Oracle® On Track Communication

Web Client Help

Release 1 (1.0.5)

E20655-04

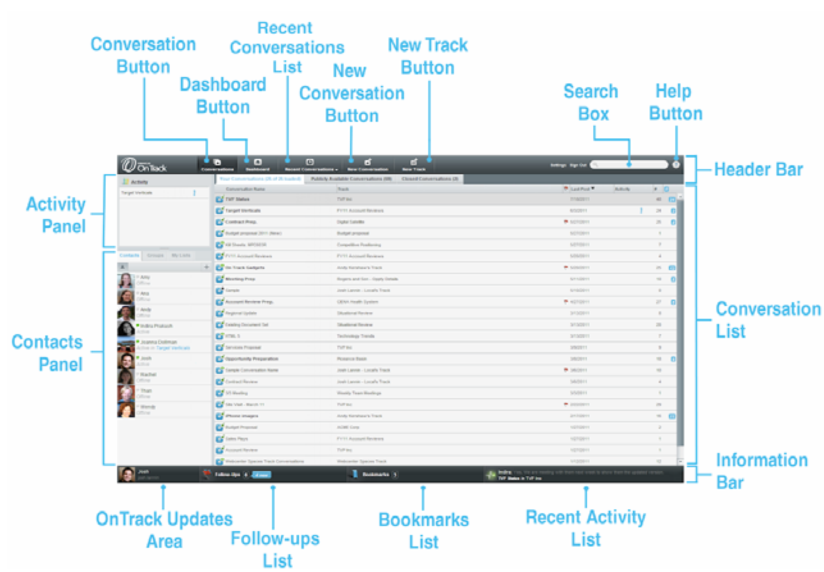
September 2011

Oracle On Track Communication (On Track) enables effective teamwork by providing a platform where users can collaborate by sharing messages, annotating files, and holding voice and application conferences within a rapid, persistent, and in-context environment.

Getting Started	Top Questions
■ Navigating Oracle On Track	■ How Do I Create a Track?
■ Creating and Organizing Content	■ How Do I Create a Conversation?
■ Sharing and Collaborating	■ How Do I Add Members to a Conversation?
■ Interacting with People	■ How Do I Make a Conversation Public?
■ Modifying Your Settings	■ How Do I Upload a New Document?
■ Installing On Track Plug-Ins and Updates	■ How Do I Start a Voice Conference in a Conversation?
■ Glossary	■ How Do I Start an Application Sharing Session in a Conversation?

Navigating Oracle On Track

The following image map of On Track will help you get familiar with the workspace. You can click any item to learn more about it.



Header Bar: Entry points to start working with conversations, tracks, settings, search, and help are located in the On Track Header Bar.

Conversation Button: Browse through all conversations you are a member of, publicly available conversations, and conversations that have been closed. To learn more about working with conversations see section Conversations.

Dashboard Button: Browse, organize and, create new tracks. To learn more about organizing tracks see section Your Dashboard.

Recent Conversations Lists: See a list of all the conversations you have recently collaborated in, joined, created, or viewed.

New Conversation Button: Click this button to create a new conversation. This button automatically creates a new conversation under your default track. To learn more about working with conversations see section Conversations.

New Track Button: Click this button to create a new track. A new conversation will automatically be created inside your new track. To learn more about working with tracks see section Tracks.

Search Box: You can search for messages, conversations, documents, tags, tracks, users, or globally by entering a keyword in the search box and hitting Enter. To learn more about searching for content in On Track see section Search.

Help Button: Click this button to open the Oracle On Track Web Client Help Guide you are reading.

Activity Panel: A list of all the currently active conversations you are a member of will appear in the Activity Panel. The Active Members icon next to each conversation indicates the amount of active participants in it. When you hover over each Active Members icon, you are able to see the names of the currently active participants in each conversation. If there is a voice conference or an application sharing session in progress, a Phone icon or an Application Sharing icon will also appear next to the conversation name. You can click on the conversation to open it, and then click the Join button to connect to the live sessions.

Contacts Panel: Find a list of the contacts you have added and search for new contacts to connect and interact with. To learn more about interacting with people see section Interacting with People.

Information Bar: Application updates and your lists of follow-ups, bookmarks, and recent activity are found here for easy access to them. To learn more about working with bookmarks and follow-ups see section Creating and Organizing Content

On Track Updates Area: On Track plug-ins and their available updates will appear in the Updates Area on the On Track Information Bar. To learn more about installing available plug-ins and their updates see section Installing On Track Plug-Ins and Updates

Follow-Ups List: Hover over this area to see a list of the follow-ups that have been assigned to you. To learn more about working with follow-ups see section Follow-Ups.

Bookmark List: Hover over this area to see a list of the bookmarks you have created. To learn more about working with bookmarks see section Bookmarks.

Recent Activity List: Hover over this area to see a list of the most recent activity happening in the conversations you have joined.

Conversation List: Find lists of all the conversations you are a member of, publicly available conversations you can join, and closed conversations you have access to.

Creating and Organizing Content

On Track empowers you and other users to effectively communicate and collaborate by creating, sharing, and organizing content within persistent public or private forums called Conversations. These individual Conversations can be grouped together in Tracks. Tracks act like containers of related Conversations to facilitate organization and access to them.

You can collect bookmarks and flags of interesting and important items stored inside conversations. On Track will store and provide quick and organized views of such items for easy future reference and retrieval.

On Track is fully search enabled to facilitate finding and filtering content when you need it the most.

To learn more about ways of Creating and Organizing content in On Track, refer to the following topics:

- Tracks
- Conversations
- Your Dashboard
- Bookmarks
- Follow-Ups
- Search

Tracks

Tracks let you organize your related conversations in groups or containers. When you create a new conversation and you do not specify in which track to include it, it will automatically be created in your default track.

To learn more about working with Tracks to organize your content in On Track refer to the following topics:

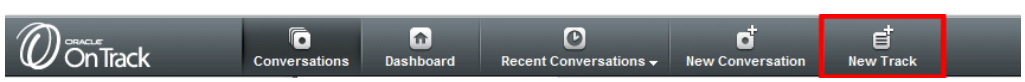
- How Do I Create a Track?
- How Do I Change the Name of a Track?
- How Do I Copy a Track URL to My Clipboard?
- How Do I Browse Available Tracks?
- How Do I View All Conversations Inside a Track?
- How Do I Organize My Tracks?

How Do I Create a Track?

Create a new track to start grouping related conversations within it.

To create a new track:

1. In the On Track Header Bar, Click + **New Track**.



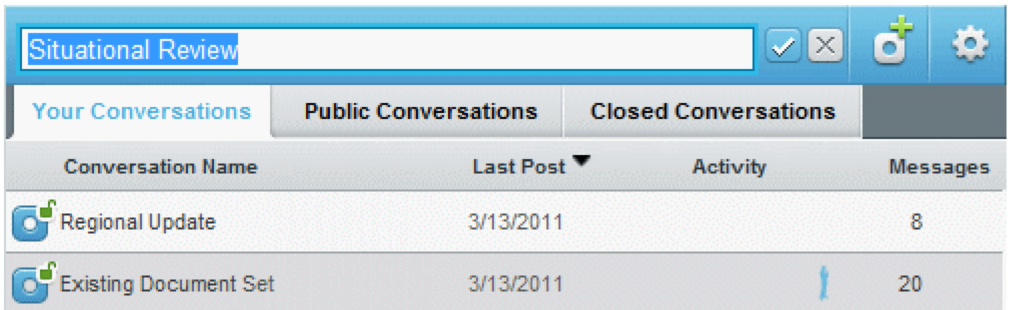
A new track with a new private conversation inside it is automatically created and displayed. The default name of the track is New Track. To change the Track name see section How Do I Change the Name of a Track?

How Do I Change the Name of a Track?

You and other members of a conversation can change the name of the Track it belongs to at any given time.

To change the name of a track you are a member of:

1. Navigate to the desired track.
2. In the Track Panel, locate the Track Header and click on the track name to enable editing the field.



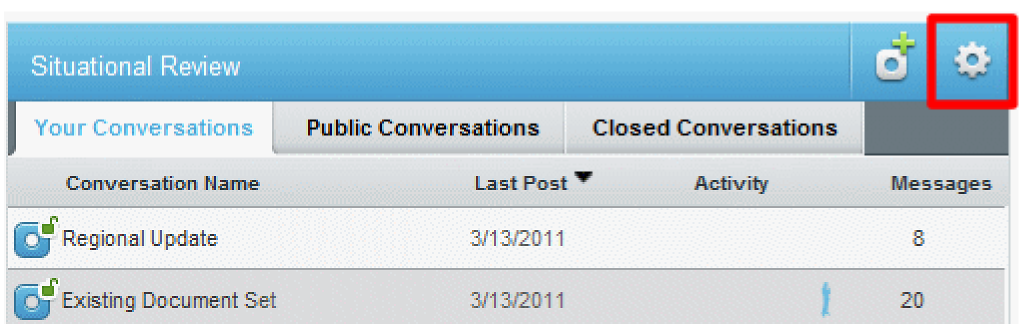
3. A textbox with the current track name will appear. Modify that name and click the check mark next to it or hit **Enter** to save the new name.

How Do I Copy a Track URL to My Clipboard?

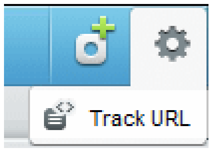
Copy a Track URL to your clipboard to easily share its direct web address to it with people. When people navigate to a Track URL, they will immediately view the Track content without having to spend time browsing for it.

To copy and share a URL to a Track:

1. Navigate to the desired Track.
2. In the Track Panel, locate the Track Header and click the **Track Settings** icon to display menu options.



3. Select **Track URL.**
4. A dialog box displaying the URL of the selected Track appears. You may select the URL and then click Ctrl+C to copy it to your clipboard.



5. Click **OK** to dismiss the Track URL dialog box.

How Do I Browse Available Tracks?

To see a list of all the tracks that are available to you and the conversations they contain, visit your Dashboard.

To browse available tracks:

1. In the On Track Header Bar, click **Dashboard**.
2. In the Dashboard Panel, locate the Dashboard Header and click the **Available Tracks** tab to see a list of all the tracks accessible to you and the number of conversations each contains.

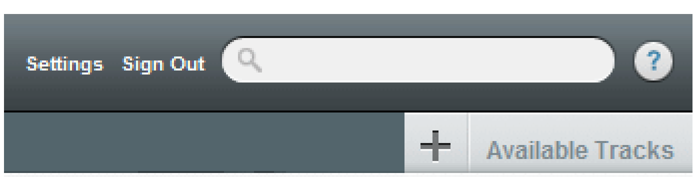
> **Note:** Tracks that you have organized inside your personal tabs in the Dashboard will no longer appear in the list of Available Tracks. To learn more about working with your Dashboard, see section Your Dashboard

How Do I View All Conversations Inside a Track?

Navigate to a Track to see a list of all the conversations that are available to you inside of it.

To see a list of conversations inside a track:

1. In the On Track Header Bar, click **Dashboard**.
2. In the Dashboard Panel, locate the Dashboard Header and click the **Available Tracks** tab to see a list of all the tracks accessible to you and the number of conversations each contains.



3. You may select any available track to load the Track Panel and the Conversation Panel. In the Track Panel you can find the list of conversations in the selected track. In the Conversation Panel you will see the content of the conversation you select.

How Do I Organize My Tracks?

Your Dashboard is an area where you can organize your tracks into personal tabs so you can easily find, monitor, and access the ones you frequently need the most.

To learn more about what you can do in your Dashboard, see section Your Dashboard

Conversations

Conversations in On Track help you discuss topics and collaborate with the people you chose. You can post messages, upload files, hold application and audio conferences, and publish polls and external Web sites all in the same place. All activity in a conversation is recorded for future reference.

To learn more about Conversations refer to the following topics:

What is the Difference between a Public and a Private Conversation?

On Track allows you to create private conversations that only you and the people you explicitly add can see and modify. All the new conversations you create are created as private by default. You and other members of a private conversation can close the conversation or change its visibility and access to make it publicly available for everyone to see and join.

Use a private conversation to collaborate on a project or discuss an issue that concerns only you and other members you intend to add. Use a public conversation to discuss open and visible projects you require everyone to find. Anyone in your organization who uses Oracle On Track Communication will be able to see, join, and contribute to conversations made publicly available.

How Do I Create a Conversation?

Create a conversation to open a collaborative forum to share and store details about a certain topic. Conversations must belong to a track. A track is a container where you can group and organize related conversations.

To create a conversation inside a track:

1. Click the **Dashboard** button in the On Track Header Bar.
2. To view all available tracks click the **Available Tracks** sub tab.
3. Select the track where you want to create a new conversation by clicking on it once.
4. Click the **New Conversation** button in the On Track Header Bar.

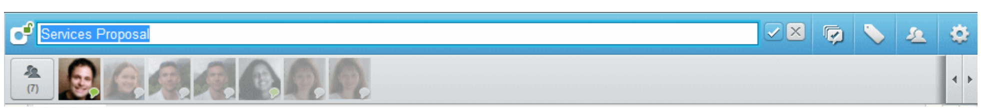
A private conversation with the default name New Conversation is created inside the selected track. To change the conversations name see section How Do I Change the Name of a Conversation?

How Do I Change the Name of a Conversation?

You and other members of a conversation can change its name at any given time.

To change the name of a conversation you are a member of:

1. Navigate to the desired conversation.
2. In the Conversation Panel, locate the Conversation Header and click on the conversation name to enable editing the field.



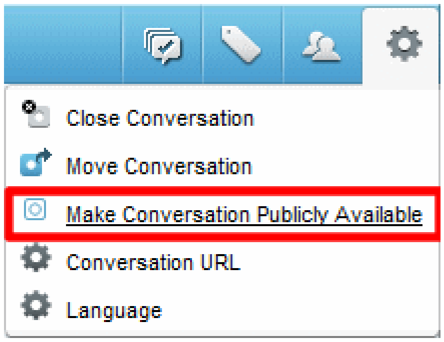
3. A textbox with the current conversation name will appear. Modify that name and click the check mark next to it or hit **Enter** to save the new name.

How Do I Make a Conversation Public?

If you need your conversation to be publicly available for anyone in your organization to find and join, you need to change its privacy and access settings.

To make your conversation public:

1. Navigate to desired conversation.
2. In the Conversation Panel, locate the Conversation Header, and click the **Conversation Settings** icon to display menu options.



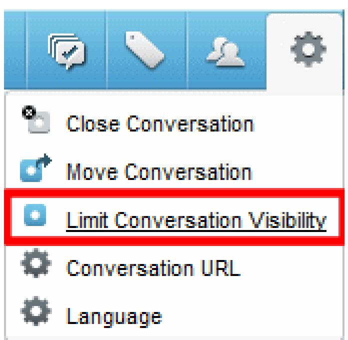
3. Select **Make Conversation Publicly Available**.
4. A message box asking you to confirm you want to make the conversation publicly available appears. Click **Yes**.
5. A label reading **Public** will now be visible in the Conversation Membership bar underneath the Conversation Header area.

How Do I Make a Conversation Private?

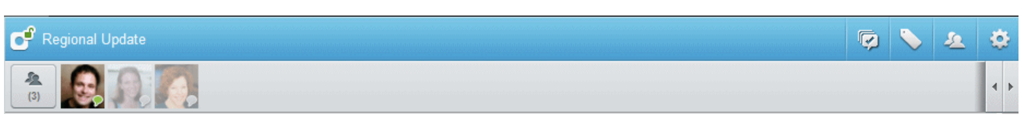
If you need to limit the visibility and access of a publicly available conversation you are a member of so only you and its members can continue to see, modify, and collaborate in it, change its privacy and access settings.

To make your conversation private:

1. Navigate to desired conversation.
2. In the Conversation Panel, locate the Conversation Header and click the **Conversation Settings** icon to display menu options.



3. Select **Limit Conversation Visibility.**
4. A message box asking you to confirm you want to limit the visibility of the selected conversation appears. Click **Yes.**
5. A label reading "Public" will no longer be visible in the Conversation Membership bar underneath the Conversation Header area.

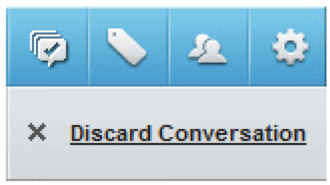


How Do I Delete a Conversation?

Discard a Conversation when you no longer need its content to be available to you or other users. To delete a conversation, you need to remove all members except yourself from the conversation.

To delete a conversation:

1. Navigate to the desired conversation.
2. Remove all members from the conversation except yourself. To learn how to remove members form a conversation see section How Do I Remove Members from a Conversation?
3. In the Conversation Panel, locate the Conversation Membership bar beneath the Conversation Header, and click the **Discard Conversation** link.



4. A dialog box asking you to confirm you want to discard the selected conversation appears. Click **OK** to finish deleting the conversation.

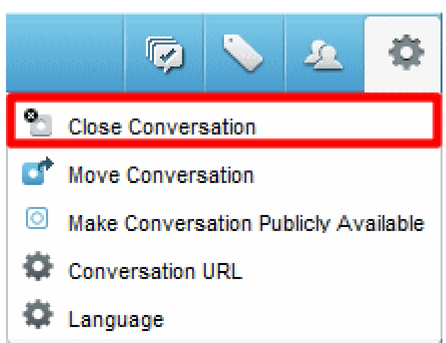
The conversation is no longer available to you or anybody else. If members had bookmarked or flagged items in the conversation, they will disappear from their Bookmarks and Follow-ups lists.

How Do I Close a Conversation?

Close a conversation when you no longer want members to contribute content to it but you still want the conversation to be accessible to them or other new members who would like to reference stored material in it. You may re-open the conversation at a later time if new contributions need to be made. Any user that is a member of a conversation can close a conversation.

To close a conversation:

1. Navigate to desired conversation.
2. In the Conversation Panel, locate the Conversation Header and click the **Conversation Settings** icon to display menu options.



3. Select **Close Conversation**.

4. The Close Conversation Panel appears. In the multiline textbox underneath the Conversation Panel Header, optionally enter a summary of the conversation or a reason for closing it. You may format your message. To learn more about formatting options available to you see section How Do I Format a Message?

5. Click the **Close** button in the Close Conversation Panel Footer to finish closing the conversation.

A message stating the conversation has been closed by you will appear in the Conversation Panel. You and other current members will now find the conversation in your Closed Conversations list. To access this list see sectionHow Do I View a List of All the Closed Conversations I Am a Member Of?

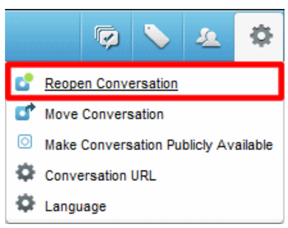
How Do I Re-open a Conversation?

Reopen a closed conversation when you want to allow members to contribute content to a closed conversation again. Any current members of a closed conversation can re-open the conversation.

To reopen a conversation:

1. Navigate to desired conversation. To find a list of closed conversations see section How Do I View a List of All the Closed Conversations I Am a Member Of?

2. In the Conversation Panel, locate the Conversation Header and click the **Conversation Settings** icon to display menu options.



3. Select **Re-open Conversation**.

4. A dialog box asking you to confirm you want to re-open the selected conversation appears. Click **Yes** to reopen the conversation.

A message stating the conversation has been re-opened by you will appear in the Conversation Panel. Members may now contribute new content to the conversation.

How Do I Copy a Conversation URL to My Clipboard?

Copy a Conversation URL to your clipboard to easily share a direct web address to it with people. When people navigate to a Conversation URL, they will immediately view the Conversation content without having to spend time browsing for it.

To copy and share a URL to a conversation:

1. Navigate to the desired conversation.

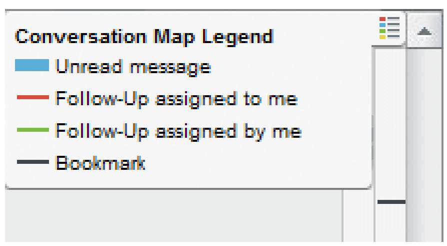
2. In the Conversation Panel, locate the Conversation Header and click the **Conversation Settings** icon to display menu options.

3. Select **Conversation URL**.
4. A dialog box displaying the URL of the selected Track appears. You may select the URL and then click Ctrl+C to copy it to your clipboard.
5. Click **OK** to dismiss the Conversation URL dialog box.

How Do I Identify Unread Messages, Follow-Ups, and Bookmarks in a Conversation?

To skim through a conversation and quickly identify unread items that have been bookmarked or marked for follow-up, you may use the Conversation Map Bar.

To access the Conversation Map Legend and understand how to work with the Conversation Map Bar, click on the Conversation Map icon located to the left of the Conversation vertical scroll bar.



The Conversation Map legend identifies the following items with different colors. Click on the appropriate bar in the Conversation Map Bar to be taken to the item you are looking for in the conversation:

Unread Message: A thick blue bar in the conversation map bar indicates the presence of an unread message in the conversation. Click on any blue bar to automatically scroll to the referenced unread message.

Follow-Up assigned to me: A thin red bar in the conversation map bar indicates the presence of a follow-up assigned to me in the conversation. Click on any red bar to automatically scroll to the referenced follow-up.

Follow-Up assigned by me: A thin green bar in the conversation map bar indicates the presence of a follow-up assigned by me to another user in the conversation. Click on any green bar to automatically scroll to the referenced follow-up.

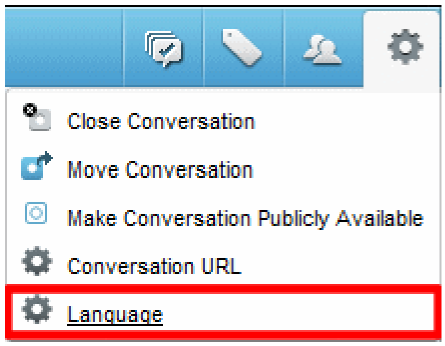
Bookmark: A thin black bar in the conversation map bar indicates the presence of a follow-up assigned to me in the conversation. Click on any black bar to automatically scroll to the referenced follow-up.

How Do I Change the Language in a Conversation?

Change the language On Track uses to post system messages when you perform an action like start a voice conference or change the settings. This option does not change the language used throughout the user interface but it does change the language in system posts for all members of the selected conversation.

To change the language used by the system to communicate in the conversation:

1. Navigate to the desired conversation.
2. In the Conversation Panel, locate the Conversation Header and click the **Conversation Settings** icon to display menu options.



3. Select **Language**.
4. A dialog box displaying a dropdown with the available languages appears. Select the desired language from the dropdown. You can choose from: Chinese (China), Chinese (Taiwan), English, French, German, Italian, Japanese, Korean, Portuguese (Brazil), and Spanish.
5. Click **OK** to confirm your choice and dismiss the dialog box.

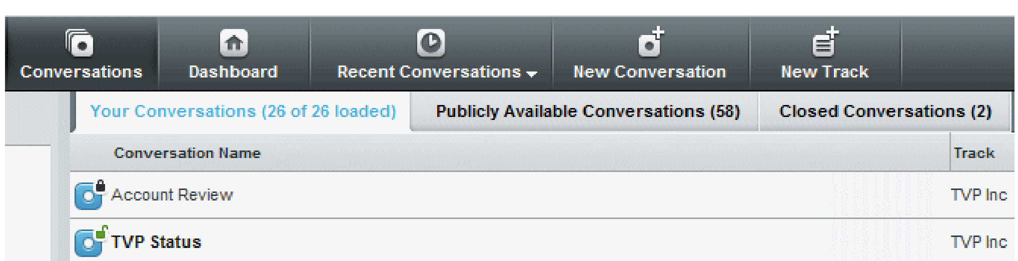
A system message using your selected language and stating the conversation attributes have changed appears in the Conversation Panel.

How Do I View a List of All the Public Conversations I Can Join?

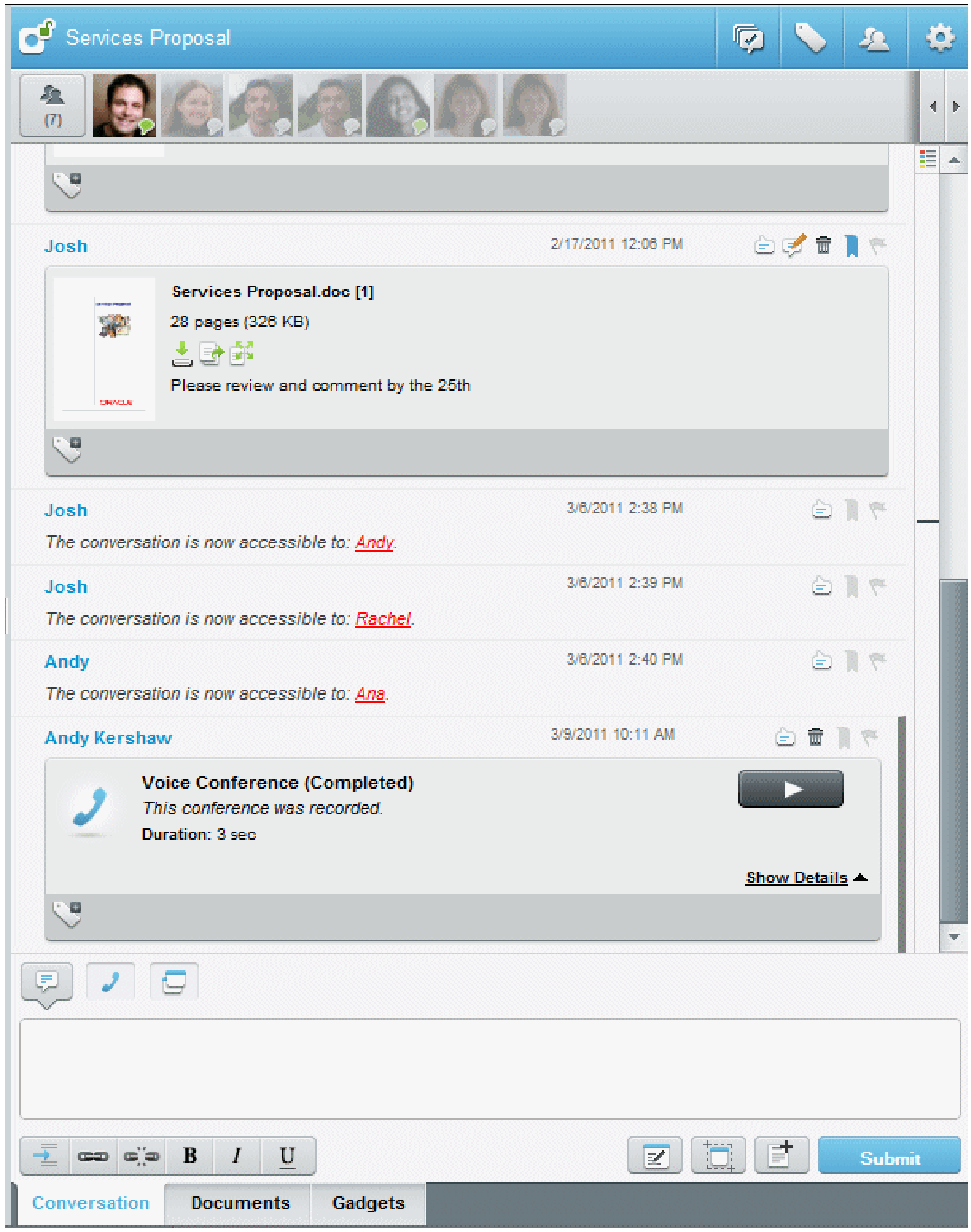
Public conversations are open forums for any On Track user in your organization to see, join, and contribute to if interested. Browse through the list of public conversations available to you to browse their content or become a member.

To see a list of all the public conversations you can join:

1. Click the **Conversations** button in the On Track Header bar.
2. Click the **Publicly Available Conversations** sub tab.



3. Click the conversation in which you are interested to see its content in the Conversation Panel.



In order to contribute content to a public conversation you must become a member. To become a member see section How Do I Join a Public Conversation?

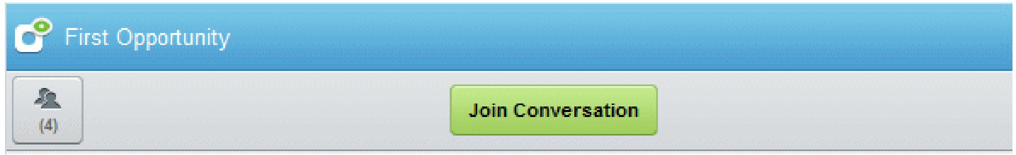
How Do I Join a Public Conversation?

Join a public conversation to be able to contribute content to it and make it easier to find it and keep track of it.

To join a public conversation:

1. Navigate to desired conversation.

2. In the Conversation Panel, click the **Join Conversation** button located in the Conversation Membership bar beneath the Conversation Header.



3. A message box confirming you are now a member of the conversation appears. Click **OK.**

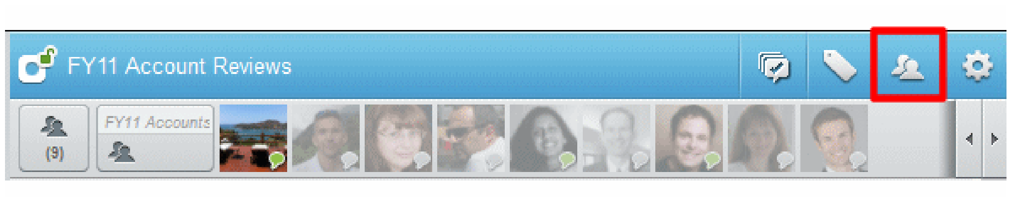
Because there is no approval necessary to join a conversation, your request to become a member is effective immediately. You may contribute content to the conversation instantly after joining.

How Do I Remove Myself from a Conversation?

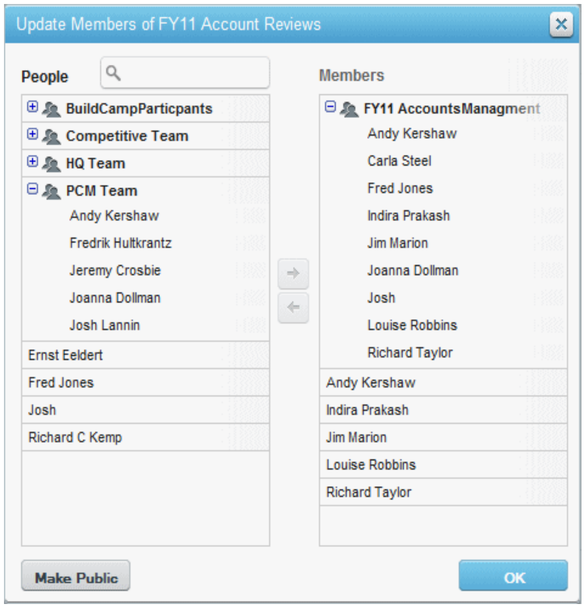
Remove yourself from a conversation if you do not need to collaborate in that forum anymore and would like to stop receiving updates about it in your digest.

To remove yourself from a conversation:

1. Navigate to desired conversation.
2. In the Conversation Header, click the **Add Members** icon.



3. The Update Members of Conversation dialog box appears. Your contacts, groups, and lists will appear in the People selection box. All members of a conversation will appear in the Members selection box. Select your name.



4. Click the left arrow to move the selected people to the to the People selection box.
5. Click **OK**.
6. A message box asking you to confirm you want to delete the number of members you selected from the conversation appears. Click **Yes.**
7. A message box confirming you want to remove yourself from the selected conversation appears. Click **Yes.**

You will no longer be able to contribute content to the conversation. If the conversation is Private, you will no longer see it. If the conversation is Public, you will be able to see and join it again.

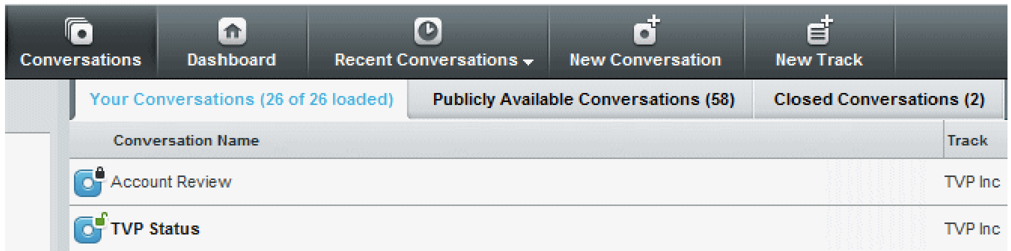
> **Note:** If you are the author of a private conversation and are the only member left in it, you may still remove yourself from the conversation. By doing so, the conversation will no longer be accessible to anyone.

How Do I View a List of All the Conversations I am a Member Of?

The Your Conversations sub tab contains a list of all the conversations you are a member of. You can use this list to browse through the conversations you have joined or other people have added you to.

To view a list of all the conversations you are a member of:

1. Click the **Conversations** button in the On Track Header Bar.
2. Click the **Your Conversations** sub tab.



3. Click the conversation in which you are interested to see its content in the Conversation Panel.

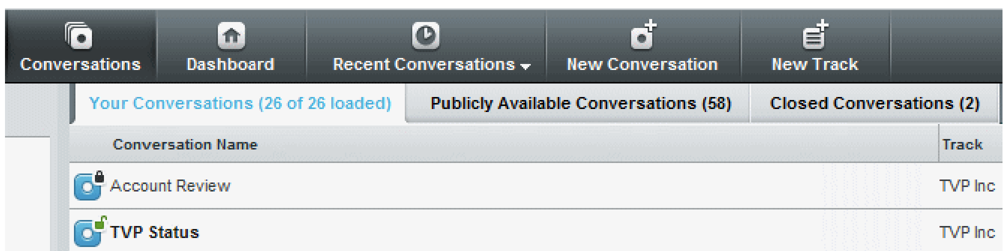
The default view of this list shows your conversations ordered by last post descending. To order by a different column name see section How Do I Order Conversation Lists?

How Do I View a List of All the Closed Conversations I Am a Member Of?

The Closed Conversations sub tab contains a list of all the conversations accessible to you that you are a member of. You can use this list to browse through the conversations you have joined or other people have added you to.

To view a list of all the conversations you are a member of:

1. Click the **Conversations** button in the On Track Header Bar.
2. Click the **Your Conversations** sub tab.



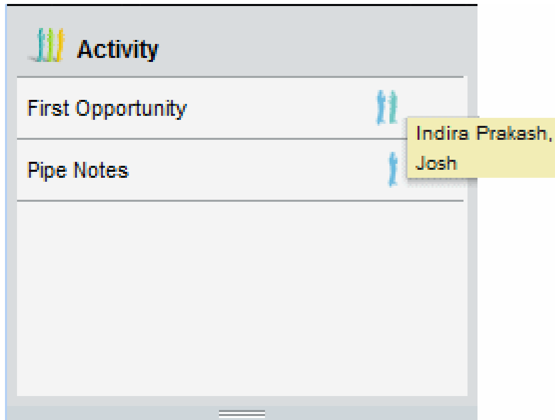
3. Click the conversation in which you are interested to see its content in the Conversation Panel.

The default view of this list shows your conversations ordered by last post descending. To order by a different column name see section How Do I Order Conversation Lists?

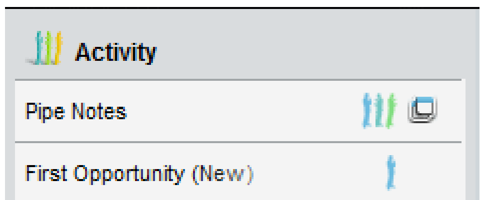
How Do I View Currently Active Conversations I Am a Member Of?

The Activity Pane gives you a quick glimpse of the activity happening in the conversations you are a member of. You can easily see who is being active in each conversation and quickly find conversations hosting voice conferences or application sessions you might want to join.

Hover over the Active Members icon to see a list of people currently active in the conversation.



An Application Sharing session in progress icon next to the conversation name indicates an application sharing session is happening. Click on the conversation name to open the conversation and join the session by clicking the Join button.



If you see a voice conference in progress icon next to the conversation name, it means a voice conference is happening. Click on the conversation name to open the conversation and join the conference by clicking the Join button.

How Do I View My Recent Conversations?

Your Recent Conversations list gives you quick and easy access to your most recently visited conversations in descending order.

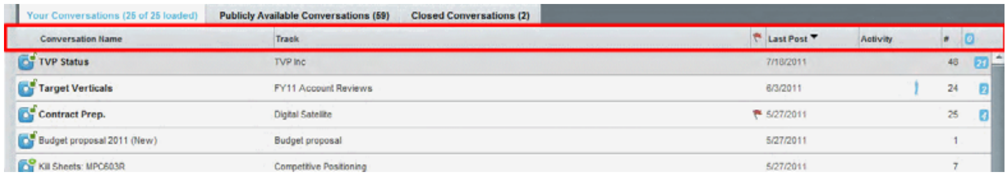
To navigate back to a previous conversation, avoid using your browser's Back button. Instead, use your Recent Conversations list to select the conversation you want to view.

To view your most recent conversations:

1. Click the **Recent Conversations** button in the On Track Header Bar.
2. A list will pop up displaying your most recent conversations.
3. Select the conversation that you want to access.

How Do I Order Conversation Lists?

The default view of conversation lists in On Track is ordered by last post descending. To toggle between ascending and descending order for each column, click their respective headers.



Column headers show an up arrow when ascending order is selected and a down arrow when descending order is selected.

The selected ordering of conversation lists will persist until you logout of the current session or refresh the browser.

The following ordering options are available to you in certain conversation lists:

Conversation Name

Refers to the name used to identify a conversation.

Ascending: Orders conversations by their name, from the smallest or lowest value (1 or A) to the largest or highest value.

Descending: Orders conversations by their name, from the largest or highest value to the lowest.

Last Post

Refers to conversations with the newest posts.

Ascending: Orders conversations listing the one containing the oldest post first, to the one containing the most recent posts last.

Descending: Orders conversations listing the one containing the most current post first, to the one containing the oldest post last.

Activity

Refers to conversations with the most currently active members.

Ascending: Orders conversations starting with the least currently active to the most currently active.

Descending: Orders conversations starting with the most currently active to the least currently active.

Messages

Refers to the number of messages in a conversation.

Ascending: Orders conversations from the one containing the least number of messages to the one containing the most number of messages.

Descending: Orders conversations from the one containing the most number of messages to the one containing the least number of messages.

Flags (Follow-ups)

Refers to conversations that contain flagged items for follow-up assigned to you.

Ascending: Orders conversations starting with the one containing the least flagged items to the one containing the most flagged items.

Descending: Orders conversations starting with the one containing the most flagged items to the one containing the least flagged items.

New Messages

Refers to conversations that contain new unread messages.

Ascending: Orders conversations starting with the one containing the oldest unread messages, to the one containing the newest unread messages.

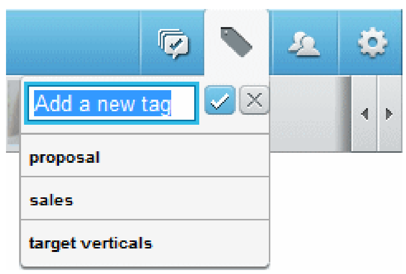
Descending: Orders conversations starting with the one containing the newest unread messages, to the one containing the oldest unread messages.

How Do I Add a Tag to a Conversation?

Tags are key words that describe the content of your conversation. Add tags to your conversation to make it easier for you and other users to find them when searching for certain topics.

To add tags to a conversation:

1. Navigate to desired conversation.
2. In the Conversation Panel, locate the Conversation Header and click the **Tags** icon.



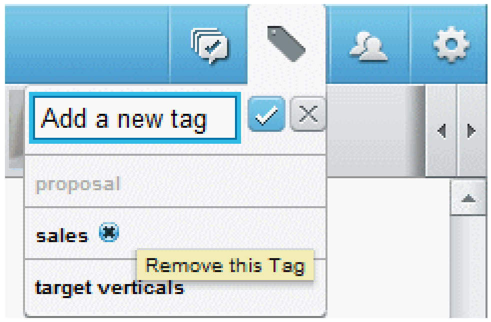
3. A textbox reading *Add a new tag* appears. If the conversation has been tagged before, its associated tags will appear listed below the textbox. Delete the placeholder text and enter the tag you want to add.
4. To enter several tags at once, separate them with a comma.
5. Click on the Checkmark icon next to the textbox or hit **Enter** to save the new tags.

How Do I Delete a Tag from a Conversation?

Delete a tag from your conversation if that keyword no longer describes the content found in that forum and you no longer want the conversation to appear in search results related to that topic.

To delete a tag from a conversation:

1. Navigate to desired conversation.
2. In the Conversation Panel, locate the Conversation Header and click the **Tags** icon.
3. A textbox reading *Add a new tag* appears. If the conversation has been tagged before, its associated tags will appear listed below the textbox.
4. Hover over the tag you wish to delete. An x icon appears next to the tag you are hovering over. Click it to mark that tag for deletion.



5. To delete several tags at once, hover over each tag you wish to delete and click their x icon. Tags marked for deletion will be grayed out.
6. Click on the **Checkmark** icon next to the Add a new tag textbox to finish deleting the selected tags.

Your Dashboard

Your Dashboard is the place where you can browse all available tracks and organize them into Personal Tabs to easily find, visualize, and monitor their status. In each tab you may add as many as 9 tracks you wish to monitor.

The tabs themselves convey important information about the tracks they contain. Next to the tab name you will see 9 empty grayed-out Chiclets. These Chiclets will be filled out in red or blue when you add tracks to your tabs. The blue Chiclets indicate you have read all the content in the conversations inside a track you added. The red Chiclets reflect there are tracks that contain conversations with unread content. the conversations you added have not been read.

To learn more about Your Dashboard refer to the following topics:

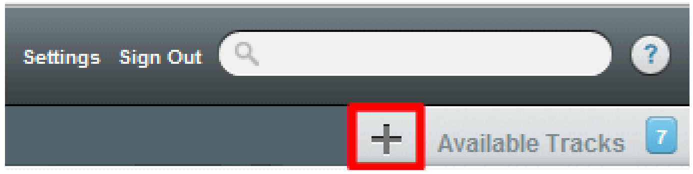
- How Do I Add a Personal Tab to My Dashboard?
- How Do I Reorder My Personal Tabs?
- How Do I Delete a Personal Tab?
- How Do I Add a Track to a Personal Tab in My Dashboard?
- How Do I Remove a Track from a Personal Tab?

How Do I Add a Personal Tab to My Dashboard?

Create a personal tab to store and organize up to 9 tracks you wish to follow and easily access.

To create a personal tab:

1. In the On Track Header Bar, click **Dashboard**.
2. In the Dashboard Pane, locate the Dashboard Header and click the + icon next to **Available Tracks** to create a new tab.



3. The Enter a new tab name dialog appears. Enter your desired tab name and click **OK** to save it.

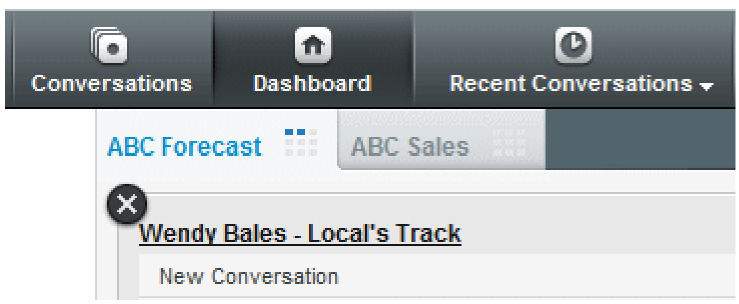
An empty tab with the name you specified is created. You may now add tracks to your tab. To add a tracks to your tab see section How Do I Add a Track to a Personal Tab in My Dashboard?

How Do I Reorder My Personal Tabs?

Move your personal tabs to group together related tabs or to have the ones your access the most appear first.

To reorder your personal tabs:

1. In the On Track Header Bar, click **Dashboard**.
2. In the Dashboard Pane, locate the Dashboard Header, and click and drag the tab you wish to move.
3. Drag the tab to the place where you want it located and release the click to let go of the tab.

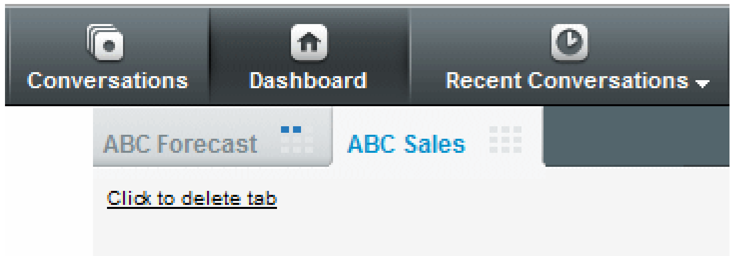


How Do I Delete a Personal Tab?

Delete a personal tab when you no longer need to organize or quickly access the tracks it contains. You need to remove all tracks within a personal tab to be able to delete it. You cannot delete the last tab available in your Dashboard.

To delete a personal tab:

1. In the On Track Header Bar, click **Dashboard.**
2. In the Dashboard Panel, locate the Dashboard Header, and click o n the personal tab you wish to delete to access its contents.
3. Remove all available tracks within the tab. To remove a track form a personal tab see section How Do I Remove a Track from a Personal Tab?
4. When you have removed all available tracks within a personal tab, a Click to delete tab link will appear underneath the tab name inside the tab panel. **Click it to delete the tab.**



Your personal tab automatically disappears and you are taken into the nearest tab to the left.

How Do I Add a Track to a Personal Tab in My Dashboard?

Add tracks to your personal tabs to start grouping them for easy access and monitoring.

To add a track to a personal tab:

1. In the On Track Header Bar, click **Dashboard**.
2. In the Dashboard Pane, locate the Dashboard Header and click the **Available Tracks** tab to see a list of all the tracks accessible to you and the number of conversations each contains.

3. Click and drag into your personal tab the Track you wish to add.
4. When your cursor is hovering on top of the personal tab where you want the track located, release the click to let go of the track.

Your track will now live in the personal tab you selected. Tracks found inside personal tabs no longer appear in the Available Tracks list.

How Do I Remove a Track from a Personal Tab?

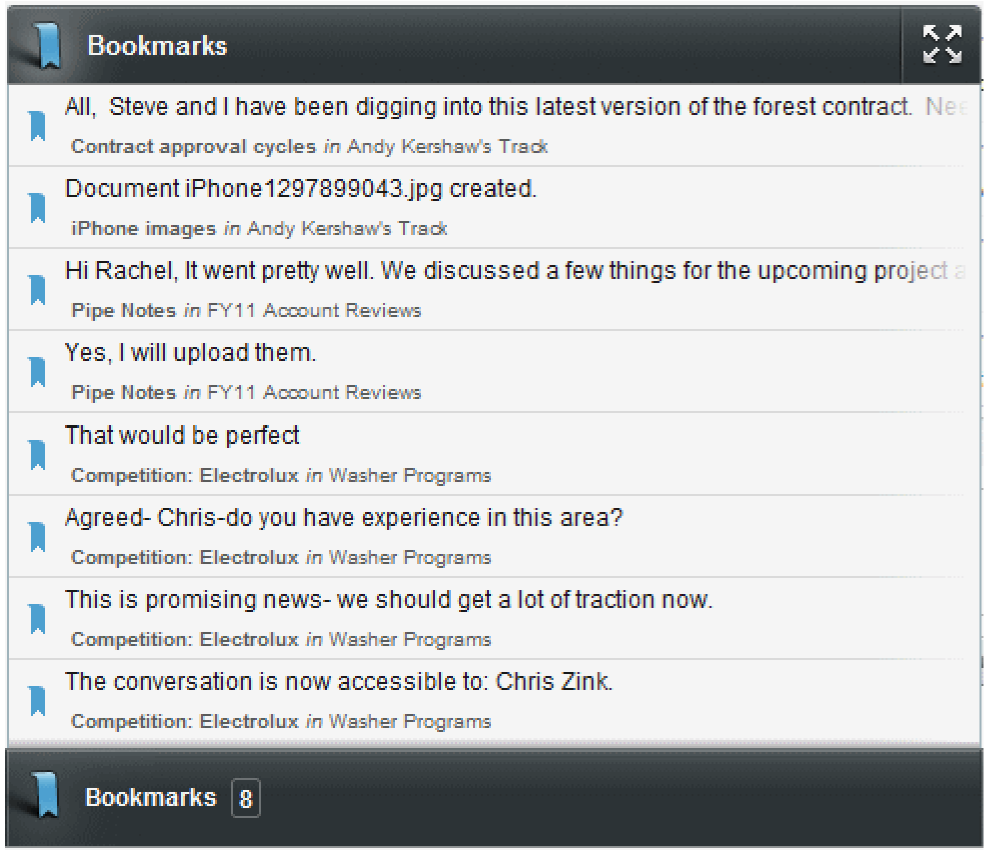
Remove a track from a personal tab when you no longer wish to monitor it closely or if you need to make room for another track in that tab.

To remove a track from a personal tab:

1. In the On Track Header Bar, click **Dashboard**.
2. In the Dashboard Panel, locate the Dashboard Header, and click on the personal tab you wish to delete to access its contents.
3. In the personal tab panel, hover over any available tracks and click the x icon that appears to remove the track. The track automatically disappears.

Bookmarks

Create bookmarks to help you keep track of important items you need to have readily available for reference. When you bookmark an item it gets added to your Bookmarks List. You can access your Bookmark list from the On Track Information Bar.



You can bookmark messages, files, application sharing sessions, voice conferences, polls, and other gadgets in a conversation.

To learn more about Your Bookmarks refer to the following topics:

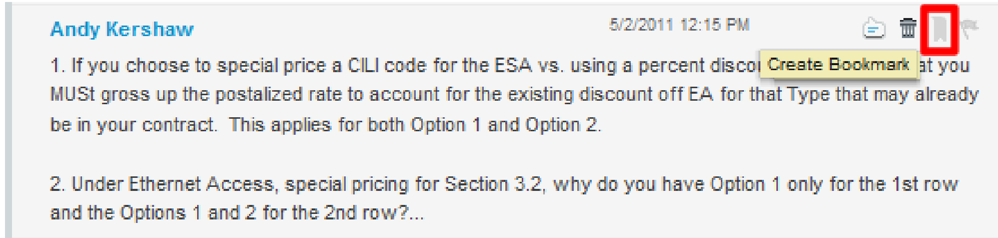
- How Do I Bookmark an Item?
- How Do I Clear a Bookmark?
- How Do I View a List of My Bookmarks?

How Do I Bookmark an Item?

Bookmark an item to add it to your Bookmarks List for quick access and future reference.

To bookmark an item:

1. Navigate to desired conversation.
2. In the Conversation Panel, click the **Create Bookmark** icon next to the item that you want to bookmark.



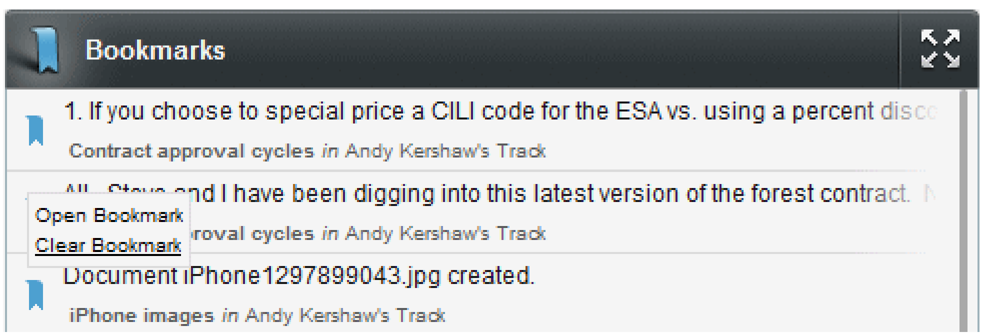
After creating the bookmark, you can find it in your Bookmarks List found in the Information bar. Click any bookmark in the list to quickly access the desired conversation and item.

How Do I Clear a Bookmark?

Clear a bookmark when it is no longer a favorite or an item that you need available for reference. Clearing a bookmark will remove it from your Bookmarks List.

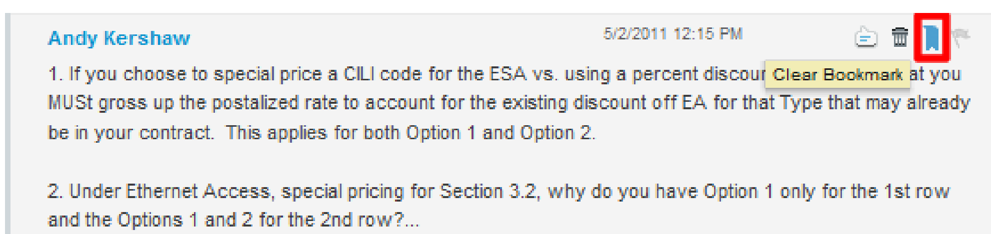
To clear a bookmark:

1. Hover over your Bookmarks List in the On Track Information Bar to display your list of bookmarks.
2. Click on the desired bookmark to navigate to the bookmarked item inside its conversation. Alternatively you may hover over each bookmark icon in the list to access the Bookmark menu. In the Bookmark menu click option **Clear Bookmark** to clear the Bookmark directly from your Bookmarks list.



3. Click the bookmark icon next to the item. This will clear the bookmark.

Once you have cleared a bookmark it will no longer appear in your Bookmark List.

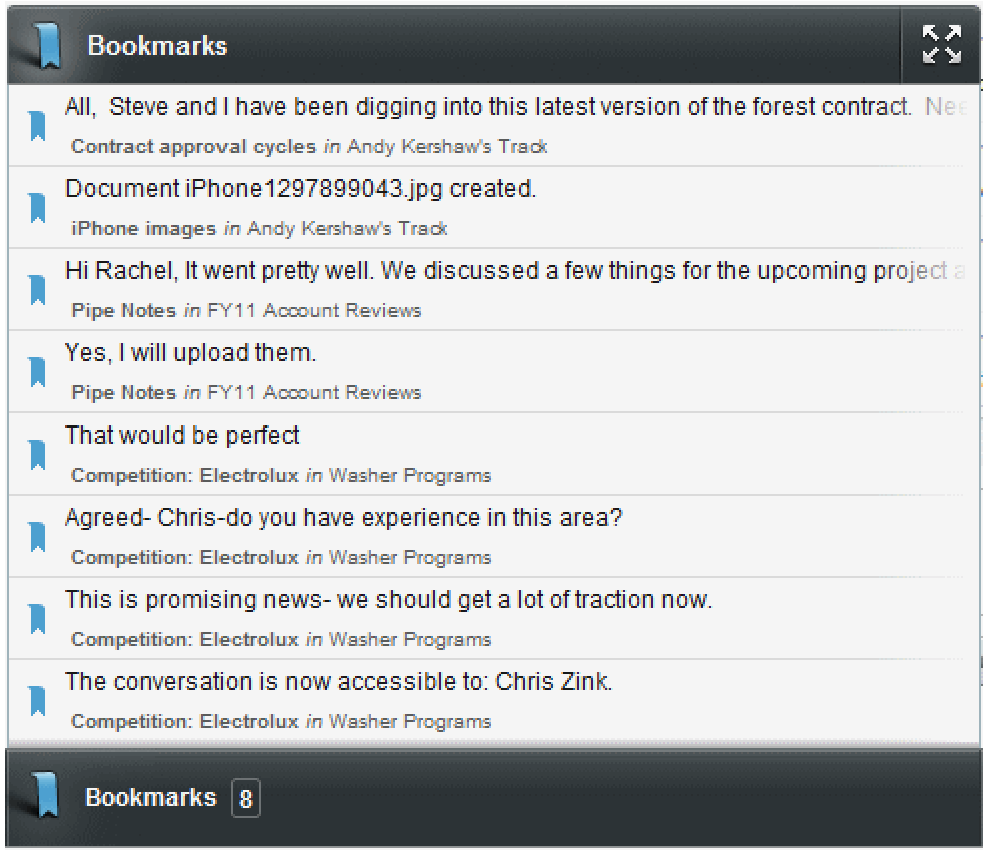


How Do I View a List of My Bookmarks?

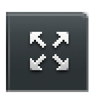
To quickly view and manage any of your stored bookmarks, access your bookmarks list.

To view a list of your bookmarks:

1. Hover over your Bookmarks List in the On Track Information Bar to display your list of bookmarks.

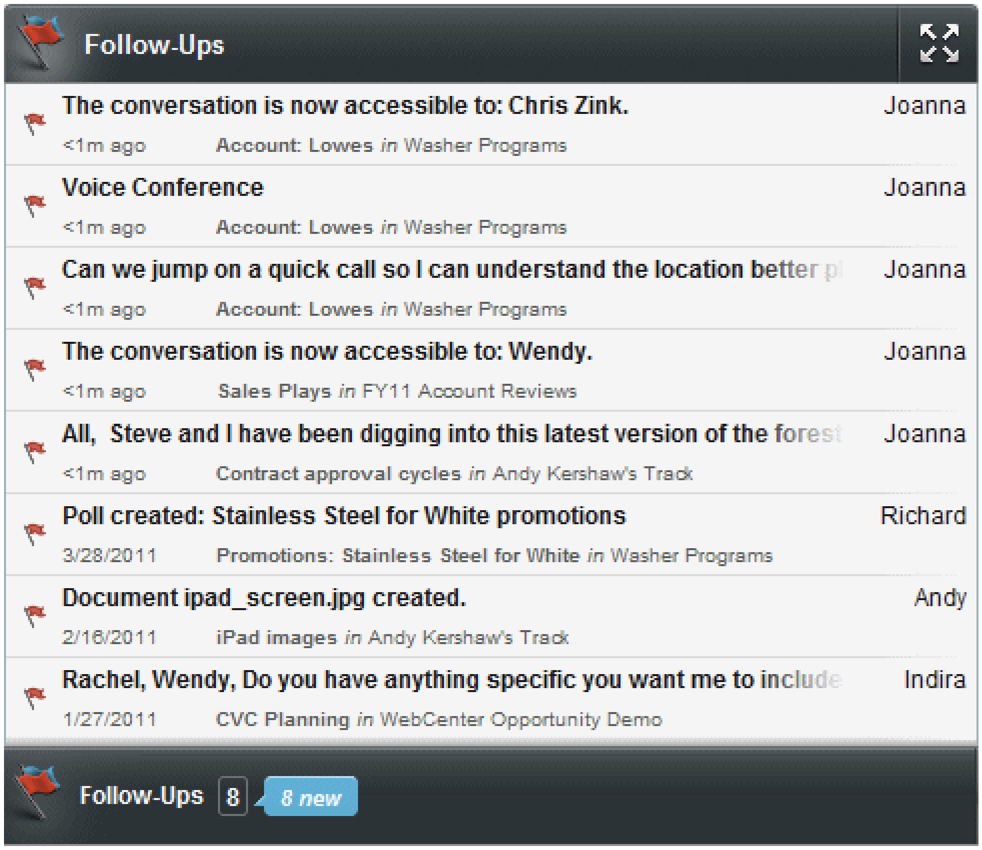


You may click the **Expand** icon to maximize and dock you Bookmarks list into a panel.



Follow-Ups

Assign a follow-up to remind you or other users to pay attention or take action on a particular item. When you or another user assigns a follow up to you, it gets added to your Follow-ups List. You can access your Follow-ups list from the On Track Information Bar.



You can mark for follow-up messages, files, application sharing sessions, voice conferences, polls, and other gadgets in a conversation.

To learn more about Your Follow-ups refer to the following topics:

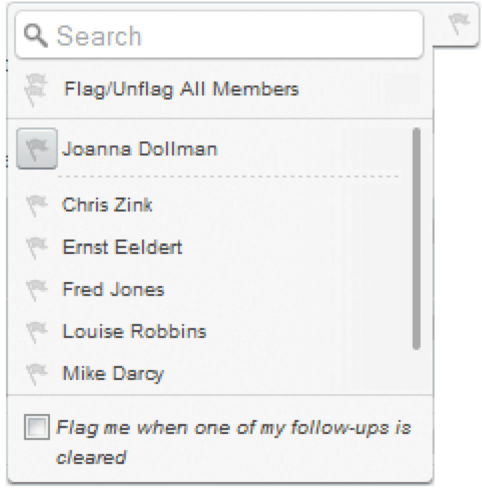
- How Do I Assign Myself a Follow-Up?
- How Do I Assign a Follow-Up to a User?
- How Do I Clear a Follow-Up?
- How Do I Clear a Follow-Up I Assigned to a User?
- How Do I Receive a Notification When a User Clears a Follow-Up I Assigned?
- How Do I View a List of My Follow-Ups?

How Do I Assign Myself a Follow-Up?

Assign yourself a follow-up to add it to your Follow-ups List for quick access and easy future reference when you are ready to take action on it.

To assign yourself a follow-up:

1. Navigate to desired conversation.
2. In the Conversation Panel, locate the item you want to mark for follow-up and click the flag icon next to it to open the **Manage Follow-up** pop-up.
3. Click the flag next to your name. This will assign the follow-up to you.



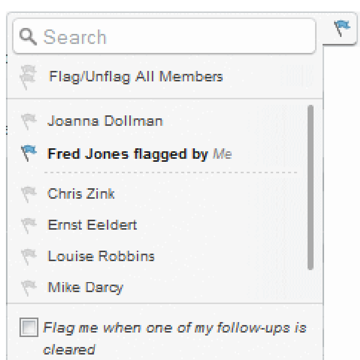
After assigning the follow-up, you can find it in your Follow-ups List found in the Information bar. Click any follow-up in the list to quickly access the desired conversation and item.

How Do I Assign a Follow-Up to a User?

Assign a follow-up to a user to remind him to pay attention or take action on a particular item. When you assign a follow up to a user it gets added to their Follow-ups list and the user receives a notification e-mail if e-mail notifications have been configured accordingly.

To flag a follow-up for a user:

1. Navigate to desired conversation.
2. In the Conversation Panel, locate the item you want to mark for follow-up and click the flag icon next to it to open the **Manage Follow-up** pop-up.
3. Click the flag next to the user name you wish to flag. This will assign the follow-up to the selected user, add it to his follow-ups list, and send him a notification e-mail to inform him of the new follow-up that has been assigned to him.

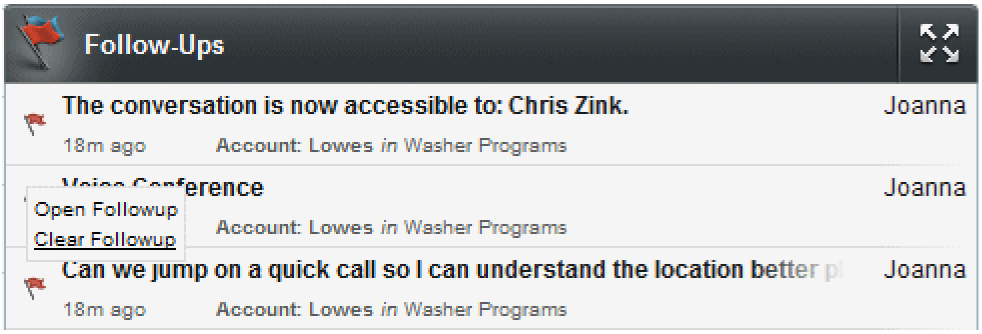


How Do I Clear a Follow-Up?

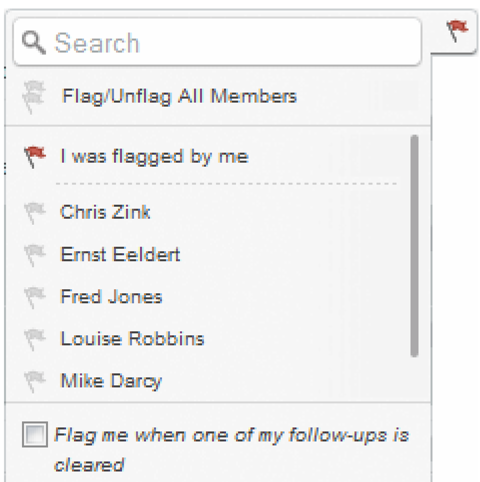
Clear follow-ups assigned to you by yourself or other users when you have completed them and no longer want to see them in your follow-ups list.

To clear a follow-up that has been assigned to you:

1. Hover over your follow-ups list in the On Track Information Bar to display your list of follow-ups.
2. Click on the desired follow-up to navigate to the flagged item inside its conversation. Alternatively you may hover over each follow-up icon in the list to access the Follow-Up menu. In the Follow-Up menu, click option **Clear Follow-Up** to clear the follow-up directly from your Follow-Ups list.



3. Click the flag icon next to the item to open the Manage Follow-up pop-up.
4. Click the red flag next to your name. This will clear the flag.



Once you have cleared any of your follow ups, they will no longer appear in your Follow-ups List. If you clear a follow-up that had been assigned to you by another user, he might have specified to be notified when you cleared his assigned follow up. To learn more about getting notified when a user clears a follow assigned by you see section How Do I Clear a Follow-Up I Assigned to a User?

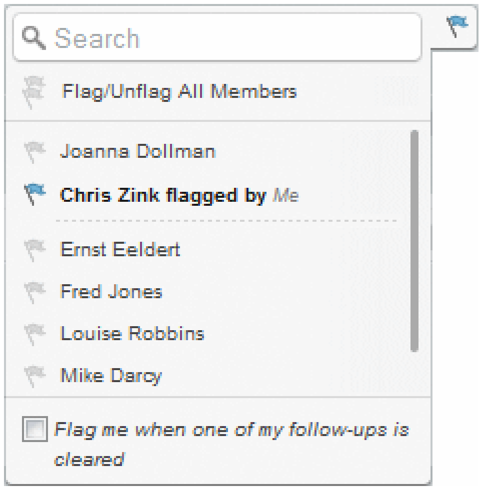
How Do I Clear a Follow-Up I Assigned to a User?

Clear a follow-up assigned to a user by you if you wish to remove it from their follow-ups list either because it is no longer relevant to them or because you flagged them by mistake.

To clear a follow-up that you assigned to a user:

1. Navigate to desired conversation.

2. In the Conversation Panel, locate the item you want to mark for follow-up and click the **flag** icon next to it to open the **Manage Follow-up** pop-up.
3. Click the **flag** next to the user name you wish to un-flag. This will clear the follow-up assigned to the selected user and remove it from his follow-ups list.

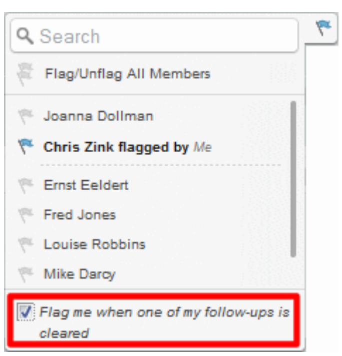


How Do I Receive a Notification When a User Clears a Follow-Up I Assigned?

You can automatically be flagged when a follow-up you assigned to a user is cleared to be informed the flagged item has been taken care of.

To receive a notification when a user clears a follow-up you assigned:

1. Navigate to the desired conversation.
2. Locate the item you assigned for follow-up to a user and click the **flag** icon next to it to open the Manage Follow-up pop-up.
3. Check the option at the bottom of the follow-up pop-up that reads Flag me when one of my follow-ups is cleared.

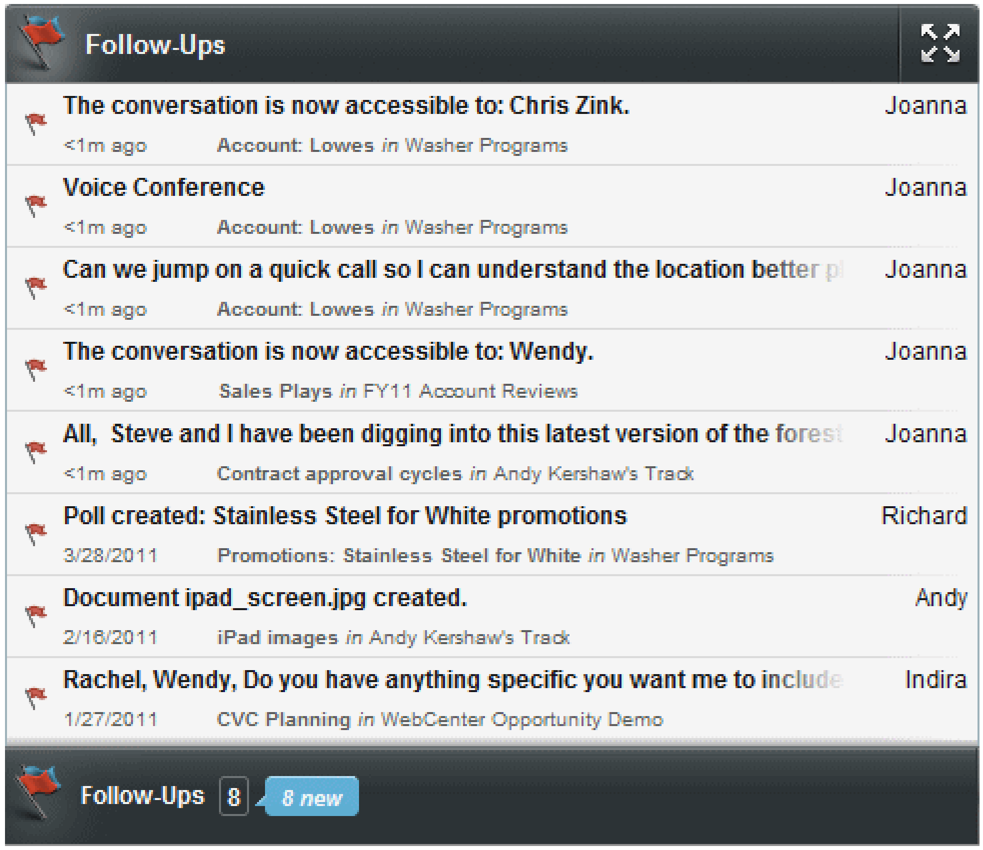


How Do I View a List of My Follow-Ups?

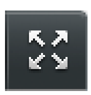
To quickly view and manage any of your assigned follow-ups, access your Follow-ups List.

To view a list of your follow-ups:

1. Hover over your Follow-ups List in the On Track Information Bar to display your list of follow-ups.



You may click the **Expand** icon to maximize and dock you Follow-ups list into a panel.



Search

Search for content in On Track and specify where to look in. Once your search results are displayed, you may also filter using more granular options to facilitate finding the items you need.

To learn more about Search refer to the following topics:

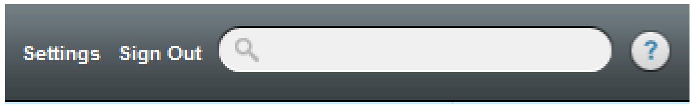
- How Do I Search for Content in On Track?
- What Are the Different Search Filters Available in On Track?

How Do I Search for Content in On Track?

Search for content in On Track by entering a keyword and then choosing where to look in.

To search for content in On Track:

1. In the On Track Header Bar, locate the search box.



2. Place your cursor inside the search box and enter your keyword.
3. As you type your entry, a menu with search filters will appear. To learn how to use this filters see section What Are the Different Search Filters Available in On Track?
4. Select where to search for your keyword by clicking on the filter you desire. To search in All of On Track, select option **in all** or press **Enter.**

Selecting any option in the Search filter will initiate your search. A search filter panel, a search result panel, and a content panel where the selected search result will be displayed will appear in the application.

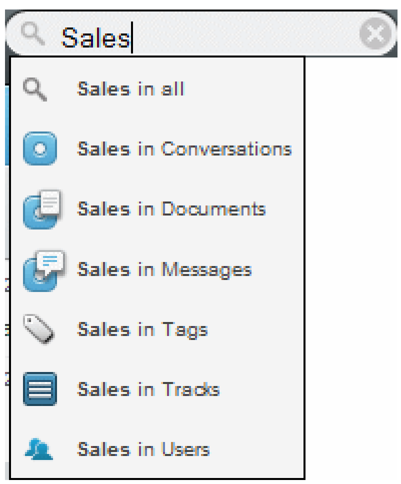
If no search results are found for the term you entered, a message indicating the search for your entry returned no results will appear.

What Are the Different Search Filters Available in On Track?

On Track provides two levels of filtering when searching. The first level lets you determine where in the application you would like to look in when searching for a keyword.

The second level lets you filter your search results to display only items that match characteristics you can set by working with the different filtering dropdowns.

The first level filtering provides the following search options:



In all: Searches for all kind of items in all the different containers available in On Track.

In Conversations: Limits your search results to include only conversations containing the keyword you entered in their name.

In Documents: Limits your search results to include only documents containing the keyword you entered in their name.

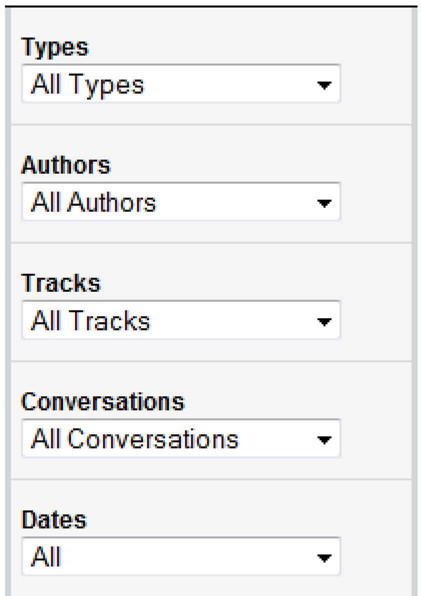
In Messages: Limits your search results to include only messages containing the keyword you entered in their body.

In Tags: Limits your search results to include tags and their related items containing the keyword you entered.

In Tracks: Limits your search results to include only Tracks containing the keyword you entered in their name.

In Users: Limits your search results to include only users containing the keyword you entered in their name.

The second level filtering provides the following options:



Depending on the option you select for the first level filtering, some of these options may not be available.

Types: Lets you filter your search results to only display messages, conversations, or tags. To display all types of items, select All Types from the dropdown.

Authors: Lets you filter your search results to only display items created by a specific author found. All authors found in the search results will be listed in this dropdown. To show items created by all authors, select All Authors from the dropdown.

Tracks: Lets you filter your search results to only display matches found inside specific tracks. All tracks found in the search results will be listed in this dropdown. To show related matches inside all tracks, select All Tracks from the dropdown.

Conversations: Lets you filter your search results to only display matches found inside specific conversations. All conversations found in the search results will be listed in this dropdown. To show related matches inside all conversations, select All Conversations from the dropdown.

Dates: Lets you filter your search results to only display matches created today, within a week, or within a month. To show all related matches regardless of the date when they were created, select All from the dropdown.

Sharing and Collaborating

You and other users can collaborate in On Track by creating and sharing content within conversations. Create and format messages and notes, upload files, playback or start voice and application conferences, or collect votes from members using a poll. You can also share and view entire Web sites inside a conversation and take snapshots of the applications you are using and publish them in a conversation.

Conversations in On Track are persistent forums, so everything you publish in them will be stored for future reference.

To learn more about ways of Sharing and Collaborating in On Track refer to the following topics:

- Messages and Notes
- Documents
- Snapshots of Other Applications
- Application Sharing
- Voice Conferences
- Polls
- Web Sites

Messages and Notes

One of the quickest ways to contribute content to a conversation is posting messages or notes. Use messages if you do not require extensive formatting options. If you require a fully functional text editor, then turn your message into a note and access a more powerful text editor.

To learn more about working with Messages and Notes in On Track refer to the following topics:

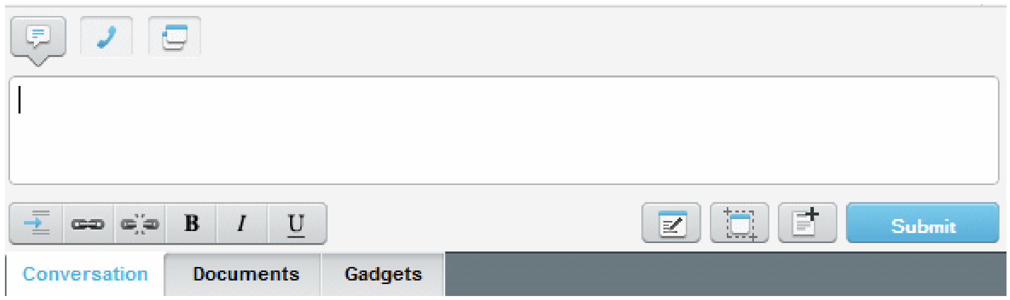
- How Do I Post a Message in a Conversation?
- How Do I Format a Message?
- How Do I Comment on a Message or an Item in a Conversation?
- How Do I Edit a Message?
- How Do I Post a Note in a Conversation?
- How Do I Format a Note?
- How Do I Remove a Message or a Note?

How Do I Post a Message in a Conversation?

Post a message in a conversation to share information with its members in a quick and straightforward manner akin to an e-mail or an instant message. You have a limited but useful set of quick formatting options for messages. To learn more about formatting options available for messages see section How Do I Format a Message?

To post a message in a conversation:

1. Navigate to desired conversation.
2. Locate the message field in the Conversation Panel, and enter a message.



3. Click **Submit** or **Enter** to post the message.

> **Note:** Preferences in your User Settings are set to automatically submit messages when you hit the Enter key. To be able to create new lines in your messages you may use **Shift+Enter.** To modify these preferences and only post messages when you click the Submit button, see section How Do I Change the Way I Submit Messages in a Conversation?

How Do I Format a Message?

Quickly format a message to emphasize some of its content or to include URLs to external Web sites or items inside On Track to better convey an idea.

The following formatting options for messages are available:

Insert Reference: Click to see a list of all the items you can reference in your message, this includes conversations, tracks, and files that are accessible to you inside On Track. Select an item from the list and click Insert. A reference to the selected item will be included in your message in the form of a link. The title of the link corresponds to the name of the item. All members of the conversation will be able to see the name of the link, however only users who have access to the item will be able to click on the reference to see it.

Link: Click to include an actionable link to an external Web site in your message. Insert the web address in the dialog that appears when you select this option and click OK. Users will be able to click the link in your message and navigate to the Web site. The title of the link corresponds to the actual web address you entered. To change the title of a link, type the desired title and select it before clicking the link icon to insert a link.

Unlink: Remove a link to no longer allow users to click it and automatically be taken to the specified web address. Select the active link when you are editing a message and click the Unlink icon. The link title will remain in your message but it will no longer be clickable or active.

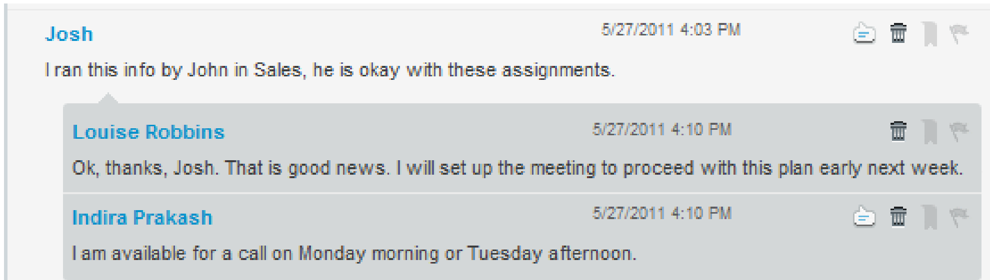
Bold: Select the specific text you wish to format and then click the Bold icon to highlight words in your message.

Italic: Select the specific text you wish to format and then click the Italic icon to emphasize words in your message.

Underline: Select the specific text you wish to format and then click the Underline icon to stress words in your message.

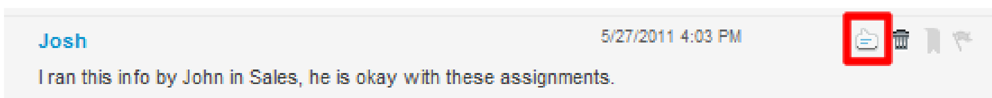
How Do I Comment on a Message or an Item in a Conversation?

that post. Commenting on items will visually organize and group related posts so it is easier to skim through conversations.



To comment on an item:

1. Navigate to desired conversation.
2. Locate the message you want to comment on. In the message header, click on the **Add a Comment** icon.



3. A message field grouped below the selected message appears. Enter your message and click **Submit** or press **Enter** to save and publish your comment.

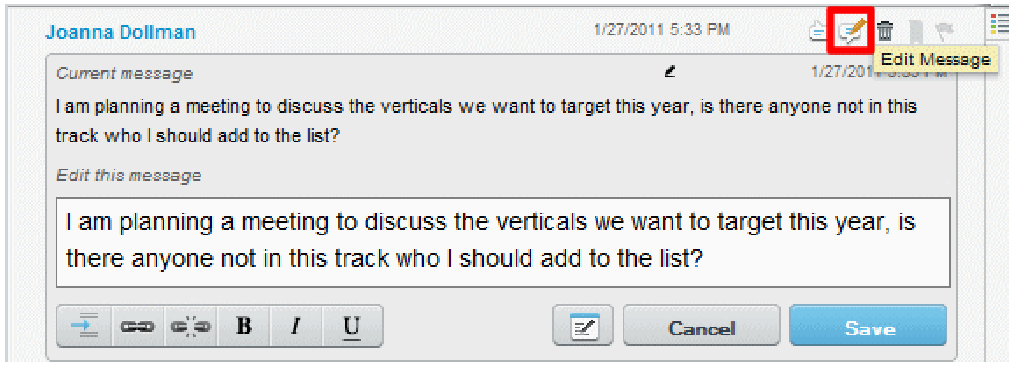
How Do I Edit a Message?

Edit a new message you have posted in a conversation, a comment in response to another message, or a description of an item you shared if you wish to remove information that is not accurate, or you need to correct a mistake.

Only the author of a post may edit its content but other members of a conversation can view all revisions. An author can revise a post any number of times.

To edit a message:

1. Navigate to desired conversation.
2. Locate the message you want to edit. In the message header, click on the **Edit Message/View** Changes icon.



3. A message field with the current message appears. If there are any older revisions of the message they will be listed before the message field.
4. Edit the current message and click **Submit** or press **Enter** to save and publish the new message.

Only the most current revision of the message will be visible to users in the conversation, but anyone can see the change history by clicking the View Changes icon.

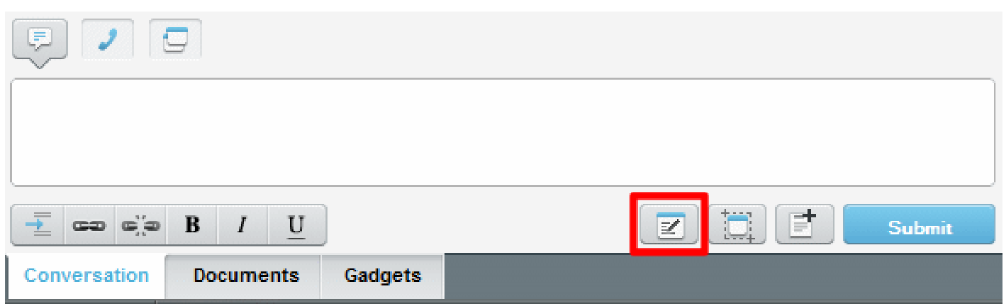
How Do I Post a Note in a Conversation?

Post a note in a conversation to share a fully formatted message with its members. When authoring a note you have a full range of formatting options available to you akin to a powerful word processor.

To learn more about formatting options available for notes see sectionHow Do I Format a Message?

To post a note in a conversation:

1. Navigate to desired conversation.
2. In the Conversation Footer, click the **New Note** icon.

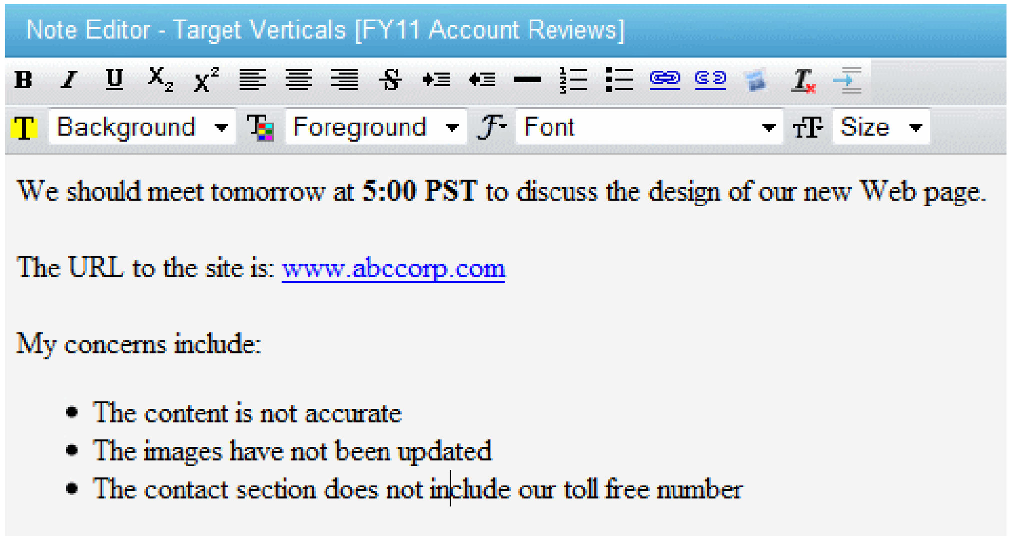


3. A fully-fledged note editor pops up in another window. Enter you note and format it.
4. Click Post when you are ready to submit and publish the note.

How Do I Format a Note?

You may format a note more extensively than you can format a message. The note editor includes most formatting options you can find in a powerful word processor and you may include images, links, and references to other items in On Track. Use notes when you need to share longer and better organized and illustrated messages in your conversations.

The following formatting options for notes are available:



Bold: Select the specific text you wish to format and then click the Bold icon to highlight words in your message.

Italic: Select the specific text you wish to format and then click the Italic icon to emphasize words in your message.

Underline: Select the specific text you wish to format and then click the Underline icon to stress words in your message.

Subscript: Select the specific text you wish to format and then click the Subscript icon to make the selected text appear smaller than the normal text and slightly below it.

Superscript: Select the specific text you wish to format and then click the Superscript icon to make the selected text appear smaller than the normal text and slightly above it.

Justify Left: Select the specific text you wish to format and then click the Justify Left icon to make each line of the selected text begin at the same distance from the left edge leaving the right edge ragged.

Justify Center: Select the specific text you wish to format and then click the Justify Center icon to center each line of the selected text leaving both left and right edges ragged.

Justify Right: Select the specific text you wish to format and then click the Justify Right icon to make each line of the selected text begin at the same distance from the right edge leaving the left edge ragged.

Strikethrough: Select the specific text you wish to format and then click the Strikethrough icon to make a horizontal line appear through the center of the selected text.

Indent: Select the specific text you wish to format and then click the Indent icon to increase the space between the margin and the start of the selected text.

Outdent: Select the specific text you wish to format and then click the Outdent icon to decrease the space between the margin and the start of the selected text.

Horizontal Rule: Click the Horizontal Rule icon to insert a simple line that can act as a visual divider in your page.

Numbered List: Select the specific lines of text you wish to format and then click the Numbered List icon to create a numbered list with the selected text.

Bulleted List: Select the specific lines of text you wish to format and then click the Bulleted List icon to create a bulleted list with the selected text.

Create Link: Click to include an actionable link to an external Web site in your message. Insert the web address in the dialog that appears when you select this option and click OK. Users will be able to click the link in your message and navigate to the Web site. The title of the link corresponds to the actual web address you entered. To change the title of a link, type the desired title and select it before clicking the link icon to insert a link.

Remove Link: Remove a link to no longer allow users to click it and automatically be taken to the specified web address. Select the active link when you are editing a message and click the Unlink icon. The link title will remain in your message but it will no longer be clickable or active.

Insert Image: Click the Insert Image icon to include an image in your note. The image must be referenced from a Web site. Enter the URL of the image in the insert image dialog.

Remove Format: Select the specific lines of text you wish to clear of formatting then click the Remove Format icon. The current font face, font size, font style, text background, and text foreground will be eliminated leaving text in its original and default format.

Insert Reference: Click to see a list of all the items you can reference in your message, this includes Conversations, Tracks, and Files that are accessible to you inside On Track. Select an item from the list and click Insert. A reference to the selected item will be included in your message in the form of a link. The title of the link corresponds to the name of the item.

Text Background: Select the specific text you wish to format and then click the Text Background dropdown to change the color of the background of the selected text.

Text Foreground: Select the specific text you wish to format and then click the Text Foreground dropdown to change the color of the actual selected text.

Font: Select the specific text you wish to format and then click the Font dropdown to change the font face of the selected text.

Size: Select the specific text you wish to format and then click the Size dropdown to change the font size of the selected text.

How Do I Remove a Message or a Note?

Remove a message or an item form a conversation when you no longer want its content to be visible to other members of a conversation. When you remove an item, a system message indicating the name of the user that removed the message is left in place of the original message.

To remove an item from a conversation:

1. Navigate to desired conversation.

2. Locate the item you wish to remove. . In the message header, click the **Remove Message** icon.

3. A message box asking you to confirm you want to remove the item appears. Click **OK** to remove the item.

Documents

Upload, view, download, and annotate all kind of files inside a conversation in On Track to facilitate file sharing and versioning.

To learn more about working with documents in On Track refer to the following topics:

- What Kind of Files Can I Share in On Track?
- How Do I Upload a New Document?
- How Do I Upload a New Version of an Existing Document?
- How Do I Download a Document form a Conversation?
- How Do I Copy a Document to Another Conversation?
- How Do I View a Document in On Track?
- How Do I Add a Tag to a Document in a Conversation?
- How Do I Delete a Tag from a Document in a Conversation?
- How Do I View a List of All Documents in a Conversation?
- How Do I Annotate a Document?
- How Do I Use the Annotation Tools?

What Kind of Files Can I Share in On Track?

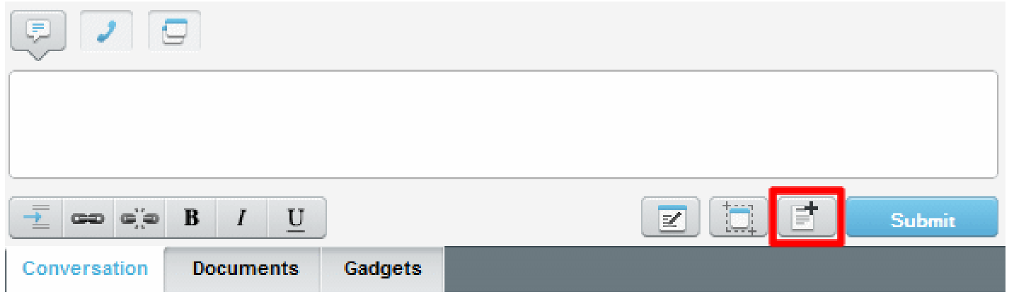
On Track does not have restrictions on the type of files you may upload and share. This includes, but is not limited to, text documents, images, spreadsheets, and presentations.

How Do I Upload a New Document?

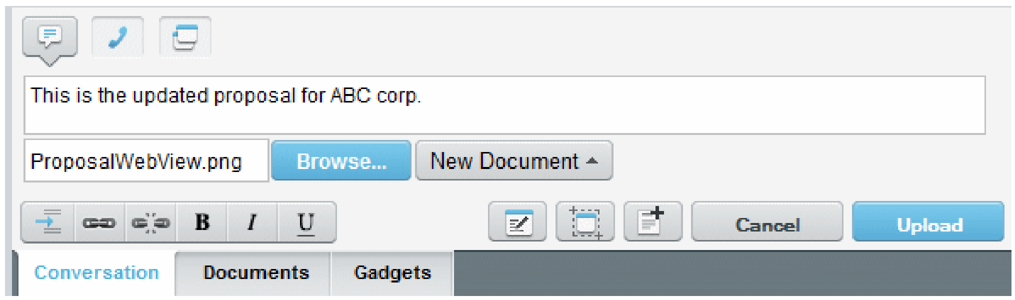
Upload a document or a file to a conversation to store, share, review, and easily manage versioning.

To upload a file to a conversation:

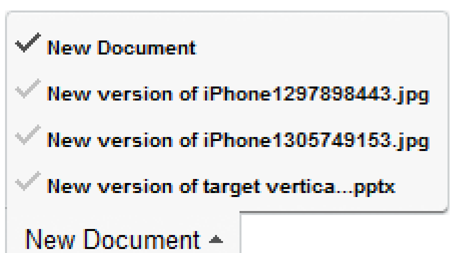
1. Navigate to desired conversation.
2. In the Conversation Footer, click the **Upload a Document** icon. Alternatively you may click on the Documents subtab in the Conversation Footer, and then click the Add Document button.



3. A message field where you can optionally enter a short description about the file appears. Enter your description and click **Browse** to open the file explorer in your computer.



4. Select the file that you want to upload.



5. Select **New Document** from the dropdown next to the **Browse** button.
6. Click **Upload** to submit your file.

A preview thumbnail of the file along with its name, size, and the description you added will appear in the conversation. Users will be able to view, download, and annotate the file.

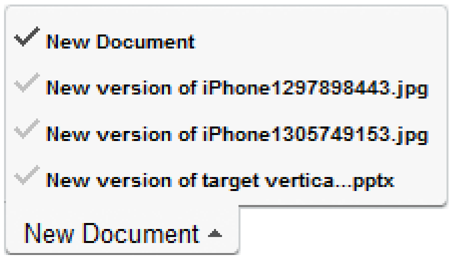
How Do I Upload a New Version of an Existing Document?

Upload a new version of an existing document or file in a conversation and easily manage versioning to keep a history of the evolution of the document readily available. You may upload a file containing a different name than the original file and mark it as a newer version of the same document. When you or another user views an older version of a file in On Track, a message indicating there are newer versions available will be visible to help you find the most recent copy of a file.

To upload a new version of an existing document:

1. Navigate to desired conversation.

2. In the Conversation Footer, click the **Upload a Document** icon.
3. A message field where you can optionally enter a short description about the file appears. Enter your description and click **Browse** to open the file explorer in your computer.
4. Select the file that you want to upload.
5. If the file you are uploading has the same name as a file already in the conversation, On Track will suggest by default that it be uploaded as a new version of the existing document. If the file name is different but it is still a new version of an existing file in the conversation, manually select **New Version of the Document Name** from the dropdown next to the **Browse** button.



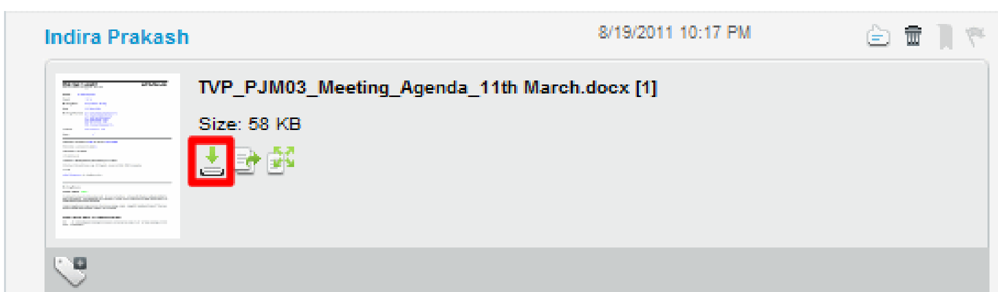
6. You can upload multiple documents at the same time by repeating steps 2-6.
7. Click **Upload** to submit your files.

How Do I Download a Document form a Conversation?

Download a document from a conversation to save a copy of it in your computer or to open it and view using a program in your computer.

To download a document from a conversation:

1. Navigate to desired conversation.
2. Locate the file you wish to download and click the **Download Document** Icon.



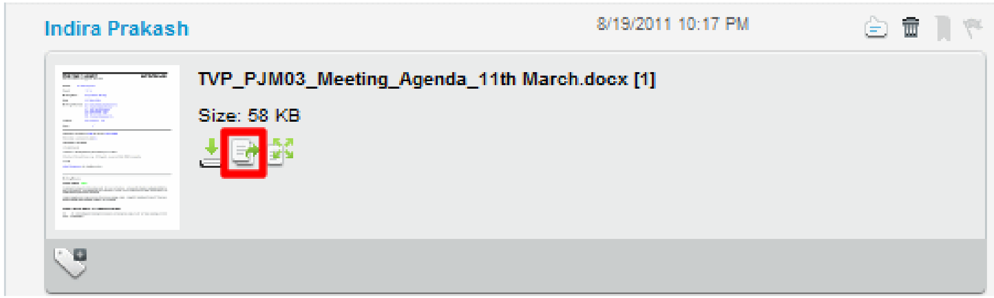
Your computer will ask if you wish to save or open the document. Select the option you desire.

How Do I Copy a Document to Another Conversation?

Copy an existing document or file from a source conversation to another conversation you have access to when you need to share this document in both forums and you do not want to upload the document again. The copied document will evolve as an individual and independent file. Changes to the document in one conversation will not be reflected in the other conversation.

To copy an existing document to another conversation:

1. Navigate to desired conversation.
2. Locate the file you wish to download and click the **Copy To Conversation** Icon.



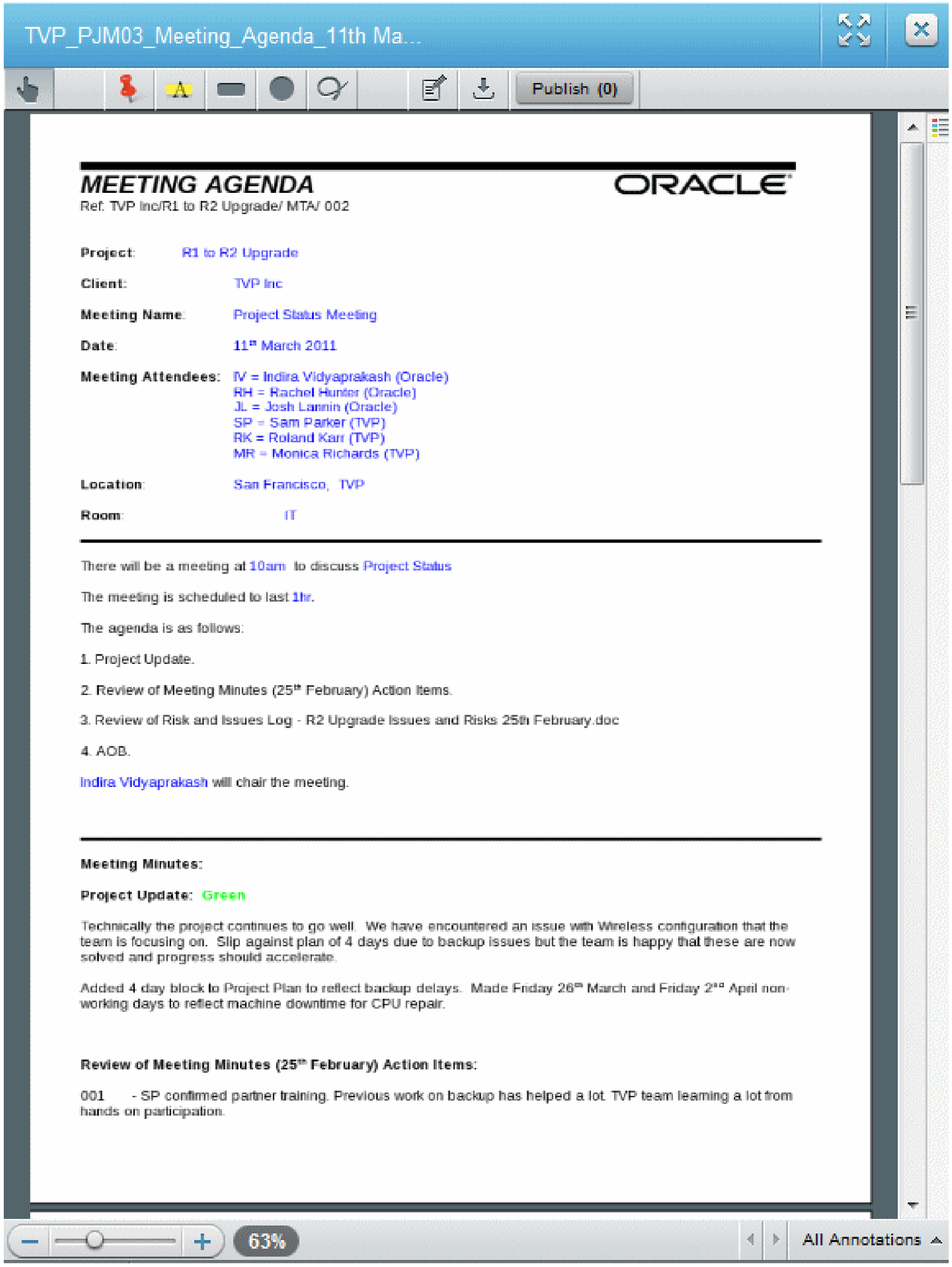
3. The Copy Document dialog appears. Click on the + icon next to a track to expand it and view all conversations inside it.
4. Click on the desired conversation where you want to copy the document.
5. Click **Next** to continue.
6. A dialog showing details about the action you are about to perform appears. Confirm the details and press Copy to submit your request.
7. A message box confirming the document was copied to the selected conversation appears. Click **Yes** to navigate to the destination conversation. Click **No** to dismiss the dialog and stay in the source conversation.

How Do I View a Document in On Track?

View a document in place to quickly load the document content without launching its source application. You may annotate the document or work with the document side by side its conversation.

To view a document in a conversaton:

1. Navigate to desired conversation.
2. Locate the file you wish to view in place and click its preview thumbnail to open it in the Document Viewer Panel next to the conversation.



MEETING AGENDA ORACLE

Ref: TVP Inc/R1 to R2 Upgrade/ MTA/ 002

Project: R1 to R2 Upgrade

Client: TVP Inc

Meeting Name: Project Status Meeting

Date: 11th March 2011

Meeting Attendees: IV = Indira Vidyaprakash (Oracle)
RH = Rachel Hunter (Oracle)
JL = Josh Lannin (Oracle)
SP = Sam Parker (TVP)
RK = Roland Karr (TVP)
MR = Monica Richards (TVP)

Location: San Francisco, TVP

Room: IT

There will be a meeting at 10am to discuss Project Status

The meeting is scheduled to last 1hr.

The agenda is as follows:

1. Project Update.
2. Review of Meeting Minutes (25th February) Action Items.
3. Review of Risk and Issues Log - R2 Upgrade Issues and Risks 25th February.doc
4. AOB.

Indira Vidyaprakash will chair the meeting.

Meeting Minutes:

Project Update: Green

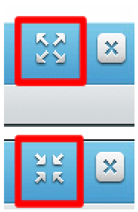
Technically the project continues to go well. We have encountered an issue with Wireless configuration that the team is focusing on. Slip against plan of 4 days due to backup issues but the team is happy that these are now solved and progress should accelerate.

Added 4 day block to Project Plan to reflect backup delays. Made Friday 26th March and Friday 2nd April non-working days to reflect machine downtime for CPU repair.

Review of Meeting Minutes (25th February) Action Items:

001 - SP confirmed partner training. Previous work on backup has helped a lot. TVP team learning a lot from hands on participation.

3. You may click the **Full Screen** icon to expand the document across two panels. In full screen mode, you may click the **Show Conversation** icon to contract the document back into one panel side by side its conversation.

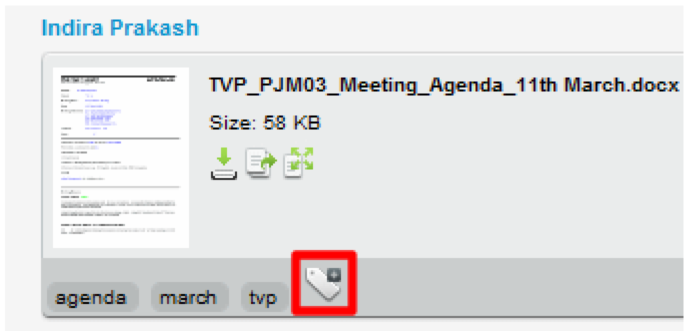


How Do I Add a Tag to a Document in a Conversation?

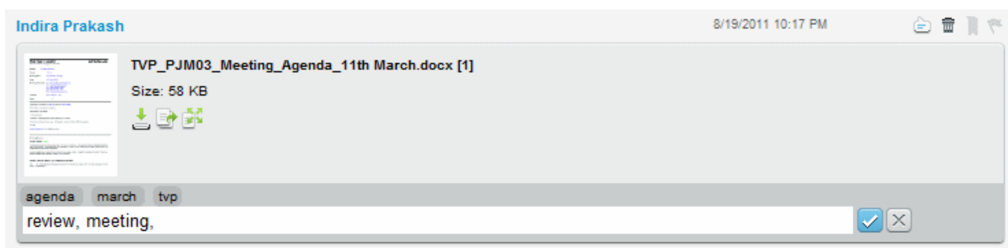
Tags are key words that describe the content of an item. In On Track you may add tags to conversations and files to make it easier for you and other users to find them when searching for certain topics.

To add a tag to a document in a conversation:

1. Navigate to desired conversation.
2. Locate the file you wish to tag and click the **Tags** icon in the document post footer.



3. A textbox appears. If the document has been tagged before, its associated tags will appear listed above the textbox. Enter the tag you want to add.
4. To enter several tags at once, separate them with a comma.



5. Click on the Checkmark icon next to the textbox or hit **Enter** to save the new tags.

Your new tag will appear in the document post footer before the Tags icon. The tag list is ordered alphabetically.

How Do I Delete a Tag from a Document in a Conversation?

Delete a tag from a document if that keyword no longer describes its content and you no longer want the document to appear in search results related to that topic.

To delete a tag from a document:

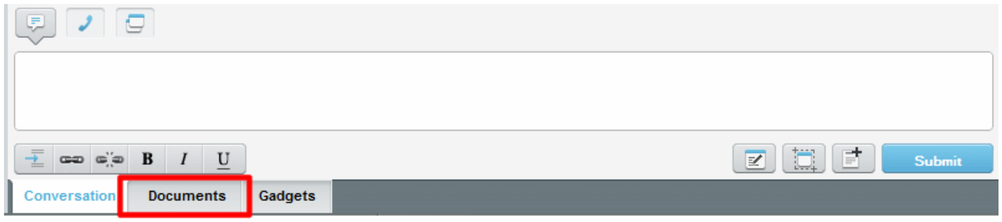
1. Navigate to desired conversation.
2. Locate the file you wish to untag and hover over the tag you wish to delete.
3. An x icon appears next to the tag you are hovering over. Click it to remove the tag.

How Do I View a List of All Documents in a Conversation?

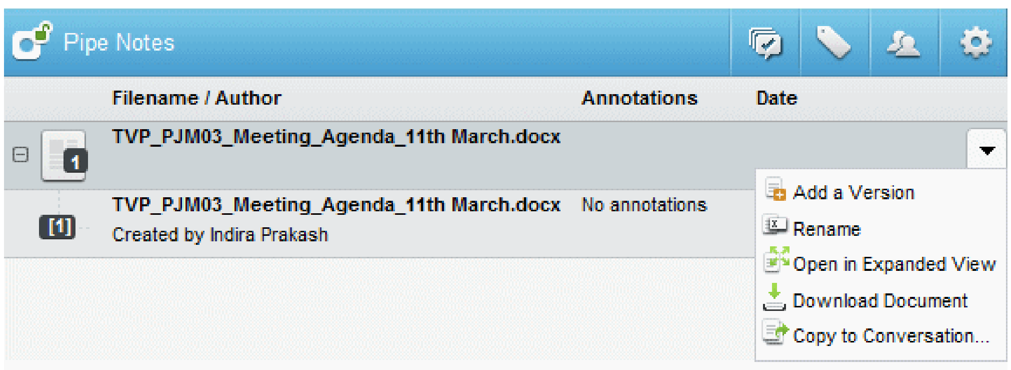
The Documents sub tab in the Conversation Panel footer contains a list of all the files that have been uploaded to the conversation by you or other members. You can use this list to browse and interact with the available documents in the conversation. You may use the document menu in each entry to add a new version of the file, rename the file, open and view the file in On Track, download a copy of the file to your computer, or copy the file to another conversation.

To view a list of all the documents in a conversation:

1. Navigate to desired conversation.
2. Locate the conversation panel footer and click the **Documents** sub tab.



A list of available files in the conversation appears. Versions of the same file will appear grouped under the same name. The number on the document icon indicates the number of versions for that file. You may click the Expand icon to see the list of available versions. You may also interact with each file by hovering over an entry and clicking the down arrow to access their document menu.



How Do I Annotate a Document?

Annotate a document whenever you want to review it and make comments on specific sections of the file for everyone to see. You may use a variety of tools to mark the insertion point of an annotation. To learn more about the different tools available for annotating a document see section How Do I Use the Annotation Tools?

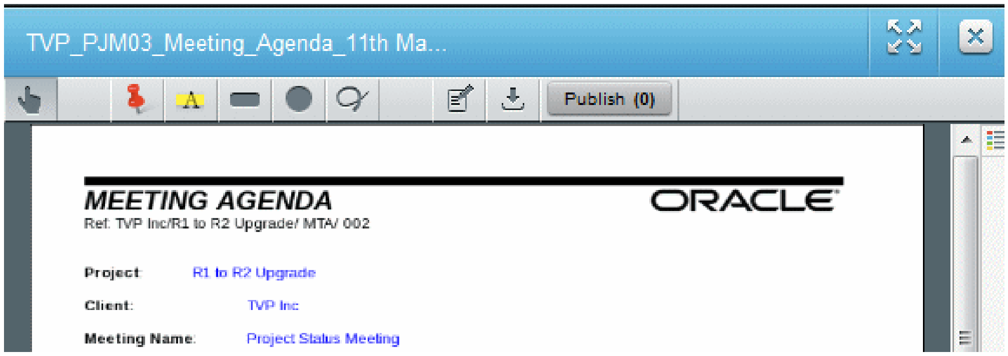
Your annotations are stored with the file you are reviewing and are visible to users when they view the file in On Track. They are also published in the conversation as new annotation messages. Users may comment on your annotations directly in the file or in the conversation.

You may annotate text documents, spreadsheets, images, PDFs, and presentations.

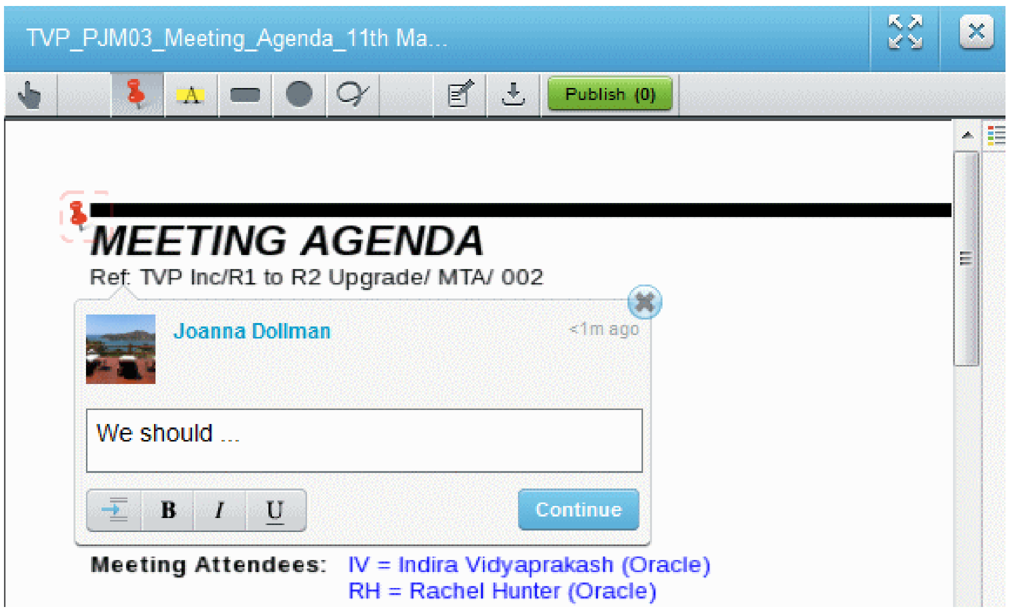
To annotate a document:

1. Navigate to desired conversation.
2. Locate the file you wish to annotate and click its preview thumbnail to open it in the Document Viewer Panel.

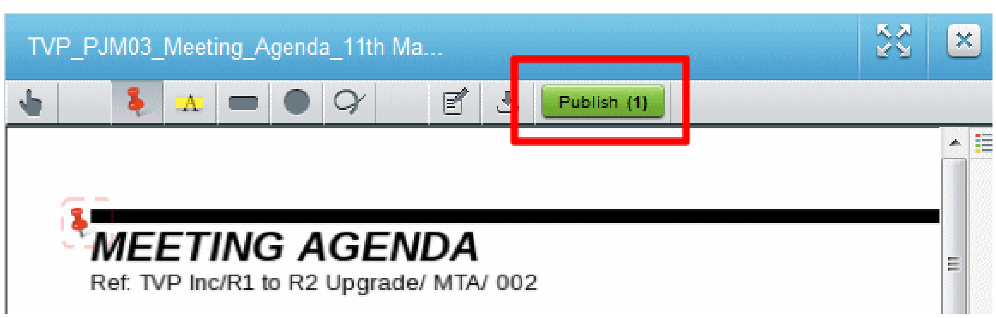
3. Select the annotation tool you need and click on the area in the document where you want to insert your annotation.



4. A message field to type your annotation appears. Enter your annotation.



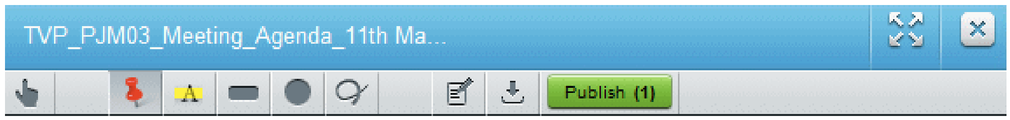
5. Click **Continue** to save your annotation.
6. Repeat steps 3-5 to add more annotations.
7. Once you are done reviewing the document click the Publish button to submit and publish your annotations in the file and in the conversation.



How Do I Use the Annotation Tools?

Use the annotation tool that best helps you mark the information you need to highlight in relation to your comment.

The following annotation tools are available:



Select: Select this tool to be able to navigate, click, drag, and move the document without making annotations.

Pushpin: Select this tool to insert a comment or annotation that is visually indicated by a pushpin.

Highlighter: Select this tool to insert a comment or annotation that is visually indicated by a highlighted area.

Rectangle: Select this tool to insert a comment or annotation that is visually indicated by a rectangle.

Circle: Select this tool to insert a comment or annotation that is visually indicated by a circle.

Pen: Select this tool to insert a comment or annotation that is visually indicated by a free stroke.

Download: Click this icon to download the file you are reviewing. The annotations you have made will not be visible in the file you download. Annotation can only be seen when the file is viewed inside On Track.

Publish: Click this button when you are done reviewing the file and are ready to submit and publish your annotations.

Snapshots of Other Applications

You can use On Track to quickly take a screenshot of any of your running applications and share it in a conversation.

To use the Add a Snapshot feature you require the Oracle On Track Real-Time Plug-In

to be installed. This plug-in enables functionality for taking snapshots and starting application sharing sessions using On Track. To learn more about installing this plug-in see section What is the Oracle On Track Real-Time Plug In?

To learn more about working with Snapshots refer to the following topics:

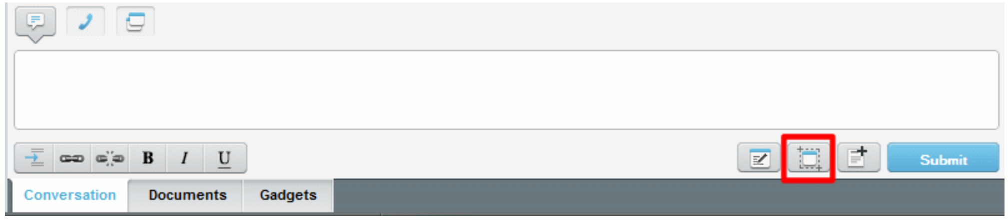
- How Do I Take a Snapshot of My Screen and Share it in a Conversation?

How Do I Take a Snapshot of My Screen and Share it in a Conversation?

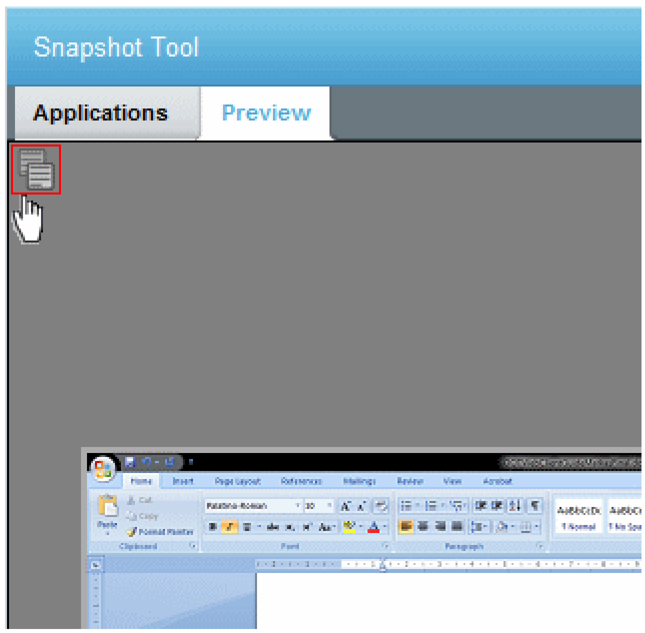
Take a snapshot of any of your running applications to quickly share static images of what you are looking at in your screen with members of a conversation. This is an easy way to share parts of a web site or snippets of an image.

To take a snapshot of your screen and share it in a conversation:

1. Navigate to desired conversation.
2. In the Conversation Footer, click the **Add a Snapshot** icon.



3. The Snapshot Tool Panel opens and a list of the applications and windows currently open on your machine will appear. Click the **Expand** icon next to each application to see all windows of the same application that are open.
4. Select the thumbnail of the window you wish to snapshot. A screenshot preview of the selected application will appear in the Snapshot Tool Panel Preview sub tab.
5. Use the selection tool if you wish to select only a specific part of the screenshot to share.



6. Click the **Snapshot** icon in the Snapshot Tool panel header to share the selected area of the screenshot in the conversation.

Application Sharing

Start an application sharing session to have other members of a conversation see your activity in that window in real-time and walk them through a presentation or show them a demo. This is akin to holding a web conference but the voice conference is started separately. To learn how to start a voice conference in a conversation see section How Do I Start a Voice Conference in a Conversation?

Application sharing sessions are automatically recorded and stored in the conversation for easy playback and reference.

To use the Application Sharing feature you require the Oracle On Track Real-Time Plug-In to be installed. This plug-in also enables functionality for taking snapshots. To learn more about installing this plug-in see section What is the Oracle On Track Real-Time Plug In?

Note: Per Legal requirements, Voice Conferences and Application Sharing Sessions held using Oracle On Track Communication internal release 1.0.5 will not be recorded.

To learn more about working with application sharing sessions refer to the following topics:

- How Do I Start an Application Sharing Session in a Conversation?
- How Do I Share a Microsoft Office PowerPoint Presentation Running in Slideshow Mode?
- How Do I Join an Ongoing Application Sharing Session in a Conversation?
- How Do I Playback an Application Sharing Session in a Conversation?

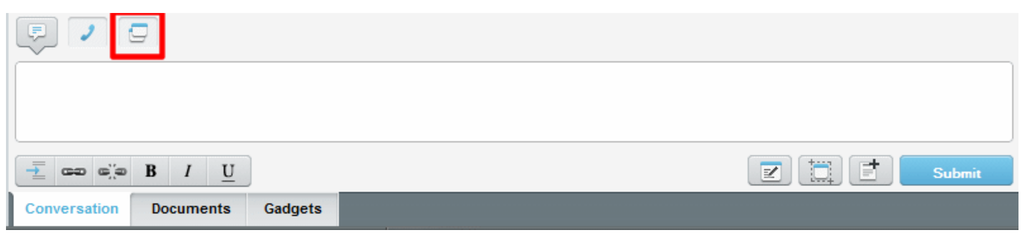
How Do I Start an Application Sharing Session in a Conversation?

Start an application sharing session or a web conference in a conversation to have other members join and see your window in real-time while they optionally join a voice conference.

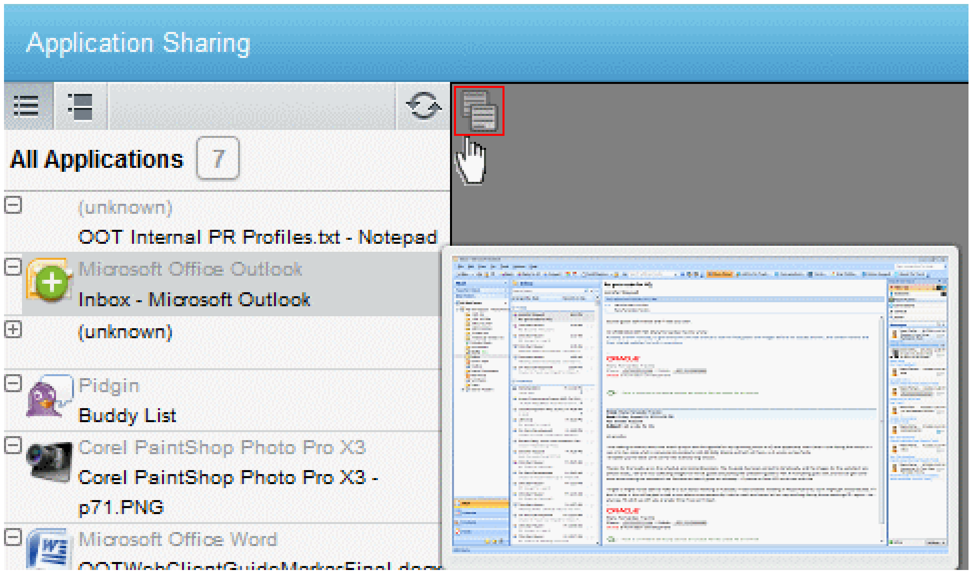
Only one application sharing session per conversation is allowed. The previous presenter needs to end their session to allow another user to start a new application sharing session in the same conversation.

To share an application in conversation:

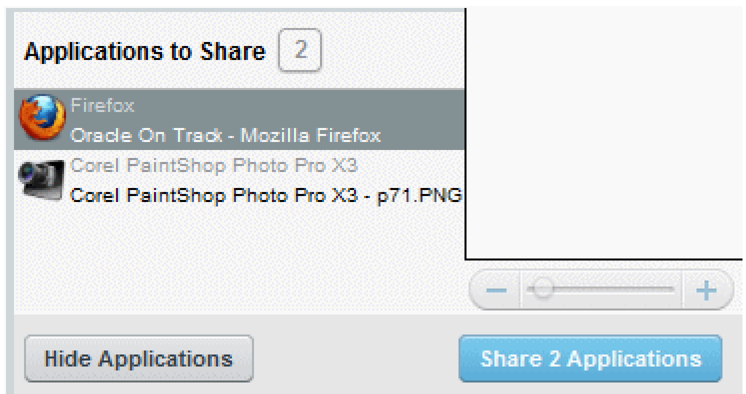
1. Navigate to desired conversation.
2. In the conversation panel footer, click the **Share an Application** icon.



3. A list of all the applications open on your machine appears in the Application Sharing Panel
4. Hover over each application to see a thumbnail of each screen and select the application you wish to share by clicking on the green + icon.



5. The selected application will now appear under the Applications to Share area. You may add more than 1 application to share.



6. When you are done selecting the applications you wish to share, click the **Share Applications** button in the Application Sharing Panel Footer.
7. If you are sharing more than one application in your session, change the application you want the conversation members to see by selecting the correct one in the Applications to Share area.
8. Navigate to the selected application and maximize it to start working with the application you are sharing. Users will see your work in real-time if they join your session.
9. To stop sharing and end the session, click the **End Session** button in the Application Sharing Panel Footer.

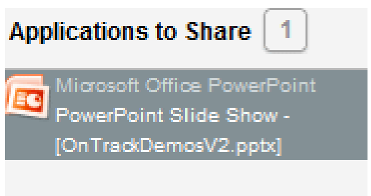
This will discontinue the sharing session. The recorded session will automatically be posted to the conversation and available for playback.

How Do I Share a *Microsoft Office PowerPoint* Presentation Running in Slideshow Mode?

Start an application sharing session specifically to walk members through a presentation running in slideshow mode.

To share a *Microsoft Office PowerPoint* (PowerPoint) presentation running in slideshow mode:

1. Open your presentation in PowerPoint.
2. Start running the slideshow full screen.
3. Use Alt+Tab to switch between windows to On Track.
4. Navigate to desired conversation.
5. In the conversation panel footer, click the **Share an Application** icon.
6. A list of all the applications open on your machine appears in the Application Sharing Panel.
7. Locate the PowerPoint entry. You will see two instances of PowerPoint running. Hover over each one and use the preview thumbnail to determine which instance is the one running in slideshow mode. Click on the green + icon to select the correct one.
8. The selected application will now appear under the Applications to Share area.



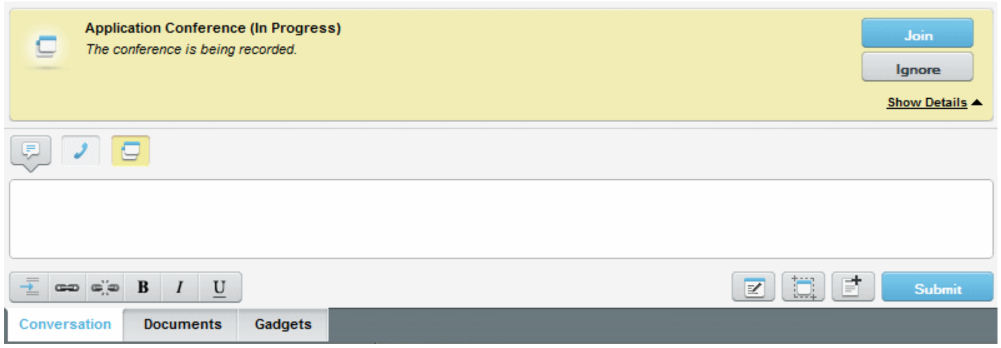
9. Click the Share Applications button in the Application Sharing Panel Footer.
10. Use **Alt+Tab** to switch back between windows to PowerPoint and start advancing the slideshow. Users will see all animations and interactions in the presentation in real-time if they join your session.
11. To stop sharing and end the session, use **Alt+Tab** to switch back to On Track and click the **End Session** button in the Application Sharing Panel Footer.

How Do I Join an Ongoing Application Sharing Session in a Conversation?

Join an ongoing application sharing session in a conversation you are a member of to be able to see in real-time the application screen another member is currently sharing.

To join an ongoin application sharing session in a conversation:

1. Navigate to desired conversation.
2. In the Conversation panel you will see a post with information about the Application Sharing session that is in progress. Click the **Join** button.



3. The Application Sharing panel appears. The application that is being shared by the member who initiated the session will be displayed in this area. You will see any activity happening on the shared application in real-time.

You can zoom in to view the shared application in more detail. Uncheck the option Lock Zoom on Windows Size and use the zoom bar to zoom in and out as required.

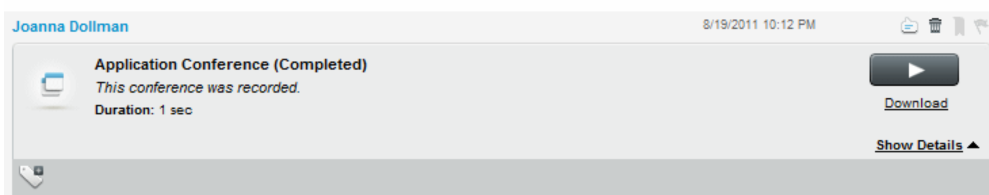
To leave the application sharing session and close the Application Sharing panel to return to the conversation, click the Close button in the Application Sharing panel header.

How Do I Playback an Application Sharing Session in a Conversation?

Playback a past application sharing session stored in a conversation at your convenience if you were not able to join the session live.

To playblack an application sharing session in a conversation:

1. Navigate to desired conversation.
2. Locate the application conference completed post and click the **Play** button.



3. The Application Sharing panel appears. The application conference that was recorded is played back in this area.

To stop playing back the recorded application conference and close the application sharing panel to return to the conversation, click the Close button in the Application Sharing panel header.

Voice Conferences

Start a voice conference and have other members of a conversation join the phone call. You may optionally run an application sharing session at the same time to hold a fully-fledged web conference from your own desk. To learn how to start an application sharing session see section How Do I Start an Application Sharing Session in a Conversation?

On Track is a call out system and requires you to enter the phone number you would like to be called at. Voice conferences are automatically recorded and stored in the conversation for easy playback and reference.

Note: Per Legal requirements, Voice Conferences and Application Sharing Sessions held using Oracle On Track Communication internal release 1.0.5 will not be recorded.

To learn more about working with voice conferences refer to the following topics:

- How Do I Start a Voice Conference in a Conversation?
- How Do I Join an Ongoing Voice Conference in a Conversation?
- How Do I Disconnect from a Voice Conference I Have Joined?
- How Do I Playback a Voice Conference in a Conversation?

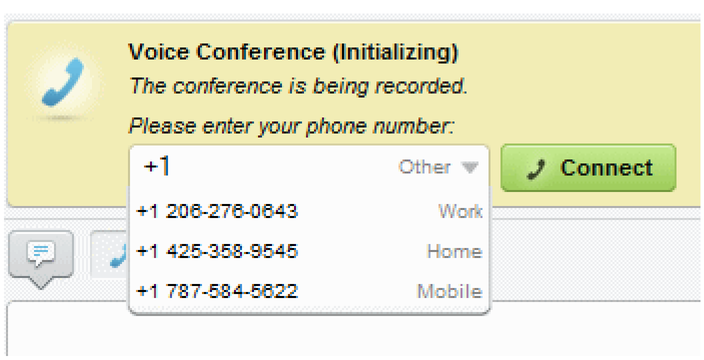
How Do I Start a Voice Conference in a Conversation?

Start a voice conference and discuss an issue collectively and in real-time with other members of a conversation while ensuring there is a record left for later reference by members who missed the call.

To start a voice conference:

1. Navigate to desired conversation.
2. In the Conversation Panel Footer, click the **Start Voice Conference** icon.

3. Click **Start Voice Conference** above the message entry area.
4. A yellow Voice Conference banner will pop up above the Conversation Panel Footer with information about the phone call you are about to initiate. Enter the phone number where you can be reached for the call or click the down arrow to select one of the numbers you have setup in your profile.



5. Click **Enter** to have On Track call you. Answer the call in your phone and listen to the welcome message.

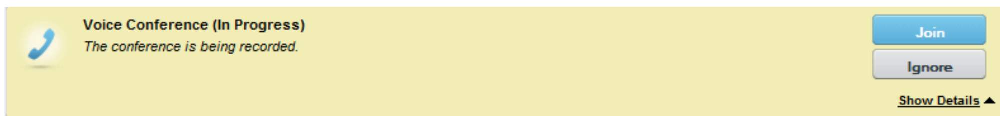
After the welcome message finishes playing, the voice conference begins recording immediately and a yellow voice conference in progress banner appears in the conversation footer. All members of the conversation are able to see a list of all the participants that have joined the call. They can join the voice conference by clicking on the Join button.

How Do I Join an Ongoing Voice Conference in a Conversation?

Join an ongoing voice conference initiated by another member of a conversation to participate collectively in the phone call with other participants.

To join an ongoing voice conference:

1. Navigate to desired conversation.
2. Locate the Voice Conference yellow banner above the Conversation Panel Footer and click **Join.**



3. Enter the phone number where you can be reached to take the call.

4. Answer the call in your phone and listen to the welcome message.

After the welcome message finishes playing you will be joined into the voice conference in progress.

To disconnect from the voice conference, hang up your phone or click **Disconnect** on the screen.

How Do I Disconnect from a Voice Conference I Have Joined?

Disconnect from a voice conference you have joined when you are done participating in it and want to hang up.

To disconnect from a voice conference you have joined:

1. Hang up your phone or click **Disconnect** in the yellow voice conference in progress banner in the conversation footer.

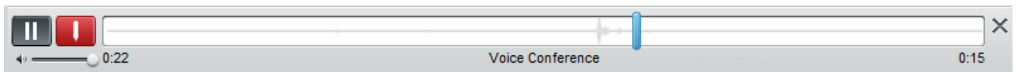
Once all members disconnect, the voice conference will appear in the conversation as a post showing information about the duration of the call, a list of all the members who participated in it, and a playback button.

How Do I Playback a Voice Conference in a Conversation?

Playback a past voice conference stored in a conversation if you were not able to join the call live or to review the issues discussed at your convenience.

To playback a voice conference in a conversation:

1. Navigate to desired conversation.
2. Locate the voice conference completed post and click the **Play** button.
3. The voice conference that was recorded is played back in the Conversation Panel. Playback controls to interact with the recording will appear in the Conversation Panel footer.



To close the voice conference playback controls, click the **Close** button.

Polls

Polls in On Track are an easy way to collect and visualize voting data from members in a conversation.

To learn more about working with polls in On Track refer to the following topics:

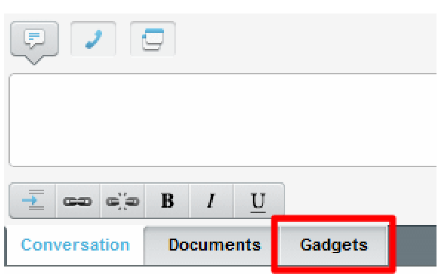
- How Do I Start a Poll in a Conversation?
- How Do I End a Poll in a Conversation?
- How Do I Remove a Poll from a Conversation?
- How Do I Vote in a Poll?

How Do I Start a Poll in a Conversation?

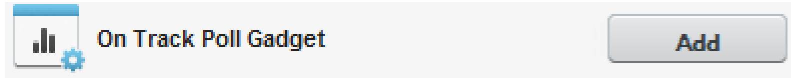
Start a poll by adding the On Track poll gadget to a conversation. This gadget will allow other members in the conversation to vote selecting one of the options you provided. As the voting progresses, you will be able to see partial results.

To add the On Track Poll Gadget:

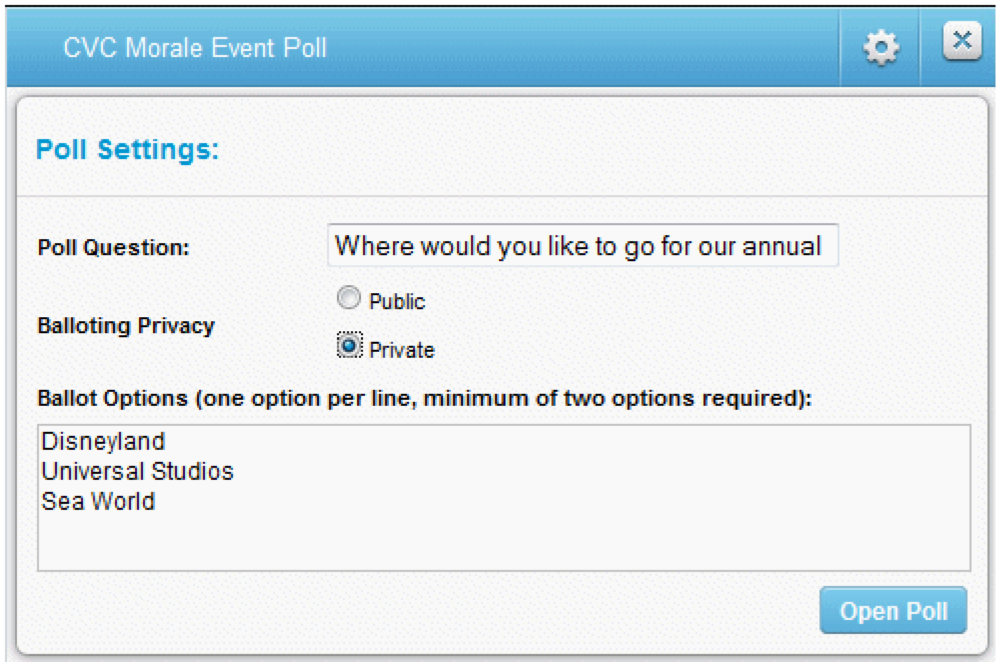
1. Navigate to desired conversation.
2. In the Conversation Panel Footer, click the **Gadgets** sub tab to access a list of available gadgets.



3. Click **Add** next to On Track Poll Gadget to start creating a poll.



4. The Add Gadget dialog appears. Enter a name for your poll and click **OK**.
5. The Poll Settings Panel opens.



6. Enter the poll question.
7. Select the balloting privacy: choose Private to reveal only voting totals to other members of the conversation. Choose Public to reveal individual votes submitted by members.
8. Enter the Ballot Options: a minimum of two options is required. Enter only one option per line.
9. Click **Open Poll** to start the poll.

The Poll Panel will open displaying the poll you created. You may cast your vote by clicking one of the available options.

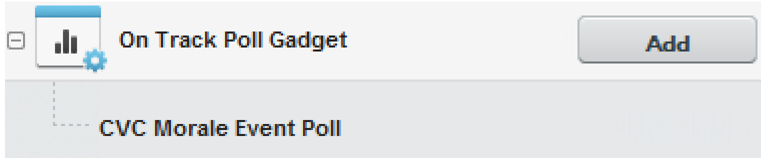
Once the poll is open it will appear in the conversation as a post and all members of the conversation will be assigned a follow-up as a reminder to vote. The poll cannot be modified once it is opened.

How Do I End a Poll in a Conversation?

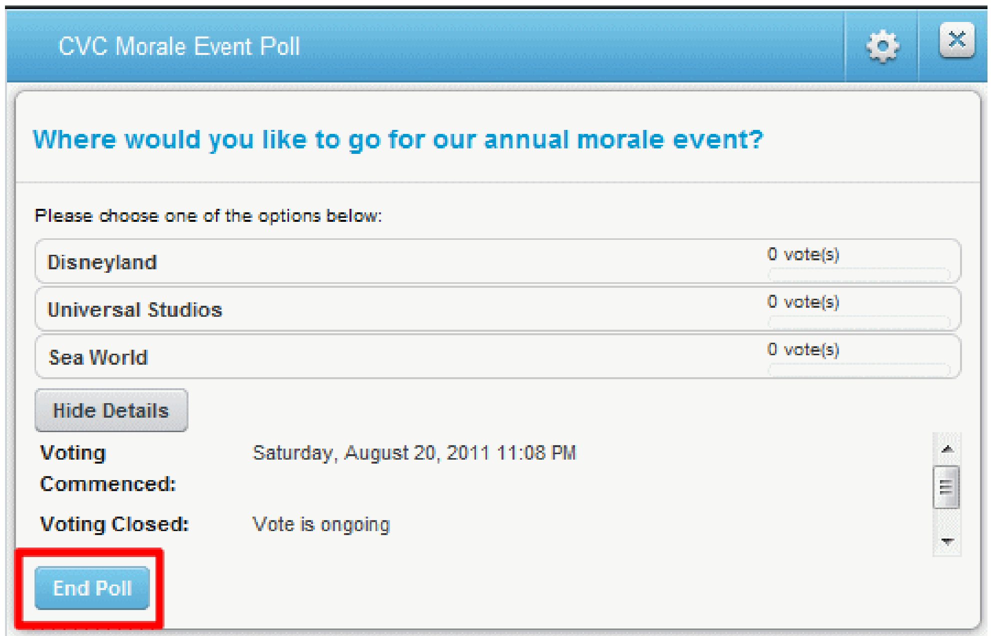
End a poll when you have already collected enough votes from members in a conversation and would like to close the poll for voting and publish final results.

To end a poll in a conversation:

1. Navigate to desired conversation.
2. In the Conversation Panel Footer, click the **Gadgets** sub tab to access a list of available gadgets and their instances.



3. Locate the poll you wish to end in the list of available polls and click on it to select it and load it in the Poll Panel.
4. In the Poll Panel, click **View Details**.
5. Click **End Poll**.



6. A message box warning you are about to end the poll and no more votes from any users will be allowed appears. Click **OK** to confirm the warning and end the poll.

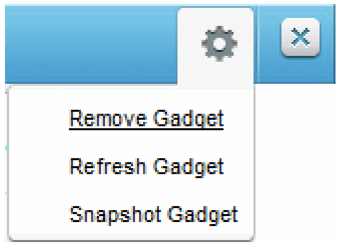
The poll will close and results will appear in the Poll Panel and in the conversation as a post. No more voting will be allowed but poll details and information will still be accessible to members of a conversation.

How Do I Remove a Poll from a Conversation?

Remove a poll from a conversation when you no longer want the poll details, access, or results to be accessible to users.

To remove a poll from a conversation:

1. Navigate to desired conversation.
2. In the Conversation Panel Footer, click the **Gadgets** sub tab to access a list of available gadgets and their instances.
3. Locate the poll you wish to remove from the conversation in the list of available polls and click on it to select it and load it in the Poll Panel.
4. In the Poll Panel, click the Poll Settings icon to access the **Poll Settings** menu.



5. Select option **Remove gadget.**
6. A message box asking you to confirm you want to remove the selected poll appears. Click **Yes** to confirm the warning and remove the poll.

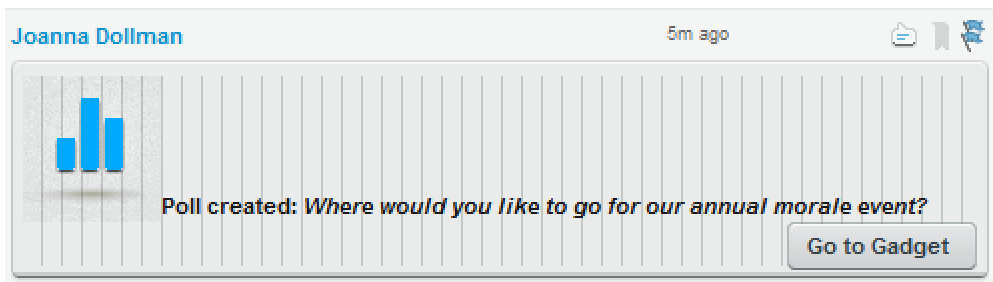
Poll details for the selected gadget will be deleted. The poll post in the conversation will still be visible to members, but if they try to access the gadget a message box alerting them the poll has been removed will appear.

How Do I Vote in a Poll?

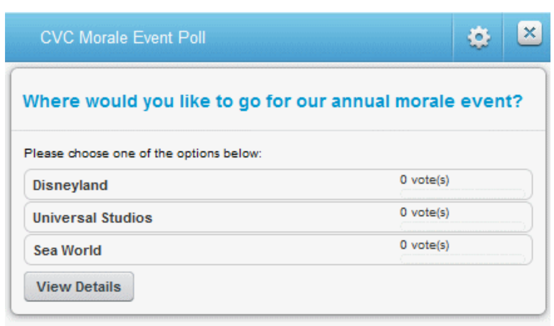
Participate in a poll created by another user by casting your vote before the owner decides to close the poll for voting.

To vote in a poll:

1. Navigate to desired conversation.
2. In the Conversation Panel, locate the desired Poll post.
3. Click **Go To Gadget** to load the poll details in the Poll Panel.



4. Click one of the options provided to select and confirm your vote.



Your vote will be instantly reflected in the poll's partial results. You may change your vote by repeating the steps above and selecting your new choice before the owner of the poll closes the poll for voting.

Web Sites

Share entire Web sites in a conversation to let members quickly browse through them side-by-side a conversation without having to close On Track.

To learn more about sharing Web sites in On Track refer to the following topics:

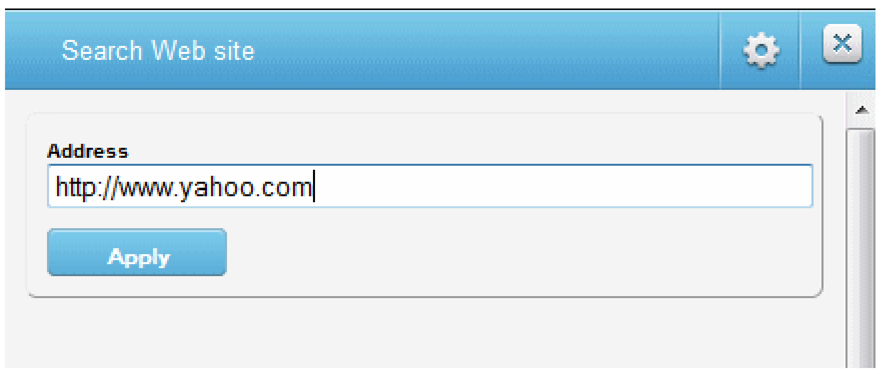
- How Do I Share an External Web Site Inside a Conversation?
- How Do I Change the Address to a Web Site in an External Site Gadget?
- How Do I Remove an External Site from a Conversation?

How Do I Share an External Web Site Inside a Conversation?

Share a Web site in a conversation by adding a External Site Gadget. Members will be able to browse through the selected Web site side-by-side with the conversation to be able to reference information from both sources at the same time without having to switch between windows.

To share an external Web site inside a conversation:

1. Navigate to desired conversation.
2. In the Conversation Panel Footer, click the **Gadgets** sub tab to access a list of available gadgets.
3. Click **Add** next to On Track External Site Gadget to start configuring related settings.



4. The Add Gadget dialog appears. Enter a name to identify the Web site you are about to share and click **OK**.
5. Enter the address to the Web site you would like to share in the format: http://www.example.com
6. Click Apply to publish the selected External site gadget.

The External Site Panel will display the selected Web site and a post will appear in the conversation to inform members an external site has been published.

How Do I Change the Address to a Web Site in an External Site Gadget?

Change the address to the current Web site an external site gadget is pointing to whenever you need to update the URL because it has changed or because it was not entered correctly.

To change the URL in an external site gadget:

1. Navigate to desired conversation.

2. In the Conversation Panel Footer, click the **Gadgets** sub tab to access a list of available gadgets and their instances.
3. Locate the External site gadget you wish to edit in the list of available sites and click on it to select it and load it in the External Site Panel.
4. In the External Site Panel, click the **Settings** icon to access the external site settings menu.

5. Select option Edit Gadget Settings.
6. A dialog box showing the current URL to the site appears. Delete the current entry and enter the new Web site address.
7. Click **Save** to confirm the changes.

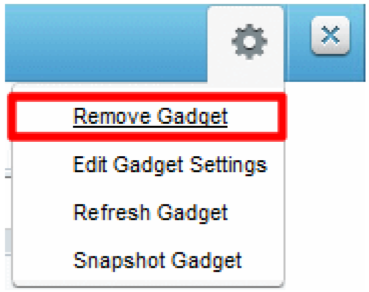
The new address is instantly updated and the External Site Panel will immediately display the new Web site selected.

How Do I Remove an External Site from a Conversation?

Remove an external site shared in a conversation if you no longer want other members to access the site within On Track.

To remove an external site from a conversation:

1. Navigate to desired conversation.
2. In the Conversation Panel Footer, click the **Gadgets** sub tab to access a list of available gadgets and their instances.
3. Locate the External site gadget you wish to edit in the list of available sites and click on it to select it and load it in the External Site Panel.
4. In the External Site Panel, click the **Settings** icon to access the external site settings menu.
5. Select option Remove Gadget.



6. A message box asking you to confirm you want to remove the selected External site from the conversation appears. Click **Yes** to confirm your choice.
7. A message box confirming the selected external site has been removed from the conversation appears. Click **OK** to dismiss the message box.

The original external site post that appeared in conversation when you first created the gadget will still be visible to members, but if they try to access the gadget, a message box alerting them the external site has been removed appears.

Interacting with People

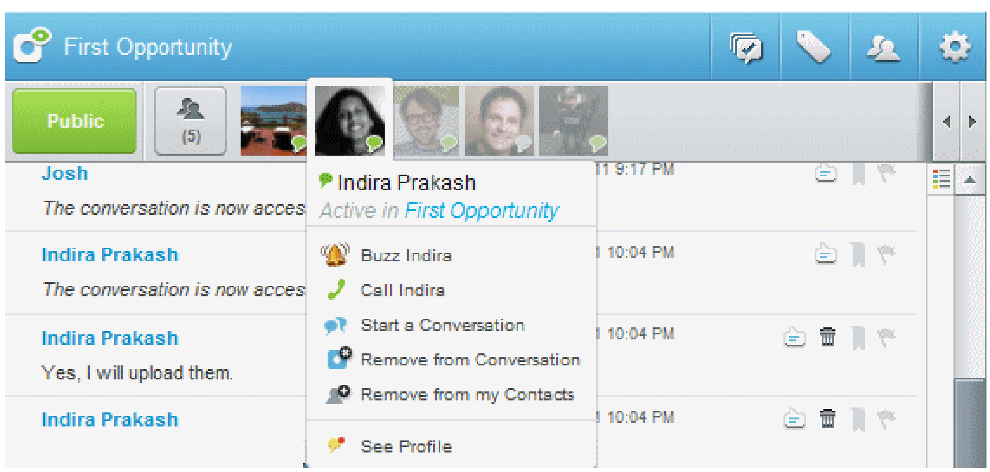
Interact with individual users or add them to your contacts to facilitate frequent collaboration. Create groups and lists to reach out to many people at once easily and quickly.

To learn more about interacting with people in On Track refer to the following topics:

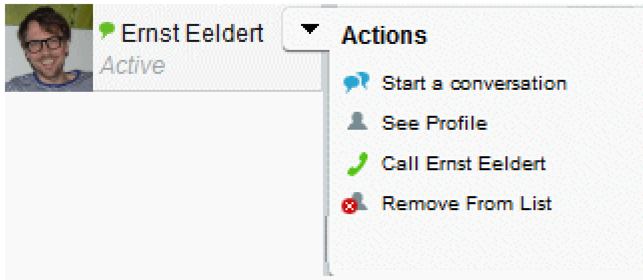
- Users
- Groups
- Lists

Users

You may interact with users even if you have not added them to your Contacts Pane. Hover over any profile picture in a Conversation Membership bar to access a User Menu that will let you interact with that person.



Add users to your Contacts Pane to facilitate frequent interaction with them. To access a contact's User Menu, hover over the contact and click on the dropdown arrow.



To learn about interacting with contacts and users, refer to the following topics:

- How Do I Find and Add a User to My Contacts Pane?
- How Do I Remove a Contact from My Contacts Pane?
- How Do I Start a Conversation with a Contact or a User?
- How Do I View a Contact or a User Profile?
- How Do I Call a Contact or a User?
- How Do I Buzz a User?
- How Do I Add Members to a Conversation?
- How Do I Remove Members from a Conversation?

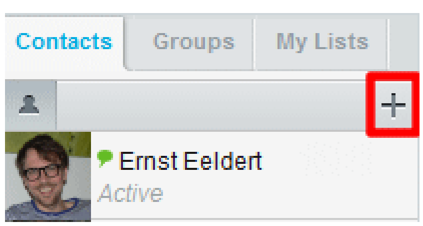
How Do I Find and Add a User to My Contacts Pane?

Add users to your Contacts Pane to be able to quickly start conversations with them, access their profile in fewer clicks, and readily see if they are currently active in a shared conversation or offline.

Adding users to your Contacts Pane is immediate and does not require approval from them. Because users are not notified of your request to add them to your Contacts Pane, you will not automatically appear in their Contacts Pane unless they explicitly add you.

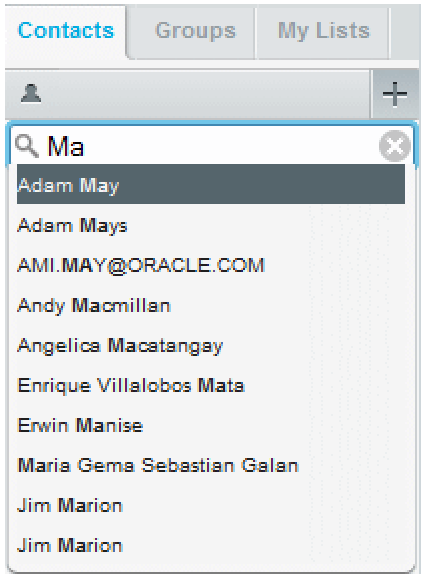
To find and add a new contact:

1. In the **Contacts** Pane, click the + button to search for users.



2. In the search box, enter the name or the e-mail address of the user you want to add. As you are typing, autosuggest will populate a list of potential matches.
3. Select the name or e-mail address corresponding to the user you want to add from the list.

4. The new contact immediately shows up in your Contacts Pane.
5. If search is not successfully completed, click the **Contacts** button to go back to your Contacts Pane.



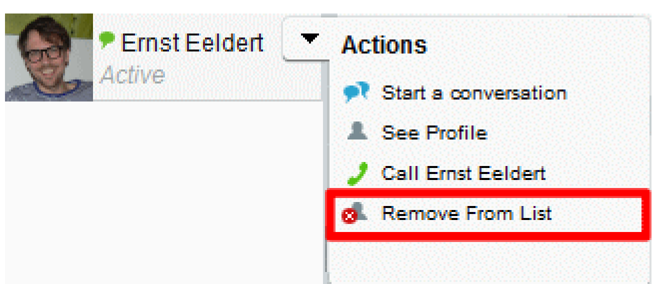
How Do I Remove a Contact from My Contacts Pane?

Remove users from your Contacts Pane if you no longer need to have quick access to their status and interaction options. You will still be able to interact with users that have been removed from your Contacts Pane.

Removing contacts from your Contacts Pane is immediate and private. Affected users are not notified of your removal. Removing a user form your Contacts Pane will not automatically remove you or block you from theirs.

To remove a contact:

1. In the **Contacts** Pane, hover over the contact you want to remove.
2. Click the dropdown arrow that appears to the right of the contact to see its interaction options.

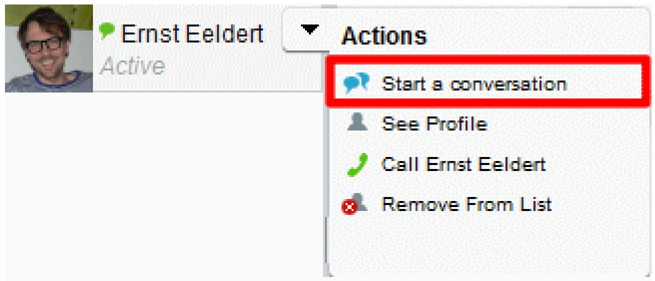


3. Select Remove from list.
4. The contact is immediately removed from your Contacts Pane.

How Do I Start a Conversation with a Contact or a User?

You can quickly start a private conversation with a contact or a user to discuss a side issue or collaborate together in that forum.

1. If you have added the user to your Contacts Panel, hover over the contact and click the dropdown arrow to access its User Menu.
2. If the user is not in your Contacts Panel, hover over its profile picture in any Conversation Membership bar to access its User Menu.
3. Select Start a conversation.



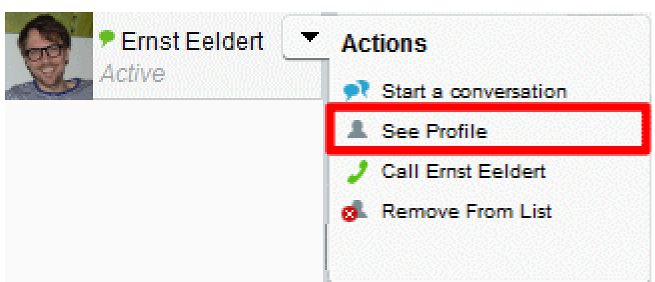
To start a conversation with a contact or a user:

A private conversation between you and the selected user is created inside your own private Track. To change the default conversation name see section How Do I Change the Name of a Conversation?

How Do I View a Contact or a User Profile?

View a contact or a user profile to access information they have shared about them including their profile picture, email address, language, time zone, and description.

1. If you have added the user to your Contacts Pane, hover over the contact and click the dropdown arrow to access its User Menu.
2. If the user is not in your Contacts Pane, hover over its profile picture in any Conversation Membership bar to access its User Menu.
3. Select See Profile.



To view a contact or a user profile:

How Do I Call a Contact or a User?

Start a phone call with a contact or a user using On Track and record it in a conversation. If you are calling a user from an existing conversation, other members in the conversation will be able to see you are in a voice conference with the selected user and will be able to join you. If you are calling a contact directly from your Contacts panel, On Track will automatically create a private conversation between the selected user and yourself, and then prompt you for dialing information to place the call.

The contact or user you are calling must have setup at least one phone number in his profile settings for On Track to automatically place the call.

To call a contact or a user:

1. If you have added the user to your Contacts Panel, hover over the contact and click the dropdown arrow to access its User Menu.
2. If the user is not in your Contacts Panel, hover over its profile picture in any Conversation Membership bar to access its User Menu.
3. Select Call User. If you are calling a contact, On Track will create and open a new private conversation between the selected contact and yourself. If you are calling a user directly from an existing conversation, the voice conference will initiate in that same conversation.
4. A yellow Voice Conference banner will pop up above the Conversation Panel footer with information about the phone call you are about to initiate. Enter the phone number where you can be reached for the call or click the down arrow to select one of the numbers you have setup in your profile.
5. Click **Connect** to have On Track call you. Answer the call in your phone and listen to the welcome message.
6. When the welcome message finishes playing, select the number where you want to call the participant.
7. Click **Connect** to have On Track call the participant.

When the participant receives the call, a welcome message will be played. When the message finishes playing, you will be connected to the participant in a recorded voice conference. Other members of the conversation will be able to see and join the conference.

How Do I Buzz a User?

Buzz a conversation member to call the attention of a user and indicate you would like their participation in a particular conversation. When you buzz a user a flashing orange notification will appear in the user follow-ups list. The user also receives a buzz notification e-mail with easy access to the related conversation if e-mail notifications have been configured accordingly.

To buzz a user:

1. Navigate to desired conversation.
2. In the Conversation Membership bar, locate the user you want to buzz and hover over its profile picture to access its User Menu.
3. Select Buzz User to send the notification to the user.

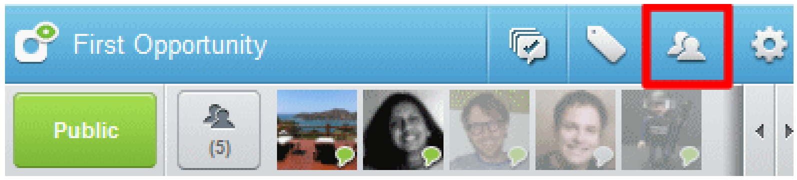
The user may click on the notification or on the e-mail notification to quickly access the conversation where his participation is solicited.

How Do I Add Members to a Conversation?

Add users to a conversation to have them collaborate with your in that forum. Users that have been added to a conversation become members and can add other users to it.

To add members to a conversation:

1. Navigate to desired conversation.
2. In the Conversation Panel header, click the **Add Members** icon.



3. The Update Members of Conversation dialog box appears. Your contacts, groups, and lists will appear in the People selection box to the left. Select the people you would like to add.
4. To add people not shown in the People selection box, enter an e-mail address or name in the search box and select the user you would like to add from the autosuggest list that will automatically populate as you type.
5. Click the right arrow to move the selected people in the People selection box to the Members selection box.
6. Click **Add.**

The new users that you added to the Members selection box are now able to view and make contributions in your conversation.

How Do I Remove Members from a Conversation?

Remove members from a conversation to no longer have them collaborate in that forum or receive updates about it in their daily e-mail digest.

To remove members from a conversation:

1. Navigate to desired conversation.
2. In the conversation header, click the **Add Members** icon.
3. The Update Members of Conversation dialog box appears. Your contacts, groups, and lists will appear in the People selection box. All members of a conversation will appear in the Members selection box. Select the members you would like to remove.
4. Click the left arrow to move the selected people to the to the People selection box.
5. Click **OK**.
6. A message box asking you to confirm you want to delete the number of members you selected from the conversation appears. Click **Yes.**
7. Selected people will no longer be able to contribute content to the conversation. If the conversation is Private, they will no longer see it. If the conversation is Public, they will be able to see and join it again.

Groups

You can easily manage multiple people by creating Groups or Lists and adding them or removing them from conversations in a few clicks. The difference between Groups and Lists is that Groups are shared, public, and dynamic while Lists are private and static.

All members of a group will be able to see the group in their Groups panel. When you or others add or remove a user from a group, the selected user will gain or lose access to all the conversations the group belongs to.

When you create a list, you are the only user who can see it in your My Lists panel. If you remove members from your list they will still have access to previous conversations you added the list to. If you add new members to your list, they will not have access to previous conversations you added the list to.

To learn more about working with groups please refer to the following topics:

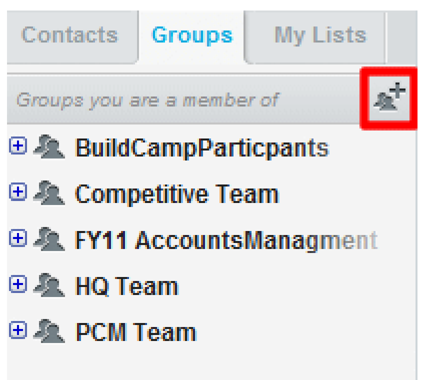
- How Do I Create a Group?
- How Do I Edit a Group?
- How Do I Delete a Group?

How Do I Create a Group?

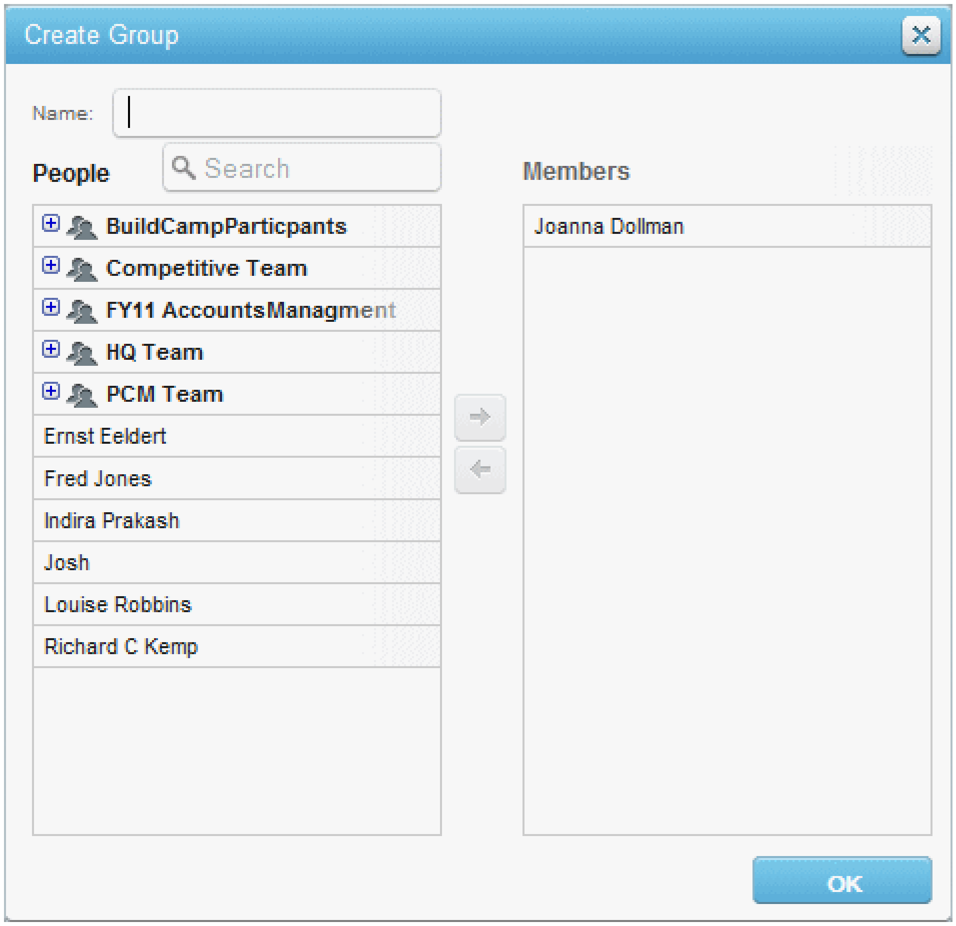
Create a new group to easily manage multiple users at the same time and create conversations among them or share documents with them in fewer clicks.

To create a new group:

1. In the **Groups Panel**, click the + button to add a new group.



2. The Create Group dialog appears. Enter a name for your group.



3. Your contacts, groups, and lists will appear in the People selection box to the left. Select the people you would like to add to your new group.
4. To add people not shown in the People selection box, enter an e-mail address or name in the search box and select the user you would like to add from the autosuggest list that will automatically populate as you type.
5. Click the right arrow to move the selected people in the People selection box to the Members selection box where you will automatically be listed as a member.
6. Click **OK.**

If there is an existing group with the name you entered, even if you are not a member and cannot see the group, a message box informing you the group name is already in use will appear. Click OK to go back to the Create Group dialog and modify your group name.

If there are no duplicate groups found, the new group you created will appear in your Group panel.

Because groups are public, all members of a group will be able to see it listed in their Group panel and interact with the group.

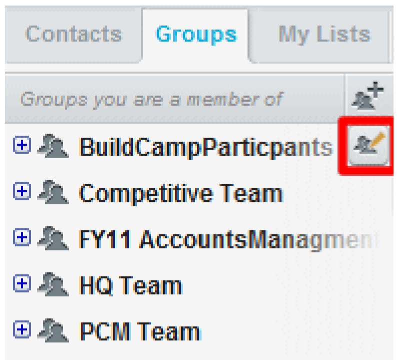
How Do I Edit a Group?

Edit a group if you want to add or remove members or change its name. Removing members from a group will remove the selected users from all the conversations the group has previously been added to. Those users will no longer see the group listed in their Groups panel.

Adding new members to a group will automatically add them to conversations the group was added to in the past.

To edit a group:

1. In the Groups Panel click on the **Edit Group** icon that appears when you hover over the group you want to edit.



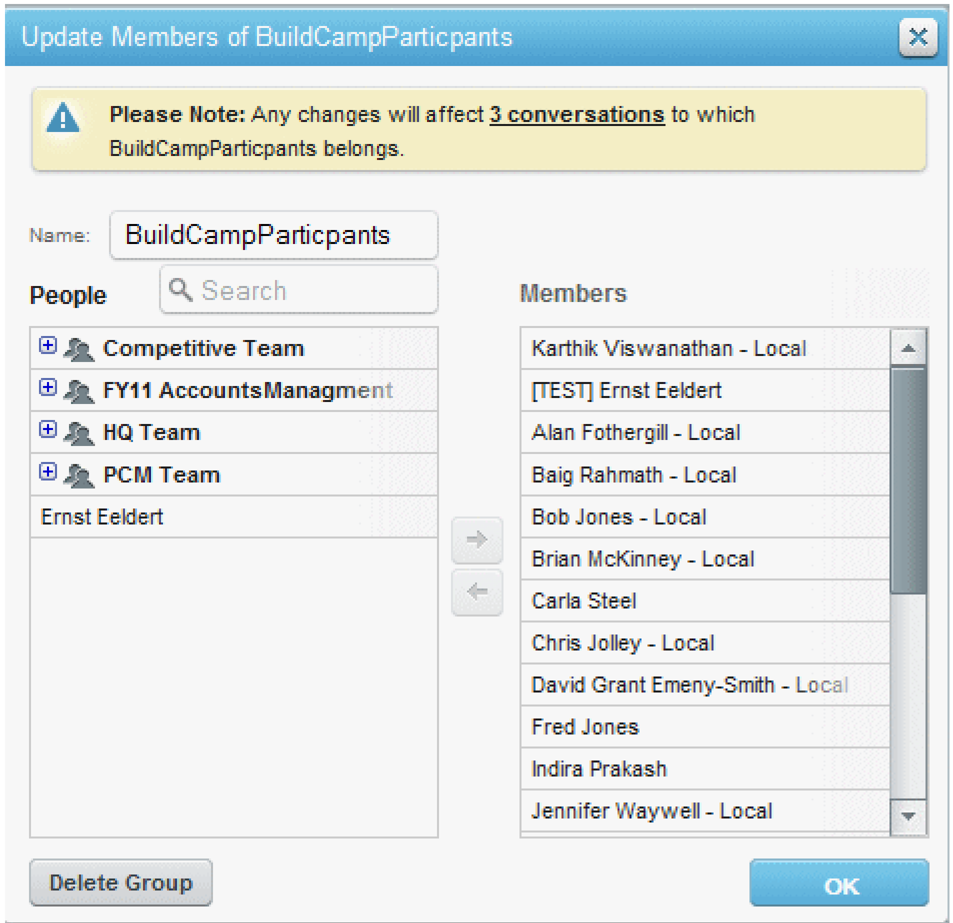
2. The Update Members of Group dialog appears. A note at the top of the dialog warns you that any changes you make to the group will affect the number of conversations the group belongs to. To see the names of the conversations the group belongs to, click the Number of Conversations link in the note. You may edit the group name and add or remove members from the group.
3. Click **OK** when you are done editing your group.

How Do I Delete a Group?

Delete a group when you need to remove all members of a group from all the conversations the group was originally added to.

To delete a group:

1. In the Groups Panel click on the **Edit Group** icon that appears when you hover over the group you want to edit.
2. The Update Members of Group dialog appears. A note at the top of the dialog warns you that any changes you make to the group will affect the number of conversations the group belongs to. To see the names of the conversations the group belongs to, click the Number of Conversations link in the note. To proceed to delete the group, click the Delete Group icon.



3. A message box asking you to confirm you want to delete the selected group appears.
4. Click **OK** to confirm you want to delete the group.

Lists

You can easily manage multiple people by creating Groups or Lists and adding them or removing them from conversations in a few clicks. The difference between Groups and Lists is that Groups are shared, public, and dynamic while Lists are private and static.

All members of a group will be able to see the group in their Groups panel. When you or others add or remove a user from a group, the selected user will gain or lose access to the conversations the group belongs to.

When you create a list, you are the only user who can see it in your My Lists panel. If you remove members from your list they will still have access to previous conversations you added the list to. If you add new members to your list, they will not have access to previous conversations you added the list to.

To learn more about working with lists please refer to the following topics:

- How Do I Create a List?
- How Do I Edit a List?

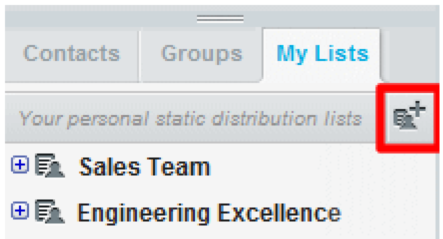
- How Do I Delete a List?

How Do I Create a List?

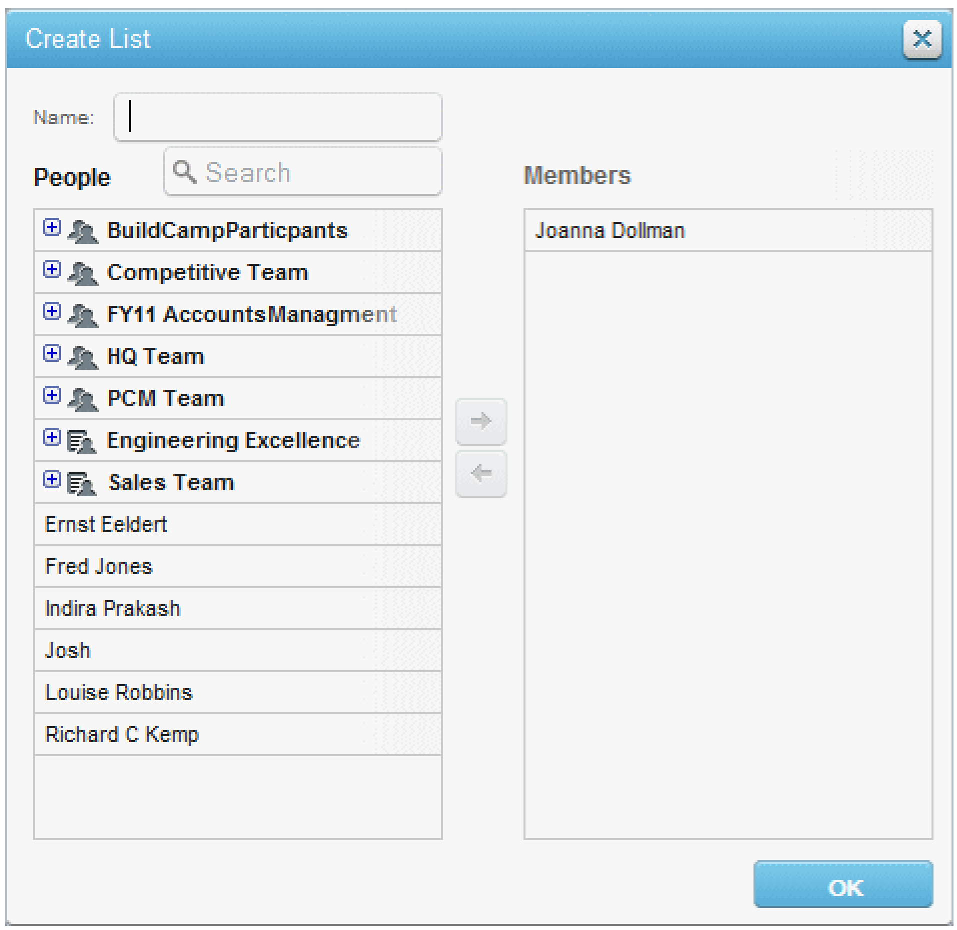
Create a new list to easily manage multiple users at the same time and create conversations among them or share documents with them in fewer clicks.

To create a new list:

1. In the **Lists Panel**, click the + button to add a new list.



2. The Create List dialog appears. Enter a name for your list.



3. Your contacts, groups, and lists will appear in the People selection box to the left. Select the people you would like to add to your new list.

4. To add people not shown in the People selection box, enter an e-mail address or name in the search box and select the user you would like to add from the autosuggest list that will automatically populate as you type.
5. Click the right arrow to move the selected people in the People selection box to the Members selection box where you will automatically be listed as a member.
6. Click **OK**.

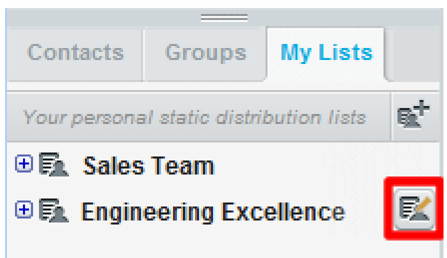
The new list you created will appear in your lists panel. Because lists are personal, only you will be able to see the list in your list panel and interact with it. Members of the list will not see the list in their list panel.

How Do I Edit a List?

Edit a list if you want to add or remove members or change its name. Removing members from the list will not remove them from conversations the list has previously been added to. Likewise, adding new members to a list does not automatically add them to conversations the list was added to in the past.

To edit a list:

1. In the **Lists Panel** click on the Edit List icon that appears when you hover over the list you want to edit.



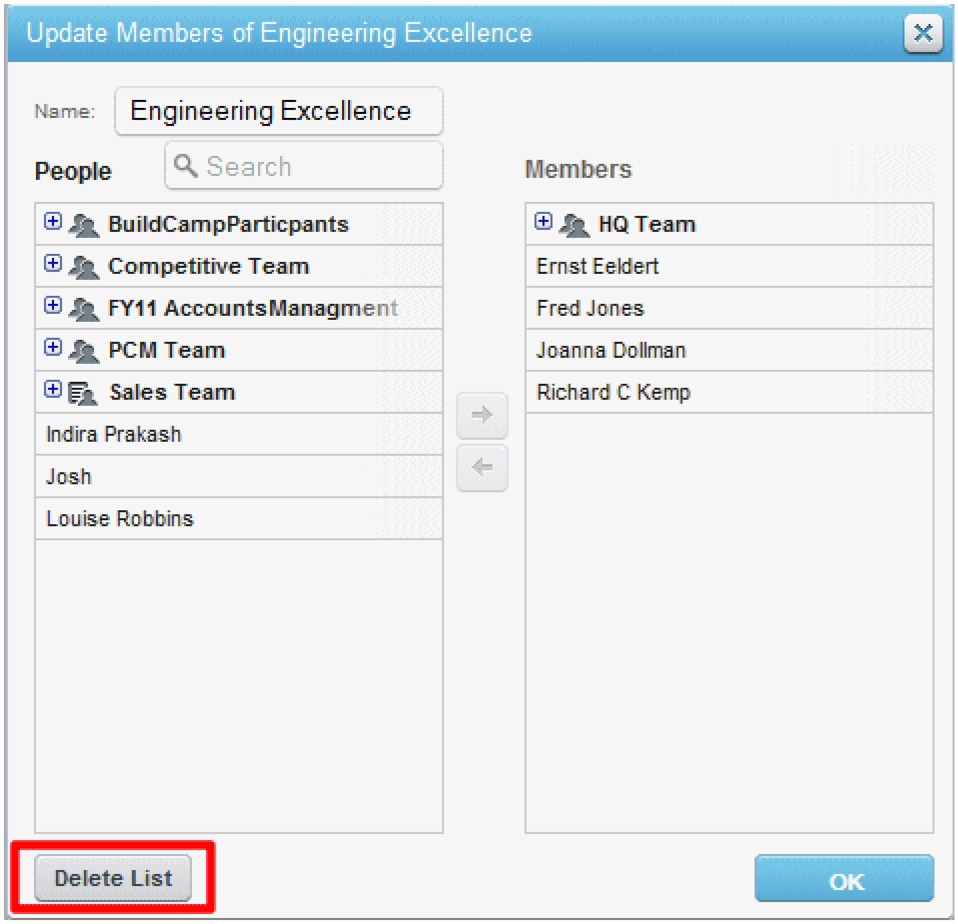
2. The Update Members of List dialog appears. You may edit the list name and add or remove members from the list.
3. Click **OK** when you are done editing your list.

How Do I Delete a List?

Delete a list when you no longer need to interact with that set of people on a regular basis. Deleting a list

To delete a list:

1. In the **Lists Panel** click on the Edit List icon that appears when you hover over the list you want to edit.
2. The Update Members of List dialog appears. Click the **Delete List** icon.



3. A message box asking you to confirm you want to delete the selected list appears.
4. Click **OK** to confirm you want to delete the list.

Modifying Your Settings

You can modify settings in On Track to change the information you display in your profile, the way you submit messages in conversations, and which notifications you want to receive in your e-mail. You may also change the default page you see when On Track starts.

To modify these settings refer to the following topics in this section:

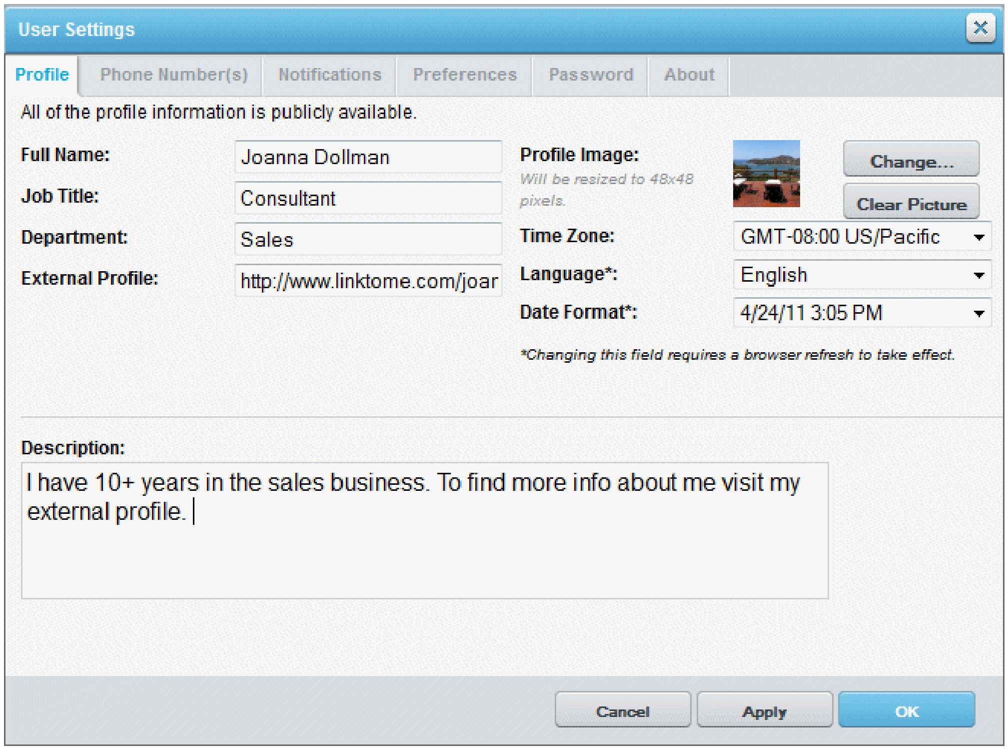
- How Do I Make Changes to My User Profile?
- How Do I Add or Edit My Phone Numbers?
- How Do I Set My Home Page?
- How Do I Change the Way I Submit Messages in a Conversation?
- How Do I Set My E-mail Notifications?

How Do I Make Changes to My User Profile?

Change your profile to modify and update your name, job title, profile image, external profile link, and language, date, and time zone preferences. All information in your user profile is publicly available for other users to see.

To make changes to your user profile:

1. In the On Track Header Bar, click **Settings** to open the User Settings dialog.



2. Select the **Profile** tab.
3. Enter your name, job title, department, a URL to your external profile, and a description about yourself.
4. Upload a picture to display as your profile image. This helps other users identify you.
5. Set your time zone, language and date format.
6. Click **OK** to save your changes and exit the dialog.

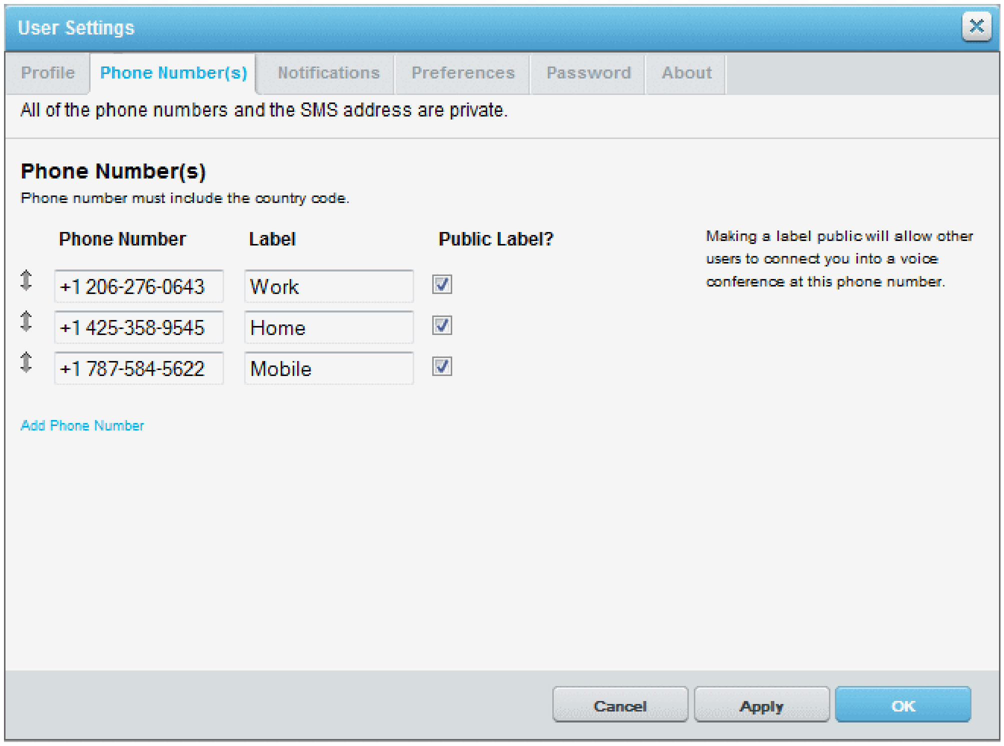
How Do I Add or Edit My Phone Numbers?

Add your phone numbers to quickly initiate voice conferences without having to enter your dialing information and to ensure users who call you using On Track can reach you at the right number. You need to make at least one phone number in file public to enable users to call you using On Track. Users will not have access to your phone numbers, they will only see the corresponding label describing the number they are calling: work, mobile, home.

To add or edit your phone numbers:

1. In the On Track Header Bar, click **Settings** to open the User Settings dialog.

2. Select the **Phone Numbers** tab.



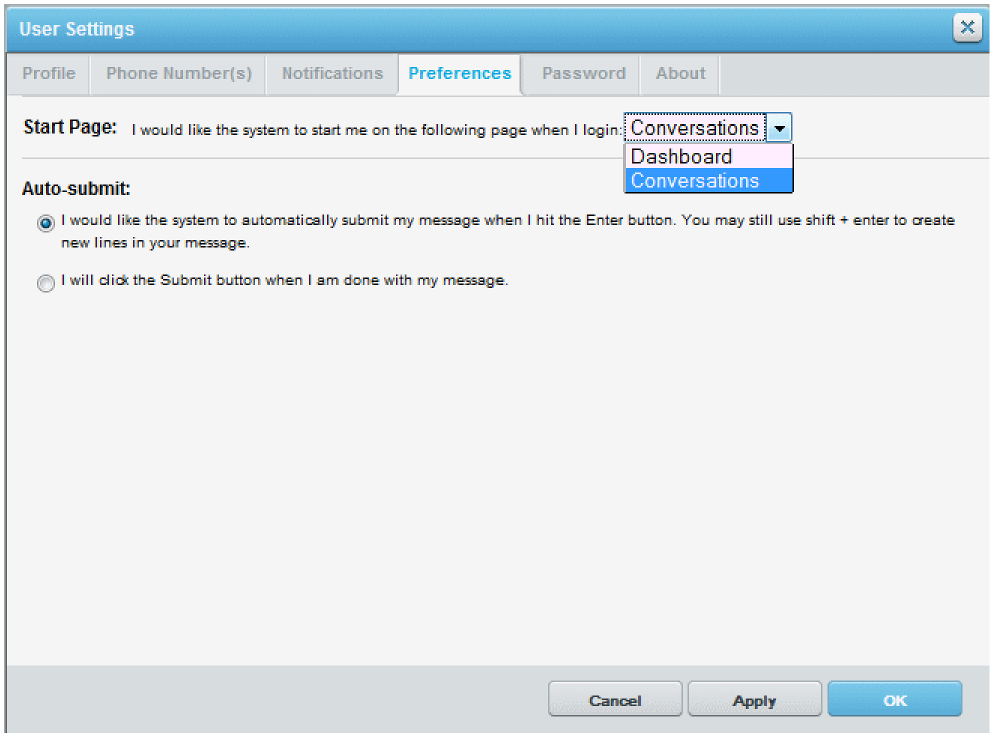
3. Enter the phone number.
4. Enter a label describing the phone number you just entered: work, mobile, home.
5. Check the public checkbox if you would like to make the phone number publicly available for users to be able to call you at that number using On Track. Users will not see the phone number, only its label.
6. To add another phone number click the **Add Phone Number** link and repeat steps 3-5.
7. When you are done adding or editing your phone numbers, click **OK** to save your changes and exit the dialog.

How Do I Set My Home Page?

Your Home Page is the view you get every time you open On Track. It defaults to a view of all the conversations you are a member of. You can change your Home Page to display your Dashboard instead. Chose your Dashboard, where you can organize your Tracks, if you prefer this view. To learn more about your Dashboard see section Your Dashboard.

To set your home page:

1. In the On Track Header Bar, click **Settings** to open the User Settings dialog.
2. In the Preferences tab, in the **Start Page** option, use the dropdown to select Conversations or Dashboard as your home page.



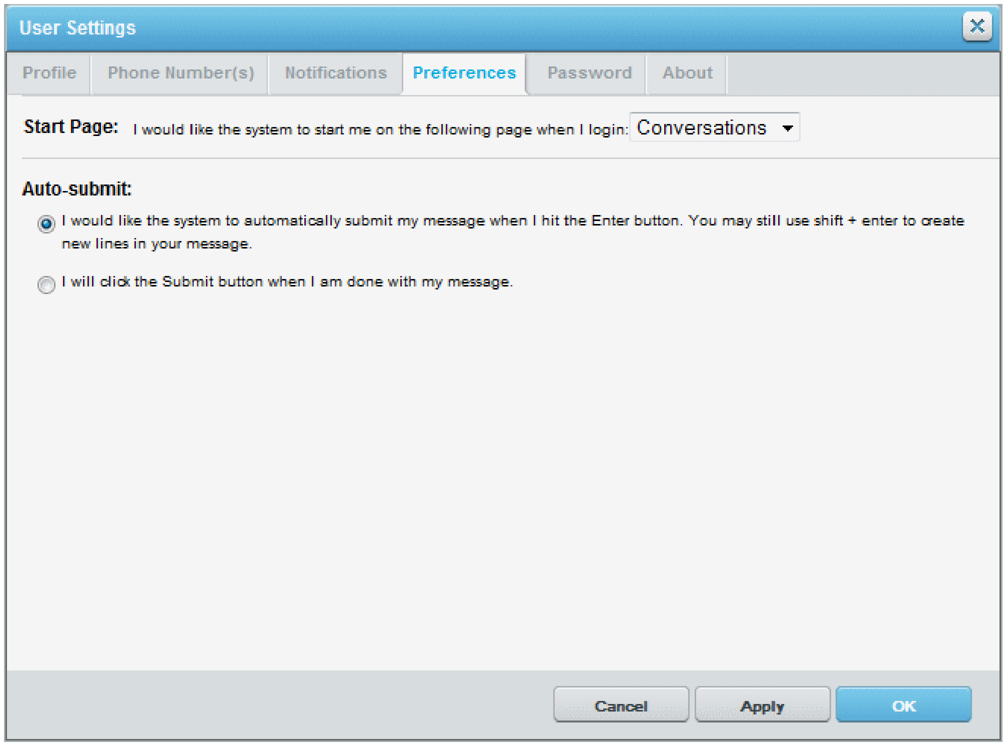
3. Click **Apply** to save the changes.
4. .Click **OK** to save and exit the dialog box.

How Do I Change the Way I Submit Messages in a Conversation?

Changing the auto-submit option lets you decide whether to manually send messages in a conversation by clicking the **Submit** button, or to automatically submit your messages in a conversation when you hit the Enter button.

To change the way you submit messages in a conversation:

1. In the On Track Header Bar, click **Settings** to open the User Settings dialog.
2. In the **Preferences** tab, In the **Auto-submit** section, select your desired option:
    a. I would like the system to automatically submit my message when I hit the Enter button. You may still use **Shift+Enter** to create new lines in your message.
    b. I will click the **Submit** button when I am done with my message.



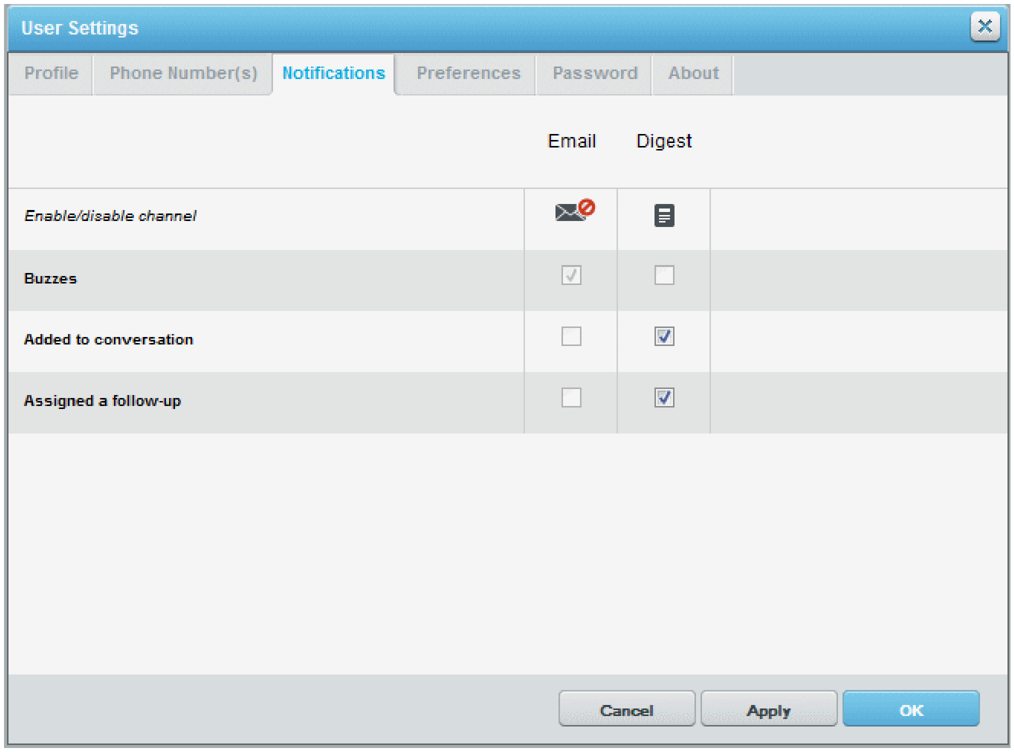
3. Click **Apply** to save the changes.
4. Click **OK** to save and exit the dialog box.

How Do I Set My E-mail Notifications?

E-mail notifications in On Track are a great way to be alerted about activity of interest to you while you are not logged on. You can receive individual e-mails when a user adds you to a conversation, assigns a follow-up to you, or buzzes you. You can also receive a daily digest of activity that took place in the conversations you are a member of.

To specify which types of notifications you would like to receive:

1. In the On Track Header Bar, click **Settings** to open the User Settings dialog.
2. In the **Notifications** tab, if you would like to disable the individual E-mail or daily Digest notification channels, uncheck the checkbox at the top of the desired column. You will no longer receive any notifications via the disabled channels.



3. If you would like to enable only certain individual e-mail notifications. Click on the checkbox at the top of the E-mail column to enable it.
4. Check the individual checkboxes next to the desired notifications you would like to receive. You can chose to receive or disable individual e-mail notifications for the following actions:
   - **Buzzes:** When a user buzzes you to get your attention on some matter.
   - **Added to a conversation:** When you are added to a conversation by another user.
   - **Assigned a follow up:** When you are assigned a follow-up by another user.
5. Click **Apply** to save the changes
6. Click **OK** to save and exit the dialog box.

Installing On Track Plug-Ins and Updates

Install available plug-ins and their updates to add or enable features and to stay up-to-date with the most current changes.

To learn more about installing available plug-ins and their updates refer to the following topics:

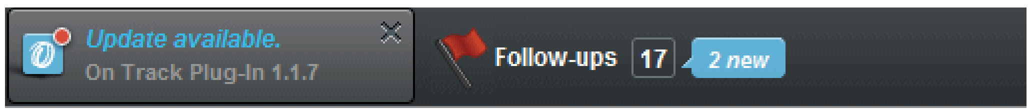
- How Do I Install Available Updates and Plug-Ins?
- What is the Oracle On Track Real-Time Plug In?
- What Is the Oracle On Track Add-In for Microsoft Office Outlook?

How Do I Install Available Updates and Plug-Ins?

To install available updates and plug-ins in On Track:

1. Sign in to Oracle On Track.
2. If a plug-in or an update is available, you will see an On Track icon with a red dot in the updates area of the information bar. Click on the icon with the red dot to see the available update.

3. Review the available update information, and click the **Update Available** block to initiate the installation wizard.



4. Follow the instructions in the installation wizard and complete the steps to install the selected plug-in or update.

What is the Oracle On Track Real-Time Plug In?

Install the Oracle On Track Real-Time Plug-In to enable application sharing functionality and the ability to take snapshots of your running applications to share them in a conversation.

If you have never installed the Oracle On Track real-Time Plug-in, you will see an update available icon in the updates area of the information bar in your On Track web client. See section How Do I Install Available Updates and Plug-Ins? to learn how to install this plug-in and its associated updates.

What Is the Oracle On Track Add-In for *Microsoft Office Outlook*?

Install the Oracle On Track Add-In for Microsoft Office Outlook (On Track Add-in for Outlook) to add On Track features to your Outlook e-mail client.

You will be able to use the On Track Panel and the On Track Tool Bar (Outlook 2007) or the On Track tab on the ribbon (Outlook 2010) to work with On Track directly from your Outlook.

The Growl component is also installed to receive online notifications of activity happening in your conversations. To learn more about working with the On Track Add-in for Outlook see, Oracle On Track Add-In for Microsoft Office Outlook Help.

If you have never installed the Oracle On Track Add-in for Outlook, you will see an update available icon in the updates area of the information bar in your On Track web client. See section How Do I Install Available Updates and Plug-Ins? to learn how to install this add-in and its associated updates.

After installing the add-in, start Outlook and enter your On Track account and password to log in the first time. The rest of the connection information is already filled in for you. Connection information and log in credentials will be saved for future access.

Glossary

buzz

A buzz is an immediate online notification to gain the attention of a member to a certain conversation.

contact

An On Track user that has been added to your contact list.

conversation

A conversation is a discussion on a particular topic. Conversations may contain messages, comments, files, file versions, document annotations, voice conferences, application sharing sessions, polls, and other gadgets. Conversations have a set of members who may contribute to the content. Conversations can be public or private. Public conversations are available for anyone in your organization to find and join. Private conversations are only visible to users you explicitly add as members.

digest

A digest is a compilation of all the follow-ups, new conversations, and new messages created in the last day that have not been read by the user. A user may configure their e-mail notifications to receive the daily e-mail digest.

follow-up

A follow-up is a way for you or others to flag an item for further review.

group

A group is a set of users that can be added to a conversation as a single entity. Groups are dynamic, public, and shared. When a group is added to a conversation, all of the members of the group, as well as the group name, will be shown in the Membership bar of the conversation. If members are added or removed from the group, all conversations the group belongs to are updated accordingly to reflect the change.

list

Lists are static and private. When you add a list to a conversation, all members of the list will be shown as individuals. There will be no indication that these members were added using the list. If members are added or removed from the list, it will not impact any conversations the list was added to.

message

A message is part of the conversation that is sent by a participant.

item

Any element in the On Track Add-In for Outlook that is used for collaboration or communication: tracks, conversations, posts, bookmarks, follow-ups, tags, contacts, groups, or lists.

public conversation

A public conversation can be accessed by all the members of the team.

track

A track is a container for a set of related conversations on similar topics. A track is visible to all members of the conversations contained in that track.

tag

A tag is created by a user for conversations, documents, voice conferences and application sharing to enable easy access and search of content. All tags are public and, therefore, viewable and usable by all users of the system.

user

Any person using On Track even if it has not been added to your Contacts list.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at
`http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc`.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

Oracle On Track Communication Web Client Help, Release 1 (1.0.5)
E20655-04