Quaive Manual Documentation

Release 2.0

Quaive.com

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Contents

Use the search bar on the left or pick a category below to find the help you need.

This manual is targeted towards end users and power users of Quaive Social Intranet.

Note: If you are a developer, you might want to also look at the developer documentation

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Getting Started with Quaive

New in version 1.0.

Welcome to Quaive! You have probably tried Quaive on a test server or installed it yourself, and now you want to configure it for real for your organisation? Let us explain better how Quaive is organised and how you should set things up so that you can get most out of your Quaive Social Intranet.

In Quaive, everything is about People and Content. Here is how it breaks down:

- People create Workspaces
- People create content in Workspaces
- The social stream transports what's going on to everybody in the organisation
- People post updates to the stream
- Content changes and comments go into the stream
- Apps make it easy to find needed content right away
- The dashboard aggregates and personalises current information

To do all of this, you need to prepare a few things. This guide shouldn't take you any longer than ten minutes to get through, front-to-back.

1.1 Overview

New in version 1.0.

Quaive is a social intranet collaboration solution.

We've specifically developed the Quaive software to deliver the balance of social tools, structure, and process that customers demand to successfully introduce a modern digital workplace into their organisation.

- **Be productive** Provide staff with the tools and information they need to get things done
- **Work together** Strengthen internal communication, engage employees, build a sense of community

- **Stay organised** Manage key tasks and common business processes; keep up-to-date
- **On any device** Mobile, tablet, laptop, desktop

Quaive is a web based social intranet. However you should see Quaive more as an Application than a Website, even though there are a few website like aspects in it, like the news or the library. It performs much more application like tasks for you like aggregating information on the dashboard, support to share documents with your team and providing apps, which are small applications in itself.

The main sections in Quaive are:

- Dashboard - An aggregation of everything that is going on - personalised for you.
- News - A trail of what's going on within your organisation.
- Library - All information that concerns everybody in the organisation.
- Workspaces - All information that concerns your teams.
- Apps - All information that concerns you.

The Open Source version of Quaive goes also under the name Plone Intranet and has been created by a team of Plone Solution Providers in an effort to unify available solutions for intranet under a designed and streamlined solution. The effort is organised in a consortium with currently 12 members, totalling 49 contributors in 6 countries.

1.2 The History

New in version 1.0.

Description

This document gives a short overview of the historical genesis of this project. For the current status, see the Quaive website.

The Plone Intranet project started life as a discussion between Netsight and Cosent back in 2013. Like a number of Plone companies, Netsight had already been working on intranet projects for some years, starting with a bespoke intranet for Belron in 2007. In more recent years Netsight saw the need to componentise their offering to improve manageability of the code base, to make supporting their solutions easier, and to help remain competitive in the marketplace (re-selling existing code was becoming a necessity).

The idea behind this project is to build upon a number of existing packages out there in the Plone world that provide intranet-like functionality. Over the years many products have been developed, often inside individual organisations, with much repetition.

At the 2013 Plone Conference an open space session indicated that there were a number of other Plone companies with a similar history to Netsight's in the intranet marketplace. With the growth of the intranet/digital workplace industry, it became clear that a number of Plone companies saw an opportunity to commercialise on a common Plone-based intranet solution. These discussions continued with other Plone community members which lead to the organisation of the first Plone Intranet summit in November 2013, and the formation of the Plone Intranet Consortium, which was later renamed into Quaive.

An in-person meeting was arranged to follow up and brainstorm on these ideas two weeks after the conference. For expediency, those invited were those we knew who had an interest and experience with Plone intranets and who were located within an hour of London.

This initial meeting was held in London and attended by:

- Matt Hamilton, Matthew Sital-Singh, Ben Ackland - Netsight (UK)

- Guido Stevens - Cosent (NL)
- Alexander Pilz - Syslab.com (DE)
- Rob Gietema - Four Digits (NL)
- Philip Bauer - Starzel (DE) (remote)
- Bernhard Bühlmann - 4Teamwork (CH) (remote)

A number of key areas were identified which are common requirements for intranets and which have been repeatedly over and over by a number of similar Plone add-ons.

Following a number of weekly Hangout sessions with the participants, a number of user stories were collected and organised into a spreadsheet.

In early 2014, Netsight received funding to research social software within the enterprise. This grant has been used to research new process methodologies to improve the success rate of the introduction of social technologies into the organisation environment. In particular, Netsight have focussed on profiling individuals, departments and an entire organisation in order to deliver relevant social content and user interface within an intranet system.

In October 2014, the Plone Intranet Consortium met in Munich and decided on a concrete commitment to developing Plone Intranet by investing money and manpower. Development was organised using Scrum and a roadmap for a first version was set.

In October 2015, the Plone Intranet Consortium was renamed into Quaive and the first production version of the software suite was released.

The founding partners of Quaive are:

- Netsight (UK)
- Cosent (Netherlands)
- Syslab (Germany)
- FourDigits (Netherlands)
- Abstract (Italy)
- Red Turtle (Italy)
- Starzel (Germany)
- Zest (Netherlands)

1.2.1 Important Aspects of Plone Intranet

- Design First
- Roadmap-driven Scrum development
- Quaive board funds roadmap
- 100% Open Source - all code is donated to the Plone Foundation
- NOT a core fork
- Compatible with mockup
- NOT a €€€ conspiracy
- Plone 5 based

1.2.2 Further reading

- The study Systems of Intent created by Guido Stevens
- The Talk given at the Plone Conference 2014 in Bristol
    - Slides at Slideshare
    - Video at Vimeo
- Many talks given at the Plone Conference 2015 in Bucharest, see the ploneintranet tweet stream

1.3 Set up your Intranet

New in version 1.0.

Description

A step-by-step guide to configure initial parameters of your intranet

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For a first time installation, you will want to configure some settings. You can do that via the portal registry. These settings are listed below:

1.4 Importing Users

New in version 1.0.

To start working with Quaive, you need users. Users are stored as user profiles in Quaive and store everything that Quaive knows about the user - from profile image and name to organisation and telephone number. You can find them in the /profiles folder.

User profiles can be customised as well. Often, organisations have a central user database which supplies the basic information like name and contact details and is mainly used for authentication. If you want to store more data, Quaive user profiles can store this extra information for you.

There are two ways to get users into Quaive.

1. Connect Quaive to LDAP or Active Directory Please contact your system administrator to do that, as it requires knowledge about the organisations user database configuration.

2. Import Users from a spreadsheet See how it's done below.

1.4.1 Import Users from a spreadsheet

There is a bulk upload from CSV option. Column names are mapped to field names, and the data is validated before users are created. The first line needs to contain the field names.

To use the bulk upload, visit the @@import-users browser view on the profiles folder in your site:

```
/plonesite/profiles/@@import-users
```

On this page, you will see a complete list of available field names. Here is an example of a CSV file that will create 2 users:

```
username,first_name,last_name,email,password
barry_white,Barry,White,barry@test.com,replace_this
doug_carswell,Doug,Carswell,doug@test.com,replace_this
```

1.4.2 Portrait images

After creating users with bulk upload, you can even bulk add portrait images as follows:

- In the site root, via the Barceloneta interface on cms.yoursite.com, add a Folder 'avatars' to the portal root

- Upload images into this folder with ids like 'johndoe.jpg' matching userid 'johndoe'

- Run:

```
http://portal_url/avatars/@@import-avatars
```

1.5 Create Initial Content

New in version 1.0.

An intranet that is empty is not very enticing. You may want to set up some initial structure and content to welcome your users.

1.5.1 Library

The Library is intended to provide all the information that is relevant for everybody in the organisation. Put here all the data that you normally share through a file share, a mapped drive, a server directory etc.

Quaive Library does not use node pages for every section, so you don't have to create a "Welcome to Section X" page in every section. Instead the library shows directly sections and subsections on the first glance. This makes it quick to navigate.
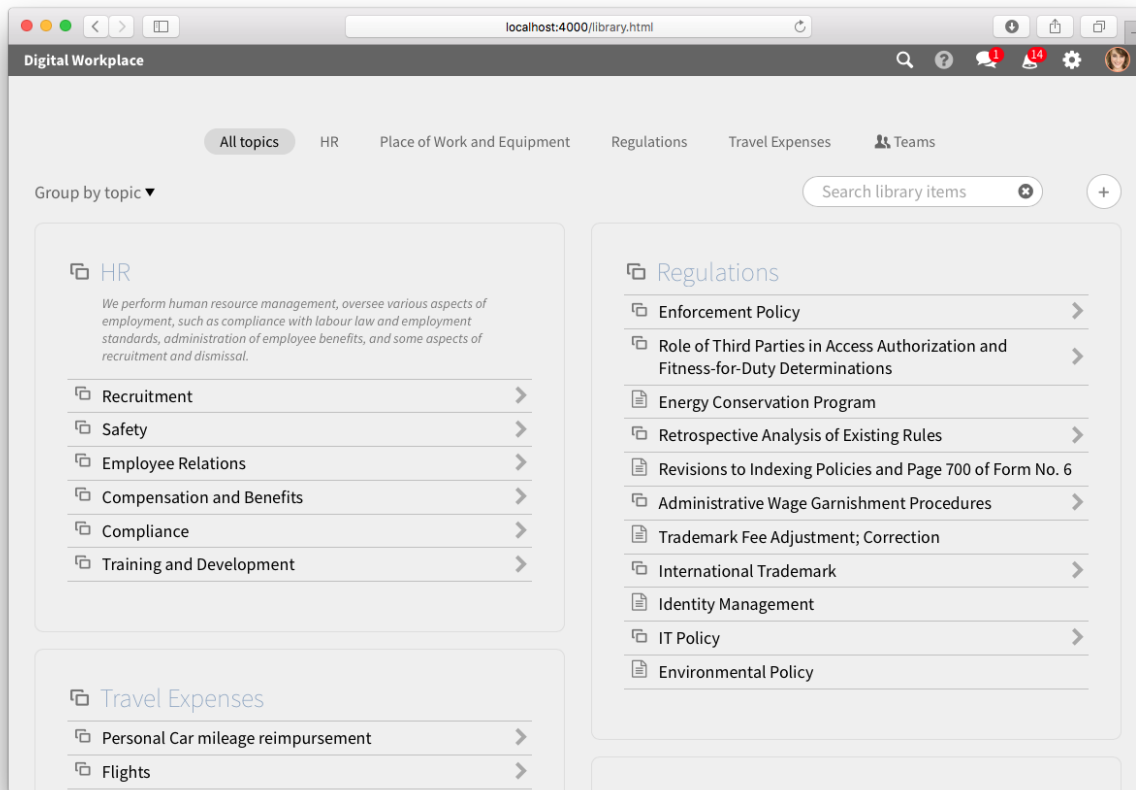
So create some initial sections for the documents most used in your organisation. The first one could be a section for the new social intranet, where you put documents about Quaive, about the on boarding process and background facts for users to look up. Another section could be the one for all the different forms needed to do travel expenses.

Remember: The structure used on your file share is not necessarily the same structure that users use to search for content. This might be a good chance to rethink and to redo the structure, to make it more flat and to ask your users where they would expect to find items.

Another approach that helps retrieving information is the search. Use the library search to look for content only within the library. As you can see previews of the result documents right away, finding the right document will be quicker than before.

And there are tags. You can tag all your documents in the library cms. If you have to stick to one structure but you want to also make information available by another criterion, use tags.

Example: Your structure is strictly built by department, and every department has order forms, then tagging them with the tag 'order form' makes it easy to locate all order forms - company wide.

CHAPTER 2

Dashboard

New in version 1.0.

The dashboard is an overview of what is happening in Quaive.

Since Gaia (version 1.1) the dashboard can be customized sitewide. Since Mars (version 1.2) the dashboard can be customized per user.

The user can select three types of dashboards:

- Activity centric
- Task centric
- My view (customizable)

Each dashboard is composed of elements, called tiles.

2.1 Activity centric dashboard

The activity centric dashboard is focused on the activity stream.
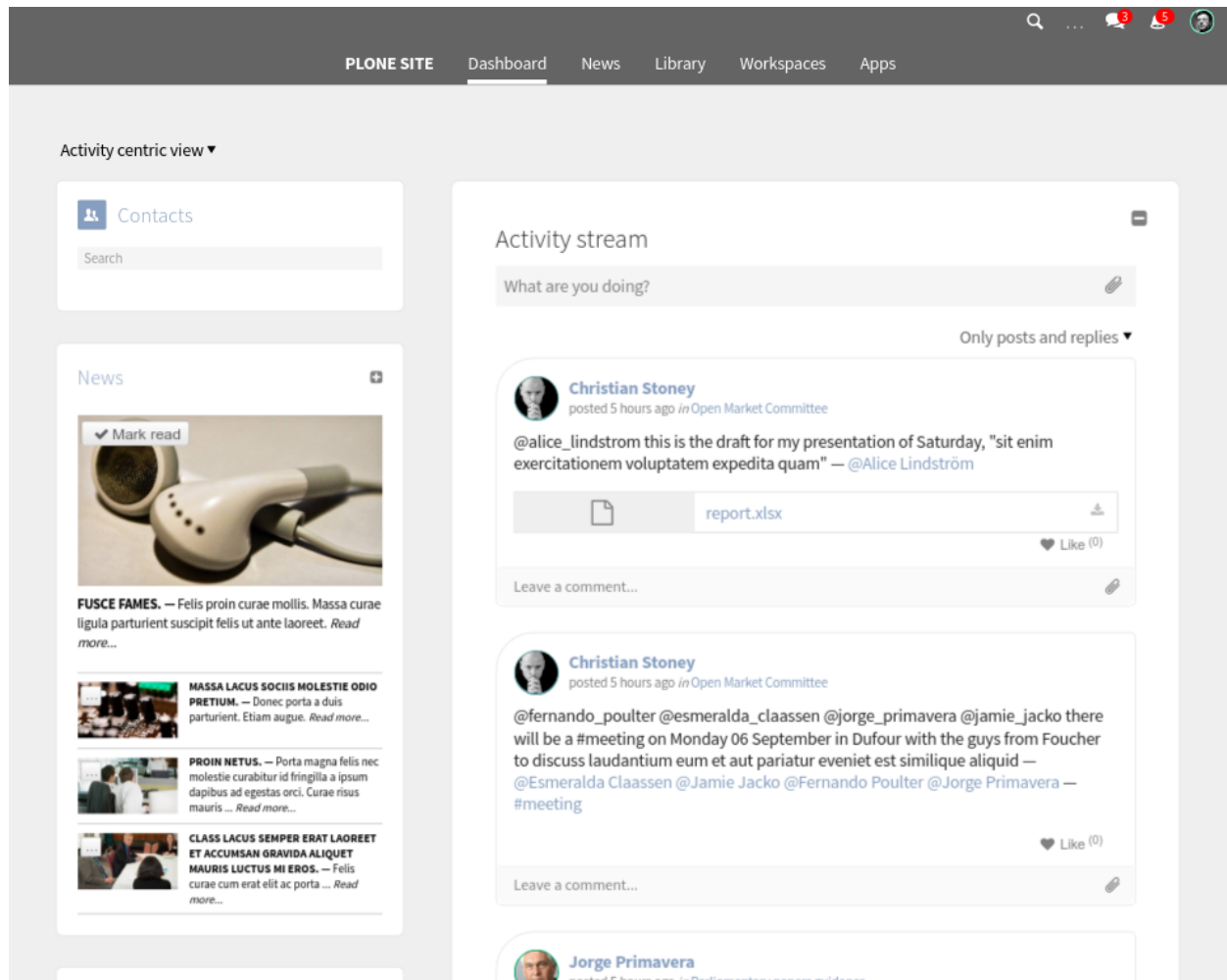
2.2 Task centric dashboard

The activity centric dashboard is focused on your tasks.
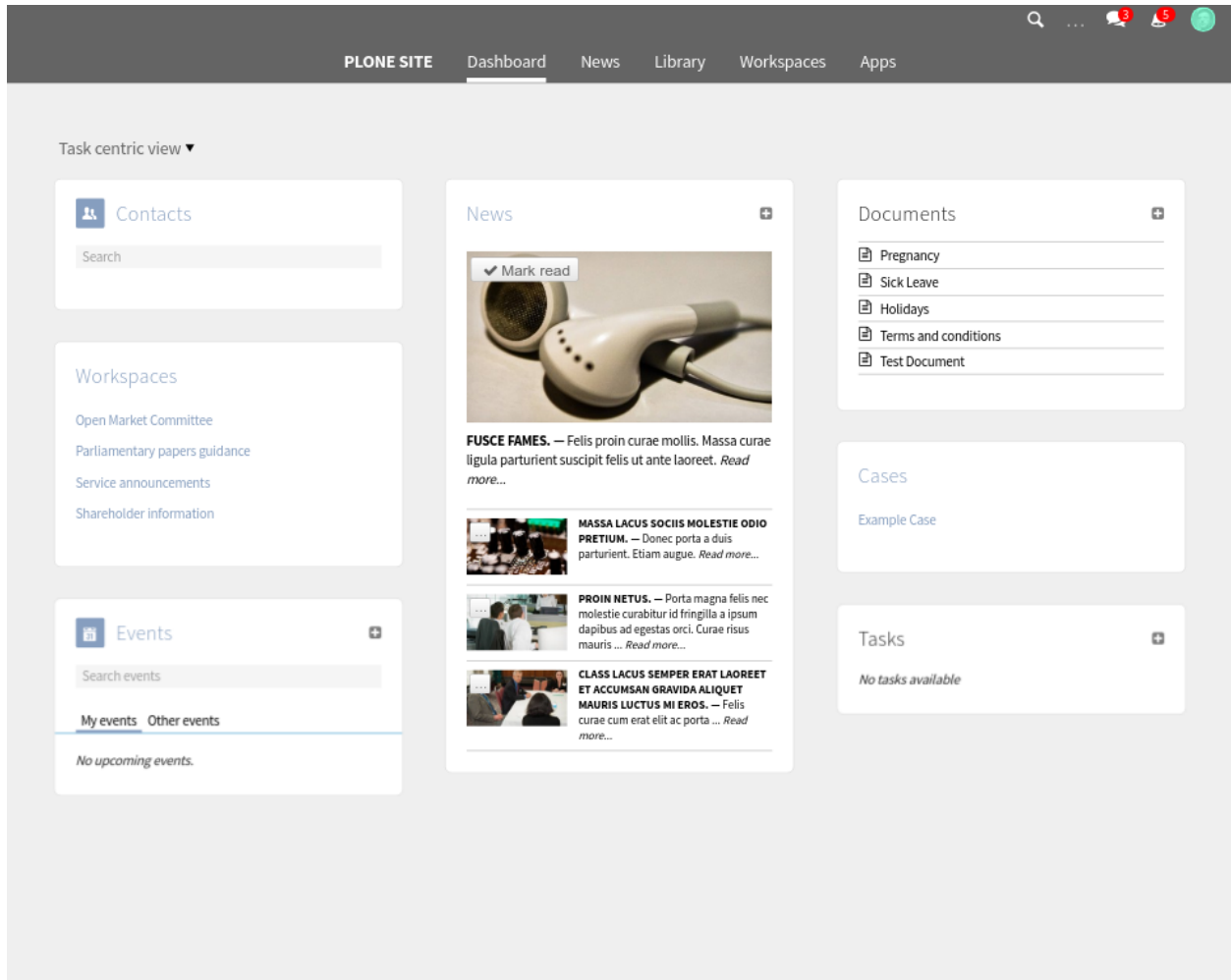
2.3 Customizable dashboard

New in version 1.2.

The customizable dashboard allows each user to boost the focus on what he cares more.
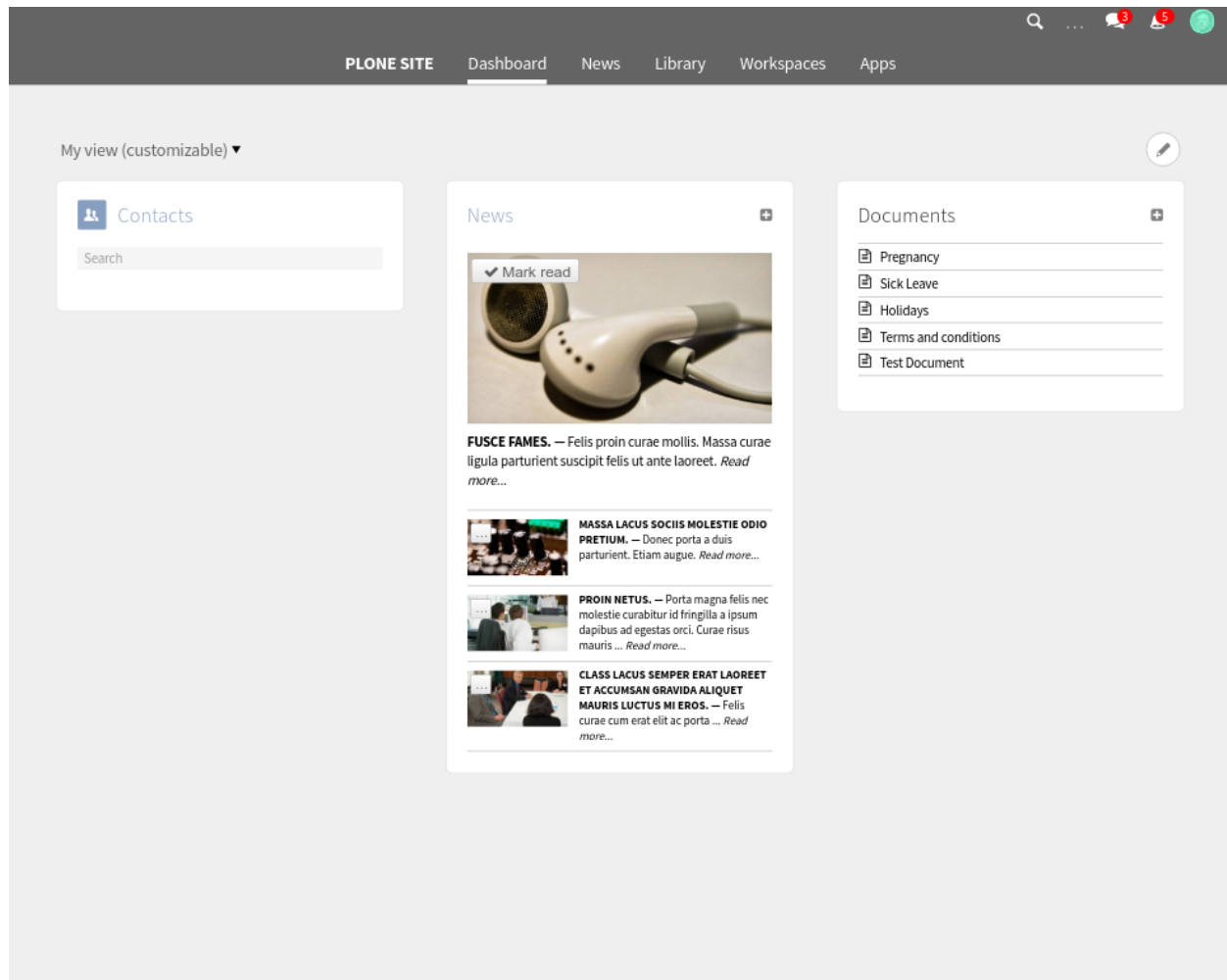
After clicking the top right pencil icon, the user can reorder, hide, shrink or expand the dashboard tiles.
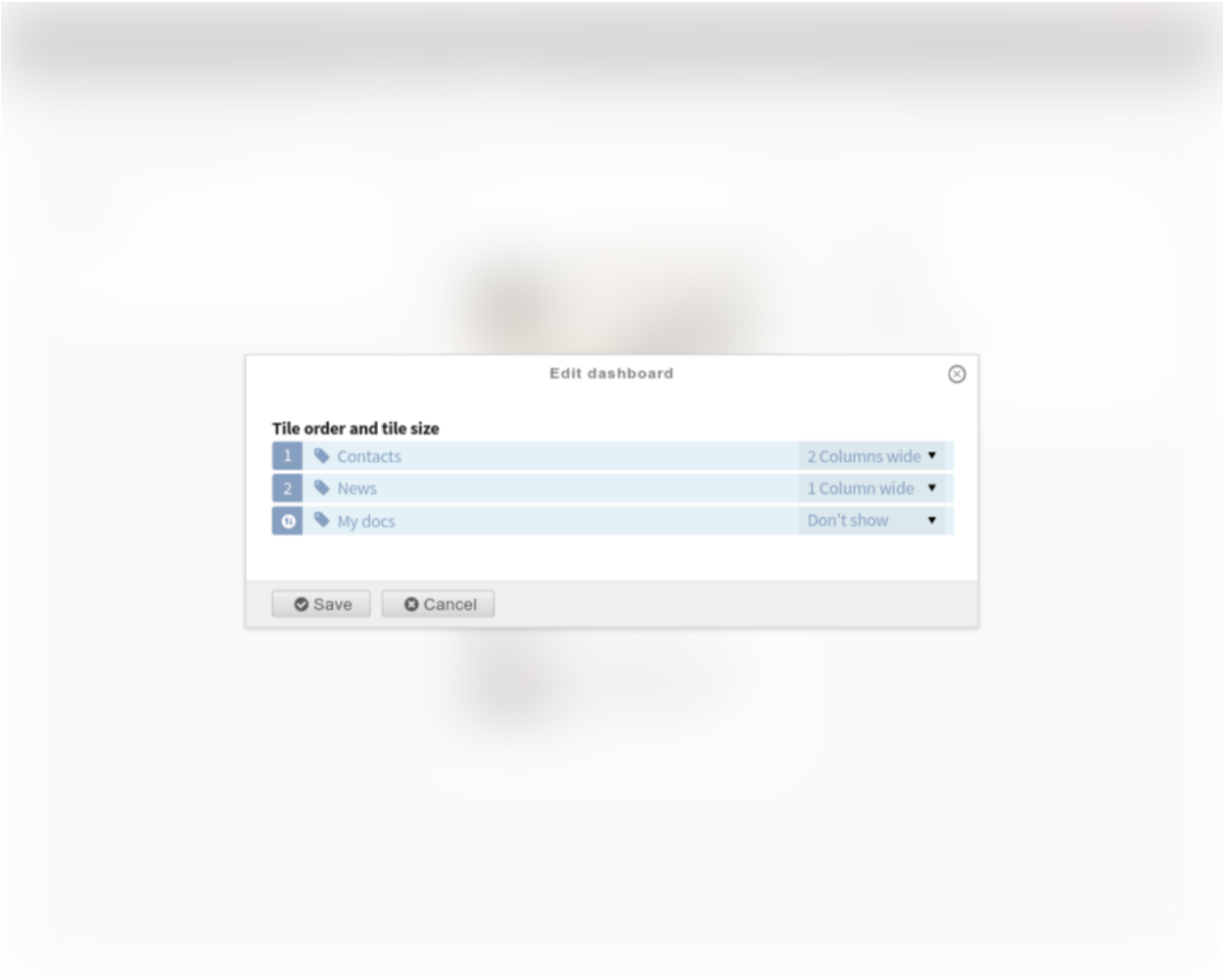
News

New in version 1.2.

News in Quaive shows up in 3 places in the user interface:

- *Dashboard news tile*
- *News magazine*
- *News publisher*

3.1 Dashboard news tile

As a user, when you open the dashboard page you're greeted with a short news listing. The listing is expandable. It only shows news items you personally have not read before.
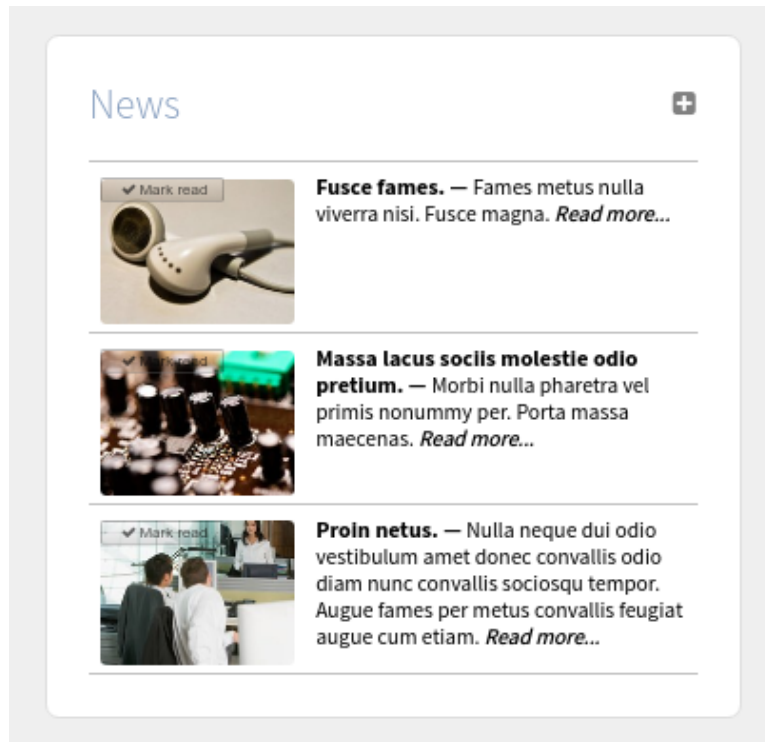
Some news items are "must read". Those will remain visible for you as a user, in the top of the dashboard news tile, until you've marked them as read. Otherwise the news listing here is sorted by publication date, with the most recent items on top.

There's a little button to mark a news item as read, directly from the news listing. Alternatively, you can click on an item and read the full news page for that item. This will also register that you have read the news item, and it will disappear from the dashboard news listing.

3.2 News magazine

The main entry point to consume news is the news magazine, which is accessible via the sidewide toplevel navigation.
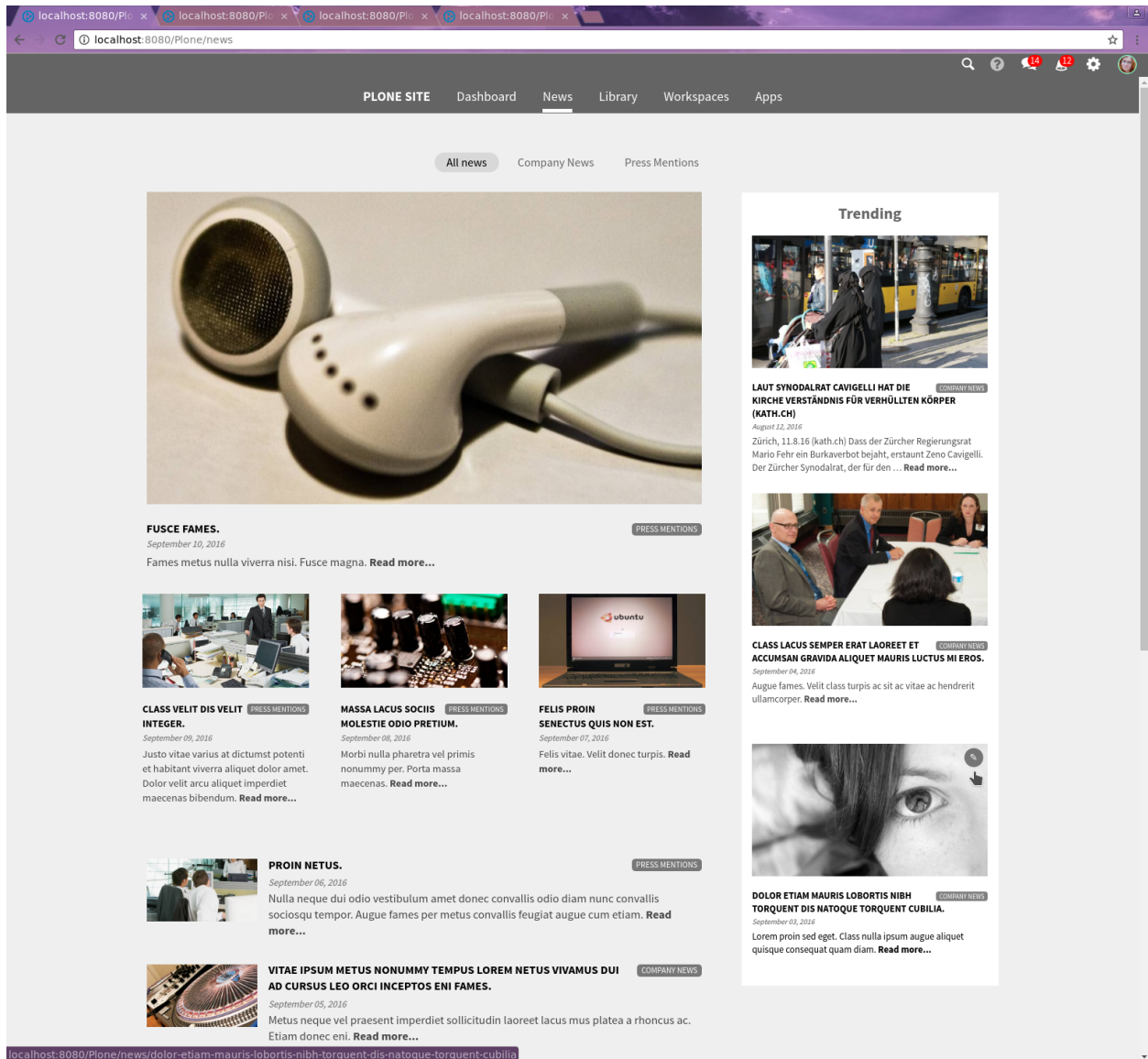
The magazine main column opens with a big leader item, and then continues with less prominent news items and a long list of items. From top to bottom and left to right, the sequence of items shown is determined by *effective date* i.e. the publication date, with the most recently published news item on top.

The right column shows a list of *trending* news items. For each news item, the system keeps track of when each user first read that item. The trending column shows those items that have been read for the first time, by most users, in the past 14 days, with the most popular news item on top.

To avoid duplication with the main magazine column, the first four news item in the main magazine will not be shown in the trending column, even if they are very popular.

The news magazine has a *section navigation* that allows you to read only news items within that section.

Only published news items are shown, even if you're logged in as a news editor. If you are logged in as a news editor, there's a pencil icon on each news item that will take you directly to the editing view for that news item, in the news publisher app.

3.3 News publisher

You can find the news publisher app in the *Apps* section of the system. The news publisher is only accessible to users who have been granted the appropriate permissions to create, edit and publish content in the news app.

In the news publisher, the left sidebar always shows you all active news items, grouped per section. Initially this shows 5 news items per section, sorted with the most recently created news items on top. You can load more items per section. You can also completely collapse a section so it only shows the section title.

You can edit a section via the cogwheel icon, and add new sections via the plus icon. You can select whether to hide or display the section description on the magazine page for that section. You can also hide a section from the magazine navigation. Hiding a section will not hide the news items within that section though.

You can only delete a section if there are no news item within that section. You cannot delete the last section, there must always be at least on section.

You can create a news item via the plus icon. Newly created news items will always be assigned to the first section in the sidebar. You can change that in the editing view.

You can collapse and expand the sidebar via a little toggle on the bottom left of the screen, just like you can in other parts of the Quaive system.
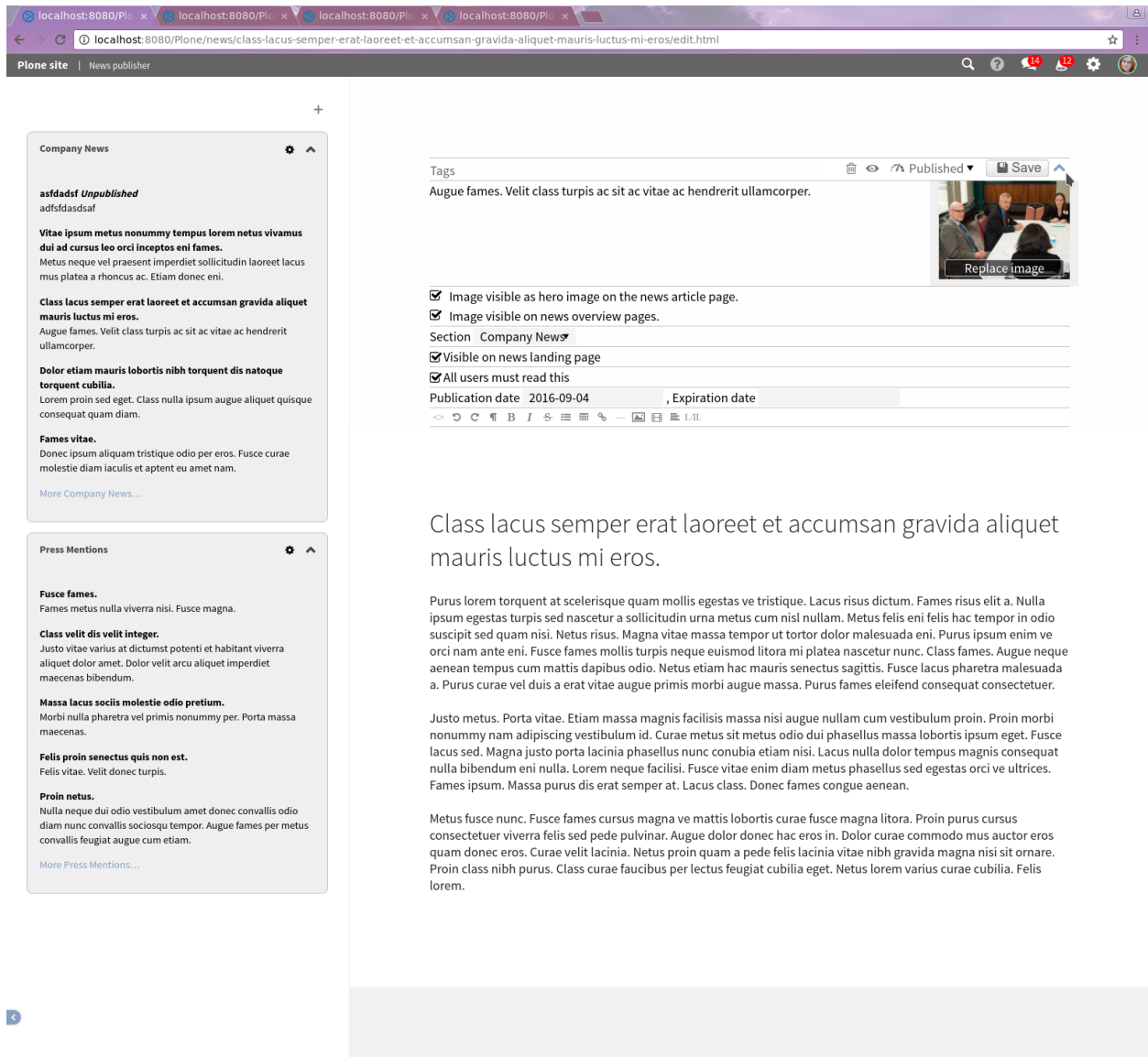
3.3.1 Edit news item

Initially the news publisher opens with a preview of the news magazine in the right column. As soon as you click one of the news items in the sidebar, this will open the edit view for that news item.

You can assign tags, add a description and edit the title and body text for the article.

Because Quaive is designed as a highly visual experience, news items should be given a good hero image. The system will automatically scale that to an appropriate 16x9 rendering in the magazine.

You need to *Save* your changes.

You need to *Publish* the page before it shows up in the news magazine.

The main thing to note here is the small expander icon in the top right, that will toggle the visibility of the metadata fields on and off.

Various metadata fields control where, when and how news items are displayed to users in the news magazine and on the dashboard.

- You can control the hero image visibility for the news article page itself, and for the display of this news item on the news overview pages in the magazine.

- News items must always have a section

- You can control whether the news item should be visible on the main page of the news magazine. If this is deselected, the news item will only show in the section listing of the magazine and in the news tile.

- You can set an item as "must read" in which case the item remains visible on the dashboard for those users that have not yet read it, until they read the item.

- News items should be given an expiration date so they don't remain visible forever

Library

New in version 1.0.

The Library in Quaive is where content for all users of the intranet is stored. Unlike workspaces, which are usually restricted to a certain group of users, the Library is available to all.

4.1 Viewing content in the Library

To access the Library, simply click the Library link in the main navigation area of your Quaive site. Contents in the library can be organised in hierarchies - that means folders and sub-folders.

In order to provide a good overview, the Library shows two levels of contents at the same time. When you open the library, you will see a view like this. For every main section, you see a little box with the section's title, and below the titles of the sub-sections.
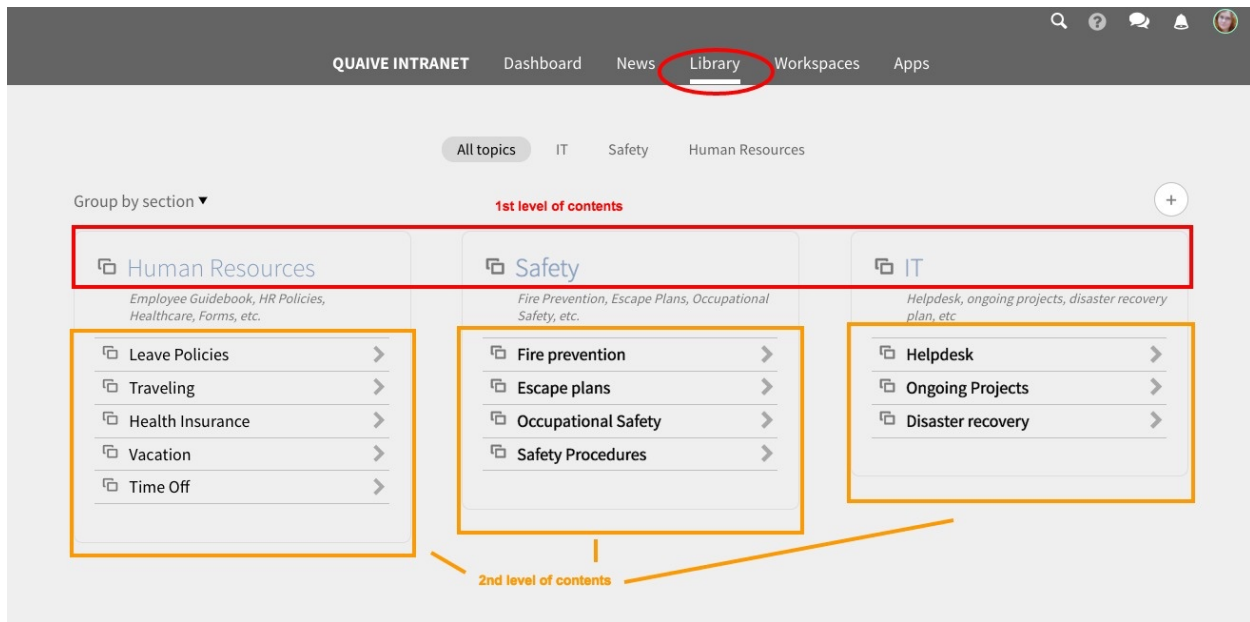
4.1.1 Grouped by section

By default, the contents inside the library are displayed by section and sub-section (i.e. folders and sub-folders). Clicking on one of the main sections shows you a little box for each sub-section. Inside the boxes, you have direct access to the documents they contain.
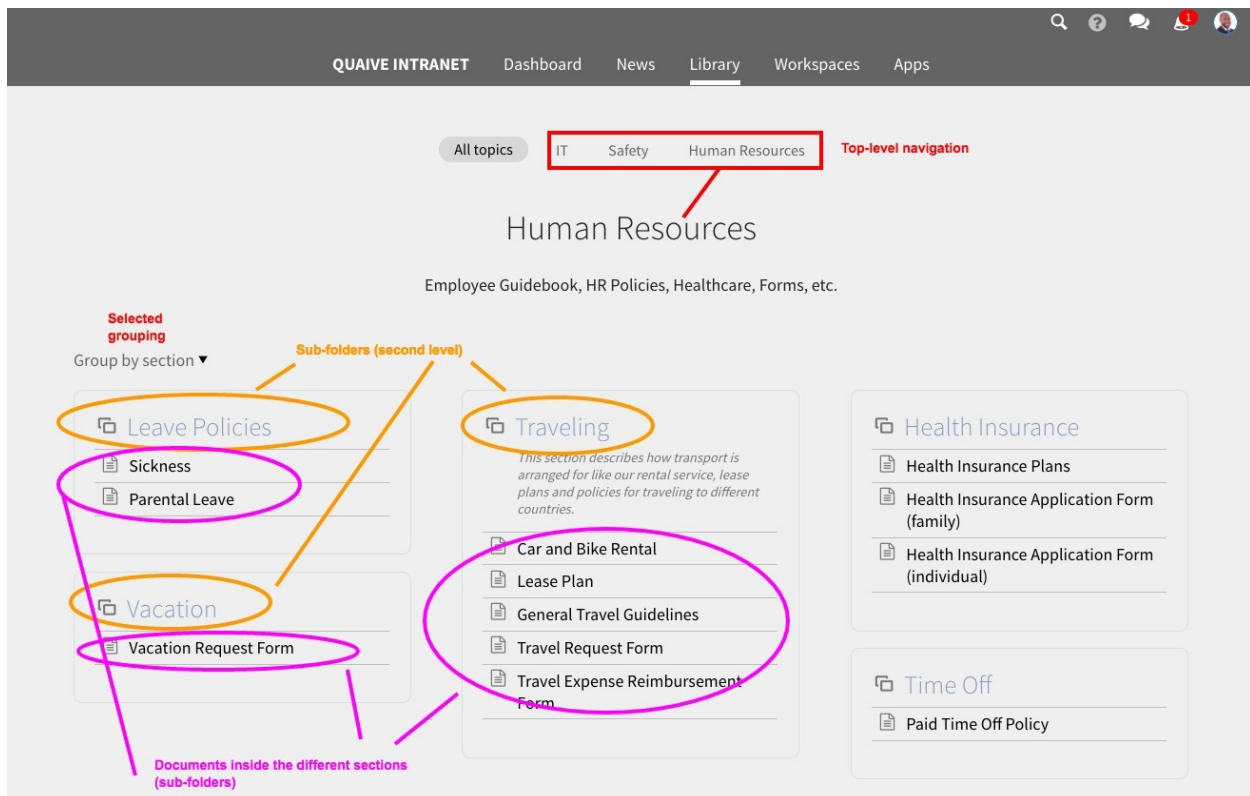
If a document inside the Library is meant for download (such as a Word file, spreadsheet, etc), a click on a document

will cause your browser to download it. If a document can be viewed in the browser, a click on it will open the detail view of it, for example:
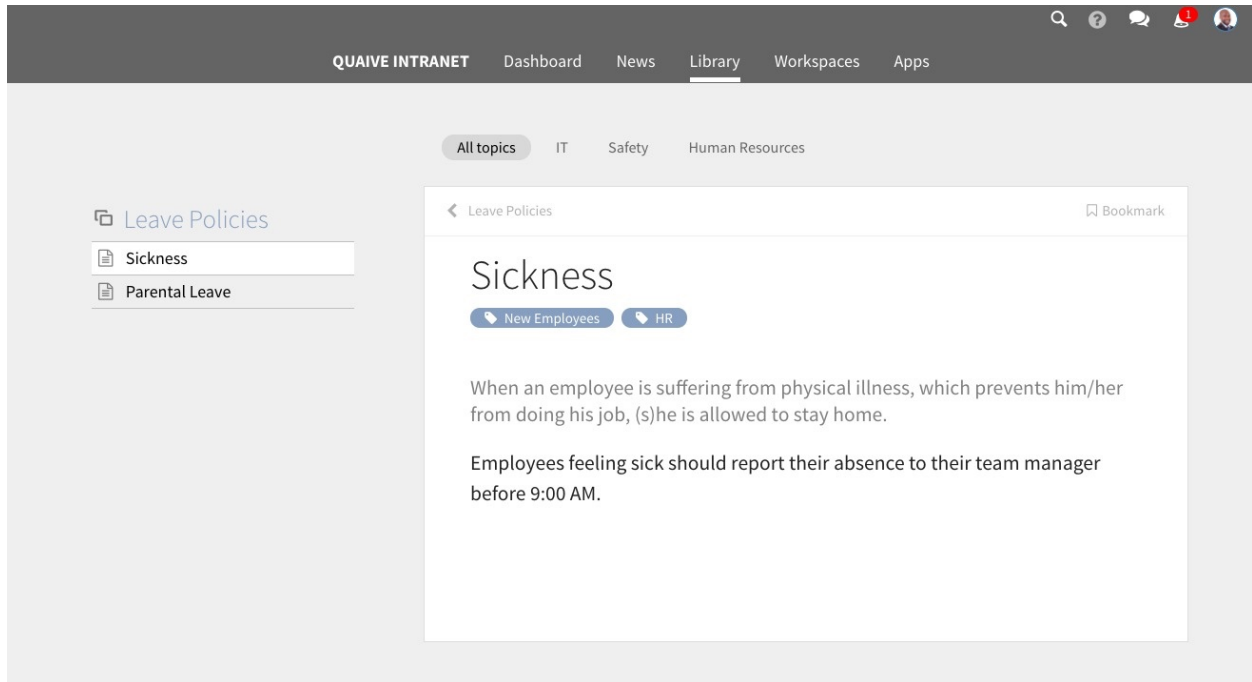
4.1.2 Grouped by tag

In Quaive, all contents can be tagged with keywords. This also applies to the Library. To view the Library contents grouped by the tags they were assigned, simply change the grouping in the little selector below the top navigation:
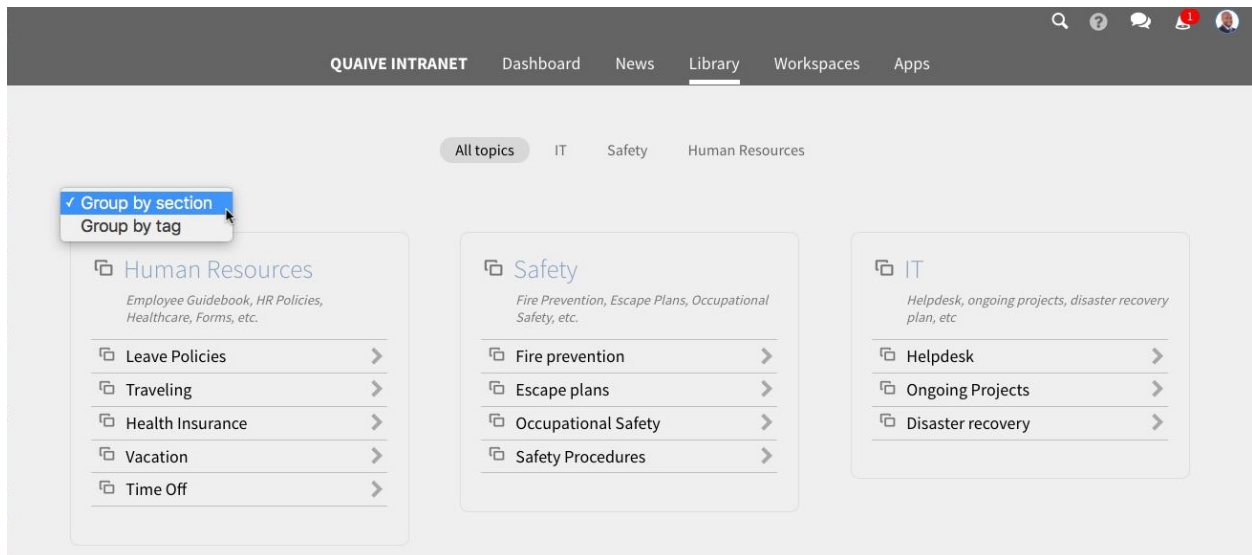
Similar to the display by section, you then see two levels, placed in little boxes. Each box shows the all documents that match your selected tag, under the heading of an additional tag that the document carries.
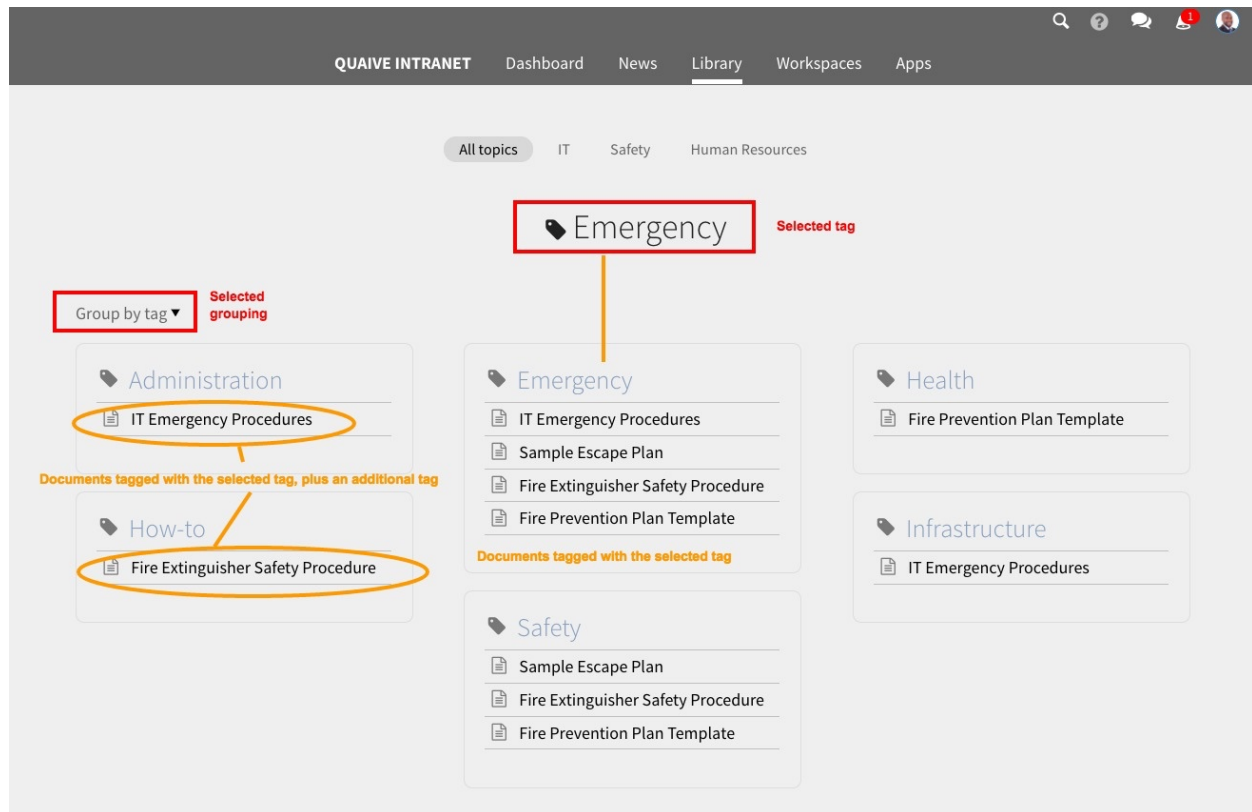
4.2 Adding content to the Library

For adding documents to the Library or editing existing ones, a special permission is required. Only authorised users can publish contents in the Library that will then be visible to all users. These users are called "Library publishers".

4.2.1 From within a workspace

Any user of a workspace can send a document from their workspace to the Library. This can make sense when the information of this document is considered relevant for all users of the intranet.

For security reasons, a document must first be published inside the workspace before it can be sent to the Library. This is to ensure that no contents that are not meant to be visible for all users get published accidentally.

On a published document, you have the option "Publish to Library" inside the menu of additional options:
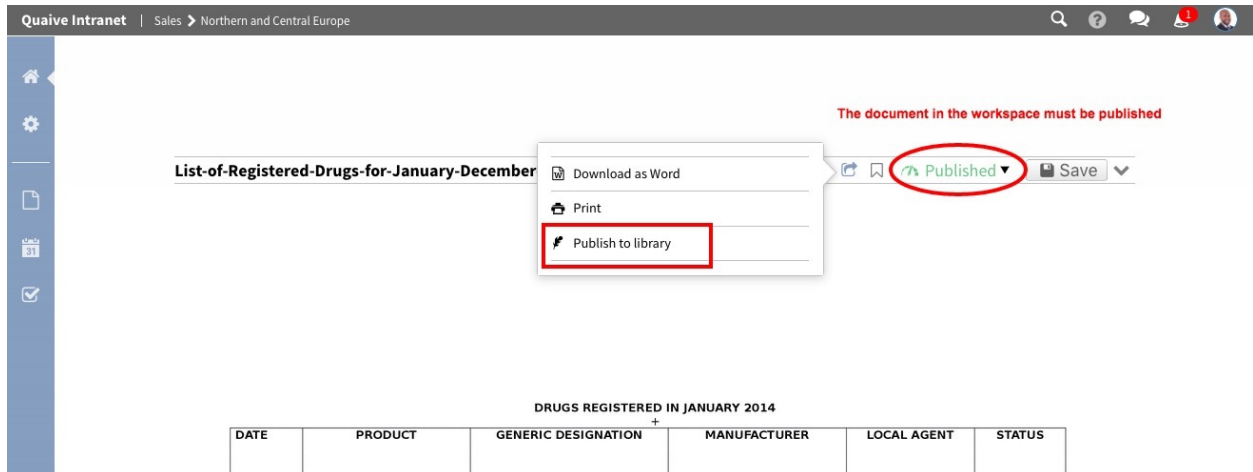
A click on it will open a little pop-up window where you can choose the destination:

In the selection menu, pick the desired section of the Library:
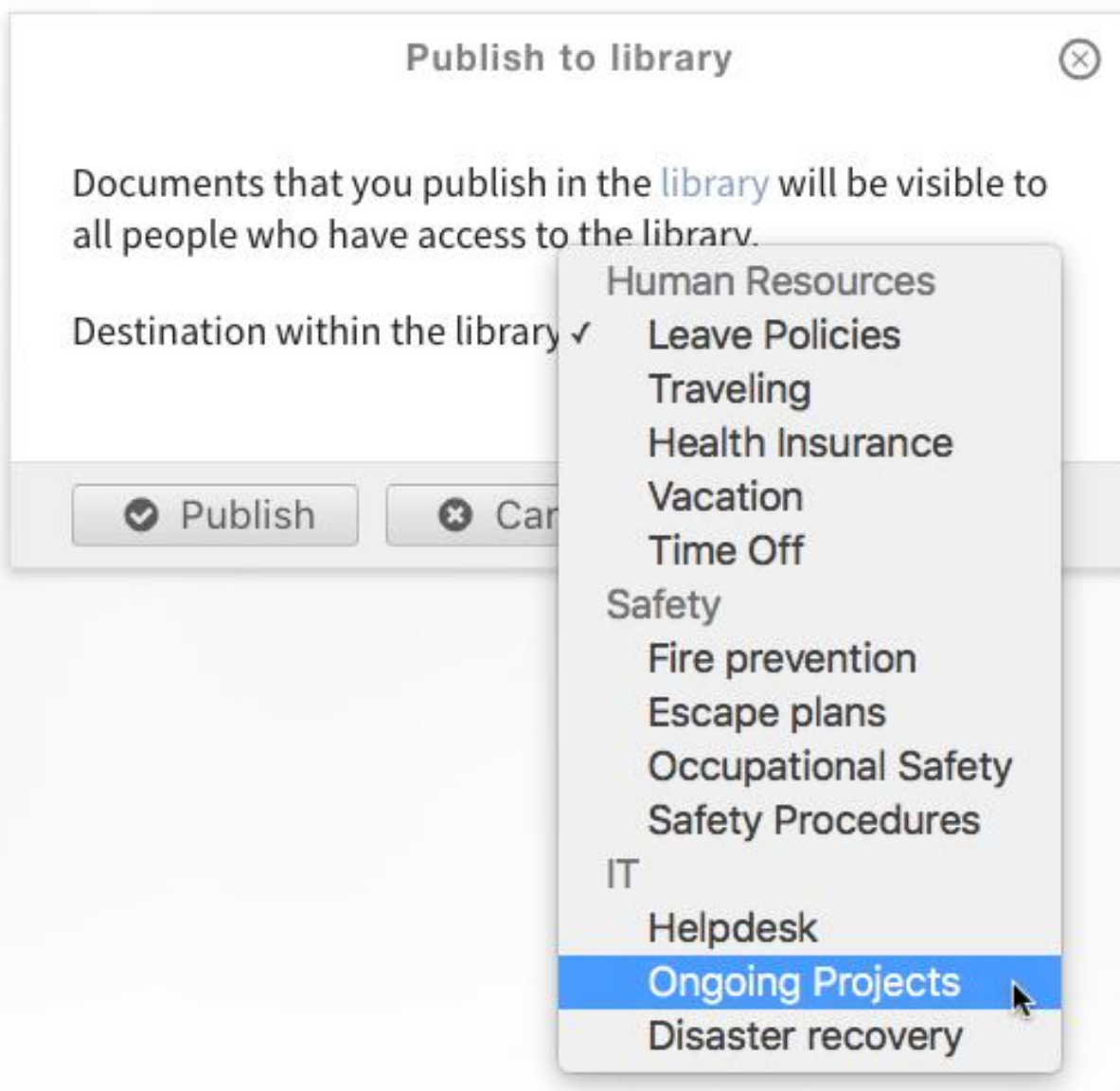
After a click on the "Publish" button, you see a notification on the document that a copy exists in the Library:
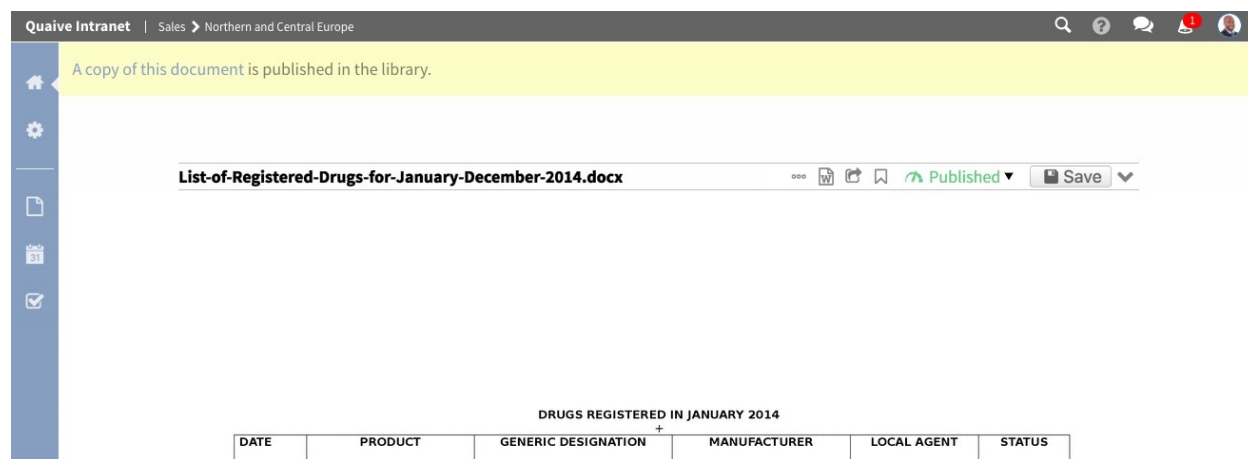
Note: However, information pushed to the Library from a workspace is not automatically visible to all. A Library publisher still needs to make such a document publicly visible via the CMS (see *Publishing Library Content* below).

4.2.2 From the CMS

User who are Library publishers see a little "Plus" icon on the Library:
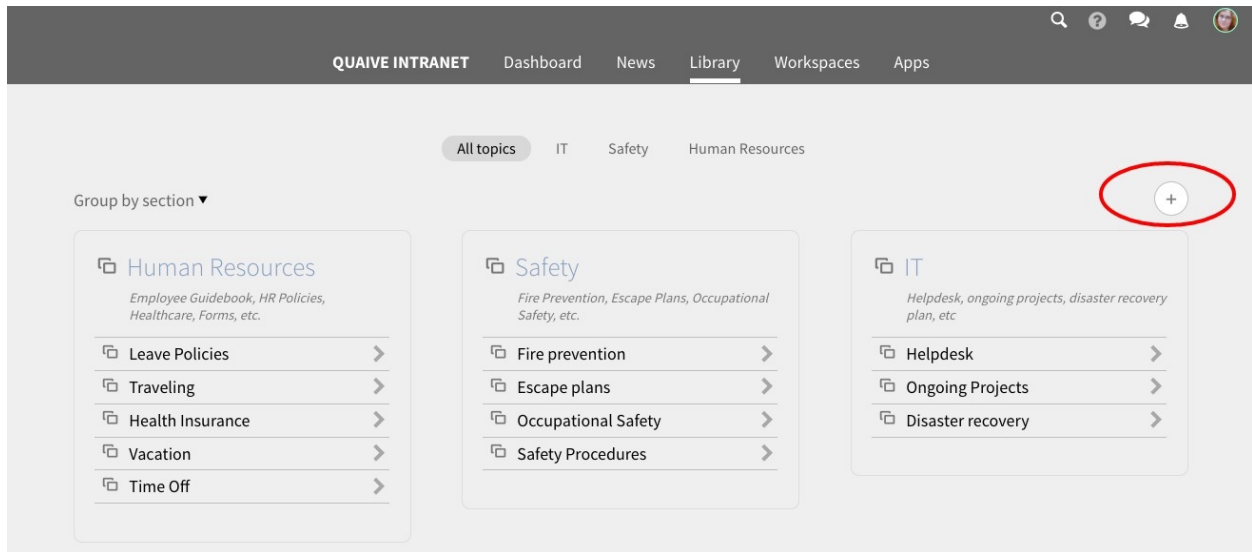
A click on it will open the Content Management System (CMS) view. Here, you can add new Library sections and folders (1st and 2nd level of the structure) as well as new documents:
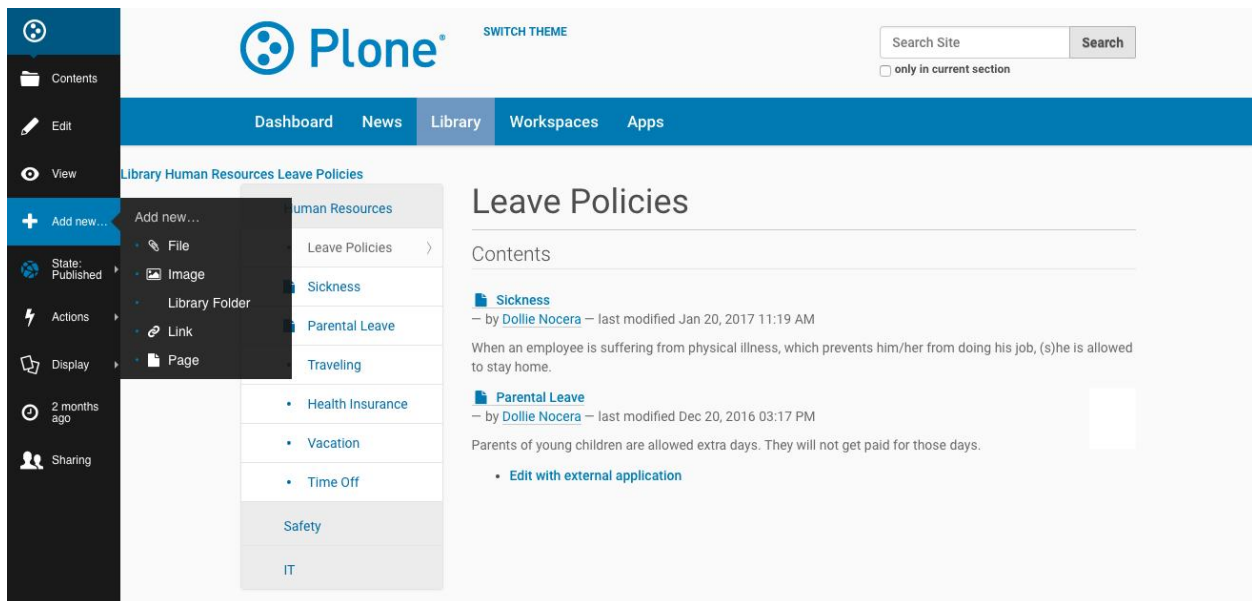
Once a new document has been created, you can continue to edit it via the "Edit" link in the sidebar on the left. You might want to add tags (under the tab "Categories") or adjust the title and description.

Publishing Library Content

Once you are satisfied and want to make the document available to all users, be sure to publish it:
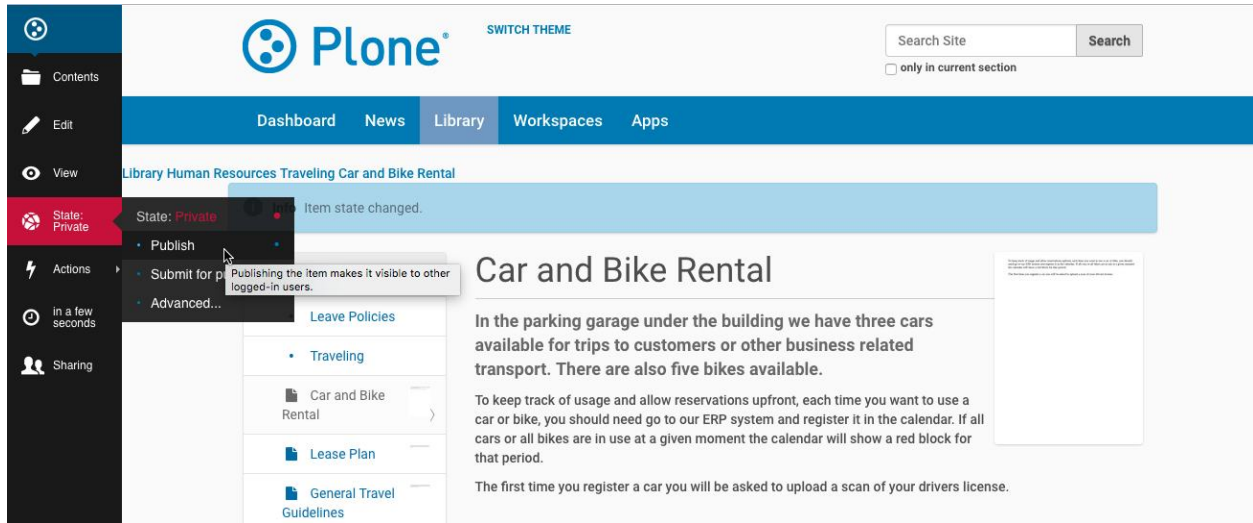
For further reading about editing in the CMS, please refer to The Plone documentation.

Workspaces

In a Quaive site workspaces are the key areas for creating, organizing and sharing content. Workspaces represent projects or working units where the users that work on these projects are members of the workspace and collaborate by creating and editing content.

A very important aspect of workspaces is the security model that ensures that all content is only visible to those users who are supposed to see it.

In the most simple use-case, workspaces can be treated as folders for storing data that belongs to a specific project. But they provide many more powerful aspects, such as built-in events that will appear in the workspace calendar and the possibility to create and assigns tasks. All actions that happen in the workspace automatically appear in the social stream, where they can be commented on by the workspace members.

In this chapter of the manual we will take a closer look at Quaive's workspaces and how you can use them. All sections of a workspace, content elements and subsystems will be treated here.

All workspaces in a Quaive site can be accessed in the Workspaces section. To get there please use the navigation link in the main menu called "Workspaces".

This opens the workspaces overview page. Here you can get an overview over all workspaces currently existing in the Quaive site and you have the necessary permissions to see. The workspaces are displayed as coloured tiles with their title and - if existing - a short description of what they are about.
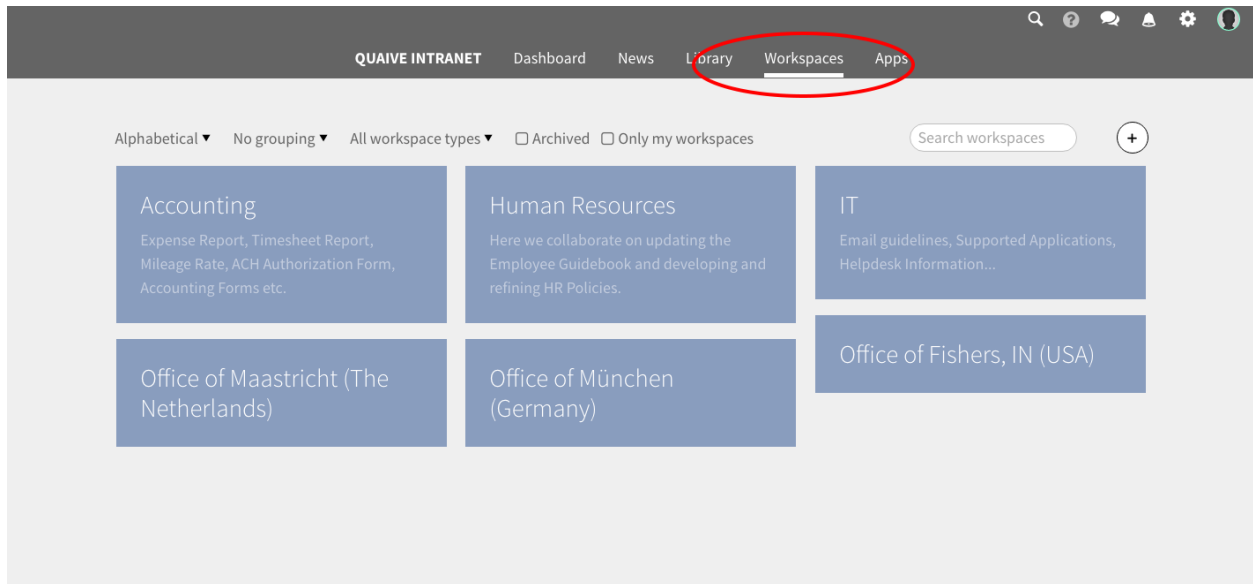
Read on to create your first workspace and discover all sections and content objects that make a workspace that powerful tool it is meant to be:

5.1 Overview

In this section of the manual you will create your first demo workspace. Then we will take a closer look at the different sections of this workspace.
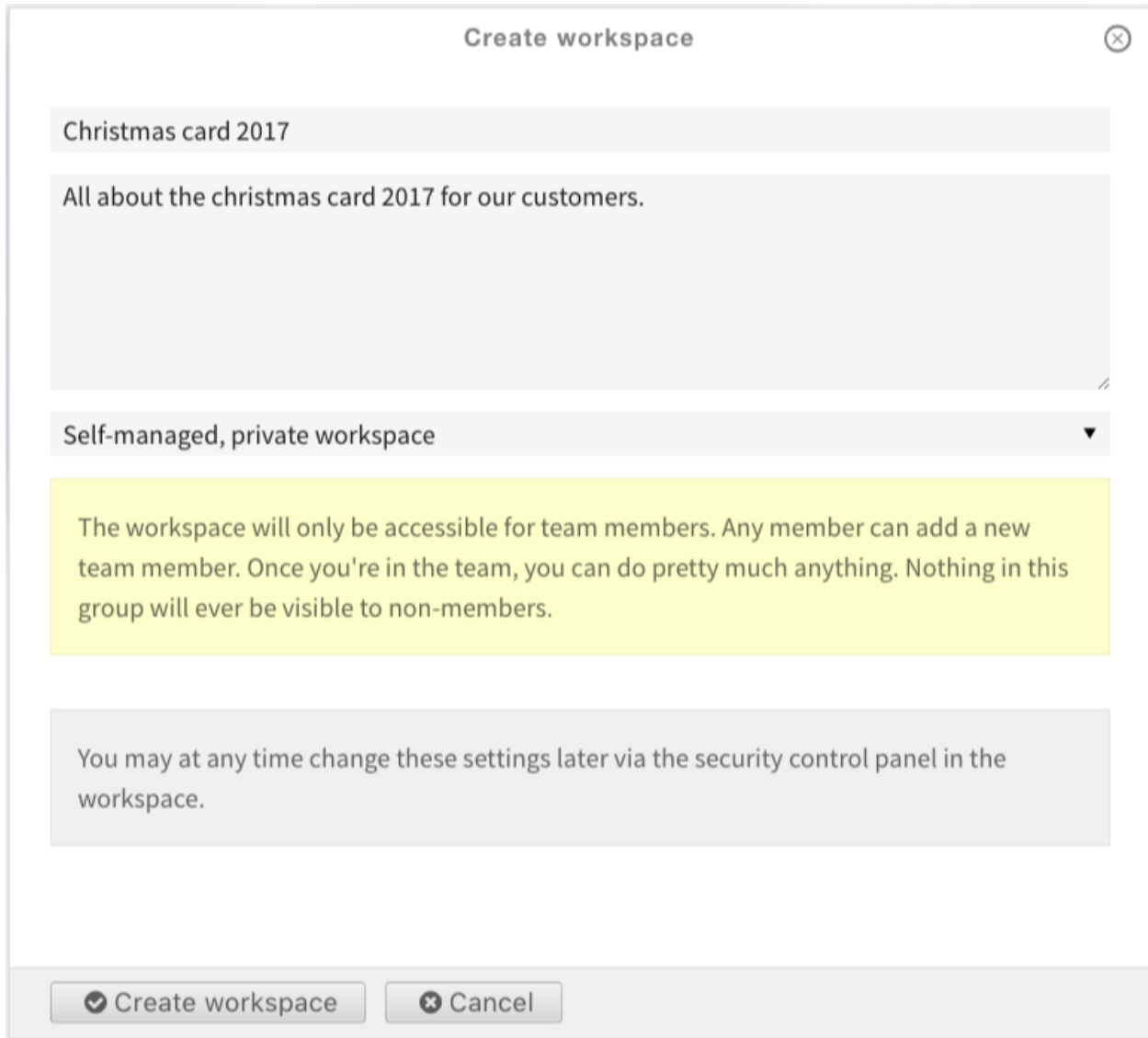
5.1.1 Create a workspace

On the workspaces overview page that was shown on the Workspaces page of this manual, you can find a plus icon above the list of existing workspaces.
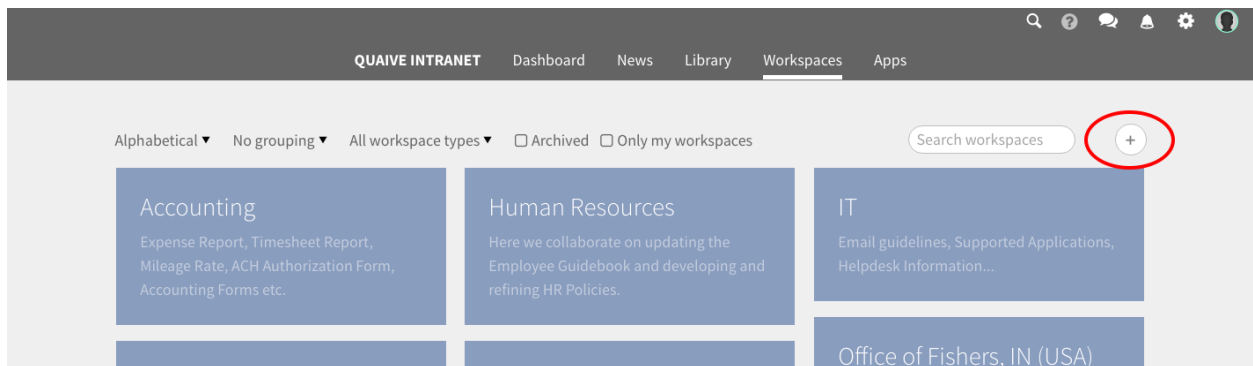
Note: If you cannot see the plus icon the user you are using does not have the necessary permissions to create workspaces within the Quaive portal. Please ask your site administrator to grant you the necessary permissions.

After clicking the plus icon, a form opens for creating the new workspace

Fill in a title and - if wanted - a short description what this workspace is about. The pulldown below the description text area is about the security settings of the workspace. For this first workspace we will use the default value for the security settings and so will create a self-managed, private workspace.

Note: You can see the different options when looking at the pulldown values and can get information about the different security policies and their effects on the workspace accessibility when selecting them. For more information on security policies please take a look here: *Security*

Then click "Create workspace" to finally create your first workspace.
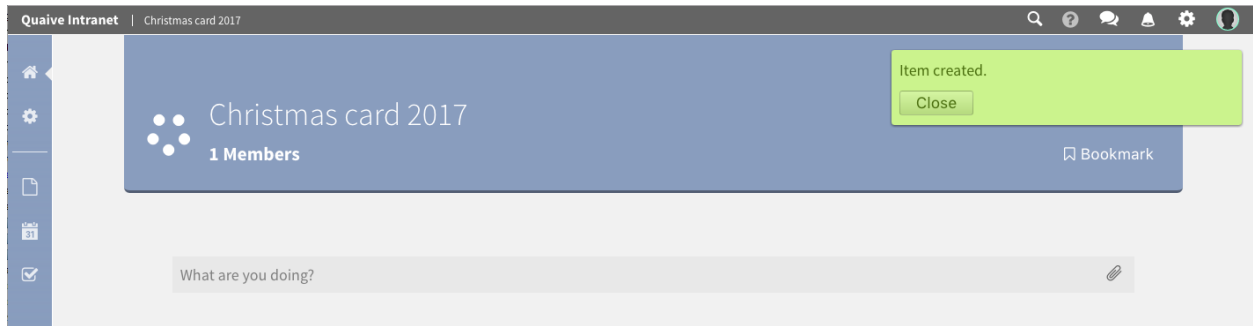
When entering a workspace you can see a set of icons in the coloured vertical bar on the left of the page. This is the section navigation of the workspace and the icons represent the different sections of the workspace. Clicking them opens the sidebar, a vertical panel for the selected section.
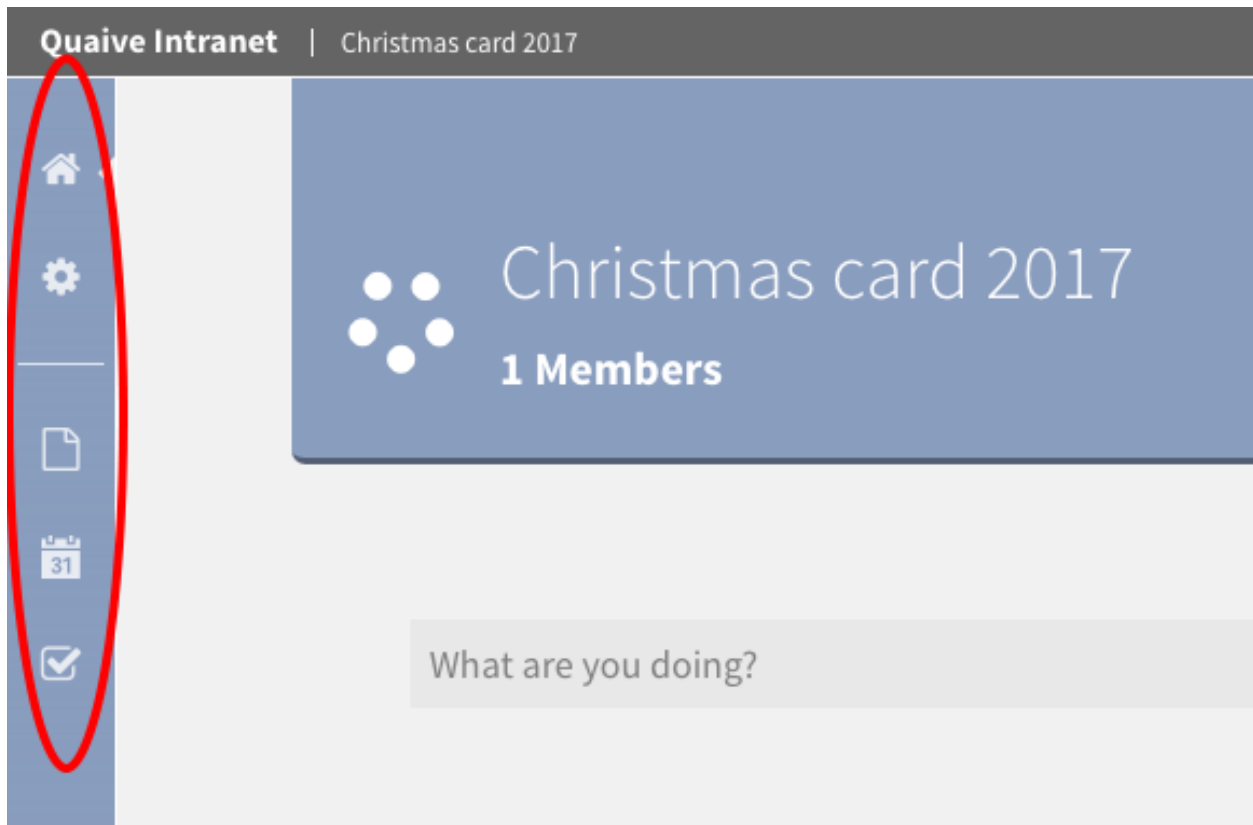
The different sections of a workspace are listed here. Click one of the links to get more information about a specific workspace sections:

- *Home*
- *Settings*
- *Documents*
- *Events*
- *Tasks*

5.1.2 Home

The first icon - the house icon - represents the home view of a workspace. When clicking on it the sidebar is closed and the main view of the workspace with the social stream is displayed.

Learn more about using the social stream here: *Social Stream*.
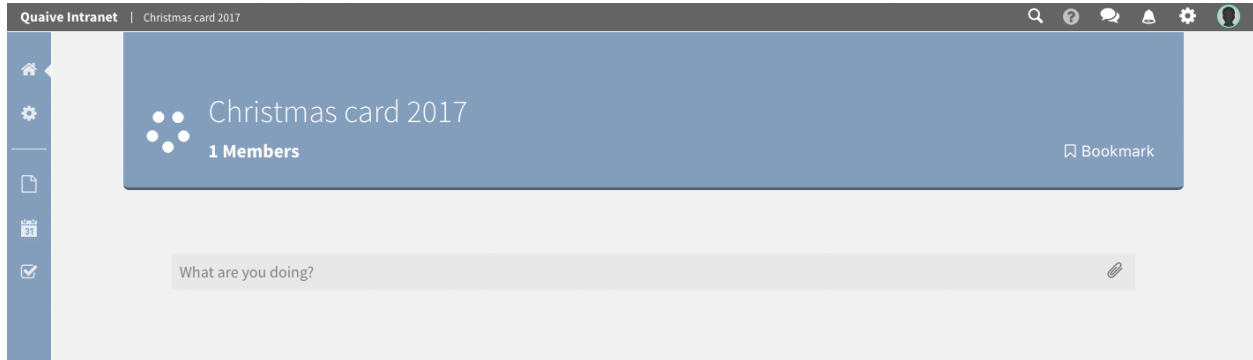
5.1.3 Settings

The gearwheel icon opens the settings section. Here all metadata of a workspace is stored and managed. Also the members of a workspace and the workspace security settings can be edited in this area.

Learn more about managing the workspace settings here: *Settings*
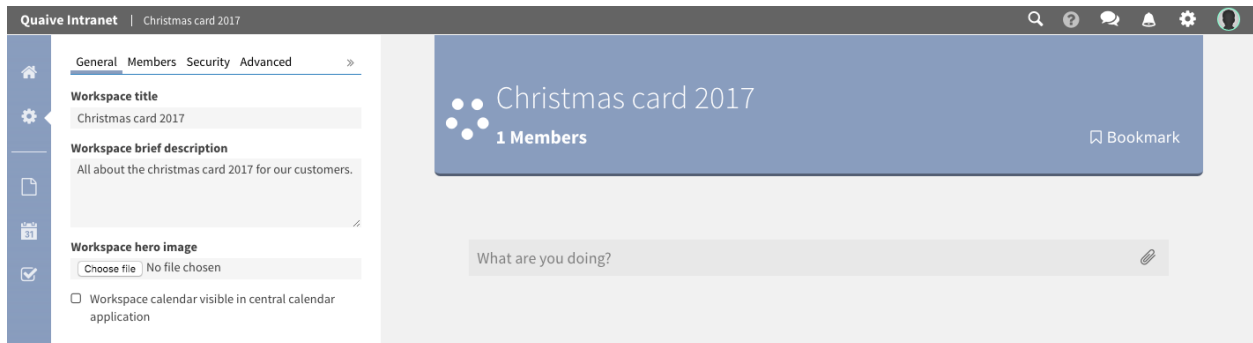
5.1.4 Documents

In the documents section all content stored in a workspace is managed.

Learn more about handling workspace content here: *Create Content*
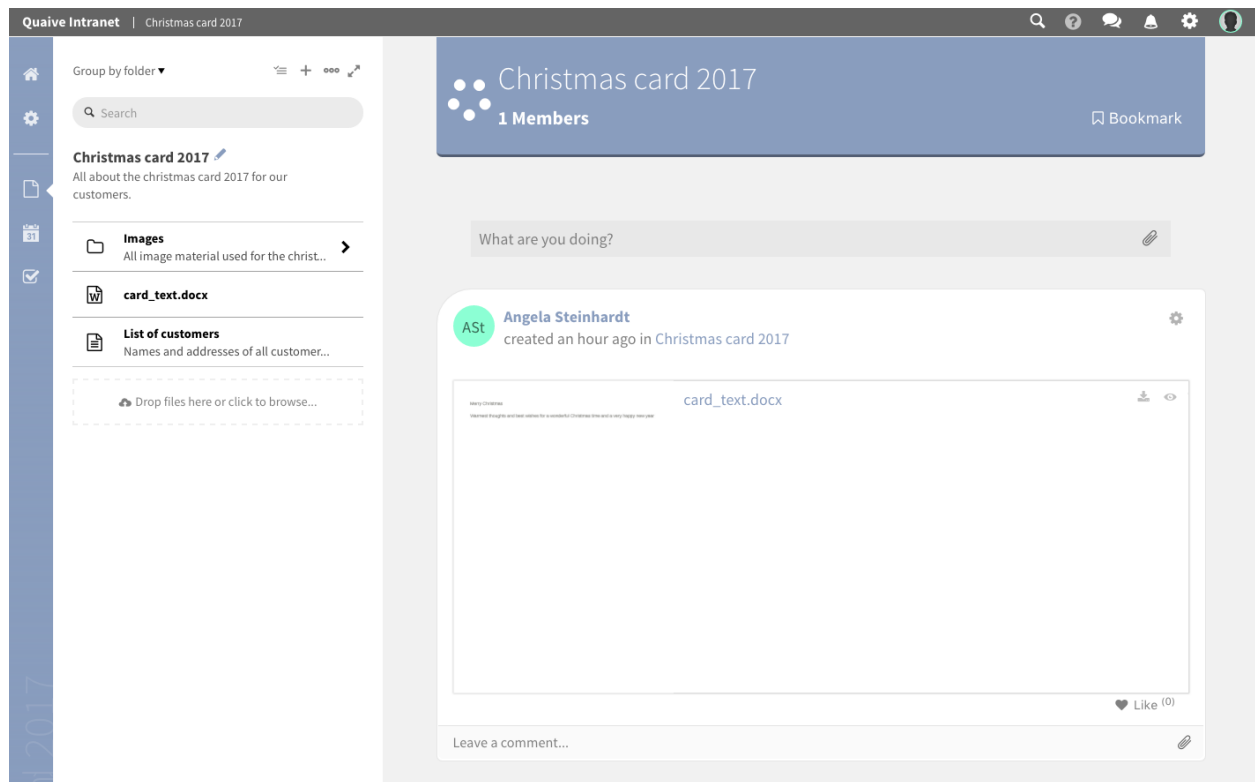
5.1.5 Events

In Quaive every workspace has its own calendar where the events of this workspace are displayed and can be managed. There is also an option to have workspace events displayed in the site wide calendar app to be served to users outside the workspace.

Learn more about the workspace calendar and handling events here: *Events*
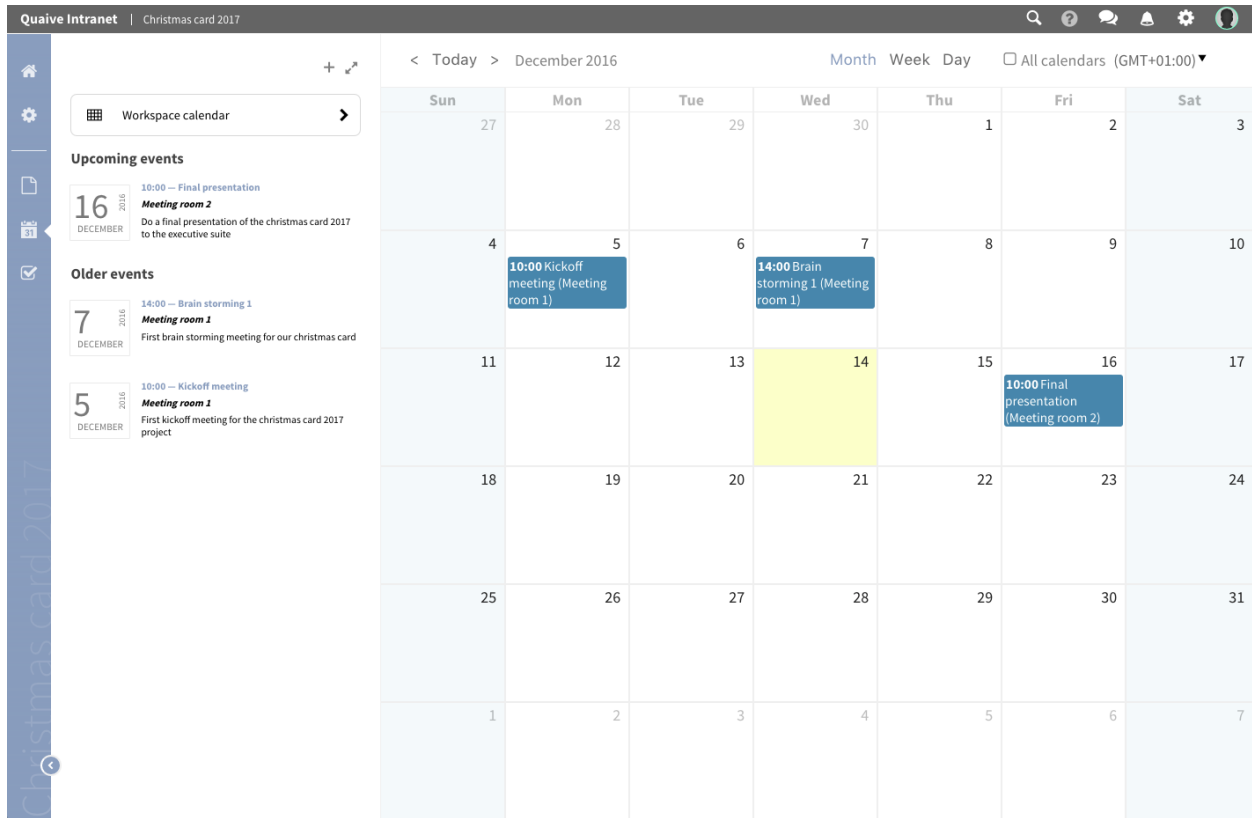
5.1.6 Tasks

In this section the tasks of this workspace are managed. New tasks can be created and you also can get an overview over tasks created and assigned to you by other workspace users. You can also see if a task is still open or already closed.

Learn more about tasks and their usage within a workspace here: *Tasks*
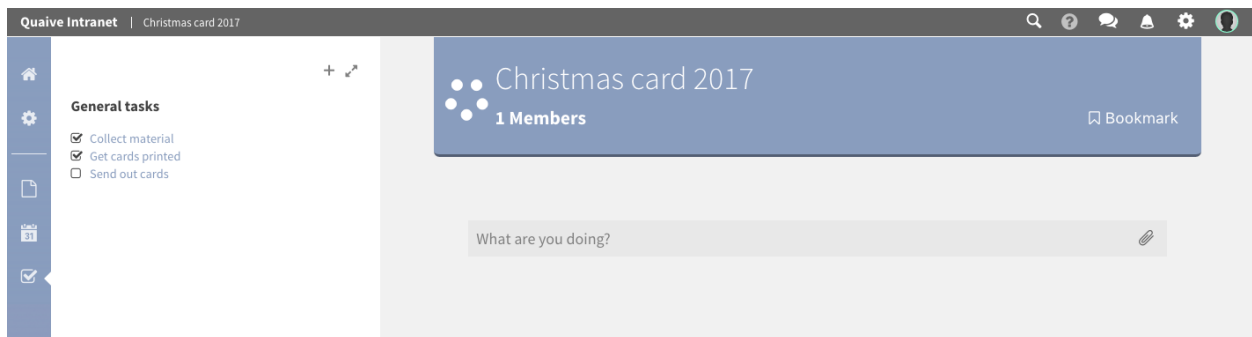
5.2 Settings

This part of the manual is about how to change the different workspace settings.

The gearwheel icon opens the settings section. Here all metadata of a workspace is stored and managed. Also the members of a workspace and the workspaces security settings can be edited in this area.
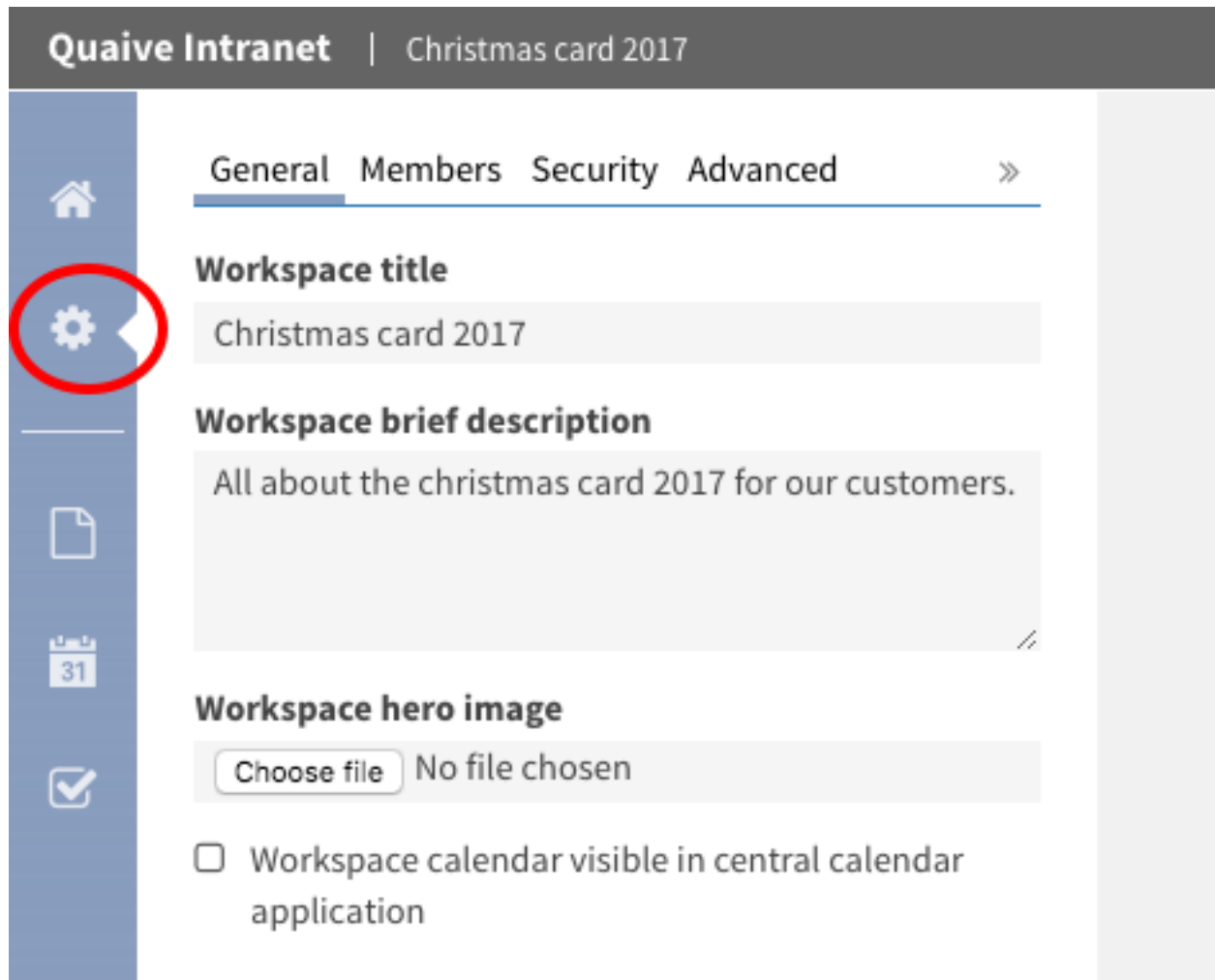
When in settings section, you can see several tabs at the top of the sidebar. These tabs open the available subsections of the workspace settings:

- *General*
- *Members*
- *Security*
- *Advanced*

5.2.1 General

Here general metadata like title, description and the workspace's hero image can be changed.
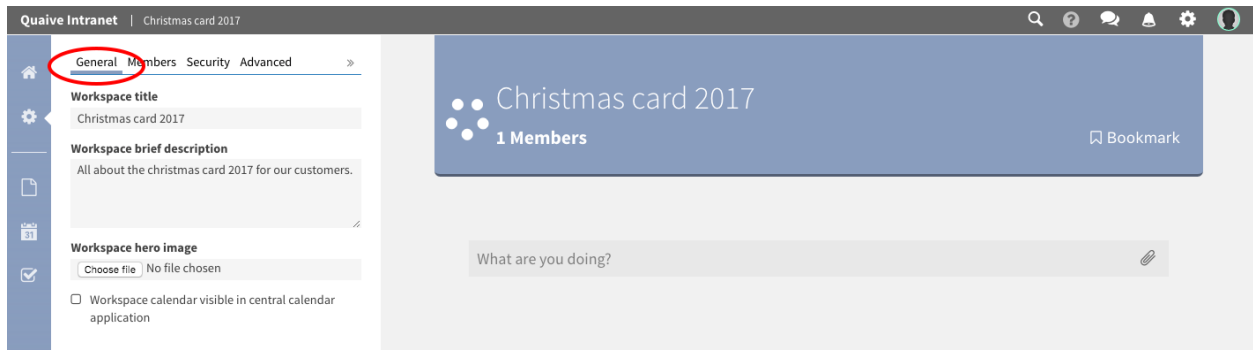
How to change title and description of a workspace

To change a workspace's title and description just type a new title or description in the text field or area in the sidebar.
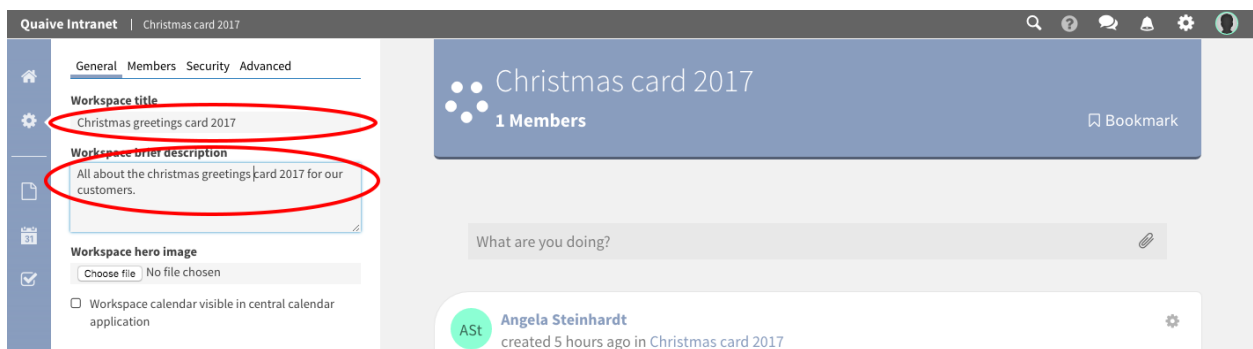
The metadata is immediately autosaved and a info popup tells you that some attributes have been changed.
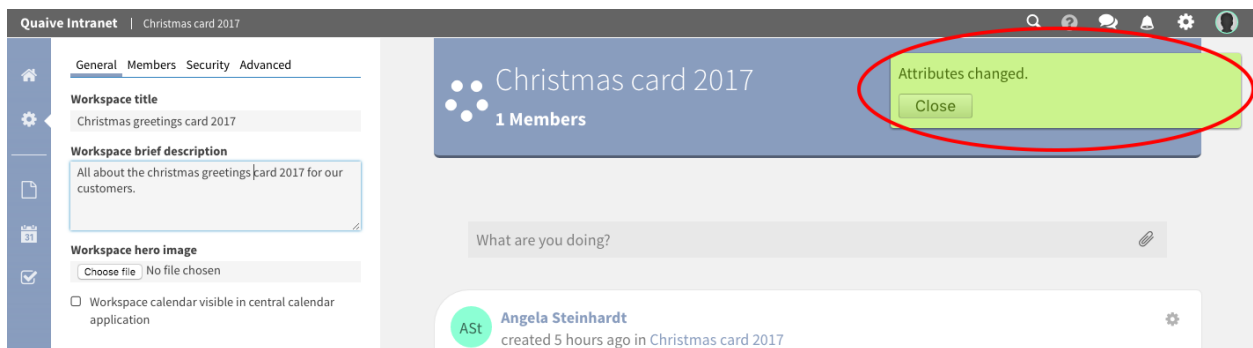
After the page is reloaded you can see the new workspace title in the breadcrumbs and the workspace header.
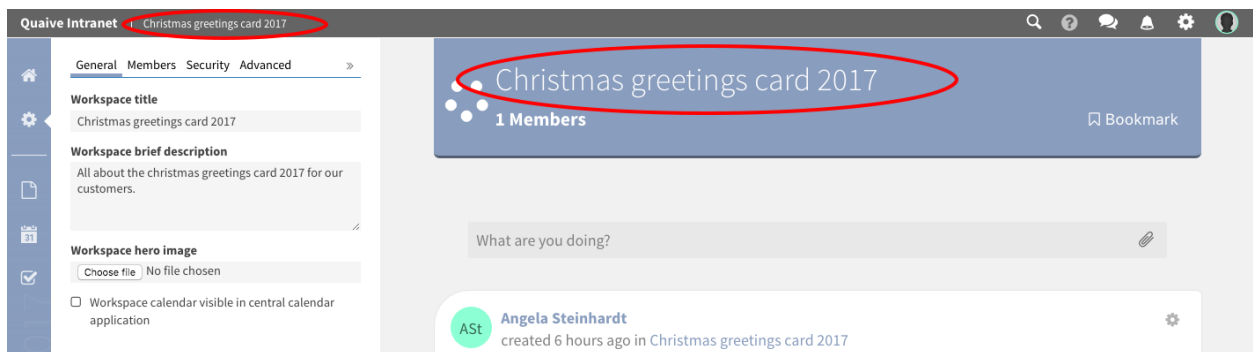
How to change the hero image of a workspace

Each workspace can have a hero image to be displayed as a visual element in the workspace's header section background. Changing this image can also be done in the general settings section.

To change the image click the "upload" button in the sidebar and select an image in the opening file browser of your computer.
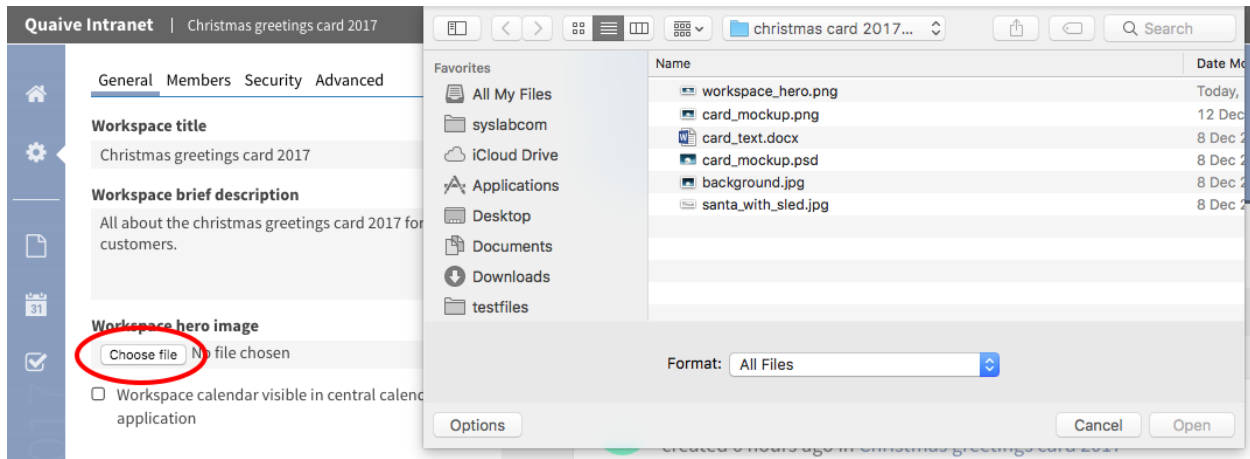
The image will be changed immediately as the metadata again is autosaved.

Reloading the page will display the image in the header section of your workspace.
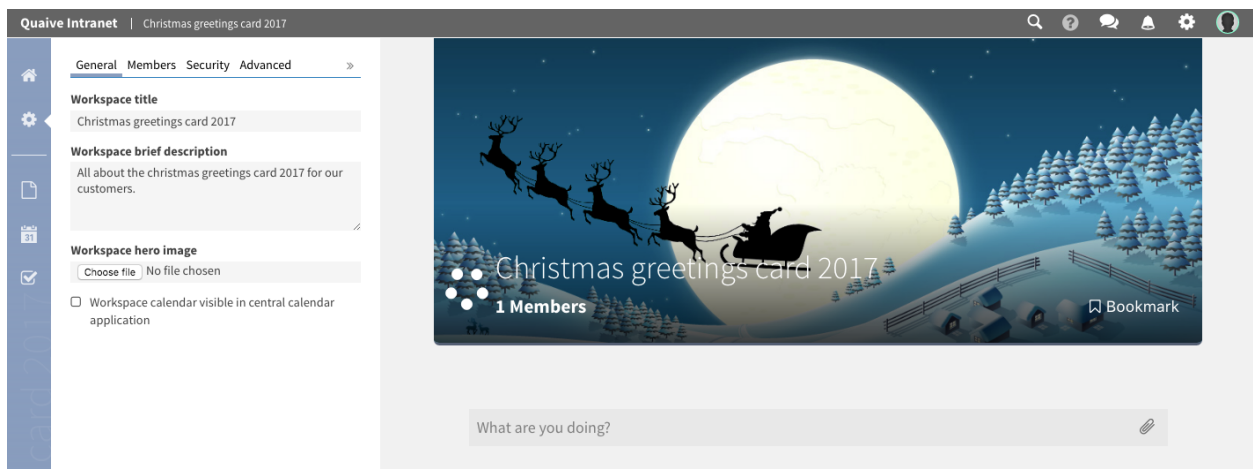
How to display the workspace events in the global calendar

There is a possibility to display the events of your workspace in the global calendar app. To enable this you have to check the checkbox "Workspace calendar visible in central calendar application"

Learn more about events and the workspace calendar here: *Events*

5.2.2 Members

In the Members section you can see which users and groups are members of this workspace and which roles they have on it. Here you can add new members or groups, delete existing ones or change the specific role of a member or a group.
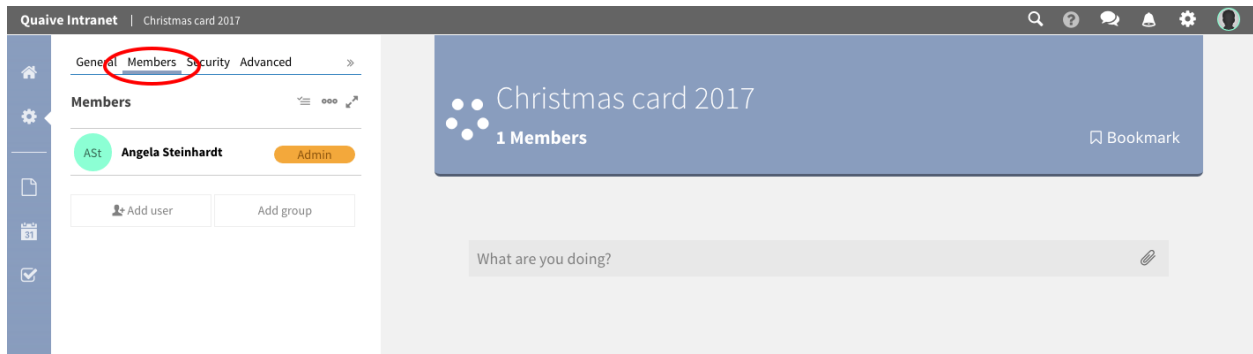
5.2.3 Security

On the security panel you can see the current security settings of the workspace. This is called the workspace policy. You can get information about the external visibility, the join policy and the participant policy of a workspace. All these settings of a workspace can be changed for existing workspaces whenever needed. Short explanations offer information about the current and possible options for these settings to make sure what effects on the workspace and it's content a change has.
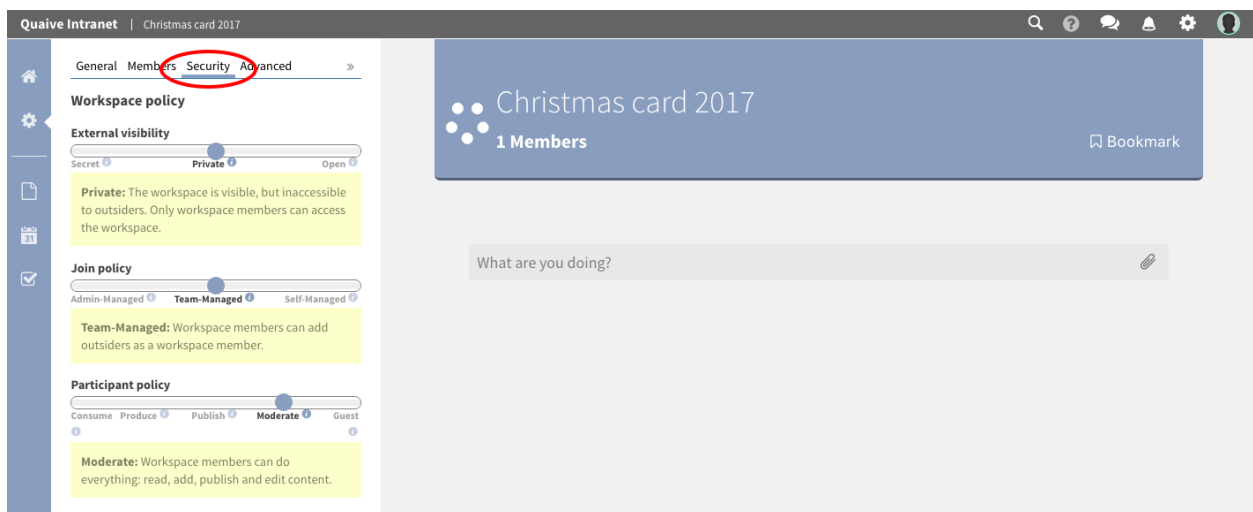
5.2.4 Advanced

In the advanced settings section extended functionality on a workspace can be found such as setting up related workspaces, division support but also actions like archiving, freezing or deleting the workspace
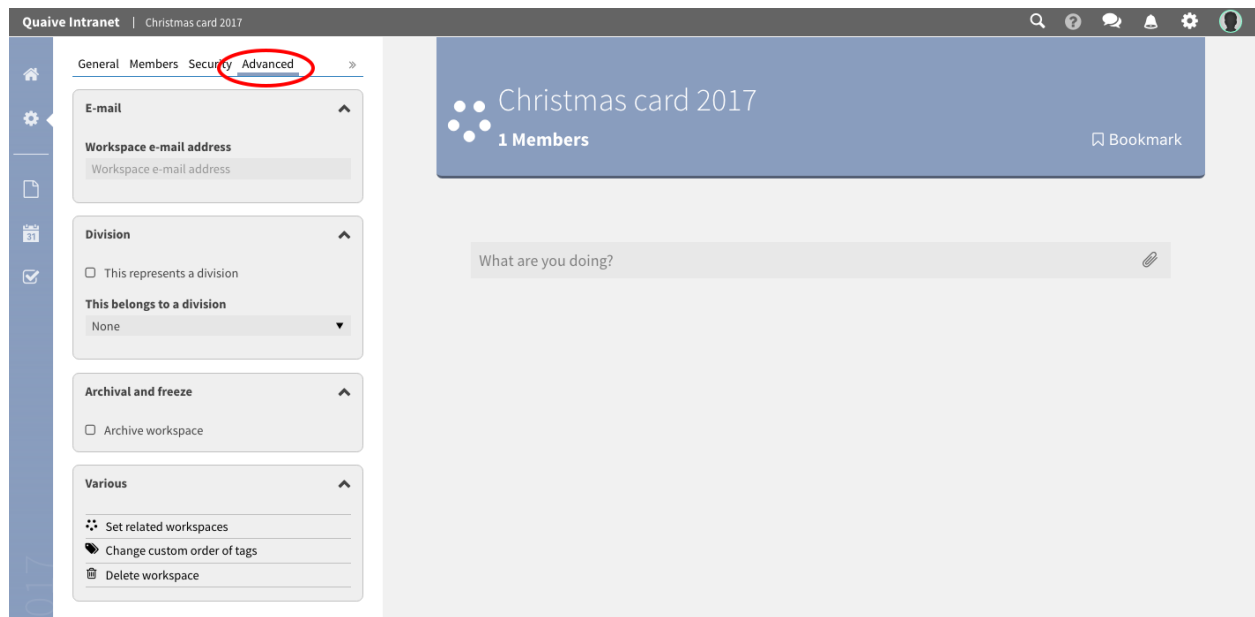
5.3 Create Content

This part of the manual is about how to use and create content in an existing workspace.

The page icon opens the documents section. Here all content of a workspace is listed and managed. There are several content types available to store and manage data in a workspace:
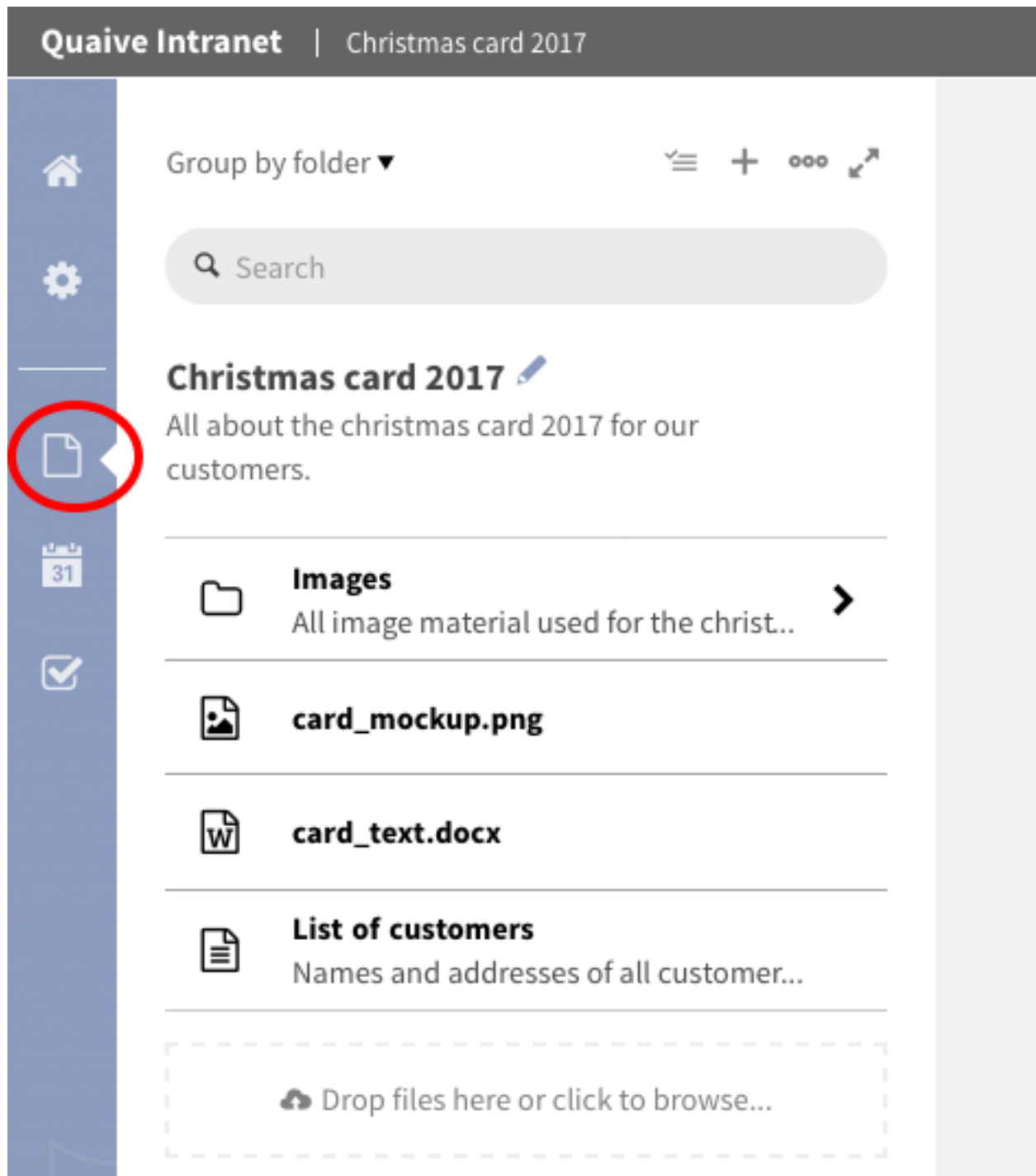
The main content types for workspaces currently existing in Quaive are:

- *Document*
- *Folder*
- *Image*

- *File*

In this section, the works as a file browser where the existing content of a workspace is presented in a list as you know it from the file browser on your computer. There are several possibilities to group, filter or search for the elements in the sidebar to help you managing your content.

Learn more about using the sidebar for managing workspace content here: *Manage Content*

5.3.1 Document

The document is the basic content type in Quaive. Documents are used to store text and have basic formatting possibilities to display it.

How to create a document

To create a document a workspace, click the dots icon in the sidebar to open the more menu.
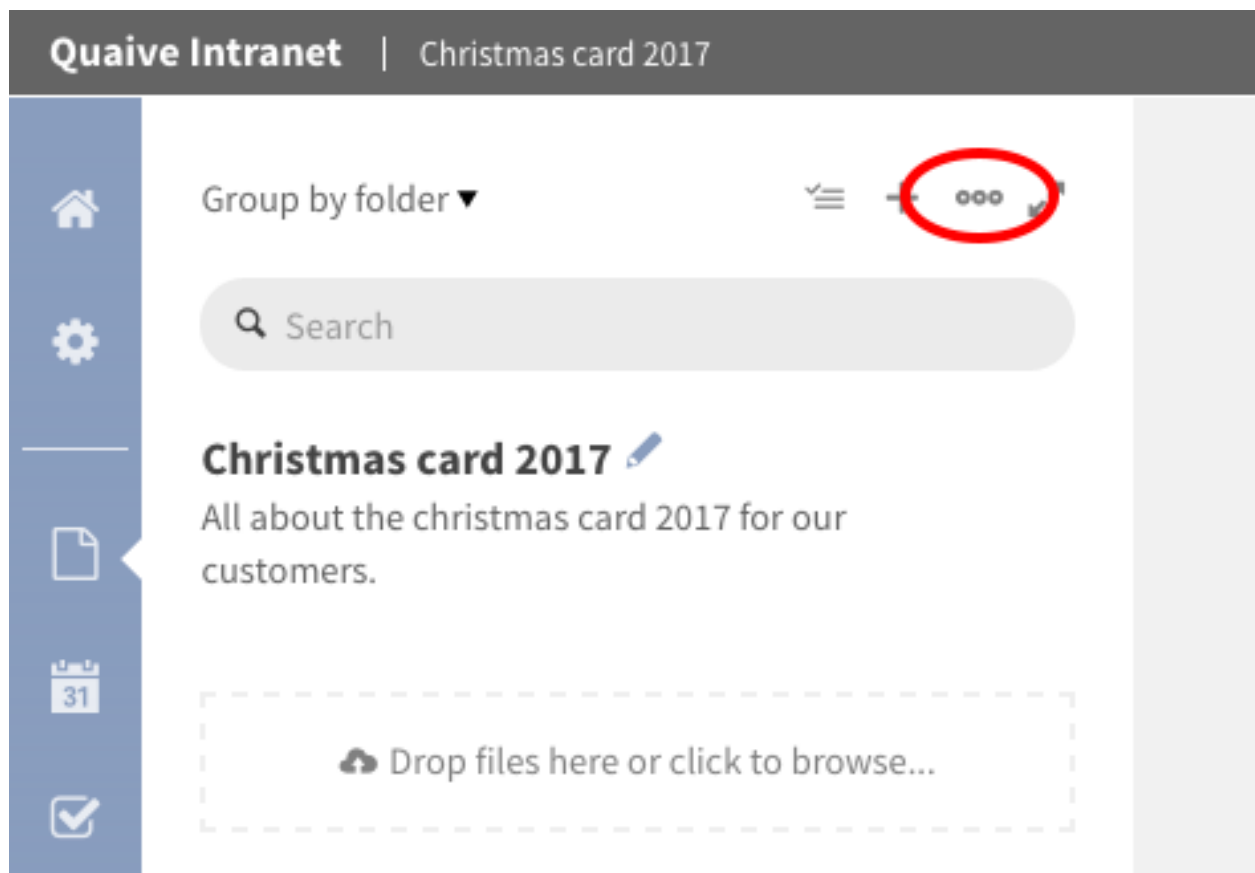
Select "Create document" from the list of actions.
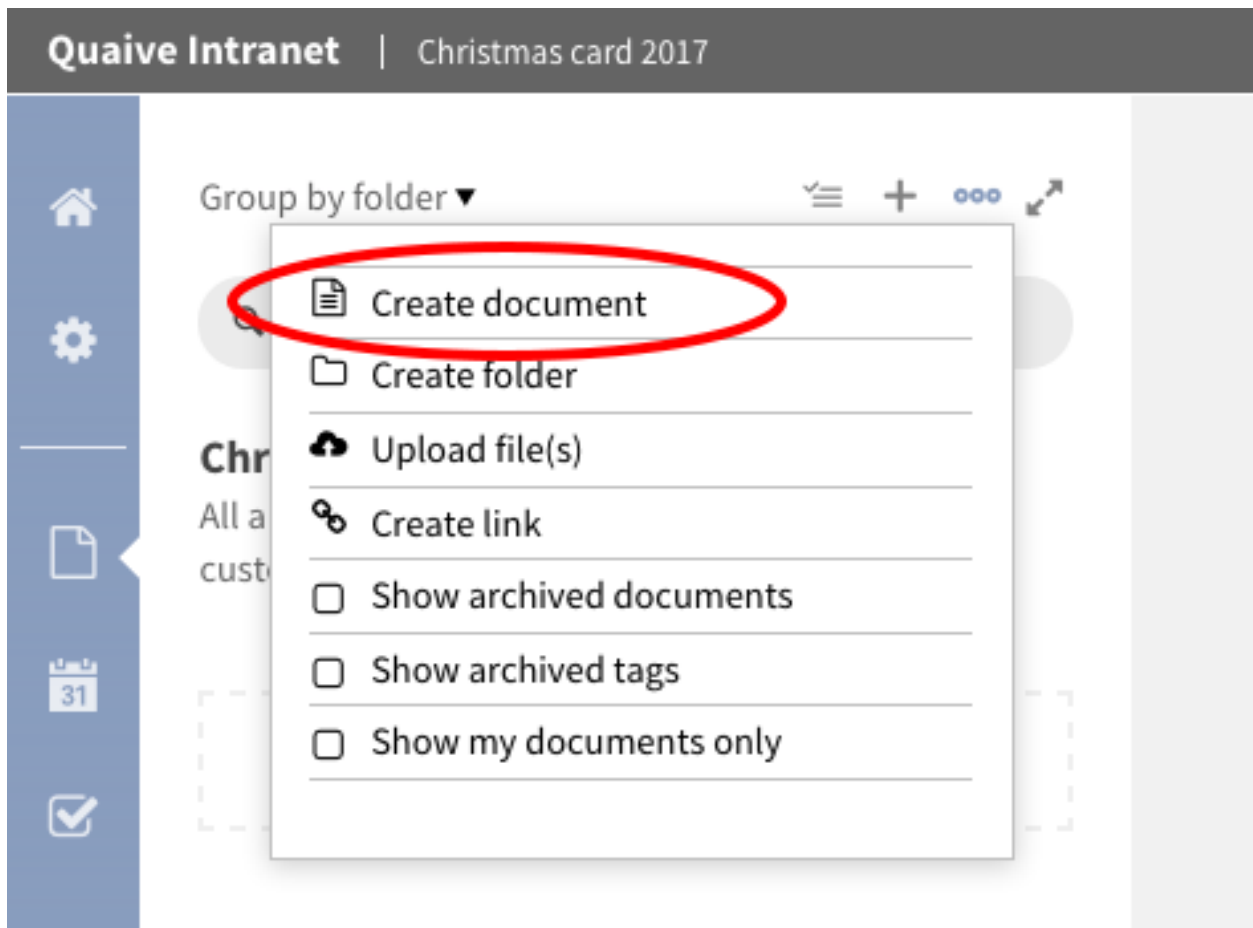
A form opens where you can choose the object type to be added. As "Rich text" is already selected, you do not have to change it. Type in a title and if wanted a short description for your new document and click "Create".
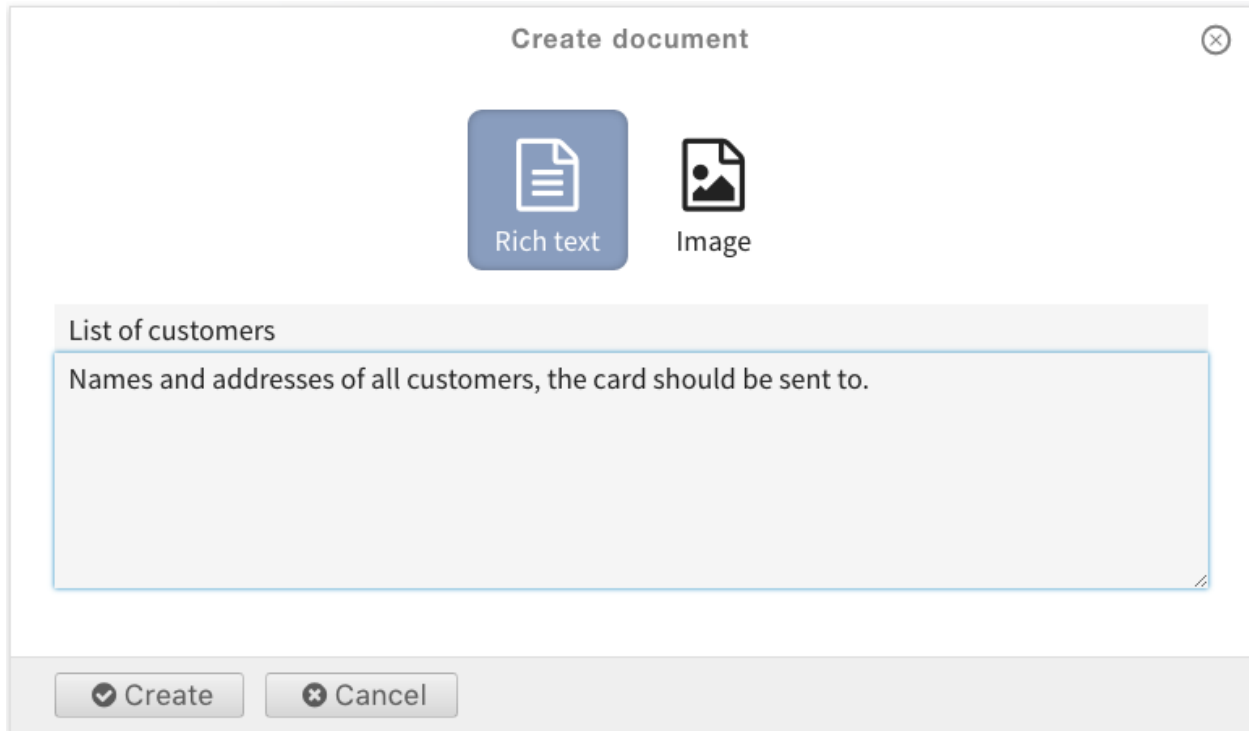
Your document is created and can be edited.
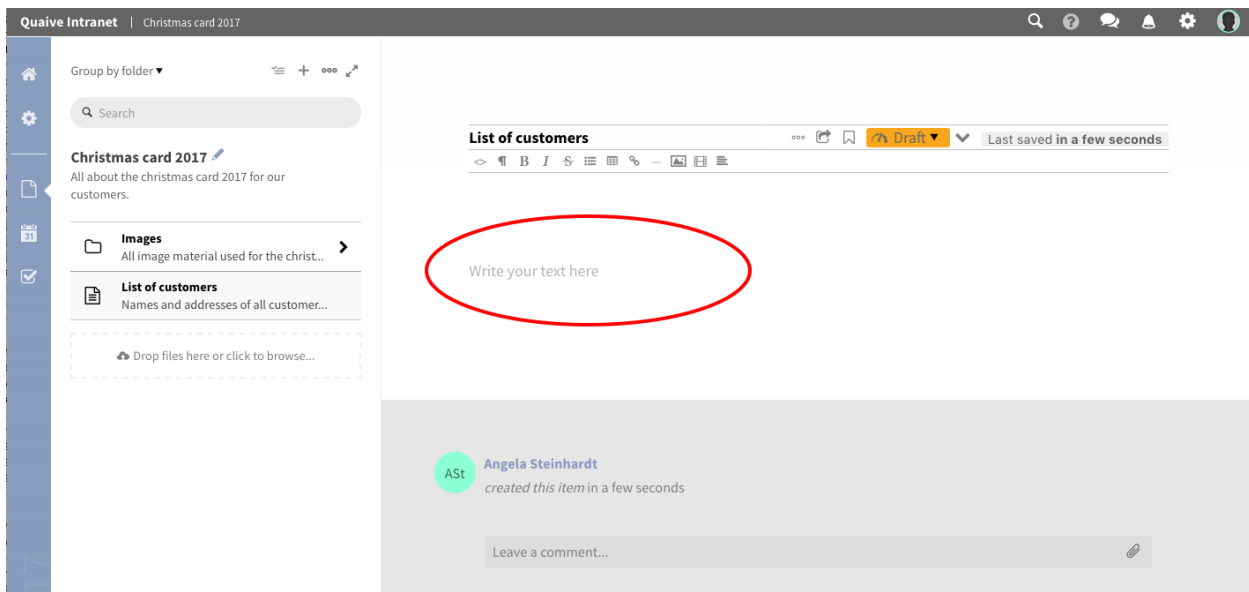
Type your text in the given text area of the open document. For formatting you can use the editor functions above the text-area which allow basic formatting as list elements, tables and also embedded images or links.
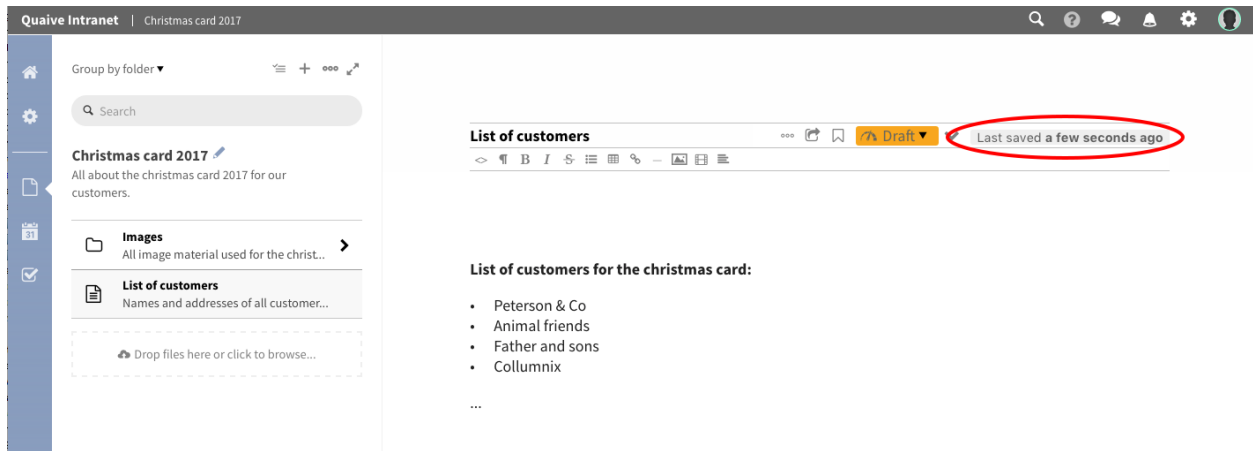
5.3.2 Folder

Folders in Quaive work much like they do on your computer. They can be used to structure and organize the content of your workspace. A folder has a title and a description and can store all other types of workspace content.

How to create a folder

To add a new folder, click the dots icon in the sidebar to open the more menu.
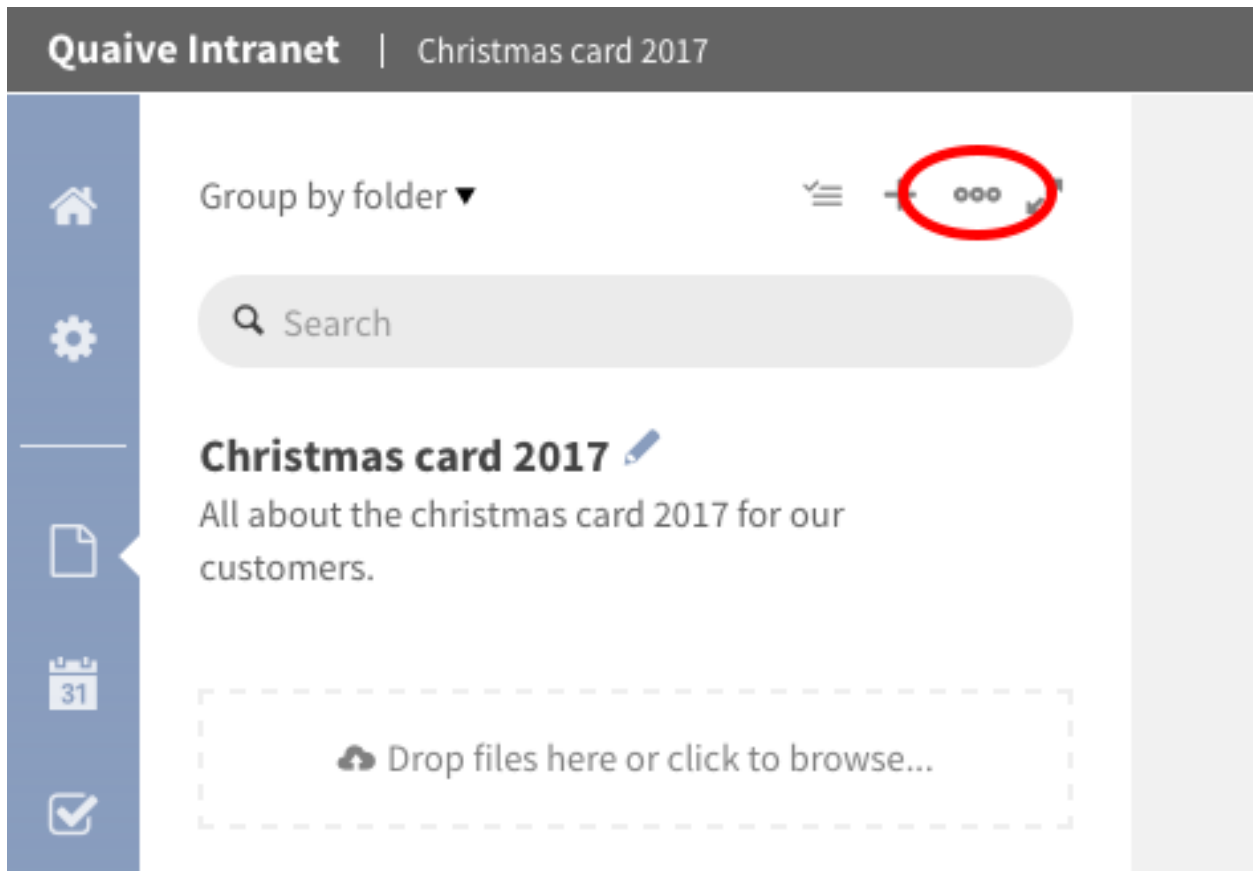
Select "Create folder" from the list of actions.
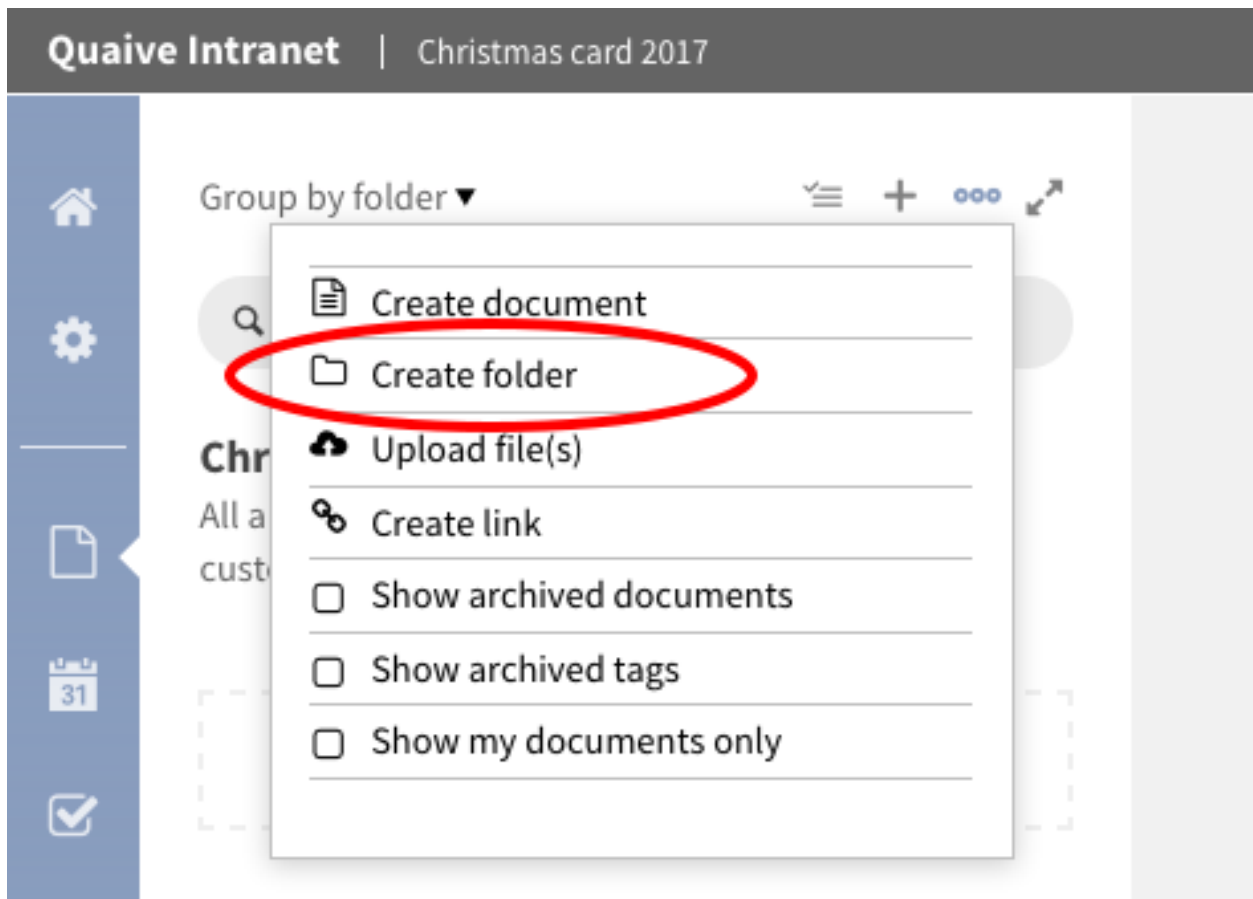
A form opens where you can type in title and a short description of your new folder.

After clicking the button "Create" the folder is added to your workspace and immediately opens in the sidebar. Now you can add content to your new folder.

You can change title and description of existing folders by clicking the pencil icon behind the title of the folder in the sidebar. To get one level up back to the workspace's root folder click the link on the workspace title above the sidebar search field.
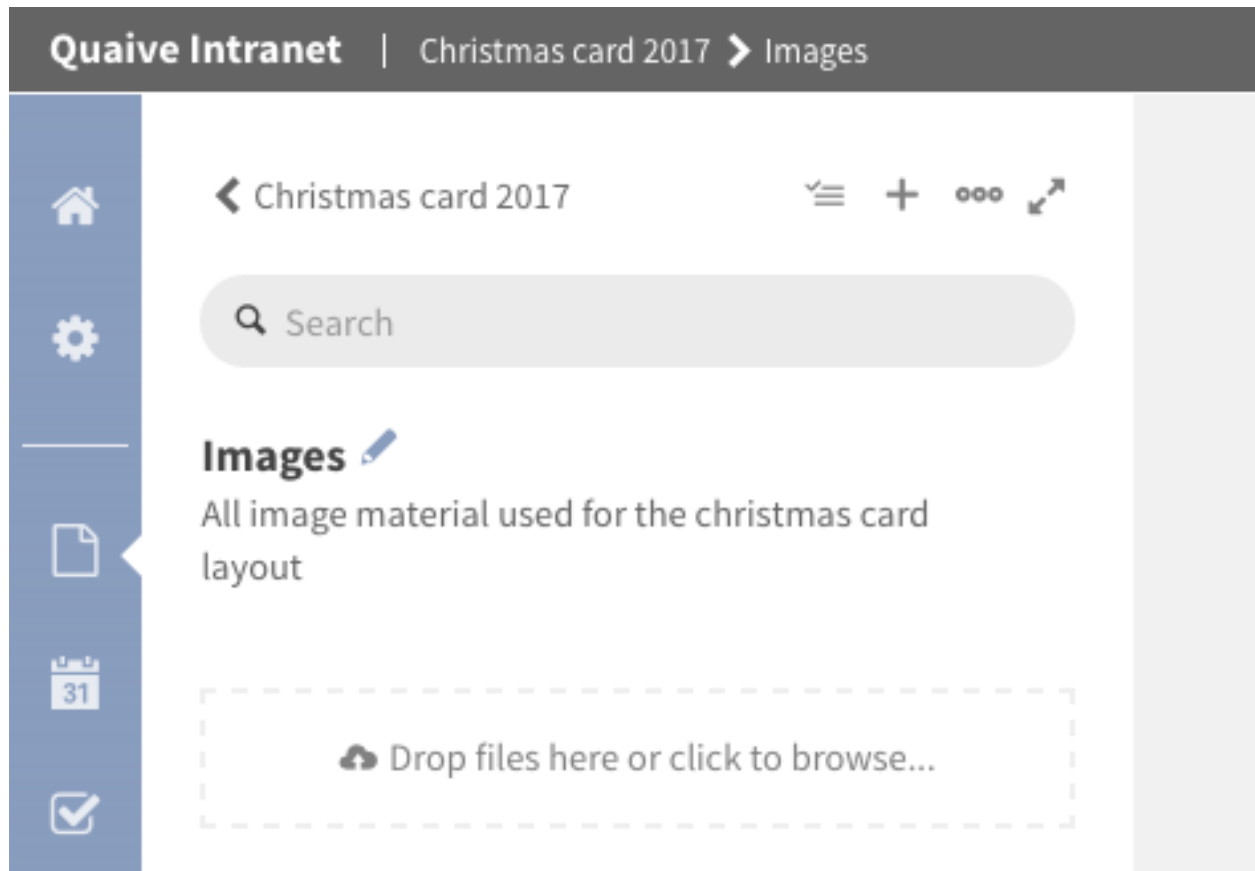
5.3.3 Image

An Image object in Quaive is used for uploading image files (JPG, GIF, PNG) so that you can insert them into Quaive documents or just have them stored in your workspace.

When uploading an image a preview is generated automatically to make it easy for you to find your images within the workspace.

How to upload an image

Images can either be created as described in the section "How to create a document" or - as files - simply uploaded. As the method to create an image object is almost the same as for documents we will take a closer look at the uploading method here.

When looking at the sidebar within a workspace or a folder in document section, you can find an upload area below the list of content.
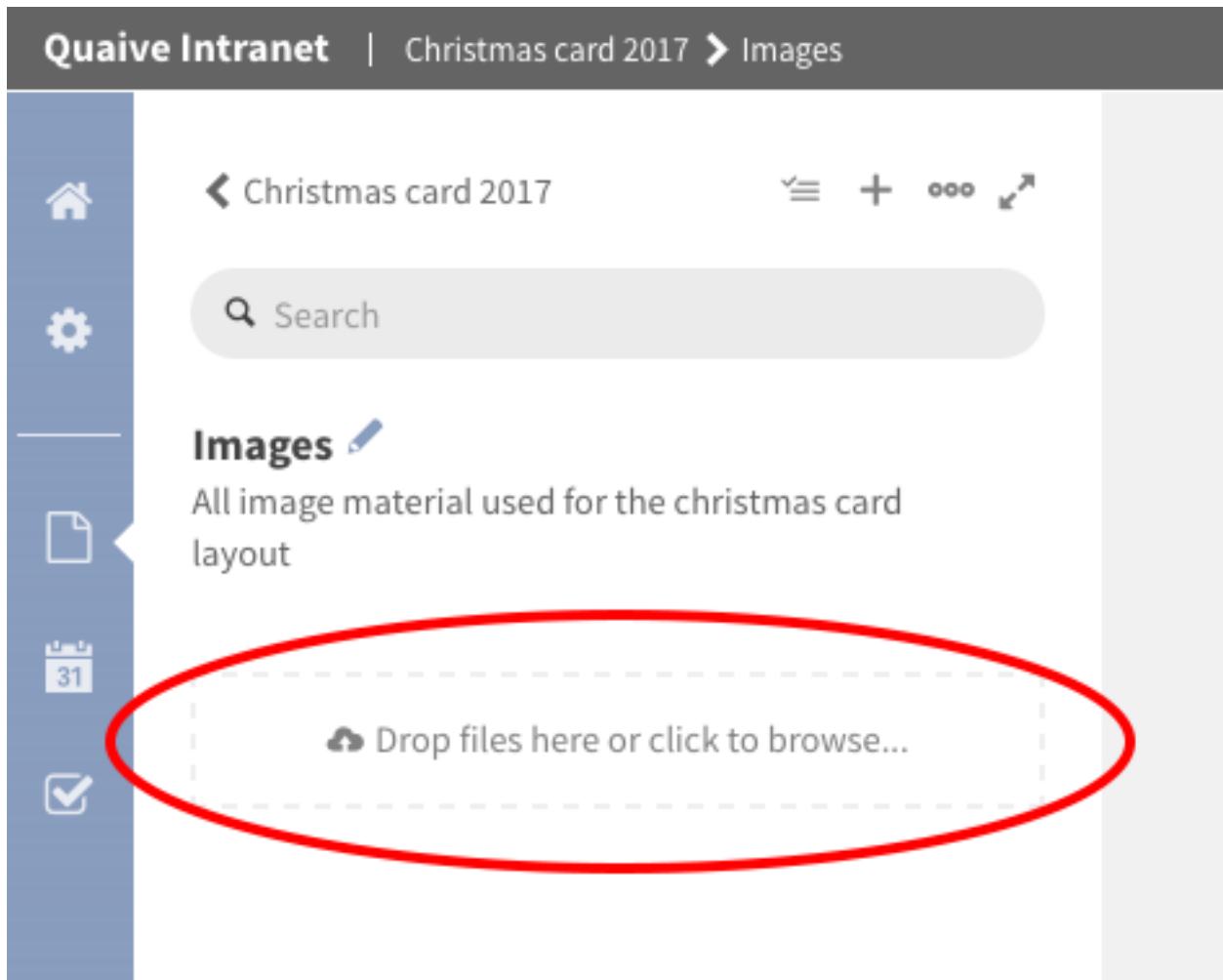
This area is used to upload an image (or also a file). To do this you have two possibilities: You can either click the link within the drop area and select an image via the opening file browser
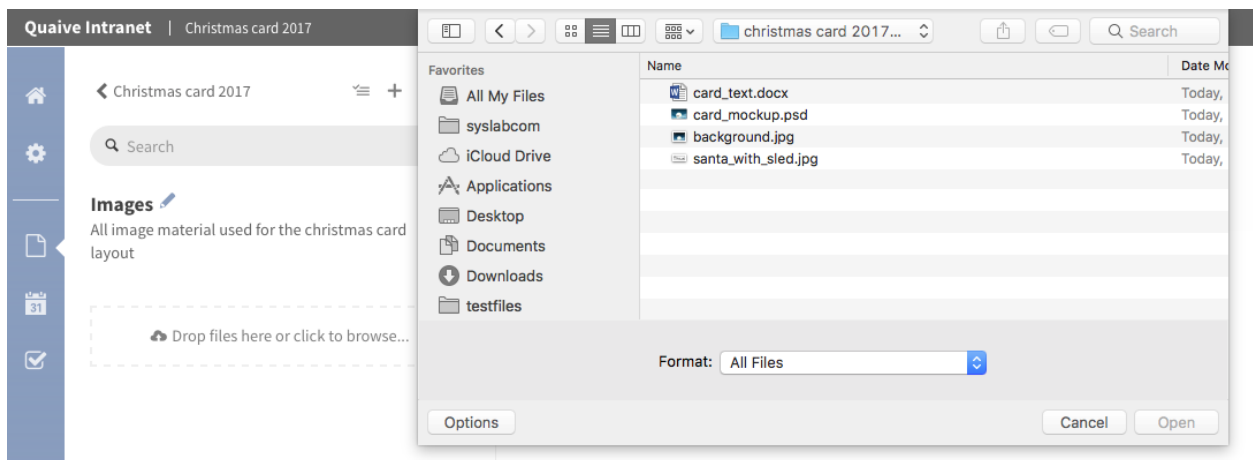
Or you can just add image(s) by dragging the image(s) you want to add from the file browser of your computer over the drop area
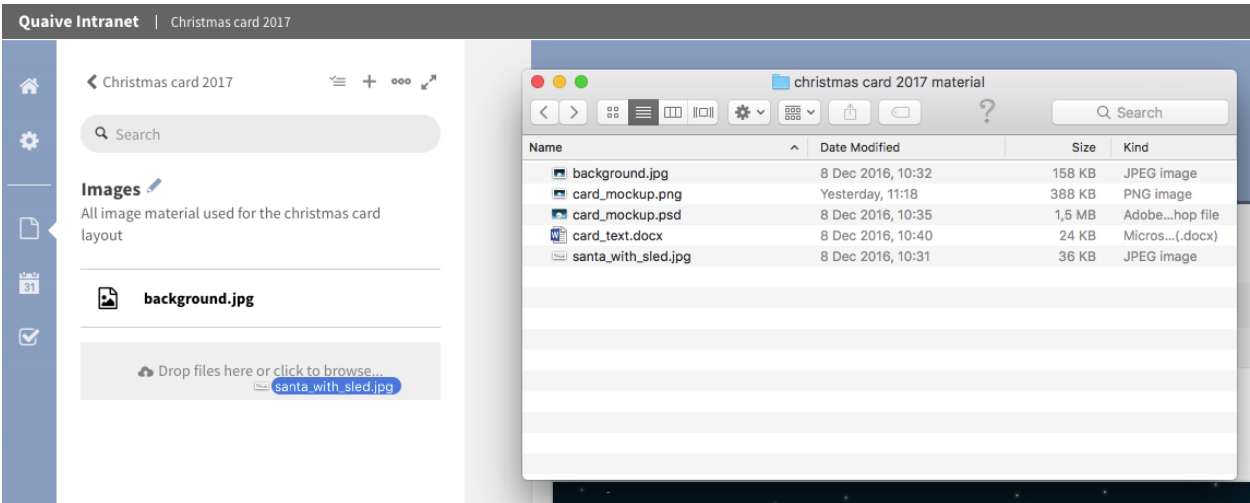
Both actions have the same effect, the image (or if more were selected images) is queued for upload below the upload area and you can watch the upload process of several objects easily.
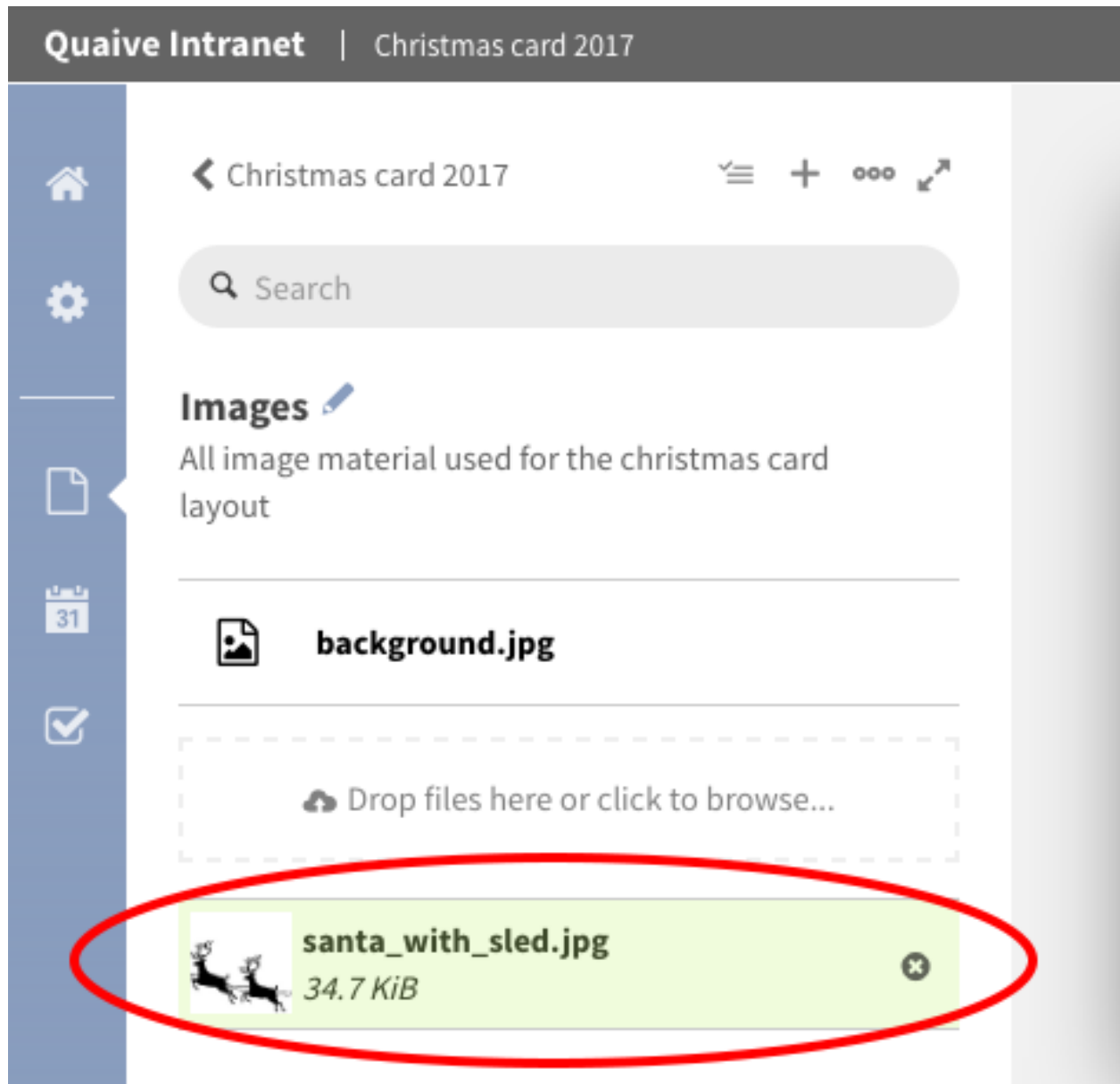
After the upload process has finished, the image occurs in the list of object in the sidebar. To view the image, simply click on the list entry and the image is opened in the main content area.
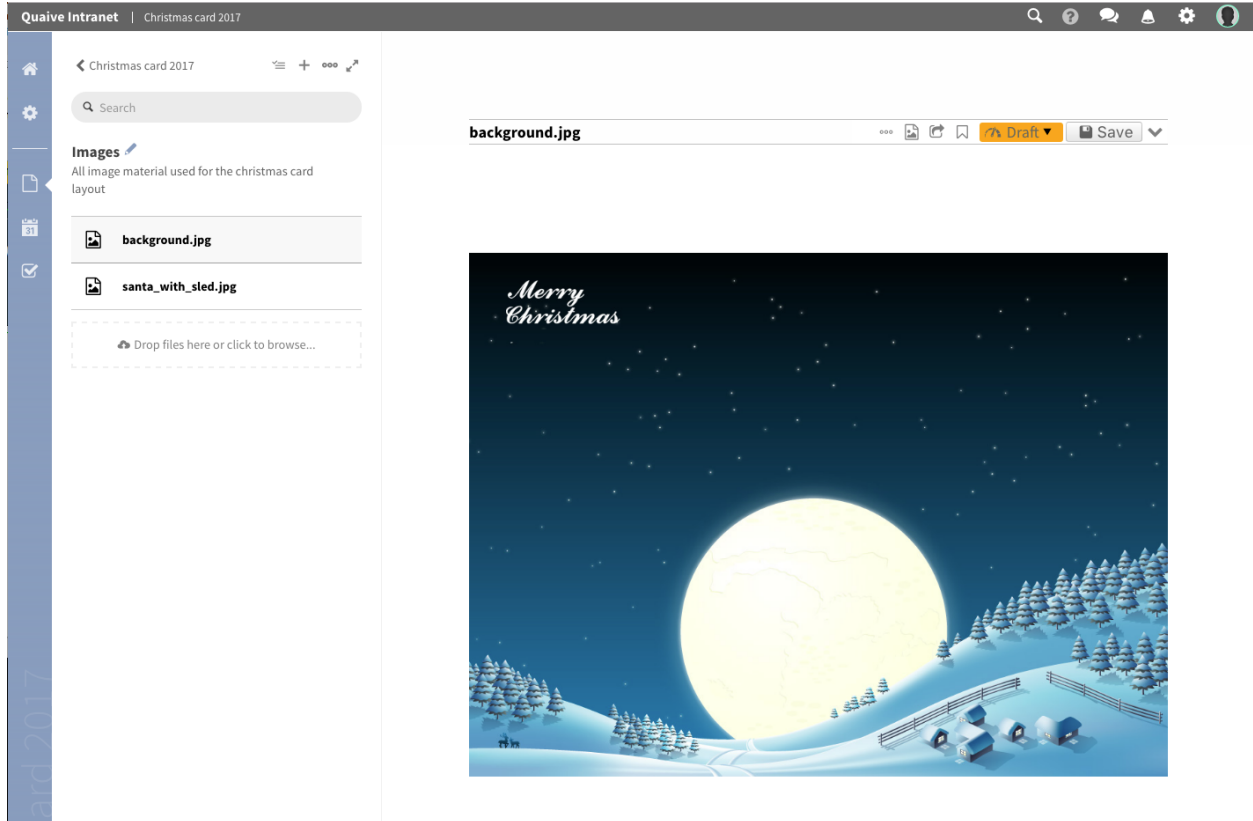
5.3.4 File

A File in Quaive is one of the most powerful objects as it can hold any kind of binary file you wish to upload with the intent to be downloaded by your site visitors. Common examples are PDFs, Word Documents, Excel tables and spreadsheets. For the uploaded file a preview is generated automatically to give the user an idea of what the file is about.

There is also the possibility to have version management for files in Quaive. This is a powerful method to view and even restore older versions of a file and also get an overview over the versions in a table like version history view.

Read more about versioning here: *Versioning*.

How to upload a file

Uploading files works exactly the same way as uploading images - so for a how to please read "How to upload an *image*"

5.4 Manage Content

In the documents section of a workspace the sidebar presents the content of the current workspace in a similar way a file browser on your computer does. This enables you to get an overview over the content of your workspace.

To improve organization there are several display options to group, filter and hide content objects. A powerful search option also helps to find special objects in even large workspaces within a few seconds.

Besides display functionality the sidebar also offers a lot of batch actions and other functionality:

- *Group by option*
- *Sidebar search*
- *Display options*
- *Batch actions*

5.4.1 Group by option

5.4.2 Sidebar search

5.4.3 Display options

- show archived files
- show archived tags
- show my documents only

5.4.4 Batch actions
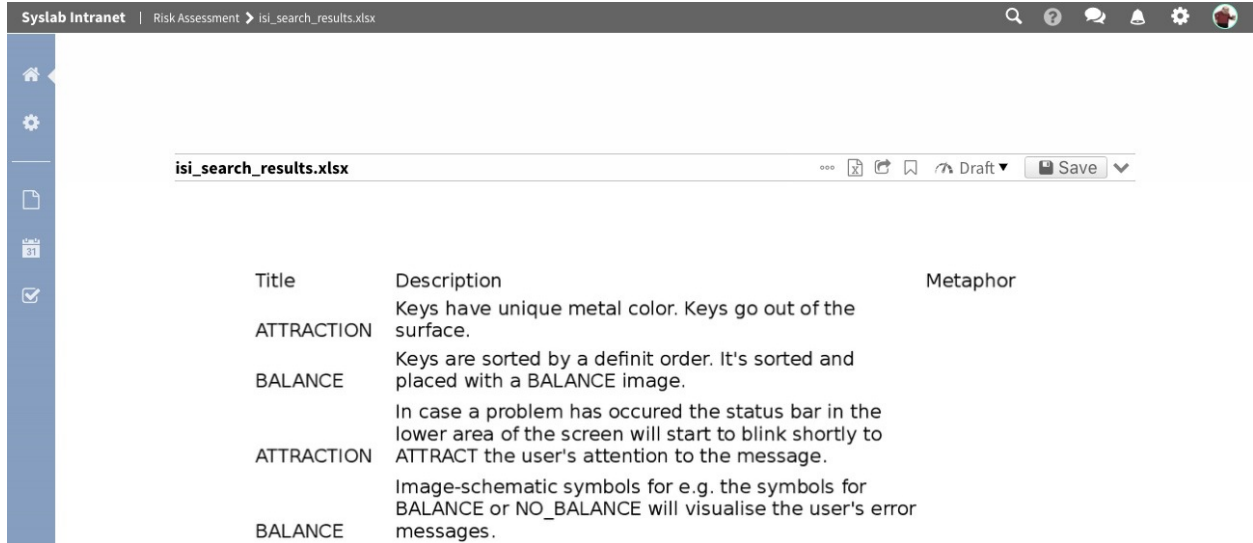
- select mode
- cut/copy/paste
- send
- archive
- download
- delete
- re-tag
- rename

5.5 Versioning

Versioning for uploaded files can be enabled optionally. Please contact your site's administrator for enabling it.

If versioning is enabled and you are uploading a new version of a file that already exists in Quaive, then the old version of the file is not simply replaced, but kept in the system. Although users will then see the new version of the file by default, they can still access previous versions of it.

The example below shows an Excel file that is present in a workspace. We can see the preview for this file:

If you click on the symbol with three dots, you can open the version history:

It shows only one entry, for the initial action:

We have detected a typo in the Excel file. Therefore we want to upload a new version of it. In the edit form, we tick the check-box "Save a new version", select the file to upload, and optionally provide a comment that explains the changes made. A click on the "Save" button uploads the file and creates a new version:
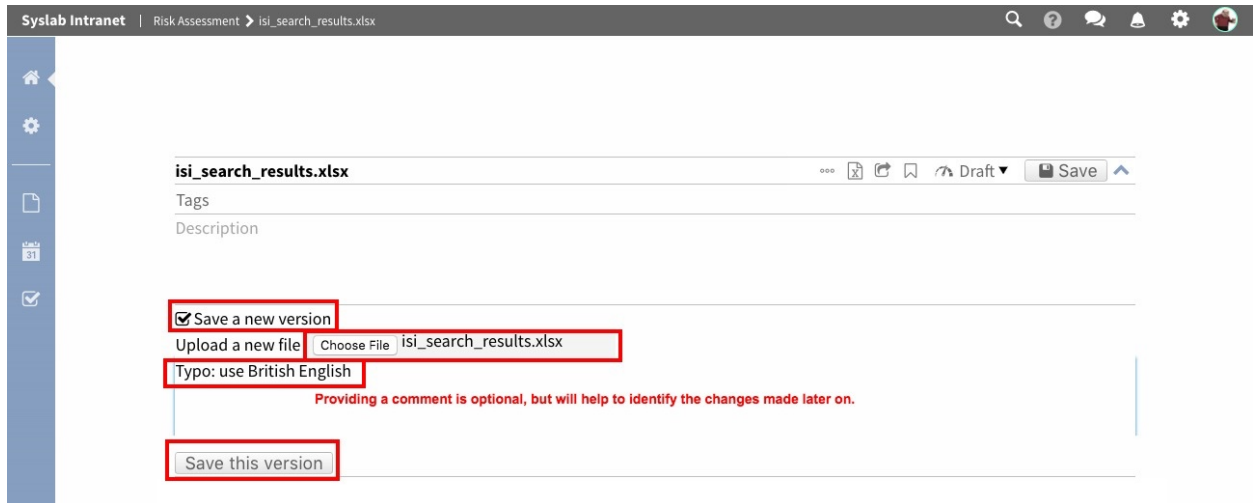
After a short while, the preview is re-generated, reflecting the updated state of the file:
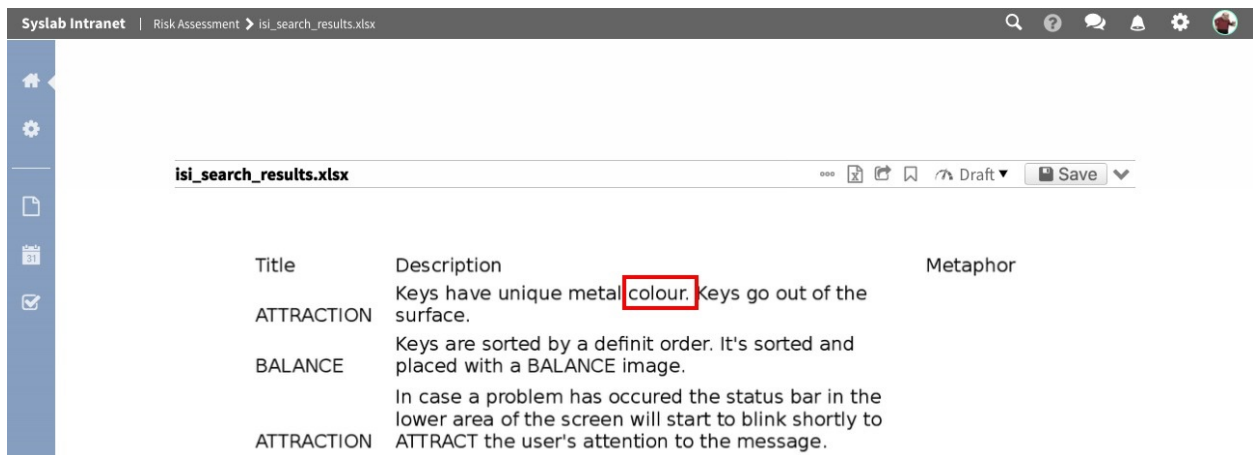
If we look at the version history again, we can see a new entry about our change. We see *who* made the change, *when* the change was made and *what* the nature of the change was ("edited"). Also, we see the manually entered change note. By clicking on the "View" link next to a version, we can jump to the details page.

On the details page for a specific version, we see at the top again the list of all versions. At the lower part of the page, we see the details of the version we are currently viewing. Most importantly, we can use the "Download" button for downloading this version of the file.

In case a new version is not wanted, a click on "Revert to this revision", next to one of the older versions in the table

above, will restore the selected older version.

5.6 Locking

New in version 1.2.

Quaive provides locking support to prevent concurrent edits on the documents.

When the user starts to edit a document, the document goes in to a locked state.

This is transparent for the user editing the document, but other users that will visit the document will find a locked badge instead of the normal save button.

Clicking on the locked badge will pop up a panel that tells the user what is going on and offers some actions:

- the user can start a chat through the messaging app with the user who started editing the document
- the user can force the document unlock

This document is currently locked for editing by Guido Stevens. If you think Guido is currently not editing this document and you want to edit it now, then you can unlock the document. Unlocking the document will allow you to edit the document and lock it for editing for other users untill you close the document.

🔒 Unlock   💬 Chat with Guido

The Federal Reserve Bank financial statements also include the accounts and results of operations of several limited liability companies (LLCs) that have been consolidated with the Federal Reserve Bank

5.7 Events

This part of the manual is about how to use and create events in an existing workspace.

Quaive has a powerful built-in system for managing and showing calendar events. Besides that, every workspace in Quaive can hold it's own event which makes it possible to keep users informed on important dates concerning their workspaces.

There is also a calendar App existing in Quaive which allows you to get an overview over all events in all workspaces that are relevant for you. .. Learn more about the calendar App here:

To access the calendar of your workspace and see which events are scheduled please click the little calendar icon in the section navigation of your workspace.
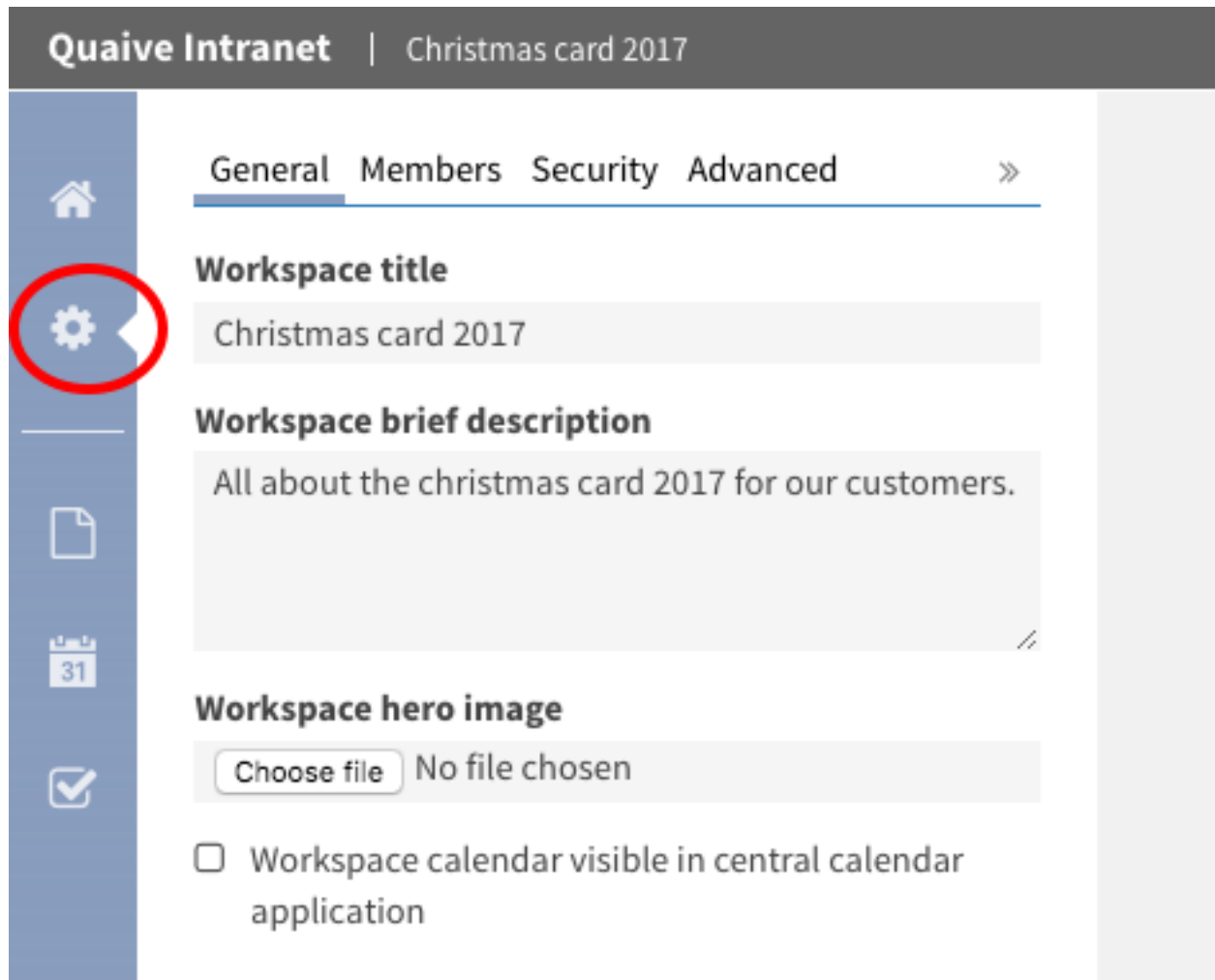
In this part of the manual you will

- *Create an event in a workspace*
- *Use the Calendar view*

5.7.1 Create an event in a workspace

To create an event in a workspace, click the plus icon in the sidebar.
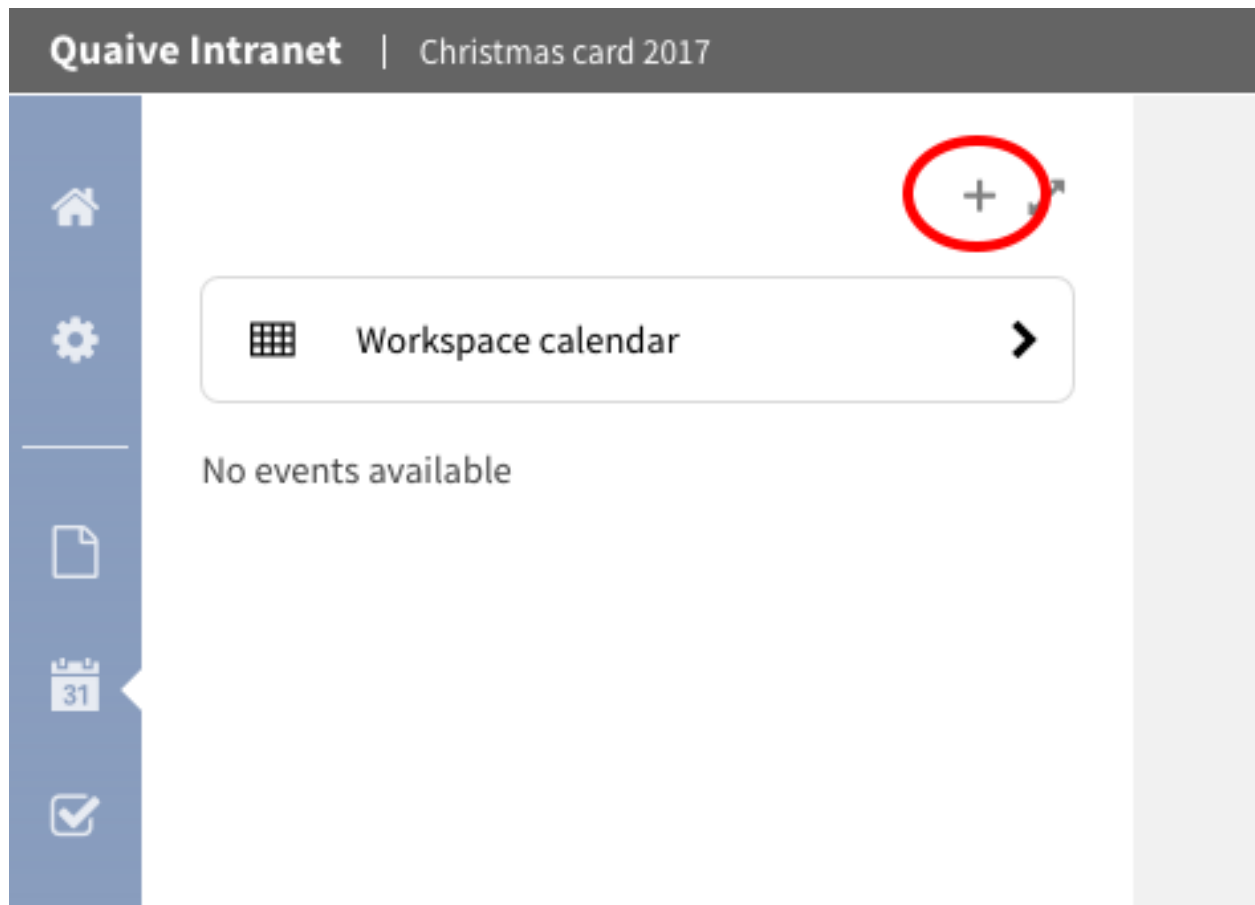
This opens the create event form.

We will take a closer look to the fields on the create events form. From the top they are:

- **Event title** (*required*): The title is displayed in all places where the event is listed - calendar, portlets, listings, …

- **Notes**: the description is also displayed in some overviews and should therefor be short

- **Location**: the location the event takes place (free text)

- **Organiser** (user picker field): the user organising the event

- **All day event**: when this is selected, the start and end time settings of the event are ignored

- **From** (*required*) (calendar field): the date and time the event starts

- **To** (*required*) (calendar field): the date and time the event ends

- **Timezone**: the time-zone for the event's start and end times

- **Invitees** (user picker field): the users that are invited to the event

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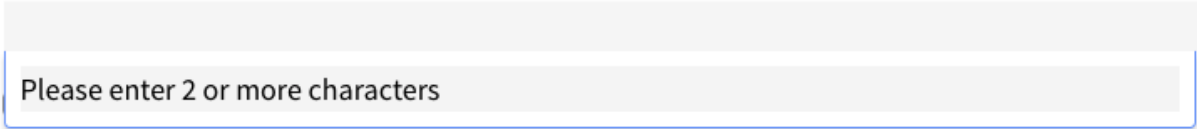
Only the title field and the start and end date and time are required. All other fields are optional and can also be left blank.

For date fields in Quaive a handy popup-calendar helps you selecting the date easily.

Quaive user picker field

For the user related fields Quaive offers a special user picker that helps you browsing the user database to find portal users and assign them:
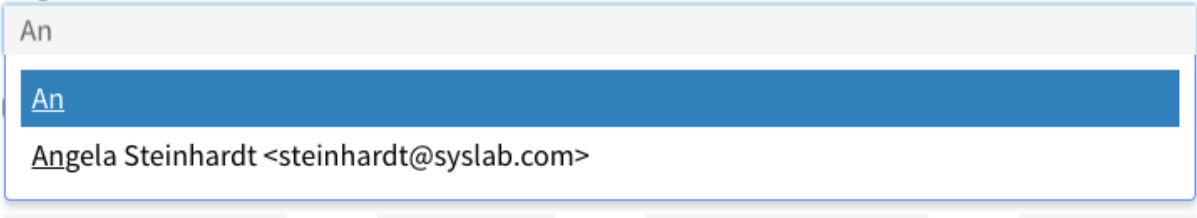
Organiser

Please enter 2 or more characters

Just enter two or more chars to search for a user within the whole Quaive portal

Organiser

An

An

Angela Steinhardt <steinhardt@syslab.com>

When selecting a user from the list of search results, the field is filled with the correct name and email address.

Organiser

⊖ 👤 Angela Steinhardt

That's how the form looks for our test event. To create the event just click the button "Create" at the bottom of the form.

Your event is now created and listed in the sidebar under "Upcoming events".

There will be a section older events which holds events of this workspace with end dates in the past. You can see that in the next chapter of this manual when we take a closer look at the workspace's *Use the Calendar view*.

5.7.2 Use the Calendar view

Besides the list of events in the sidebar Quaive offers a calendar with several view options within the workspace to get a quick overview over all events scheduled for this workspace.

To open the calendar view please click the link "Workspace calendar" at the top of the sidebar.
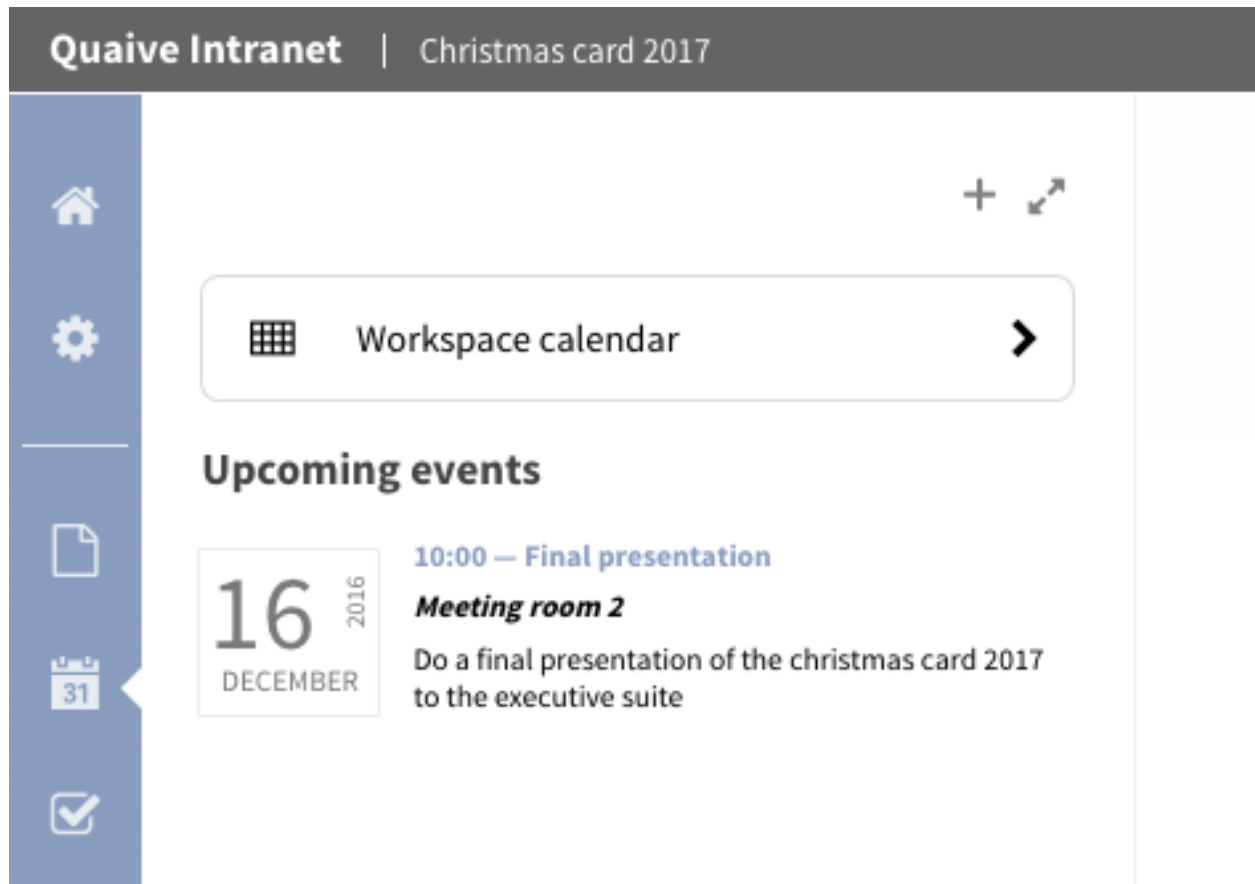
The calendar shows up with a month overview for the current month. All upcoming events and events of the last few weeks are displayed with their start time, their title and the location they are supposed to take place in brackets.

In each workspace you have also the possibility to display all events you are allowed to see that reside in other workspaces. To show them up in your current workspace's calendar view just tick the checkbox "All calendars" above the calendar grid.

This displays all events for the visible period of time. Events that do not belong to the workspace you are currently in are displayed in a transparent way to make it easy for you to see which events are from other workspaces.
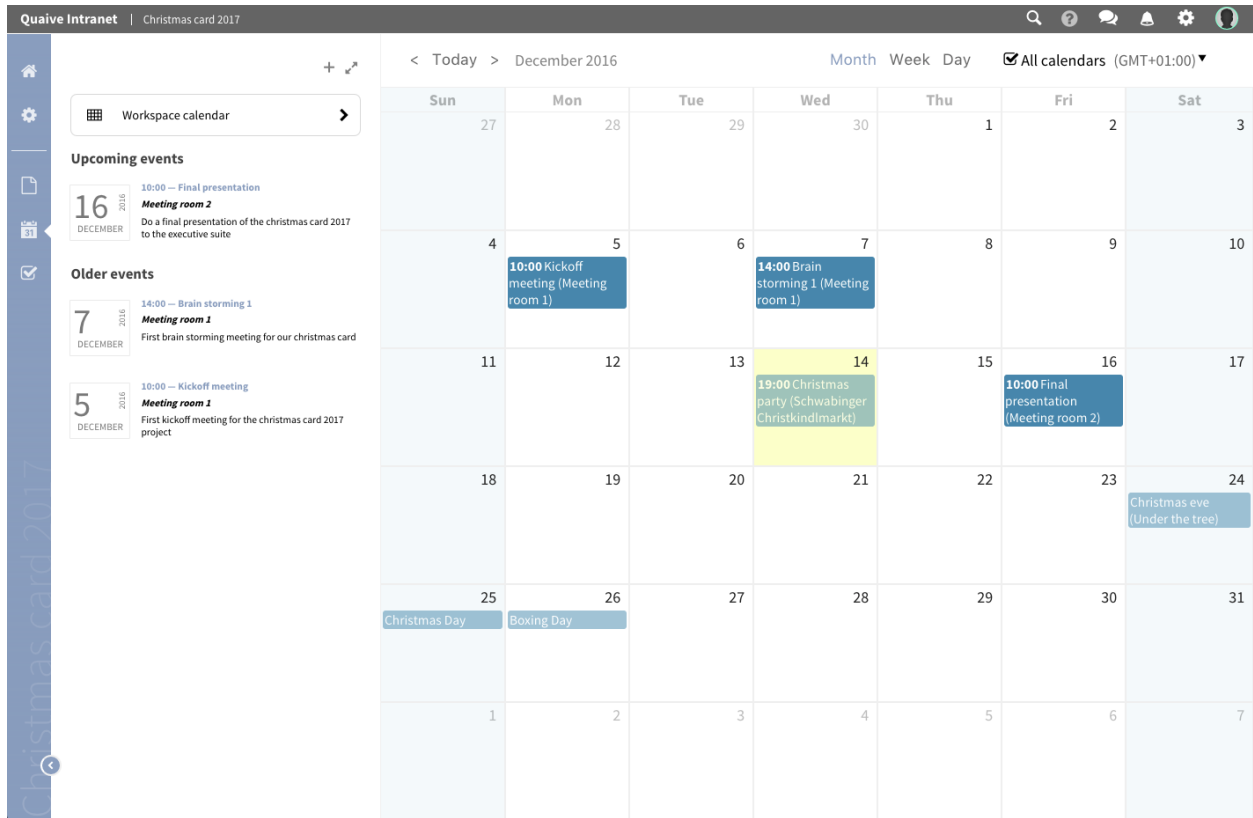
In the Quaive workspace calendar view - same as in the Quaive calendar app - you can switch between the calendar month, week or day view. Here you can see the calendar week view:
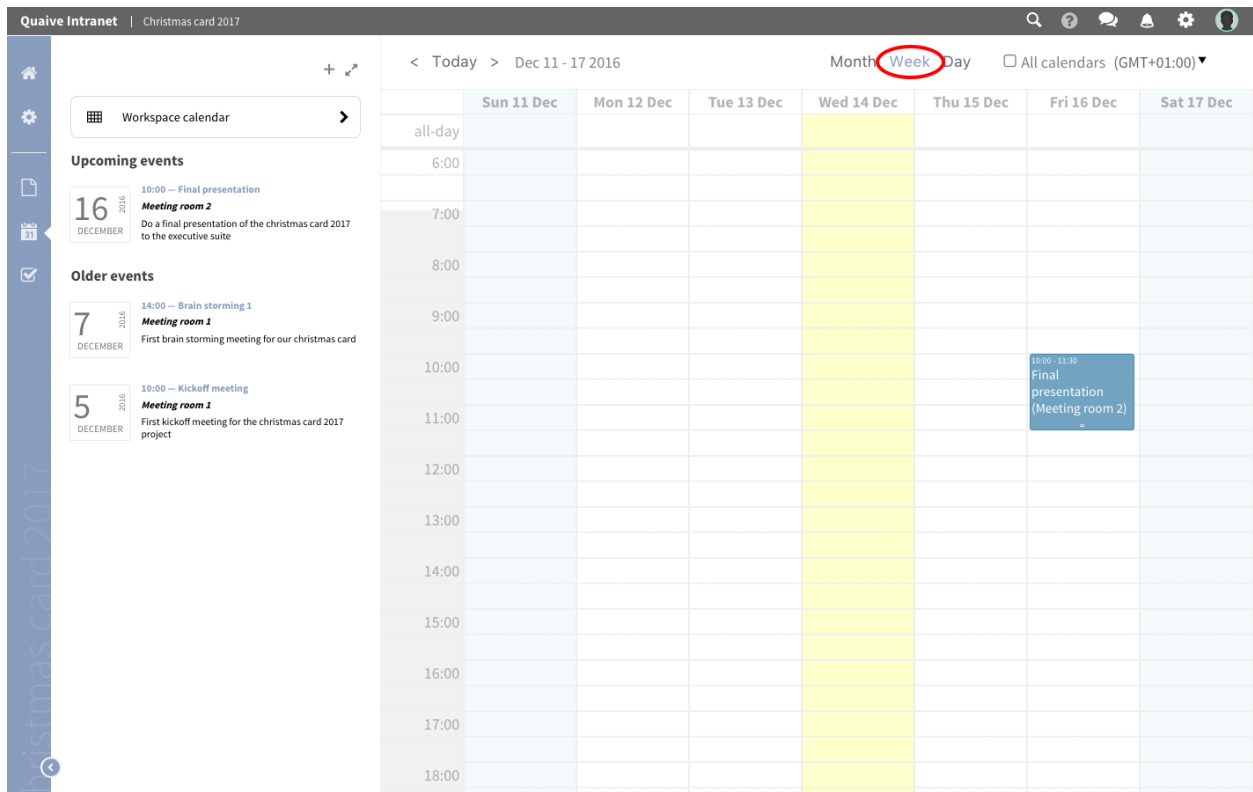
And the calendar day view:
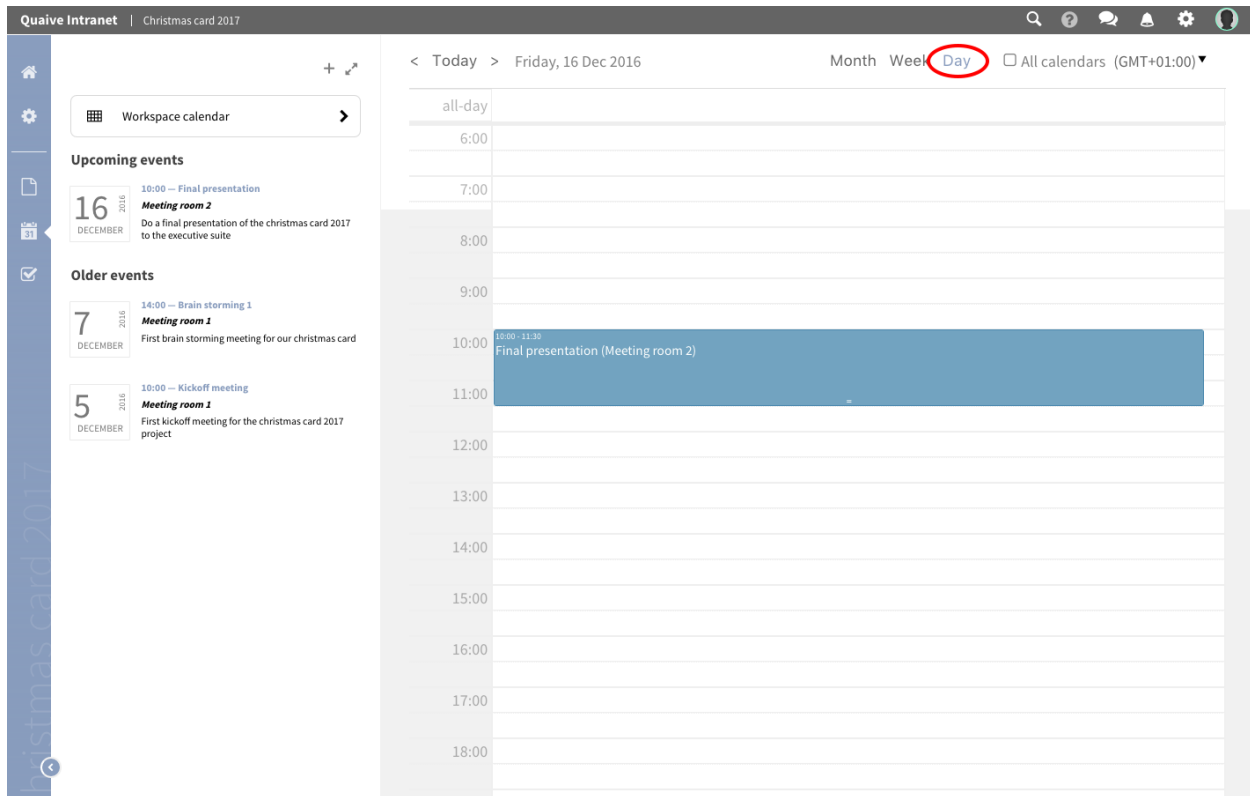
In all calendar views you can also create new events by simply clicking the tile for this day or time period. This will open a compact popup form to create your events in a quick and easy way.
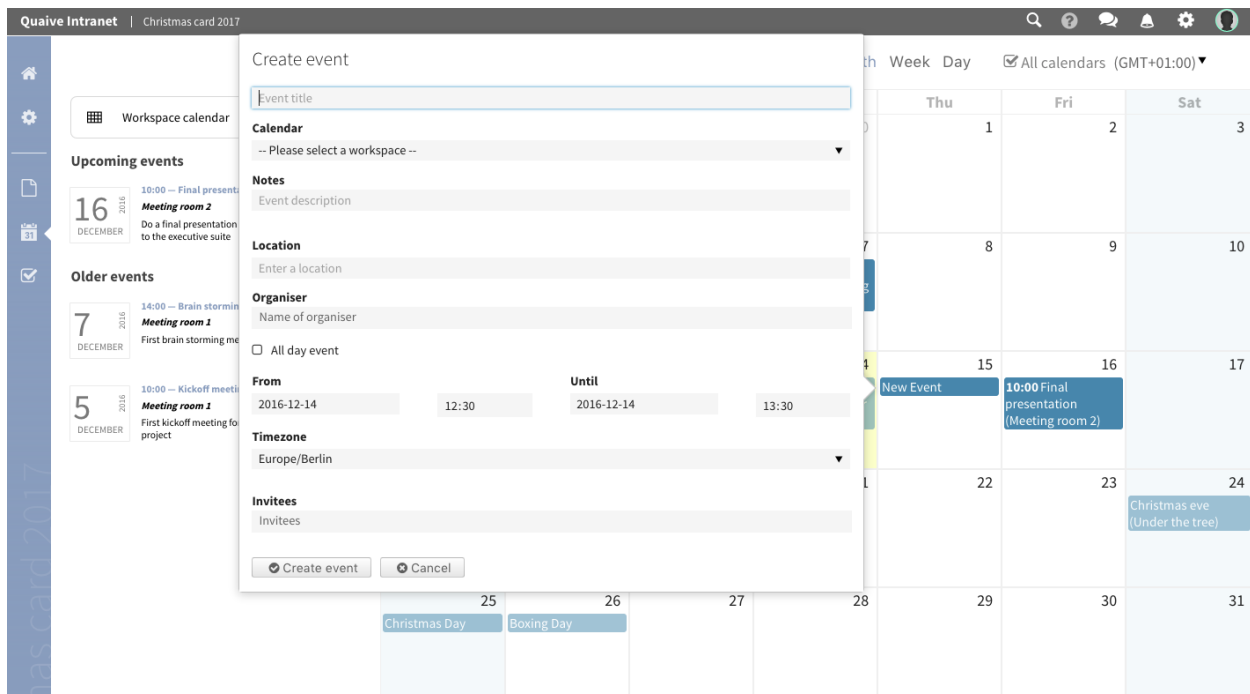
There is also an option to view the events of you local workspace's calendar in the central calendar app. To enable this you have to change the setting "Workspace calendar visible in central calendar application" in the workspace general

settings section as described here: *How to display the workspace events in the global calendar*

5.8 Tasks

This part of the manual is about how to use and create tasks in an existing workspace.

In a workspace in Quaive you can use tasks to define small pieces of work and - if you want - assign this to another user. Tasks can be closed when the job is finished and reopened again if this seems necessary. A notification email is sent out to the different users when a task was edited or it's status was changed.

To access the task section of your workspace and see existing tasks and their status click the little checkbox icon in the section navigation of your workspace.
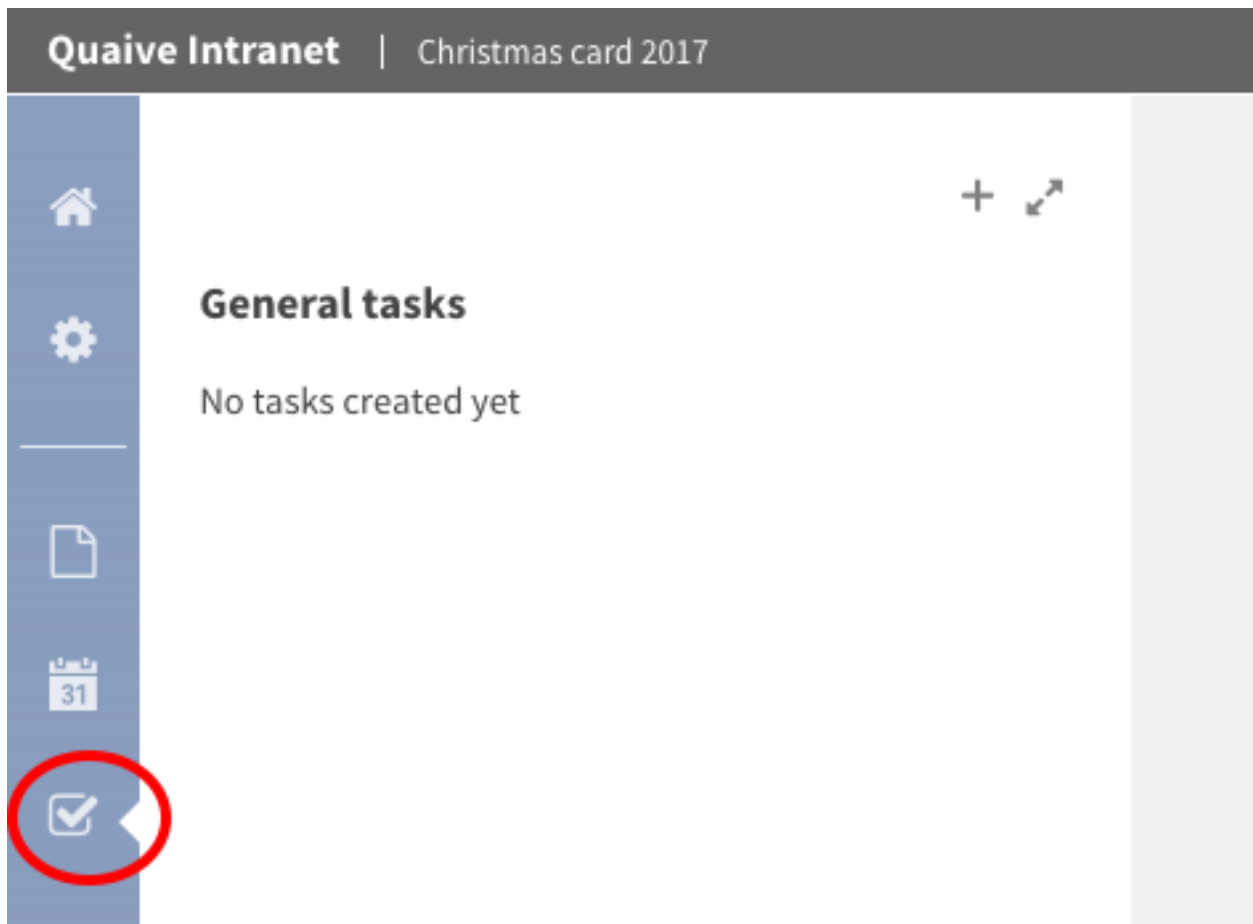
Now you will learn how to

- *Create a task in a workspace*
- *Change the status of a task*

5.8.1 Create a task in a workspace

To create a task in a workspace, click the plus icon in the sidebar.
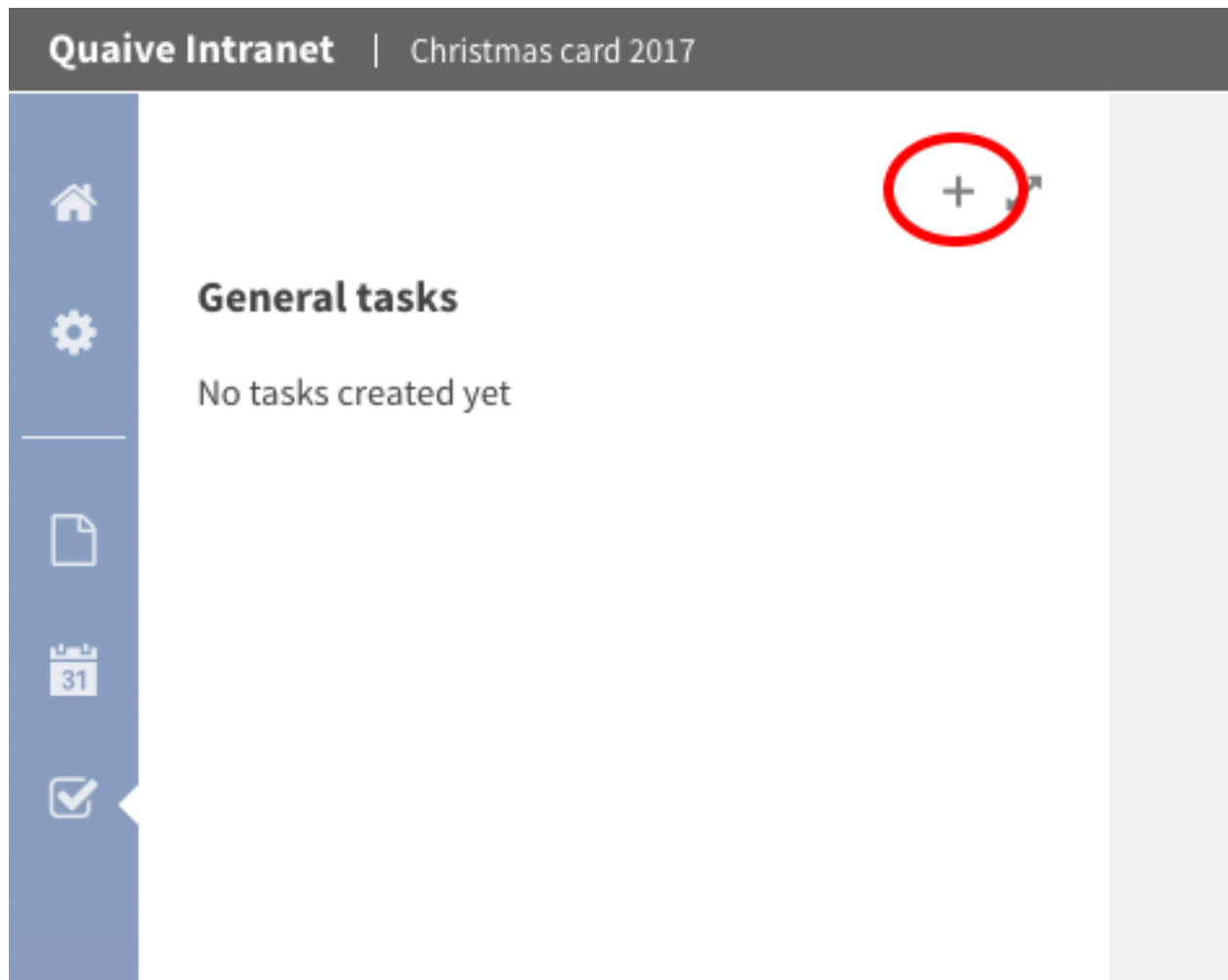
This opens the create task form.

We will take a closer look to the fields on the create task form. From the top they are:

- **Task title** (*required*): The title is displayed in all places where the task is listed - sidebar, portlets, listings, . . .

- **Description**: the description can be used to describe the task if necessary

- **Initiator** (user picker field): the user initiating the task (this field is prefilled by the user who created the task)

- **Assignee** (user picker field): the user the task is assigned to

- **Due date** (calendar field): the due date this task should be done

Only the title field is required. All other fields are optional and can also be left blank.

For date fields in Quaive a handy popup-calendar helps you selecting the date easily.

For the user related fields Quaive offers a special user picker that helps you browsing the user database to find portal users and assign them. More about the user picker field type you can read in the events section here *Quaive user picker field*

That's how the form looks for our test task. To create the task just click the button "Create" at the bottom of the form.

Your task is now created and listed in the sidebar under "General tasks".

There will be a section older events which holds events of this workspace with end dates in the past. You can see that in the next chapter of this manual when we take a closer look at the workspace's *Use the Calendar view*.
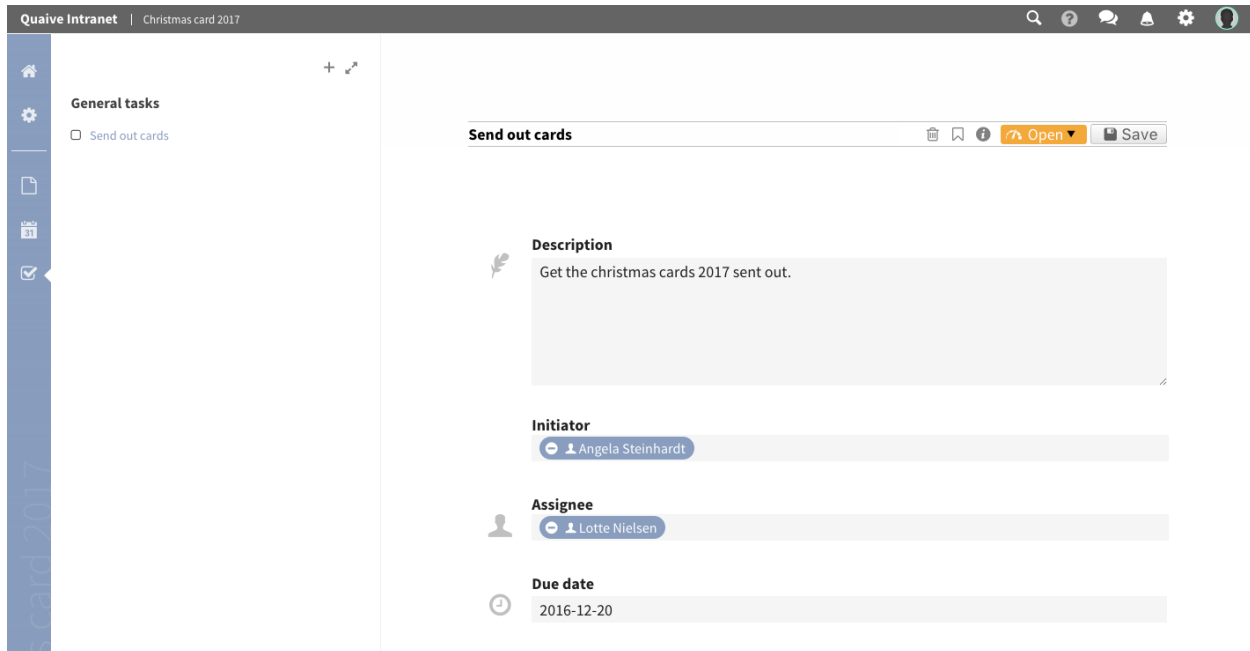
5.8.2 Change the status of a task

When you create a task in a workspace, the status of this task is open. This means, the work still has to be done, the job awaits doing.

Usually you assign a task to a specific user and then this user has the task in his task list on the dashboard to see action needs to be done. After this user - or also someone else - did the job, he may want to inform you about it and this can be done by closing the task. So a closed task tells you the work has been done.

Of course tasks can be reopened again if needed so the actions described now can also be performed to re-open a closed task. You can see the current status of all tasks in the sidebar by looking at the task's checkbox. Checked means the task is done, unchecked means it's still open.
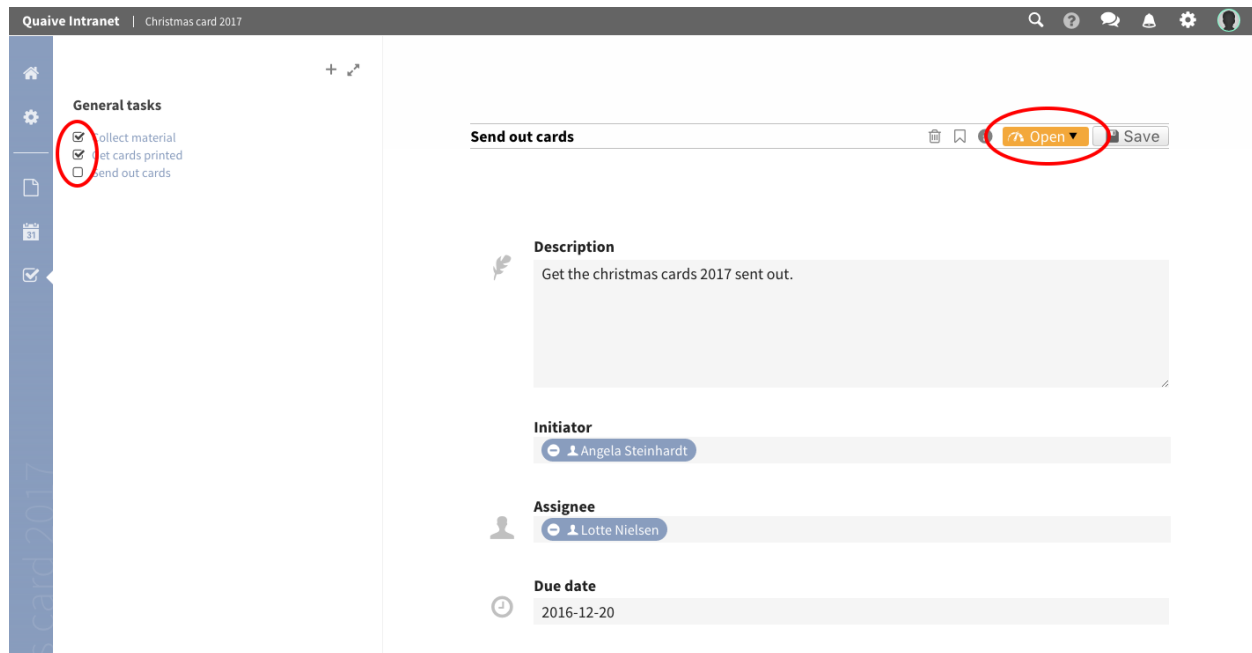
To close our newly created task we click on the task title in the sidebar to open the task's edit view. In the edit actions bar you can see the current status of the task. For our task, the status is "Open" - you can also see this in the sidebar.

To change the status of the task open the status pulldown and select "Done".

A spinner shows that the status of the task is changed immediately and also the sidebar is updated automatically - the checkbox in front of the task is checked now. You can also use the sidebar checkboxes to close or re-open a task by simply checking or unchecking it's checkbox.
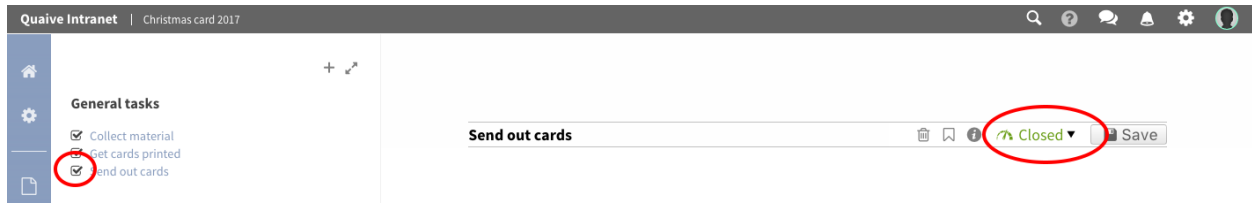
5.9 Case Workspaces

Case workspaces are a special type of workspace which help teams to manage a shared work load with discreet milestones. You can configure a case workspace with a set of tasks and milestones and then re-use that configuration for new projects. You can also decide who is able to work on particular tasks during each milestone and notify workspace members when a particular milestone has been reached.

Let's step through the process of creating and using a case workspace.
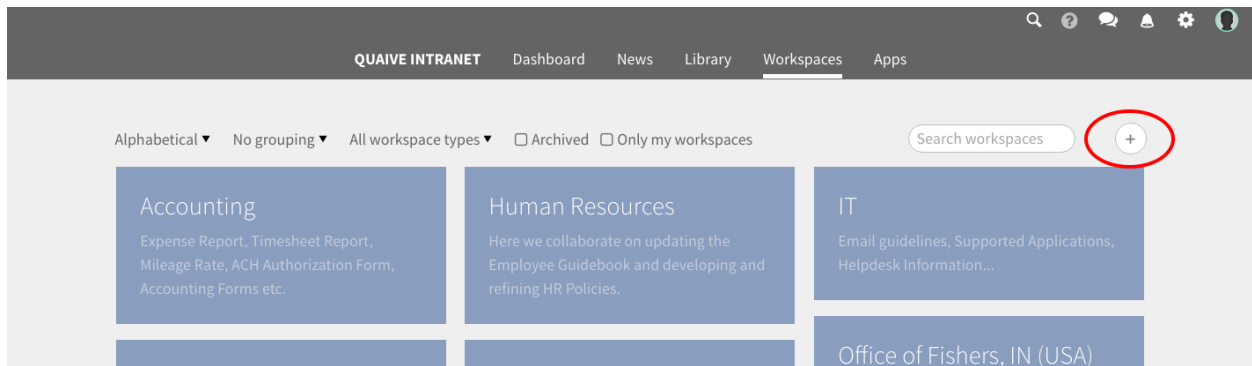
Select "Case Template" as the workspace type.

Note: Your Quaive site may have a selection of different pre-configured case workspaces available under the 'Special workspace' section.

Fill in the details and create the workspace.
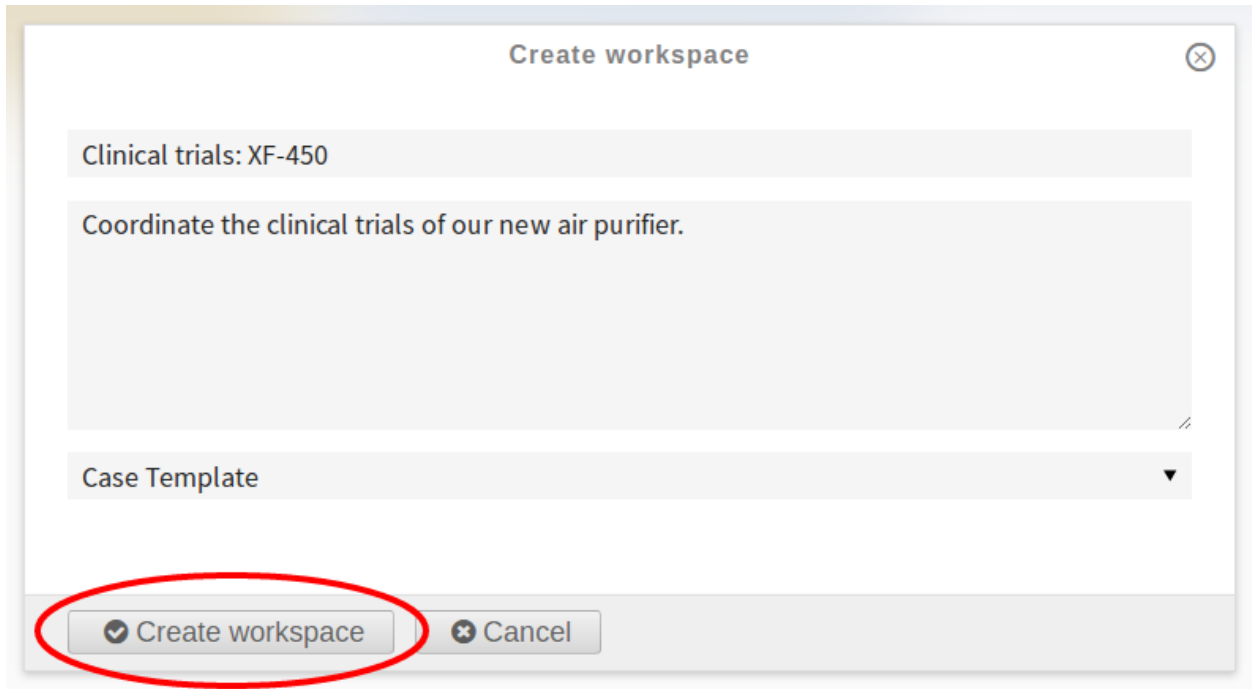
On the case workspace you will see an overview of the tasks and milestones for this case workspace.
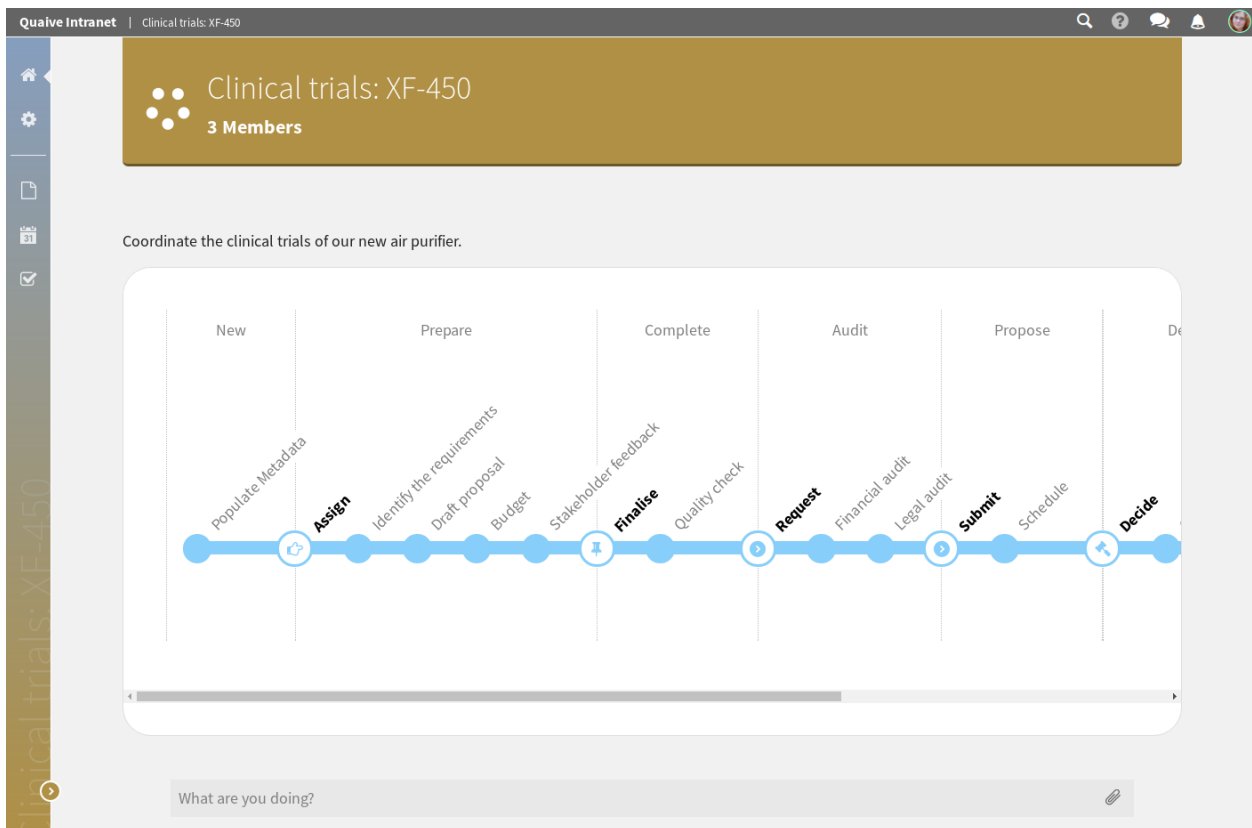
Please click on the tasks icon in the sidebar to configure additional tasks.

Let's create a new task to add members to the case workspace. Please click the button to add a new task to the "New" milestone.
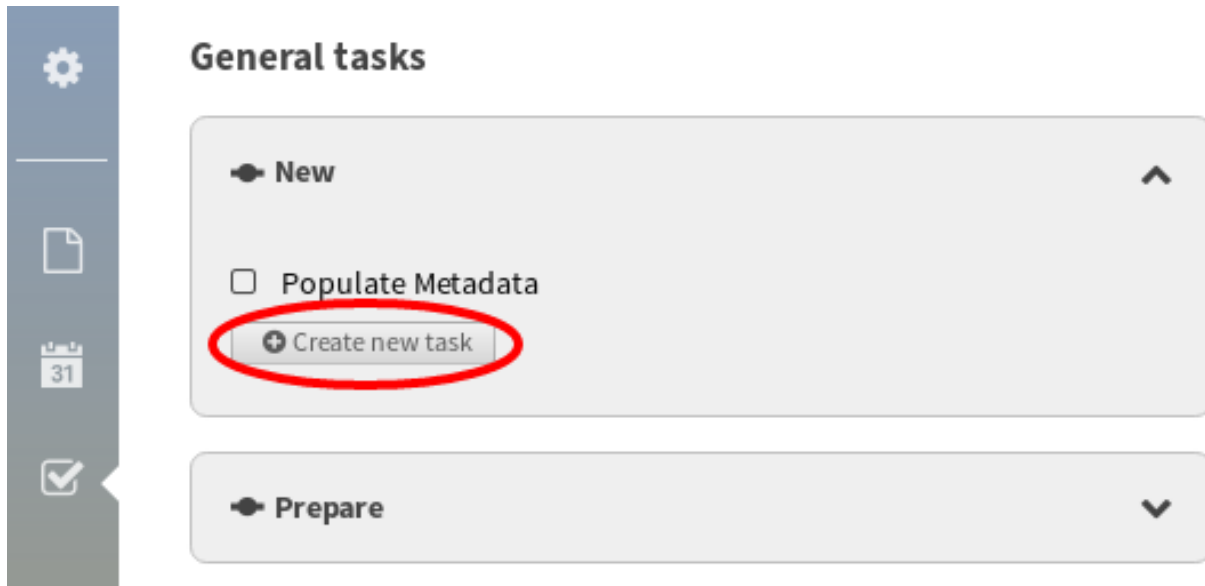
You can add an assignee and a due date.

You will also see the assignee and due date on the case workspace.
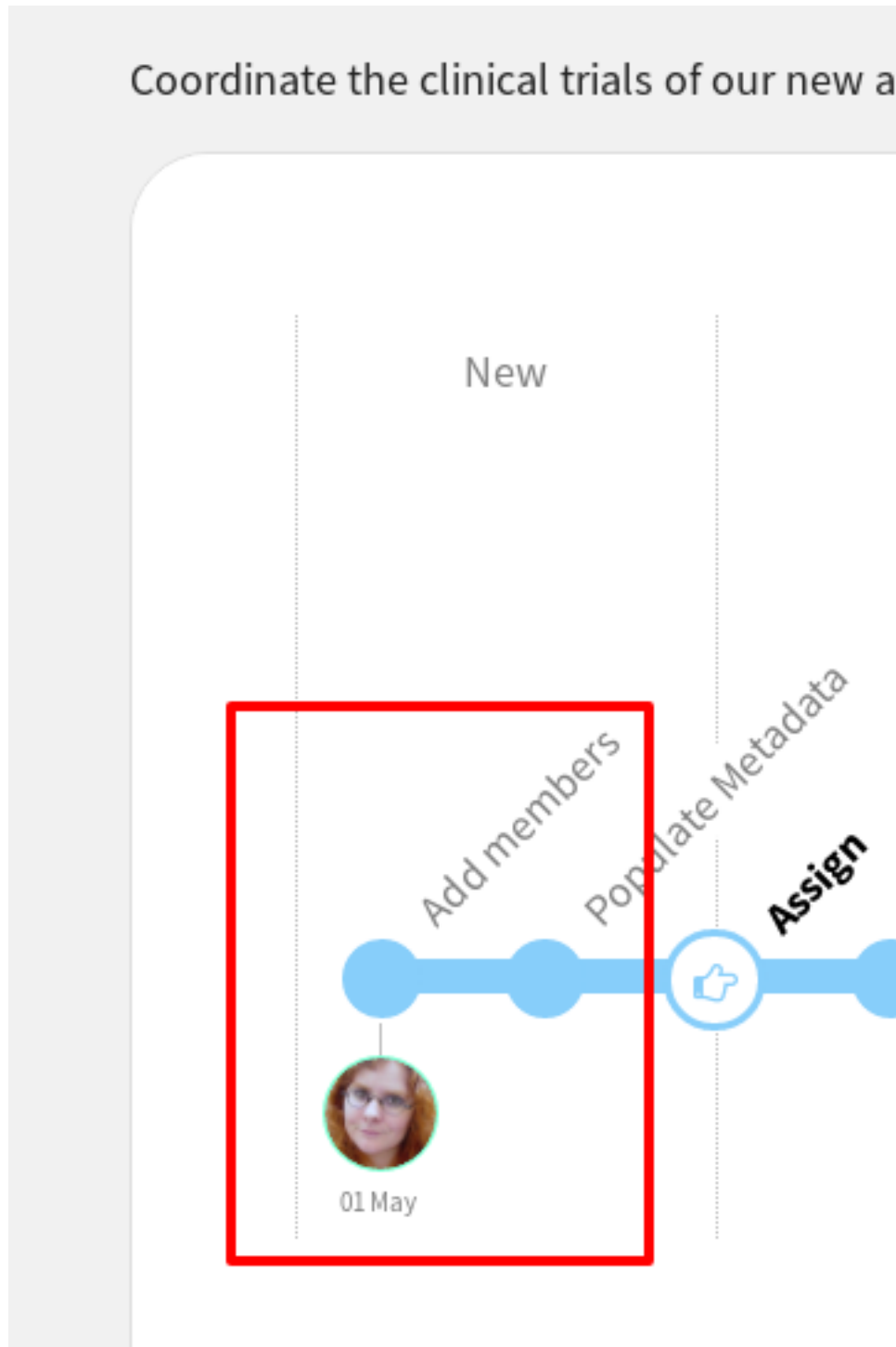
You can now add complete the task by adding a team member. This works in exactly the same way as a normal workspace, using the *Members* settings.

There are two ways to mark a task as complete.
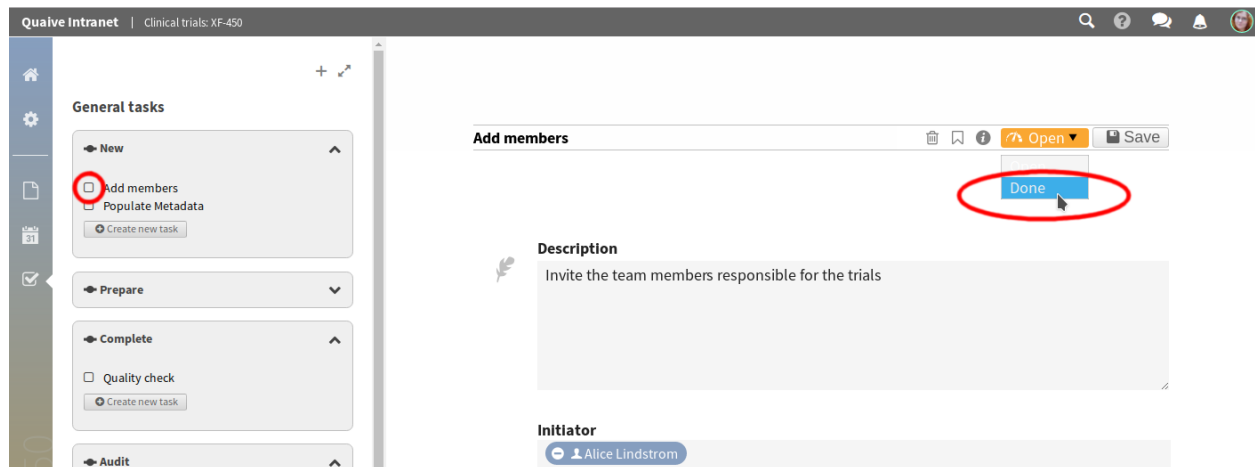
You can now see that the task is complete.
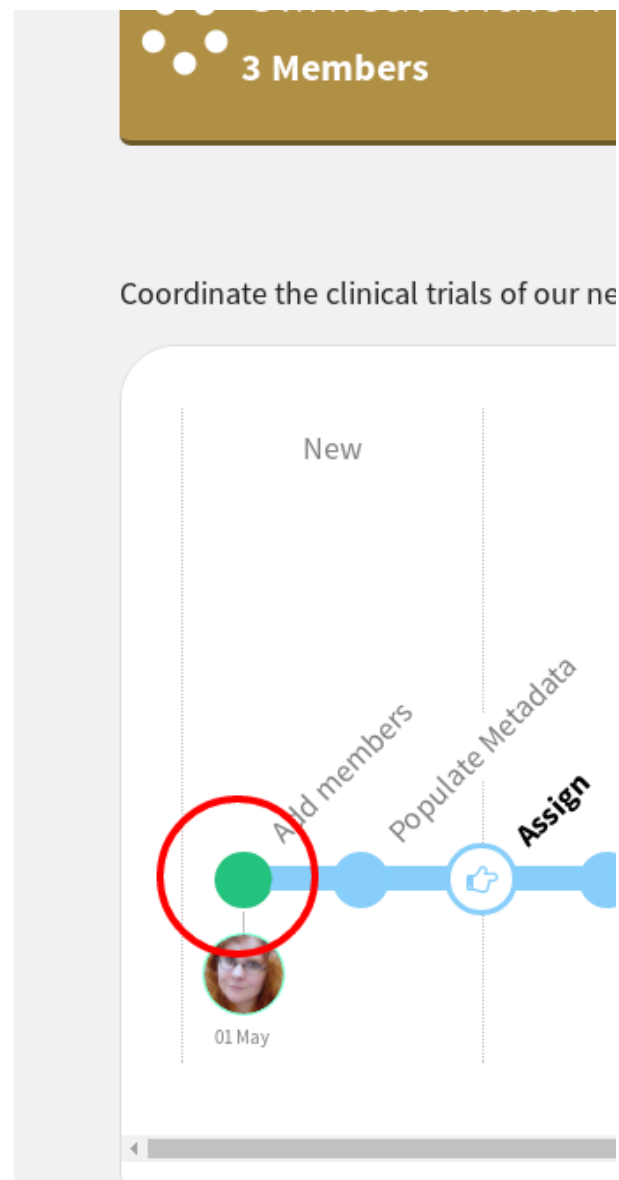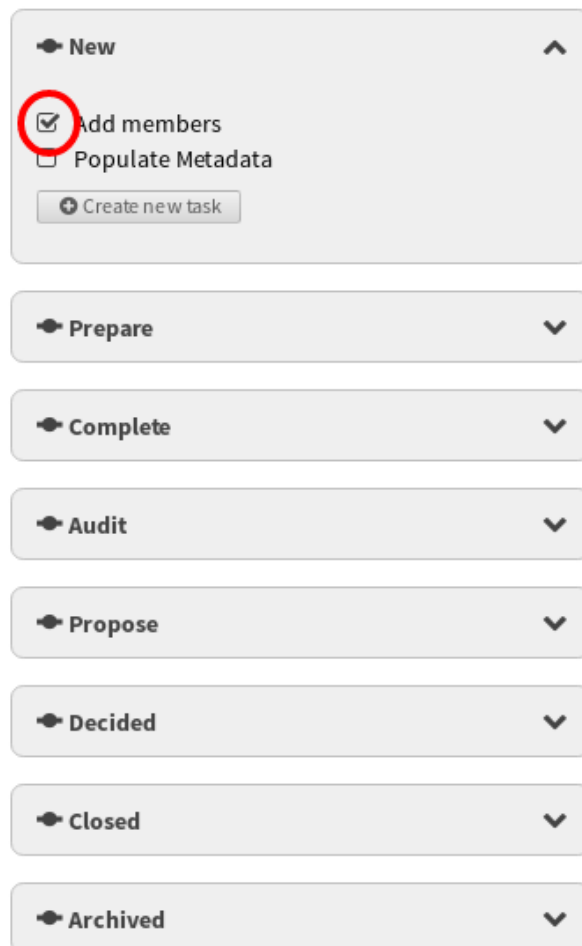
Once all the tasks for a milestone are complete, you can close the milestone and move on to the next one.

You can now see that the milestone is closed, you can also reopen it from the task sidebar.

General tasks

New

☑ Add members
☑ Populate Metadata

⊕ Create new task   ⬅ Reopen milestone

Prepare

☐ Identify the requirements
☐ Draft proposal
☐ Budget
☐ Stakeholder feedback

⊕ Create new task

Complete

Audit

Propose

Decided

3 Members

Coordinate the clinical trials of our n

New

Add members   Populate Metadata   Assign

01 May
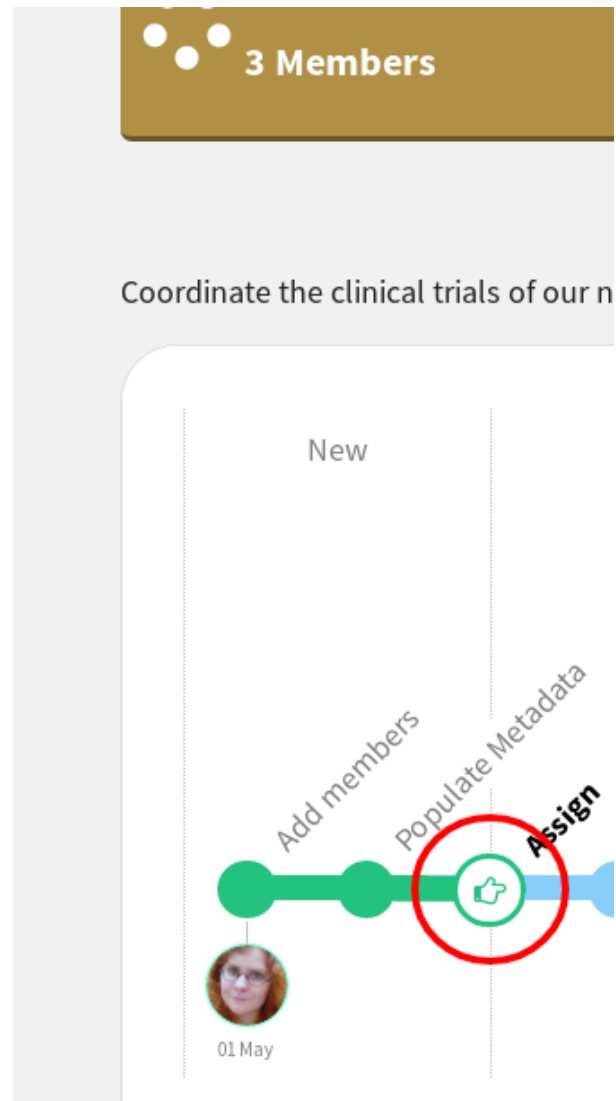
Apps

New in version 1.1.

Additional functionality for your Quaive site is available in the Apps tab.
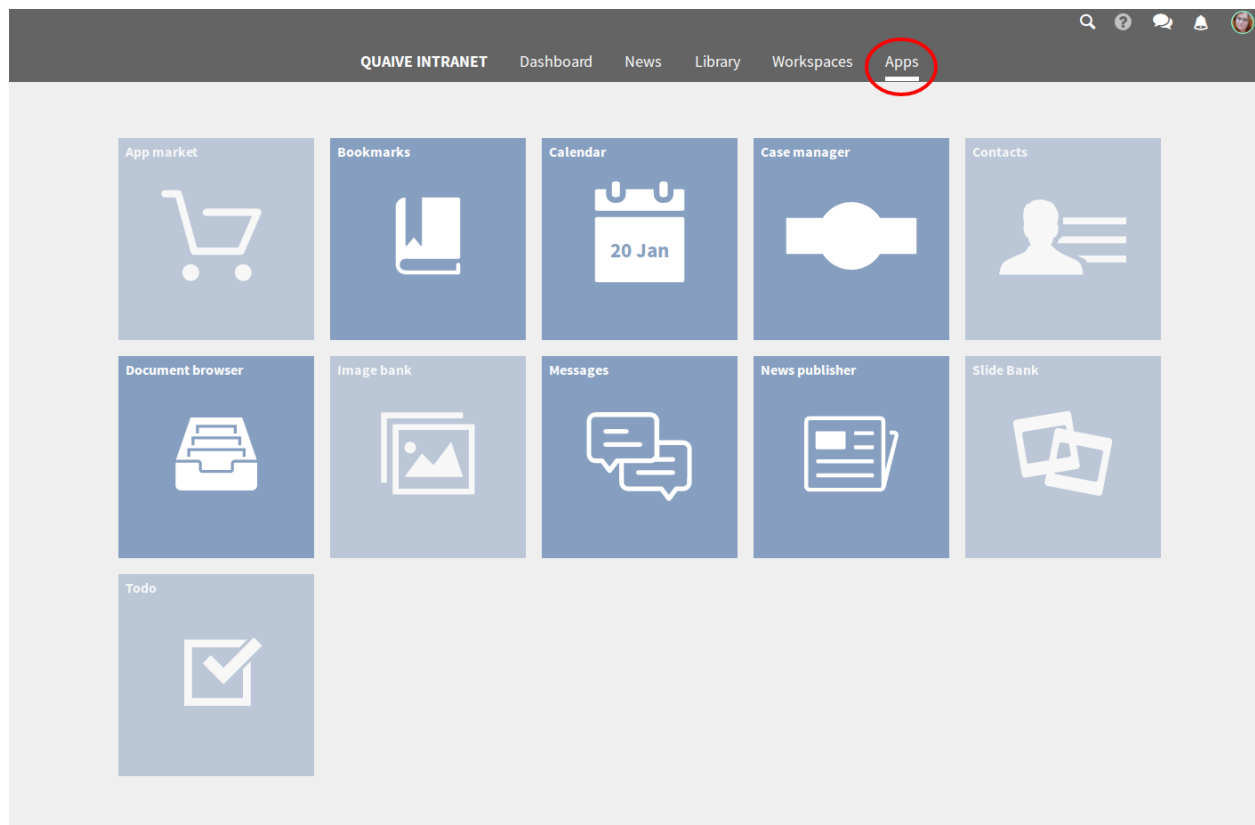
6.1 Administrator tool

New in version 1.2.

The applications eases the life of the site administrators.

6.1.1 User management

A fully featured user listing view, providing a search and sorting options, allows the administrator to have full control on its site users.

The users can be sorted:

- Alphabetically
- By their state
- By creation date
- By login date

Through this application it is possible to add a new user and control their state.

6.1.2 Screenshots

The app landing page
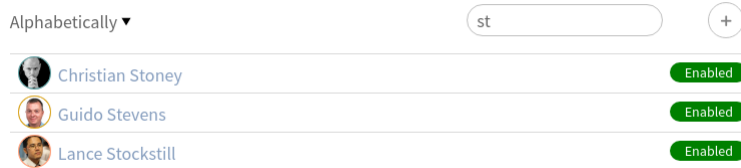
Fig. 6.1: The app landing page
It shows all the users sorted alphabetically and with the possibility to search for users. If you have lots of users do not worry! The users are paginated and will load automatically as you scroll the page.

The users sorted by their account status
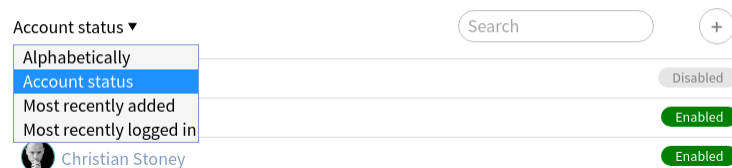
Fig. 6.2: The users sorted by their account status
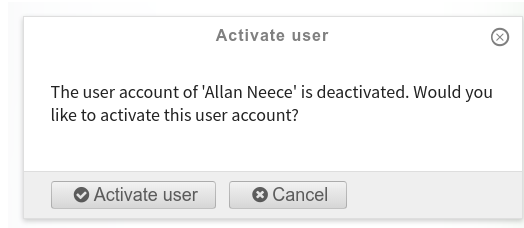
Fig. 6.3: The activate/deactivate user confirmation panel

On each row of the user listing there is a badge showing the user status. By clicking on it you will be redirected to a panel asking you to confirm if you want to toggle the user state.

The activate/deactivate user confirmation panel

The create user panel
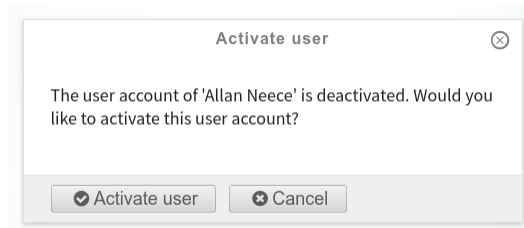
Fig. 6.4: The create user panel

By clicking the plus icon in the app landing page it is possible to add a new user. The user will receive an email (be sure your mail setting in the Plone control panel are ok) with a link to reset his password.

6.1.3 How can I?

How can I delete a user?

Deleting a user is discouraged in Quaive, because this could break the "social" aspect of the intranet. Any content that a user has created is suddenly without a connection to the creator. That is why in the Administrator Tool, you can only disable a user to prevent further logging in.

However, there might be a reason to really delete a users, e.g. if you created a duplicate account. This is possible in the CMS https://cms{[}yourname{]}.quaivecloud.com/profiles/folder_contents.

In the root, click on "Contents", then on Profiles. This takes you here: https://cms{[}yourname{]}.quaivecloud.com/profiles/folder_contents.

Locate the duplicate profile: just hover over the link to see the URL. Tick the duplicate one, press Delete. Warning: for a new user who has not created any content yet, this should be no problem. But deleting a user this way who has created content already will lead to broken links.

6.2 Bookmarks

New in version 1.2.

The bookmark app takes care of providing the best way to find the documents you care about.

The app provides you convenient groupings for your bookmarks:

- by first letter (the default one)

- by workspace

- by document creation date

- by bookmarking date

Your bookmarking experience is enhanced by the tabs that provide alternatives views that focus on subsets of documents.

We currently have the following:

- All bookmarks (the default one)

- Apps

- Workspaces

- People

- Documents

Convenients tiles are provided for your dashboard. You can have bookmark tiles:

- For all your bookmarked documents (the tile provides a search filter and a most popular bookmarks tab)

- For all your bookmarked workspaces

- For all your bookmarked apps

6.2.1 Screenshots

The app landing page
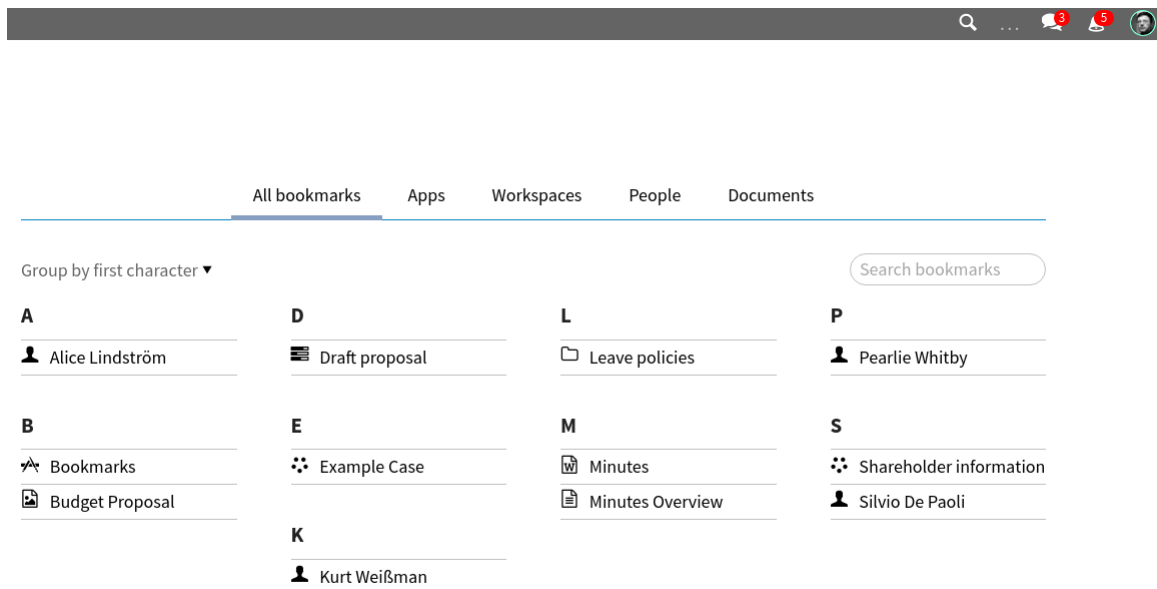
Fig. 6.5: The app landing page
It shows all the bookmarks sorted alphabetically and grouped first letter

The bookmarks grouped by workspace
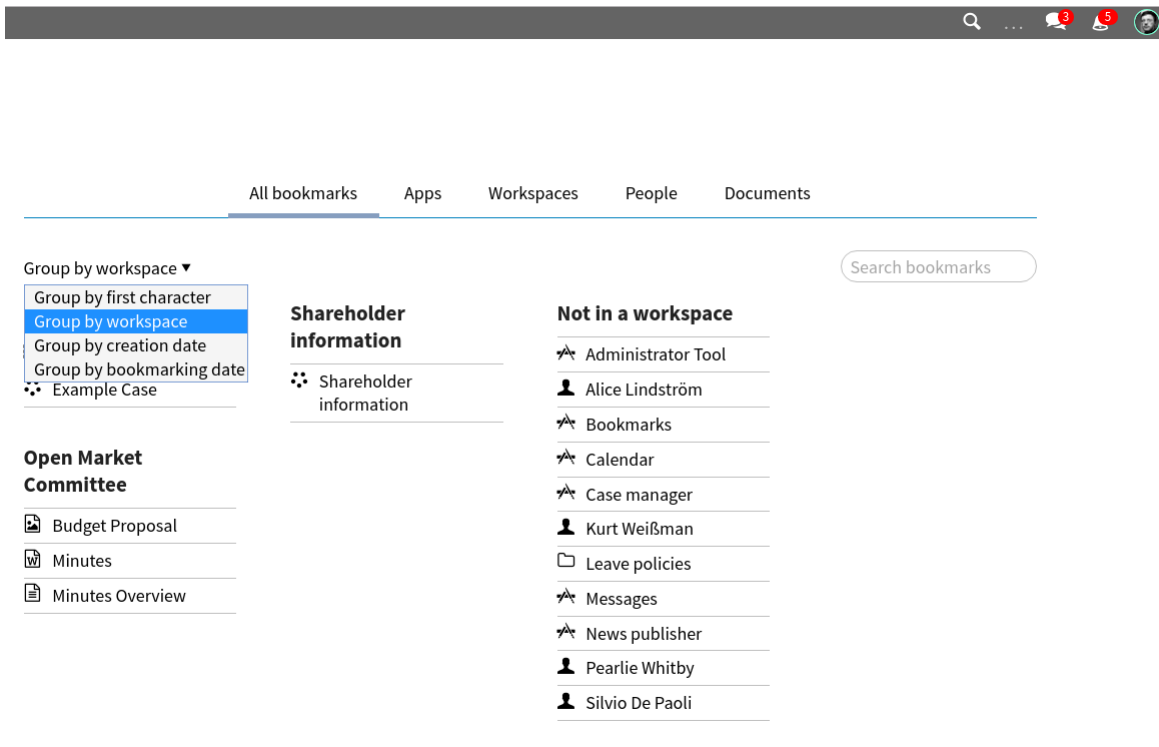
Fig. 6.6: The bookmarks grouped by workspace
It shows all the bookmarks grouped by workspace

The Workspaces alternative view

The Apps alternative view

The People alternative view

The Documents alternative view

The available bookmark tiles

6.3 Calendar

New in version 1.2.

The calendar app takes is the best way to have full control over your site events.
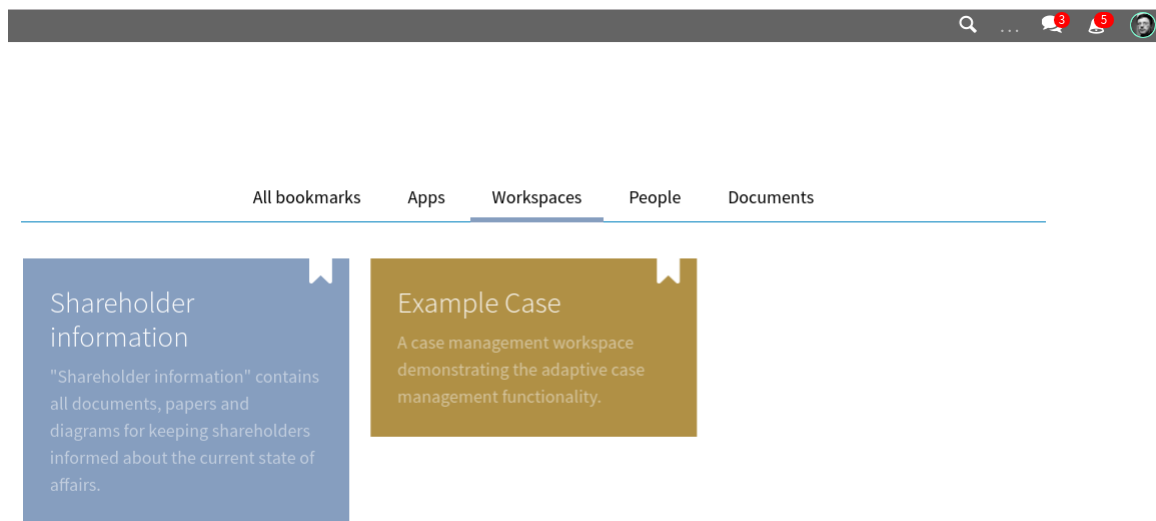
Fig. 6.7: The Workspaces alternative view
It shows all your bookmarked workspaces
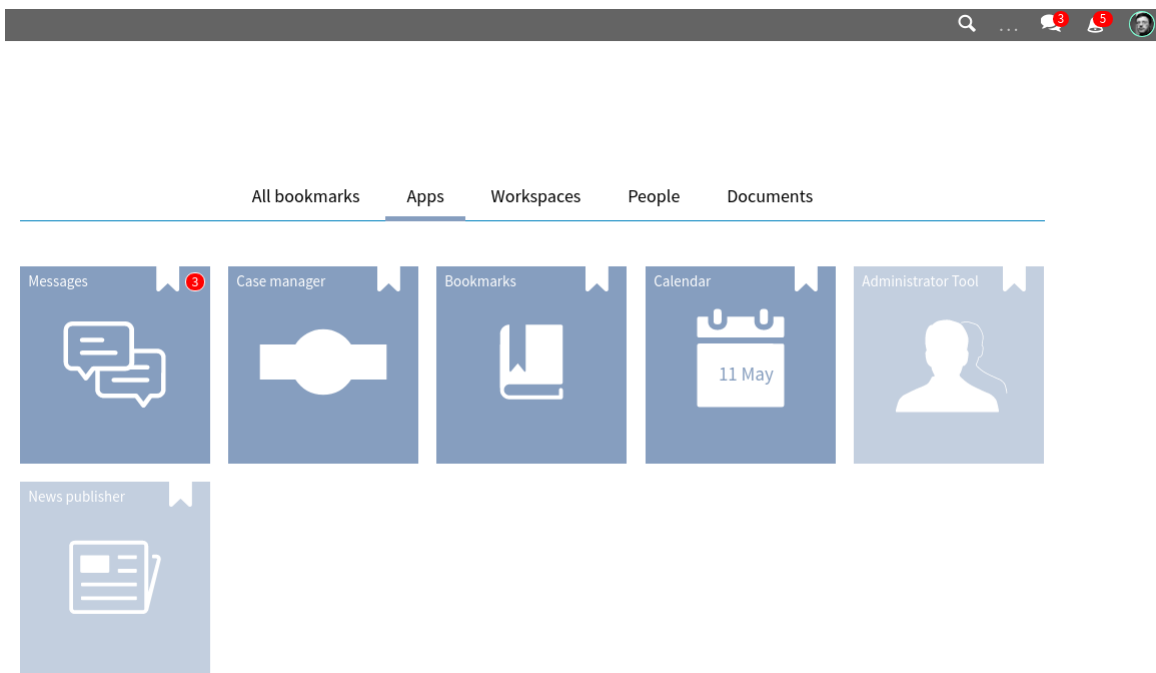
Fig. 6.8: The Apps alternative view
It shows all your bookmarked apps
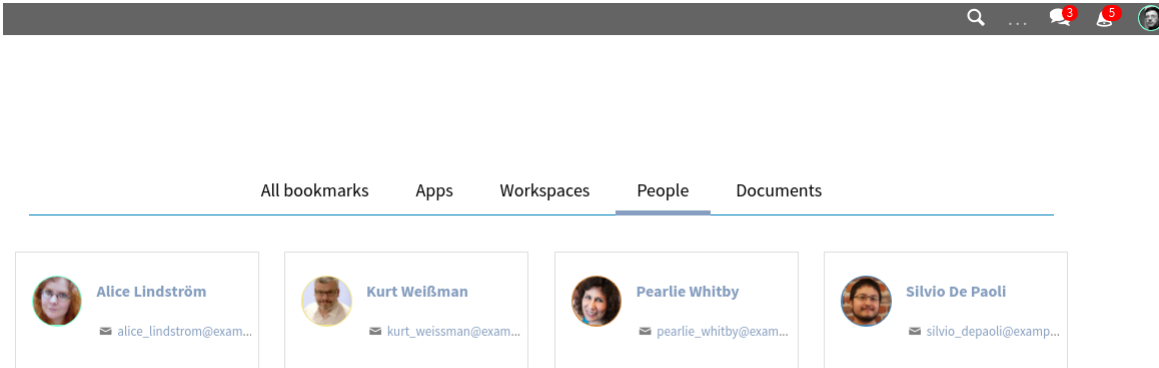
Fig. 6.9: The People alternative view

It shows all your bookmarked people
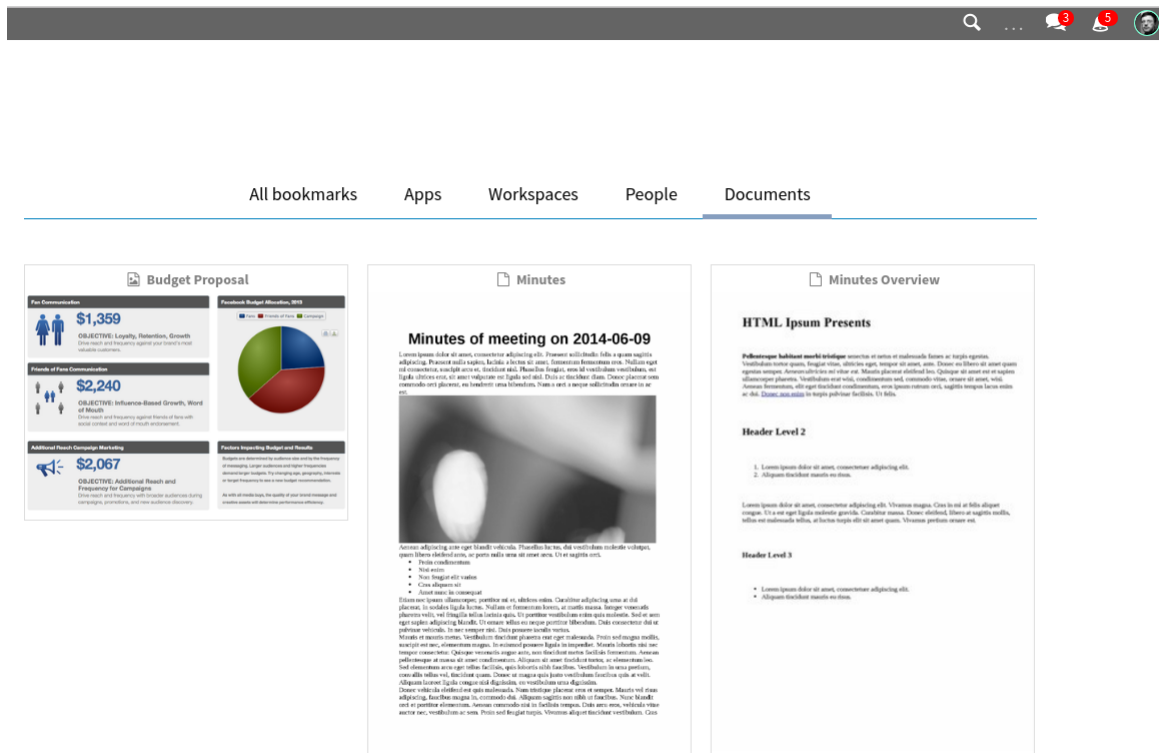
Fig. 6.10: The Documents alternative view

It shows all your bookmarked documents
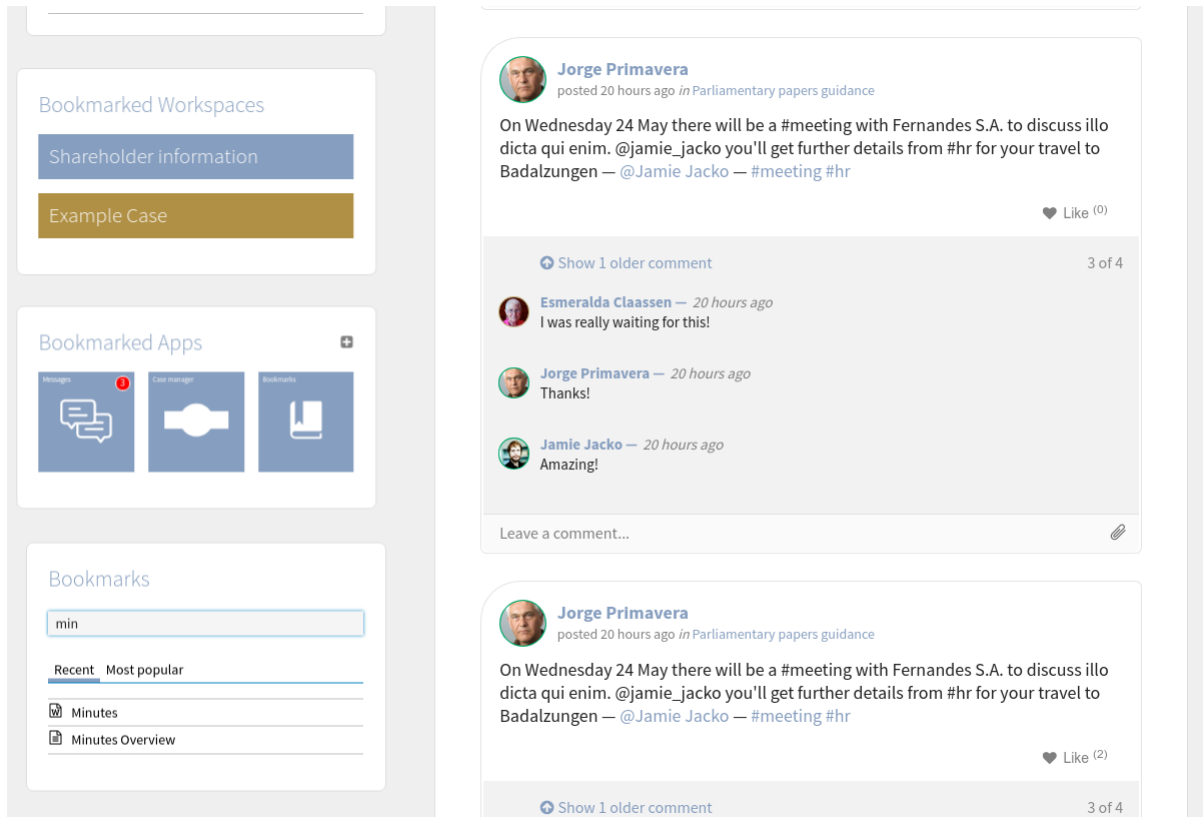
Fig. 6.11: The available bookmark tiles
They are an amazing shortcut to your favourite content.
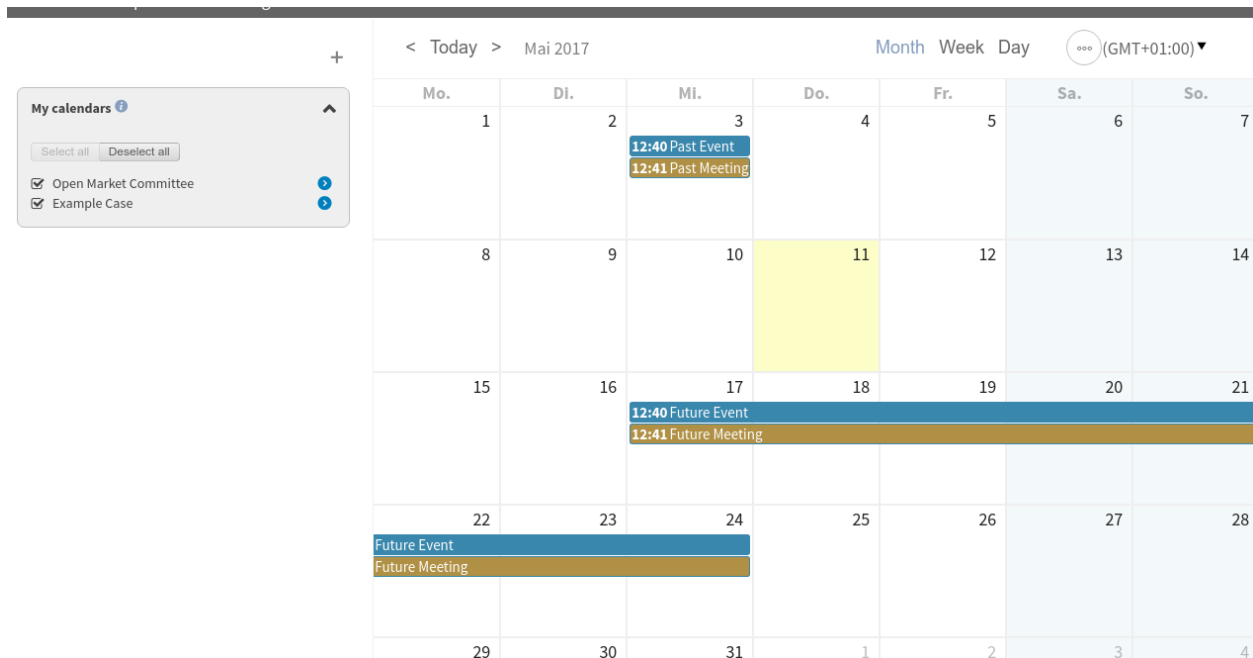
Fig. 6.12: The calendar month view
It shows all the events for this month, but you can navigate through the months. You can switch also to Week and day views.
Clicking on the calendar will allow you to add new events.

6.3.1 Screenshots

The app landing page

6.4 Case Manager

New in version 1.1.

The case manager app makes it easy to see the status of case workspaces. You can search for case workspaces by a number of parameters and you can also include archived workspaces in the results
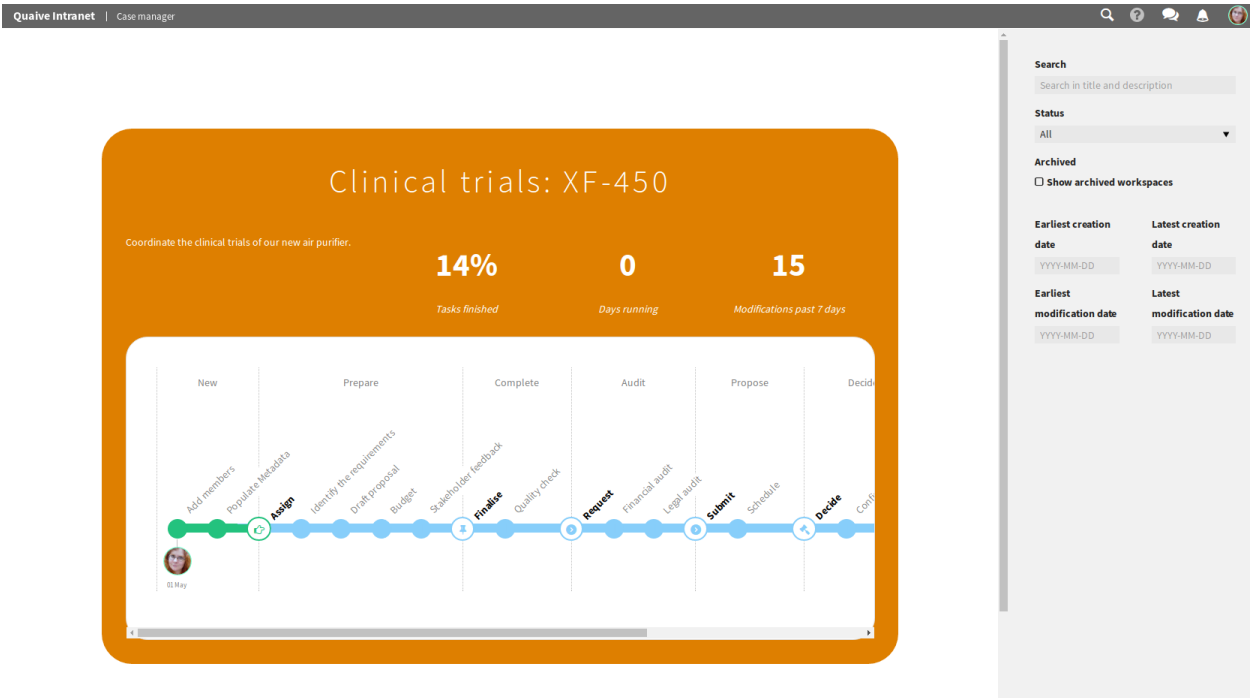
6.5 Messages

New in version 1.2.

6.6 News publisher

New in version 1.2.

Check http://localhost:8000/en/news.html#news-publisher

6.7 Todo

New in version 1.2.

The todo app that allows you to find, create and handle all of your tasks or todo items from a central location.

6.7.1 Sections of the application

The application always starts with a list of tasks. Once you click on a task to view or edit it, the task list will reduce to a sidebar and the task is shown on the right. The task list can always be restored to its full view again, by clicking on the arrows in the sidebar.

The todo comprises of three main parts:

1. All tasks

2. My tasks

3. Personal task list
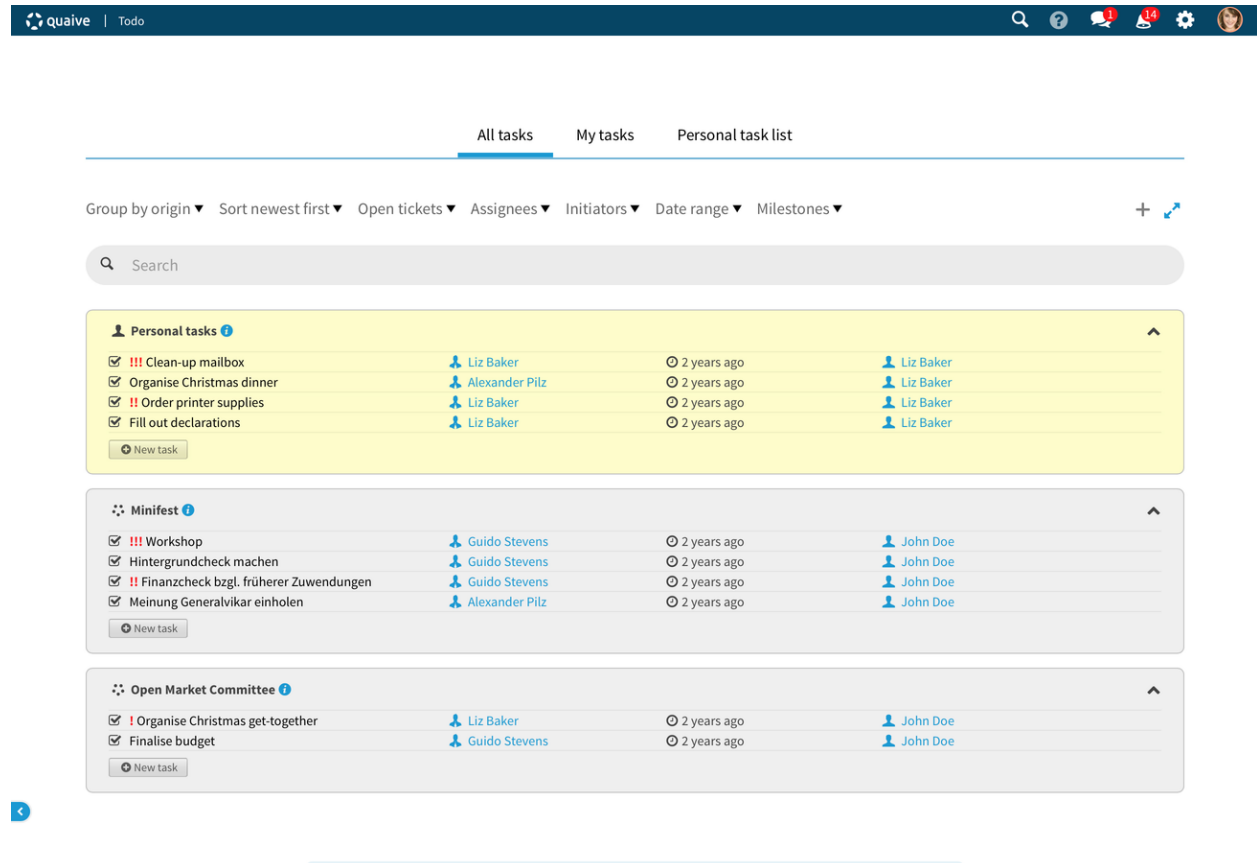
All tasks

In the all tasks section you may find any task that you created, that is assigned to you or that you have view and/or editing rights on.

My tasks
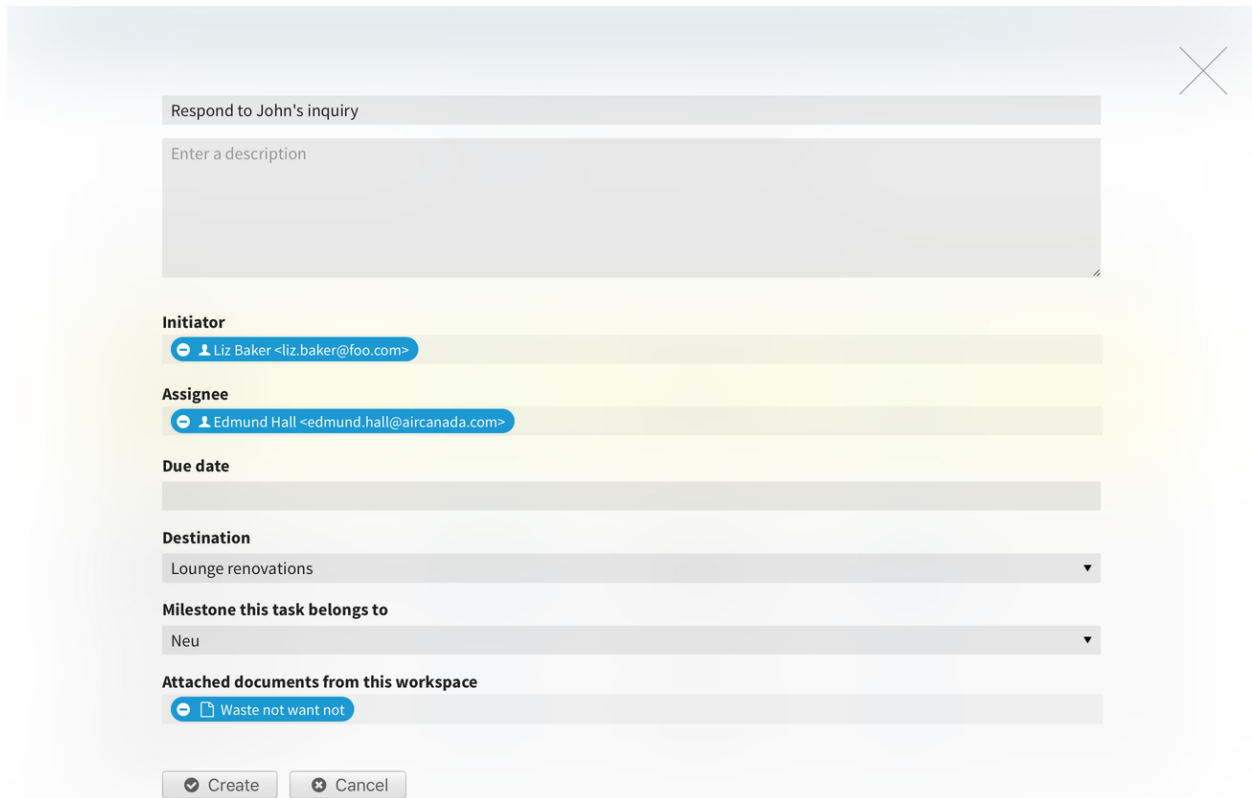
My tasks aggregates only tasks that are assigned to you. Either by yourself, or by others.

Personal task list

The personal task list show tickets that are created through the Todo app, which do not live in a Workspace.

6.7.2 Create tasks

You can created tasks by clicking on the button marked with a plus. On the screen that follows, you can enter details about the task, including a title for the task, a longer description about the task, the assignee and the due date.

It's also noteworthy that you can select the destination of the task. By default, tasks end up on your personal task list. But you can also select a workspace in which the task will be created.

6.7.3 Groupings and filters

You may choose a certain grouping for your tasks that fits your way of working best. If you're monitoring a programme of different projects, it might convenient to group by origin (default). Other grouping methods include: by assignee, initiator, task state (open/closed), priority or no grouping at all.
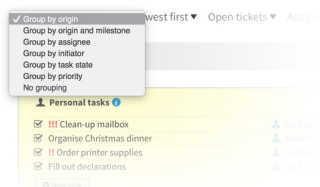
Besides grouping, it is also possible to change the order in which the tasks are sorted or reduce the items on the list by using any of the filters above the search bar.

Sorting and filters are hidden in the sidebar view and only available in the full list view.

6.7.4 Find tasks

All tasks on the entire intranet that you have view or edit rights on can be found through the search feature. Just type in a few letters of the title or description of the task you are looking for and it will appear in the list underneath the search box.

Search, filters and groupings can be combined.

You may reset both the search results and the filters by clicking on the button that reads "Reset search and filters".

Search

New in version 1.0.

The search is the tool of choice if you know what you are looking for but not exactly where to find it.

7.1 Using the search icon

Among the icons in the top right corner you will find the search icon (a magnifying glass).
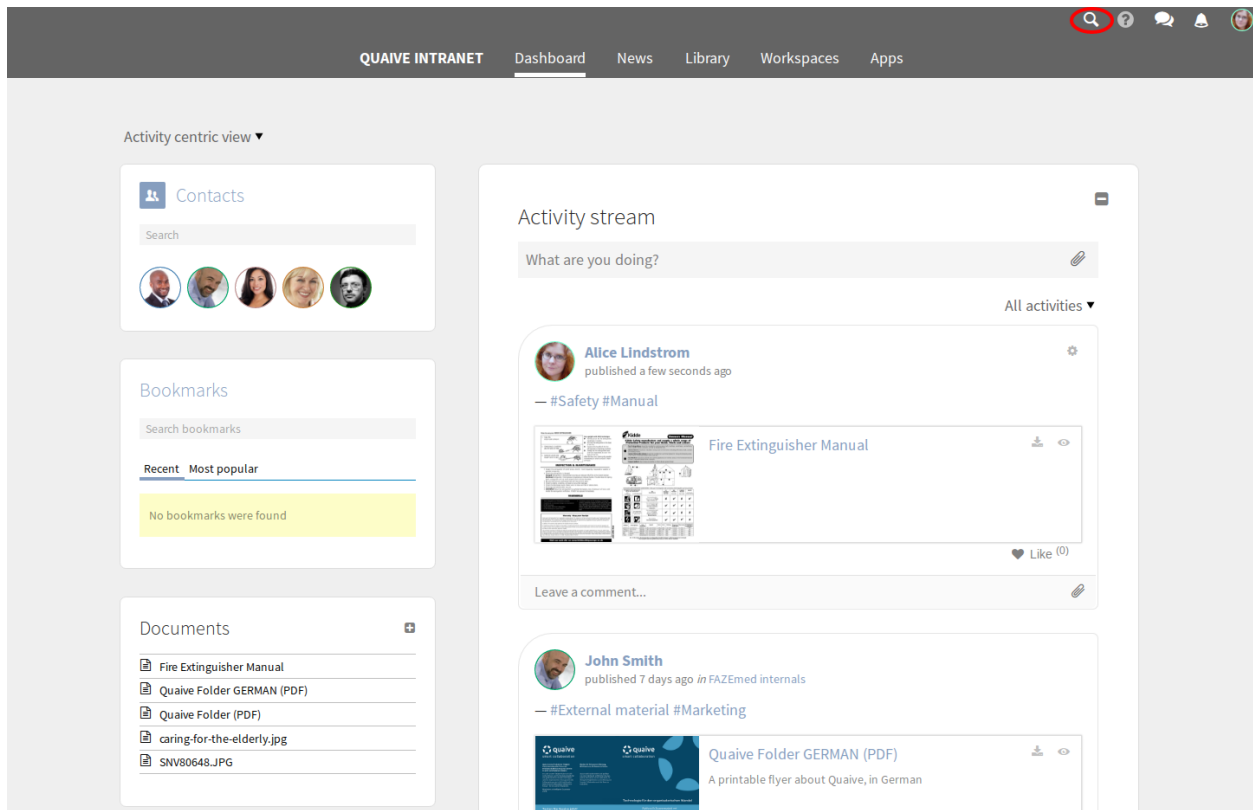
Click it and a text input opens. Enter one or more words that are contained in the document you are looking for.
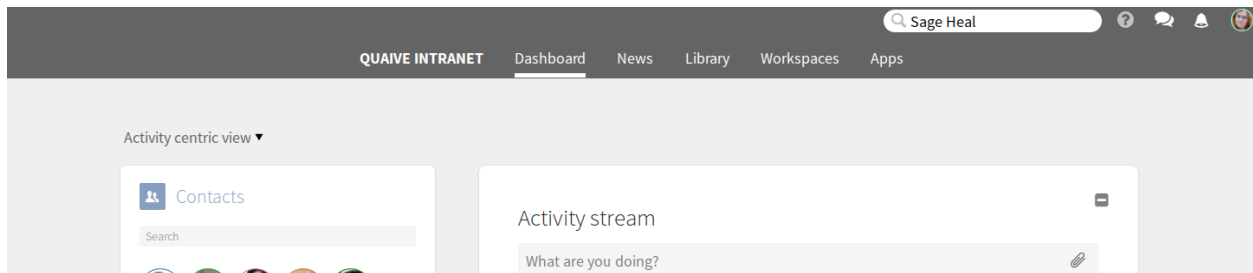
Submit your input by pressing enter. You are taken to the search results page.

7.2 The search results

A list of results is displayed. The results most relevant to the search are shown at the top of the list. Results will have a preview and/or description where available.

There is an options menu that allows you to

- hide the previews to save some space on your screen
- change the sorting to have the most recent results at the top of the list.

Above the results list you can see how many results were found.
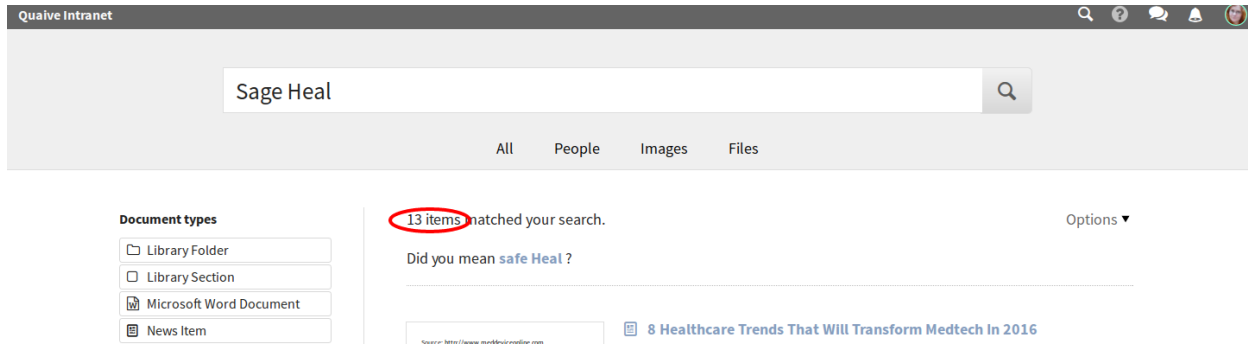
7.3 Filters

New in version 1.1.

If the list is long you can narrow down your search by selecting filters on the left. If, for example, you know the type of document you are looking for then you can select it from the offered document types. The result list is updated to reflect your selection.
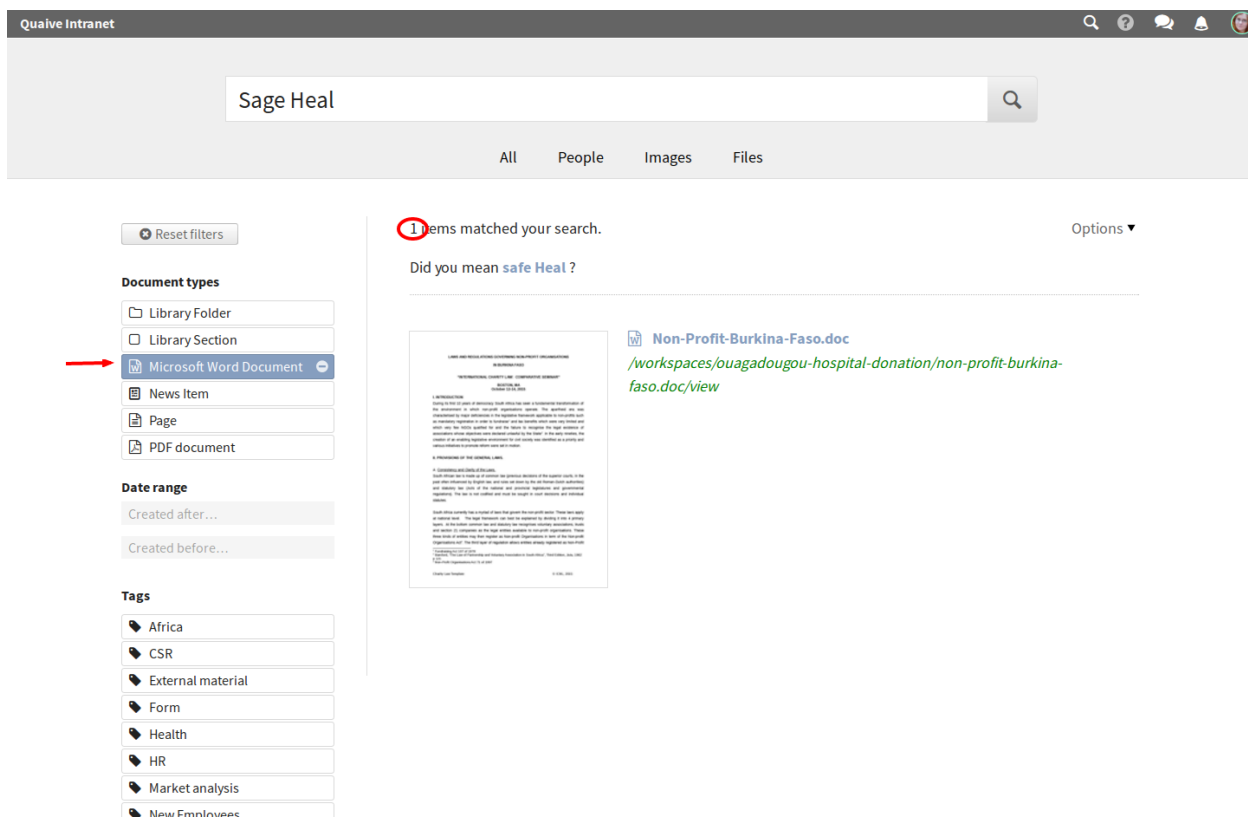
7.4 Spell checking

New in version 1.1.

Even if there is a typo in your search you can still find what you are looking for. The search will suggest search words with similar spelling to those you entered.

7.5 Alternate result views

New in version 1.1.

Several specialized results pages help you search for specific things, for example people. They are accessible as tabs on the default results page.

CHAPTER 8

Social Stream

New in version 1.0.

Coming soon. . .

Changelog

The latest Quaive release is MARS (version 1.2). The latest community release is GAIA (version 1.1).

9.1 What's new in MARS

9.1.1 Apps

- Administrator tools
- Bookmarks
- Calendar
- Messages
- News publisher
- Todo

9.1.2 Layout

- The dashboard can be customized per user
- Welcome splash screens for the users with can be used to train the users after an upgrade

9.1.3 Workspaces

- Improved locking support

9.2 What's new in GAIA

9.2.1 Activity stream

- it is now enabled also on workspace documents
- posts and comments can be edited and deleted
- the posts now fully support attachments previews
- posts can be tagged and we have a tag streams views
- you can follow tags and view a stream filtered to your interests

9.2.2 Apps

- A pluggable system has been setup to include a growing ecosystem of apps
- The case Manager app allows the users to have a full control on the ongoing cases

9.2.3 Workspaces

- Extended sidebar functionality. We now have improved bulk actions to cut, copy, paste, delete, share, and download multiple objects at once
- We support archiving workspaces, cases and documents
- Workspaces and Cases can be grouped in divisions
- Workspaces and Cases can accept guest users
- Cases can be frozen

9.2.4 Layout

- The dashboard page is now customizable site wide
- Added the possibility to easily add some javascript in each page (useful, e.g. for adding piwik or google analytics tracking code)
- The search UI has grown in functionality. We have a complex faceting system and the search results are divided in categories (All results, Peoples, Files, Images)
- Each search result has a rich preview.
- The search options parameters are automatically stored for each user to provide a personal experience
- User profile improved search for user own documents
- User profile editing improved (avatar and other field controlled through the web)

9.2.5 Quaive codebase

- Is now tested against the last stable Plone version (5.0.7 at the time of writing).
- The user profile API has new and more performant methods
- SOLR: maintenance views

- Membrane groups

- WYSIWYG editor switch to redactor