as the recipients' e-mail Inboxes.
4. When you are ready to send your message, click **Send**.

Replying to an e-mail message

Replies are grouped together with the original message.

1. Click the name of the appropriate workspace, then click the **Inbox** link in the navigation bar.
2. Select the message you want to reply to by clicking the subject name. The original message and any replies to it are displayed.
3. If you want to respond to one of the original message's replies, click the reply name.
4. Click Reply, then enter your message.
5. When you are ready to send your message, click **Send**.

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Reminders

Modifying workspace properties

After creating a workspace, you can update the workspace properties and some service settings.

1. From the My Workspaces page, click the name of the workspace whose properties you want to modify.
2. Click Settings .
3. Click the **Properties** tab.
4. Make the necessary changes. If you select **True** for **Read Only Setting**, all workspace members, including administrators, will have read-only access to the workspace.
5. To modify service settings, click the **Services** tab. Click **OK** to save your changes.

- A **New content** icon is displayed next to the name of the workspace on the Overview page when workspace properties have been modified since you last logged out of Oracle Workspaces.

Access services

You may not be able to access all services. Only those services that have been added to the workspace appear in the navigation bar.

Communicating with workspace members

You can also view all the workspace members, send an e-mail to a member or start a chat session by expanding the **Members** link.

Adding, modifying, or deleting workspace content

- You must be assigned the role of writer in order to add content or edit existing content in a workspace.
- A **New content** icon is displayed next to the name of the workspace on the Overview page when content is added, modified, or deleted since you last logged out of Oracle Workspaces. When items within a workspace have been added or modified, the **New content** icon also appears next to the items.

Permissions

If you are not able to perform a specific action in Workspaces, you probably have not been granted the required permissions to perform the action.

Linked content

- The **Add linked items** icon indicates there is no existing linked content.
- The **Contains linked content** icon indicates the workspace item has linked content.

Troubleshooting

Scheduling meetings

Why is my 9:30 to 10:30 AM meeting displayed from 9:00 to 10:00 AM in the workspace calendar?

Answer: The Daily and Weekly Planner views do not correctly display meetings starting at half past the hour. To avoid confusion, use the Daily or Weekly List views.

For more troubleshooting information and answers to frequently asked questions, go to:

http://www.oracle.com/technology/products/cs/user_info/oworkspaces/index.html