

clearvale



# Getting Started

BroadVision

## Clearvale Express Getting Started

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# Contents

	<b>Introducing Clearvale Express</b>	<b>5</b>
	Steps to Set Up a Network .....	5
	Clearvale Express Glossary .....	6
<b>1</b>	<b>Create Your Profile</b>	<b>9</b>
	Setting Up Your Profile .....	10
<b>2</b>	<b>Add Content</b>	<b>13</b>
	Adding Files .....	13
<b>3</b>	<b>Create Communities</b>	<b>17</b>
	Creating Communities .....	18
	Setting Up Your Community .....	20
<b>4</b>	<b>Invite Others</b>	<b>23</b>
	Inviting Members .....	23
	Managing Invitations .....	24
<b>5</b>	<b>Use Your Network</b>	<b>25</b>
	Using Your Activity Stream .....	26
	Accessing Your Files and Communities .....	28
	Making Connections .....	29
	Recognizing Network Members .....	31
	Earning Activity Points .....	32
	Searching for Content .....	33
	Receiving Email Notifications .....	34
<b>6</b>	<b>Administer Your Network</b>	<b>35</b>
	Configuring Your Network .....	35
	Monitoring Network Usage .....	37
	Helping New Members Get Started .....	38





# Introducing Clearvale Express

Clearvale Express is a cloud-based enterprise social network that provides easy and secure collaboration between employees and members of your organization. Clearvale Express lets you quickly and easily start adding content, creating project or department communities, and inviting members to join your network.

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## Steps to Set Up a Network

After creating a Clearvale™ Express network, there are a few steps that are necessary to get your network up and fully off the ground. Take the following steps to make your network successful!

1. **Create your profile.** This is where you upload your picture and set information you want to share with network members like your name, title, and email address.
2. **Add content.** You can add documents (Word, PowerPoint, PDF, and so on), images, or videos. Think about documents that other members might be interested in reading or commenting on. Clearvale offers version control so you can always access, not only the most recent version of a document, but past iterations as well. Think about pictures or videos that you want to share with people who are located offsite. For example, post pictures from marketing events, videos of presentations, and so on.
3. **Create communities.** You can add communities at any time, but maybe you can think of a few offhand that will come in handy right away. For example, if you are creating an intranet for your company, you might want to have department communities, project communities, event communities, and so on. Communities allow network members to work together on a common goal or project.
4. **Invite others.** Your network can only be a collaborative effort if you have others who are willing to work with you. Think about inviting others in your department, your entire company, or an organization.
5. **Start using your network.** Get started by adding a status update, following other network members, and watching your activity stream for network updates. Encourage others to add information. Set an example by frequently sharing information.

6. **If needed, administer your network.** The person who creates your network is automatically the network owner and administrator. They can choose to assign others to help administer the network or even delegate the ownership of the network to someone else. Administration tasks include activities like managing membership, changing the network name, and configuring when the daily digest of network notifications is sent.

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## Clearvale Express Glossary

Clearvale Term	Description
Activity points	A score of how active someone is on a network. Activity points accrue when members post content or edit content on the network. Points are tallied for the current week, current month, as well as a grand total for all activity on the network.
Activity Stream	A stream of network updates that appears on your personal page. Your activity stream contains information related to content, communities, and people within the network that you are following.
Administrator	A role that the network <a href="#">Owner</a> can give to another network member to assist with the management of the network. Your network can have multiple Administrators.  Network Administrators can do almost anything in a network—add content, change the home page, edit communities, and so on.
Communities	A way to organize and share information with a particular group of network members. Communities are useful for organizing information for projects in a central location, encouraging collaboration between team members, and controlling access to sensitive information. Each community can be open or require an invitation. Join the network communities that are of interest to you.
Community administrator	A person who manages a community in addition to the community owner. A community administrator is optional.
Community member	A network member who joined a community. Community members can participate fully in a community.
Community owner	The person who creates a community. This person can administer everything to do with the community, such as add and edit all community content, invite community members, remove community members, and so on.
Content	The documents, photos, videos, and embedded content that are added to your network. When you add content, you decide who you want to share it with. You can also create folders to aid in organizing your content.
Disabled	The role that is assigned to network members who are no longer allowed to access the network. By disabling a network member, you retain any content they provided. You cannot delete a network member.
File versioning	The ability to store and access multiple versions of a file.
Follow	A network member who decides to follow your activity in Clearvale is one of your <i>followers</i> . They receive updates about your activities in their activity stream on their personal page.  When you follow a fellow network member, you are <i>following</i> them. You receive updates about that person's activities in your activity stream.  Members do not need to approve you as a follower. Also, just because you are following someone, doesn't mean that they are following you. They need to choose to follow you.  You can follow people, communities, or specific pieces of content.

Clearvale Term	Description
Group	A group of users with whom you want to share files with, send messages to, or invite to a community. When you create a group, it is private to you and no one else can see or use your group. When you create a group, it is treated like the name of a user and appears in pop-up windows where you select members.
Invitation	A way to invite people to join your network. Someone only becomes a member after they accept the invitation and activate their account on the network.
Network	A Clearvale Express network. You can create a Clearvale Express network by visiting <a href="http://www.clearvale.com">www.clearvale.com</a> . The network is empty when you create it. You need to add content and then invite members to your network.  If you want to upgrade your Express network to a Clearvale Enterprise network, which offers support more content types, such as blogs, forums, and wiki pages, contact your BroadVision® sales representative.
Owner	A role that is automatically assigned to the person who creates a network. The network Owner is basically a network <a href="#">Administrator</a> with these additional privileges: <ul style="list-style-type: none"> <li>• Delegate the network Owner role to another network member</li> <li>• Receive network feedback</li> </ul>
Share settings	A setting you specify when you add content. It determines who can see the content. Possible settings are: <ul style="list-style-type: none"> <li>• All Network Members—all network members can see the content.</li> <li>• Community Members—only members of the selected communities can see the content.</li> <li>• Select individuals—only the selected members can see the content.</li> </ul>
Personal page	The page that appears when you click the <b>My Page</b> tab. Each network member has a personal page in the network. Use this page to access your communities, files, and activity stream.
Rating content	A way for network members to show the value of content by clicking the Thumbs Up or Thumbs Down icon next to content.
Recognition	A way for network members to recognize the efforts of other members. Recognition appears as a small icon on the member's personal page. For example, you can choose from several icons as well as include a personal message.
Roles	A value assigned to each member that determines what they can do within the network. Roles include: <ul style="list-style-type: none"> <li>• <a href="#">Owner</a></li> <li>• <a href="#">Administrator</a></li> <li>• <a href="#">Writer</a></li> </ul>
Suggested Content	A block on your personal page where you can find suggested content, communities, and people that you might want to follow.
Tags	The tags you specify for any content that you upload. The tags are used when searching on content.
Writer	A role that is assigned to network members that allows them to add content in the network. You can configure the Writer role so that writers can or cannot create and manage communities. By default, writers can create communities.

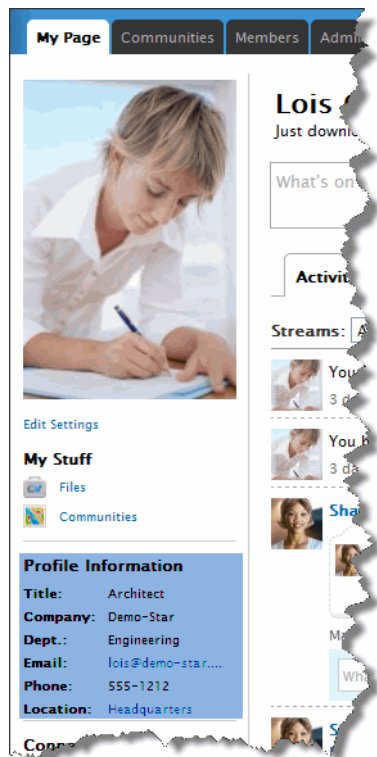
Introducing Clearvale Express  
Clearvale Express Glossary



# 1

## Create Your Profile

When you start using Clearvale Express, set up your personal profile. Your profile includes information about yourself (such as your job title and your location) as well as a photo of yourself.



## Setting Up Your Profile

To add some information about yourself

1. Click the **My Page** tab and then click **Edit Settings** on the left side of your Clearvale window. The Edit Profile page appears.
2. Add values to the fields that you want to specify.

**Edit Profile**

**First Name** Lois

**Last Name** Griswald

**Display Name**

This is how your full name will be displayed throughout the network.

**Title** Architect

**Company** Demo-Star

**Dept.** Engineering

**Email** lois@demo-star.com

**Phone** 555-1212

**Location** Headquarters

**Edit Thumbnail**

**Upload a new photo**

Choose File No file chosen

Upload

NOTE: Clicking "Upload" will immediately replace your profile picture. This cannot be undone.

Save Cancel

Whatever information you specify here appears in the Profile Information area of your personal page. Other network members will see this information when they view your page.

Use the **Display Name** field to show a name other than your first and last name in the network. For example, if you want to be known as Dr. Griswald, enter that in the **Display Name** field.

3. Click **Save**.

### To add a profile picture

1. Make sure you have access to a profile picture you want to use on your computer.  
This file must be a .gif, .jpg, or .png file.
2. Click the **My Page** tab and then click **Edit Settings** on the left side of your Clearvale window.  
The Edit Profile page appears.
3. On the left side of the page, under **Upload a new photo**, click **Browse** or **Choose File** (depending on your browser), select your photo, and then click **Upload**.  
The Edit Thumbnail page appears where you can crop your image to create a thumbnail image. You might want to create a thumbnail image if your photo contains a lot of extra space and you want to focus in more on your face.
  - If you create a thumbnail image, this image appears next to all content that you add on the network. Your full image still appears on your personal page.
  - If you do not create a thumbnail image, your full image is used throughout the network.
4. To create a thumbnail, drag a square across the image to highlight the part of the image to use as a thumbnail and then click **Create Thumbnail**.  
You can continue resizing or moving the selection box until you are satisfied with the thumbnail image.
5. To skip creating a thumbnail image, click **Cancel**.  
The Edit Profile page reappears and now shows your profile photo.



# 2

## Add Content

When you first create a Clearvale Express network, it contains no content. You and the other network members need to add the content.

---

### Adding Files

Files include documents, images, and videos. Consider adding files that you want some or all of the network members to see. If you have files that are specific to a community, you can add them directly to the community.

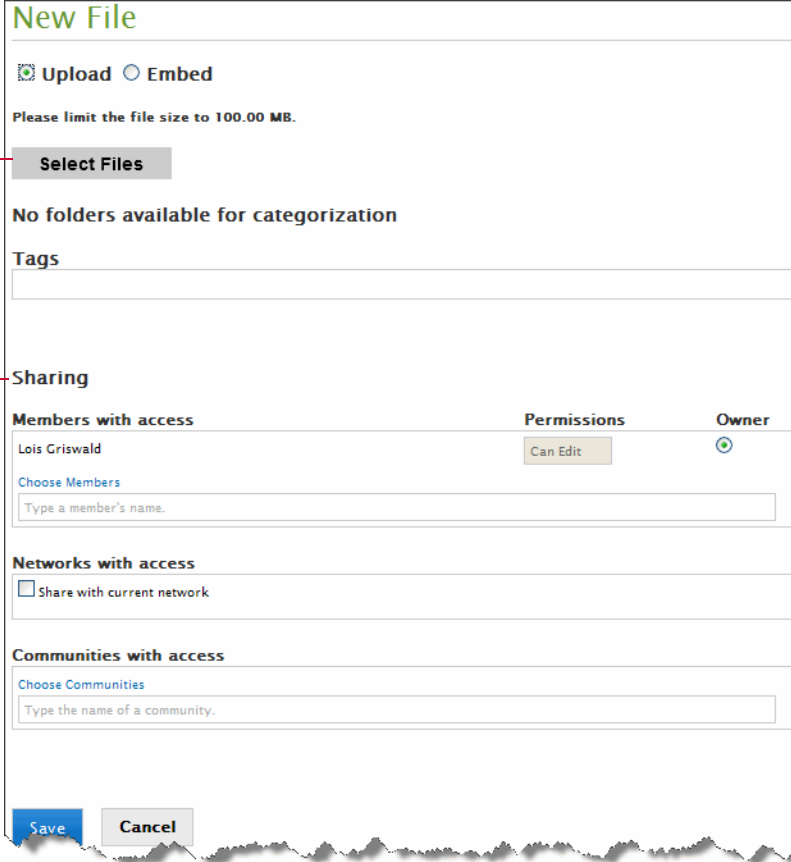
Uploading Files [To add files to your network](#)

1. Click the **My Page** tab if you are not already on this page.
2. Click **Files** under **My Stuff**.
3. Click **Add File**.

4. Fill in the fields on the Add File page.

Click here to navigate to the file to upload.

Decide how you want to share the file with others in the network—specific members, the entire network, or one or more communities.



The screenshot shows the 'New File' interface. At the top, there are radio buttons for 'Upload' (selected) and 'Embed'. Below this is a note: 'Please limit the file size to 100.00 MB.' A 'Select Files' button is highlighted with a red line and an annotation. Below the button, it says 'No folders available for categorization'. There is a 'Tags' input field. The 'Sharing' section is also highlighted with a red line and an annotation. It contains a table with columns 'Members with access', 'Permissions', and 'Owner'. The first row shows 'Lois Griswald' with 'Can Edit' permissions and a green lock icon. Below the table is a 'Choose Members' link and a text input field 'Type a member's name.'. There are also sections for 'Networks with access' (with a 'Share with current network' checkbox) and 'Communities with access' (with a 'Choose Communities' link and a text input field 'Type the name of a community.'). At the bottom are 'Save' and 'Cancel' buttons.

Members with access	Permissions	Owner
Lois Griswald	Can Edit	

For information on how to share a file, see [“Sharing Files”](#) on page 16

5. Click **Save**.

## Embedding Content

You can embed content that is stored on another website, such as YouTube. Embedding content means that your content does not actually reside in the network. Instead, it is on a hosting site and you simply refer to it from Clearvale.

### To embed content

1. Click the **My Page** tab.
2. Click **Files** under **My Stuff**.
3. Click **Add File**.
4. On the Add File page, click the **Embed** radio button instead of the default button, which is **Upload**.

Enter the embed code here for the video. You need to copy this from the hosting site.

**New Embedded Content**

Upload  Embed

**Embed Code**

**Type**  
Video

**Title**

**Description**

B I U abc Font Size A A Bulleted list Numbered list Indent Outdent Quote Table Link Unlink HTML

For information on how to share embedded content, see [“Sharing Files,”](#) next

5. Click **Save**.

### Sharing Files

When you add a file, you set the share settings. Options are:

- **Just you.** Choose no sharing options. You will be the only one who can see the file that you uploaded (with the exception of network administrators and owners who are looking at the network in Private Access Mode).
- **One or more individuals.** Choose the members with whom to share the content in the **Members with access** field.
- **A group of people that you have predefined.** Choose the group with which to share the content in the **Members with access** field.
- **A community.** Choose the community with which to share the content in the **Communities with access** field.
- **Everyone in the network.** Check the **Share with current network** option in the **Networks with access** field.

When you share the file, you decide the kind of access people will have. Options are:

- **Is Owner.** Use this to assign a new owner to the file. The owner of the file can edit and delete the file. Each file can have only one owner at a time. When you delegate ownership, you are automatically assigned **Can Edit** access.
- **Can View.** This is the default sharing value. People you share with can see the file but cannot make changes to it.
- **Can Edit.** Use this to let people make changes to the file.



# 3

## Create Communities

Clearvale communities provide a way for groups of network members to work together. They are useful for organizing information for projects in a central location, encouraging collaboration between team members, and controlling access to sensitive information.

Typically, any network member can create a community. Before creating a community, think about the following:

- What is the purpose of the community?
- Who must participate in the community? Who else might be interested in the business being conducted in the community?
- Who will add the content to this community?
- Is the community content private? Or, can any network member see the content?

By answering these questions before creating a community, you are clear on the community's purpose, know whom to invite to join the community, and can easily add the content.

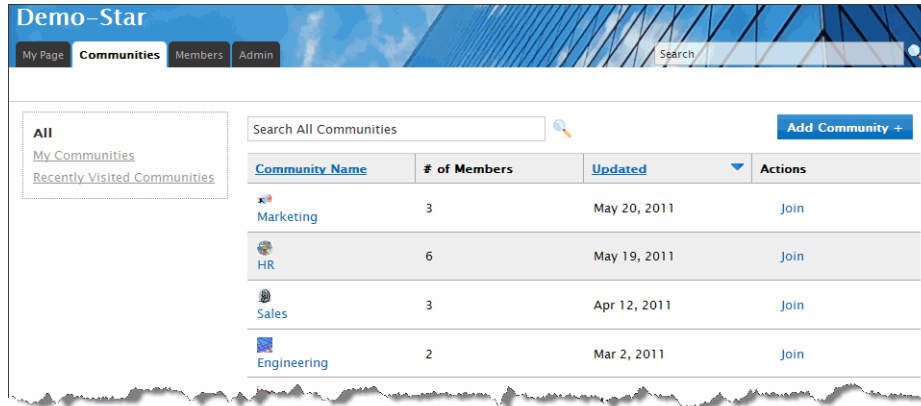
## Creating Communities

Network owners and administrators can always create communities. And depending on how your network is configured, members with the writer role may also be able to create communities.

### To create a community

1. Click the **Communities** tab.

The Communities page appears. It lists all the communities defined for your network.



2. To add another community, click **Add Community**.
3. Type a name for your community.
4. Under **Membership**, select one of the following:
  - **Open** to let anyone join the community.
  - **Invitation Only** to limit members to those who are invited.

See “[Open Versus Invitation-only Communities](#),” next, for more information on differences.

5. Click **Choose Members** to select network members to invite to your community.  
If you have created a group of users, you can also invite the group. See the Clearvale online help for information on creating groups of users.
6. Include a personal message for invitees so they know the purpose of the community.
7. Set the privacy for the community. See “[Understanding Community Privacy Settings](#)” on page 19.
8. Click **Save**.

### Open Versus Invitation-only Communities

You can set up your community so that it is:

- **Open.** This allows all network members to choose to join the community. All network members will see the community on the Communities page, under **All communities**. A **Join** link appears next to the community allowing them to join the community at any time.
- **Invitation Only.** This limits community access to those that you invite. Network members will not see the community on the Communities page.

### Understanding Community Privacy Settings

When you create a community, you need to set the privacy setting for the community. It determines who can see the community. Options are:

- **Community Members.** Use this option to limit the community to just community members. Network members will not see the community unless they are invited to join the community.
- **Network Members.** Use this option to let all network members see the community. By being able to see the community, network members can navigate to the community and see any content in the community that has its privacy set to **Network Members**.

The value you specify for the community privacy determines the default privacy setting for new content that is added to the community.

### Assigning an Image to the Community

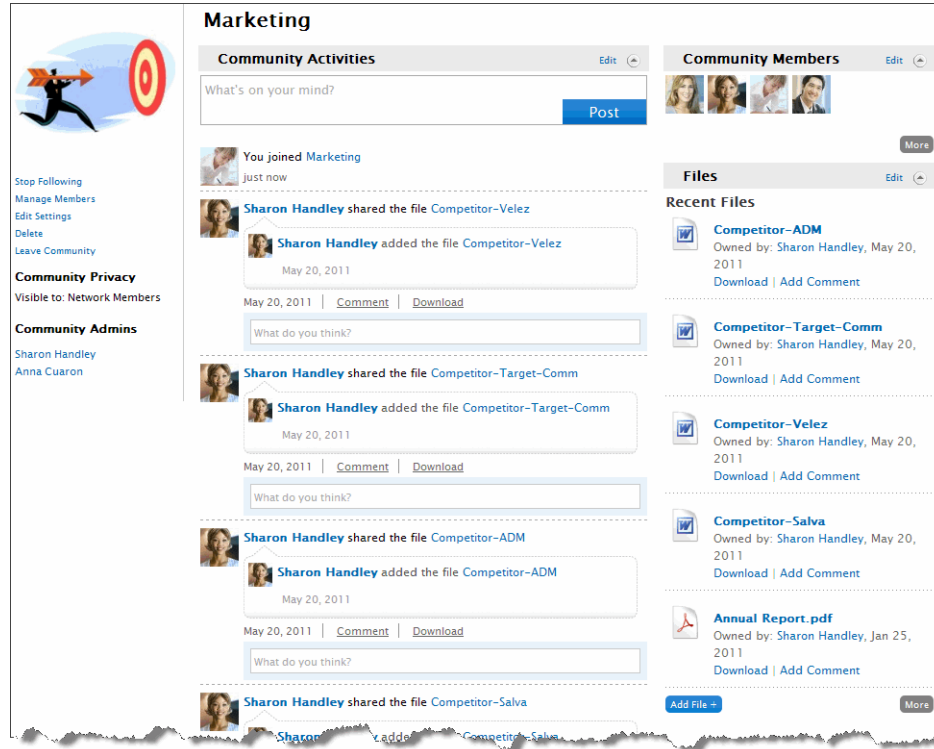
If you assign an image to a community, it appears in the upper-left corner on the community page.

#### To assign an image for your community

1. On the community page, click the **Edit Settings** link.
2. Under **Community Icon**, click **Browse**.
3. Navigate to the image file to use for your community.  
This file must be a .gif, .jpg, or .png file.
4. Click **Save**.

## Setting Up Your Community

Setting up your community includes adding content to your community, inviting members, and sharing updates in the community activity stream. After you set up your community, it might look something like this:



**Adding Content** Any community member can add content to the community.

If you plan to add a lot of content to a community, consider creating folders to organize the content. See the Clearvale online help for information on creating folders.

### To upload a file to the community

1. Click the **Communities** tab.
2. Click on the name of your community.
3. In the Files block, click **Add File**.  
The Add Files page appears.
4. Upload files like you did on your personal page (see “Adding Files” on page 13.)  
In the **Communities with access** block, make sure that your community is listed so that the file is associated with the community.
5. Click **Save**.

**Inviting Members** You can set up your community so that you:

- Invite members to join the community
- Let members join on their own

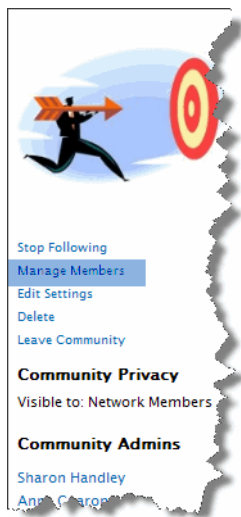
When you invite a network member to join a community, the network member gets a message about being invited to the community and needs to accept the invitation. Once they accept the invitation, they are a member of the community.

If you allow network members to join on their own (set the community as open), any network member can access to the community and not require any additional approval before joining the community.

If you have not invited members to the network yet, you can simply assign new members to communities when you invite them to the network. For example, if you create a sales community, when you invite sales team members to the network, select the sales community for them.

**To invite network members to join a community**

1. Go to your community.
2. Click **Manage Members**.



3. Click the **Invite Members** link.

**Manage Members**

Search Members

Name	Joined Date	Community Role	Actions
Anna Cuaron	May 20, 2011	Admin	Remove
Sharon Handley	Jan 25, 2011	Owner	
Lois Griswald	10 minutes ago	Member	Leave
Landon Oliver	Jan 25, 2011	Member	Remove

**Members**

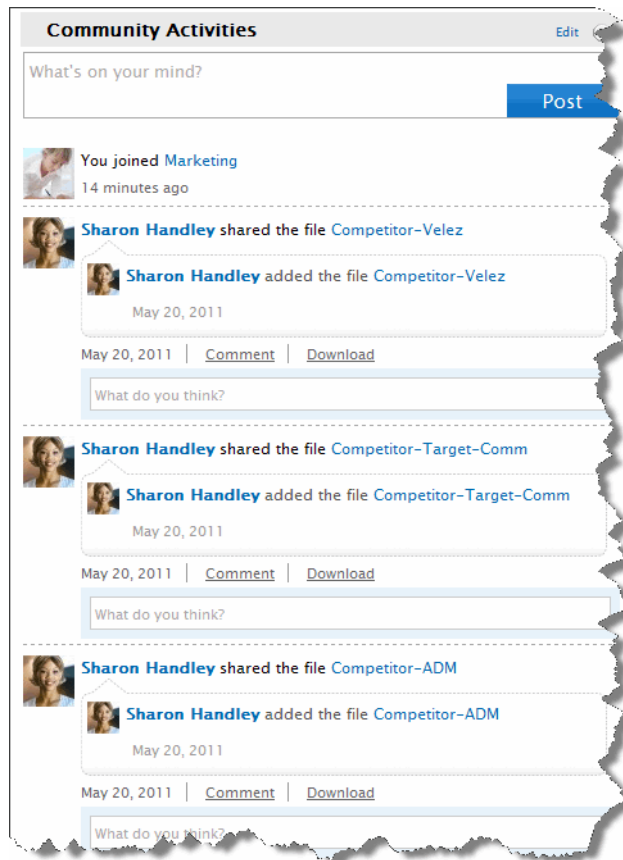
- [Invite Members](#)
- [Invitations](#)
- [Join Requests \(0\)](#)

4. Click **Choose Members**, and then place a checkmark next to each member that you want to invite to the community. Click **Done** when done selecting invitees.
5. Include a personal message about the purpose of the community and why you are inviting them to join.
6. Click **Invite**.

The member is invited and appears on the **Invitations** page until they accept the community membership invitation. Once they accept the membership, they are removed from this page and then appear on the **Members** page.

Using the  
Community Activity  
Stream

The community activity stream shows what has been happening within the community. When community documents are added or members join, you see these messages in the community activity stream.



You can share information with all community members by typing a message in the **What's on your mind** field.

# 4

## Invite Others

After you have added some content to your network, go ahead and invite others to join you in the network. When you invite members, you assign them a network role. If your network has communities, you can additionally add them as members of the one or more communities when you invite them.

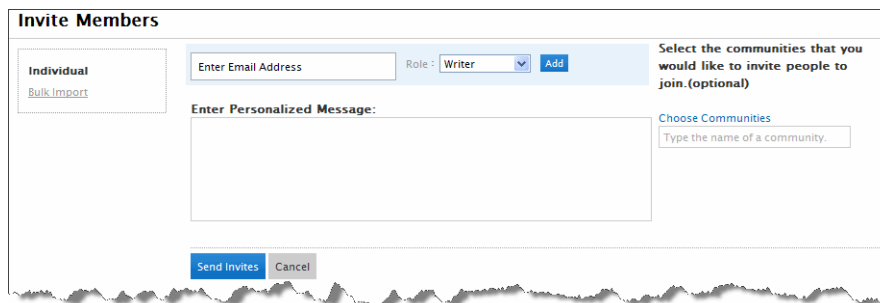
**TIP:** If you are a network administrator and have a large number of members to invite to your network, use the bulk upload option, which is described in the Clearvale online help.

---

## Inviting Members

To invite network members

1. Click the **Members** tab.
2. Click the **Invite Members** button.



3. Enter the e-mail address of the person to invite.  
Note that if you are a network administrator, you can select a role for the member:
  - Writer
  - AdministratorIf you are not an administrator, the writer role is used.
4. Click **Add**.

5. If you are a network administrator, and if you have some communities created, assign communities to your invitees:
  - a. Click **Choose Communities** to display the network communities.
  - b. Select one or more communities to which you want to assign the new members.  
When the invitees accept your network invitation, they automatically become members of the communities to which you assigned them.
6. Optionally, write a personalized message to include with the invitation.
7. Click **Send Invites**.

---

## Managing Invitations

Sometimes, you might send an invitation and then notice that the invitee never appears as a member of the network. Some possible reasons are:

- They haven't accepted the invitation. As a network administrator, you can select **Admin>Member Administration>Pending Invitations** to see invitations that were sent but not accepted yet.
- They never received the invitation. In this case, have them check their spam folder to see if the invitation is there.



# 5

## Use Your Network

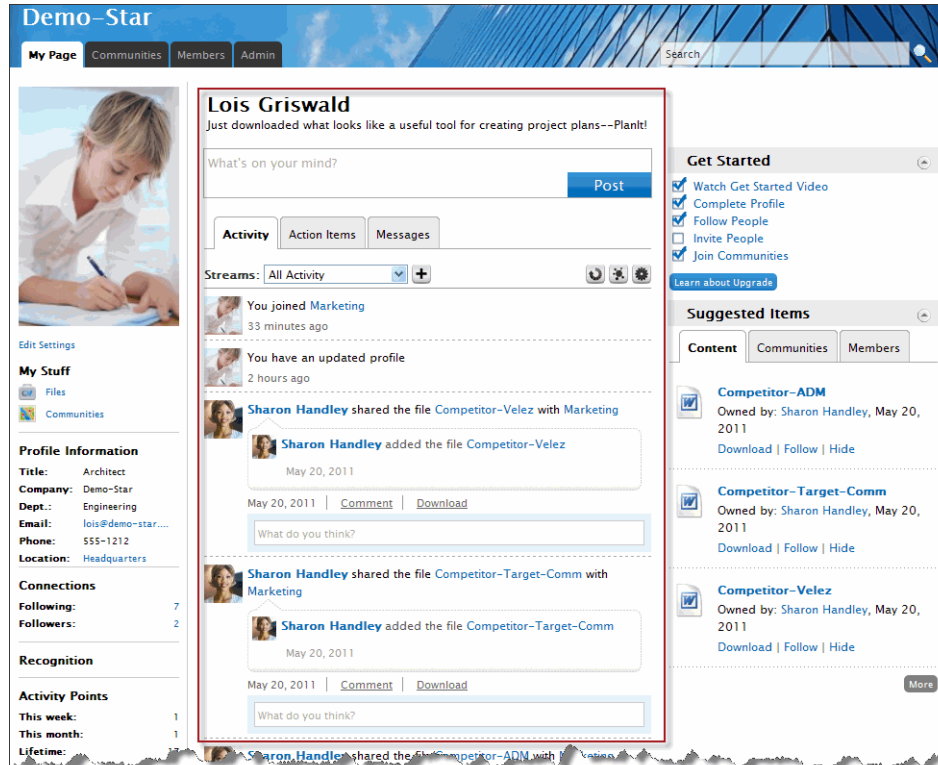
When you click the **My Page** tab in Clearvale Express, your personal page appears. It looks similar to the following:

The screenshot shows a user's personal page for 'Lois Griswald' on the 'Demo-Star' platform. The page is titled 'My Page' and includes navigation tabs for 'Communities', 'Members', and 'Admin'. A search bar is located in the top right corner. The main content area features a profile picture of Lois Griswald, a status update 'Just downloaded what looks like a useful tool for creating project plans--Plant!', and a 'What's on your mind?' text box with a 'Post' button. Below this are tabs for 'Activity', 'Action Items', and 'Messages'. The 'Streams' section shows a list of recent activities, including 'You joined Marketing' and 'You have an updated profile'. The 'Suggested Items' section lists several documents, such as 'Competitor-ADM', 'Competitor-Target-Comm', and 'Competitor-Velez', each with a 'Download | Follow | Hide' link. The left sidebar contains sections for 'Edit Settings', 'My Stuff' (Files, Communities), 'Profile Information' (Title, Company, Dept., Email, Phone, Location), 'Connections' (Following: 7, Followers: 2), 'Recognition', and 'Activity Points' (This week: 1, This month: 1, Lifetime: 1).

This chapter talks about how to use the various features on this page.

## Using Your Activity Stream

In the center of your personal page, is your activity stream.



The activity stream keeps you up to date with what is going on within your network. In particular, it shows the activities related to the network members, communities, and content that you are following. For more information on following members, communities, and content, see [“Making Connections”](#) on page 29.

### Sharing a Status Update





You can post a message to the people that are following you by posting something in the **What’s on your mind?** field. Enter a message and then click **Post**. The post appears in the activity stream and is visible to you and your followers.

### Changing the Content in the Stream

You can change the activities that appear in your activity stream by selecting an option from the **Streams** drop-down:

- **All Activity.** Shows all activity updates from all members that you are following, all content that you are following, and all communities that you are following. This option also includes all of your updates.
- **Followed Activity.** Shows all activity updates for all members, content, and communities that you are following, but does not show your updates.
- **My Activity.** Shows just your updates and no one else’s activity updates.
- **My Content Activity.** Shows all activities performed on your content by other members. For example, this includes comments made on your content and any updates made to the content by those who have edit authority.
- **Status Updates.** Shows just the status updates for the members that you are following.

Additionally, you can use the following buttons to change the activity stream:

Button	Purpose
	Allows you to create a new filter for the activity stream.
	Refreshes the content in the activity stream.
	Displays the Connections page where you can change your follow settings.
	Displays the Follow & Activity Settings page where you can set your notification preferences for the activity stream and if you want email notifications.

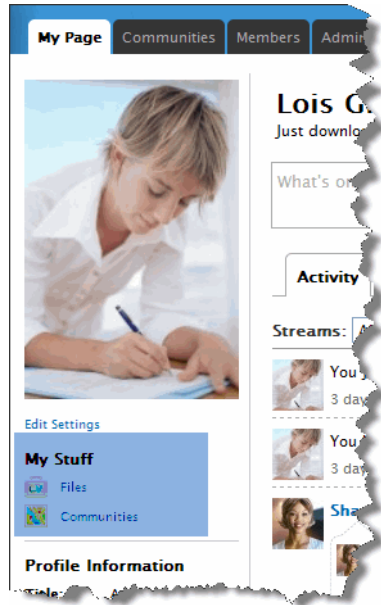
**Using Action Items** The **Action Items** tab in the activity stream contains activities that require attention from you. These include:

- Community invitations
- Review Network Feedback (network owner and administrators only)

**Using Messages** The **Messages** tab in the activity stream allows you to exchange private messages with other network members.

## Accessing Your Files and Communities

The My Stuff block contains links to your files and communities in the network.

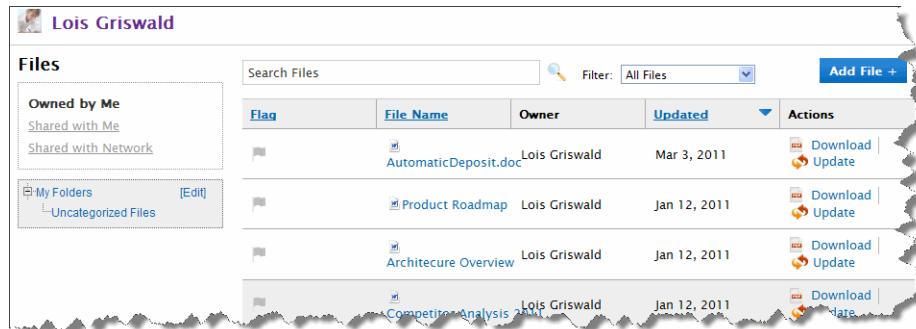


### Navigating Your Files

When you click the **Files** link, the Files page appears. It shows all the files that you uploaded; these are the files that are owned by you.

Use these links to display other files to which you have access.

Create folders to categorize your files by clicking **Edit**.



Add new files by clicking **Add File**.

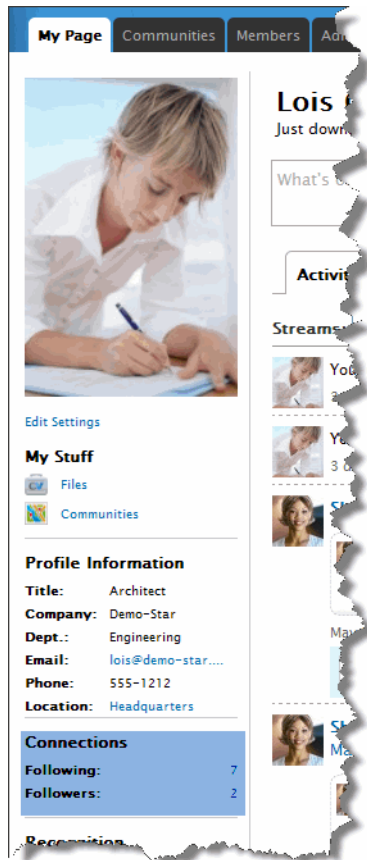
Click the links on the left to display the files that others uploaded and shared with you, or files that others have uploaded and shared with the entire network.

### Navigating Your Communities

When you click the **Communities** link, the Communities page appears. It shows all the communities that you have joined.

## Making Connections

The Connections block shows the number of network members that you are following and the number that are following you.



Network members can connect with or follow other network members. By following other network members, you are kept in the loop regarding content that these people are publishing on the network. For example, you might want to follow your boss and your direct reports so that you are aware of what is going on within your own department. You might also want to follow other people in the company who do the same job that you do so you are aware of what they are up to. If you have a mentor, you can follow them as well.

When you follow other network members, you are notified when they do certain tasks, such as:

- Create content that you have permission to see
- Join a community
- Update their status
- Update their profile information

The notification appears in the activity stream on your personal page.

When you follow another network member, they do not automatically follow you as well. If the network members want to follow your activities, they need to select the option themselves.

## Chapter 5 Use Your Network Making Connections

To set your connections, click the **Members** tab. The Members page appears.

Click here to see all the people that you are following and those that are following you.

Name	Company	Department	Actions
Anna Cuaron	Demo-Star	Marketing	Stop Following
Sharon Handley	Demo-Star	Marketing	Stop Following
Lois Griswald	Demo-Star	Engineering	
Jeremy Louden	Demo Star	Engineering	Follow
Sabrina Lu	Demo Star	HR	Follow
Landon Oliver	Demo Star	Sales	Stop Following
Alison Peterson	Demo-Star	HR	Stop Following

Click here to follow a member.

**Following Content and Communities** In addition to following network members, you can follow a piece of content or the activities of a community.

When you follow a piece of content, you are notified of when the content is updated or someone comments on the content. When you follow a community, you are notified of certain tasks, such as:

- Someone joins the community
- Content is added or shared with the community
- A message is added to the community activity stream

To follow a piece of content, navigate to the content, such as a file, and click **Follow**. To follow a community, navigate to the community and click **Follow**. When you join a community, you are automatically following that community.

### Using the Suggested Items Block

The Suggested Items block shows content, people, and communities that you might be interested in following.

**Suggested Items**

**Content** Communities Members

**Competitor-ADM**  
Owned by: Sharon Handley, May 20, 2011  
Download | Follow | Hide

**Competitor-Target-Comm**  
Owned by: Sharon Handley, May 20, 2011  
Download | Follow | Hide

**Competitor-Velez**  
Owned by: Sharon Handley, May 20, 2011  
Download | Follow | Hide

More

As you select items to follow from this block, they are removed and refreshed with other information that may be of interest to you until there is no more to suggest.

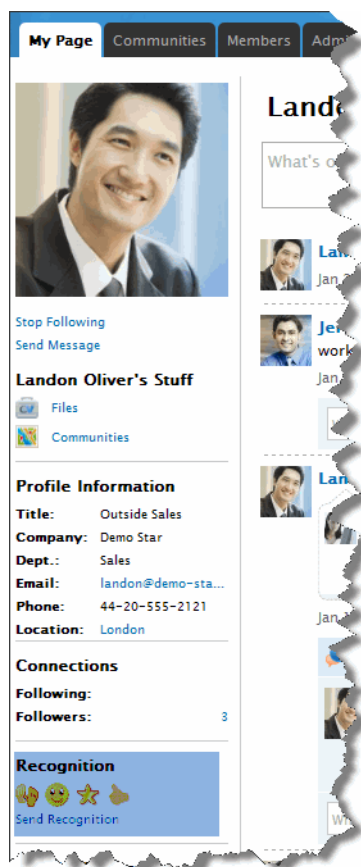
## Recognizing Network Members

You can recognize the effort of other network members by giving them recognition gifts. The gifts are icons that appear on their personal page. You can optionally include a message along with the gift.

To send recognition to a network member

1. Click the **Members** tab.
2. Click on the name of the network member that you want to give recognition to.

Their personal page appears.



3. Click **Send Recognition**.
4. Optionally, include a message.
5. Indicate whether the gift and message should be public or private.
  - Select **Public** to let everyone see the message you wrote and to see that the gift was from you. People can see who sent the gift and any message by hovering the mouse over the gift.
  - Select **Private** to let everyone see the gift, but they will not see the message you wrote and they will not know you sent the gift.

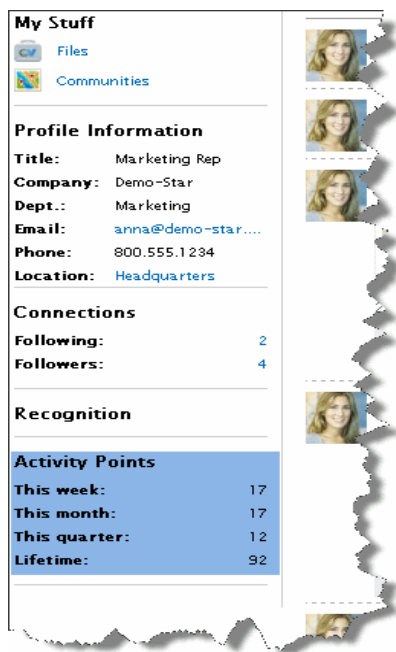
6. Select the gift to send.

The gift appears immediately on the member's personal page.

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## Earning Activity Points

You earn activity points as you participate in your Clearvale network.



The screenshot shows a user profile page with the following sections:

- My Stuff**: Includes links for Files and Communities.
- Profile Information**:
  - Title: Marketing Rep
  - Company: Demo-Star
  - Dept.: Marketing
  - Email: anna@demo-star....
  - Phone: 800.555.1234
  - Location: Headquarters
- Connections**:
  - Following: 2
  - Followers: 4
- Recognition**: (Empty section)
- Activity Points**:
  - This week: 17
  - This month: 17
  - This quarter: 12
  - Lifetime: 92

On the right side of the profile, there are several small profile pictures of the user, some of which are partially obscured by a decorative, torn-edge border.

You receive 3 points when you:

- Upload a file
- Create a community

Additionally, you earn 1 point each time you do one of the following:

- Update or comment on a file
- Join a community
- Rate content (give it a thumbs up or thumbs down)

Points are tallied for the current week, month, and quarter. A lifetime total is also provided—basically a grand total of your activity points since the network was created. The points are specific to the current network.



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## Searching for Content

Clearvale's Search bar appears near the top of the page. Searches are case-insensitive and results appear in order of relevance. You can search using:

- **Whole words.** For example, you might search on the term *Blog*. Searching in this manner can produce many results—any content that contains that specific word.
- **Multiple Whole Words.** For example, you might search on the term *My First Blog*. Searching in this manner produces content that contains all three words; however the words may not appear next to each other or in that order.
- **Whole Words in quotes.** For example, you might search on the term “*My First Blog*” Searching in this manner limits the search to the exact string within the quotes.
- **OR keyword.** For example, you might search on the term *My OR First OR Blog*. Searching in this manner produces content that contains any of those three words: *My First Blog*, *My First Blog Post*, *My First Photo*, *Finance Blog*, and so on. OR must be entered in all uppercase letters.
- **Wildcards.** If you only know the partial name of an item you need to find, you can use the asterisk. For example, you might type something like “Marketing\*” and the results will return all items with this string, such as “Marketing Budget,” “Marketing Meeting Notes,” and so forth.
- **Tags.** When creating content in the network, you are prompted to enter tags for your items. The tags allow members to find the associated content when searching the site. Tags do not replace searching by content and are not required; instead, tags offer another mechanism for you to use when organizing and looking for items. You can use apostrophes to tag items. For example, your tag might look something like *ACME's Holiday Party*.

**NOTE:** A search on a partial word will not return results. For example, if searching for *My First Blog*, using *My Fir* as the search term will not return any results, but *My First* will.

You can search for:

- Members, communities, files, photos, and videos
- Content within PDF files
- Content within Microsoft Office 2000 and 2007 Word, Excel, and PowerPoint files

### To search for text

1. Enter the term for which you want to search in the **Search** field at the top of the Clearvale window and click ENTER.  
The Search results page appears.
2. If you find what you want in this list, you can click on it to read more.
3. If you do not find what you want on this list, drill down to display additional results in a particular category.


**IMPORTANT:** If you perform a search and do not find what you want, you might not have permission to access the item. For example, if you search for an item named *Marketing Budget* and it is a file that is not shared with you, you will not be able to access the item. Additionally, if you or someone

else just posted an item, it may take a few minutes to show in the search results. For items that reside in communities to which you do not belong, but can join, a Join community link displays in the results.

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## Receiving Email Notifications

You can configure Clearvale to send you email messages in certain cases, such as when someone writes on your personal page or comments on your content.

To set up some email notifications, click **Settings**  at the top of the activity stream. Place a checkmark next to the email notifications that you would like to receive and then determine when you want them to be emailed—each notification message sent instantly, a daily digest of notifications, or both (instant messages and a daily digest).

# 6

## Administer Your Network

As the network owner or administrator, you can configure your network as needed and monitor its usage. Additionally, you may want to take some steps to encourage new members to get started using your network.

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### Configuring Your Network

As the network owner or administrator, you can configure the following:

- Change the name of the network.
- Change the language of the network.
- Configure when the daily notification digest is sent to members that have requested it.
- Configure whether member activity points are listed on the Members page.
- Configure how your network looks on mobile devices.

**TIP:** You can also integrate your network to use Google Apps. For details on this integration, see the Clearvale online help.

#### To change the network name

1. As a network owner or administrator, click **Admin>Network Administration**.
2. In the first field, specify the name of your network.
3. Click **Save**.

#### To change the language of a network

1. Select **Admin>Network Administration**.
2. Select a different language in the **Default Network Language** drop-down list.
3. Click **Save**.

To configure when the daily notification digest is sent

1. As a network owner or administrator, click **Admin>Network Administration**.
2. In the **Network Email Digest Schedule** field, select your preferred time zone and then select the preferred delivery time.
3. Click **Save**.

To configure whether activity points appear on the Members page

1. As a network owner or administrator, click **Admin>Network Administration**.
2. Check the **Show Activity Points in Member List Display Page** option.  
When you enable this option, an additional column appears on the Members page that lists the activity points for each network member. Additionally, the members are sorted on this page by their total lifetime activity points instead of alphabetically by their last name.
3. Click **Save**.

You can configure an optional page that facilitates using your network on a mobile device. The Important Items page provides a quick link to the detail page of specific network members or communities.

To configure an Important Items page for mobile devices

1. Select **Admin>Mobile**.
2. Check the **Activate** checkbox.
3. To make the Important Items page the initial page displayed when your network is viewed in a mobile browser, check the **Use as Landing Page** checkbox.
4. To change the name of the Important Items page, enter a different name in the **Page Name** text box.
5. Select the people and communities considered important for your network.
6. Click **Save**.

## Monitoring Network Usage

Clearvale provides a network statistics page where you can see how much disk space your network is using, who has been using your network, and how much content has been added to your network.

### To check disk space usage

1. Click the **Admin** tab.  
The Statistics page appears.
2. Scroll to the **Network Disk Space** section.

Network Disk Space	
Total Disk Space :	3.94 Gigabytes
Used Disk Space :	2.88 Gigabytes (73.08%)

If you need additional disk space, contact your BroadVision Sales Representative, or send an email to [sales@broadvision.com](mailto:sales@broadvision.com).

### To see who has been using your network

1. Click the **Admin** tab.  
The Statistics page appears.
2. Scroll to the **Member Activity Log** section.  
The most recent members to use your network are listed.

### To see how much content has been added to your network

1. Click the **Admin** tab.  
The Statistics page appears.
2. Scroll to the **Entities on network** section.  
It lists the number of files, groups, and communities that have been created for your network.

## Helping New Members Get Started

When you create a new network, you may need to help your new network members get started:

- Encourage members to join your network. You may want to send an email to let people know ahead of time that you are setting up a network and will be inviting them to join. Give them some background on the purpose of the network and how their participation is important. Then, when they get an invitation from Clearvale, they will feel more comfortable about joining.
- Encourage your new members to set up their profile.
- Encourage your network members to join communities. If you want, you can encourage them to create communities as well.
- Encourage your new network members to customize their notification settings.
- Encourage network members to follow the colleagues with which they work closely. This expands their activity stream to include relevant content and updates.
- Encourage new members to share content with other network members.
- Encourage new members to use the **Help** link for information on using Clearvale.
- Use email to facilitate Clearvale use as needed. You may find at first that you need to use email to get your team up and running on Clearvale. However, once your members are customized to checking their Clearvale network for relevant information, using email will be less important.