TeamWorks User Help

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About Micro Focus TeamWorks

TeamWorks lets you collaborate with other users in virtual rooms that you join or create.

Supported Mobile Devices and Web Browsers

TeamWorks apps are supported on:

- iOS phones and tablets for iOS 12.*x* or later.

  The TeamWorks app is free in the Apple App Store.
- Android devices for version 8.1 and later.

  The TeamWorks app is available in the Android App Store.
- The following desktop web browsers: Mozilla Firefox, Chrome, Microsoft Edge with Chromium, and Safari on Mac.

Supported Languages

The TeamWorks default display language is defined by the language set for the mobile device or browser you are using. If the language on your device is not supported, the application displays in English.

TeamWorks supports the following languages for users. (Administrative interfaces are English-only.)

- Czech
- Chinese (Simplified)
- Chinese (Traditional)
- Danish
- Dutch
- English
- Finnish
- French
- German
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Portuguese (Brazil)

- Russian
- Spanish
- Swedish

1 Accessing TeamWorks

You can access TeamWorks from a mobile device, a web browser, or by using the GroupWise client.

- This Quick Start covers basic features for mobile devices and web browsers.
- For information on using TeamWorks in the GroupWise client, see the GroupWise 18 documentation (https://www.novell.com/documentation/groupwise18/).

1.1 Access Credentials, Etc.

To connect to TeamWorks, you need to know the following:

- **User ID:** The name that you use to log in to the TeamWorks site.

  If you are a GroupWise user, use your GroupWise Username.
- **Password:** The password for the ID you are entering.
- **Server:** The URL (from your TeamWorks administrator) for the TeamWorks site you are accessing.

  For example, `*TeamWorkssite*.com`.

1.2 Using a Mobile App

To access TeamWorks from a mobile device, do the following:

1. From a supported mobile device, download the TeamWorks mobile app from the applicable app store and install it.
2. When setting up the app, enter your username and so on as prompted (see Section 1.1, “Access Credentials, Etc.,” on page 2).

1.3 Using a Web Browser

To access TeamWorks from a web browser, do the following:

1. Using a supported web browser, enter the URL distributed by your TeamWorks administrator.
2. When prompted, enter your username and password (see Section 1.1, “Access Credentials, Etc.,” on page 2).

2 The Home Page

The TeamWorks interface is basically the same whether you are using a phone, a tablet, or a web browser. In the browser or on a large tablet, you can see the entire interface. On a phone or small tablet, you automatically see the part of the interface that you need for what you are doing.

3 TeamWorks Users

There are two kinds of TeamWorks users:

- **LDAP Users:** These are imported to TeamWorks from an LDAP directory store, such as GroupWise, eDirectory, or Active Directory.

  Normally, these are employees or members of your organization. However, everyone with an account in the LDAP directory store, including those who are contractors and so forth, can be imported and have their information synchronized with TeamWorks.

  The LDAP directory store is the primary information repository for passwords and other data. For example, password-change processes are unchanged.

- **Local Users:** These are created in TeamWorks by administrative users.

  These are usually contractors or others who aren't employees or members of your organization, but who work and collaborate inside the organization.

  Local users change their passwords and manage other information directly in TeamWorks.

4 Rooms

Rooms are virtual locations where conversations and collaboration take place.

There are two kinds of rooms.

- **Public rooms:** Are visible and accessible by all TeamWorks users.

  Example: A room for reporting facilities issues would be a logical candidate for a publicly available room.

- **Private rooms:** Are visible and accessible by only those who are added to the room by the room owner.

  Example: A room for sensitive product development discussions would need to be private.

Table 1 and the sections that follow outline basic TeamWorks tasks and how to do them.

Table 1 Room Tasks

Task	Steps	Notes
Create a room	1. Click or tap the plus icon 2. Name the room and if desired, type a brief description. 3. Rooms are Private by default, meaning that only room members can view and access them. 4. You can add members by clicking the plus icon . Then add users by starting to type their usernames and selecting them in the displayed list. 5. When you have finished adding users, save the changes. 6. If you want everyone to view and use the room, click the **Access** drop-down and change **Private** to **Public**. 7. When you have finished with specifying room information, click **Save**.	Anyone in TeamWorks can do this. As you create a room, you can also set your notification options or you can do this later. **In-App Notifications:** By default, you receive notifications in the app when someone comments on one of your topics or comments (i.e. a **Direct Reply**). **Email Notifications:** By default, Email notifications are enabled only for direct replies. You can also be notified of everything by selecting **All Messages**, or you can disable notifications for the room by selecting **None**. When enabled, email notifications are generated only when events occur while you are not logged in to TeamWorks.
Make a room Private	1. Click or tap the information icon next to the room name. 2. Click or tap **Edit**. 3. Using the Access drop-down options, change the access to Private. 4. Click or tap **Save**. Only those you specifically add can now see the room.	Only the room owner can do this.
Make a room Public	1. Click or tap the information icon next to the room name. 2. Click or tap **Edit**. 3. Using the Access drop-down options, change the access to Public. 4. Click **Save**. All of the information in the room is now publicly visible and accessible.	Only the room owner can do this.

Task	Steps	Notes
Add users to a Private room	1. Click or tap the information icon ⓘ next to a private room name. 2. Click or tap **Edit**. 3. Add users by clicking the plus icon + in the list of members, typing names to display a list, and selecting users from the list. 4. Click **Save** when you're done.	Only the room owner can do this.
Delete a room	1. Click or tap the information icon ⓘ next to the room name. 2. Click or tap **Edit**. 3. Scroll to the bottom of the dialog and click or tap Delete Room. 4. Click or tap **Yes** to confirm. **IMPORTANT:** Deleting a room permanently removes the room and everything in it from the system. The action cannot be undone.	Only the room owner can do this.
Change the room Name or Description	1. Click or tap the information icon ⓘ next to the room name. 2. Click or tap **Edit**. 3. Modify the room name and/or description as desired. 4. Click or tap **Save**.	Only the room owner can do this.
View Room Information	1. Click or tap the information icon ⓘ next to the room name. 2. View the room information. 3. When finished, click or tap **Done**.	Anyone who can see the room can view this.
Remove a room member	1. Tap the information icon ⓘ next to a private room name. 2. Click or tap **Edit**. 3. Remove the member by clicking the X icon ✕ next to the member's entry, or left-swiping if you are on iOS. The member is immediately removed. 4. Click **Save**.	Only the owner of a Private room can do this.

5 Notifications

Notifications let you know whenever you are mentioned in another user's posting.

They can also inform you of activity for topics and comments that you own according to the settings explained in Table 2.

Table 2 *Notification Tasks*

Task	Steps	Notes
Setting your notification level for a room	1. Click or tap the information icon next to the room name. 2. Specify the following: ◆ **The level of notification: None**, **Direct Replies** to your posts, or **All Messages** (all activity in the room). ◆ **Your delivery preference:** In the TeamWorks app, thru email, or both. Notification methods are enabled when you select an option other than **None**. 3. When finished, click or tap **Done** to save your settings.	Everyone participating in a room gets to specify the notifcations they want to receive from that room. In the iOS mobile app, notifications temporarily show in slide-down messages as well as being logged in the Notification Center. Slide-down messages also notify you when you are added to a room.
Using the Notification Center.	1. A badge next to the Notifications alarm bell at the top of the TeamWorks window indicates how many unread notifications you have. 2 Click this to view your notifications. 2. Each notification is listed. Click or tap entries to see the triggering event in context. New entries have a bright green border.	Notifications of being added to a room are not logged in the Notification Center.

6 Topics

Topics start conversations or collaboration efforts within a room.

Example: The HR manager creates a room named **HR Questions** and then creates various topics, such as:

- **Health Insurance**
- **Wellness Program**
- **Company Party**
- **Performance Evaluations**

Table 3 *Topic Tasks*

Task	Steps	Notes
Create a Topic	1. Click or tap a room. 2. Type the topic name in the **New Topic** field at the bottom of the window, then click or tap the send icon. Example: Someone creates a topic in the Facilities Issues room —“My office window is broken.”	Anyone with access to a room can do this in that room.

Task	Steps	Notes
Modify a Topic	1. Click or tap the Menu icon ⋮ next to the Topic. 2. Click or tap **Edit**. 3. Modify the topic as desired. 4. Click or tap **Save**. Example: The person in the above example discovers that the window frame is bent as well. He then modifies the topic to be—"My office window is broken and the frame is bent."	Only the topic creator can do this.
Delete a Topic	1. Click or tap the Menu icon ⋮ next to the Topic. 2. Click or tap **Delete**, then confirm by selecting **Yes**. **IMPORTANT:** Deleting a topic also permanently removes all child comments.	Only the topic creator can do this.

7 Comments

Comments are replies to Topics or to other Comments. TeamWorks visually nests (indents) Comments to indicate their relationships with each other.

Table 4 *Comment Tasks*

Task	Steps	Notes
Comment on a topic or other comment	1. Click or tap the room in which you want to comment. 2. Click or tap the topic or comment you are replying to. 3. Your selection moves to the top of the screen and the **Reply To** field is ready for your input. 4. Type your comment, then click the send icon.	Anyone with access to a room can do this in that room.
Modify a Comment	1. Click or tap the Menu icon ⋮ next to the Comment. 2. Click or tap **Edit**. 3. Modify the comment as desired. 4. Click or tap **Save**.	Only the comment creator can do this.

Task	Steps	Notes
Delete a Comment	1. Click or tap the Menu icon ⋮ next to the comment. 2. Click or tap **Delete**, then confirm by selecting **Yes**. **IMPORTANT:** Deleting a comment also permanently removes all child comments.	Only the comment creator can do this.

8 Tagging or Mentioning Other Users

When you are posting a topic or making a comment, you can cause others to be notified of your posts by mentioning them by name, as follows:

1 At the appropriate place in your text, type the at sign (@) followed by at least the first two letters of the user's name.

A list displays of those who match the string and have access to the room.

2 Click or tap the name of the user you want to mention, and it is immediately added to your text.

3 To shorten the mention to only the first name, use the backspace key to remove any names that follow the first name.

4 To remove a mention, simply backspace over the last and first names.

When you post the topic or comment, all users whom you have mentioned have notifications logged in their notifications list.

9 Attachments

You can attach files at either the Topic or the Comment level. Room participants can then download the files to access them.

Table 5 *Attachment Tasks*

Task	Steps	Notes
Attach a file	1. In a topic or comment that you own, click or tap the Menu icon ⋮. 2. Click or tap **Add Attachment**. 3. Browse to the file you want to attach and select or open it, depending on the system you are using. After a moment, the file is attached	Topic and Comment owners can do this.
Delete an attachment	1. Navigate to the attachment you want to remove. **2. iOS:** Slide the attachment to the left. **Web client:** Click or tap the **DELETE** link. The link to the file is removed.	Topic and Comment owners can do this.

10 Sharing Files and Editing Them Collaboratively

Room members can share files and organize them in folders. They can then edit and maintain them in collaboration with each other

Table 6 File and Folder Tasks

Task	Steps	Notes
Share a file	1. While logged in to TeamWorks, open the room where you want to share the file. 2. Click the **Files** tab, then click **Add File**. 3. Navigate to the file you want to share, select it, then click **Open**. The file uploads to TeamWorks	All users.
Create a folder	1. While logged in to TeamWorks, open the room where you want to create the folder. 2. Click the **Files** tab, then click **Create Folder**. 3. Enter a name for the folder. 4. Use the navigation bar above the list to move within the folder structure you create.	All users.
Editing a file (workstation browsers only).	1. If your administrator has implemented content editing, when you click the modify icon next to a shared file that the editor supports, **Edit File** displays as one of the available actions. 2. Click **Edit File** and it opens in the editor. 3. Use the edit functionality shown in the editor to modify the file. 4. You can see the name of others working in the file in the section they are working on. 5. A PDF file that lists the supported file types is available here.	

11 Avatars, Passwords, and Other Preferences

All TeamWorks users can upload a picture to display as their avatar. Local users can modify their passwords through TeamWorks. Users can also control whether the onboarding video displays when they log in and whether the newest or the oldest topics appear at the top of their room views.

Table 7 Other Tasks

Task	Steps	Notes
Change your Avatar	1. While logged in to TeamWorks, click or tap the gear icon by your current avatar and name, and select **Account**. 2. In a workstation browser or on Android, do the following: a. Click **SELECT AVATAR** at the bottom of the screen. b. Navigate to the file you want to have displayed and select or open it. c. Click **SAVE** to uploaded and save the change. d. Click **DONE**. 3. On iOS, use your Photos or Camera to select a replacement image.	All users.
Change your password (Local users only)	1. While logged in to TeamWorks, click or tap the gear icon by your current avatar and name, and select **Account**. 2. Click the **CHANGE PASSWORD** button. This button doesn't appear for LDAP users. 3. Type your old password, then type and confirm your new password. 4. Click **CHANGE PASSWORD**. You are logged out so that you can log in with the new password.	Only Local users can do this.
Enable or disable the onboarding video that runs when TeamWorks starts (workstation browsers only)	1. While logged in to TeamWorks, click or tap the gear icon by your current avatar and name, and select **Account**. 2. Adjust the **Show Onboarding on login?** slider button as needed for your change. 3. Click **DONE**.	All TeamWorks users can do this using the web app.
Change the Topic listing order	By default, the newest Topics are listed at the top of the room. You can change this as needed. 1. While logged in to TeamWorks, click or tap the gear icon by your current avatar and name, and select **General**. 2. Adjust the **List newest topics first** slider button as needed for your change. 3. Click **DONE**.	All TeamWorks users can do this.

12 Signing Out

To sign out of TeamWorks

1 Click or tap the gear icon by your current avatar and name, then select **Sign Out**.

You are logged out and the sign in dialog displays.

13 Legal Notice

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