



# Traction User Guide

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# Traction User Guide

## ***Traction User Guide***

Doc357: April 29, 2008 11:32 AM, Posted by Christopher Nuzum, Edited by Jordan Frank

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## ***Introduction to the Traction User Guide***

Doc146: March 22, 2008 4:06 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

This brief guide provides orientation for the new Traction® TeamPage™ or Traction® TeamPage5 user. After reading this guide, you will understand how to login, navigate, search, post new articles, make comments, and work with labels.

The major differences between the TeamPage and TeamPage5 products are the number of projects and named user accounts supported. (See [www.tractionsoftware.com](http://www.tractionsoftware.com) for more information on the free TeamPage5 product.)

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## ***What can I do with Traction TeamPage***

Doc326: March 22, 2008 4:26 PM, Posted by Documentation Importer, Edited by Jordan Frank

Traction TeamPage is a very flexible social software platform built for enterprise users and groups. Accordingly, uses are as limitless as the range of tasks and priorities of the knowledge worker.

### **Basic Skills**

At the core, there are 4 key skills you need to publish to and manage information in Traction.

1. **Post** an article: You might want to share a thought, an email, text from a web page or a file.
2. **Comment** on an article: Click to add a comment to an existing article
3. **Link**: When commenting or posting, link to one or more existing Traction articles.
4. **Label/Tag**: Apply a label or labels to Traction articles.

Later in this guide, you will learn each of these skills. This is a simple set of activities that can be applied to any number of use cases or applications of the Traction platform.

### **Use Cases**

Whatever your role, Traction will free you from the aches and pains of managing qualitative information and communicating effectively and efficiently with small or very large teams or stakeholder groups. Below are some examples of popular use cases include. You may also enjoy review the [Customer Stories](#) on our website to read about some real life examples.

- **Competitive Intelligence and Market Research:** Use Traction to collect, organize and selectively distribute information from all sources. Provide your own commentary, reports and analysis with links to the sources captured in Traction.
- **Product Management:** Use Traction to collect customer feedback, market research, bug reports, and product or feature ideas. Then define features, assign them to versions, mark them To Do and give them priority. Traction can help manage the features or bugs through a process to completion.
- **Program Management:** Use Traction to define and track program objectives, serve as a communication hub for reports and issue alerts, provide critical information resources to small and

large teams on a timely, highly available basis. Traction is also an effective way to label and track issues identified, to be sure they are kept "at the surface" until marked closed or done.

- **Research Lab Notebook:** Whether doing drug research or product research and development, use traction to document and organize your ideas, issues, Q&A, and findings. Traction's robust audit trail will assist collective understanding and document timing and evolution of ideas.
- **Online Documentation:** Use Traction to create "wiki-style" documentation for internal or external use. Traction makes it easy for a group of people to work together to create a set of articles linked by unique page names. Authoring rights can be separated from publishing rights, with articles remaining in a draft state until published. This allows readers to be presented with a "latest stable" version of the documentation while revisions are ongoing. See [Concepts of Wiki Projects](#) for more information.
- **Customer or Partner Communication:** Create a project in Traction for a key account or partner. This becomes the secure space for communicating, reporting, and sharing information between the two organizations. You can expose the customer or partner to their project as well as others that are relevant, such as a Support or Market Research project.
- **Customer Support:** Create a secure or public project in Traction to post information relevant to all your customers or partners. This is an effective way to post and organize FAQs, company updates, and important resources. You may also take questions and comment answers in this space.
- **Operations Log:** Use Traction to capture activity information in daytime or 24 hour operations. This is highly appropriate for cases where activity and issues raised need to be transparent (but secure) to stakeholders, and where information can get lost in the reporting shuffle between shift operations. Examples may include an emergency room log, ship's log, manufacturing log.
- **Company Newsletter:** For internal and external distribution. Post news and events to Traction. Let Traction automate the publishing and newsletter generation process.
- **Personal Weblog:** A very public or very private place to capture your thoughts, ideas, and collected information. Traction provides a robust set of labeling and other tools to effectively organize your knowledge and, where and how appropriate, share with others.

This user guide focuses on how to navigate, search, publish to, and interact with Traction. It does not discuss how to use Traction for a particular use case, such as those mentioned above.

If you are a user of an existing Traction server, navigate around to see how it is being used in your organization, or contact your administrator or project manager for direction as needed.

## ***How is information organized in Traction TeamPage***

Doc134: March 22, 2008 4:04 PM, Posted by Documentation Importer, Edited by Greg Lloyd

The basic units of organization in Traction TeamPage are *project (spaces)*, *entries (articles, comments, pages)*, *labels (tags)* and *time*. Wiki Page Names (which may be assigned to Entries) and Relationships ("this comments on that" or "this e-mails that") are also important to how information is displayed and linked together.

Entries (including comments) are the content stored in project spaces, to which labels are attached. Entries can be shown in creation time order (like a blog), or linked together by name and shown as a web of pages (wiki style).

A TeamPage server may have any number of project spaces. A project may be referred to as a space, a

blog or a wiki. Best practice generally creates project a workspace scoped to a group of people with a common interest (for example, Engineering) and with common permissions applied for reading or sharing that information with a wider group (including the general public) . Each person may have their own unique permissions in a project (author, comment, edit, erase, and so forth).

You post entries (referred to as *articles*, *pages* or *comments* depending on how they presented and used) to a Traction project and you may apply any number of labels from that project or any other project where you have author or change label permissions.

Articles may be assigned relationships to other articles. Most relationships are generated automatically. For example, when you make a link from one article to another, it creates a *References/Referenced By* relationship and when you comment it creates a *Comments On / Commented On By* relationship.

An Article is posted to a given project and minimally consists of a Title and Body Text. It may also have Attachments, Labels and Wiki Page Names. Other meta-data includes the author, the editors, the date/time it was posted or edited and the references to it or from it.

An article is not much different from an email message, with a title, body and attachment(s). The articles you post are delivered to a browser through Traction's interactive web interface as well as through the automated email digest, RSS or Atom feeds, synchronous email notification, and other methods.

The Front Page and Project Newspages include [sections](#) which display the content. The sections typically help the reader see what's important (over all time as well as right now) and, if they include the Add button, encourage the reader to collaborate in a certain way (e.g. a Status Report section begs the reader to Add a Status Report).

The server or project administrator may use very few sections (a wiki style project might just use one section that shows one page (see [Concepts of Wiki Projects](#)) or they might use a lot of sections, to provide a sort of Dashboard or Newspaper style interface. Sections can display any cross-section of content in Traction, and can be sorted chronologically, alphabetically or even at random!!

Why use sections? Think of how a newspaper works. A newspaper layout is a time-tested way to present and distribute information in context and over time. It provides the reader with a way to rapidly read information by priority (a front page that features the most important and most recent content) and by subject of interest (for example sports, business, life, and arts sections, each with their own priority driven delivery and topic based organization).

Like a newspaper, Traction has a front page and a list of projects, each with its own *newspage*. Depending on your permissions, you will see a custom view of the system and get a customized, permission filtered email digest.

The sections which appear on the front page and the project newspages are configured by the server and project administrator. For example, a section may simply display recent articles, show the most recent 3 articles with the *Headline* label, show a specific collection of articles, or list articles labeled *FAQ* alphabetically.

The example below, taken from the starter journal that ships with Traction, shows a *Front Page* view with *headlines*, and *recent entries* in the body. Projects you can read are listed on the left sidebar, and date navigation is handled through the calendar in the right column allowing you to traverse any view over time periods.

The *Headline* label is used in this case to raise important information, be it a status report or important question, to a prominent place (in this case, the *Headlines* section) on the front page.

traction

Front Page

» advanced search

Sections

Headlines

Recent Articles

Projects

Engineering (16)

Executive (2)

HR (6)

Intelligence (5)

All Projects » Recent Articles | Recent Comments | All Recent

HEADLINES

**Welcome to the Starter Journal - Read this First**

Thanks for trying Traction. This journal may provide a good place to start, since it includes projects (group blogs) for teams typically found in any organization. You can modify this journal by adding new Traction blogs for groups in your organization (you can also turn off the starter projects), or create a new journal from scratch whenever you like. Sample content has been loaded into each project and some setup options have been used to configure each project to give you a jump start and a few examples. *Please click the title of this article to read more. ...*

admin / Engineering0 / September 27, 2005 / 2:32:18 PM EDT / 0 Comments

RECENT ARTICLES

**Intelligence Ethics Bulletin**  
admin / Intelligence4 / July 14, 2006 / 10:42:22 AM EDT / 0 Comments

**Sample Intelligence Analysis on Apollo Objective**  
admin / Intelligence3 / July 14, 2006 / 10:34:25 AM EDT / 0 Comments

**Sample HUMINT on Apollo Objective**  
admin / Intelligence2 / July 14, 2006 / 10:33:54 AM EDT / 0 Comments

**Sample Intelligence Question**  
admin / Intelligence1 / July 14, 2006 / 10:29:18 AM EDT / 0 Comments

**Sample "Apollo" Intelligence Objective (or KIT)**  
admin / Intelligence0 / July 14, 2006 / 10:26:36 AM EDT / 0 Comments

**Sample Executive Meeting**  
admin / Executive2 / June 6, 2006 / 4:18:59 PM EDT / 0 Comments

**Sample Executive Idea, cross labeled to Engineering**  
admin / Executive0 / June 6, 2006 / 4:12:58 PM EDT / 0 Comments

**What is a Bulletin?**  
admin / Engineering53 / June 6, 2006 / 4:06:14 PM EDT / 0 Comments

**Frequently Asked Questions**  
admin / Engineering47 / June 6, 2006 / 3:57:38 PM EDT / 0 Comments

**re: Does the 401K policy allow for roll-overs**  
admin / HR7 / June 5, 2006 / 11:38:04 AM EDT / 0 Comments

[Read More Recent Articles...](#)

Date Range Selector

Active Years

2005

2006

[Go to Today](#)

Article Tools

[Add New Article](#)

Account

[Server Setup](#)

[Project Setup](#)

[My Account \(admin\)](#)

[My Collector](#)

[Sign Out](#)

Sidebar Shortcuts

This article (Engineering13: Sidebar Shortcuts) is set as the default *Sidebar Article*. Click on the title *"Sidebar Shortcuts"* and edit this article to include useful shortcut links.

You can change the server Sidebar Article in *Server Setup / Defaults* and over-ride it in each project in *Project Setup / Display*.

Shortcut links to Resolved Issues and Questions:

- Resolved Issues
- Resolved Questions

XML Feeds

[RSS Feed](#) | [Atom Feed](#)  
[Click here to learn more](#)

[feedback](#) • [contact us](#) • [help](#)

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Powered By [traction](#)

The vector of time as a means for organization is a way of presenting information in context and keeping people abreast of events as they are happening. Traction views are based on a period of time – such as a

week, month, or year – that you can select, jump to, or flip through, like the editions of a monthly magazine. You can also choose a view of all time which is the default, and is easier on users than starting in a selected time slice.

By default, content searches look across all time, but you can narrow your focus using the Advanced Search form.

Note: As time passes, entries can get buried under the latest articles. By using labels (see below to learn about labels) and creating newpage sections with lists of links, it is possible to keep open issues or key resources at the *front page* or *newpage* level.

## What is a Project?

Projects might be subject based (Competition), a group of people (StarCustomer or ProductAlpha), or named for the person who owns that project (to create a personal workspace or blog). Each project has its own set of permissions defining who can read articles, create articles, edit articles, change labels on articles, define new labels, erase articles, and access project setup.

Note: An article posted to one project is not confined. You can extend read permission to users in other projects by assigning it a label/tag from another project. Learn how to do this in the Publishing section.

## What are Labels (tags)?

Think of Traction labels like the tape flag labels you can stick to any paragraph in a paper document to flag key items for information or action.

In most products, labels (or similar concepts like tags, categories, or even folders) are generally used to organize by category. In Traction, labels may be used more creatively. Labels can be applied to a whole article, or any paragraph within an article for purposes of:

- Description (Pricing, competition, interface, knowledge management, humour)
- Action Status (To Do, Done, Delay, Duplicate)
- Emphasis of priority (Headline, Alert, Priority 1, Priority 2)
- Type of post (Issue, Question, Requirement, Milestone, Status)
- Assignment to a milestone (Alpha, Beta, FCS, R40) or to a person (manager:jordan)

Because traction page sections, searches and drill down navigation allow for dynamic views, you can use labels in combination. For example, to track an issue, you might label it To Do, Competition, and Priority 1. A product requirement could be labeled Interface, Release 2, To Do, Priority 2 and Requirement.

Depending on the project and front page settings determined by your administrator, labels may have the effect of elevating articles to a position on the *front page* and project *newspages* (rather than only being listed in Recent Entries).

The News project template, for example, includes the following labels with the following effects:

- headline labels, for example, make the most recent articles marked headline appear on the top section of the corresponding project *newspage* and the *front pagetoo*.
- to do and done labels make articles appear in the Recent To Do and Recently Done sections of the project news page. These sections display content based on the date the label was applied rather than the date the article was published. So, if you mark an old task Done today, it will display at the top of the list today.
- bulletin label will make an article appear in the Bulletins section regardless of the time period selected. You could navigate your calendar back to the 1800s and the Bulletins section of the project will still appear!



The Project Team project template has these labels as well as team oriented labels and corresponding sections such as Issues To Do, Questions To Do, Meeting Notes, and Status Reports.

Using Labels to Extend Visibility of an Article to another Project's Audience: Labels can also be used to make an article in one project visible to a new group of users by applying a label from a different project. For example, if an Article is in a project named Executive, applying a headline or FYI label from the Engineering project would make it visible to persons who are allowed to read articles in the Engineering project, in addition to people who are allowed to read articles in the Executive project. NOTE: This will only work for the readers of Engineering who also have Access permission in the Executive project. The Access permission is a bit like a firewall around a project.

## **Search Allows you to Scope to Any Cross-Section**

You can filter Traction views by project(s), label(s), author(s), time range, and text. Search supports boolean combinations and paragraph matching. You may also search across views ordered by when labels were added, rather than the publish date of the article to which it was added. For example, you may want to see which articles were marked Done last week.

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## ***Navigating and Interacting with Traction***

Doc172: March 22, 2008 4:08 PM, Posted by Documentation Importer

Traction has several interfaces or "skins" built to cater to different preferences. This section provides instruction for navigating and interacting with the *Mexico* skin which is the new default as of Release 3.7. The [Traction Skins](#) section of this guide provides instruction on how to change skins and discusses the alternate Ocean, Earth, 2col, 3col, Basic, Modern, News, Simple (for mobile devices), RSS/Atom and Search skins.

This section familiarizes you with the view types available in the Mexico skin and then discusses printing, search, commenting, and the email digest.

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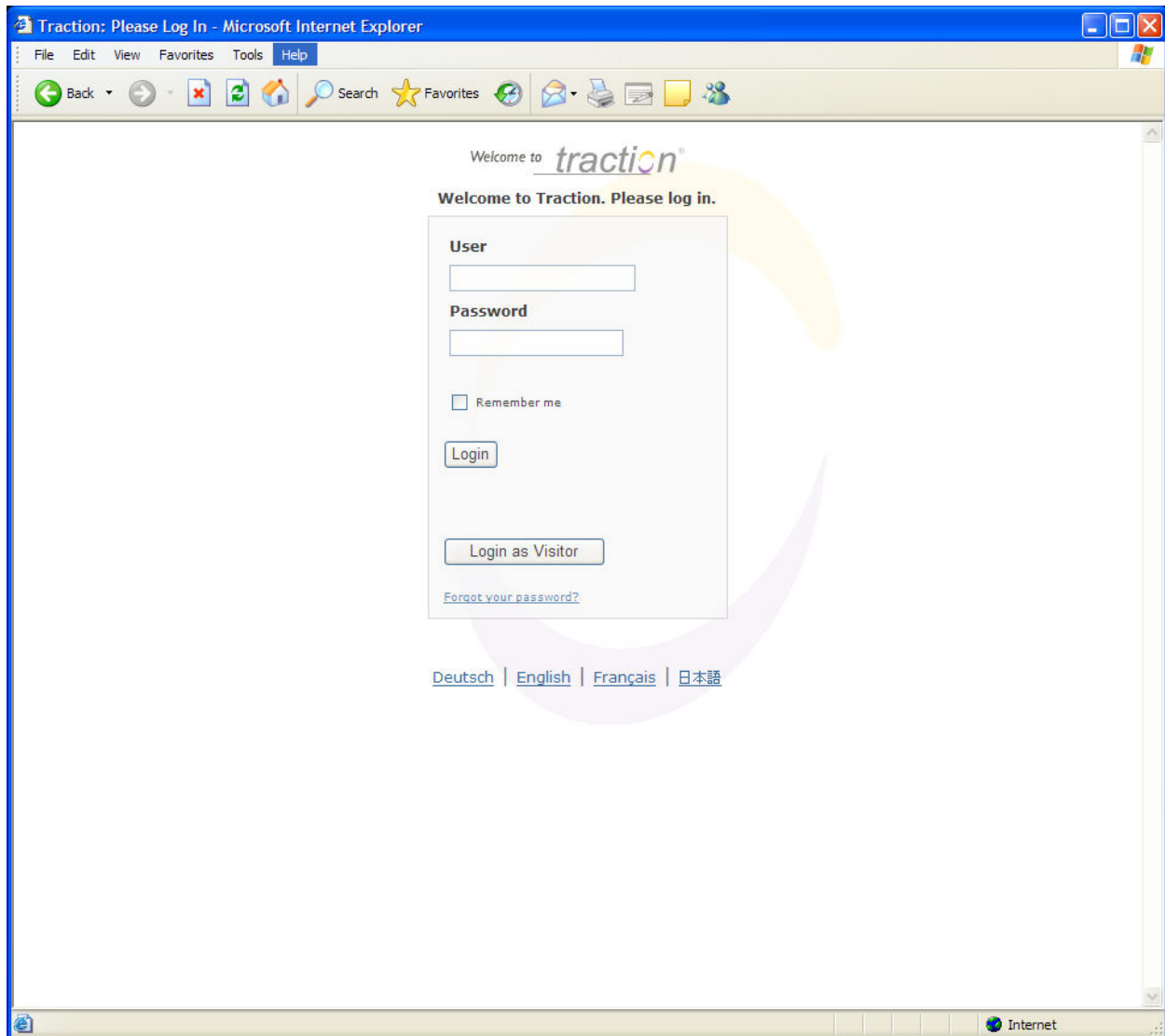
## ***Logging in and Setting Your Password***

Doc161: March 22, 2008 4:07 PM, Posted by Documentation Importer

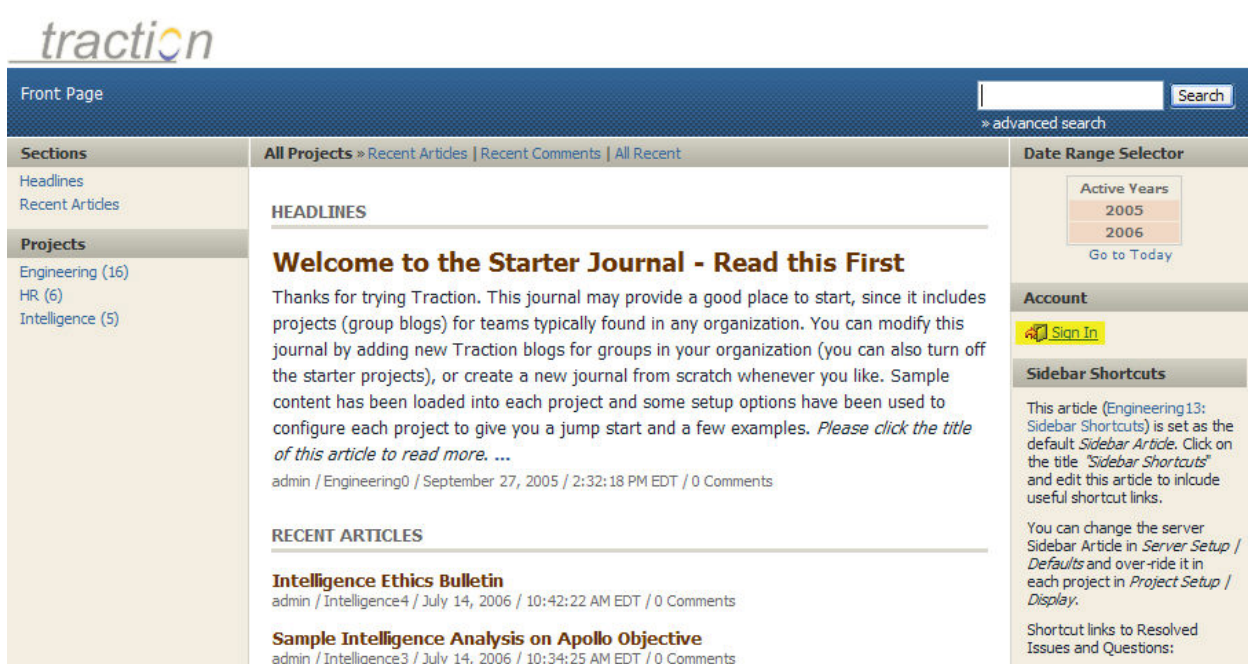
**Note:** This section does not apply if your server is configured to use NTLM with Active Directory, in which case your login should be automatic.

When your Traction account is created, your administrator may provide you a URL, a username, and, optionally, an initial password. Click the URL to get to the Traction server.

You will either be presented with a login form (shown below, if Visitor is not enabled on your server) or with the *Front Page* as it would appear to a Visitor with no permissions.



If you are presented with the *Front Page*, click the Sign In link in Account tools which appear in the right column:



The screenshot shows the Traction software interface. At the top is the 'traction' logo. Below it is a navigation bar with 'Front Page' and a search box. The main content area is divided into several sections:

- Sections:** Includes links for 'Headlines' and 'Recent Articles'.
- Projects:** Lists 'Engineering (16)', 'HR (6)', and 'Intelligence (5)'.
- HEADLINES:** Features a prominent article titled 'Welcome to the Starter Journal - Read this First' with a detailed description and a link to read more.
- RECENT ARTICLES:** Lists two articles: 'Intelligence Ethics Bulletin' and 'Sample Intelligence Analysis on Apollo Objective'.
- Sidebar:** Contains an 'Account' section with a 'Sign In' button and a 'Sidebar Shortcuts' section with instructions on how to change the server Sidebar Article.

In the login form enter your username and password into the fields, then click the *Login* button. The password field is case-sensitive.

If you have not been given a password, try leaving the password field blank or following the instructions in [What if you Forget Your Password](#)

If you do not have a *username* and *password*, you may click *Login as Visitor* if the option is present, or contact your administrator.

Login as Visitor

## Remember Me?

Check the remember me box if present to avoid signing in again after you close your browser.

☒ Remember me

Once you log on, you may be required to choose a password. If you see this screen, type your new password in each field and press the apply button in the lower right. This will take you into Traction.



The screenshot shows a web interface for 'demo' personal setup. The top navigation bar includes 'Personal Information', 'Preferences', 'Password', and 'Permissions'. The 'Password' tab is selected. A message box states: 'Before you proceed, you must change your password. You may also choose to logout.' Below this message are two text input fields labeled 'New Password' and 'Confirm New Password'. At the bottom of the page, there are three buttons: 'exit', 'back', and a checkmark icon.

## ***What if you Forget Your Password***

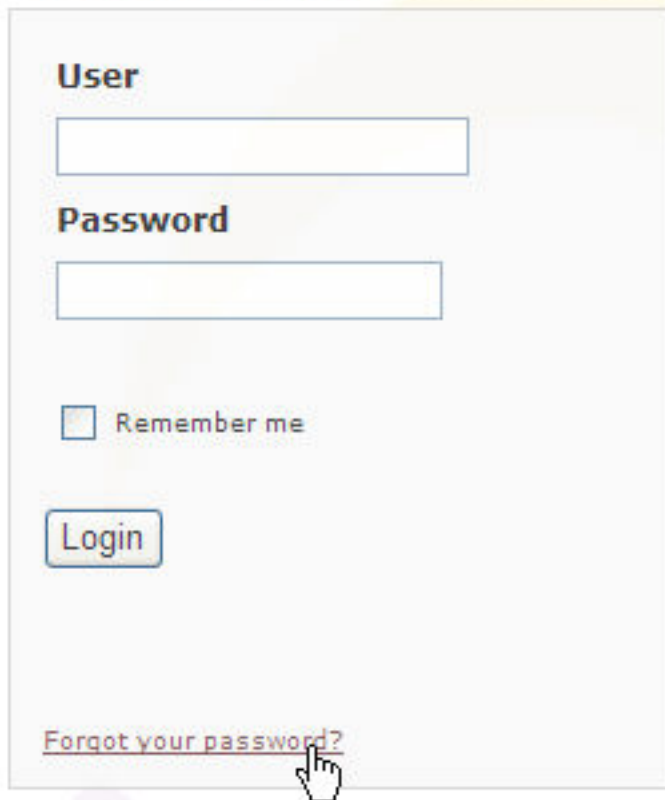
Doc327: March 22, 2008 4:26 PM, Posted by Documentation Importer, Edited by Greg Lloyd

If you forget your password, you can request that Traction sent you a password change link. This link will enable you to change your password for up to one hour. After an hour, you need to request a new link.

The *Forgot your Password?* link on the login form is shown below.

Welcome to 

**Welcome to Traction. Please log in.**



The login form is a light gray rectangular box. It contains the following elements from top to bottom: a label 'User' in bold, a text input field, a label 'Password' in bold, another text input field, a checkbox labeled 'Remember me', a 'Login' button, and a link 'Forgot your password?' at the bottom. A mouse cursor is pointing at the 'Forgot your password?' link.

[Deutsch](#) | [English](#) | [Surfer](#) | [Français](#) | [日本語](#)

Clicking this link expands the view to show a box where you can type either:

- Your Traction account name.
- An email address associated with your Traction account.

Welcome to **traction**<sup>®</sup>

Welcome to Traction. Please log in.

User

Password

☐ Remember me

Login

[Forgot your password?](#)

Enter Username or Email address

cjn@tractionserver.com

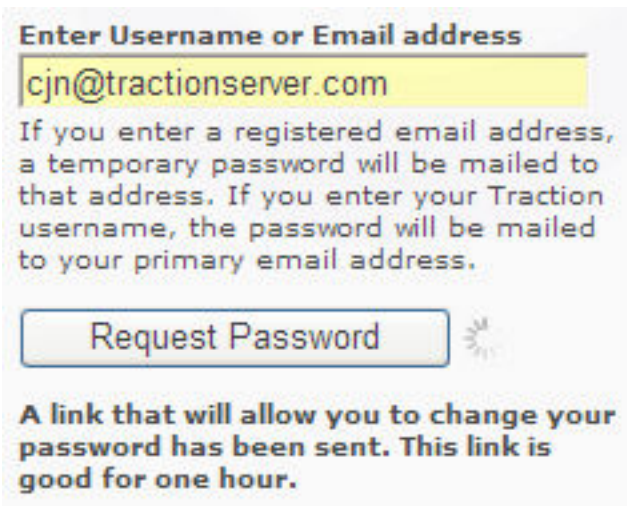
If you enter a registered email address, a temporary password will be mailed to that address. If you enter your Traction username, the password will be mailed to your primary email address.

Request Password

[Deutsch](#) | [English](#) | [Surfer](#) | [Français](#) | [日本語](#)


If your account has an associated email address, or the email address has an associated account, you

will see the message:



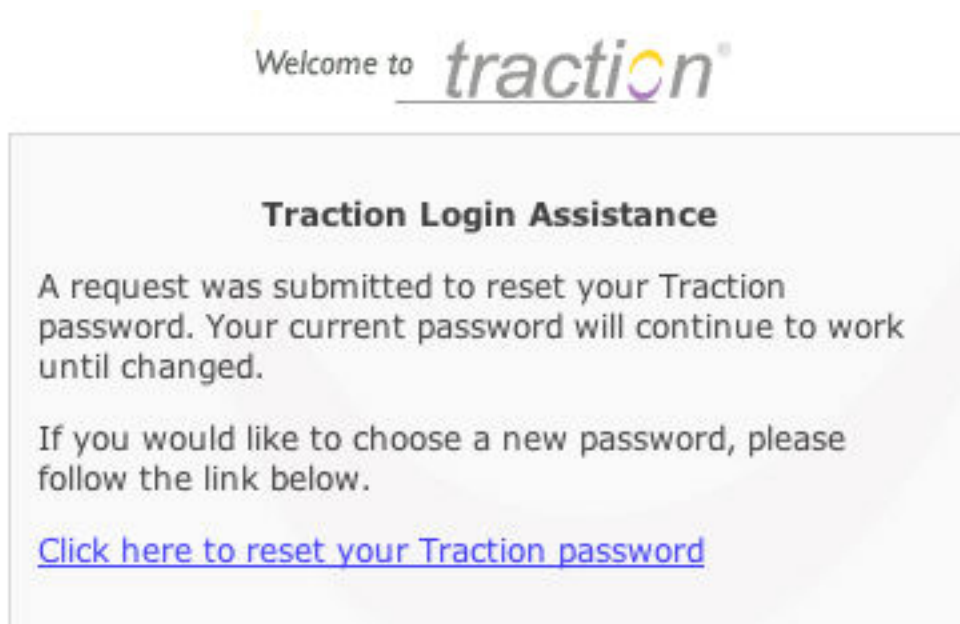
**Enter Username or Email address**

If you enter a registered email address, a temporary password will be mailed to that address. If you enter your Traction username, the password will be mailed to your primary email address.



**A link that will allow you to change your password has been sent. This link is good for one hour.**

You should then get an email that looks like this:



If your mail client does not support HTML mail, you may instead see a link like this:

A request to reset your Traction password was received. If you would like to change your password, please go to the URL: [https://tractionserver.com/traction/post?proj=\\*&sdate=20050503&type=resetpassword&key=HKUXC%2d6E23L&user=cjm](https://tractionserver.com/traction/post?proj=*&sdate=20050503&type=resetpassword&key=HKUXC%2d6E23L&user=cjm)

This will take you to a page that will let you enter and log in with a new password:

 **Reset Password for admin**

Welcome to **traction**<sup>®</sup>

This view will let you choose a new password. Once you choose a new password, your old password will be disabled.

**Enter New Password**

**Confirm New Password**

☒ Remember me

Once you log in with the new password, your old password will be disabled.

## Notes

- This feature is not supported when all Traction authentication is handled by an external system.
- This feature can be disabled by the Traction server administrator.
- This feature is not available if outgoing SMTP email is not configured on the Traction server.
- In order to use this feature, you must know either your Traction account name or an email address associated with a Traction account. If no email address has been associated with the account, you will need to contact a Traction server administrator to either associate an email address or reset your password.

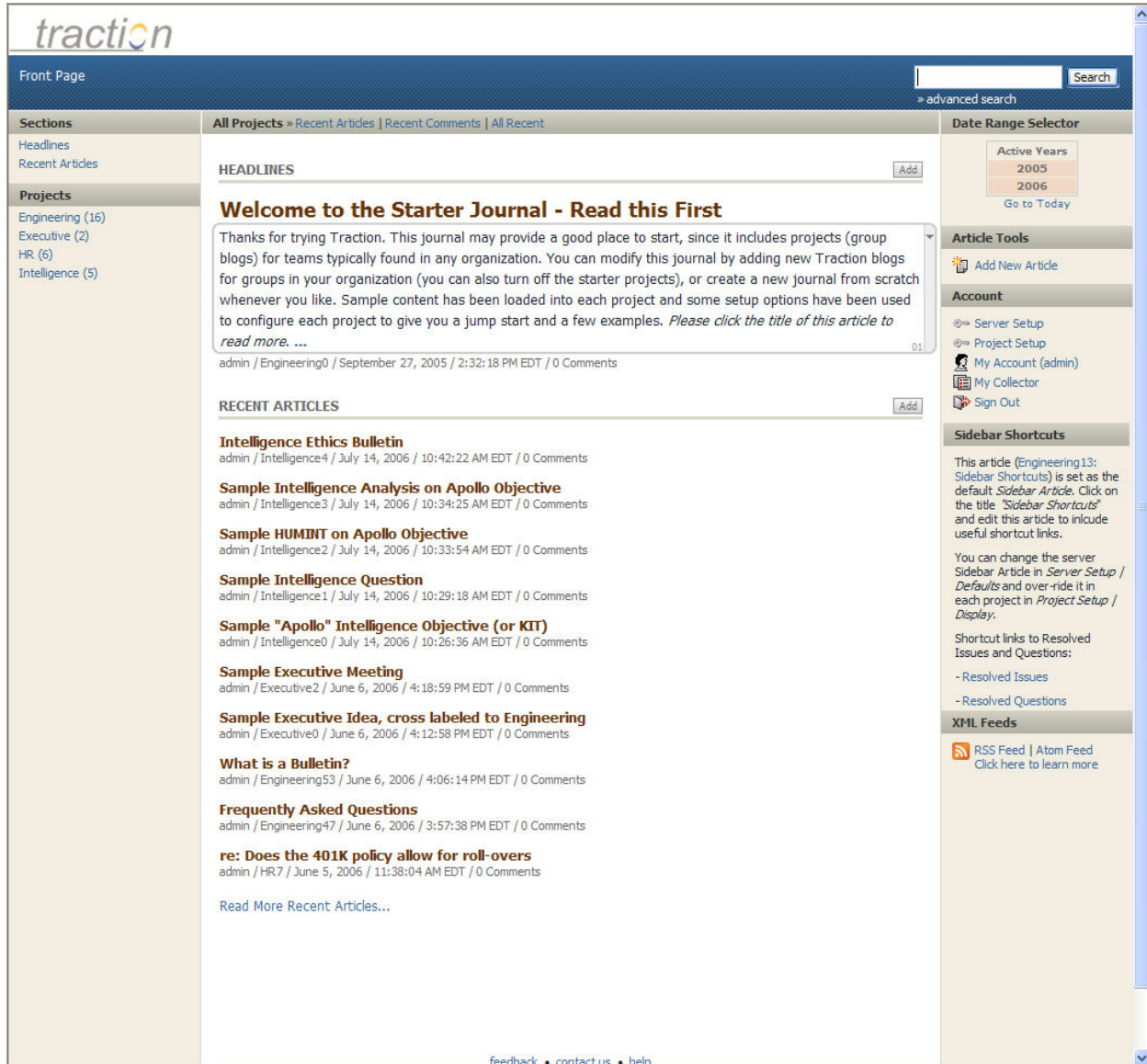
## Navigating the Interface - In the Mexico Skin

Doc175: March 22, 2008 4:09 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

The *Mexico* skin is the default Traction skin as of Release 3.7. Like most Traction skins, it consists of five primary view types: the *front page*, the *project newspage*, the *single-entry*, the *multi-entry*, and the *search result views*. This topic provides an introduction to each view type.

## Front Page

The *Front Page* is a roll-up of information posted to all projects for which you have read permission. It is your typical launching point into Traction.

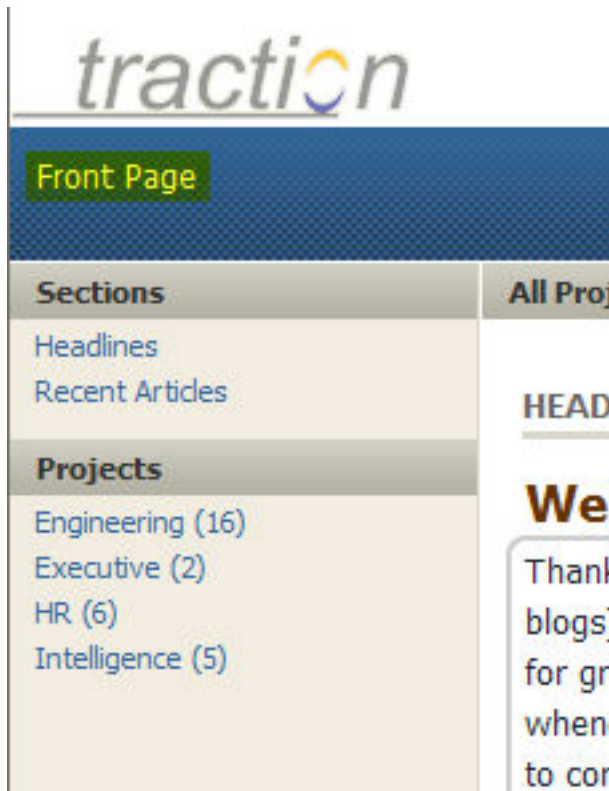


The screenshot shows the Traction Front Page interface. At the top, there's a navigation bar with the Traction logo and a search box. Below this, a sidebar on the left lists sections like Headlines, Recent Articles, and Projects (Engineering, Executive, HR, Intelligence). The main content area is divided into sections: HEADLINES, RECENT ARTICLES, and a sidebar on the right with Date Range Selector, Article Tools, Account, and Sidebar Shortcuts. The HEADLINES section features a welcome message and a list of recent articles. The RECENT ARTICLES section lists various articles with their titles, authors, and dates. The sidebar on the right provides additional navigation options and information.

## The Header

## The Locator

The locator in the top left says you are on the Front Page. The locator is sometimes referred to as a "bread crumb".



When you click into a project or [article](#) Consists of a Title, Text, Attachments and Labels, the locator expands. For example, if you are in the 5th article in the HR project, the *locator* will read:

*frontpage > HR > 5*

See the example below, showing the locator that matches the *Traction ID* (HR5), as presented under the title of the Article:



Front Page > HR > 5

<b>Projects</b> <a href="#">Engineering (16)</a> <a href="#">Executive (2)</a> <b><a href="#">HR (6)</a></b> <a href="#">Intelligence (5)</a>	<b>HR</b> » <a href="#">Recent Articles</a>   <a href="#">Recent Comments</a>   <a href="#">All Recent</a>
---	--

**Recruiting and Hiring Policy**  
 HR5 | June 5, 2006 | 11:35:25 AM EDT  
 Posted by admin

All new hires and promotions must go through the

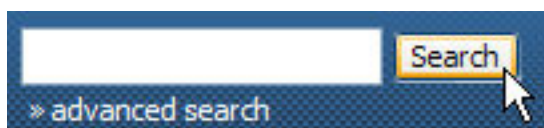
1. Call for internally sourced promotions or job ch
2. Call for external new hires

**HR**  
**Sections**  
**Labels**  
[bulletin](#)  
[done \(1\)](#)  
[FAQ \(1\)](#)  
[FYI](#)

You can always click on the *Front Page* link in the bread crumb to return to the *Front Page*, or in this case you can also click the HR link in the locator in order to go to the HR *Project Newspaper*.

## The Search Box

The **search box** in the upper right lets you type a search or a [Introduction to the Rapid Selector Guide](#) command. *Rapid Selector* commands let you enter complex searches and navigate to any view in Traction with just few keystrokes.



## The Front Page Body

The main body of the Front Page shows the contents of the Front Page sections defined by the administrator in Server Setup. In this example:

The **Headlines** section shows the most recent articles from any project you can read that are marked with the corresponding *headline label*. The section displays the article title and first paragraph (the Brief view) and it displays article details including the author, Traction ID, the publish date, the publish time (in your selected time zone) and how many comments are on the article.



## HEADLINES

Add

### Welcome to the Starter Journal - Read this First

Thanks for trying Traction. This journal may provide a good place to start, since it includes projects (group blogs) for teams typically found in any organization. You can modify this journal by adding new Traction blogs for groups in your organization (you can also turn off the starter projects), or create a new journal from scratch whenever you like. Sample content has been loaded into each project and some setup options have been used to configure each project to give you a jump start and a few examples. *Please click the title of this article to read more. ...*

admin / Engineering0 / September 27, 2005 / 2:32:18 PM EDT / 0 Comments

The **Recent Articles** section, displays most recent articles and comments, including title and article details

## RECENT ARTICLES

Add

### Intelligence Ethics Bulletin

admin / Intelligence4 / July 14, 2006 / 10:42:22 AM EDT / 0 Comments

### Sample Intelligence Analysis on Apollo Objective

admin / Intelligence3 / July 14, 2006 / 10:34:25 AM EDT / 0 Comments

### Sample HUMINT on Apollo Objective

admin / Intelligence2 / July 14, 2006 / 10:33:54 AM EDT / 0 Comments

### Sample Intelligence Question

admin / Intelligence1 / July 14, 2006 / 10:29:18 AM EDT / 0 Comments

### Sample "Apollo" Intelligence Objective (or KIT)

admin / Intelligence0 / July 14, 2006 / 10:26:36 AM EDT / 0 Comments

### Sample Executive Meeting

admin / Executive2 / June 6, 2006 / 4:18:59 PM EDT / 0 Comments

### Sample Executive Idea, cross labeled to Engineering

admin / Executive0 / June 6, 2006 / 4:12:58 PM EDT / 0 Comments

### What is a Bulletin?

admin / Engineering53 / June 6, 2006 / 4:06:14 PM EDT / 0 Comments

### Frequently Asked Questions

admin / Engineering47 / June 6, 2006 / 3:57:38 PM EDT / 0 Comments

### re: Does the 401K policy allow for roll-overs

admin / HR7 / June 5, 2006 / 11:38:04 AM EDT / 0 Comments

[Read More Recent Articles...](#)

You can click the section heading "Headlines" to go to a view of all articles matching the requirements of the section (in this case, including the Headline label from any project). The same rule applies for any

section; clicking the heading "Recent Articles" will take you to a view of all articles and comments in all projects you can see.

Assuming you have Author permission in at least one project, the Add button will appear and you can click it launch an Add New Article form which will publish content into the corresponding section. In the Headline's case, the Add New Article form will have the Headline label already chosen.

*Note: the person who has server setup permission can add sections, remove and change the default sections, add and remove sidebar entries, and change other page defaults, so what you see may differ from the organization as presented in this help guide.*

At the bottom of the page there is a *Feedback* link that will allow you to fill out and send us a feedback, feature suggestion, or bug report which will include your system information, a *Contact Us* link to send us an email, and a *Help* link which will return you to this guide.

[feedback](#) • [contact us](#) • [help](#)  
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Powered By 

## The Front Page Right Column

The right column shows the date range selector, tool links, account links, the sidebar article, and links to RSS and Atom versions of the current page.

### Date Range Selector

Active Years

2005

2006

Go to Today

### Article Tools

 [Add New Article](#)

### Account

 [Server Setup](#)

 [Project Setup](#)

 [My Account \(admin\)](#)

 [My Collector](#)

 [Sign Out](#)

### Sidebar Shortcuts

This article ([Engineering13: Sidebar Shortcuts](#)) is set as the default *Sidebar Article*. Click on the title "[Sidebar Shortcuts](#)" and edit this article to include useful shortcut links.

You can change the server Sidebar Article in *Server Setup / Defaults* and over-ride it in each project in *Project Setup / Display*.

Shortcut links to Resolved Issues and Questions:

- [Resolved Issues](#)
- [Resolved Questions](#)

### XML Feeds

 [RSS Feed | Atom Feed](#)  
[Click here to learn more](#)

The **date range selector** is a calendar navigator which tells you which *timeslice* is selected, indicates on which dates information in the current view has been posted, and allows you to navigate back and forth through time. Every character or word on the calendar is a link and will change your selected *timeslice*.

The default timeslice (which your administrator may override) is all time. In the example below, you can see that the selected *timeslice* is all time. As we are on the Front Page view, the date range selector is showing us that there is content in projects you can see which was posted in the years 2005 and 2006.



If you click 2006, the calendar will show you the months in bold (February, May, June and July) where content was posted in that year:



If you click on June, the calendar will show you the days in bold (5th and 6th) when content was posted in that month.

Date Range Selector

« JUNE 2006 »

S	M	T	W	T	F	S
» 28	29	30	31	1	2	3
» 4	5	6	7	8	9	10
» 11	12	13	14	15	16	17
» 18	19	20	21	22	23	24
» 25	26	27	28	29	30	1

Go to Today

Now that we have gone back in time to a timeslice preceding another timeslice (July) where there was activity, the Recent Articles section on the front page (because it is time ordered) will only reflect new articles and comments as of the end of June 2006.

## RECENT ARTICLES

Add

### Sample Executive Meeting

admin / Executive2 / June 6, 2006 / 4:18:59 PM EDT / 0 Comments

### Sample Executive Idea, cross labeled to Engineering

admin / Executive0 / June 6, 2006 / 4:12:58 PM EDT / 0 Comments

### What is a Bulletin?

admin / Engineering53 / June 6, 2006 / 4:06:14 PM EDT / 0 Comments

### Frequently Asked Questions

admin / Engineering47 / June 6, 2006 / 3:57:38 PM EDT / 0 Comments

### re: Does the 401K policy allow for roll-overs

admin / HR7 / June 5, 2006 / 11:38:04 AM EDT / 0 Comments

Note: Sections like Headlines and Recent Articles which show views of content in a time ordered view may have a Minimum setting. If there is a Minimum setting, and there is no content in the selected timeslice, the section will display the Minimum number of articles and comments from previous timeslices.

In order to go back to the current timeslice, you can do any of

- (1) click on the Go To Today link (which will bring you to a month timeslice view of the current month)
- (2) click on the right double arrow to page forward month by month or
- (3) click the year 2006 to return to the full year view.

The available **Tools** on the *Front Page* include *Add New Article* (button is on the grey bar at the top right). The available tools will vary depending on your view. Many more (like edit, comment, email articles, and print) will appear in a single-entry or multi-entry view.



The Account section in the right column provides links that allow you to go to [Server Setup](#) and [Project Setup](#) (if you have permission to either), [Personal Setup \(My Account\)](#) [The Collector](#), and Sign Out.



The **Sidebar Article** is the area below the account tools which (in the example) is titled "*Sidebar Shortcuts*". The sidebar article is just an Article in Traction, but has been promoted to appear in this position. It is an easy way to customize this part of the right navigation to include helpful links which users may want in all views. Your administrator may or may not have defaulted the *Front Page* and *Project Newspages* to show a sidebar article.



The XML Feeds section in the right column provides the links to **RSS** and **Atom** feeds for *this view*. The view, in this context, is the Front Page which includes all projects and will deliver all content from all projects which you can see.

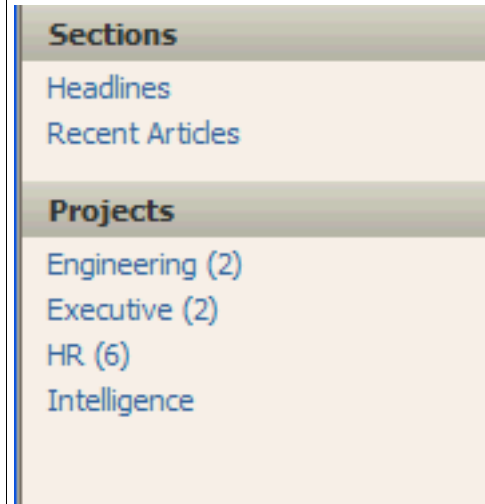
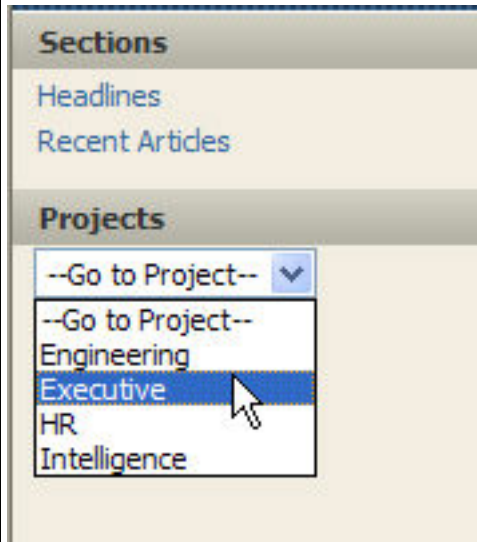


XML Feeds from Traction are dynamic and permission filtered. If you hand me the RSS or ATOM link, I may get a different result based on my permissions. If you are in a multi entry view, a search view, or a project newpage, then the XML feed links from that view will provide a feed of that view specifically.

You can copy these links into an RSS readers to receive a syndicated XML feed from the selected view. You can click either feed button to see an HTML view of the feed that is browser friendly. Your RSS reader would, instead, receive the XML format.

## The Front Page Left Column

The left column lists the Front Page sections (if section links are enabled by your administrator) and gives you access to the list of projects you can read. Depending on your preferences and server settings, you may see a list of all projects or a pulldown "jump menu" listing the projects.

	
<p>Default display: list of projects, indicating number of articles and comments for each in the current timeslice</p>	<p>Jump menu (shown expanded). Choose a project to jump to that project's Newpage.</p>

Clicking on a project will take you to the project's newpage.

The front page **section links** match the sections on the body of the front page. In this case, they include



*Headlines and Recent Entries.* Your server administrator may have removed these or created new sections.

Note that the default sections in the body of the Front Page show the *most recent* entries for each section, sometimes drawing upon content posted prior to the selected timeslice if the administrator set a Minimum on the section. When you click the link, you will see the section's entries *for the selected time period*. Sections may be defined to show a minimum number of entries. If there are not enough entries in the current time period, the section may show entries in an earlier period. If this is the case, clicking a section link, which shows the current period, may lead to a page with no entries.

## ***Project Newspaper***

The *Project Newspaper* allows you to view content relating to a specific project or topic. In the example below, we clicked on the Project name Executive in the left navigation.

Similar to the Front Page, whose sections can be defined by the server administrator, Project Newspaper sections can be configured for each project by that project's administrator.

In the Executive project example below, there are several sections, though some don't have content.

You will notice that the locator is updated to show your location (Front Page > Executive > Newspaper) and the calendar may now show different dates (only the year 2006) in bold, to correspond to the content which has been posted to this specific project.



Front Page > Executive > Newpage

» advanced search

Projects

Engineering (7)

**Executive (2)**

HR (6)

Intelligence (5)

Executive

Sections

Headlines

Status Reports

Meeting Notes

Issues To Do

Questions To Do

Recent Articles

Bulletins

Recent To Do

Recently Done

Labels

bulletin

done (1)

FAQ

FYI

headline

issue

meeting (1)

question

status

to do (1)

On This Page

done (1)

meeting (1)

to do (1)

Executive » Recent Articles | Recent Comments | All Recent

Executive Newpage

Go to the Project Setup | Description Tab to edit this text block. The Executive project is a private project for management reporting and collaboration.

HEADLINES

Welcome to the Starter Journal - Read this First

Thanks for trying Traction. This journal may provide a good place to start, since it includes projects (group blogs) for teams typically found in any organization. You can modify this journal by adding new Traction blogs for groups in your organization (you can also turn off the starter projects), or create a new journal from scratch whenever you like. Sample content has been loaded into each project and some setup options have been used to configure each project to give you a jump start and a few examples. *Please click the title of this article to read more. ...*

admin / Engineering0 / September 27, 2005 / 2:32:18 PM EDT / 0 Comments

STATUS REPORTS

Sample Engineering and Executive Status Report

This is a status report for the engineering team. It includes a status label from both the Engineering and Executive projects, so it will show up in the Status Reports section of both Projects.

admin / Engineering4 / September 27, 2005 / 2:49:18 PM EDT / 0 Comments

MEETING NOTES

Sample Executive Meeting

This is a meeting note for the Executive Team. It includes a meeting label adn will show up in the meetings section of this project.

admin / Executive2 / June 6, 2006 / 4:18:59 PM EDT / 0 Comments

ISSUES TO DO

No matching articles

QUESTIONS TO DO

No matching articles

RECENT ARTICLES

Sample Executive Meeting

admin / Executive2 / June 6, 2006 / 4:18:59 PM EDT / 0 Comments

Sample Executive Idea, cross labeled to Engineering

admin / Executive0 / June 6, 2006 / 4:12:58 PM EDT / 0 Comments

BULLETINS

No matching articles

RECENT TO DO

Sample Executive Meeting

1. It is absolutely necessary to tackle Engineering11: Sample Engineering Issue.

2. We need to monitor Engineering39: Testing Unit Delivery Delayed to determine if the delay's impact will have a financial consideration. ...

admin / Executive2 / June 6, 2006 / 4:18:59 PM EDT / 0 Comments

RECENTLY DONE

Sample Executive Meeting

3. We need to find out the answer to Engineering36: How Many Pickles in a Peck?.

admin / Executive2 / June 6, 2006 / 4:18:59 PM EDT / 0 Comments

Date Range Selector

« 2006 »

Q1 Jan Feb Mar

Q2 Apr May Jun

Q3 Jul Aug Sep

Q4 Oct Nov Dec

Show All Years

Go to Today

Article Tools

Add New Article

Account

Server Setup

Project Setup

My Account (admin)

My Collector

Sign Out

Sidebar Shortcuts

This article (Engineering13: Sidebar Shortcuts) is set as the default *Sidebar Article*. Click on the title *"Sidebar Shortcuts"* and edit this article to include useful shortcut links.

You can change the server Sidebar Article in *Server Setup / Defaults* and over-ride it in each project in *Project Setup / Display*.

Shortcut links to Resolved Issues and Questions:

- Resolved Issues

- Resolved Questions

XML Feeds

RSS Feed | Atom Feed

Click here to learn more

Shared Files for Executive

Recent Changes:

Phase Review.doc Aug 23, 2006 12:41:31 PM; by admin

BudgetPlan.xls Aug 23, 2006 12:41:29 PM; by admin

**Sections:** This newpage uses the Project Team section and label template. A few of the sections are worth describing here:

- The Issues To Do and Questions To Do rely on the respective Issue or Question label used with the To Do label. When you check the To Do box to Done, the corresponding Issue or Question will disappear from these sections.
- The Recent To Do and Recently Done label respond to the date when the To Do or Done label was added to the article, rather than the date the article was posted.
- The Bulletins section ignores time and lists articles alphabetically.

## Section Links and Label list

**Section Links:** The section links reflect the sections on the body of the *Project Newpage*. Remember that the sections in the body of the *Newpage* show the most recent entries for each section. When you click the link, you will see all entries for the selected time period... so if you click here you may see

Page 29 of 220

different content or no content at all.

**Label Links:** The Label list shows all labels in the given project. the number next to a label indicates the number of articles or comments where it is used in the selected timeslice. Clicking a label from here (or when you see one on an article) will result in a view of articles and comments which have that label in the selected timeslice. Once in that multi-entry view, you can navigate forwards or backwards in time of course.

In this example, the label *headline* has been applied to 1 article that were posted in the year 2006.


<b>Projects</b>
Engineering (16)
<b>Executive (2)</b>
HR (6)
Intelligence (5)
<b>Executive</b>
<b>Sections</b>
Headlines
Status Reports
Meeting Notes
Issues To Do
Questions To Do
Recent Articles
Bulletins
Recent To Do
Recently Done
<b>Labels</b>
bulletin
done (1)
FAQ
FYI
headline (1)
issue
meeting (1)
question
status (1)
to do (1)

**XML Feeds:** The feed links displayed from the Project Newspaper correspond to XML Feeds of the articles and comments posted to this project.

**Shared Files for Executive:** This link goes to a share folder for the project. Usually, you will attach files to articles. However, sometimes you may want to have a separate share folder for the team. If there are files in the folder, it will display the most recently added files underneath the folder link. .




**Shared Files for Executive**




Recent Changes:










**Phase Review.doc**  
*Aug 23, 2006 12:41:31 PM; by admin*


**BudgetPlan.xls**  
*Aug 23, 2006 12:41:29 PM; by admin*


Click the folder link to open the share folder for the project







**/db/share/executive/**

Open Web Folder
  Exit

		<b>.(current folder)</b>		Sep 27, 2005	2:13:21 PM EDT
		<b>.. (up to share)</b>		Sep 27, 2005	2:13:19 PM EDT
11.5 KB		<b>BudgetPlan.xls</b>		Aug 23, 2006	12:41:29 PM EDT
10.5 KB		<b>Phase Review.doc</b>		Aug 23, 2006	12:41:31 PM EDT

**executive** is a special server-controlled folder. It cannot be renamed or deleted even by administrators.

Create folder:  

Add files:   

(show more rows)

From here you can add or edit files or folders. When you are using Internet Explorer, MS Office files may (depending on admin settings, and whether you have permission to edit share folder) have an Edit button which will launch the file in its native application and allow you to edit it over the web.

Click the icon next to the file to see file details. Files may optionally be set for version tracking which also allows for check out, locking, and check-in.

/db/share/executive/BudgetPlan.xls - Microsoft Internet Explorer

BudgetPlan.xls v1

General Information (Refresh)

BudgetPlan.xls

rename

delete

Name:

Edit in Microsoft Excel

Size: 11.5 KB (11,776 B)  
Modified: Aug 23, 2006 12:41:29 PM EDT

Description:

update description

Location: /db/share/executive/

Open Web Folder

Lock Information

Status: Unlocked

Version Information

#	name	by	checkin date	checkin time
1	BudgetPlan.xls <i>INITIAL VERSION</i>	admin	Aug 23, 2006	12:46:34 PM EDT

Status: File is not checked out.

checkout

You can check out the file to edit it.

You can also click the web folder icon to open this folder up in Windows Explorer.

## Single Entry View

This view shows one article. It also provides context within the article by showing labels in the right margin, comments inline, and a list of *Related Entries* at the bottom. The Related Entries section shows lists of articles which have a relationship to this article. The most common examples of relationships include:

- **References:** Articles to which this article links.
- **Referenced By:** Articles linking to this article. These are sometimes called back links.
- **Emailed by:** Articles resulting from cases where this article was emailed by a user from Traction.

The example below is titled "Testing Unit Delivery Delayed." You can see under the Title that it's TractionID is *Engineering39* and it was posted by *Admin* on *May 1, 2006 at 10:58:21 EDT*. The header also shows you the author, editing authors, an *edit history* link (edit history is only visible if you have edit permission), a *cross references* link and an indication that there is 1 comment..

*Note* that the URL embedded in the TractionID, *Engineering39*, link is this article's *permalink* (#), which will read as <http://servername/traction/permalink/engineering39>. When linking within Traction, use the TractionID, *Engineering39* in this case, and use the permalink when linking from another website or an email.

In the upper right margin, you can see that there are two labels on title/article level, the *done* label and the *issue* label.

The 1 comment is an article level comment, so it appears below the first paragraph.

Following the article, there is a comment form, the *Related Articles* section, and the *Discussion Thread* section. The Related Articles section lists the articles that are linked to from this article and that link to this article. The Discussion thread section models the comment threads on this article and allows you to navigate to various levels of the discussion.



traction

Front Page > Engineering > 39

**Projects**  
**Engineering (16)**  
Executive (2)  
HR (6)  
Intelligence (5)

**Engineering** » [Recent Articles](#) | [Recent Comments](#) | [All Recent](#)

Date Range Selector  
Active Years  
2005  
2006  
Go to Today

---

**Engineering**  
**Sections**  
Headlines  
Status Reports  
Meeting Notes  
Issues To Do  
Questions To Do  
Recent Articles  
Bulletins  
Recent To Do  
Recently Done  
  
**Labels**  
bulletin (3)  
done (3)  
FAQ (3)  
FYI (1)  
headline (1)  
issue (2)  
meeting (1)  
question (2)  
status (1)  
to do (3)

**Engineering**
Show Full content with comments Expanded

## Testing Unit Delivery Delayed

Engineering39 | May 1, 2006 | 10:58:21 PM EDT  
Posted and Edited by admin | View edit history  
Cross References | 1 Comment

With notification of this delay by phone today, we find ourselves in a pickle (or a peck of pickles, see Engineering36: How Many Pickles in a Peck?). We will need to adjust client expectations or face a charge on the BigCo account.

We should contac the client as soon as we have initial details.

**Article Comments**  

The shipper says we can expedite the delivery if we pay for saturday delivery. Issue closed!  
admin / Engineering40 / May 1, 2006 / 10:59:07 PM EDT

Add a Comment on this Article  

B I U ABC | [List Icons] | Paragraph [Dropdown] | [Icons] | HTML

in the project Engineering

**Date Range Selector**  
Active Years  
2005  
2006  
Go to Today

---

**On This Page**  
done (1)  
issue (1)

**Related Articles**  
referenced by (1)  
Executive2: Sample Executive Meeting  
references (1)  
Engineering36: How Many Piddes in a Peck?

**Discussion Thread**  

Engineering39: Testing Unit Delivery Delayed ←  
O admin / Engineering40 / May 1, 2006 / 10:59:07 PM EDT

1 article, 2 paragraphs  
[feedback](#) • [contact us](#) • [help](#)  
Copyright © 2006 Your Company Name Here, Inc. All rights reserved.

**Article Tools**  
Add New Article  
Add Comment  
Edit Article  
Change Labels  
Email Reply  
Send Trackback  
Create Share Folder  
Visibility

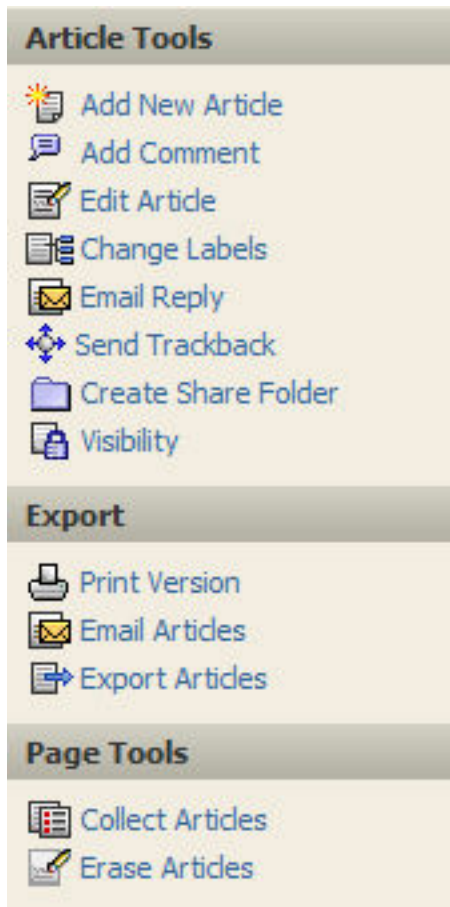
**Export**  
Print Version  
Email Articles  
Export Articles

**Page Tools**  
Collect Articles  
Erase Articles

**Account**  
Server Setup  
Project Setup  
My Account (admin)  
My Collector  
Sign Out

**Sidebar Shortcuts**  
This article (Engineering13: Sidebar Shortcuts) is set as the default *Sidebar Article*. Click on the title "Sidebar Shortcuts" and edit this article to include useful shortcut links.  
  
You can change the server Sidebar Article in *Server Setup Defaults* and over-ride it in each project in *Project Setup / Display*.  
  
Shortcut links to Resolved Issues and Questions:  
- Resolved Issues  
- Resolved Questions  
  
Shared Files for Engineering

The **Article**, **Export** and **Page Tools** displayed depend on the view type. The single entry view shows most of the potential tools:



Note that most of the Article Tools e.g. edit article, erase article and visibility, depend on permissions controlled by the project administrator. If you don't have the permission, you won't see the tool.

Article Tools operate over the article in a single article view. Export and Page Tools operate over all the articles and comments which appear in a single article view (in which case there is only one) or a multi-entry view.

### ***Expanding and collapsing comments or comment threads***

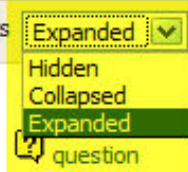
If an article has a lot of comments, you may want to collapse all comments, hide all comments, or collapse specific comments or comment threads.

In this example, the user has chosen to show all comments in Expanded mode.



Engineering » [Recent Articles](#) | [Recent Comments](#) | [All Recent](#)

Show Full content with comments



## Sample Engineering Questions

Engineering6 | September 27, 2005 | 2:53:40 PM EDT

Posted and Edited by admin | [View edit history](#)

[Cross References](#) | [3 Comments](#)

This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newspaper.

### 1. How do I comment on a paragraph?


You can hover over a paragraph and right click to see the Traction Context Menu where you can choose Comment from the Paragraph section of the menu. Or, left click the "M" Menu marker at the end of any paragraph to expose the context menu.


admin / Engineering7 / September 27, 2005 / 2:55:34 PM EDT  


### 2. How do you find Traction Help?



You can [click here](#) for the help guide which includes help for users and administrators.

Most users dont need help, but you can learn a lot from it!


admin / Engineering68 / August 30, 2006 / 12:37:31 PM EDT 


admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT 

Also, the help link is always at the bottom of the screen and, occasionally you will see a  link which you can click for context sensitive help.

admin / Engineering9 / September 27, 2005 / 2:58:12 PM EDT  

### 3. How can I add new labels?

You will notice the collapse icons to the left of a thread 

or on the upper right of each comment 

. You can click these to minimize the comment or whole thread:

## 2. How do you find Traction Help?

You can [click here](#) for the help guide which includes help for users and administrators.

Most users dont need help, but you can learn a lot from it!

admin / Engineering68 / August 30, 2006 / 12:37:31 PM EDT

admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT

Also, the help link is always at the bottom of the screen and, occasionally you will see a

admin / Engineering9 / September 27, 2005 / 2:58:12 PM EDT

## 3. How can I add new labels?

The thread will collapse as you see below, and can be expanded by clicking on the comment snippet or the expand control:

## 2. How do you find Traction Help?

You can [click here](#) for the help guide which includes help for users and ...

admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT

Also, the help link is always at the bottom of the screen and, ...

admin / Engineering9 / September 27, 2005 / 2:58:12 PM EDT

## 3. How can I add new labels?

### **Multi-entry view and Search Results View**

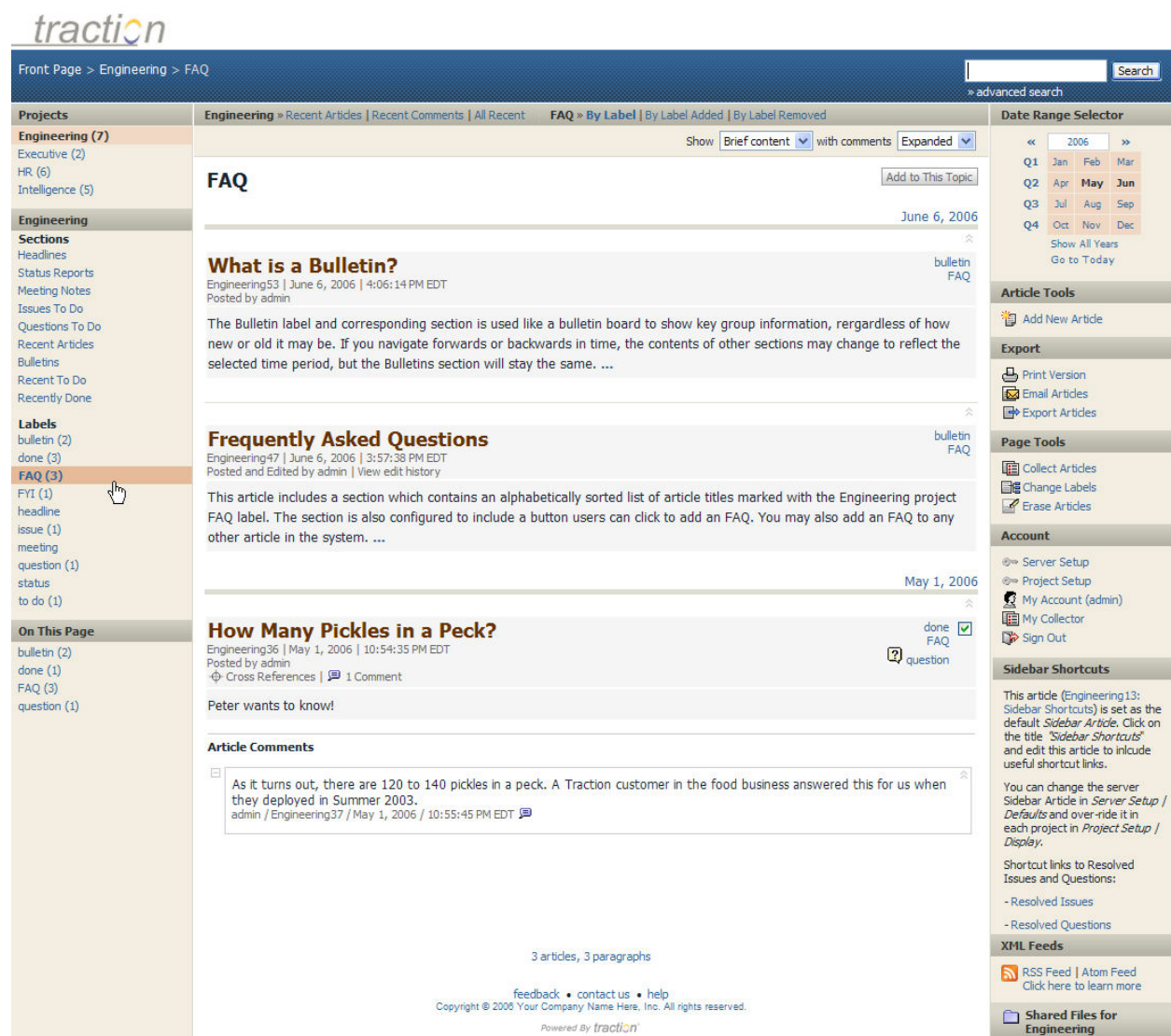
Multi-entry views are like stacked single-entry views, except that in some cases they show less contextual detail. The most common ways to get to a multi-entry view include:

- Clicking on a *label* within an *article* or on a label from a project's label list in the left column
- Clicking a section title link
- Advanced Search (when searching for a label)

Multi-entry views appear, by default, in *brief volume* which means they only show the title and the lead paragraph or the matching paragraph (if a selected label was placed on a paragraph level). Paragraphs are selected for inclusion differently based on the view type, depending on whether they match a search expression, have comments, or have labels.

The **Search Results** view is another form of multi-entry view. You will learn more about search in the [Searching in Traction](#) section.

The following example shows a multi-entry view in *Brief* volume for the label *FAQ* in the Engineering Project. The Brief volume will show all paragraphs which have the label or labels sought for in this view. In this case, the FAQ label in each example is on the article title so it is showing the nearest (the first) paragraph.



The screenshot displays the Traction software interface. The top navigation bar shows "Front Page > Engineering > FAQ". The sidebar on the left lists various sections and labels, with "FAQ (3)" highlighted. The main content area shows three articles: "What is a Bulletin?", "Frequently Asked Questions", and "How Many Pickles in a Peck?". Each article includes a title, date, and a brief description. The right sidebar features a "Date Range Selector" showing the year 2006, with May and June highlighted. Below this are "Article Tools" and "Page Tools" sections.

**Locator:** The locator shows that you are in the FAQ topic for the Engineering project. You can click the Engineering link to go to the Engineering project, or the Front Page link to return to the Front Page.

Front Page > Engineering > FAQ

**Date Range Selector :** The selected date range is the year of 2006. Also notice that the date range selector has bolded May and June to indicate that the contents of this view are published in those months. We can drill further into the calendar to see what days have content.

Date Range Selector

<<
2006
>>

Q1	Jan	Feb	Mar
Q2	Apr	May	Jun
Q3	Jul	Aug	Sep
Q4	Oct	Nov	Dec

Show All Years
Go to Today

**Volume Selector:** You will find the volume selector in the upper right of the body column in single and multi-entry views. You can switch to *Full Content*, *Brief Content*, *Snippets*, *Details* or *Titles* volume with the volume selector. You can also select whether to *expand*, *collapse* or *hide* comments which are shown in-line with the content in the view.

Show
Brief content
with comments
Expanded

Titles
Details
Snippets
Brief content
Full content

Switching to Details will collapse the view to look like this:

Show
Details

Add to This Topic

June 6, 2006

### What is a Bulletin?

Engineering53 | June 6, 2006 | 4:06:14 PM EDT | Posted by admin

### Frequently Asked Questions

Engineering47 | June 6, 2006 | 3:57:38 PM EDT | Posted by admin

May 1, 2006

### How Many Pickles in a Peck?

Engineering36 | May 1, 2006 | 10:54:35 PM EDT | Posted by admin

**Left Navigation:** The left navigation column appears as before. The current project and the corresponding selected label are highlighted. In this context, you also see an "On this Page" navigator.

<b>Projects</b>
<b>Engineering (7)</b>
Executive (2)
HR (6)
Intelligence (5)
<b>Engineering</b>
<b>Sections</b>
Headlines
Status Reports
Meeting Notes
Issues To Do
Questions To Do
Recent Articles
Bulletins
Recent To Do
Recently Done
<b>Labels</b>
bulletin (2)
done (3)
<b>FAQ (3)</b>
FYI (1)
headline
issue (1)
meeting
question (1)
status
to do (1)
<b>On This Page</b>
bulletin (2)
done (1)
FAQ (3)
question (1)

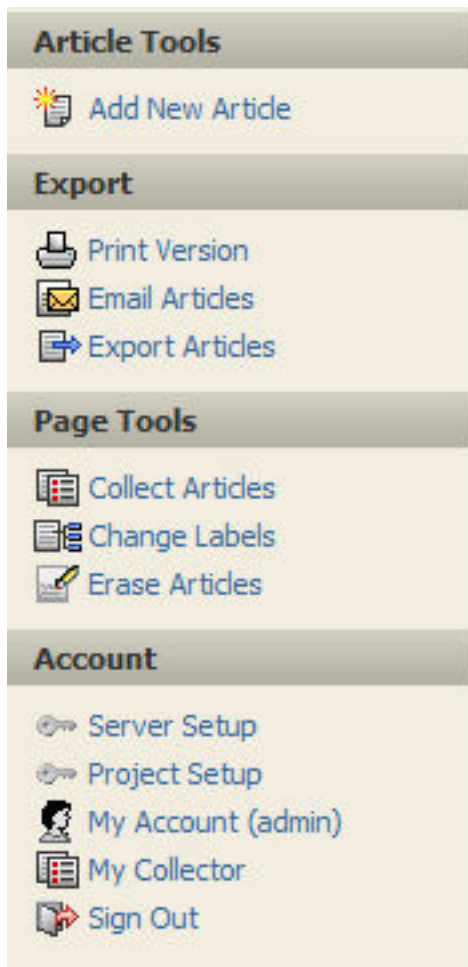


**On This Page Navigator in Full or Brief Content Views:** The On this Page part of the left column allows for drill-down navigation. *It will only appear if your Volume Selector is set to Brief or Full Content views as both these views display labels, whereas Snippets, Details and Titles do not show labels.* This list tells you which labels appear on how many articles or comments in the current view. We clicked the FAQ label and got 3 results. So, "On this Page" shows 3 results. As it turns out, of those 3 results, 2 are also marked with the bulletin label, 1 is marked done and 1 is marked question.

On this Page is scoped to this actual page. If there are 40 articles marked FAQ but only 25 are showing (with an option to move to the *next 25* or *show all* at the bottom of the page) then it will report the On this Page results for only the 25 displayed articles.

You can click any of the labels in the On this Page result to drill down to a Multiple Articles view of the combined result, where you can drill down further.

**Page Tools & Right Column:** Notice that the Page Tools showing on the right column of the page now includes *Change Labels* and some of the tools that were in the single-entry view, like *Edit Article* or *Add Comment* are no longer displayed. Change Labels in this context would allow you to remove or add labels to all the articles in this view. Print, email and export controls also apply to all articles in the view.



Nonetheless, you can generally still access these tools from the context menu.

**XML Feed of this View:** It is worth remembering that most views in Traction have a corresponding XML Feed. The XML Feed Links in the right column of this view now correspond to the results with the label FAQ. This will work for any search or label view. It will not work for "On this Page" drill down results (but if you want to create an XML Feed of a multiple label result, you could use advanced search to select multiple labels and qualify with the ALL instead of ANY labels check box).



### Hiding/Showing Articles In-Line from Brief and Full views

Have you ever looked at list of search results and wanted to see the full contents of some results while minimizing the others? In Brief or Full content Multi Entry views in Traction, you can hide and show articles on a page by clicking the hide/show toggle, shown highlighted below.

Whether an article was last hidden or shown is not currently preserved when you leave the page.



Show **Brief content** with comments **Expanded**

## FAQ

[Add to This Topic](#)

June 6, 2006

What is a Bulletin?



## Frequently Asked Questions

Engineering47 | June 6, 2006 | 3:57:38 PM EDT  
Posted and Edited by admin | [View edit history](#)

bulletin  
FAQ

This article includes a section which contains an alphabetically sorted list of article titles marked with the Engineering project FAQ label. The section is also configured to include a button users can click to add an FAQ. You may also add an FAQ to any other article in the system. ...

May 1, 2006



## How Many Pickles in a Peck?

Engineering36 | May 1, 2006 | 10:54:35 PM EDT  
Posted by admin  
[Cross References](#) | [1 Comment](#)

done ☒  
FAQ  
question

Peter wants to know!

### Article Comments

As it turns out, there are 120 to 140 pickles in a peck. A Traction customer in the food business answered this for us when they deployed in Summer 2003.  
admin / Engineering37 / May 1, 2006 / 10:55:45 PM EDT

## Center Column Navigation Controls

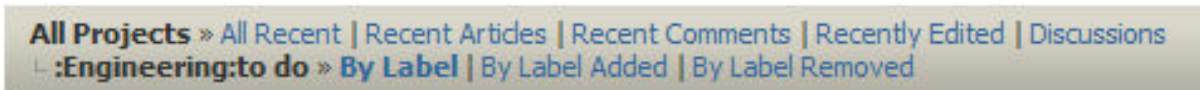
At the top of the center column is a list of view types that you can navigate to quickly.

**All Projects** » [All Recent](#) | [Recent Articles](#) | [Recent Comments](#) | [Recently Edited](#) | **Discussions**

- **All Recent** shows recent articles interleaved with recent comments in the order in which they were posted.
- **Recent Articles** shows recent articles only.

- **Recent Comments** shows recently posted comments.
- **Recently Edited** shows the most recently edited articles.
- **Discussions** shows the most recently commented-on articles.

In topic views, an additional line is displayed providing a few more options.



- **By Label** shows those articles posted during the time period on which the specified label appears..
- **By Label Added** shows those articles to which the specified label was added during the time period.
- **By Label Removed** shows those articles from which the specified label was removed during the time period.

## Visibility

Doc320: March 22, 2008 4:26 PM, Posted by Documentation Importer

### Determining the Visibility of an Article

The Visibility window shows who can read an article. The visibility of an article is governed by four factors:

- **Access permission:** Articles can only be seen by users who have **access** permission to the project in which an article is posted. Access permission does allow read permission, it only makes it possible. If a user has Access permission, then their ability to see an article is governed by the following three factors:
- **Read permission:** Articles are visible to all people with [Overview of the Project ACL Editor](#) permission **in the project** to which an article was posted.
- **Read Own Articles permission:** Articles are visible to the **person** who posted the article if that person has been granted [Overview of the Project ACL Editor](#) permission in the project.
- **Cross project labeling:** When an article is labeled with a label from another project, the article becomes visible to the readers of that project as well.

The article below is posted to the Executive project. However, it has an *FYI* label from the *Engineering* project. The Visibility link appears in the *article tools* in the right column of the single-article view.

traction

Front Page > Executive > 0

» advanced search

**Projects**

- Engineering (16)
- Executive (2)**
- HR (6)
- Intelligence (5)

**Executive**

**Sections**

- Headlines
- Status Reports
- Meeting Notes
- Issues To Do
- Questions To Do
- Recent Articles
- Bulletins
- Recent To Do
- Recently Done

**Labels**

- bulletin
- done (1)
- FAQ
- FYI
- headline (1)
- issue
- meeting (1)
- question
- status (1)
- to do (1)

**On This Page**

- :Engineering:FYI (1)

**Executive » Recent Articles | Recent Comments | All Recent**

Show Full content with comments Expanded

**Sample Executive Idea, cross labeled to Engineering** :Engineering:FYI

Executive0 | June 6, 2006 | 4:12:58 PM EDT  
Posted and Edited by admin | View edit history  
Cross References

This is a sample article in the Executive project. Perhaps I had an idea following reading Engineering4: Sample Engineering and Executive Status Report, and decided to share it with the Executive project members. At the time or thereafter, I wanted to share it with the Engineering group.

This article is cross-labeled with the FYI label to the Engineering project. The application of the FYI label (or any label from the Engineering project, for that matter) to this meeting note provides the Engineering team selective permission in Traction to see it (provided the users have ACCESS permission to the Executive project).

**Article Comments**

Add a Comment on this Article

**B I U ABC** | **1 2 3 4 5 6 7 8 9 10** | **Paragraph** | **ab** | **HTML**

**Post Comment** in the project **Executive**

**Related Articles**

**references (1)**

Engineering4: Sample Engineering and Executive Status Report

**Date Range Selector**

Active Years  
2006  
Go to Today

**Article Tools**

- Add New Article
- Add Comment
- Edit Article
- Change Labels
- Email Reply
- Send Trackback
- Create Share Folder
- Visibility**

**Export**

- Print Version
- Email Articles
- Export Articles

**Page Tools**

- Collect Articles
- Erase Articles

**Account**

- Server Setup
- Project Setup
- My Account (admin)
- My Collector
- Sign Out

**Sidebar Shortcuts**

This article (Engineering13: Sidebar Shortcuts) is set as the default *Sidebar Article*. Click on the title "Sidebar Shortcuts" and edit this article to include useful shortcut links.

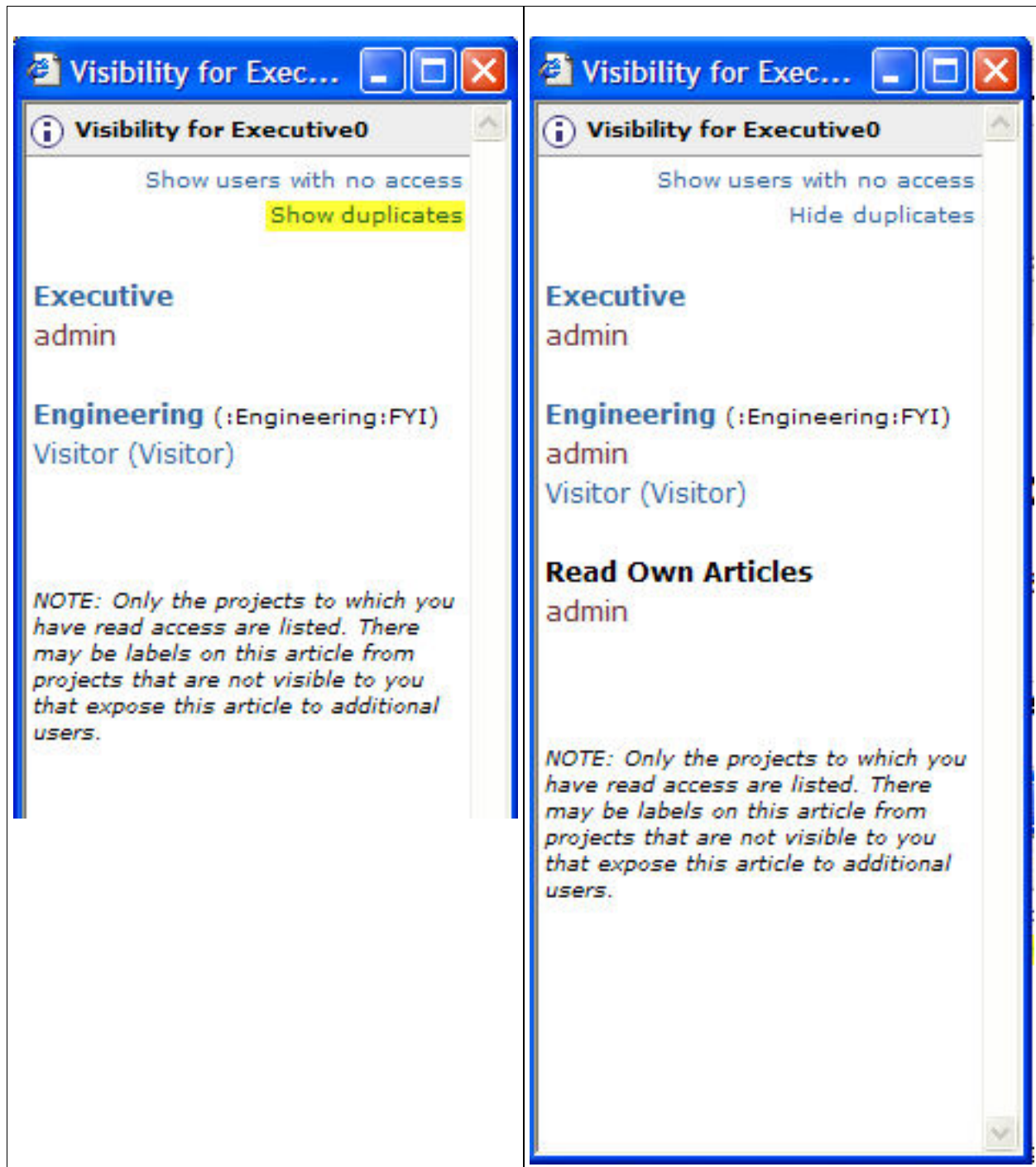
Clicking this link opens the Visibility window for the article. You can see that user named *admin* can read this article based on their permission to the *Executive* project. Because the article is cross-labeled to the Engineering project, you can see that *Visitor* can also read the article based on their ability to read the *Engineering* project.



### ***Hiding and Showing Duplicates***

If a user has read permissions in more than one project appearing in the Visibility window, the user is normally listed only once, in the first place that grants that user visibility. If you wish to show all places a user is listed, you can click the *Show Duplicates* link.

Hiding Duplicates (Default)	Showing Duplicates



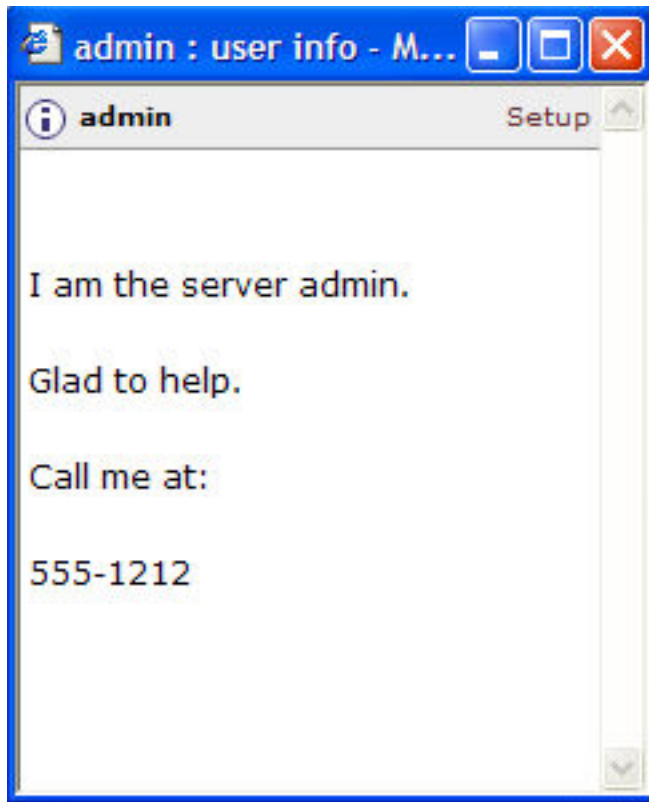
### Getting Additional Information About a User

Each user listed contains a link to a user details window. For example, clicking admin:





Launches the info page for the Admin user. From this page, Server administrators can link to the setup view for the user.



## ***Add a Comment to a Paragraph or Article***

Doc6: March 22, 2008 3:45 PM, Posted by Documentation Importer

You can comment on an entire [article](#) Consists of a Title, Text, Attachments and Labels or on a specific paragraph. You can also comment on a comment or paragraph within a comment. Paragraph level comments appear in-line, under the paragraph they comment on. Multiple comments on the article or paragraph will stack up and nest like entries on a discussion board.

Note the project selector on the comment form will default to the project where they article is posted (if you have Comment permission in that project). You have the option to choose any other project where you have comment permission in order to direct it to a different audience depending on permissions or interest.

There are three ways to access the comment function:

1. **Article Comment:** Fill in the comment form at the bottom of the article. The comment form appears after the article in the single article view.



traction

Front Page > Engineering > 6

» advanced search

**Projects**

**Engineering (16)**

Executive (2)

HR (6)

Intelligence (5)

**Engineering**

**Sections**

Headlines

Status Reports

Meeting Notes

Issues To Do

Questions To Do

Recent Articles

Bulletins

Recent To Do

Recently Done

**Labels**

bulletin (3)

done (3)

FAQ (3)

FYI (1)

headline (1)

issue (2)

meeting (1)

question (2)

status (1)

to do (3)

**On This Page**

question (1)

to do (1)

**Engineering » Recent Articles | Recent Comments | All Recent**

Show **Full content** with comments **Hidden**

**Sample Engineering Questions**

Engineering6 | September 27, 2005 | 2:53:40 PM EDT

Posted and Edited by admin | View edit history

⚙ Cross References | 💬 3 Comments

This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newspaper.

1. How do I comment on a paragraph?
2. How do you find Traction Help?
3. How can I add new labels?

**Article Comments**

Add a Comment on this Article

**B I U ABC** | **Paragraph** | **HTML**

type your article level comment here...

**Post Comment** in the project **Engineering**

**Discussion Thread**

Engineering6: Sample Engineering Questions ←

- admin / Engineering7 / September 27, 2005 / 2:55:34 PM EDT
- admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT
- admin / Engineering9 / September 27, 2005 / 2:58:12 PM EDT

**Date Range Selector**

Active Years

2005

2006

Go to Today

**Article Tools**

Add New Article

Add Comment

Edit Article

Change Labels

Email Reply

Send Trackback

Create Share Folder

Visibility

**Export**

Print Version

Email Articles

Export Articles

**Page Tools**

Collect Articles

Erase Articles

**Account**

Server Setup

Project Setup

My Account (admin)

My Collector

Sign Out

**Sidebar Shortcuts**

This article (Engineering13: Sidebar Shortcuts) is set as the default *Sidebar Article*. Click on the title "Sidebar Shortcuts" and edit this article to include useful shortcut links.

2. **Article Comment:** Click *Add Comment* on the Article Tools menu.

**Article Tools**

Add New Article

**Add Comment**

Edit Article

Change Labels

Email Reply

Send Trackback

Create Share Folder

Visibility

This will pop up a new entry Window into which you can type a comment. With this form, you can access certain functions (like insert table and edit attachments) which are not included in the in-line comment form.

http://localhost - Add Comment on Engineering6 - Mozilla Firefox

**Add Comment on Engineering6**

Project: Engineering ▼

Labels:  Choose

Edit Attachments (0)

Edit Relationships (0)

Edit Sections (0)

Title: re: Sample Engineering Questions

**B I U ABC** | | | Paragraph ▼ |

type your comment here...

Simplify HTML

If you want to eliminate mixed up font and color variations in an article you've copied from email or a web page, select the text you want to clean up, then click the "Remove Formatting" icon at the bottom of the add/edit form.

Style Article ▼

Cancel Save Draft Submit

Done

**3. Article or Paragraph Comment:** Choose *Comment* from the *Paragraph* or *Article* section of the *Context Menu*.

To access the *Context Menu*, hover your mouse over a paragraph in the article. You will see a grey

outline appear:

## Sample Engineering Questions

Engineering6 | September 27, 2005 | 2:53:40 PM EDT

Posted and Edited by admin | View edit history

⚙ Cross References | 💬 3 Comments

to do ☐  
question

This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newspage.

1. How do I comment on a paragraph?

02

2. How do you find Traction Help?

3. How can I add new labels?

### Article Comments

Add a Comment on this Article

**B** **I** **U** ABC | Paragraph ab

in the project

Now, right click (or left click on the down arrow at the right of the outlined area) to raise the context menu, and navigate down to the Comment option in the Paragraph section of the Context menu.

## Sample Engineering Questions

Engineering6 | September 27, 2005 | 2:53:40 PM EDT

Posted and Edited by admin | View edit history

[Cross References](#) | [3 Comments](#)

to do ☐

question

This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newspaper.

The screenshot shows the Traction Help interface. On the left, there are three numbered questions: "1. How do I comment on a paragraph?", "2. How do you find Traction Help?", and "3. How can I add new labels?". Below these is the "Article Comments" section, which includes a text input field with the placeholder "Add a Comment on this Article", a rich text editor toolbar with options like Bold (B), Italic (I), Underline (U), and Bulleted List, and a "Post Comment" button. To the right of the input field is a dropdown menu currently set to "Engineering". On the right side of the interface, a vertical menu is open, showing options for "Paragraph" (Action, Add to Section, Add Label, Change Labels, Collect) and "Article" (Change Labels, Edit Article, Email Article, Collect, Comment, Email Reply, Visibility, Export Articles, Erase Article). The "Comment" option under the "Article" category is highlighted with a mouse cursor. At the bottom, the "Discussion Thread" section is partially visible.

*Note that the context menu is divided into three sections: paragraph, article, and page. The tools listed under each section apply to the paragraph, the entire article, or, if you are in a multi-entry view, all the articles on the page.*

A comment form now appears below the selected paragraph:



## Sample Engineering Questions

Engineering6 | September 27, 2005 | 2:53:40 PM EDT

Posted and Edited by admin | View edit history

⚙ Cross References | 💬 3 Comments

to do ☐  
question ☐

This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newpage.

1. How do I comment on a paragraph?

Add a comment on Engineering6.02

**B** *I* U ABC |
 [List Icon] [List Icon] |
 [Link Icon] [Link Icon] |
 [Image Icon] |
 Paragraph [v] [Emoji Icon] [ab] HTML [Globe Icon]

You can hover over a paragraph and right click to see the Traction Context Menu where you can choose Comment from the Paragraph section of the menu. Or, (if Hovers are turned off) left click the "M" MENU marker at the end of any paragraph to expose the context menu.

Post Comment in the project Engineering [v]

2. How do you find Traction Help?



3. How can I add new labels?


When you have finished, press *Post Comment* and the comment immediately appears in the text. Until you reload the page, new comments are shown with a yellow highlight. Here is the same article with several in-line comments:

## Sample Engineering Questions

Engineering6 | September 27, 2005 | 2:53:40 PM EDT


Posted and Edited by admin | View edit history

 Cross References |  3 Comments



 [to do](#) ☐ [question](#)

This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newspaper.


### 1. How do I comment on a paragraph?




You can hover over a paragraph and right click to see the Traction Context Menu where you can choose Comment from the Paragraph section of the menu. Or, left click the "M" MENU marker at the end of any paragraph to expose the context menu.


admin / Engineering7 / September 27, 2005 / 2:55:34 PM EDT  


### 2. How do you find Traction Help?





You can [click here](#) for the help guide which includes help for users and administrators.

admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT 



Also, the help link is always at the bottom of the screen and, occasionally you will see a  link which you can click for context sensitive help.

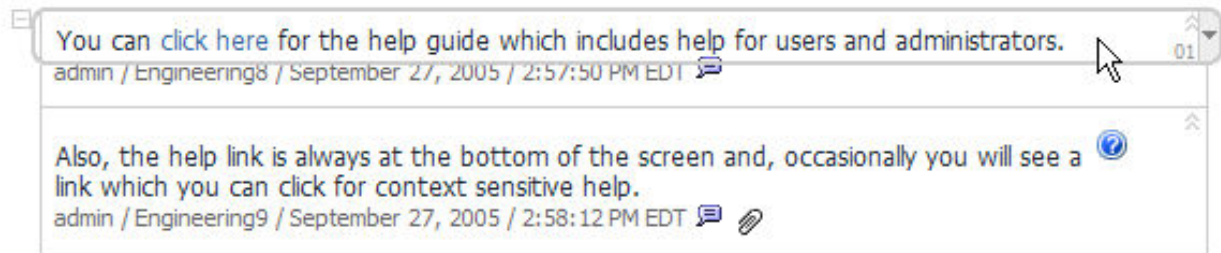
admin / Engineering9 / September 27, 2005 / 2:58:12 PM EDT  

### 3. How can I add new labels?

## Commenting on a Comment

If you want to comment on a comment, you can repeat the process to "stack" comments, or you can hover your mouse over a paragraph in a comment to "nest" your next comment, as in the example below:

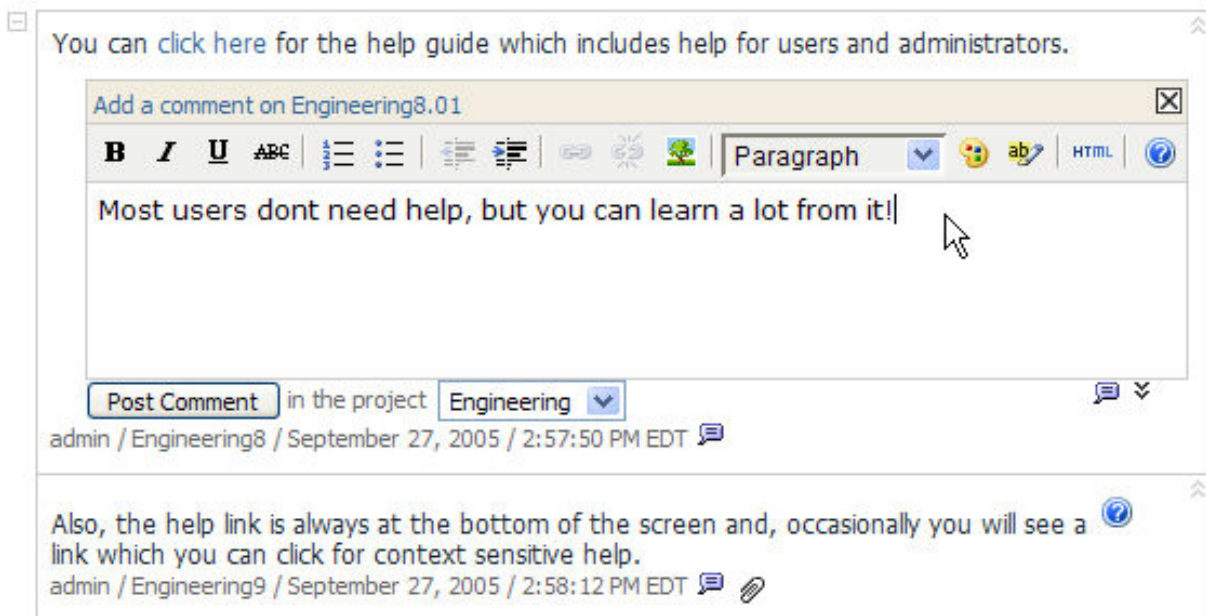
## 2. How do you find Traction Help?



## 3. How can I add new labels?

Choose the Paragraph / Comment option as before to open an in-line comment form where you will comment in the comment.

## 2. How do you find Traction Help?

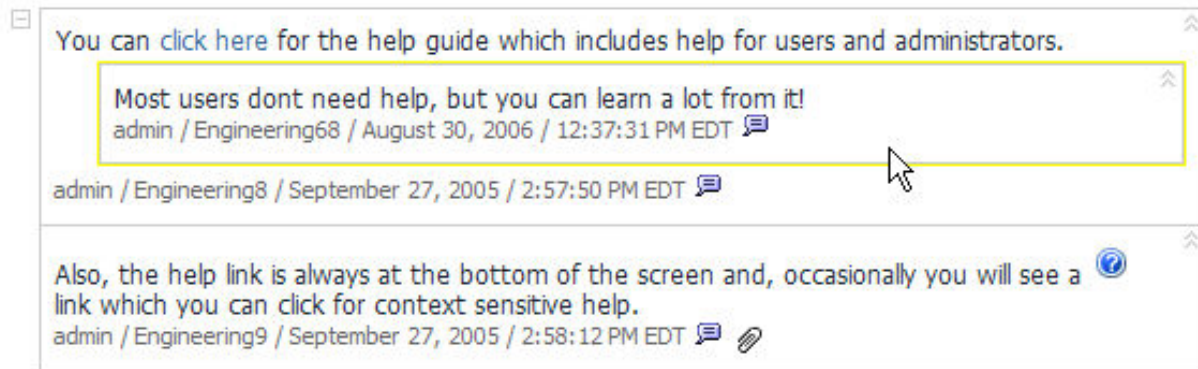


## 3. How can I add new labels?

And post your comment:



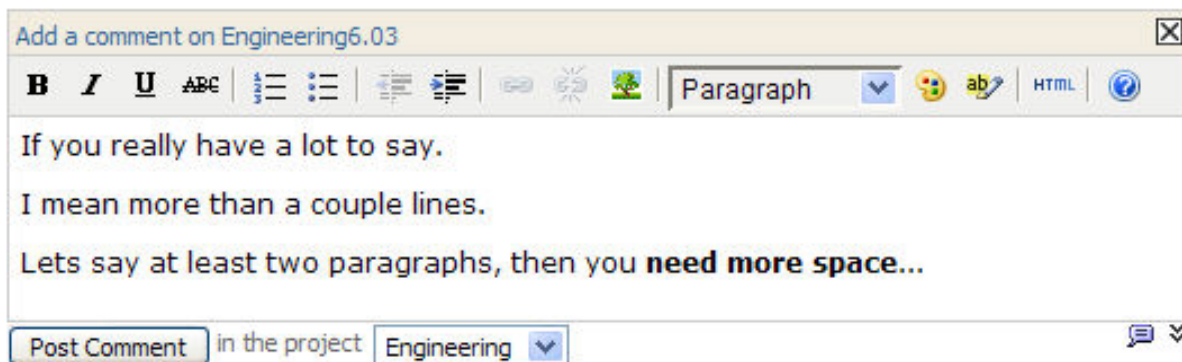
## 2. How do you find Traction Help?



## 3. How can I add new labels?

### ***Expanding the comment window***

Often, you may want to type a long comment:



If you need more lines to type your response, click the expand icon:



And you will get more space:

### Opening the Add Comment Window for In-Line Comments

If you want to use a full Add Comment form window to add your comment (to access the full capabilities including insert table, edit attachments, and save draft) you can click the balloon icon which appears in the lower right of the in-line comment form:



An *Add A Comment* window pops up pre-configured to post a comment. When you submit, the original page will be updated as if you posted from the in-line comment form.

[illegible]

## Inserting Images into Comments

There are two ways to insert an image into a comment.

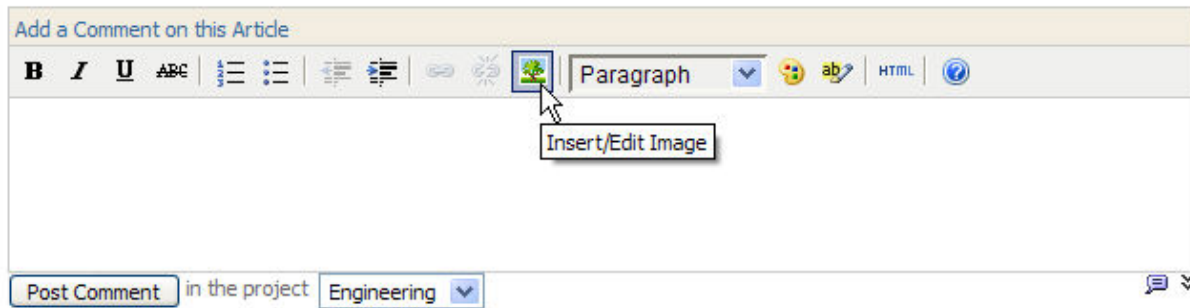
## Copy from the Web

As with the Add New Article form, if you paste an image from a web site into the comment area, Traction

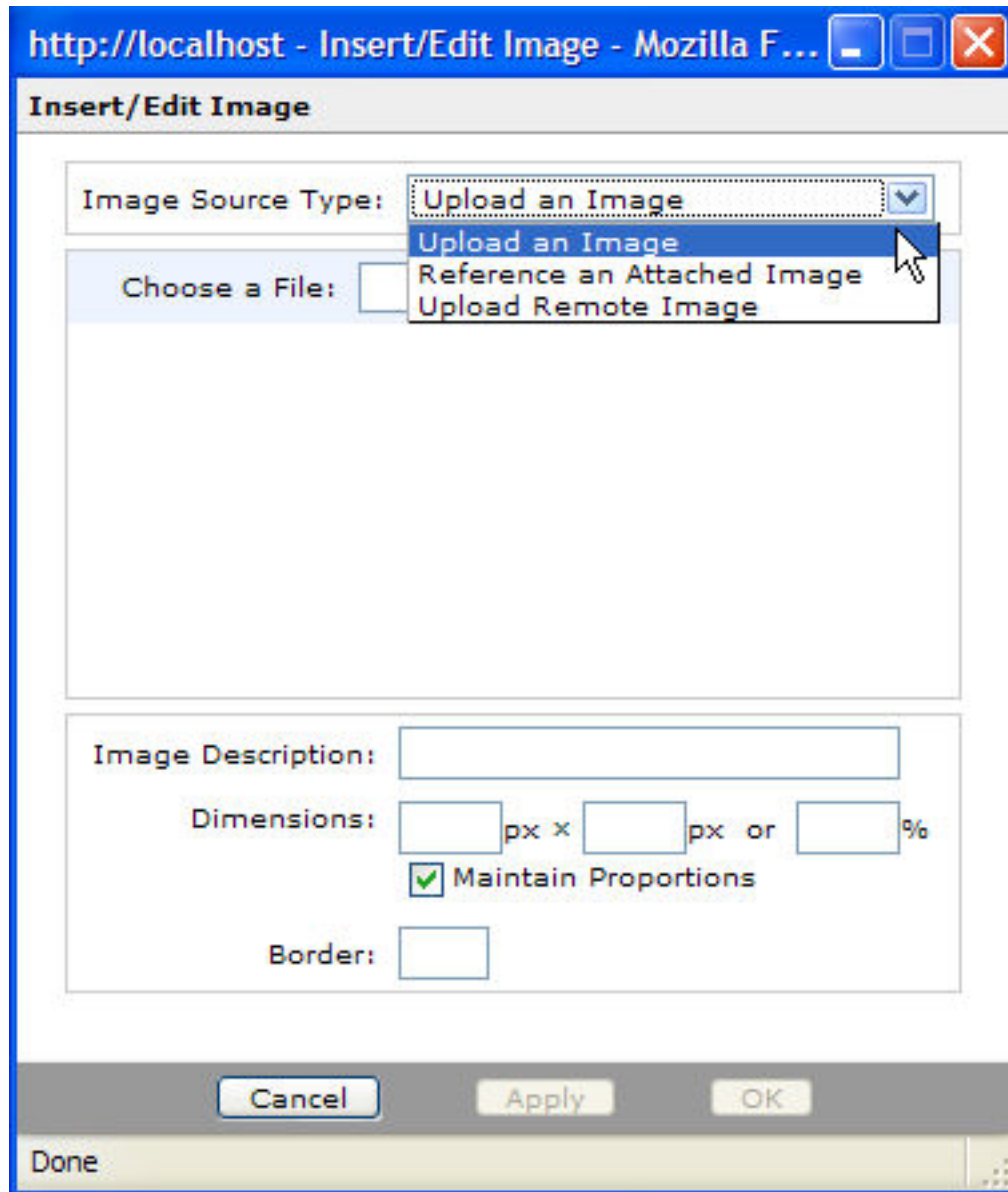
will attempt to download and attach the image when you post. Images whose URL or data is not visible to the Traction server (e.g. images in local files, images that require login access) will not be attached.

## Insert Image

The insert image tool lets you choose an image on your computer or an image that is on the web.



When you click the insert image tool, a dialogue box pops up allow you to upload or pull an image from a reference:



## Discussion Thread

The Discussion Thread map below the article provides a linkable map of the article and its full discussion thread. More detail on this is provided in the [Navigating from a Comment View to the Article it Comments on](#).

## Discussion Thread

### Engineering6: Sample Engineering Questions ←



- [admin / Engineering7 / September 27, 2005 / 2:55:34 PM EDT](#)
- [admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT](#)
  - [admin / Engineering68 / August 30, 2006 / 12:37:31 PM EDT](#)
- [admin / Engineering9 / September 27, 2005 / 2:58:12 PM EDT](#)

## ***Navigating from a Comment View to the Article it Comments on***

Doc173: March 22, 2008 4:08 PM, Posted by Documentation Importer

If you access a *comment* (by, for example, clicking the *comment* on the list of *recent articles*, clicking the Traction ID link at the end of a *comment*, or clicking a comment from a multi-entry or search view), you will end up in a view of the comment.


You can see in the example below that this *comment* is actually its own Traction *article*, with its own *author*, *title* and *Traction ID*.

This comment, engineering68. comments on the quoted paragraph in Engineering8.

## re: Sample Engineering Questions

Engineering68 | August 30, 2006 | 12:37:31 PM EDT

Posted by admin

 Cross References

You can [click here](#) for the help guide which includes help for users and administrators.

admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT 

Most users dont need help, but you can learn a lot from it!

 Show complete discussion thread on Engineering6: Sample Engineering Questions

### Article Comments


Add a Comment on this Article


**B**


*I*


U


ABC
















































































































Paragraph













































ab



HTML



Post Comment

in the project

Engineering

### Discussion Thread

Engineering6: Sample Engineering Questions

- admin / Engineering7 / September 27, 2005 / 2:55:34 PM EDT
- admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT
  - **admin / Engineering68 / August 30, 2006 / 12:37:31 PM EDT ←**
- admin / Engineering9 / September 27, 2005 / 2:58:12 PM EDT

There are three ways to navigate out of the comment view.

Page 64 of 220



## re: Sample Engineering Questions

Engineering68 | August 30, 2006 | 12:37:31 PM EDT

Posted by admin

• Cross References

You can [click here](#) for the help guide which includes help for users and administrators.

admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT

Most users dont need help, but you can learn a lot from it!

Show complete discussion thread on Engineering6: Sample Engineering Questions

### Article Comments

Add a Comment on this Article

**B** *I* U ABC | | | | | Paragraph | | | HTML |

Post Comment

in the project

Engineering

### Discussion Thread

Engineering6: Sample Engineering Questions

- admin / Engineering7 / September 27, 2005 / 2:55:34 PM EDT
- admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT
  - **admin / Engineering68 / August 30, 2006 / 12:37:31 PM EDT ←**
- admin / Engineering9 / September 27, 2005 / 2:58:12 PM EDT

1. Click on the *Engineering8* link in the quoted paragraph. This will take you one level up the thread.
2. Click on the *Show complete discussion thread on Engineering6: Sample Engineering Questions* link. This will take you all the way up to the leading article in the discussion thread.
3. In the Discussion Thread map, you can see the comment you are viewing in bold with a left arrow. From here you can click to any comment in the thread, or click on *Engineering6: Sample Engineering Questions* to go to the leading article in the thread.

## Searching in Traction

Doc237: March 22, 2008 4:16 PM, Posted by Documentation Importer

**Note:** If your Traction server has the FAST Search option, please refer to the section [FAST Searching in Traction using the FAST Search option](#) instead.

There are three ways to search in Traction.

1. *Basic Search*, from the Search box in Traction. This searches articles in all projects for text you enter.

2. *Advanced Search*, available by clicking the link under the Search box in Traction. Allows search by text, title, author(s), date range, project(s), and label(s). It also has a selector to specify paragraph match.
3. *Rapid Selector*, allows you to issue a Rapid Selector command in the search box to make complex and Boolean queries. See the [Introduction to the Rapid Selector Guide](#) for further instructions on its use.

## **Basic Search**

For basic searches, just type your search in the search box and press Search.



A few tips

- The search box assumes an AND expression so if you search for two words you will get the result that has both terms.
- Wildcard searches are allowed, just add a \* to a prefix, e.g. intel\*
- Use quotes to search for an exact phrase, e.g. "Alien Intelligence"

Search hits are displayed in the body of the page, with word matches shown in **boldface** with a snippet of surrounding text. Here is a search for the word Intelligence.

Show

Snippets

▼

Search Filter Active

searching for intelligence

?

×

## Searching All Projects

July 14, 2006

### Intelligence Ethics Bulletin

Intelligence4 | July 14, 2006 | 10:42:22 AM EDT | Posted by admin

An *Intelligence* project may include a Bulletin entry ... refer to the Society for Competitive *Intelligence* Professional's (SCIP) Website for guidance ...

### Sample Intelligence Analysis on Apollo Objective

Intelligence3 | July 14, 2006 | 10:34:25 AM EDT | Posted by admin

... objective defined at Intelligence0: Sample "Apollo" *Intelligence* Objective (or KIT). It may refer to some human *intelligence* collected in Intelligence2: Sample HUMINT on ...

### Sample HUMINT on Apollo Objective

Intelligence2 | July 14, 2006 | 10:33:54 AM EDT | Posted by admin

This is sample human *intelligence* which may refer to competitor product or pricing information. If you gather human *intelligence* on an *intelligence* objective, you might mark it HUMINT ...

### Sample Intelligence Question

Intelligence1 | July 14, 2006 | 10:29:18 AM EDT | Posted by admin

This is a question which may have come in by direct post, a form or an email from the field. It is marked with the Question and To Do label. When its answered (for example, by posting an answer to this or another project, by replying to the email from Traction, or by commenting and sending the question and answer by email to the person who asked), you can check the box next to the To Do label ...

### Sample "Apollo" Intelligence Objective (or KIT)

Intelligence0 | July 14, 2006 | 10:26:36 AM EDT | Posted by admin

This is an *Intelligence* Objective. It has the Objective label ... often referred to by Corporate Competitive *Intelligence* Professionals as a Key *Intelligence* Topic (KIT) or by National *Intelligence* Professionals as a National *Intelligence* Topic (NIT). The *Intelligence* Objective has an associated Label. In ...

September 27, 2005

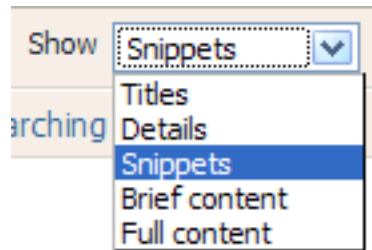
### Welcome to the Starter Journal - Read this First

Engineering0 | September 27, 2005 | 2:32:18 PM EDT | Posted by admin

... are named Executive Engineering and HR *Intelligence* The *Intelligence* Project is not initially active to ...

6 articles

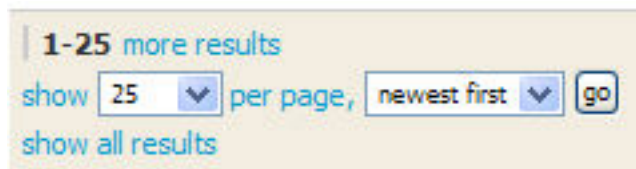
In the upper right there is a volume selector that allows you to see the results in titles, details, snippets, brief and full content volumes. More information on these volume options is found in [Navigating the Interface - In the Mexico Skin](#).



The Date Range Selector will show the time period where there are results, and allow you to drill into any selected time range:



In this example, there were only 6 results. However, if there are more hits than will display on the page, there is a link at the bottom of the page to show the next set of hits. You can also expand to show more than the default number of results or to re-order the results from newest first to oldest first.



## ***Advanced Search***

Click the Advanced Search link under the search box to access the Advanced Search Dialogue box. From here, you have many options to scope your search based on the title, text, date(s), label(s), author(s) and project(s). You can also scope your results to paragraph matches.

Advanced Search

?

Search for:

Search

☐ in the Title only

☐ Case sensitive

☐ Any Words

☒ All Words

☐ Exact Phrase

Search for Articles Created

☒ Anytime

☐ in the last

☐ After

☐ Before

☐ From

Label Names:

Choose

☐ Any Label

☒ All Labels

Tip: Separate multiple Labels with a comma or space.

Username or Email:

Tip: Separate multiple usernames and email addresses with a comma or space.

☐ All Projects

☒ Selected Projects

Available

Engineering

Executive

HR

Intelligence

Selected

Engineering

Executive

Add >>>

Remove

(If none are selected, then the search will look through all projects.)

Show  results per page sorted by

☐ All content, keywords, and specified labels must appear in the same paragraph

Cancel

Search

If the options here are not flexible enough (for example, you want any article that has the label Question anywhere but also has the words Shirt and Shoes in the same paragraph) then you can use [Introduction to the Rapid Selector Guide](#) to write a query in the search box.

## ***FAST Searching in Traction using the FAST Search option***

Doc109: March 22, 2008 4:01 PM, Posted by Documentation Importer, Edited by Paul Needham

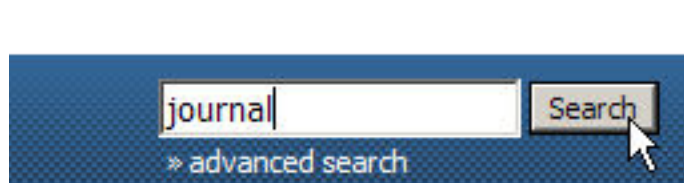
### ***Searching in Traction using the FAST Search option***

When the FAST Search option is installed, Traction's normal search interface is replaced with one powered by FAST *InStream*. See the section [FASTIntroduction](#) for more details.

FAST Search is currently supported in the Mexico, Ocean, Earth, and Simple skins.

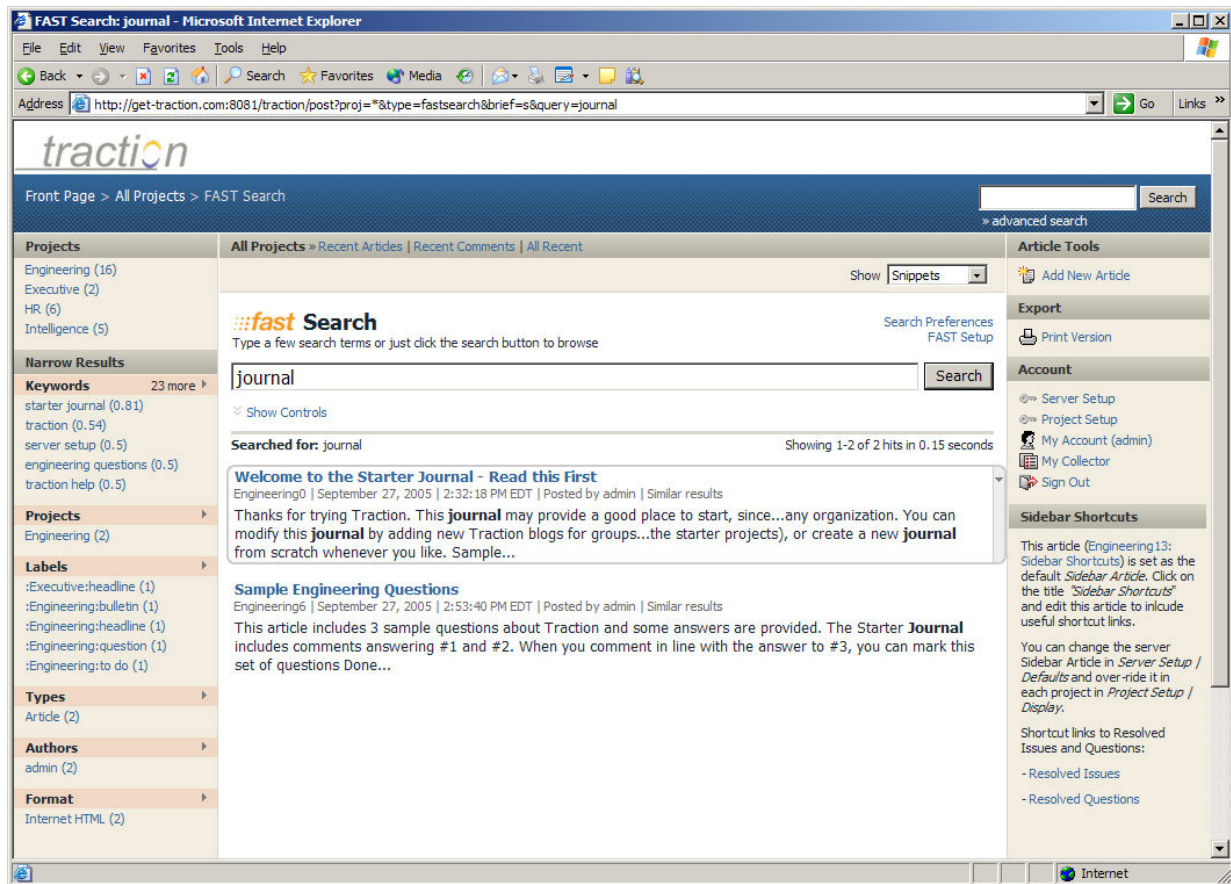
### ***Searching in the Mexico, Ocean, and Earth Skins***

If you wish to run a simple search, you can enter your search expression in the search box.

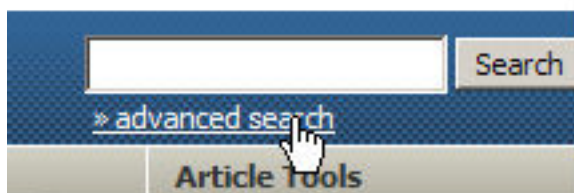


This takes you to the FAST Search page, with results displayed.



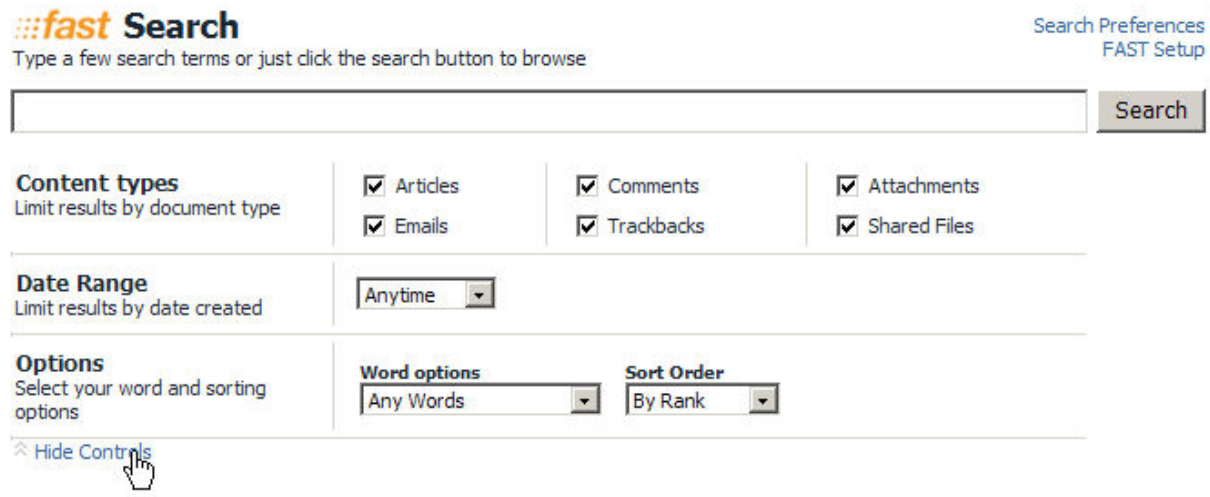


You can also click the Advanced Search link.



This navigates to the FAST Search page with the search controls expanded. You can hide the controls by clicking the "Hide Controls" link.





**fast Search** [Search Preferences](#)  
[FAST Setup](#)

Type a few search terms or just click the search button to browse

Search

<b>Content types</b> <small>Limit results by document type</small>	<input checked="" type="checkbox"/> Articles <input checked="" type="checkbox"/> Emails	<input checked="" type="checkbox"/> Comments <input checked="" type="checkbox"/> Trackbacks	<input checked="" type="checkbox"/> Attachments <input checked="" type="checkbox"/> Shared Files
---	--	--	---

**Date Range**  
Limit results by date created

Anytime ▾

**Options**  
Select your word and sorting options

**Word options**  

Any Words ▾

**Sort Order**  

By Rank ▾

[⌵ Hide Controls](#)

If the controls are not displayed, you can show them by clicking the "Show Controls" link.



**fast Search** [Search Preferences](#)  
[FAST Setup](#)

Type a few search terms or just click the search button to browse

Search

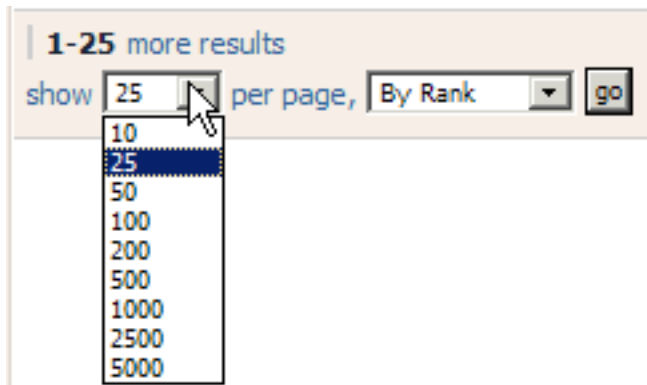
[⌵ Show Controls](#)

If you just click the "Search" button without entering any search expression, FAST Search will return either the highest rated documents, or the most recent or oldest documents, depending on the setting specified in the *Sort Order* control.

## Browsing Search Results

### Changing the number of results reported

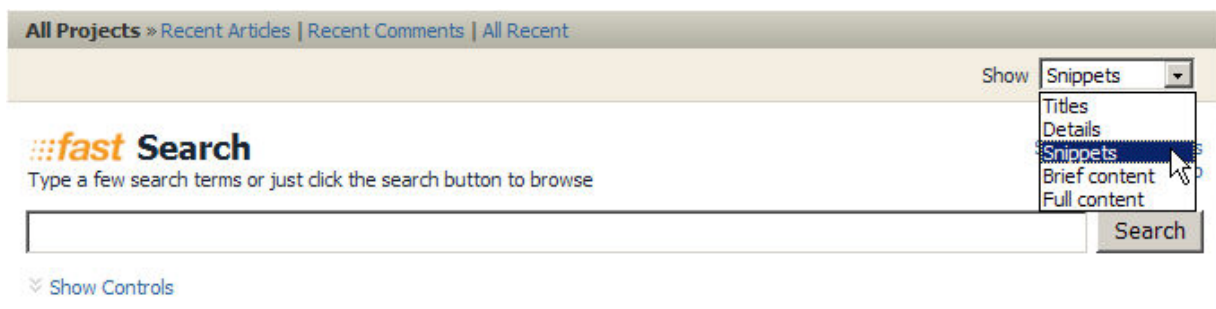
The number of search results displayed is controlled by your [Default Chunk Size](#) preference and by the footer at the bottom of the search results.



The server default chunk size can be specified in Server Setup | Defaults. Individuals can change their own preference in My Account | Preferences.

## Changing the amount of information shown

The volume controller in the upper-right of the view controls how much detail is displayed for search hits.



Titles shows only the document titles, for all hits:

Show
Titles

**fast Search**  
Type a few search terms or just click the search button to browse

[Search Preferences](#)  
[FAST Setup](#)

Show Controls

**Searched for:**
Showing 1-25 of 35 hits in 0.029 seconds

[Welcome to the Starter Journal - Read this First](#)  
[Sample Engineering and Executive Status Report](#)  
[Sample "Apollo" Intelligence Objective \(or KIT\)](#)  
[How Many Pickles in a Peck?](#)

Details shows the title, author, editor, date, and permalink, for all hits:

Show
Details

**fast Search**  
Type a few search terms or just click the search button to browse


[Search Preferences](#)  
[FAST Setup](#)


Show Controls

**Searched for:**
Showing 1-25 of 35 hits in 0.62 seconds

[Welcome to the Starter Journal - Read this First](#)  
Engineering0 | September 27, 2005 | 2:32:18 PM EDT | Posted by admin  
[Sample Engineering and Executive Status Report](#)  
Engineering4 | September 27, 2005 | 2:49:18 PM EDT | Posted by admin  
[Sample "Apollo" Intelligence Objective \(or KIT\)](#)  
Intelligence0 | July 14, 2006 | 10:26:36 AM EDT | Posted by admin  
[How Many Pickles in a Peck?](#)  
Engineering36 | May 1, 2006 | 10:54:35 PM EDT | Posted by admin

Snippets additionally shows a snippet of context surrounding the search hit from the original document, for all hits.

Show Snippets 



Type a few search terms or just click the search button to browse

Search

[Show Controls](#)

[Search Preferences](#)  
[FAST Setup](#)

---

**Searched for:**

Showing 1-25 of 35 hits in 0.651 seconds

**Welcome to the Starter Journal - Read this First**  
 Engineering0 | September 27, 2005 | 2:32:18 PM EDT | Posted by admin | [Similar results](#)  
 Thanks for trying Traction. This journal may provide a good place to start, since it includes projects (group blogs) for teams typically found in any organization.

**Sample Engineering and Executive Status Report**  
 Engineering4 | September 27, 2005 | 2:49:18 PM EDT | Posted by admin | [Similar results](#)  
 This is a status report for the engineering team. It includes a status label from both the Engineering and Executive projects, so it will show up in the Status Reports section of both Projects.

**Sample "Apollo" Intelligence Objective (or KIT)**  
 Intelligence0 | July 14, 2006 | 10:26:36 AM EDT | Posted by admin | [Similar results](#)  
 This is an Intelligence Objective. It has the Objective label and the Apollo label. It is tracked as open by the To Do label. When this objective is complete, you can check the box next to the To Do label to turn it into the Done label.

**Note:** for the above volumes, the context menu and hover is enabled for Traction posts, but not for attachments and shared files.

Brief and full show the normal Traction brief and full views, with most normal view options enabled.

**Note:** Hits in attachments and shared files are shown as snippets in brief and full views.

Show
Brief content
with comments
Collapsed

**fast Search**
[Search Preferences](#)  
[FAST Setup](#)

Type a few search terms or just click the search button to browse

[Show Controls](#)

Searched for:
Showing 1-25 of 35 hits in 0.62 seconds

### Welcome to the Starter Journal - Read this First

Engineering0 | TrackBack | September 27, 2005 | 2:32:18 PM EDT  
Posted and Edited by admin | [View edit history](#)  
[Cross References](#)

:Engineering:bulletin  
:Engineering:headline  
:Executive:headline

Thanks for trying Traction. This journal may provide a good place to start, since it includes projects (group blogs) for teams typically found in any organization. You can modify this journal by adding new Traction blogs for groups in your organization (you can also turn off the starter projects), or create a new journal from scratch whenever you like. Sample content has been loaded into each project and some setup options have been used to configure each project to give you a jump start and a few examples. *Please click the title of this article to read more. ...*

### Sample Engineering and Executive Status Report

Engineering4 | TrackBack | September 27, 2005 | 2:49:18 PM EDT  
Posted and Edited by admin | [View edit history](#)  
[Cross References](#)

:Engineering:status  
:Executive:status

This is a status report for the engineering team. It includes a status label from both the Engineering and Executive projects, so it will show up in the Status Reports section of both Projects.

## Simple Search Filtering Using Navigators

You can narrow your search results using navigators that let filter your search hits by various metadata criteria, such as keyword, project, label, document type, author, company, person name, email address, location, date posted, language, document size, and other criteria.

The top five matches for each navigator shown in the left column.

**Narrow Results**

**Keywords**

95 more ▶

[sample engineering \(0.17\)](#)
[engineering project \(0.12\)](#)
[server setup \(0.10\)](#)
[meeting note \(0.10\)](#)
[label \(0.09\)](#)

**Projects**

▶

[Engineering \(20\)](#)
[HR \(8\)](#)
[Intelligence \(5\)](#)
[Executive \(2\)](#)

**Labels**

22 more ▶

[:HR:policy \(4\)](#)
[:Intelligence:Apollo \(3\)](#)
[:Engineering:bulletin \(3\)](#)
[:Engineering:done \(3\)](#)
[:Engineering:meeting \(3\)](#)

**Types**

▶

[Article \(23\)](#)
[Attachment \(6\)](#)
[Comment \(6\)](#)

**Authors**

▶

[admin \(35\)](#)

**Names**

▶

[Eileen Thomas \(1\)](#)
[Kim Patterson \(1\)](#)

If there are more matches, the number of additional matches is displayed next to the title of the navigator. You can click the title to show the complete list expanded.



**Labels** 22 more ▾

:HR:policy (4)  
 :Intelligence:Apollo (3)  
 :Engineering:bulletin (3)  
 :Engineering:done (3)  
 :Engineering:meeting (3)

**Types** ▸

Article (23)  
 Attachment (6)  
 Comment (6)

**Authors** ▸

admin (35)

**Names** ▸

Eileen Thomas (1)  
 Kim Patterson (1)

**Labels** [Close](#) 

Click single words to narrow OR  
 Use  to narrow using more than one term.

Engineering	headline (1)	Apollo (3)
bulletin (3)	meeting (1)	bulletin (1)
done (3)	status (1)	HUMINT (1)
FAQ (3)	to do (1)	objective (1)
FYI (1)	HR	question (1)
headline (1)	done (1)	to do (2)
issue (2)	FAQ (1)	
meeting (3)	policy (4)	
question (2)	question (2)	
status (1)	to do (1)	
to do (3)	Intelligence	
Executive	analysis (1)	
done (1)		

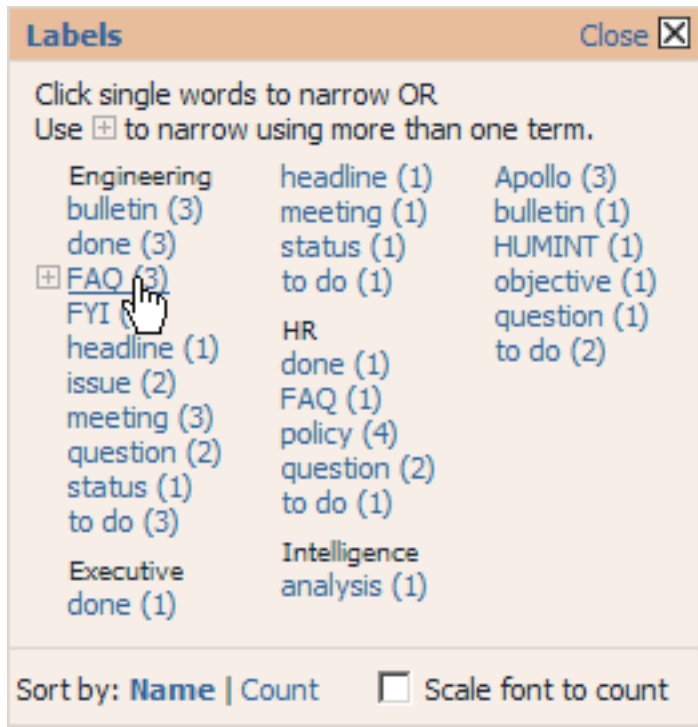
Sort by: **Name** | Count ☐ Scale font to count

determine if the delay's impact will have a

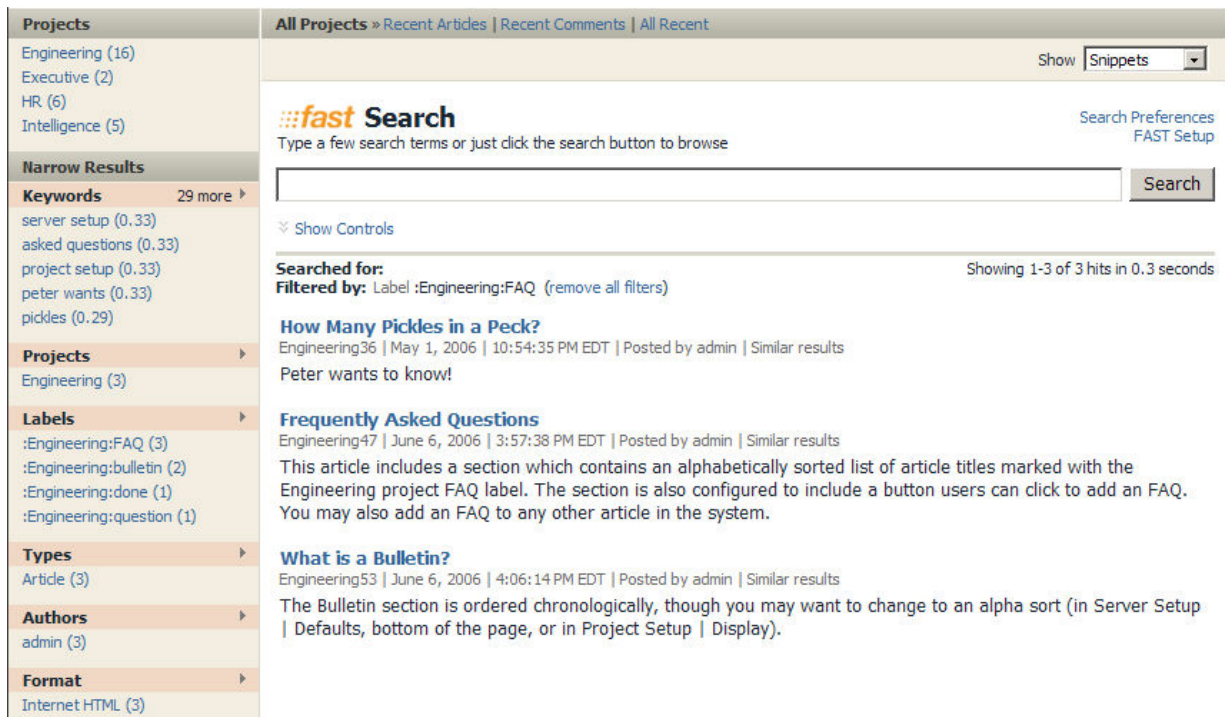
If you wish to restrict your search to show only hits that appear in documents with matching metadata, you can click one of the metadata options to narrow your results.

For example, to show only hits that are also Engineering FAQs, you can click the FAQ label.

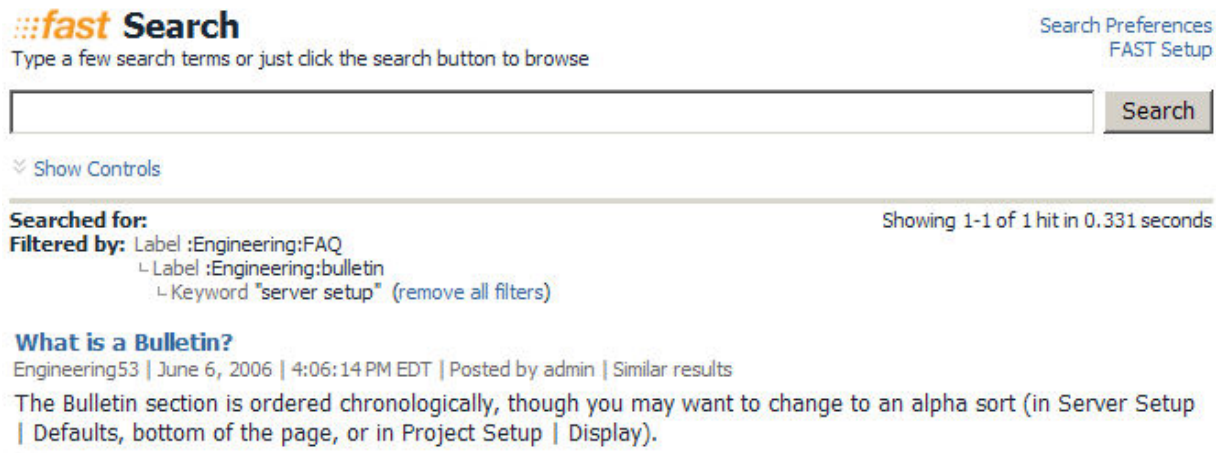




This brings you to a view that shows only those hits that have the requested label.



You can repeat this operation as many times as you like. Each time, additional filter terms are added to your search. These terms are reflected in the search feedback area.



**fast Search** [Search Preferences](#)  
[FAST Setup](#)

Type a few search terms or just click the search button to browse

[Show Controls](#)

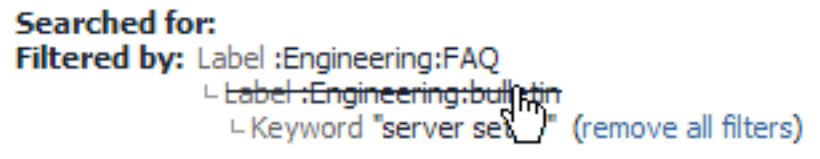
---

**Searched for:** Showing 1-1 of 1 hit in 0.331 seconds

**Filtered by:** Label :Engineering:FAQ  
     └ Label :Engineering:bulletin  
     └ Keyword "server setup" ([remove all filters](#))

**What is a Bulletin?**  
 Engineering53 | June 6, 2006 | 4:06:14 PM EDT | Posted by admin | [Similar results](#)  
 The Bulletin section is ordered chronologically, though you may want to change to an alpha sort (in [Server Setup Defaults](#), bottom of the page, or in [Project Setup](#) | [Display](#)).

The effects of the filters are combined: only search results that pass all of the filters are shown. You can remove individual filters by clicking on them. The cursor will show a strikethrough and the tool tip "Remove Filter" will appear to let you know that the filter term will be removed.



**Searched for:**

**Filtered by:** Label :Engineering:FAQ  
     └ ~~Label :Engineering:bulletin~~  
     └ Keyword "server setup" ([remove all filters](#))

You can also remove all the filters by clicking the "remove all filters" link.



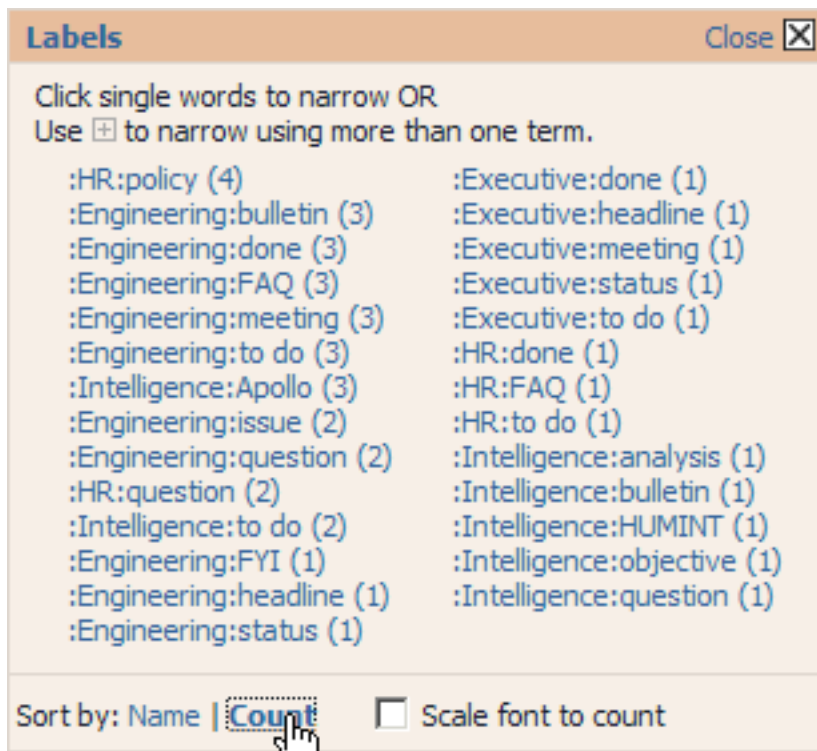
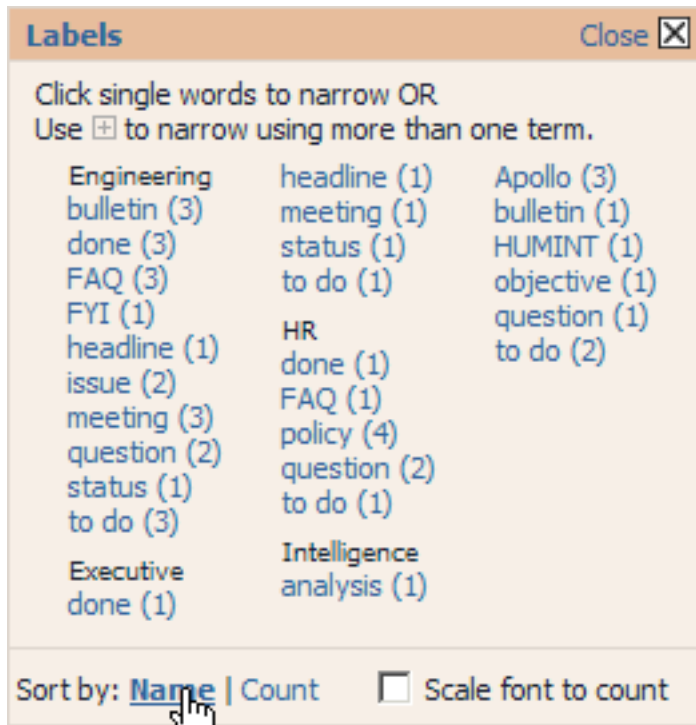
**Searched for:**

**Filtered by:** Label :Engineering:FAQ  
     └ Keyword "server setup" ([remove all filters](#))

**What is a Bulletin?**

## Navigator Display Options

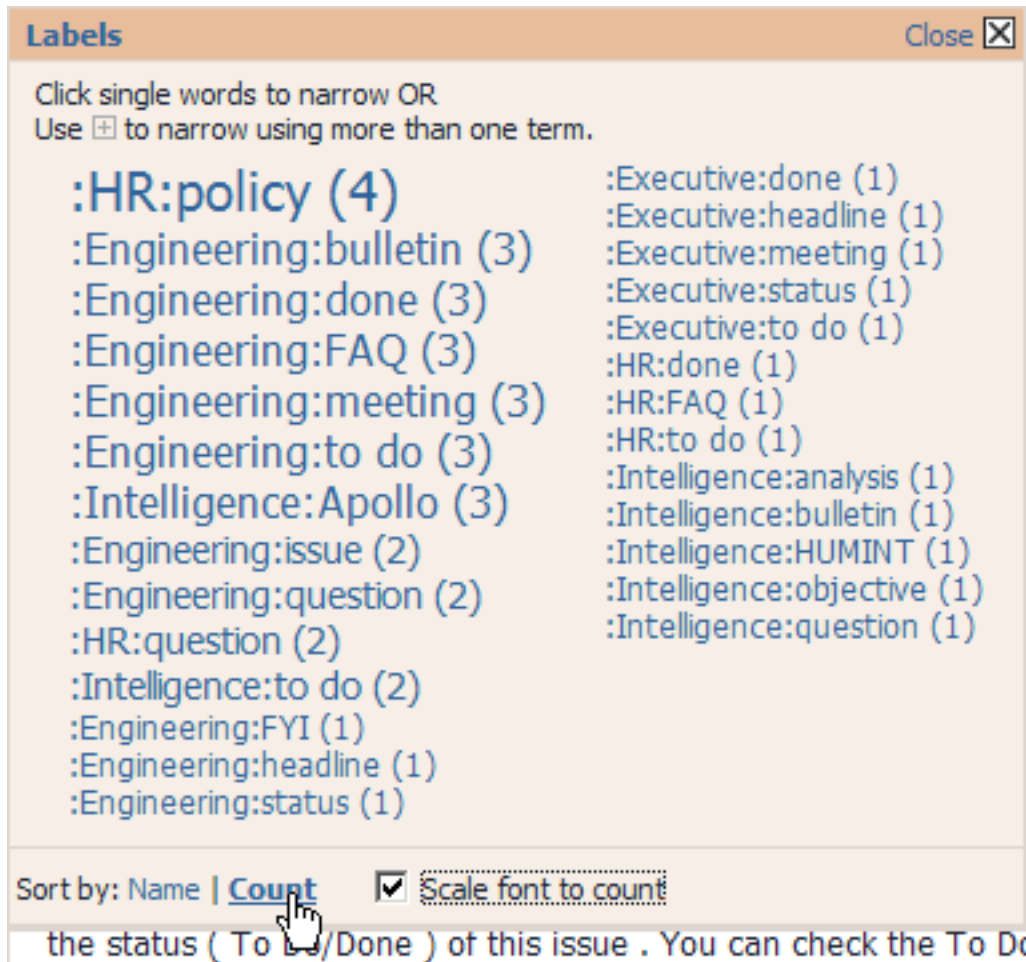
The "Sort by Name | Count" toggle lets you control how results are displayed.



Note that when sorting by name, labels are grouped by project, and are displayed in short form. When sorting by count, they are displayed in project-qualified form.

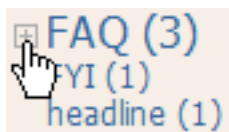
Clicking the "Scale font to count" checkbox displays more frequent matches in larger fonts.





## Advanced Search Filtering Using Navigators

You can create a filter that represents the combined effect of multiple terms from one of more navigators. To do this, click the + link next to the filter term. When you hover over the + link, a tool tip displays "add to multi-term filter".



When you click the +, a multi-term filter list appears at the top of the Narrow Results section, and the term you clicked is checked with a green checkbox.



### Narrow Results

#### Multi-term filter

Match:

☒ Any
 ☐ All
 ☐ None

Apply Filter

#### Keywords 95 more ▸

sample engineering (0.17)  
 engineering project (0.12)  
 server setup (0.10)  
 meeting note (0.10)  
 label (0.09)

#### Projects ▸

Engineering (20)  
 HR (8)  
 Intelligence (5)  
 Executive (2)

#### Labels 22 more ▾

:HR:policy (4)  
 :Intelligence:Apollo (3)  
 :Engineering:bulletin (3)  
 :Engineering:done (3)  
 :Engineering:meeting (3)

#### Types ▸

Article (23)  
 Attachment (6)

⌵ Show Controls

#### Searched for:

**Welcome to the Starter Journal - Read this First**  
 Engineering0 | September 27, 2005 | 2:32:18 PM EDT | Posted by  
 Thanks for trying Traction. This journal may provide a  
 for teams typically found in any organization.

**Sample Engineering and Executive Status Report**  
 Engineering4 | September 27, 2005 | 2:49:18 PM EDT | Posted by  
 This is a status report for the engineering team. It incl

#### Labels Close X

Click single words to narrow OR  
 Use ⊕ to narrow using more than one term.

Engineering	headline (1)	Apollo (3)
bulletin (3)	meeting (1)	bulletin (1)
done (3)	status (1)	HUMINT (1)
✓ FAQ (3)	to do (1)	objective (1)
FYI (1)	HR	question (1)
headline (1)	done (1)	to do (2)
issue (2)	FAQ (1)	
meeting (3)	<b>policy (4)</b>	
question (2)	question (2)	
status (1)	to do (1)	
to do (3)	Intelligence	
Executive	analysis (1)	
done (1)		

You can add as many terms as you like from as many different navigators as you like.



**Narrow Results**

**Multi-term filter**

:Engineering:FAQ  
:HR:policy  
Engineering  
sample engineering

Match:

☒ Any
☐ All
☐ None

Apply Filter

To remove a term, you can click the checkbox icon that replaced the [+] icon, or you can click the term in the list of Multi-term filters.

**Narrow Results**

**Multi-term filter**

:Engineering:FAQ  
:HR:policy  
Engineering  
☒ sample engineering

Match:

☒ Any
☐ All
☐ None

Apply Filter

You can then select whether you want to match any, all, or none of the filters.

- Any will display hits that match any of the filters.
- All will display only hits that match all of the filters. Note that some filters, such as projects, are mutually exclusive; if you choose more than one project and apply filters, you will be guaranteed to have no hits in your view.
- None will exclude hits that match *any* of the filters.

Pressing the Apply Filter button applies the filter as a single term.

Narrow Results

Multi-term filter

:Engineering:FAQ  
:HR:policy  
Engineering

Match:

☒ Any
☐ All
☐ None

Apply Filter

Keywords 95 more

sample engineering (0.17)

Searched for: Showing 1-24 of 24 hits in 0.351 seconds  
 Filtered by: Label :Engineering:FAQ OR Label :HR:policy OR Project Engineering (remove all filters)

You can repeat this process as often as you like.

## Saving Advanced Filters

If you create a complex filter that you find useful, you can bookmark the view and use it later as a search form. The filters are preserved on the URL and will be applied to subsequent searches launched from the view.

## Advanced Search Options

You can access the advanced search options by clicking the "show controls" link.

## Content types

You can control what types of documents are searched. Only hits in document types that are checked will be reported.

fast Search

Search Preferences  
FAST Setup

Type a few search terms or just click the search button to browse

Content types

Limit results by document type

☒ Articles (13)
☒ Comments (5)
☒ Attachments (6)

☒ Emails (0)
☒ Trackbacks (0)
☒ Shared Files (0)

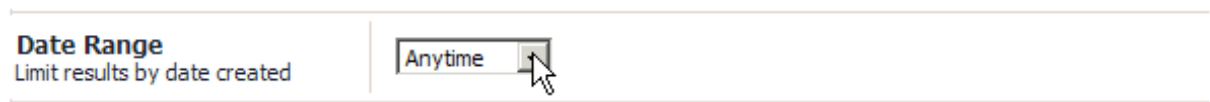
- *Articles* refers to normal top-level posts.

- *Comments* refers to comments on any article.
- *Emails* refers to documents that were either mailed directly into Traction, or to email messages sent from Traction, e.g. via "email articles" or "email reply".
- *Trackbacks* refers to trackback pings received by Traction.
- *Attachments* refers to documents attached to Traction articles
- *Shared Files* refers to documents associated with [Where are Files Shared and Managed in TeamPage](#).

## Date Range

This control let you filter search hits by date. For attachments and shared files, the date used is the last-modified time of the file. For all other content, the date used is the date when the content was posted to Traction.

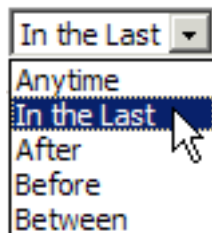
Normally the date range is set to "Anytime".



**Date Range**  
Limit results by date created

Anytime

You can select from the following options:



In the Last ▾

- Anytime
- In the Last
- After
- Before
- Between

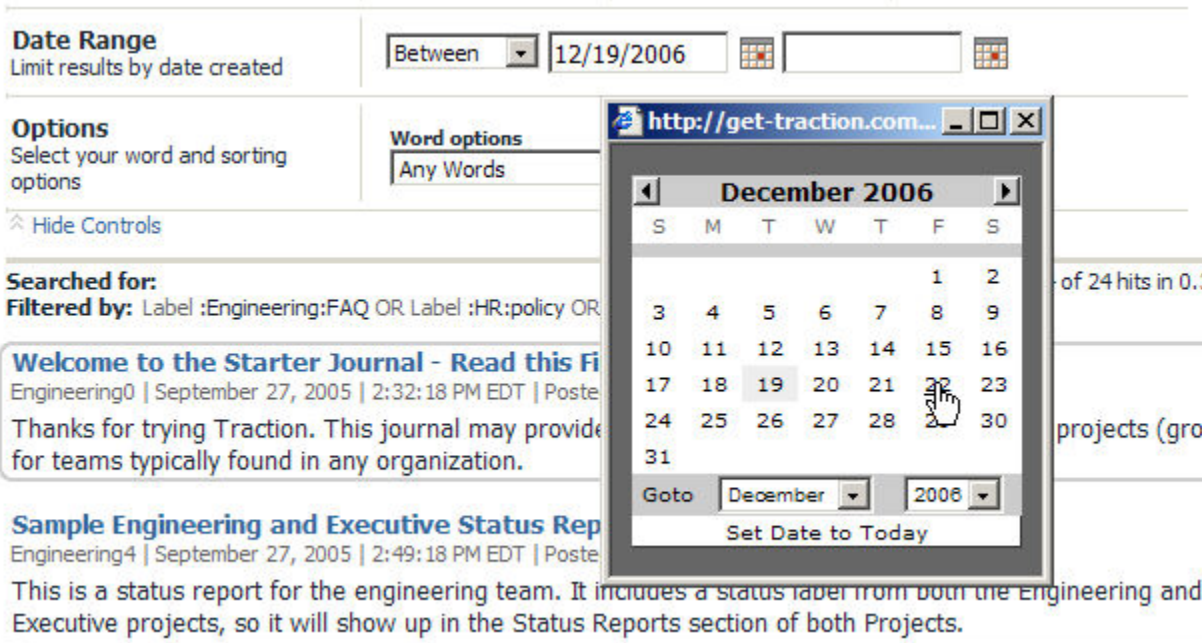
Each time you change your selection, the search interface adjusts to let you specify the additional information required, e.g.



**Date Range**  
Limit results by date created

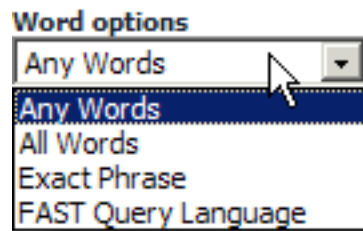
In the Last ▾ 60 days

When you choose before, after, or between you can click the calendar icon to display a calendar control that will let you enter the date.



## Word and Sorting Options

The following Word Options are supported:



- *Any* is the normal default. Results that match the most terms are ranked higher than results that only match a few of the terms.
- *All* requires that all the terms specified be present in hits.
- *Exact Phrase* only includes hits that match the search terms exactly as entered.
- *FAST Query Language* allows searches to be expressed in FQL, for those already familiar with FQL.

The following Sort Orders are supported;



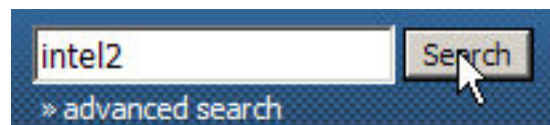
- *By Rank* uses an advanced algorithm that accounts for how closely the search terms match, how recent the post is, how many comments and labels the post has, and many other criteria.
- *Newest first* sorts the hits showing the most recent hits first, regardless of rank.
- *Oldest first* shows the oldest hit first, regardless of rank. This is often useful when you are trying to determine when you first learned about something.

## User Preferences

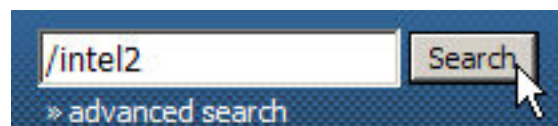
Individuals can control the sort order and set of navigators used for queries. See the [FAST Configuring Search Defaults](#) section for details.

## Rapid Selector Differences

When FAST Search is enabled, certain Rapid Selector expressions that do not otherwise require a preceding "/" will not be recognized unless preceded with a "/". For example, without FAST Search, you can enter a TractionID into the search box in order to jump to a specific article.



With FAST Search enabled, you must precede TractionIDs with a "/"; otherwise, they turn into a search for the TractionID.



## RSS and Atom Feeds

FAST Search views also support RSS and Atom syndication. If you have an RSS aggregator, you can subscribe to the results of any query using the RSS Feed and Atom Feed links at the bottom of the right column in any search results view.

## Using FAST Search with the Simple Skin

When you have the FAST Search option, the normal search box in the Simple skin will use InStream for searching.

Project:  Page:  Volume:   
 Date:    Slice:  Search:

You can also go to the FAST Search form by choosing *FAST Search* from the page selector and pressing the "go" button.

Project:  Page:  Volume:   
 Date:      
  
  
  
  
  
  
 Search:    
**Intelligence Ethics Bulletin** [bulletin]  
*Intelligence4: July 14, 2006 p*  
 An Intelligence project may include a Bulletin entry about the Ethics guidelines which will show in the Bulletins section regardless of the time slice selected. [More »](#)

The FAST Search form will appear. If you typed a search expression, hits for that search expression will be displayed. Otherwise, you can browse the journal contents by date or rank, similar to what you can do in the other skins.

Project:  Page:  Volume:   
 Date:    Slice:  Search:    
     
 Showing 1-2 of 2 hits in 0.0090 seconds  
 Searched for: journal  
**Welcome to the Starter Journal - Read this First**  
 Thanks for trying Traction. This journal may provide a good place to start, since...any organization. You can modify this journal by adding new Traction blogs for groups...the starter projects), or create a new journal from scratch whenever you like. Sample...  
 admin / [Engineering0](#) / September 27, 2005 / 2:32:18 PM EDT

If you have more than a single page of hits, you can use the footer to change the chunk size and sorting options.



| 1-25 | [more results](#)

show  per page,

[show all results](#)

Narrow Results:

You can also apply filters using the list of filters at the bottom of the page. For example, to filter hits by document type, you would first click the drop-down menu next to type:

### Narrow Results:

Keywords

Projects

Labels

Types

Authors

Names

Locations

Format

Select which filter you would like to activate:

Narrow Results:

Keywords

Projects

Labels

Types

Author

Names

Location

Format

If you like, you can select one of each type of filter. When you are ready to activate the filter, press the "Filter" button. You can repeat this process multiple times in order to build up a more complex filter.

Showing 1-3 of 3 hits in 0.07 seconds

Searched for:

Filtered by: Type Article

- └ Keyword "sample engineering"
- └ Label :Engineering:to do [\(Remove All Filters\)](#)

If you want to clear all the filters, you can click the "remove all filters" link.

Showing 1-3 of 3 hits in 0.07 seconds

Searched for:

Filtered by: Type Article

- └ Keyword "sample engineering"
- └ Label :Engineering:to do [\(Remove All Filters\)](#)

You can change the word options and sort order at the top of the search form.



## Open any Article Directly

Doc185: March 22, 2008 4:10 PM, Posted by Documentation Importer, Edited by Greg Lloyd

If you want to jump directly to any single entry view, just type the */TractionID* ( Forward slash Project name and article number - as one word, not separated by blanks) in the *Search* box and click *Search* or hit the enter key. This is the simplest and one of the most useful [Traction Rapid Selector](#) commands.

For example, to jump quickly to article *HR5* type */HR5* in the *Search* box and click *Search*. This is very handy when you are talking on the phone with another team member. Say "HR5" just as you might say "See Invoice 488" in an order entry system, and the person at the other end of the phone can jump directly to the article you're discussing.



The result is a single entry view of the specified *article*.

## Recruiting and Hiring Policy

policy

HR5 | June 5, 2006 | 11:35:25 AM EDT

Posted by admin

All new hires and promotions must go through the same hiring process:

1. Call for internally sourced promotions or job changes
2. Call for external new hires
3. Review by committee
4. Review by hiring manager
5. Background check
6. Contracting

---

### Article Comments

Add a Comment on this Article

**B** *I* U ABC |
 [List Icon] [List Icon] |
 [Align Left Icon] [Align Right Icon] |
 [Link Icon] [Image Icon] |
 Paragraph [v]
 [Emoji Icon] [ab] HTML [Help Icon]

Post Comment
in the project
HR [v]
[Comment Icon] [Dropdown Icon]

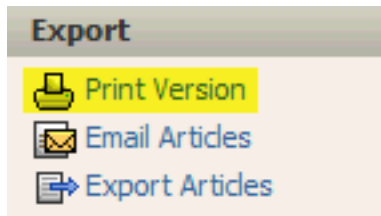
---

## Printing Traction Articles

Doc205: March 22, 2008 4:12 PM, Posted by Documentation Importer

Traction includes a special print skin which reformats articles for optimal printing. There are options to expose or hide metadata (including author, date, labels, and so forth), change the volume (details vs. brief or full content levels) and even to redact articles, paragraphs or comments from a print-out.

From any single or multi-entry view, click the *Print Version* link in the Export Tools menu to access this special black and white print skin.



This yields a plain view of the article(s) in your view, at the volume level (Titles/Details, Brief, Full) which was selected when you clicked Print Version.

Choose Send to Printer from the tool bar to print the articles as they appear (the tool bar will not be included). Or there are several options described below which can change your output.

[Advanced >>>](#)

[Send to Printer](#) | [Open This View \(Non-Print Version\)](#) | [Edit Defaults for Print Version Skin](#)  
(These controls will not be printed.)

Volume Control: Full content

### What is a Bulletin?

Engineering33: June 6, 2006; 4:06:14 PM EDT  
 Posted by admin

*bulletin*  
*FAQ*

The Bulletin label and corresponding section is used like a bulletin board to show key group information, regardless of how new or old it may be. If you navigate forwards or backwards in time, the contents of other sections may change to reflect the selected time period, but the Bulletins section will stay the same. 01

The Bulletin section is ordered chronologically, though you may want to change to an alpha sort (in Server Setup | Defaults, bottom of the page, or in Project Setup | Display). 02

### Frequently Asked Questions

Engineering47: June 6, 2006; 3:57:38 PM EDT  
 Posted and Edited by admin

*bulletin*  
*FAQ*

This article includes a section which contains an alphabetically sorted list of article titles marked with the Engineering project FAQ label. The section is also configured to include a button users can click to add an FAQ. You may also add an FAQ to any other article in the system. 01

### FAQs - Titles Sorted by Alpha

#### Frequently Asked Questions

#### How Many Pickles in a Peck?

#### What is a Bulletin?

02

### How Many Pickles in a Peck?

Engineering36: May 1, 2006; 10:54:35 PM EDT  
 Posted by admin  
 3 Cross References | 1 Comment

*done*  
*FAQ*  
*question*

Peter wants to know! 01

#### Article Comments

As it turns out, there are 120 to 140 pickles in a peck. A Traction customer in the food business answered this for us when they deployed in Summer 2003.

admin / Engineering37 / May 1, 2006 / 10:55:45 PM EDT

## Advanced Printing Options

Click the Advanced button to expose the printing options. As you uncheck the boxes, the print view will instantly update to reflect the choices you are making.



Advanced <<<

Content Options

☒ Show Traction IDs
 ☒ Show Post Date and Time

☒ Show Author
 ☒ Show Cross References / Attachments / Comments Summary

☒ Show Labels
 ☒ Show Label Icons

☐ Highlight Matching Items (Topic & Search Views)
 ☒ Show Mail Headers and Other Post Info

☒ Show Item IDs
 ☒ Show Cross Reference Lists

☒ Show Attachments
 ☒ Show Comments

☐ Limit Comment Depth to  levels

Style Options

Font Face:

Font Size:

[Send to Printer](#) | [Open This View \(Non-Print Version\)](#) | [Edit Defaults for Print Version Skin](#)  
(These controls will not be printed.)

Volume Control

## Redacting Articles, Paragraphs and Comments from the Print View

If you want to redact one article from a multi-entry print view, or you want to redact a paragraph or comment, you can hover your mouse over the relevant item and uncheck the box which appears next to it.

In this example, the second paragraph in the *What is a Bulletin* article has been redacted. In the view it appears ~~struck-out in light grey~~ but in the actual print-out it will not appear.

traction

FAQ: September 27, 2005 - August 30, 2006

**What is a Bulletin?**  
 Engineering53: June 6, 2006; 4:06:14 PM EDT  
 Posted by admin

bulletin  
 FAQ

The Bulletin label and corresponding section is used like a bulletin board to show key group information, regardless of how new or old it may be. If you navigate forwards or backwards in time, the contents of other sections may change to reflect the selected time period, but the Bulletins section will stay the same. 01

The Bulletin section is ordered chronologically, though you may want to change to an alpha sort (in Server Setup | Defaults, bottom of the page, or in Project Setup | Display) ->

---

**Frequently Asked Questions**  
 Engineering47: June 6, 2006; 3:57:38 PM EDT  
 Posted and Edited by admin

bulletin  
 FAQ

This article includes a section which contains an alphabetically sorted list of article titles marked with the Engineering project FAQ label. The section is also configured to include a button users can click to add an FAQ. You may also add an FAQ to any other article in the system. 01

## The Collector

Doc287: March 22, 2008 4:21 PM, Posted by Documentation Importer, Edited by Jordan Frank

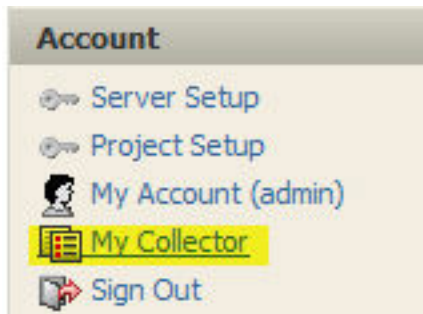
The Collector is like a personal shopping cart or bookmarker, but it lets you gather Traction articles and

comments, order them, and then take certain actions on them.

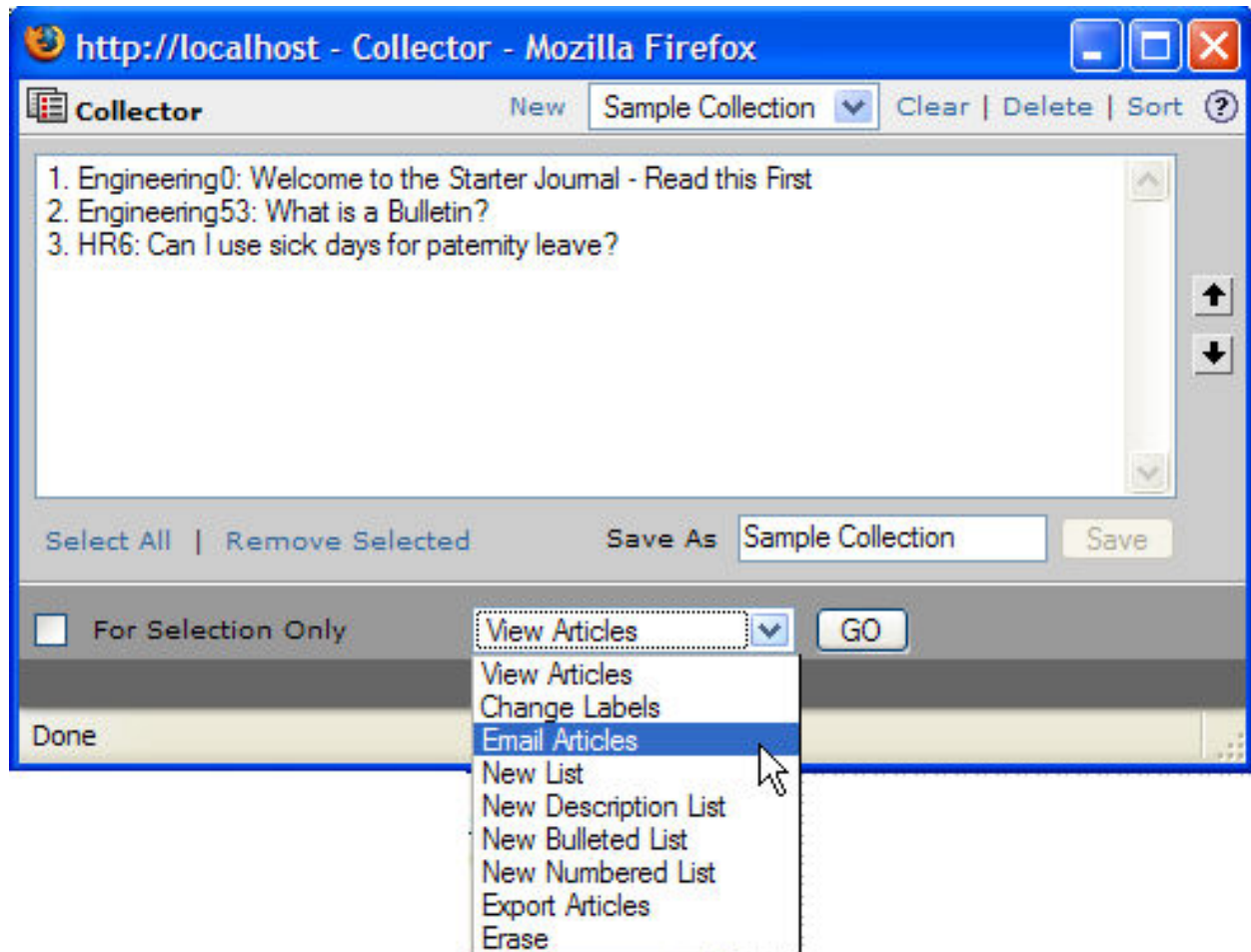
Administrators may also use controls to specify user collections which may also be used to control front page and newspaper [sections](#) or to indicate a controlled list of articles to use as publishing templates.

### ***Open the Collector***

You can open your Collector by clicking My Collector in the Account menu.



The Collector pops up with your most recently selected collection. This one, Sample Collection, has 3 articles selected.



The controls in the upper right allow you to make a new collection, clear the contents of the selected collection, delete this collection, or sort the collection (alphabetic or chronological). You can also sort by selecting titles and using the Up/Down arrows.

You can save a number of collections under different names. If you remove or reorder items, the arrow next to Save As turns red, meaning that you need to click it to save your changes before taking any action.

There are as many as 9 actions (if you have Erase permissions, otherwise 8 options) which you can perform from the collector.

## ***What can I do with my Collections?***

Once articles are in your collector, you can do any of the following actions:

- **View Articles:** View the articles in a multi-entry view
- **Change Labels:** Change the labels on all of them (for example, remove all *headline* labels, replace with *news* labels). See [Reclassify \(Change Labels\) Articles or Paragraphs](#)
-

**Email Articles:** Email all articles to someone that may or may not have access to Traction. The form lets you choose a project, decide whether to keep links back to Traction, and decide whether to post the contents of your email to Traction. See [Email Articles From Traction](#)

- **New List, Description List, Bulleted List, Numbered List:** All these options will open a Compose New Article form and will include a list of Traction IDs of the selected articles in the window. Depending on the option you chose, it will wrap HTML formatting around the article links. See [Publishing to Traction](#) section for tips on how to use this form.
- **Export:** Traction will generate a WordML or PDF briefing book including the selected articles. If these articles use Traction hyperlinks to reference other Traction articles, those referenced articles can also be included. It can actually include several levels of incoming or outgoing references. See [Exporting Articles](#)
- **Erase Articles:** If you have Remove Article permissions for a project, then you will have the option to erase articles. Be careful, this may remove the article and (depending on your choices) any previous edits. See [Erasing](#)

Note on *For Selection Only* option: If you highlight some of the articles in your Collector, check *For Selection Only*, and select an action, then the action will only process the selected articles.

More Instruction on the *Change Labels*, *Email Articles*, and *New List* options are provided in various parts of the [Publishing to Traction](#) sections of this guide.

You can also specify a collection to use in a section, as described in [Sections Overview](#).

## ***How do I add articles into the Collector?***

If you are in a single entry or multi-entry view, a *Collect Articles* Tool appears in the right column. Clicking this will put all articles that you can see into the currently selected collection.

Alternately, you can hover over an article or paragraph and then right-click to select Collect action from the context menu. The Context Menu allows you to choose the most recently viewed collection, choose a different collection or make a new collection. The Paragraph option will put a reference to the paragraph number (for example, Engineering53.03)

## FAQ

Add to This Topic

June 6, 2006

### What is a Bulletin?

bulletin  
FAQ

Engineering53 | June 6, 2006 | 4:06:14 PM EDT  
Posted by admin

The Bulletin label and corresponding section is used like a bulletin board to show key group information, regardless of how new or old it may be. If you navigate forwards or backwards in time, the contents of other sections may change to reflect the selected time period, but the Bulletins section will stay the same.

The Bulletin section is ordered chronologically in an alpha sort (in Server Setup | Defaults, bottom Display).

want to change to an  
Project Setup |

### Frequently Asked Questions

Engineering47 | June 6, 2006 | 3:57:38 PM EDT  
Posted and Edited by admin | View edit history

This article includes a section which contains information marked with the Engineering project FAQ label. A button users can click to add an FAQ. You can also use the system.

#### FAQS - TITLES SORTED BY ALPHA

[Frequently Asked Questions](#)  
[How Many Pickles in a Peck?](#)  
[What is a Bulletin?](#)

### How Many Pickles in a Peck?

- Paragraph
  - Action
  - Add to Section
  - Add Label
  - Change Labels
- Collect
  - Sample Collection
  - Recent Collections
  - All Collections
  - Choose
  - New Collection...
- Comment
- Article
  - Change Labels
  - Edit Article
  - Email Article
- Collect
- Comment
- Email Reply
- Visibility
- Export Articles
- Erase Article
- Page
  - Change Labels

**Internet Explorer users:** from anywhere in the interface, you can just drag the title of any Traction entry into the Collector.

---

## ***Exporting Articles***

Doc99: March 22, 2008 3:58 PM, Posted by Documentation Importer

The Export Articles feature allows you to make a PDF or WordML document from any set of articles or comments you select. The exporter allows you to select whether you want to include a title page and table of contents and offers many other choices including header and footer options, whether to include comments and labels, and whether to include cross referenced articles in the appendix. You can even selectively redact articles, paragraphs, and comments from the output.

The WordML format can be opened in Microsoft Word or any other editor conforming to the WordML standard.

### ***Selecting Content to Export***

You can export articles from a single or multi-entry view or from the Collector.

#### **Exporting Articles from a Single or Multi-Entry view.**

In this example, the Issue label in the Engineering project has been selected. From here, you can click the Export Articles link in the Export menu:



traction

Front Page > Engineering > Issue

Search

> advanced search

**Projects**

**Engineering (73)**

Executive (4)

HR (19)

Intelligence (5)

**Engineering**

**Sections**

Headlines

Status Reports

Meeting Notes

Issues To Do

Questions To Do

Recent Articles

Bulletins

Recent To Do

Recently Done

**Labels**

bulletin (3)

done (3)

FAQ (3)

FYI (1)

headline (1)

**issue (2)**

meeting (1)

question (2)

status (1)

to do (3)

**On This Page**

done (1)

issue (2)

to do (1)

**Engineering** » Recent Articles | Recent Comments | All Recent

Added | By Label Removed

issue » By Label | By Label

Show Full content with comments Expanded

**issue**

Add to This Topic

May 1, 2006

**Testing Unit Delivery Delayed**

Engineering39 | May 1, 2006 | 10:58:21 PM EDT

Posted by admin

Cross References | 1 Comment

With notification of this delay by phone today, we find ourselves in a pickle (or a peck of pickles, see Engineering36: How Many Pickles in a Peck?). We will need to manage adjust client expectations or face a charge on the BigCo account.

**Article Comments**

The shipper says we can expedite the delivery if we pay for saturday delivery. Issue closed!

admin / Engineering40 / May 1, 2006 / 10:59:07 PM EDT

September 27, 2005

**Sample Engineering Issue**

Engineering11 | September 27, 2005 | 4:58:30 PM EDT

Posted and Edited by admin | View edit history

Cross References

This is an *issue* posted to the Engineering project. It also has the label *To Do* which is a simple way you can track the status (*To Do/Done*) of this *issue*. You can check the *To Do* checkbox to turn the *To Do* label to *Done*. To expand on this idea, you may want to create and apply priority level labels too (p1, p2, p3). This post will appear on the *Issues To Do* section of the Engineering NewsPage and also in the *Recently To Do* section.

**Date Range Selector**

Active Years

2005

2006

Go to Today

**Article Tools**

Add New Article

**Export**

Print Version

Email Articles

Export Articles

**Page Tools**

Collect Articles

Change Labels

Erase Articles

**Account**

Server Setup

Project Setup

My Account (admin)

My Collector

Sign Out

**Sidebar Shortcuts**

This article (Engineering13: Sidebar Shortcuts) is set as the default *Sidebar Article*. Click on the title *'Sidebar Shortcuts'* and edit this article to include useful shortcut links.

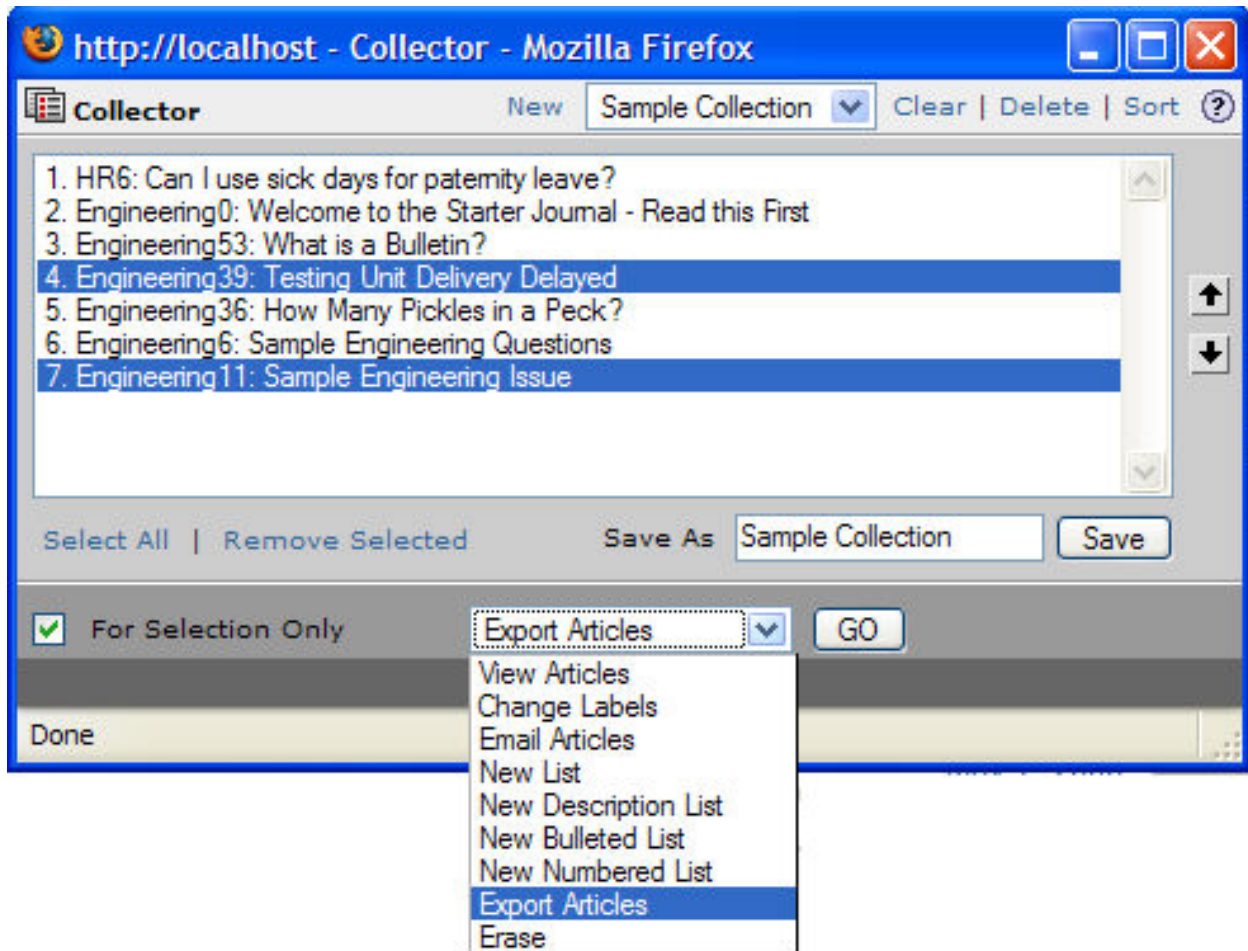
You can change the server *Sidebar Article* in *Server Setup / Defaults* and over-ride it in each project in *Project Setup / Display*.

Shortcut links to Resolved Issues and Questions:

- Resolved Issues

## Exporting Articles from the Collector

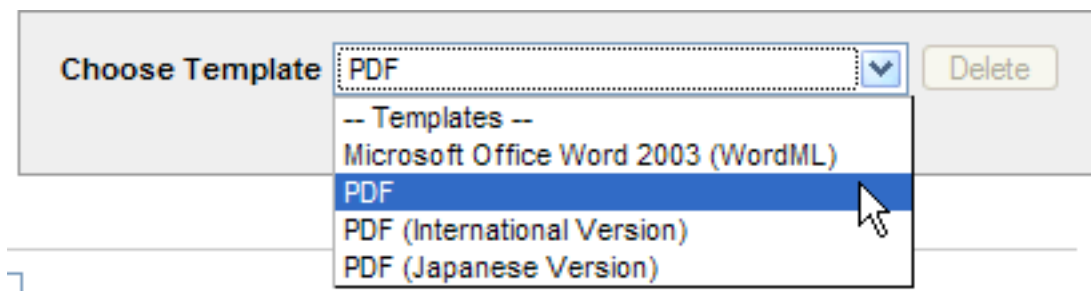
In this example, the same two articles are in the Collector (along with a few others). Since we only want to Export two of the articles in the collection, the two are highlighted and the For Selection Only box is checked. Finally, the Export Articles option is selected:



### ***The Export Articles Dialogue***

After you click to Export Articles, the Export Articles dialogue appears. The dialogue is quite long so it is divided into pieces here:

**Select the template or format.** The Default format is PDF but you can also choose WordML. At the very bottom of the main dialogue, you can choose to save your settings into a template which you may select the next time you (or anyone else) exports articles.



Adjust the page setup and orientation:

## Page Setup

### Paper Size

Default (Letter / A (8½" × 11"))

Choose from a list of common paper sizes.

Dimensions are included in the form (width × height) with the appropriate units.

### Paper Orientation

Default (Portrait)

Top 1

Left 1 11 in

Right 1

8.5 in

Bottom 1

**Specify the page Header and Footer text:** The logo is selected further down in the dialogue. You can put your cursor in any box and click one of the buttons to insert a field.

## Header and Footer

The header and footer are displayed at the top of each page. To refer to a dynamically generated value in the header or footer, use the syntax [*valuenam*]; you can also click the appropriate buttons to add the values of your choice. The sup logo, for the server default for project logo or specified elsewhere; copyright, for the copyright message specified in Ser pages, for the total number of pages in the document; author, for the name of the user who generated the exported docu specified elsewhere or by the name of the collection to which the exported articles belong, when applicable.

Left Header	Center Header	Right Header
[logo] [title]		[copyright]
Left Footer	Center Footer	Right Footer
		Page [page] of [pages]

**New Page for Each New Article:** The default is No, but your output may look cleaner if you select yes.

## New Page for Each New Article Default (no) ▼

*Indicates whether each article should be reprinted on its own page. This that reference them (only to top level articles, or cross referenced articles)*

**Table of Contents, Selected Articles and Cross Referenced Articles Titles:** These titles will appear on the Table of Contents Page (if you choose later on to include one) *and* (for Selected Articles and Cross Referenced Articles) at the beginning of each section of the document. These titles will also appear in the left column index in the PDF output.

### Table of Contents Page Title Table of Contents

☒ Use Default Value (Table of Contents)

*Indicates the title that should be given to the table of contents page, if one is to be rendered. The name of the collection exported will be substituted for all occurrences of the {0} formatting parameter.*

### Selected Articles Section Title Selected Articles ({0})

☒ Use Default Value (Selected Articles ({0}))

*Indicates the title that should be rendered at the head of the main selected articles section. The name of the collection exported will be substituted for all occurrences of the {0} formatting parameter.*

### Cross Referenced Articles Section Title

Appendix: Cross Referenced Articles

☒ Use Default Value (Appendix: Cross Referenced Articles)

*Indicates the title that should be rendered at the head of the cross referenced articles section, if it is rendered as an appendix. The name of the collection being exported will be substituted for all occurrences of the {0} formatting parameter.*

**Auxiliary Pages and Sections:** Here, you can select whether to include a Title Page (default is No, when you check the box the Title and Title Page Message boxes appear).



## Auxiliary Pages and Sections

---

### Include Title Page ☒

*Indicates whether a title page should be included in the document. It will include a title, an optional logo name, the date and time the document was created, and an optional message at the bottom of the page.*

#### Title

*This text will be used as the title on the title page, and anywhere else the title is rendered. The name being exported will be substituted for all occurrences of the {0} formatting parameter.*

☐ Use Default Value

My Great Document

#### Title Page Message

*This message will be displayed in its entirety in a block at the bottom of the title page.*

This document includes articles labeled Issue from the Engineering Project. Enjoy!

### Include Table of Contents Default (yes) ▼

*Indicates whether a page should be included that lists the articles in the document.*

**Style Setup:** Select the font type, font size and, if you want one, the logo image to include. You can upload a new logo as needed if the one you want is not already on the server.

## Style Setup

Font Face

*Indicates which font face should be used to render the document. The Courier, Helvetica, and Times fonts are available for viewing in a PDF document. The Gothic and Mincho fonts are embedded in the output document and must be installed on the system where the document is being viewed, and be available and known to the viewer to display correctly. Non-ANSI characters will not display correctly with any of these fonts except Helvetica and Mincho. Content cannot be reliably copied from a document that uses Gothic or Mincho.*

Font Size

*The descriptions for the font sizes refer to the sizes of the article details, normal content and header/footer, respectively. Other sizes needed to render the document, such as for items whose HTML versions use head, are based upon these values. All sizes are in points.*

Logo Image

*Allows the user to specify the logo to be used wherever a logo is to be included in the document.*



*If none of available logos are suitable, you can upload an image. It will be saved in the project logos directory and used in all future export operations, and will be used immediately in any export or save operation. If you upload a file as an existing file, the existing file will be overwritten.*

**Show Comments:** You can decide to include comments on articles. As desired, you can limit comment depth to a designated number of levels. Comment depth applies to cases where comments are made within comments. If there is a stack of comments (all made on the article or paragraphs within it), they will all appear.

Show Comments

*Indicates whether comments should be included inline beneath the content to which they refer.*

Comment Depth ☐ Limit depth to  levels

*Indicates the depth to which comments on comments will be included.*

**Include Cross Referenced Articles:** You may include articles referenced by the selected articles, articles that reference the selected articles, or you may decide not to include any cross referenced articles. If you select one article that links to 3 articles which in-turn link to 5 more articles, then 2 levels of cross reference depth will include all 9 in the document produced.



**Include Cross Referenced Articles** Default (Include Articles That the Selected Articles Reference) ▼

**Cross Reference Depth** ☐ Limit depth to 1 levels (Maximum 4)

*Indicates how deeply the cross reference network should be explored to find cross referenced articles to be included.*

**Cross Referenced Articles Location** Default (As an Appendix) ▼

*Indicates where cross referenced articles should be included in the final document.*

The Cross Referenced Articles Location allows you to select whether the articles appear in the appendix or after each article in the body of the document that is produced.

**Omit Specific Content:** When you click this button, you will get an interactive view of the selected articles and comments. As in the [Printing Traction Articles](#) view, You can selectively redact articles, paragraphs and comments from the document which will be produced.

**Omit Specific Content**

Edit Exclusion List

*Launch the editor and choose what paragraphs, comments,*

Here is a portion of the view you would see. As you hover over portions of the view, checkboxes appear. In this case, the first paragraph in the How Many Pickles in a Peck article is redacted. It will not appear in the document you produce.

## How Many Pickles in a Peck? ✓

*Engineering36: May 1, 2006 10:54:35 PM EDT, Posted by admin*

Peter wants to know!

## re: How Many Pickles in a Peck?

*Engineering37: May 1, 2006 10:55:45 PM EDT, Posted by admin*

As it turns out, there are 120 to 140 pickles in a peck. A Traction customer in the food business answered this for us when they deployed in Summer 2003.

**Show Labels:** You can choose to show or exlude labels from the document.

**Show Labels** Default (no) ▼

*Indicates whether labels should be include*

**Include Lists of Cross Referenced Articles and Attachments:** This will control whether the lists of cross references and lists of attachments are displayed after each article in the document. If Cross Reference lists are included but the Cross Referencing articles themselves are not included, the links that

are produced may be live links back to the server (unless you turn that setting off further down in the dialogue). Any links to articles that are ultimately contained in the document will link *within* the document.

**Include Lists of Cross Referenced Articles** Default (List All Cross Referenced Articles) ▼

*Indicates whether each article should be followed by a list of cross referenced articles, and whether the list should include all related articles, all articles referenced by the given articles, all articles that reference the given articles, or whether the lists should be left out entirely.*

**Include Lists of Attachments** Default (no) ▼

*Indicates whether each article should be followed by a list of its attachments.*

Since attachments are not included in the document output, the default is set to no.

**Include Links into Traction:** Setting this to yes will make live links out to referenced articles which are not included in the document. Links to articles that are contained within the document will jump directly to those articles, rather than linking back to the server.

**Include Links into Traction** Default (yes) ▼

*Indicates whether any links should be included in the final document. Only links that refer to other articles within the document will be included.*

**Image Resolution:** If there are images embedded in the articles, this control helps to reduce the size of the document.

**Image Resolution** 72 dpi ☒ Use Default Value (72 dpi)

*Indicates the resolution, in dots-per-inch, in which any images include values are 72, 96, and 150.*

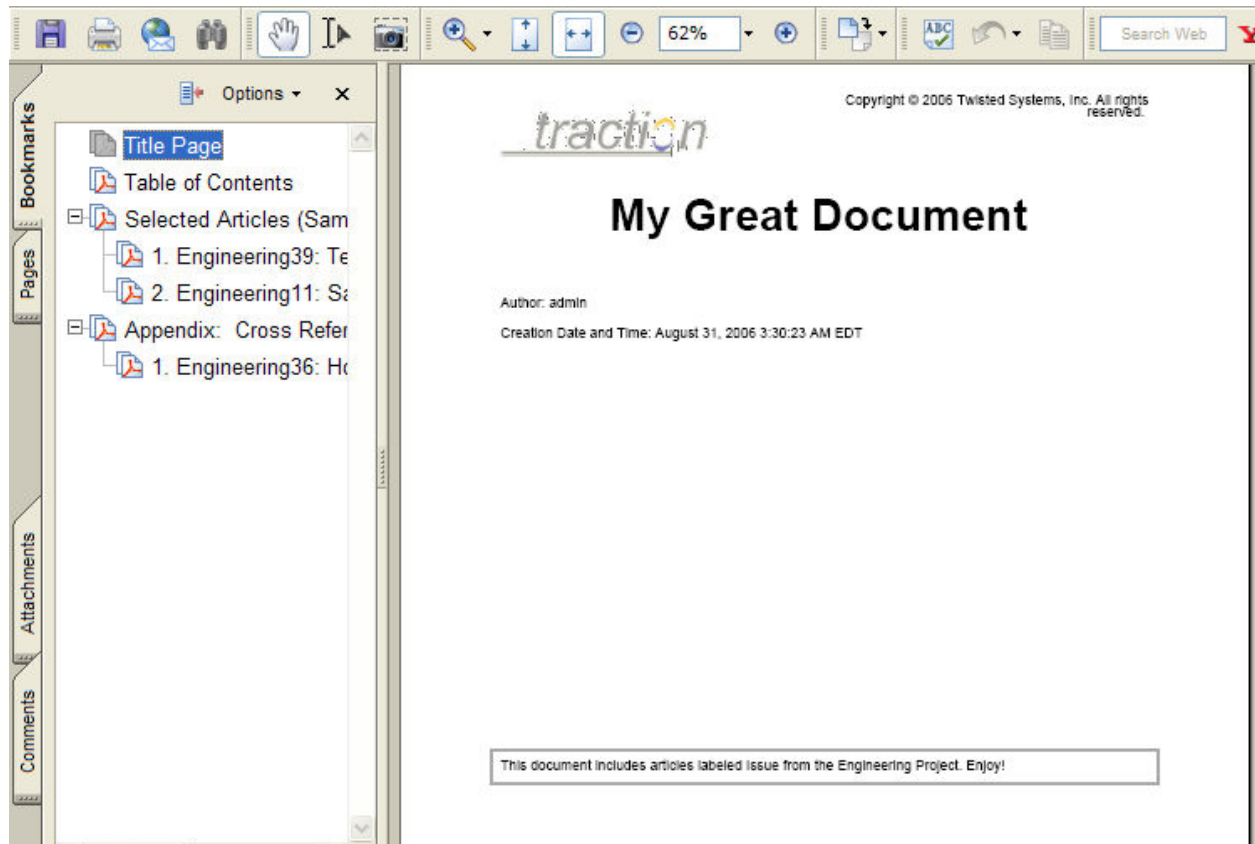
**Save Template:** If you want to use your settings again, you can choose to save them as a template (which you can select later in the upper right of this dialogue. Selecting "Share" will make your template available to others on this server. Fill in a template name and click Save.

Share This Template ☒ Save as  Save

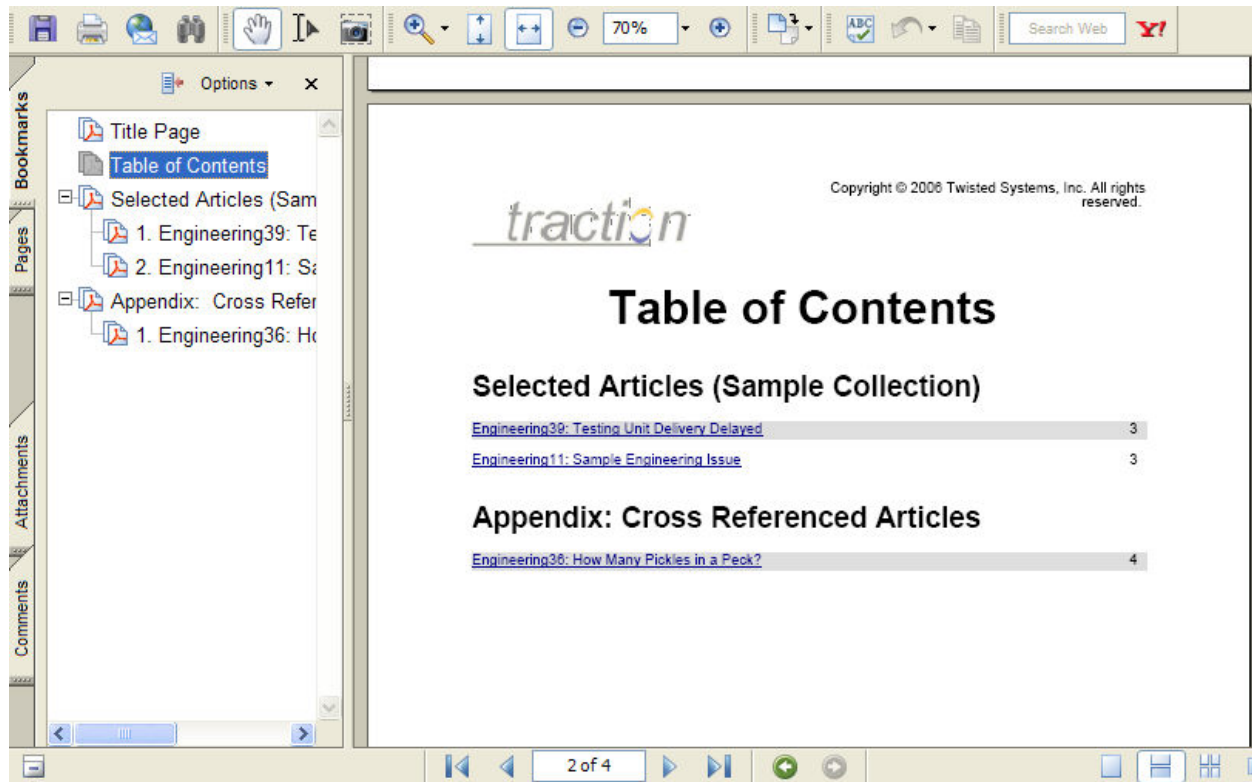
And Finally... **Preview or Download your Document:** In the case of PDF, you can Preview the PDF or just Download it. In the case of WordML output, the Preview button will show you the raw XML output.

Export File Name: Sample Collection Preview Download Close

Ta da... Here are images of the resulting PDF. The first image shows the document index on the left with the Title Page selected. The Title Page is in the body.



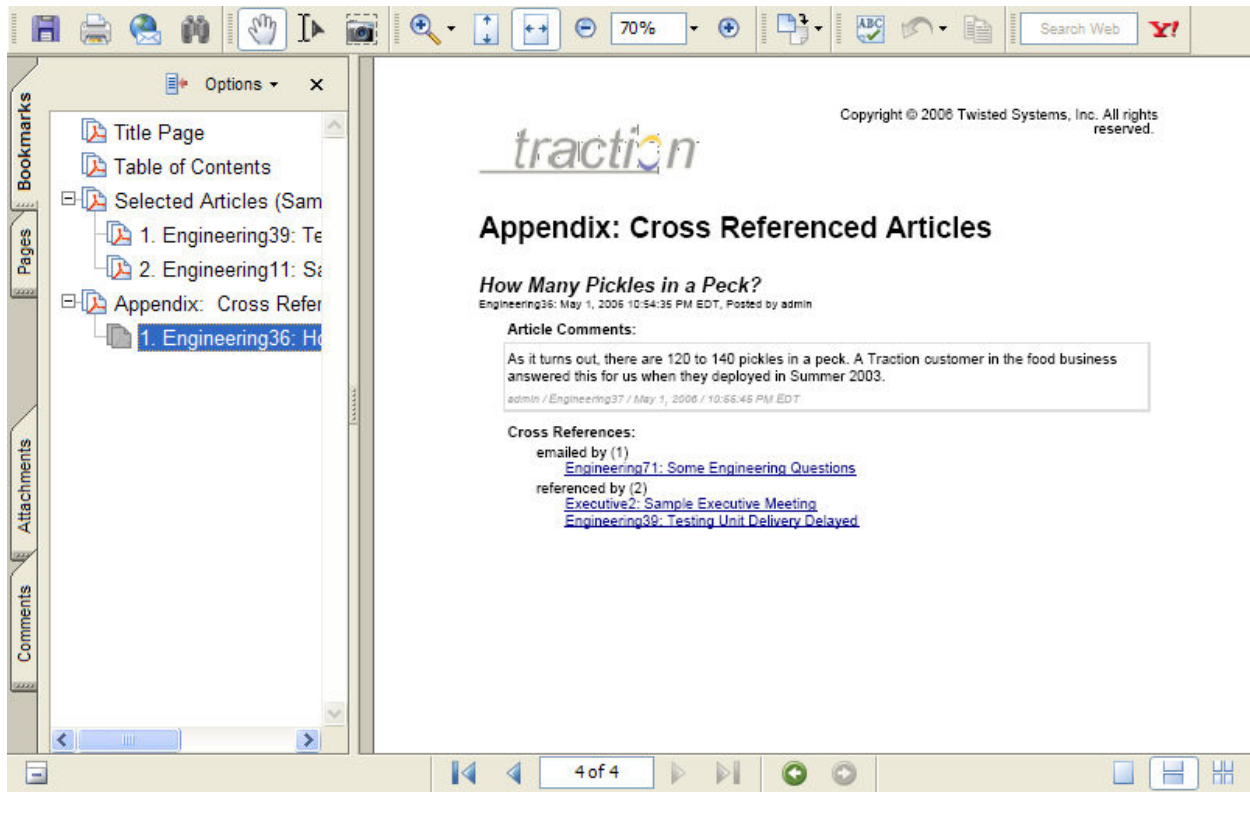
This image shows the document index on the left and the Table of Contents in the body. You can see that it includes the two articles that were selected originally, and one article in the appendix.



And here is the document body starting at Selected Articles. You can see the two articles, one including a comment and both including Cross References and their associated backward or forward links.

The screenshot shows a web application interface. On the left is a sidebar with a 'Bookmarks' section containing links to 'Title Page', 'Table of Contents', 'Selected Articles (Sample Collection)', '1. Engineering39: Te...', '2. Engineering11: Sa...', 'Appendix: Cross Refer...', and '1. Engineering36: Ho...'. Below this are sections for 'Pages', 'Attachments', and 'Comments'. The main content area is titled 'Selected Articles (Sample Collection)' and contains two articles. The first article is 'Testing Unit Delivery Delayed' by Engineering39, dated May 1, 2006. It includes a paragraph about a delivery delay and a link to 'Engineering36: How Many Pickles in a Peck?'. Below the article is a comment box with the text 'The shipper says we can expedite the delivery if we pay for saturday delivery. Issue closed!' and a timestamp. The second article is 'Sample Engineering Issue' by Engineering11, dated September 27, 2005. It includes a paragraph about an issue and a link to 'Intelligence0: Sample "Apollo" Intelligence Objective (or KIT)'. Both articles have 'Cross References' listed below them. The interface includes a top toolbar with various icons and a search bar, and a bottom toolbar with navigation controls and a '3 of 4' indicator.

And finally, here is the appendix including the How Many Pickles in a Peck article. Notice that it is missing the paragraph that we redacted.



## ***Traction Executive Summary Digest***

Doc296: March 22, 2008 4:22 PM, Posted by Documentation Importer

### **Email Digest**

The email digest is an automatically generated, permission filtered summary view sent to each subscribing user on a regular basis – daily, weekly, every other day and twice on Friday – you choose. It summarizes the activity in Traction since your previous digest, up to a week back in time. The digest is available in both HTML (by default) and text formats.

The digest is configured by the server administrator and most settings can be adjusted by each user in User Setup | Preferences - [Personal Digest Information](#). The administrator may set:


- Whether to send a scheduled digest \*
- What email is used as the from address
- What day(s) and time(s) to send it \*
- Which projects may be included
- Which projects are included by default \*
- What sections to include \*





All items with a \* allow user over-ride.

The digest is split into two columns as you see below.



## Traction Starter Journal Digest

### Headlines & News

#### Welcome to the Starter Journal - Read this First

admin / Engineering0 / September 27, 2005 / 2:32:18 PM EDT / 0 Comments

Thanks for trying Traction. This journal may provide a good place to start, since it includes projects (group blogs) for teams typically found in any organization. You can modify this journal by adding new Traction blogs for groups in your organization (you can also turn off the starter projects), or create a new journal from scratch whenever you like. Sample content has been loaded into each project and some setup options have been used to configure each project to give you a jump start and a few examples. Please click the title of this article to read more.

#### Engineering Articles

##### What is a Bulletin?

admin / Engineering33 / June 6, 2006 / 4:06:14 PM EDT / 0 Comments  
[bulletin, FAQ]

The Bulletin label and corresponding section is used like a bulletin board to show key group information, regardless of how new or old it may be. If you navigate forwards or backwards in time, the contents of other sections may change to reflect the selected time period, but the Bulletin section will stay the same.

---

##### Frequently Asked Questions

admin / Engineering47 / June 6, 2006 / 3:57:38 PM EDT / 0 Comments  
[bulletin, FAQ]

This article includes a section which contains an alphabetically sorted list of article titles marked with the Engineering project FAQ label. The section is also configured to include a button users can click to add an FAQ. You may also add an FAQ to any other article in the system.

#### Executive Articles

##### Sample Executive Idea, cross labeled to Engineering

admin / Executive0 / June 6, 2006 / 4:12:58 PM EDT / 0 Comments  
[:Engineering:PV1]

This is a sample article in the Executive project. Perhaps I had an idea following reading Engineering4: Sample Engineering and Executive Status Report, and decided to share it with the Executive project members. At the time or thereafter, I wanted to share it with the Engineering group.

#### HR Articles

##### re: Does the 401K policy allow for roll-overs

admin / HR7 / June 5, 2006 / 11:38:04 AM EDT / 0 Comments

The powerpoint attached to HR1: 401K Policy explains your options for changing your 401K after you leave the company. The short answer, however, is YES.

---

##### Can I use sick days for paternity leave?

admin / HR6 / June 5, 2006 / 11:36:58 AM EDT / 0 Comments  
[question, to do]

I will go on paternity soon and wonder if I can be paid for the time I will be out of the office. Is it possible to use my sick days during this period of time?

#### Intelligence Articles

##### Intelligence Ethics Bulletin

admin / Intelligence4 / July 14, 2006 / 10:42:22 AM EDT / 0 Comments  
[bulletin]

An Intelligence project may include a Bulletin entry about the Ethics guidelines which will show in the Bulletin section regardless of the time slice selected.

---

##### Sample Intelligence Analysis on Apollo Objective

admin / Intelligence3 / July 14, 2006 / 10:34:25 AM EDT / 0 Comments  
[analysis, Apollo]

This sample analysis has the Analysis label to categorize it as an analysis report and the Apollo label to associated it with the Apollo objective defined at Intelligence0: Sample "Apollo" Intelligence Objective (or KIT).

#### Welcome to the Digest

This is the email digest. It contains a summary of activity in the Traction Starter Journal Journal for the time period September 27, 2005 through August 23, 2006.

#### Active Projects

Engineering (14 articles)  
HR (6 articles)  
Intelligence (3 articles)

#### Active Discussions

Does the 401K policy allow for roll-overs (1)

[Front Page](#) | [Edit subscription](#)

You are subscribed with e-mail address.

Powered by Traction

Traction® is a registered trademark of Traction Software, Inc. For more information, visit our website at <http://www.tractionsoftware.com> or email us at [info@tractionsoftware.com](mailto:info@tractionsoftware.com).

## The Right Column

There is a welcome message (configurable at the server level) indicating the time range for the digest. It is followed by an Active Projects and Active Discussions block.

The *Active Projects* list shows how many new articles or comments are posted to each of the projects you can Read in the date/time range of the digest. The links will take you to the corresponding project newspaper.

Active Projects
<a href="#">Engineering (16 articles)</a>
<a href="#">HR (6 articles)</a>
<a href="#">Intelligence (5 articles)</a>

The *Active Discussions* list shows the article titles that have new comments, and the count of those comments, in the time range of the digest.

Active Discussions
<a href="#">Does the 401K policy allow for roll-overs (1)</a>

## Digest Footer

The footer below the digest body contains links to your server's Front Page and to your preferences page (click *Edit subscription*), where you can change your digest settings. This brings you to the **Personal Preferences** page in the *Personal Setup (My Account)My Account* HTML forms.

[Front Page](#) | [Edit subscription](#)

## The Digest Body (Left Column)

The main part of the digest lists the title and first paragraph (brief content volume) of each article or comment that has been added to Traction since the last digest was sent.

It is organized with articles labeled Headline in a lead section called Headlines, and then lists all *other articles or comments* (those that are not marked headline) broken out in sections by project.

This format ensures that everyone pays attention to important items, but can focus easily on the projects which concern or interest them most.

In the default configuration, as many as three sections per project in the digest:

- *ProjectName* Articles
-

- *ProjectName To Do*
- *ProjectName Done*

In the case of the Articles section, the digest is reporting the articles or comments posted in the date range of the digest. In the case of the To Do and Done sections, it is reporting articles (and showing relevant paragraphs) that were marked with the To Do or the Done label in the date range.

**Example:** If you post an article today in the *Engineering* project with no label, it will show up in the *Engineering Articles* section tomorrow. If, consequently, you add a *Done* label to paragraph 3, then the article will appear in the newsletter again but this time with the title and 3rd paragraph in the *Engineering Done* section.

---

## ***Publishing to Traction***

Doc227: March 22, 2008 4:14 PM, Posted by Documentation Importer

There are three primary ways in which you might publish to Traction.

1. **Add New Article:** There is an Add New Article link in every Traction view. It will launch an HTML form.
2. **Email An Article to Traction:** Each project can be configured to read an email box.
3. **Traction Instant Publisher:** The Instant Publisher client (Version 1 or Version 2) application runs on Windows and can be used as an alternate to the HTML Add New Article form. *Note: If configured for it, Traction can launch the TIP V2 will launch in place of the Add New Article form.*

Remember, an article in Traction is like an email. It has an audience (Project), title, body, and attachments. You may also select a label when you publish the article, or any time in the future.

Other ways in which you publish to Traction include:

1. **Add a Comment:** Commenting is also publishing. Comments are articles that have a **comments on** relationship to another article. Commenting was discussed in the [Add a Comment to a Paragraph or Article](#) section.
2. **Email Reply from Traction:** When you are reading an email that was sent to Traction and click Email Reply link, your response will be sent to the sender of the email, but will also be published into the project you select.
3. **Email Articles from Traction:** When you email articles from Traction, you have the option to publish the body of your email in a project.
4. **RSS Feeds:** If you have the Traction TeamPage Feed Reader, an administrator can subscribe to feeds which will be published directly to Traction.

Your administrator may setup additional ways to publish to Traction. For example, an HTML form can be setup to post directly into Traction.

Traction supports XML-RPC and SOAP protocols. Many third party publishing tools using these protocols are able to publish to Traction.

## Add New Article

Doc5: March 22, 2008 3:44 PM, Posted by Documentation Importer, Edited by Paul Needham

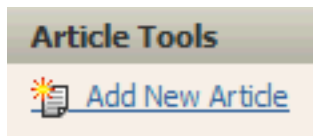
The most common way to publish to Traction is to invoke the *Article Editor* (see [Using the Article Editor](#) for a more detailed description of its capabilities). Other ways to publish include using [The Traction Instant Publisher V2 \(TIP V2\)](#) and to [Email an Article to Traction](#). This article describes the basic process of adding a new article using the *Article Editor*.

**Note:** Unless a user's preferences are configured to use TIP2, editing an article will also invoke the *Article Editor*.

## Accessing the Article Editor

The *Article Editor* can be accessed in one of three places:

1. The **Add New Article** link from the **Article Tools** Menu:



2. The **ADD** button on a **Section Title** (if the section is configured to include the button). Sections may appear on the Front Page, Project Newspaper, or transcluded in an Article.

### STATUS REPORTS



In this context, the New Article form will pre-load the appropriate labels to match the section. Specifically in this example shown it will include the *Status* label.

3. The **Add to this Topic** button in a **Topic View** which you arrive at by clicking a label or a section title.



In this context, the New Article form will pre-load the appropriate labels to match the topic view. Specifically in this example shown it will include the *To Do* label.

**Note:** When using either the *Add* button or *Add to This Topic* button, a section can be configured to automatically load an article template when invoking the *Article Editor*. A section can also be configured to load a custom form.

## Using the Add New Article Form

The *Article Editor* will pop up after you click a link to launch it. You can see there are selectors for the project, labels, attachments, relationships and sections. There are also various rich text editing controls:

The screenshot shows a web browser window titled "Create New Article - Mozilla Firefox". The address bar shows the URL: <http://demo.get-traction.com/traction/read?proj=HR&stickyparams=title&type=newentry&curer>. The page title is "Create New Article".

The form contains the following elements:

- Project:** A dropdown menu with "HR" selected.
- Style:** A dropdown menu with "Article" selected.
- Title:** A text input field.
- Allow Links to This Article by Name:** A checkbox that is currently unchecked.
- Add names:** A button.
- Labels:** A section with a link "Add labels".
- Add relationships:** A link.
- Add sections:** A link.
- Rich Text Editor:** A toolbar with various formatting options (Paragraph, Font family, Font size, Bold, Italic, Underline, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Image, Table, Horizontal line, Undo, Redo, Source code, etc.) and a large text area for writing the article body.
- Path:** A text input field with "p" entered.
- Simplify HTML:** A link.
- Footer:** A message: "To see who is allowed to read an article, click the Visibility link in the Article Tools after the the article has been posted." Below this are buttons for "Cancel", "Save Draft", "Post Article", and a "Publish" checkbox which is checked.
- Done:** A button at the bottom of the form.

**First, choose a project.** You can choose any project where you have *Author* permission.

This close-up shows the "Project:" dropdown menu. The menu is open, displaying a list of options: "-- select project --", "Engineering", "Executive", "HR", and "Intelligence". The "HR" option is currently selected and highlighted by the mouse cursor.

**Next, write a title and the body.** You can use the rich text controls to add formatting to your article. You can also add images and tables in the body, as well as insert a variety of widgets (see [Using the Article Editor](#)).



**Create New Article**

Project:  Labels:  Choose

Title:

Edit Attachments (0)  
Edit Relationships (0)  
Edit Sections (0)

B I U ABC [List Icons] Paragraph [Dropdown]

The vacation policy is very flexible and your vacation days do not include specific **company holidays.**

### Company Holidays

Holiday	Month
Memorial Day	May
Independence Day	July
Labour Day	September
Yom Kippur	Usually September
Christmas	December
New Years Day	January

### Vacation Allowance Schedule

- ♦ Manager: 2 Weeks
- ♦ Director: 3 Weeks
- ♦ VP or Higher: 4 Weeks

If you have any questions, please call us!

[Rich Text Editor Icons]

Simplify HTML

To share an article with members of another project, add a label from that other project. As long as members of that other project have Access permission to your project, they'll be able to read the article.

Style:  Cancel Save Draft Submit

Done

**Best Practice Tip:** Always write a good first paragraph, this will appear in the [Email Digest](#) and in other views such as the brief volume multi-entry view and, in some cases, the front page and project newspaper.

## Article vs. Page Style

The Style selector in the lower left allows you to select Article vs. Page style.



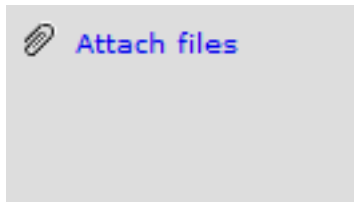
There are two differences between these choices:

1. The **Article style** displays the article details (Traction ID, Author, Date, Edit History, and Attachments links) at the top of the Article view, where **Page style** displays the article details at the bottom of the view.
2. The **Article style** will cause an in-line Article Comment form to appear at the bottom of the article, where the **Page style** will omit the comment form (however, you can still comment on the Page by using the Add Comment link in the Article Tools menu and the Context Menu)

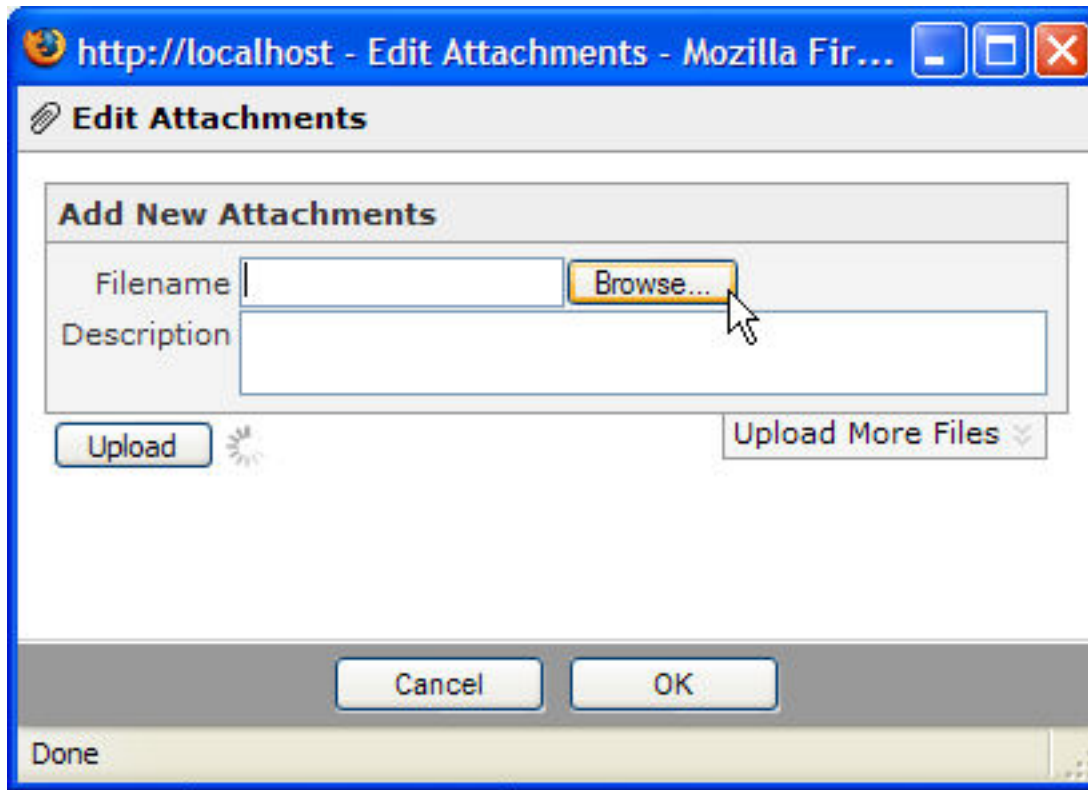
## Adding Attachments

You can attach files to an article in a similar manner to attaching files to an email message. The files will be associated with the article when it is posted and will appear in a list at the bottom of the article. Attached files can be linked to and, for appropriate file formats, displayed as images or using inserted widgets.

Click the link to *Attach files*.



A window will appear. If you want to upload several attachments at once, click the Upload More Files button.



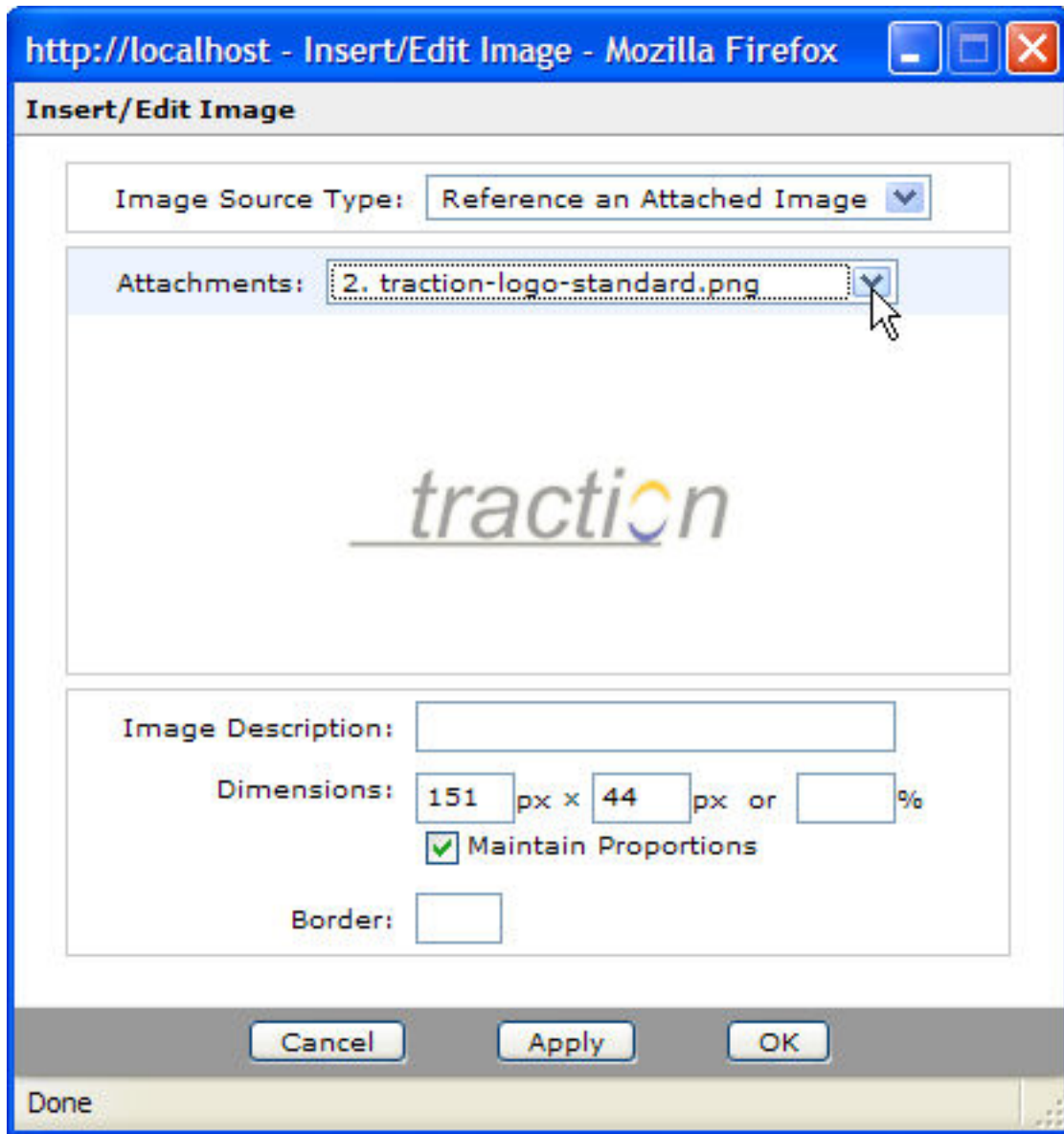
See [Adding and Editing Attachments](#) for a more detailed description of working with attachments.

### Displaying an attached image in the article body

There are several ways to display an image into the body of an article. See [Displaying Images](#) for a complete discussion for this subject. The most common method is to use the *Insert/Edit Image* tool on the *Article Editor* toolbar:



This will pop up the *Insert/Edit Image* dialog window. In the below example, the desired image file has already been uploaded as an attachment, so the *Reference an Attached Image* option is being selected.



After you click OK, the article in its edit window will look like this:

http://localhost - Create New Article - Mozilla Firefox

Create New Article Vacation Policy Load Draft ?

Project: HR Labels: Choose

Edit Attachments (2)  
Edit Relationships (0)  
Edit Sections (0)

Title: Vacation Policy

**B I U ABC** Paragraph HTML ?

traction The vacation policy is very flexible and your vacation days do not include specific **company holidays.**

**Company Holidays**

Holiday	Month
Memorial Day	May
Independence Day	July
Labour Day	September
Yom Kippur	Usually September
Christmas	December
New Years Day	January

**Vacation Allowance Schedule**

- ♦ Manager: 2 Weeks
- ♦ Director: 3 Weeks
- ♦ VP or Higher: 4 Weeks

If you have any questions, please call us!

▲ Simplify HTML

If you have permission to create labels in a project, you can create a new label by typing +: before the name of the label you wish to create.

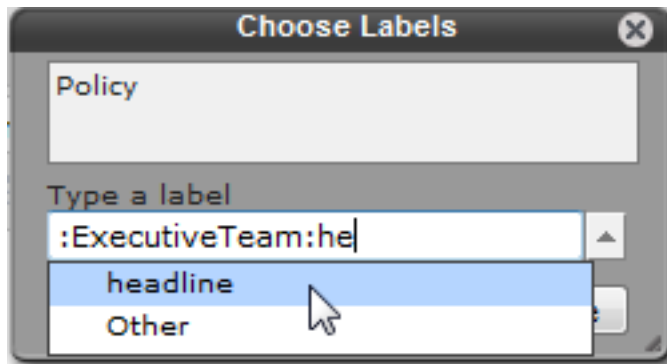
Style Article Cancel Delete Draft Save Draft Submit

Done

## Insert Labels

*Labels* are not required, but are often used to make your article show up in a section (e.g. *Headline* or *News* label) or associate it with a *label* category (e.g. *competitor*, *product*) in order to make it easier to find again/group it together with other articles that have to do with that label category. You can select multiple *labels* from multiple *projects*.

To choose labels for the new article, click the *Add Labels* link to the right of **Labels** box in the *Article Editor* window. The *Choose Labels* tool will pop up:

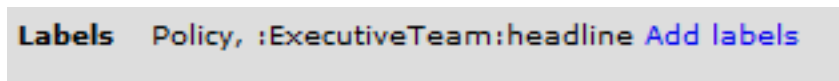


The Choose Labels tool allows you to select labels from any project to which you have *Author* permissions. In this case, we have selected the *Policy* label from the *HR* project and the *Headline* label from the *ExecutiveTeam* project.

To remove a label from the selection window, put your cursor over the label. A strikethrough will appear and clicking it will remove it from the list.

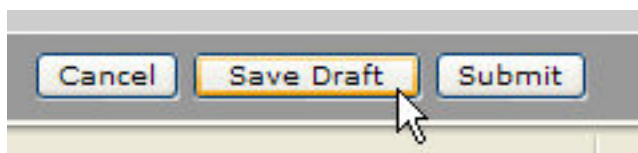
**Note:** Choosing a label from another project will make the article visible to people with permission to read that project.

When you have selected all the labels you want to, click *Done*. The labels chosen will appear in the *Labels* area in the *Article Editor*.



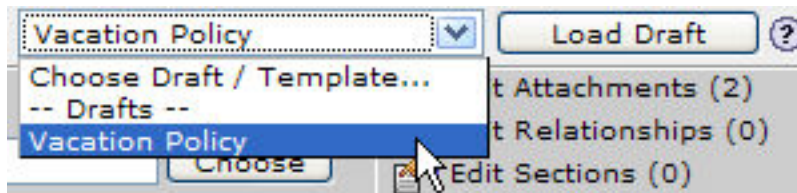
## Saving Drafts

While you are working, you can save drafts of your work on the server by clicking the **Save Draft** button. In Traction 3.7.3 and later, drafts are also saved automatically while you are editing.



The list of saved drafts appears in a drafts pull-down at the top of the screen.





To revert to a saved draft, Choose a draft from this pull-down and click the *Load Draft* button at the bottom of the form. If the administrator has selected a user's Collection to serve as a Template, a Templates section would also appear in this list. You can choose a template, load it and start editing.

## Posting your Article

The last and most important part of the process is to post your article. Click the *Post Article* button. In the resulting article below you can see the labels in the upper right, the image and body text, a comment form, and the two attachments.

*Note: Immediately after you post it, the article will appear under Recent Articles section of the selected project's newpage, Recent Articles section of the Front Page, and in that project's section of the next email digest.*

**Internet Explorer Users:** An Edit Button may appear (if your administrator has enabled it) next to Microsoft Office format document attachments. This allows you to click to edit the attachment and edit it in the corresponding MS Office application over the web (see [Editing Microsoft Office Files in Windows](#)). All other users can click the



icon to access the attachment details in order to edit the attachments. More information about attachments is detailed in [Inspecting and Managing Files via the File Details View](#).

## Vacation Policy

HR 12 | August 30, 2006 | 9:48:38 PM EDT  
 Posted by admin  
 2 Attachments

policy  
 :Executive:headline



The vacation policy is very flexible and your vacation days do not include specific **company holidays**.

### Company Holidays

Holiday	Month
Memorial Day	May
Independence Day	July
Labour Day	September
Yom Kippur	Usually September
Christmas	December
New Years Day	January

### Vacation Allowance Schedule

- Manager: 2 Weeks
- Director: 3 Weeks
- VP or Higher: 4 Weeks

If you have any questions, please call us!

### Article Comments

Add a Comment on this Article

**B** *I* U ABC |
 [List Icon] [List Icon] [List Icon] [List Icon] |
 [Link Icon] [Image Icon] |
 Paragraph [v] [Smiley Icon] [Ab Icon] HTML [Globe Icon]

Post Comment in the project HR [v]

### Attachments

- 
 1. Vacation Policy Presentation.ppt (12.5 KB)  [Edit](#)  
*Vacation Plan Presentation - Given at 2006 Company Meeting*
- 
 2. traction-logo-standard.png (6.2 KB)   
*Traction Logo*

---

## ***Making Links to Traction Articles***

Doc166: March 22, 2008 4:07 PM, Posted by Documentation Importer, Edited by Jordan Frank

It is easy to make a link from one article (or comment) to another article, comment, a list of articles or even a view in Traction. This article focuses on how to make a link to an article or comment.

*A link will actually create a bi-directional link, so you can see the incoming link in the Referenced By section of the Article to which you linked.*

All that is required is to type the Traction ID or the Wiki Page Name of the target article. The Traction ID of an article is composed of the project name and a number (e.g. HR5).

For additional reference on making links, read [Making Links with the Link Tool](#) and [Embedding Sections in Articles](#).

There are 5 easy methods to create direct links to Articles or Comments in Traction.

### **Method 1: Make a Link with the Link Tool**

Traction provides a comprehensive Link Tool in the Article Editor for creating both external and internal links. You can easily create a link to an existing Traction Article, Attachment, Existing or New Wiki Page Name, Share Folder, or View by following the directions in [Making Links with the Link Tool](#).

http://fastdemo.get-traction.com/?type=insertlink&tokenedit\_action=new...

### Insert/Edit Link

Text to display

Open link in ☒ same window ☐ new window

• Link to an External URL

→ Link to an Article, Paragraph or Attachment

Traction ID

☒ Show title of linked content

☒ Include Traction ID in link

You are linking to:

Look up by ☒ Title ☐ Content ☐ Attachment Name

- (1) HR72: Employee **Pension** Program  
*The **pension** program is being maintained for ...*
- (2) HR87: re: **Pension** Plan unfair to 40+ Yr Old Employees  
*After further review, it turns out that most ...*
- (3) HR3: re: **Pension** Plan unfair to 40+ Yr Old Employees  
*Its true, they have spreadsheets. Here is one ...*
- (4) HR4: re: **Pension** Plan unfair to 40+ Yr Old Employees  
*Legal says there is not a discrimination ...*
- (5) HR1: **Pension** Plan unfair to 40+ Yr Old Employees  
*One of the employees has noticed that the ...*

• Link to a Named Page

• Link to a Shared File or Folder

• Link to a View

## Method 2: Write the Traction ID in the Article or Comment Text

From the *Create New Article*, *Edit Article*, or *Comment* forms, simply type the Traction ID (project name and article number) of the article to which you want to link (all one word, not separated by blanks, e.g. HR5).

You can see the Traction ID at the top of any single or multi-entry view of an *article* in Traction, just below the title, or you will find it in the *bread crumb* at the top of the single entry Traction view.

Front Page > **HR > 5**

<b>Projects</b> Engineering (71) Executive (4) <b>HR (13)</b> Intelligence (5) <hr/> <b>HR</b> <b>Labels</b> bulletin done (1) FAQ (1)	<b>HR » Recent Articles   Recent Comments   All Recent</b> Show <input type="text" value="Full content"/> with co <h2>Recruiting and Hiring Policy</h2> <p>HR5   June 5, 2006   11:35:25 AM EDT  Posted by admin</p> <p>All new hires and promotions must go through the same hiring process:</p> <ol style="list-style-type: none"> <li>1. Call for internally sourced promotions or job changes</li> </ol>
---	--

This also works when you are sending email to a Traction project. Just write the Traction ID in the text of the email message, and it will automatically become a hyperlink when the message is published.

If you want to link directly to a paragraph (or "Item"), then you fully qualify the Traction ID to include the paragraph/item number. In the case above, typing "HR5.04" could link to the 4th paragraph of the article. To determine the item number of a paragraph, you can hover over the item block and you will see the Item ID at the lower right corner of the grey outline.

### Method 3: Write the Wiki Page Name in Wiki Markup

[Making Links with the Link Tool](#) explains how to use a GUI to make 5 different types of links, including a Named Page. [Linking to Named Pages](#) goes into more specifics on how to use wiki markup to link to an existing Named Page or to a new page that doesn't yet exist.

### Method 4: (For Internet Explorer Users Only) Drag the Article Title or Traction ID

**Note:** This method works when Internet Explorer is your browser, and you are not using the Traction Instant Publisher. Mozilla/Firefox/Safari/Netscape support will be added when these browsers add the UI support necessary to implement this feature.

You can drag and drop the title of any article or any link to a single-article view into any compose form or collector window. When you drop, the Traction ID will be inserted at the insertion point.


In the screenshot below, all the highlighted text can be dragged and dropped into the new article or comment forms to create links to the corresponding articles.

## Sample Engineering Questions

Engineering6 | September 27, 2005 | 2:53:40 PM EDT

Posted and Edited by admin | View edit history



⚙ Cross References | 💬 3 Comments

to do ☐  
question 

This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newspaper.

### 1. How do I comment on a paragraph?


You can hover over a paragraph and right click to see the Traction Context Menu where you can choose Comment from the Paragraph section of the menu. Or, left click the "M" Menu marker at the end of any paragraph to expose the context menu.


admin / [Engineering7](#) / September 27, 2005 / 2:55:34 PM EDT  


### 2. How do you find Traction Help?

You can [click here](#) for the help guide which includes help for users and administrators.



Most users dont need help, but you can learn a lot from it!

admin / [Engineering68](#) / August 30, 2006 / 12:37:31 PM EDT 

admin / [Engineering8](#) / September 27, 2005 / 2:57:50 PM EDT 

Also, the help link is always at the bottom of the screen and, occasionally you will see a 

link which you can click for context sensitive help.

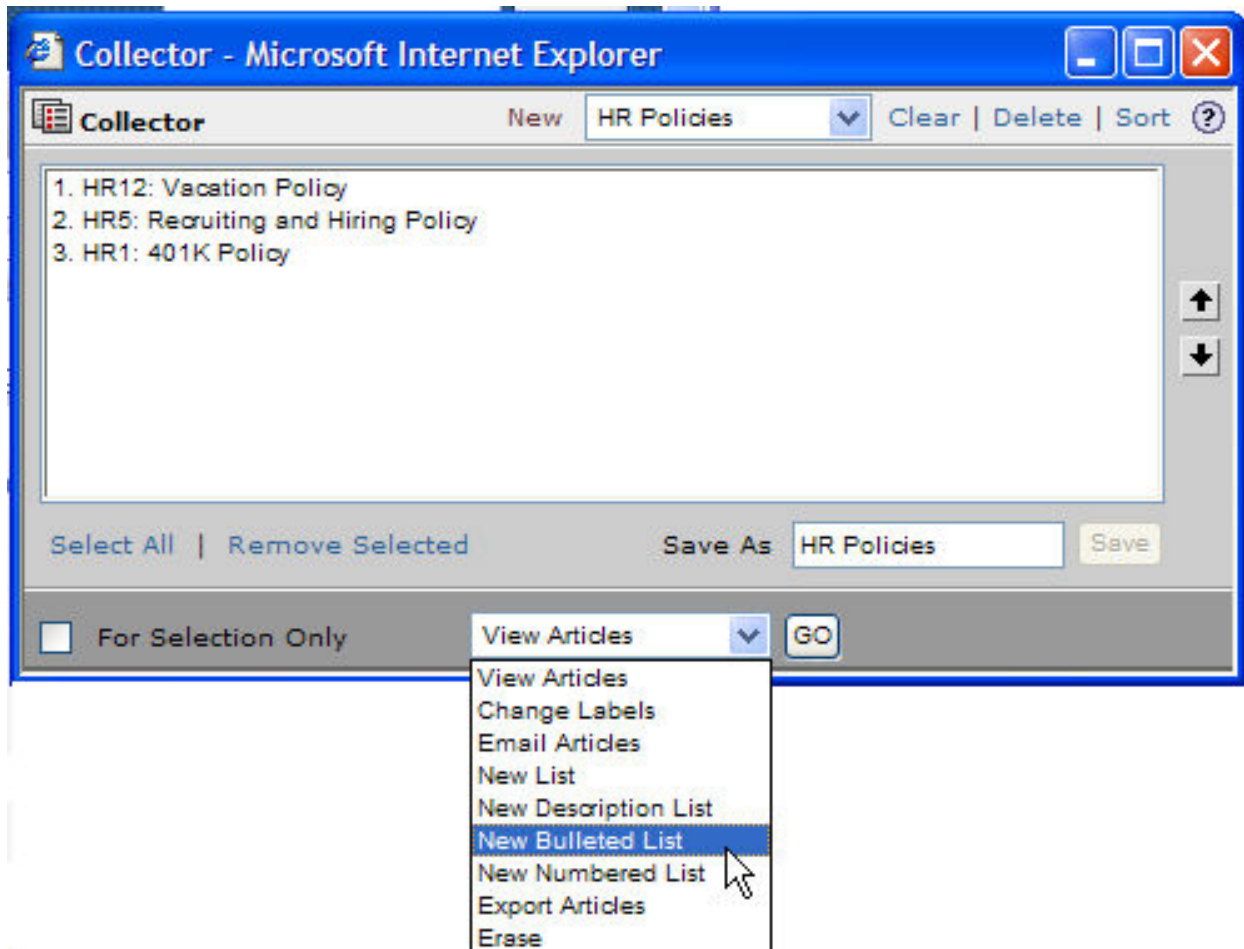
admin / [Engineering9](#) / September 27, 2005 / 2:58:12 PM EDT  

### 3. How can I add new labels?

#### Method 5: Choose New List from the Collector

If you have added article references into the *Collector* (See the [The Collector](#) section), you can choose one of the New List options and press GO.





A Compose New Article form will appear with the Traction ID's listed in the article body.

**Create New Article - Microsoft Internet Explorer**

**Create New Article**

Project:

Labels:

Edit Attachments (0)  
 Edit Relationships (0)  
 Edit Sections (0)

Title:

**B I U ABC** | | | | | | Paragraph  | | | HTML |

Following are our current HR Policies.

- HR12
- HR5
- HR1

▲ Simplify HTML

To see who is allowed to read an article, click the Visibility link in the Article Tools after the the article has been posted.

Style


### ***The Links are Resolved when you click Submit***

Regardless of the method you chose, the result will be an article or comment with the hyperlink resolved. Each link will include the Traction ID and the title of the article or comment to which you linked. If the target article or comment title is changed in an edit, the link will always display the most current title.

## HR Policy Overview

HR13 | August 30, 2006 | 10:17:25 PM EDT

Posted by admin

 Cross References




































Following are our current HR Policies.

- [HR12: Vacation Policy](#)
- [HR5: Recruiting and Hiring Policy](#)
- [HR1: 401K Policy](#)

---

### Article Comments

Add a Comment on this Article



**B** **I** **U** **ABC** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

## 401K Policy

policy

HR1 | June 5, 2006 | 11:28:00 AM EDT




















Posted by admin

 Cross References |  2 Attachments

This article may include a briefing on the 401K Policy and a link to a presentation attached @1 and a Word version attached @2. Note, you can edit and optionally version the attachments.

### Article Comments

Add a Comment on this Article

**B** *I* U                      

Check with your Traction administrator for the list of project available email addresses.

Your email can include a subject, body, and attachments.

Traction will show the email header information at the end of your article. That will include the From, To, and Date fields.

Three important tips:

1. Be sure to write a good first paragraph! The first paragraph shows up in the email digest and in *brief* content views.
2. Be sure your *From* address is listed in the *Personal Information* section of your *My Account* setup. This is how Traction will know its from you and, accordingly, attribute the mail to you. Otherwise, the message may be rejected or will show as posted by *Visitor*, if *Visitor* is allowed to *Author by Email* in the project.
3. If [Overview of the Project ACL Editor](#) allow *Visitors* to *Author via Email*, then anyone can email the project. Articles from unknown email addresses will be posted as user named *Visitor*. If not, the project will reject mail from email addresses that it does not recognize as associated with a user who has rights to *Author via Email*.

Below is a picture of how an email might appear in Traction.

## Weblog Market Size?

InBox3 | December 10, 2002 | 6:50:41 PM EST

Posted by Visitor | Edited by Greg Lloyd | [View edit history](#)

[Cross References](#)

Hi - We are working on a second stage market plan for the Alpha product and need to know what information you have on the size of the Weblog market. Any pointers you can give us on the business and consumer side would be interesting. Thanks!

Mark Ting

From: Mark Ting <[mark.ting@tractionsoftware.com](mailto:mark.ting@tractionsoftware.com)>

To: [tractioninbox@cox.net](mailto:tractioninbox@cox.net)

Date: Tue, 10 Dec 2002 18:49:19 -0500

### Article Comments

Add a Comment on this Article

**B** *I* U ABC |
 [List Icon] [List Icon] |
 [Align Left Icon] [Align Center Icon] [Align Right Icon] |
 [Link Icon] [Unlink Icon] [Image Icon] |
 Paragraph [v]
 [Smiley Icon] [Ab Icon] HTML [Help Icon]

Post Comment
in the project
InBox [v]

Note: In this example, you can see the email came from *Mark Ting*. It was sent to an email address, [tractioninbox@cox.net](mailto:tractioninbox@cox.net), which is a mailbox that is read by the *InBox* project in this example. If Mark Ting were a user known to Traction (by email address associated with his account), this entry might say *Posted by Mark* but, in this case, Mark is not known to Traction, so his *article* is shown as *Posted by Visitor*.

## Email Reply from Traction

Doc84: March 22, 2008 3:56 PM, Posted by Documentation Importer

If an article was emailed to Traction, you can click *Email Reply* from the *Context Menu* or the *Article Tools* Menu to send an email back to the person who sent the original message.



**Weblog Market Size?**  
 InBox3 | December 10, 2002 | 6:50:41 PM  
 Posted by Visitor | Edited by Greg Lloyd | V  
 Cross References

Hi - We are working on a second st  
 information you have on the size of  
 business and consumer side would

Mark Ting

From: Mark Ting <mark.ting@tractionsoft  
 To: tractioninbox@cox.net  
 Date: Tue, 10 Dec 2002 18:49:19 -0500

**Article Comments**

Add a Comment on this Article

**B I U ABC** | **Paragraph** | **ab** | **HTML**

**Post Comment** in the project **InBox**

**Article Tools**

- Add New Article
- Add Comment
- Edit Article
- Change Labels
- Email Reply**
- Send Trackback
- Create Share Folder
- Visibility

**Export**

- Print Version
- Email Articles
- Export Articles

**Page Tools**

- Collect Articles
- Erase Articles

**Account**

- Server Setup
- Project Setup
- My Account (jfrank)

The Email Reply form will pop up.

The project choice will default to the current project, or you can select a different project. In this example, the *MarketResearch* project is chosen instead of the *Inbox* project.

If you include [Making Links to Traction Articles](#) in your message (e.g. iThe answer to your question is in MarketResearch9i), then select the *Include Links into Traction* option at the bottom of the form.

The text of your reply will be logged to the project of your choice, and a relationship *Replies To* and *Is Replied to By* will be created between the inbound and outbound messages, see below examples.


Just like the Add New Article form, this form includes an option to *Edit Attachments*. Attachments will be sent and included in the published article.

When you are ready to send the message, click *Send*. Wait a few moments for Traction to process the request, then you will see your message posted to Traction. The *From* and *To* information will be included below the text of your message.

## re: Weblog Market Size?

MarketResearch360 | November 25, 2003 | 12:38:49 AM EST

Posted by Jordan Frank

 Cross References

Hi Mark - Check out [MarketResearch9: CM, Portals and Collaboration Fading: Enter 'Smart' Suite](#), it has some notes about the size of the knowledge management market as a whole.

Jordan

Reply-To: [jfrank@tractionsoftware.com](mailto:jfrank@tractionsoftware.com)

From: [jfrank@tractionsoftware.com](mailto:jfrank@tractionsoftware.com)

To: [mark.ting@tractionsoftware.com](mailto:mark.ting@tractionsoftware.com)

### Article Comments

Add a Comment on this Article

**B** *I* U ABC |
 [List Icon] [List Icon] |
 [Align Left Icon] [Align Center Icon] [Align Right Icon] |
 [Link Icon] [Image Icon] |
 Paragraph [v] [Smiley Icon] [Abbr Icon] HTML [Help Icon]

Post Comment in the project MarketResearch [v]

### Related Articles

#### references (1)

[MarketResearch9: CM, Portals and Collaboration Fading: Enter 'Smart' Suite](#)

#### replies to (1)

[InBox3: Weblog Market Size?](#)



Note the *Replies To* relationship that was created, giving you direct access to the article you replied from.

The message you replied to will have the converse, *Is Replied to By* relationship, see below.

## Weblog Market Size?

InBox3 | December 10, 2002 | 6:50:41 PM EST

Posted by Visitor | Edited by Greg Lloyd | [View edit history](#)

[Cross References](#)

Hi - We are working on a second stage market plan for the Alpha product and need to know what information you have on the size of the Weblog market. Any pointers you can give us on the business and consumer side would be interesting. Thanks!

Mark Ting











From: Mark Ting <[mark.ting@tractionsoftware.com](mailto:mark.ting@tractionsoftware.com)>



To: [tractioninbox@cox.net](mailto:tractioninbox@cox.net)

Date: Tue, 10 Dec 2002 18:49:19 -0500

### Article Comments

Add a Comment on this Article

**B** *I* U ABC
 






Paragraph
 

HTML
 

Post Comment
in the project
InBox



### Related Articles

is replied to by (1)

[MarketResearch360: re: Weblog Market Size?](#)



## Email Articles From Traction

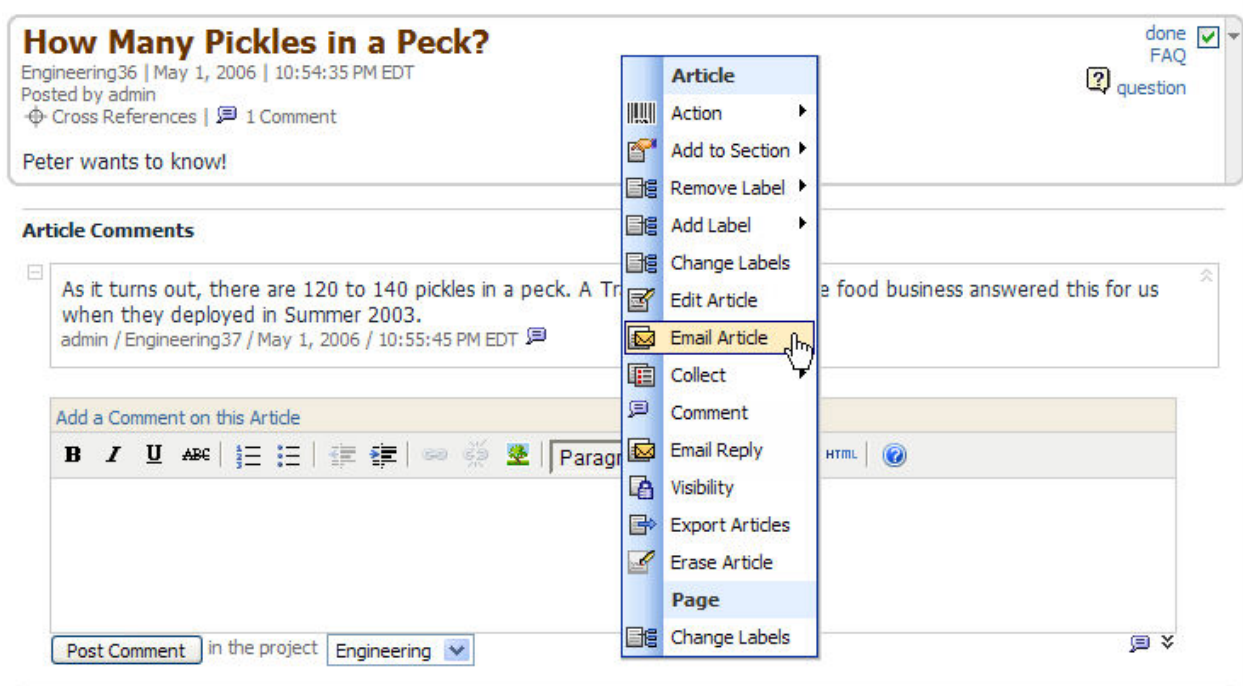
Doc79: March 22, 2008 3:56 PM, Posted by Documentation Importer

You can send one or more articles to someone from Traction. When you send the articles, Traction will post a new article referencing the articles you sent, and optionally publish the contents of what you said.

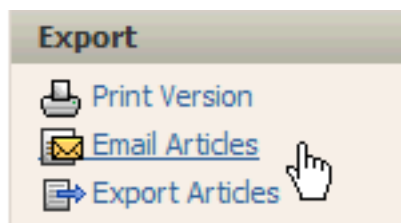
### Clicking to Email Articles

There are three ways to email articles from Traction.

**1. Article Context Menu:** Select Email Articles from the Context Menu when you hover over a single article:

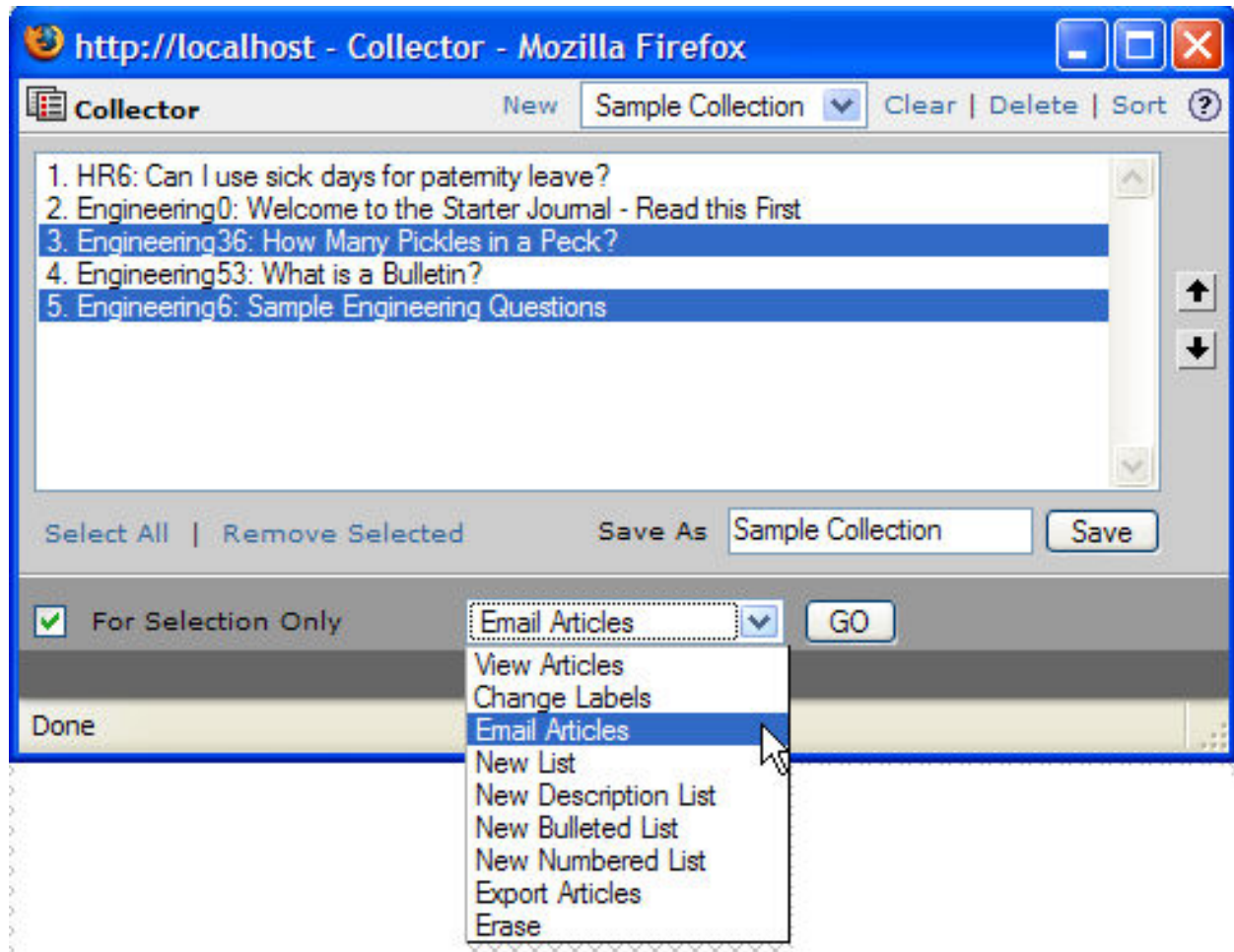


**2. Export Menu:** To email articles from a single or multi-entry view, click the Email Articles link from the Export menu:



**3. Collector:** To email articles from the Collector, select a collection and the articles you want to send from the collection, then choose the *Email Articles* option.





### Filling out the Email Articles Form

The Email Articles form will appear with your selected articles in the body of the email.

The default options are set to *Include links into Traction* and to *Log Message Content*. In the example below, *Include Comments* and *Include Labels* options are also checked on.



**Email Articles from Traction - Compose**

<b>To:</b> joe@company.com <b>Cc:</b> _____ <b>Bcc:</b> _____ <b>From:</b> jordan@company.com <small>Separate multiple email addresses with commas, semicolons, or spaces.</small>	Send as: Both <input checked="" type="checkbox"/> Include links into Traction <input checked="" type="checkbox"/> Include comments <input checked="" type="checkbox"/> Include labels Include headers: none This article will be logged to: Engineering <input checked="" type="checkbox"/> Log message content.
--	---

**Subject:** Some Engineering Questions

**Body:**

**B I U ABC** [List Bulleted] [List Numbered] [Text Left] [Text Right] [Text Center] [Text Justify] [Link] [Image] [Table] [Paragraph] [Quote] [Code] [HTML]

Dear Joe - See the engineering questions below. Most are answered with in-line comments.  
- Jordan

---

**Article(s)**

### How Many Pickles in a Peck?

*Engineering36: May 1, 2006 10:54:35 PM EDT, by admin*  
Peter wants to know!

As it turns out, there are 120 to 140 pickles in a peck. A Traction customer in the food business answered this for us when they deployed in Summer 2003.  
[\[admin, Engineering37, May 1, 2006, 10:55:45 PM EDT\]](#)

[question](#)  
[done](#)  
[FAQ](#)

---

### Sample Engineering Questions

*Engineering6: September 27, 2005 2:53:40 PM EDT, by admin*  
This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newspaper.

- How do I comment on a paragraph?
 

You can hover over a paragraph and right click to see the Traction Context Menu where you can choose Comment from the Paragraph section of the menu. Or, left click the "M" Show Paragraph Actions marker at the end of any paragraph to expose the context menu.  
[\[admin, Engineering7, September 27, 2005, 2:55:34 PM EDT\]](#)
- How do you find Traction Help?
 

You can [click here](#) for the help guide which includes help for users and administrators.  

Most users dont need help, but you can learn a lot from it!  
[\[admin, Engineering68, August 30, 2006, 12:37:31 PM EDT\]](#)

[\[admin, Engineering8, September 27, 2005, 2:57:50 PM EDT\]](#)  
 Also, the help link is always at the bottom of the screen and, occasionally you will see a link which you can click for context sensitive help.  
[\[admin, Engineering9, September 27, 2005, 2:58:12 PM EDT\]](#)
- How can I add new labels?

[Click here to view these articles in Traction.](#)

[Edit >>](#)

If you would prefer to use your own email program, [click here for help](#).

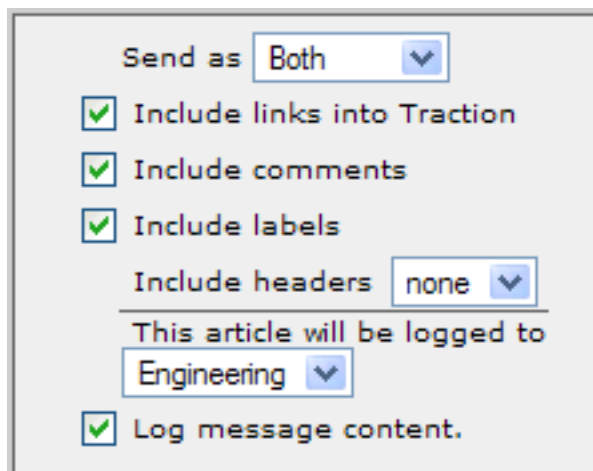
**Attachments** [Edit Attachments](#) (0 Attachments)

Your preferred email address will appear in the *From* field.

You can fill out the *To*, *CC*, and *BCC* fields. You will see email completion on these fields against other Traction, LDAP, and Active Directory users' email addresses (if you have lookup permissions). You can use the mouse, arrow keys, enter, or tab to accept the currently selected option.



When sending the email, you have several options:



1. **Include links into Traction:** By default, Traction includes hyperlinks back to your Traction server in the mail message, so the recipient can follow them. If your recipient doesn't have access to the server, you may prefer to turn these off.

With links enabled, the title, Traction ID, and cross-references in the body are hyperlinks.

**How Many Pickles in a Peck?**

*Engineering36: May 1, 2006 10:54:35 PM EDT, by admin*

With links disabled, these are flattened to plain text.

## How Many Pickles in a Peck?

*May 1, 2006 10:54:35 PM EDT, by admin*

2.

**Include comments:** You can control exactly which comments are included in outgoing mail messages.

When you select include comments.

☒ Include comments

The inline comments are added to the message.

### 2. How do you find Traction Help?

You can [click here](#) for the help guide which includes help for users and administrators.

Most users dont need help, but you can learn a lot from it!

*[admin, Engineering68, August 30, 2006, 12:37:31 PM EDT]*

*[admin, Engineering8, September 27, 2005, 2:57:50 PM EDT]*

Also, the help link is always at the bottom of the screen and, occasionally you will see a link which you can click for context sensitive help.

*[admin, Engineering9, September 27, 2005, 2:58:12 PM EDT]*

### 3. How can I add new labels?

When you hover the mouse over any comment, an X appears in the top-right of that comment's box:

## 2. How do you find Traction Help?

You can [click here](#) for the help guide which includes help for users and administrators.

Most users dont need help, but you can learn a lot from it!

✕

Also, the help link is always at the bottom of the screen and, occasionally you will see a [?](#) link which you can click for context sensitive help.

## 3. How can I add new labels?

Clicking this X removes the comment. The page will reload.

## 2. How do you find Traction Help?

You can [click here](#) for the help guide which includes help for users and administrators.

Also, the help link is always at the bottom of the screen and, occasionally you will see a [?](#) link which you can click for context sensitive help.

## 3. How can I add new labels?

If you decide that you want to undo a removal, you can use your browser's back button.

If you wish to restore all the comments to the original state, unclick and reclick the "Include Comments" checkbox.

3.

Include Labels: Lets you control whether or not the current Traction labels appear in the content you are sending.

Without *Include Labels*:

☐ Include labels

### Sample Engineering Questions

*September 27, 2005 2:53:40 PM EDT, by admin*

This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newspage.

The same paragraph, with *Include Labels* checked:

## Sample Engineering Questions

September 27, 2005 2:53:40 PM EDT, by admin

This article includes 3 sample questions about Traction and some answers are provided. The Starter Journal includes comments answering #1 and #2. When you comment in line with the answer to #3, you can mark this set of questions *Done* to remove them from the *Questions To Do* section of the newspaper.

question  
to do

4. Include Headers: If the original message was an email received by Traction, this controls which of the original email headers are forwarded.

The options are: *none*, to turn off headers; *brief*, to show only popular headers; *full*, to show all headers; and *as is* to use the entry's current settings.

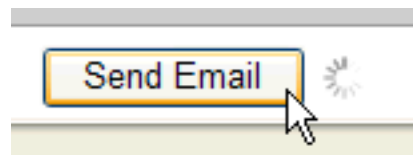
5. **This entry will be logged to:** Traction logs an article for every email sent, recording the mail headers of the outgoing message. This article is created with an "emails" relationship to the articles that are included. This menu lets you control to which project that article is logged.
6. **Log message content:** Check this if you want to log the *content* of the cover letter to the project designated above. If so, the cover letter will appear as a normal Traction article. If not, only the headers and the relationship are recorded.

There are also options at the bottom of the form to edit the content of the articles that are enclosed and to edit the attachment list.

The articles you send will have a relationship called *emailed by* with the cover letter article (which will naturally have the converse *emails* relationship with each of the articles included).

## Sending the Email

When you are done filling in the form, click the *Send Email* button at the bottom of the page:



Traction will update the view once the article has been sent. If you selected *Log message content*, you should be taken to the resulting article. If not, you will return automatically to the Front Page. If there is a problem sending the message, the page will reload with an error message.

<b>To</b>	<input type="text" value="oopsforgot"/>
<b>Cc</b>	<input type="text"/>
<b>Bcc</b>	<input type="text"/>
<b>From</b>	<input type="text" value="cjn@tractionsoftware.com"/>

*Invalid Addresses; nested exception is: class com.sun.mail.smtp.SMTPAddressFailedException: 550 oopsforgot@va.gwu.edu unknown user account*

*Separate multiple email addresses with commas, semicolons, or spaces.*


If you checked the *Log message content* checkbox, your email will then appear as a Traction article which is cross-linked to the articles and comments that it enclosed.



## Some Engineering Questions

Engineering71 | August 30, 2006 | 11:12:32 PM EDT

Posted by admin

 Cross References

Dear Joe - See the engineering questions below. Most are answered with in-line comments.

- Jordan

*From: jfrank@tractionsoftware.com*








*To: jfrank@tractionsoftware.com*





*Subject: Some Engineering Questions*

---

### Article Comments


Add a Comment on this Article



**B** **I** **U** **ABC**       

Paragraph    HTML 

Post Comment

 in the project 

Engineering 

---

### Related Articles

#### emails (6)

Engineering37: re: How Many Pickles in a Peck?

Engineering36: How Many Pickles in a Peck?

Engineering9: re: Sample Engineering Questions

Engineering8: re: Sample Engineering Questions

Engineering7: re: Sample Engineering Questions

Engineering6: Sample Engineering Questions

Note that the original articles show that they were *emailed by* the new article.

## How Many Pickles in a Peck?

Engineering36 | May 1, 2006 | 10:54:35 PM EDT

Posted by admin

[Cross References](#) | [1 Comment](#)

done ☒  
FAQ  
question

Peter wants to know!

### Article Comments

As it turns out, there are 120 to 140 pickles in a peck. A Traction customer in the food business answered this for us when they deployed in Summer 2003.  
admin / Engineering37 / May 1, 2006 / 10:55:45 PM EDT

Add a Comment on this Article

**B** *I* U ABC |        Paragraph   ab  

Post Comment

in the project

Engineering



### Related Articles

emailed by (1)

[Engineering71: Some Engineering Questions](#)



referenced by (2)

Executive2: Sample Executive Meeting

Engineering39: Testing Unit Delivery Delayed

## Reclassify (Change Labels) Articles or Paragraphs

Doc234: March 22, 2008 4:15 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

### Changing Labels

At any point after posting an article or comment, you can change the labels on an paragraph, article, or a batch of articles.

Anyone who has *Change Labels* permission in a given project can add or remove labels from that project to any article they can read.

You may wish to change labels for a number of reasons:

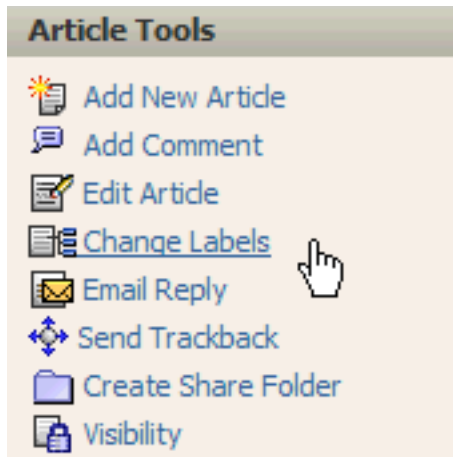
- To indicate a status change, e.g. from *to do* to *done*
- To add finer-grain detail to a taxonomy, e.g. breaking down *contacts* into *friends* and *leads*.
- To recover from an over-ambitious attempt at fine-grain taxonomy, e.g. merging *Connecticut*, *Massachusetts*, *Rhode Island*, *Maine*, *Vermont*, and *New Hampshire* into one label, *Northeast*.

Traction makes changing labels a safe and lightweight operation, and it provides specialized reporting on label changes. For example, a standard Traction idiom -- showing the list of articles to which the done label was added on the newspaper -- can fulfill the need for status reports and prevent having to write them

## Changing Article-Level Labels

You can specify labels for any number of paragraphs in an article. We refer to labels that appear on the title of the article as article-level labels; they thematically apply to the entire article, as opposed to a designated paragraph.

All single article views provide a *Change Labels* link in the Article Tools menu:



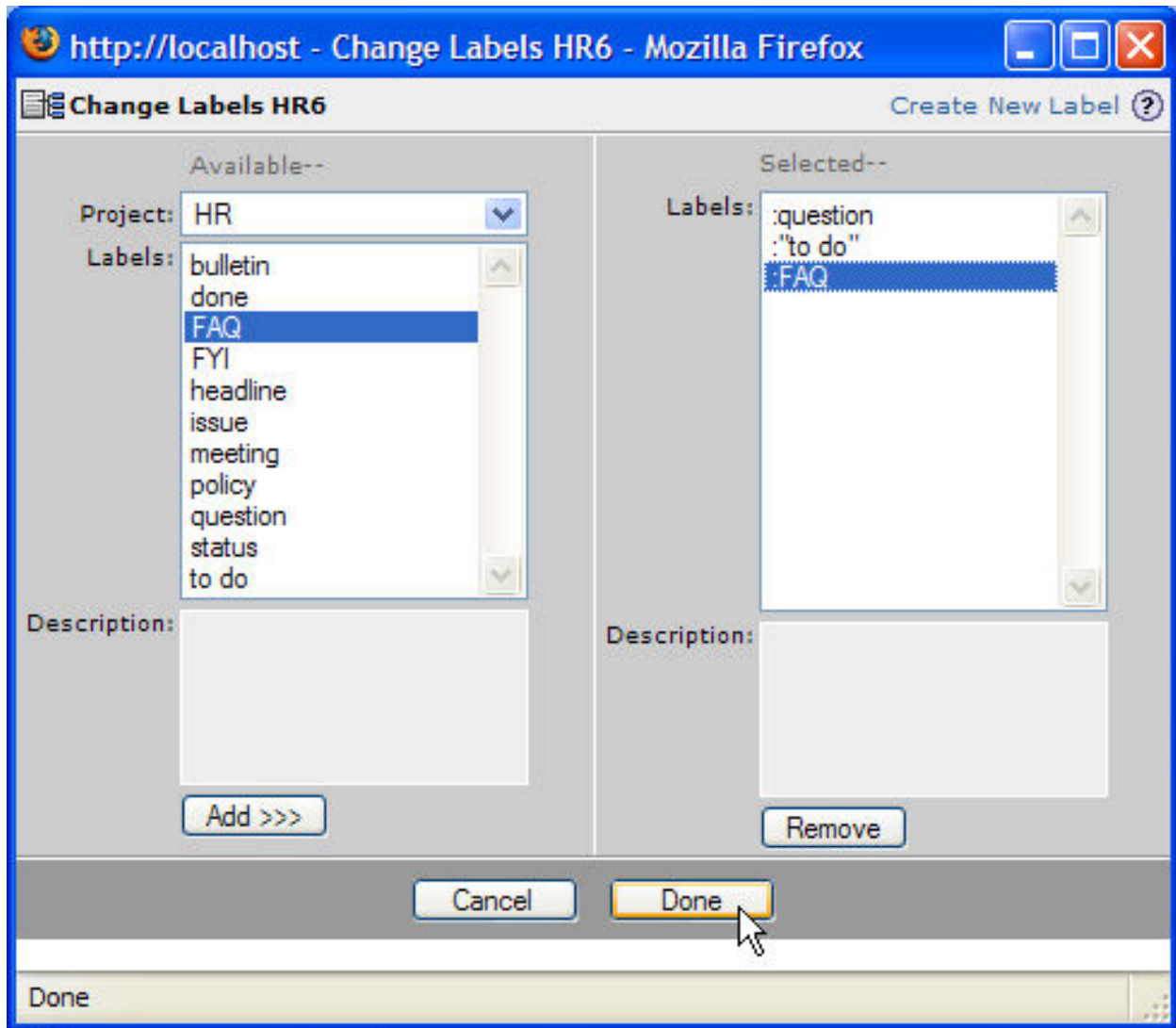
Or you can select the *Change Labels* option in the *Article* section of the *Context Menu*:



Note: The Context Menu has additional shortcut options for changing labels including

- **Action** (explained down below)
- **Add to Section** (which lets you select a label driven page section and apply the necessary labels which apply to the selected section)
- **Remove Label** (which lets you quickly remove one or more labels that are already on the article), and
- **Add Label** (which lets you navigate to a Project and a Label to add one label).

The Change Labels dialogue appears. If you have permission to *Define Labels* in the project, you will see a *Create New Label* link in the upper right of the dialogue. In this example, the FAQ label has been added:



After you click done, the article is updated, now including the FAQ label:

## Can I use sick days for paternity leave?

HR6 | June 5, 2006 | 11:36:58 AM EDT  
Posted by admin












to do ☐  
FAQ  
question



I will go on paternity soon and wonder if I can be paid for the time I will be out of the office. Is it possible to use my sick days during this period of time?

Are there any other options I should be aware of?

### Article Comments

Add a Comment on this Article

**B** *I* U ABC |   |   |    | Paragraph    HTML 

Post Comment in the project HR  

### Changing Paragraph Level Labels

To change labels on a paragraph, select *Change Labels* (or as relevant use the Action, Add to Section, Add Label, or Remove Label options) from the *Paragraph* section of the context menu.



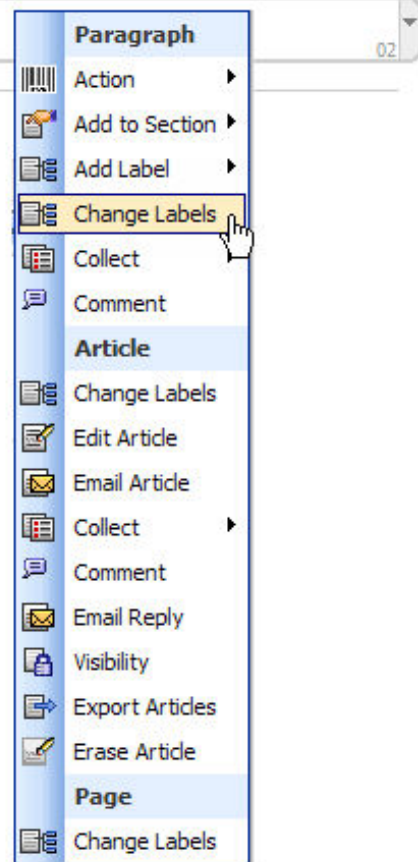
## Can I use sick days for paternity leave?

HR6 | June 5, 2006 | 11:36:58 AM EDT  
Posted by admin

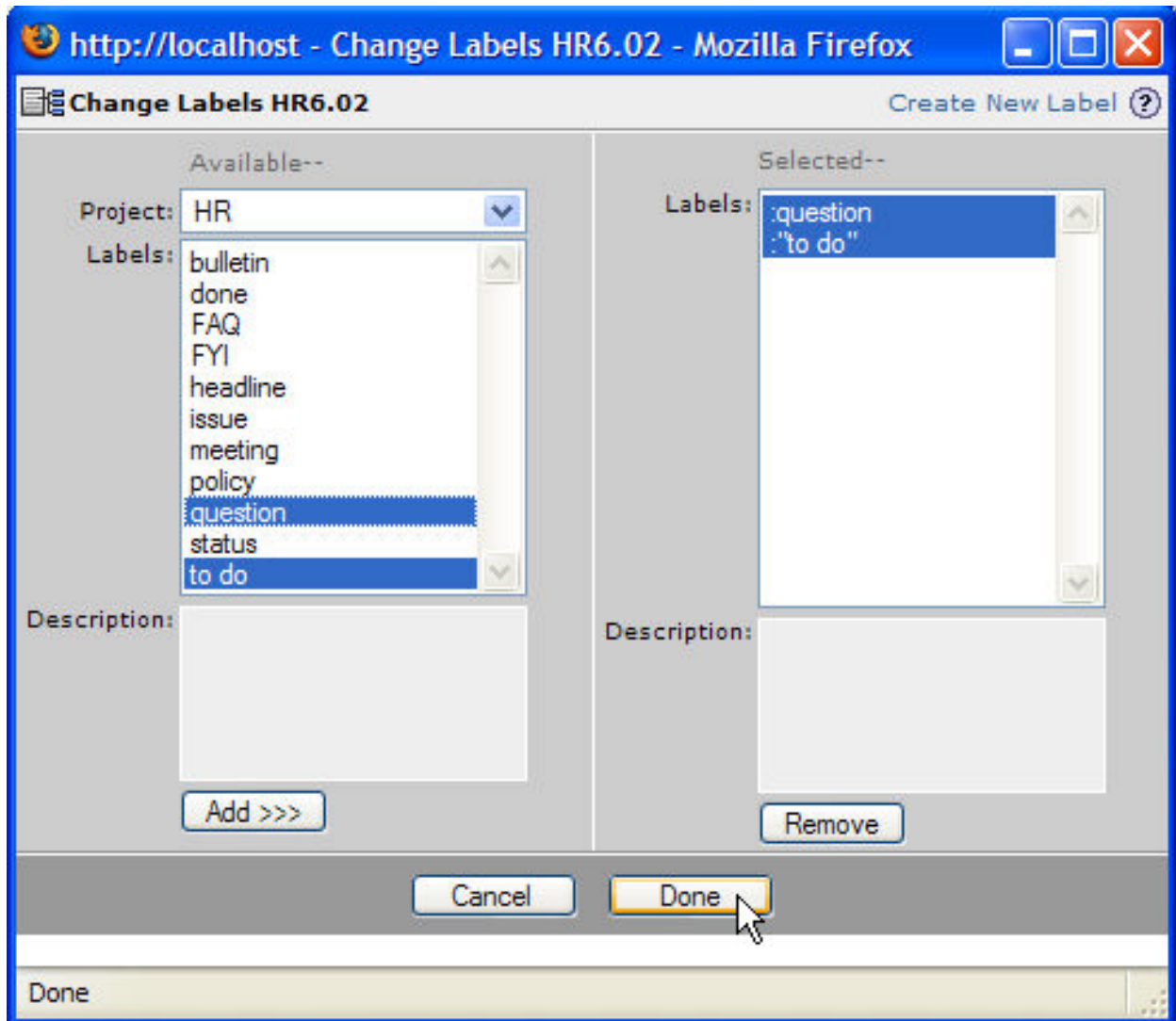
to do ☐  
FAQ  
question

I will go on paternity soon and wonder if I can be paid for the time I will be out of the office. Is it possible to use my sick days during this period of time?

Are there any other options I should be aware of?



The Change Labels dialogue appears. In this example, the *Question* and *To Do* labels have been chosen, and you window header says "Change Labels HR6.02" to indicate the paragraph number to which the action will apply.



After you click done, the article is updated, now including the *Question* and *To Do* labels on the selected paragraph:

## Can I use sick days for paternity leave?

HR6 | June 5, 2006 | 11:36:58 AM EDT  
Posted by admin

to do ☐  
FAQ  
question

I will go on paternity soon and wonder if I can be paid for the time I will be out of the office. Is it possible to use my sick days during this period of time?

Are there any other options I should be aware of?

to do ☐  
question

### Article Comments

Add a Comment on this Article

**B** *I* U ABC |
 [List Icon] [List Icon] |
 [Align Left Icon] [Align Center Icon] [Align Right Icon] |
 [Link Icon] [Image Icon] |
 Paragraph [v]
 [Smiley Icon] [Abbr Icon] HTML [Help Icon]

Post Comment in the project HR [v]

## Using Custom Label Actions

Custom label actions may have been defined by your administrator in [Server Setup - Journal](#). These may be created to make it easy to do quick actions like removing a *todo* label and replacing it with a *done* label, changing priority, assigning issues, or making articles visible to other groups.

By default, Traction provides *To Do* and *Done* actions.

Actions are listed under the Action option in the Paragraph section of the context menu.

In this example, the *Priority 1*, *Priority 2*, and *Priority 3* actions have been defined. The *Priority 1* action will add the *P1* label while also removing the *P2* or *P3* label, if present.

## Can I use sick days for paternity leave?

HR6 | June 5, 2006 | 11:36:58 AM EDT  
Posted by admin

I will go on paternity soon and wonder if I could use my sick days during this period. Is it possible to use my sick days during this period?

Are there any other options I should be aware of?

to do ☐

FAQ ☐

☐ P2 ☐

question ☐

of the office. Is it

to do ☐

question ☐

**Article**

- Action
- Add to Section
- Remove Label
- Add Label
- Change Labels
- Edit Article
- Email Article
- Collect
- Comment
- Email Reply
- Visibility
- Export Articles
- Erase Article
- Page**
- Change Labels

To Do ☐

Done ☒

Priority 1 ☒

Priority 2 ☐

Priority 3 ☐

**Article Comments**

Add a Comment on this Article

**B** *I* U ABC |

in the project

The resulting view shows the change:

## Can I use sick days for paternity leave?

HR6 | June 5, 2006 | 11:36:58 AM EDT  
Posted by admin

to do ☐  
FAQ  
P1  
question

I will go on paternity soon and wonder if I can be paid for the time I will be out of the office. Is it possible to use my sick days during this period of time?

Are there any other options I should be aware of?

to do ☐  
question

### Article Comments

Add a Comment on this Article

**B** *I* U ABC Paragraph HTML

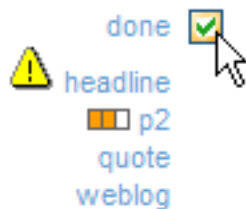
in the project HR

## Using the Checkbox to Change Between To Do and Done

Traction provides a special checkbox control to make it easy to invoke the *To Do* and *Done* actions. If your journal has actions named To Do and Done defined, you will see a checkbox to the right of the labels.

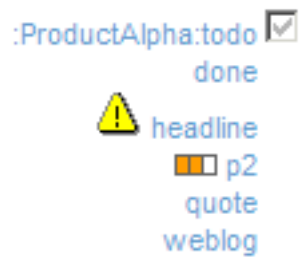


Clicking this checkbox will instantly activate either the To Do or Done action (whichever is required to change the state). After a moment, the labels will update in-place without a full page reload.

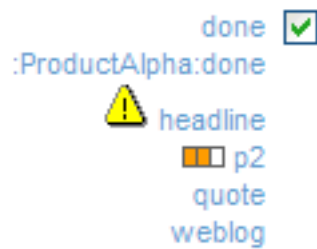


This makes it very easy to keep checklists in Traction and to check them off as issues are resolved.

**Note:** If an article has *both* todo and done labels, the checkbox shows as grey.



Clicking this checkbox will apply the To Do action, which switches all todo labels to done labels.

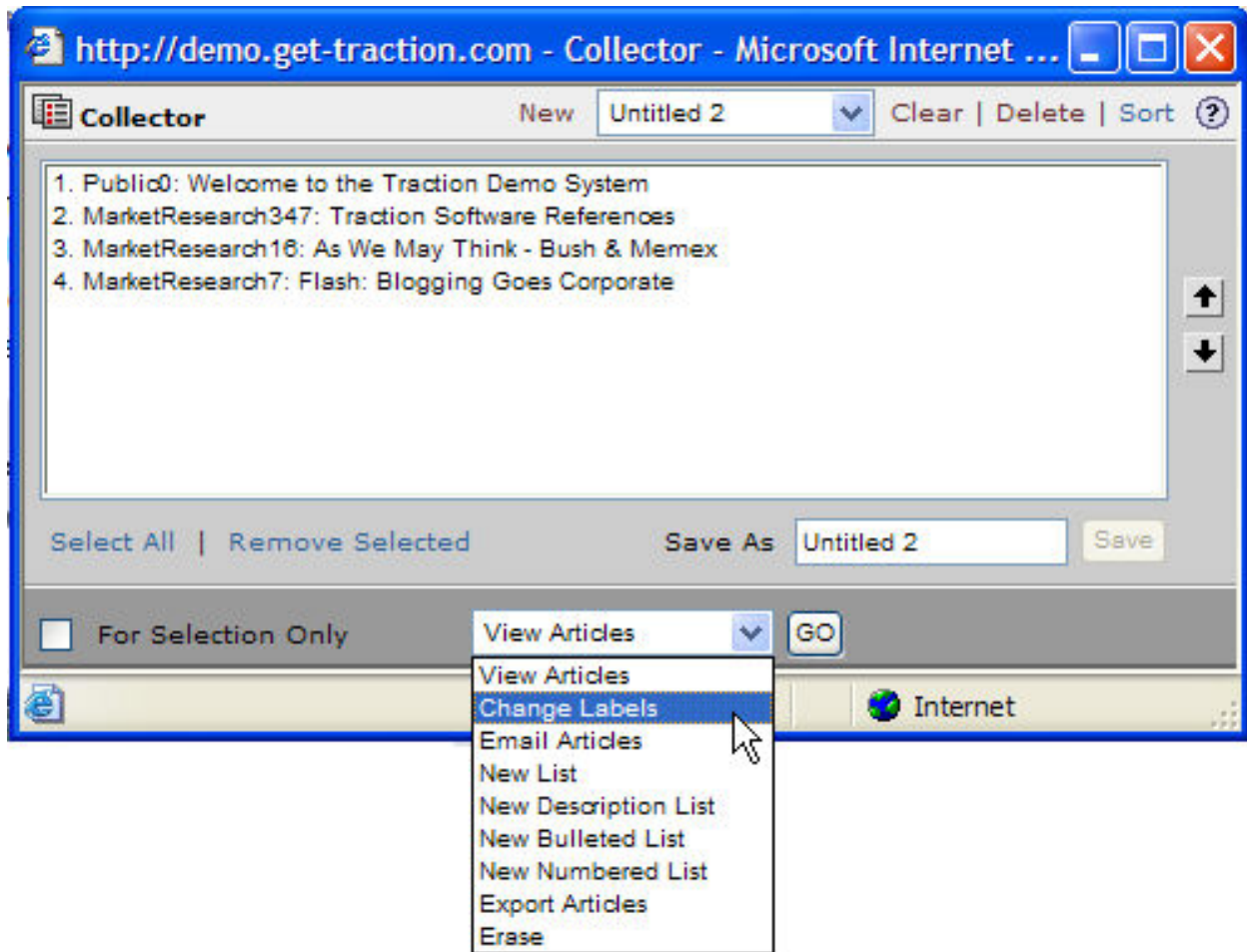


## Change Labels on Multiple Articles (or Multiple Paragraphs)

You can access the batch label change dialogue from the Page Tools menu of a multi-entry view, the Collector, or the context menu.

If you chose Change Labels from the Collector,





from the Page Tools menu of a multi-article view,



or from the Page section of the context menu, *even of a single-article view...*

December 10, 2002

## Welcome to the Traction Demo System

Public0 | December 10, 2002 | 11:39:49 PM EST | Posted by SallySu, mtraylor

This is the live demonstration journal for Traction TeamPage. If you have reached this site and are interested in a guided tour, please visit our website and fill out our contact form or call us directly at (401) 528-1145.

November 11, 2003

## Traction Software References

MarketResearch347 | November 11, 2003 | 2:52:42 AM EST | Posted by Jordan Frank

Traction Enterprise Weblog products combine the ease of use of simple deployment of personal weblog technology with group focus, context, and abilities that line up with the working communication needs of business and background on Traction Software Inc and the Enterprise Weblog market, p tionSoftware.com. Here are a few ...

## As We May Think - Bush & Memex

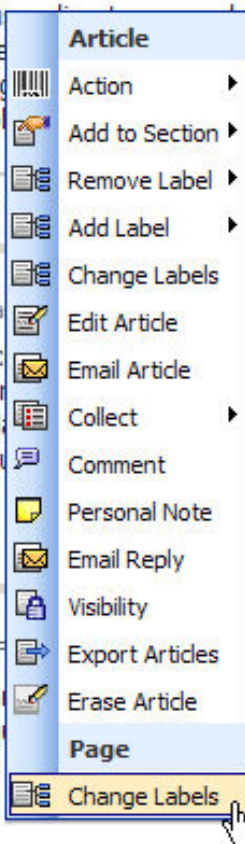
MarketResearch16 | July 8, 2002 | 10:10:28 AM EDT | Posted by Jordan Frank

This article contains the full text from Vannevar Bush's article image of his "Memex" from the 50th Anniversary celebration of the celebration, Dynamic Diagrams created a simulation to explore the shared folder (below) to your Windows computer and run the Diagrams for a Macintosh ...

## Flash: Blogging Goes Corporate


MarketResearch7 | July 5, 2002 | 5:14:54 PM EDT | Posted by Jordan Frank

By Farhad Manjoo - 2:00 a.m. May 9, 2002 PDT -- This year makes Flash and Shockwave -- has posted a \$305 million quarter lost a \$2.8 million copyright infringement suit to Adobe. But troubles, in the last week there's been a lot of good feeling saying that ...



...you will be taken to the *Change Labels on Multiple Articles* page. This is a two-page interface. The first page lists the articles that you want to change. By default, the articles from your view or collection appear. The Change Labels operation will only affect the articles with a checkbox in their row. The checkbox at the top of the column controls all the checkboxes in the column.

You can add another article to the list by typing an Article ID into the box at the bottom of the page (using Internet Explorer you can drag and drop any title or link to an article into the box).


**Change Labels on Multiple Articles - Select Articles (1/2)**

Edit Labels >>

Article ID	<input checked="" type="checkbox"/>	Title	Labels
MarketResearch347	<input checked="" type="checkbox"/>	Traction Software References	:Public:headline bulletin channel todo  todo p2
Public0	<input checked="" type="checkbox"/>	Welcome to the Traction Demo System	:Public:headline
MarketResearch16	<input checked="" type="checkbox"/>	As We May Think - Bush & Memex	bulletin :Public:headline  memex
MarketResearch7	<input checked="" type="checkbox"/>	Flash: Blogging Goes Corporate	headline :Public:headline  weblog :ProductAlpha:todo content management position quote

Edit Labels >>

Add an Article

Add Article >>


Type or drop an Article ID

Cancel

Submit

The labels for each article are shown in two groups. The first group is the article-level labels, followed by a blank line, followed the merged labels from all other paragraphs.


When you have selected the articles whose labels you want to change, click the "Edit Labels" button. This takes you to the second page of the interface. At any time, you can switch back to the first page by clicking "Show Selected Articles". You can switch back and forth as often as necessary; all your work will be preserved.


 **Change Labels on Multiple Articles - Edit Labels (2/2)**

[<< Show Selected Articles](#)




**Add Labels to or Remove Labels from Selected Articles**

**Remove Labels**




:ProductAlpha:todo 

 These labels will be removed from anywhere they appear within the article.

**Add Label**


MarketResearch  topic  123 

**Create a new Label**




MarketResearch  topic   


**Move Selected Articles**

**Replace Label**

:ProductAlpha:todo 

**With Label**

MarketResearch  topic  123 

 If you wish to replace one label with two labels, or add a label to all items already labeled with a certain label, you can create multiple rows. For example, to mark everything labeled :todo with the label :government, first create a row that replaces :todo with :todo (to keep the todo in place) and click +), then create a row that replaces :todo with :government and click +). When you submit the article, everything marked :todo will then be marked both :todo and :government.

[Cancel](#)
[Reset](#)
[Submit](#)

This page is perhaps the most powerful in Traction. Once you are familiar with it, you will find it easy, quick to use, and invaluable.

This page lets you perform four basic operations:

1. **Create a new label**, which can be used in any of the other operations.
2. **Remove an existing label from all the places it appears** in any of the listed articles in which it appears.
3. **Add a new or existing article-level label** to all the listed articles.
4. **Replace all instances** (whether article- or paragraph-level) **of one label with another** in all of the listed articles.

There is one more important operation which can be accomplished with this page, but it requires two steps:

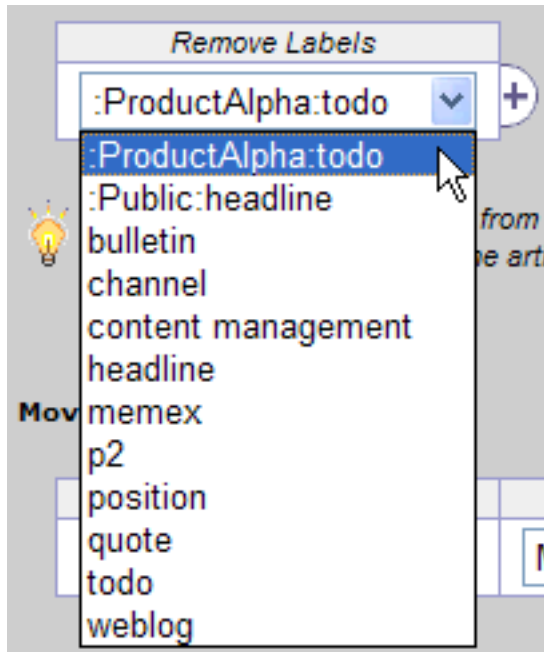
5. **Add a new or existing label to every article or paragraph where a given label appears** in all of the listed articles.

This page lets you specify as many of these operations as you like. When you press the Submit button *all* the operations you specify will be performed.

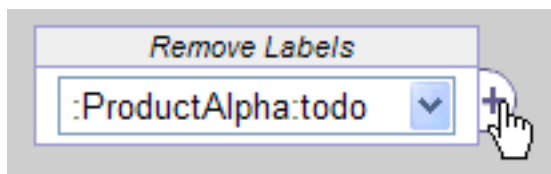
As shown above, there are currently no operations specified.

Let's say we want to remove all the todo labels from all the listed articles. We'll do this by adding the todo labels to the *Remove Labels* list.

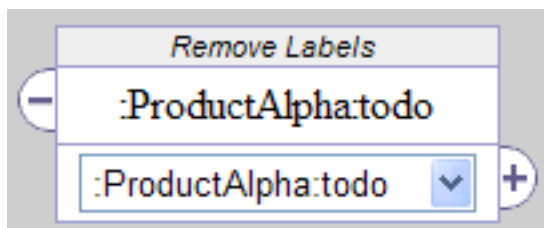
In order to add a label to this list, first choose it from the pull-down menu:



Then press the +) icon to add the label to the list:



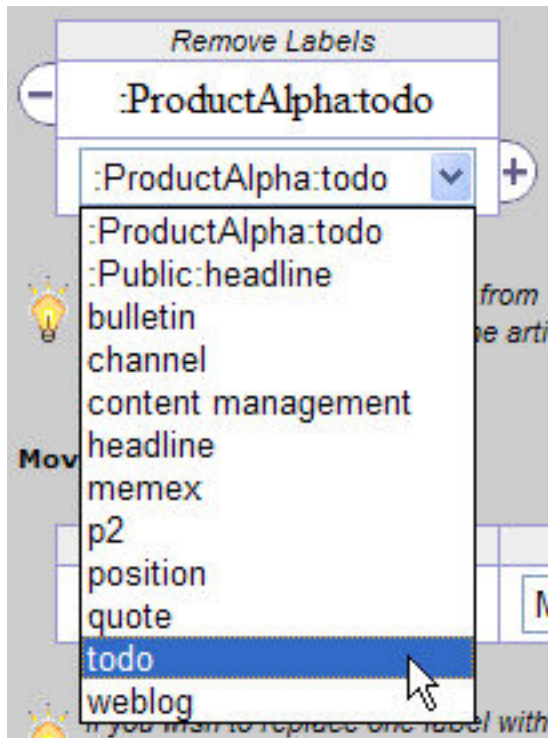
This adds the first item to the list:



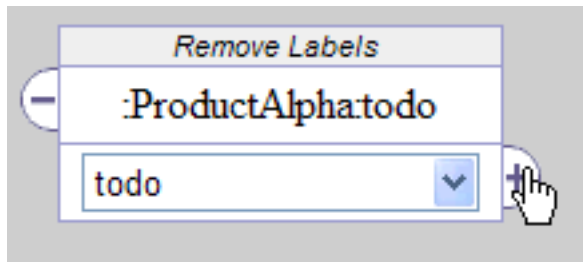
**Watch Out!** The list above contains only one item. The last row in the list is only used to add additional items. Each item that is actually *in* the list appears with a (- icon next to it. Clicking the (- removes the item from the list.

Let's add the other todo label. We select it:

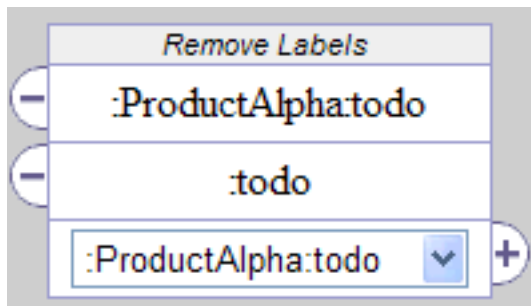




We click the +) to add it:



And it appears:



Right now you may be thinking, "Why does one of the labels have a project name listed before it and the other one not?" The answer is that this form was opened from a view focused on the MarketResearch project, so labels from that project are abbreviated (don't show the project name). You can tell the default



project by the *other* controls on this page, which all default to the source project.

The image shows two UI controls. The top control is titled "Add Label" and contains three dropdown menus: "MarketResearch" (highlighted in yellow), "topic", and "123". The bottom control is titled "Create a new Label" and contains three dropdown menus: "MarketResearch" (highlighted in yellow), "topic", and an empty text field. Both controls have a "+" button on the right.

Not at all obvious, but now you know.

If we were to submit now, the articles would be stripped of their todo labels, but would be otherwise unchanged.

Let's do more.

Let's create a new label, "Useful Example", and add it to all the articles.

To create a new label, we type it in the "Create a new Label" control. Note that labels all belong to a single project, so you can choose the project in which you want the new label to be created. Let's create it in the Public project.

The image shows the "Create a new Label" control. The project dropdown menu is open, displaying a list of projects: "admin", "CI", "Comment", "MarketResearch", "ProductAlpha", and "Public". The "Public" option is highlighted by the mouse cursor. The topic dropdown is set to "topic" and the value field contains "Useful Example".

We then press +) to add the label:

The image shows the "Create a new Label" control after the project has been changed to "Public". The project dropdown now shows "Public", the topic dropdown is still "topic", and the value field is "Useful Example". The "+" button is visible on the right.

Has the new label been created?

No! Nothing happens until you press submit. We're just saying what we *want* to happen.

So what *has* happened?

Our new "Useful Example" label has been inserted into the Add Label and Move controls.

In order for anything to happen with the new label, we need to add another operation to the list, which we have yet to do.

Since we wanted to add this label to all the articles, we'll click the +) in the Add Label control:

And the operation is added:

Now you're getting the hang of this!

So far we have three operations defined: remove ::ProductAlpha:todo from everywhere in all listed articles, remove ::MarketResearch:todo from everywhere in all listed articles, and create the label *Useful Example* in the *Public* project and add it at the article level in all listed articles.

The screenshot shows the Traction software interface with several sections:

- Remove Labels:** A list of labels to be removed, including `:ProductAlpha:todo` and `:todo`. A plus button is at the bottom right.
- Add Label:** A section to add a new label. It shows a label `+:Public:Useful Example"` and a dropdown menu with `MarketResearch` and `topic` set to `123`. A plus button is at the bottom right.
- Create a new Label:** A section to create a new label. It shows a dropdown menu with `MarketResearch` and `topic` set to an empty field. A plus button is at the bottom right.
- Move Selected Articles:** A section with two sub-sections:
  - Replace Label:** A dropdown menu with `:ProductAlpha:todo`.
  - With Label:** A dropdown menu with `MarketResearch` and `topic` set to `123`.

Below the **Remove Labels** section, there is a lightbulb icon and the text: "These labels will be removed from anywhere they appear within the article."

Time to get fancy.

Let's shoot straight to the 5th case above (we'll cover the 4th on the way). You want to add the label *memex* everywhere the label *content management* appears.

That is, we want to change all occurrences...

From	To
content management	content management memex

This currently needs to be specified using two rules.

Using the move operation, you can specify the first rule:

The screenshot shows the Traction software interface with a rule configuration section:

- Replace Label:** A dropdown menu with `:"content management"`.
- With Label:** A dropdown menu with `memex`.
- Replace Label:** A dropdown menu with `:ProductAlpha:todo`.
- With Label:** A dropdown menu with `MarketResearch` and `topic` set to `123`.

But *hold on!* Won't this *replace* the content management label with the memex label?

If we stop here, absolutely.

We need one more rule.


Replace Label	With Label
:"content management"	:memex
:"content management"	:"content management"

:ProductAlpha:todo
MarketResearch
topic
123

This second rule says, "in addition to moving content management to memex, move it to itself". I.e. preserve it. Someday this may be a checkbox, or a completely different interface, but for now just think of filling in every row and column in the From/To table above, and create a rule for each row.

From	To
content management	memex
content management	content management

There is a tip with an example right on the page to help you remember this.

 If you wish to replace one label with two labels, or add a label to all items already labeled with a certain label, you can create multiple rows. For example, to mark everything labeled :todo with the label :government, first create a row that replaces :todo with :todo (to keep the todo in place) and click +, then create a row that replaces :todo with :government and click +. When you submit the article, everything marked :todo will then be marked both :todo and :government.

Now we have covered all the cases this page can handle.

Change Labels on Multiple Articles - Edit Labels (2/2)
<< Show Selected Articles

### Add Labels to or Remove Labels from Selected Articles

Remove Labels

- :ProductAlpha:todo
- :todo
:ProductAlpha:todo +

These labels will be removed from anywhere they appear within the article.

Add Label

+ :Public:Useful Example"
MarketResearch topic 123 +

Create a new Label

MarketResearch topic +

### Move Selected Articles

Replace Label	With Label
- :content management"	memex
- :content management"	:content management"
:ProductAlpha:todo +	MarketResearch topic 123 +

If you wish to replace one label with two labels, or add a label to all items already labeled with a certain label, you can create multiple rows. For example, to mark everything labeled :todo with the label :government, first create a row that replaces :todo with :todo (to keep the todo in place) and click +, then create a row that replaces :todo with :government and click +. When you submit the article, everything marked :todo will then be marked both :todo and :government.

Cancel Reset Submit

You can add as many additional rules as you need to express the transformation you wish to accomplish. Once you are satisfied, you can press submit. A special *reclassification* article is posted that explains the transformation you just applied:

## Changes Labels on Multiple Articles


reclassification

MarketResearch1481 (#) | May 4, 2005 | 7:46:47 PM EDT

Posted by Chris Nuzum

Added: +:"Public:Useful Example"

Removed: :ProductAlpha:todo (from all items) , :todo (from all items)

Changed: : "content management" to :memex (for all items) , : "content management" to : "content management" (for all items) 01 

MarketResearch347, Traction Software References

Public0, Welcome to the Traction Demo System

MarketResearch16, As We May Think - Bush & Memex

MarketResearch7, Flash: Blogging Goes Corporate

Change Labels


View all articles

02 

Each rule is explained.

The two buttons at the bottom let you jump back to the Change Labels form you were just on or view the articles you modified.

Clicking *View all articles*, we can see that, sure enough, the paragraphs labeled *content management* are now also labeled *memex* (and all the other changed were applied too)..

The firm needed a way to quickly respond content management  
to questions developers might have as memex  
they use the new products -- and although  
some at Macromedia thought about creating a blog on  
Macromedia's site to address customers' questions, "we  
decided to experiment with the (third-party) blogs," Hale  
said. 014 

That was certainly harder than clicking a checkbox or using the regular one-paragraph Change Labels form, but much more powerful too. Consider for a moment that this tool can operate on every article in your entire journal. You can use this to reorganize your entire taxonomy while leaving a complete and accessible audit trail. We call this *dynamic schema migration*. If you're familiar with how difficult it is to reorganize other systems, you might forgive some of the shortcomings of this strange but powerful tool.

By the way, congratulations -- *now* you're a power user!

---

## Edit an Article

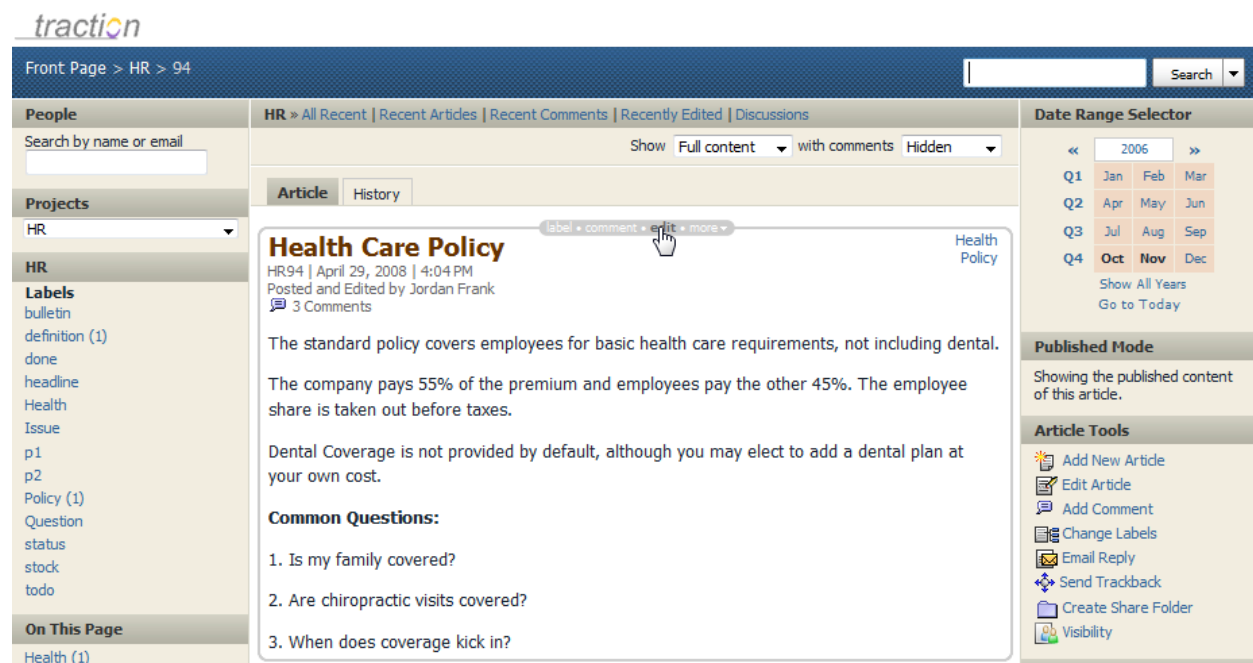


Doc74: March 22, 2008 3:55 PM, Posted by Documentation Importer, Edited by Paul Needham

Two permissions govern what articles you can edit: *Edit* and *Edit own Articles*. These permissions are controlled on a per-project basis. If you have *Edit own Articles*, you can edit any article you originally posted. If you have *Edit* permission, you can edit any article in the project, regardless of who originally posted the article.

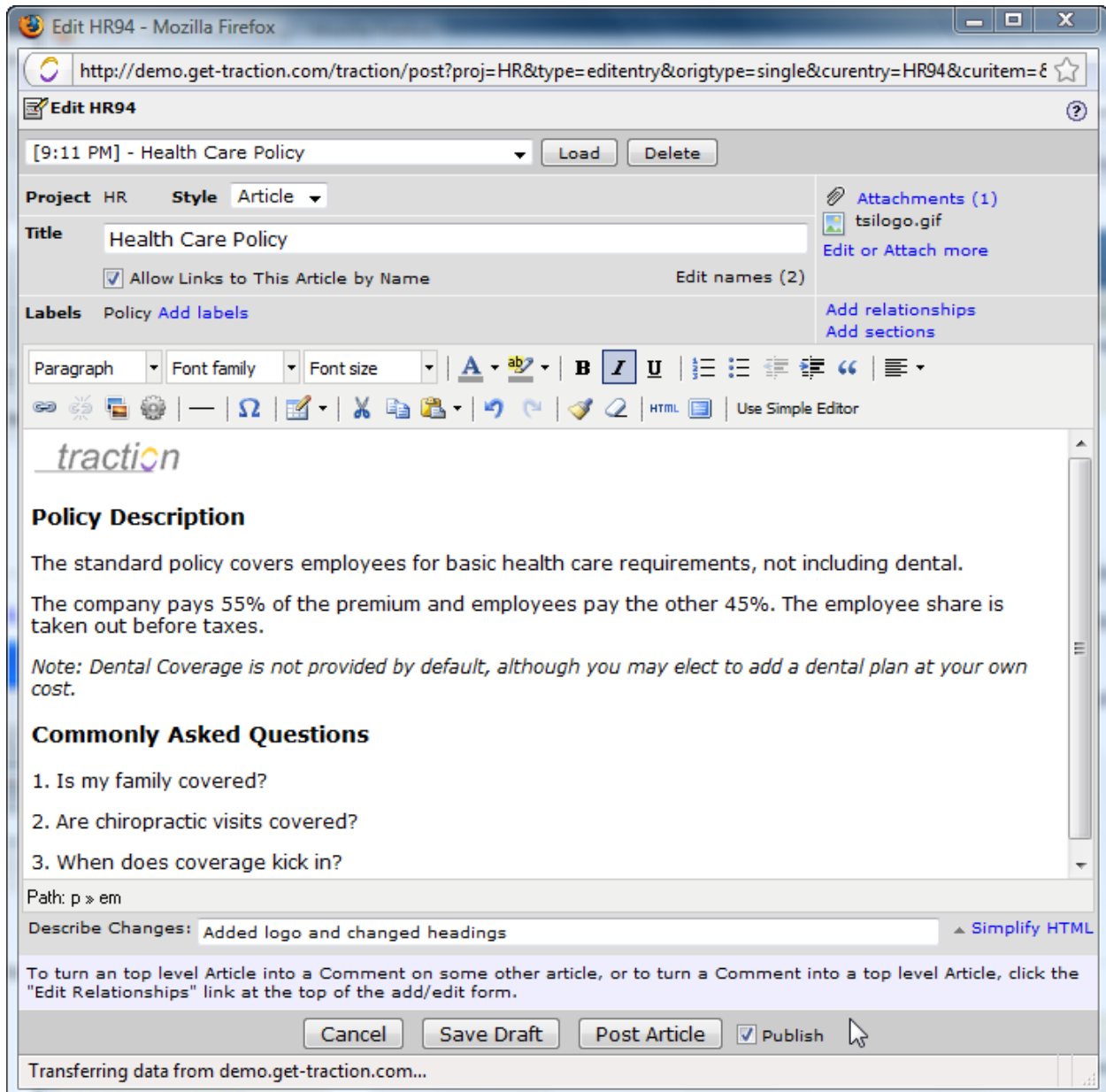
## Using the Article Editor

As shown below, you can edit an article by clicking *edit* in the frame that appears around an article or paragraph when you hover your cursor over it. You can also click *more* to display the Context Menu, then select *Edit Article* or you can click *Edit Article* in the right sidebar of single-article views.



The screenshot shows the Traction software interface. The top navigation bar includes 'Front Page > HR > 94' and a search box. The left sidebar contains 'People' (search by name or email), 'Projects' (HR selected), and 'Labels' (bulletin, definition (1), done, headline, Health, Issue, p1, p2, Policy (1), Question, status, stock, todo). The main content area displays the 'Health Care Policy' article under the 'HR' project. The article is titled 'Health Care Policy' and is dated 'HR94 | April 29, 2008 | 4:04 PM'. It was 'Posted and Edited by Jordan Frank' and has '3 Comments'. The article text describes the company's health care policy, including dental coverage. A context menu is visible above the article text, showing options: 'label', 'comment', 'edit', and 'more'. The right sidebar contains a 'Date Range Selector' for the year 2006, a 'Published Mode' section showing the published content, and an 'Article Tools' section with options: 'Add New Article', 'Edit Article', 'Add Comment', 'Change Labels', 'Email Reply', 'Send Trackback', 'Create Share Folder', and 'Visibility'.

This pops up the *Article Editor*, which is the same as is used to [add a new article](#). A few edits have been made in the example below:



You can use the rich text controls to style the text, and you can drag and drop images from other web pages into the text or insert them with the *Insert/Edit Image* tool.

If you add a paragraph between two paragraphs, Traction will create a "*Traction Item*" (using the next available number, regardless of location in the flow of text) after you submit your article. The *Article Editor* will manage this for you automatically.

**Important:** It is safe to change the order of paragraphs or make new paragraphs, but keep in mind that comments and labels are associated with the paragraph's "*Traction Item* marker." The *Article Editor* should maintain the item markers referenced by comments as part of the HTML markup, however if you find a comment no longer refers to the correct item, you will need to edit the comment's relationship or

revert the article to the prior version. Labels can simply be removed from the incorrect item and added to the correct one.

While you are in the Article Editor, you can add and remove labels by clicking on Add Labels. This will bring up the Choose Labels dialog form:

The screenshot shows the 'Edit HR94' window in Mozilla Firefox. The address bar shows the URL: <http://demo.get-traction.com/traction/post?proj=HR&type=editentry&origtype=single&curentry=HR94&curitem=6>. The page title is 'Edit HR94'. The main content area shows the article editor for 'Health Care Policy'. A 'Choose Labels' dialog box is open, displaying a list of labels: 'Policy', 'headline', and 'Health'. The 'headline' label is selected. The background shows the article editor interface with fields for Title, Project, Style, and a rich text editor containing the article content.

By default, the Choose Labels form will let you select labels from the project the article being edited is in, but you can change projects by clicking Change project or by typing in the project name starting with colon (i.e. :projectname). When typing into the Type a label box, TeamPage will auto-complete the entry based on existing labels that contain the typed string. You can either use your cursor to select one of the suggested labels or continue typing until only one match is given and then hit return to select it.

## Using TIP 2 Rather than the Article Editor

If you prefer, you can set a preference to use the Traction Instant Publisher for posting and editing instead of the HTML form. This preference is set in the Instant Publisher Preferences section of the Preferences interface.

1 Personal Info | 2 **Preferences** | 3 Password | 4 Permissions

---

### Instant Publisher Preferences

*The Traction Instant Publisher is currently only available to users running Windows 2000 or later.*

#### Version 2

*[Click here to install the Traction Instant Publisher v2.](#)*

*[Click here to configure the Traction Instant Publisher v2 for this Traction Server.](#)*



*Where possible, use the Instant Publisher v2 instead of the HTML forms for editing articles.*

*This setting only applies to your current browser.*

## Single Article View

The resulting article will now look like this in the single article view, with an *Article* tab to view the content and a *History* tab to view the edit history:



[Article](#)[History](#)

## Health Care Policy

[Health  
Policy](#)

HR94 | April 29, 2008 | 4:04 PM

Posted by Jordan Frank | Edited by Paul A. Needham

 1 Attachment |  3 Comments

### Policy Description

The standard policy covers employees for basic health care requirements, not including dental.

The company pays 55% of the premium and employees pay the other 45%. The employee share is taken out before taxes.

*Note: Dental Coverage is not provided by default, although you may elect to add a dental plan at your own cost.*

### Commonly Asked Questions

1. Is my family covered?
2. Are chiropractic visits covered?
3. When does coverage kick in?

---

## Moderated Publishing and Named Pages

Note that additional options appear in the *Article Editor* if [moderated publishing](#) and/or [named pages](#) are being used in the project that contains the article being edited. There will also be additional actions recorded in the *History* tab when these capabilities are being used.

### Edit History

Traction keeps a complete edit history. If you have Edit privileges and an article has an edit history, you will be able to view an article's edit history by clicking the *History* tab.

For instance, for this example, you can click the *History* tab to see the revision history and compare versions:

Article History

## History of Health Care Policy

HR94 | April 29, 2008 | 4:04 PM

Posted by Jordan Frank | Edited by Paul A. Needham

1 Attachment | 3 Comments

### Edit History

Compare Selected Versions

	Traction ID	Date	Time	Editor	Description of Changes	Status
<input checked="" type="radio"/>	HR297	Feb 28, 2009	9:17:47 PM EST	Paul A. Needham	Added logo and changed headings	Published
<input checked="" type="radio"/>	HR287	Feb 4, 2009	2:50:25 PM EST	Jordan Frank	changed 50/50 to 55 45	Published
<input type="radio"/>	HR104	May 2, 2008	11:26:47 AM EST	Jordan Frank		Draft
<input type="radio"/>	HR103	May 2, 2008	11:24:43 AM EST	Jordan Frank	Added Health Policy and Health Care Policy Page Names	Published
<input type="radio"/>	HR98	May 2, 2008	11:12:09 AM EST	Jordan Frank		Draft
<input type="radio"/>	HR95	Apr 29, 2008	4:04:57 PM EST	Jordan Frank	Added paragraph about company paying 50%	Draft
<input type="radio"/>	HR94	Apr 29, 2008	4:04:28 PM EST	Jordan Frank	Original Version	Published

### Name History

Traction ID	Date	Time	Editor	Action	Name ID	Linked To	Status
HR104	May 2, 2008	11:26:47 AM	Jordan Frank	+Health Policy	79 (HR)	HR94	Draft
HR103	May 2, 2008	11:24:43 AM	Jordan Frank	+Health Care Policy	78 (HR)	HR94	Published

### Moderation History

Traction ID	Date	Time	Moderator	Action	Version
HR297	Feb 28, 2009	9:17:47 PM	Paul A. Needham	Published	HR297
HR296	Feb 28, 2009	8:37:02 PM	Paul A. Needham	Published	HR287
HR143	Jul 29, 2008	10:37:44 AM	Jordan Frank	Published	HR103
HR102	May 2, 2008	11:19:21 AM	Jordan Frank	Published	HR94
HR100	May 2, 2008	11:17:11 AM	Jordan Frank	Unpublished	HR95
HR96	Apr 29, 2008	4:05:05 PM	Jordan Frank	Published	HR95

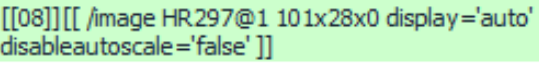
When you click *Compare Selected Versions*, you see a side by side comparison showing additions and deletions. You can also click to edit from a previous version:



Article	History	Compare Versions
---------	---------	------------------

### Changes between HR287 and HR297

[Show Complete History](#)

HR287	HR297
February 4, 2009 2:50:25 PM EST Jordan Frank <i>changed 50/50 to 55 45</i>	February 28, 2009 9:17:47 PM EST Paul A. Needham <i>Added logo and changed headings</i>
<a href="#">← Previous Revision</a>	<a href="#">Current Revision</a>
Health Care Policy	Health Care Policy
	+ 
	+ <b>Policy Description</b>
[[01]]The standard policy covers employees for basic health care requirements, not including dental.	[[01]]The standard policy covers employees for basic health care requirements, not including dental.
[[07]]The company pays 55% of the premium and employees pay the other 45%. The employee share is taken out before taxes.	[[07]]The company pays 55% of the premium and employees pay the other 45%. The employee share is taken out before taxes.
[[02]]Dental Coverage is not provided by default, although you may elect to add a dental plan at your own cost.	+ [[02]] <b>Note:</b> Dental Coverage is not provided by default, although you may elect to add a dental plan at your own cost.
- <b>Common Questions:</b>	+ <b>Commonly Asked Questions</b>
[[04]] 1. Is my family covered?	[[04]] 1. Is my family covered?
[[06]] 3. When does coverage kick in?	[[06]] 3. When does coverage kick in?
	+ <b>[[010]]</b>
<a href="#">Edit Article as of this Version</a>	<a href="#">Edit Article as of this Version</a>

### Full Contents of HR297

February 28, 2009  
9:17:47 PM EST

## Health Care Policy

HR297 | February 28, 2009 | 9:17 PM  
Posted by Jordan Frank | Edited by Paul A. Needham

Health  
Policy

## Cross References

The Cross References view is another way to view an article's history, including many actions beyond just the edit history. The cross references link will appear in article details when other articles link to it. If it does not appear you can type the Rapid Selector expression /x in the search box to access this powerful view which provides a historical view of the article and related references:

## Sample Engineering Questions

Engineering6 | September 27, 2005 | 2:53:40 PM EDT

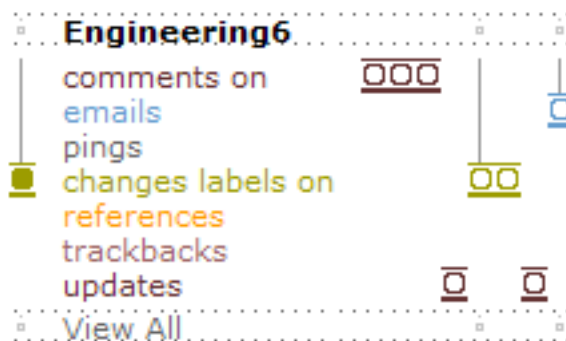
Posted and Edited by admin | View edit history

[Cross References](#) | [3 Comments](#)

.

It will provide a map view of all edits (updates), comments, references, reclassifications and other changes associated with this article.

### [Cross References: Engineering6: Sample Engineering Questions](#)



See [Audit Trail](#) for more detail on this feature.

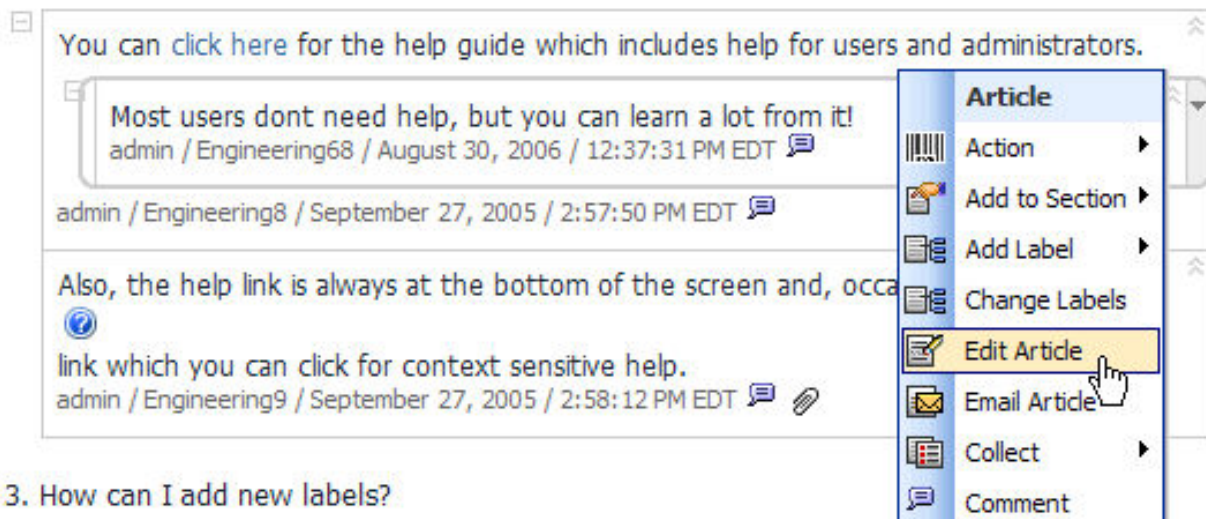
### Editing Relationships

The *Edit Relationships* option appears in the browser based *Article Editor* (Not in the TIP). This form allows you to remove or change relationships like "comments on" between articles, or to add additional relationships.

Lets take the example of a comment within a comment on an article. If we want to change the location of the comment, we can modify its comments on relationship so that it comments on the main article paragraph rather than the comment in which it is embedded.

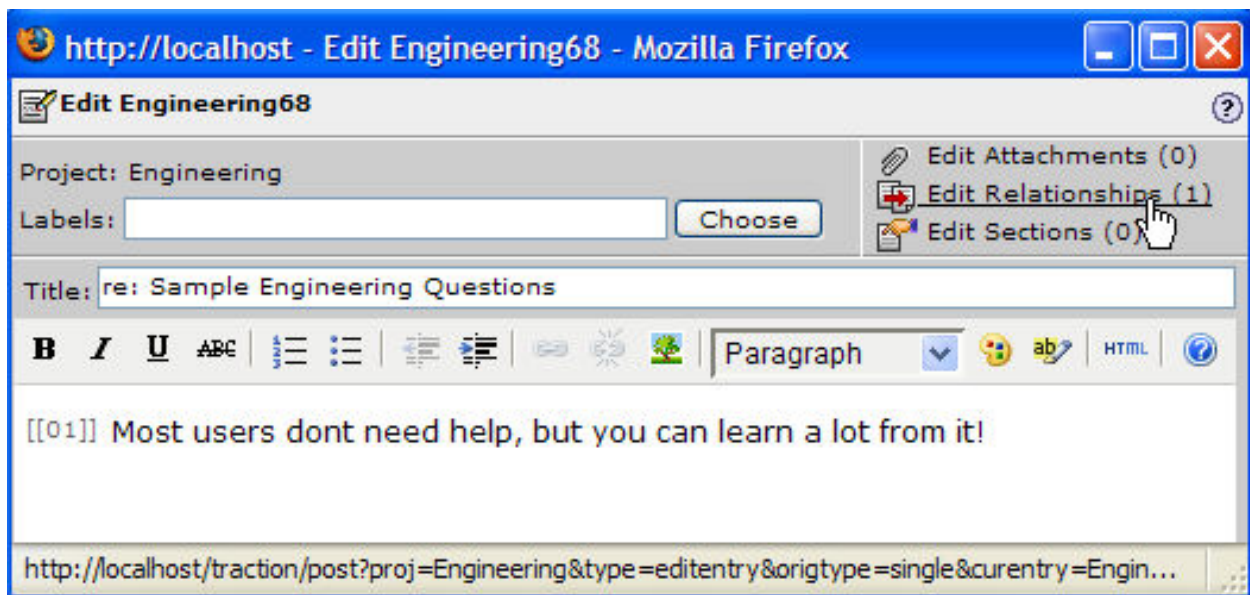
We can right-click on the comment and choose Edit Article.

## 2. How do you find Traction Help?



## 3. How can I add new labels?

This shows the comment in the Edit form.



We can click the Edit Relationships link to open the Edit Relationships dialog.

http://localhost - Edit Relationships - Mo...

**Edit Relationships** [Create a New Relationship](#)

Relationship	to Article ID
comments on ▼	Engineering8.01

[More Relationships](#)

[Cancel](#) [Done](#)

Done

If we want to remove the *comments on* relationship, we could just clear out the "to Article ID" field. But in this case, we want to make it comment on Engineering6.03 (the paragraph within the lead article) rather than the first paragraph of the comment (Engineering8.01) it is commenting on.

http://localhost - Edit Relationships - Mo...

**Edit Relationships** [Create a New Relationship](#)

Relationship	to Article ID
comments on ▼	Engineering6.03

[More Relationships](#)

[Cancel](#) [Done](#)

Done

Now, after we click Done and click to submit the Edit Comment form, the comment now appears at the bottom of the comment stack rather than embedded on the first one:

## 2. How do you find Traction Help?

You can [click here](#) for the help guide which includes help for users and administrators.

admin / Engineering8 / September 27, 2005 / 2:57:50 PM EDT

Also, the help link is always at the bottom of the screen and, occasionally you will see a

link which you can click for context sensitive help.

admin / Engineering9 / September 27, 2005 / 2:58:12 PM EDT

Most users dont need help, but you can learn a lot from it!

admin / Engineering68 / August 30, 2006 / 12:37:31 PM EDT

## 3. How can I add new labels?

Let's not do that. Instead, we'll add an additional relationship, and create a new one.

To add another relationship, we click the More Relationships button.

**Edit Relationships**

Create a New Relationship:

Relationship

comments on

▼

to Article ID

ProductAlpha102.02

More Relationships

Cancel

Done

It is a rare case where you may want to edit relationships, but its a great capability to know about! In another example, here is a case were additional relationships are added from scratch

You can also create new relationship types by clicking "Create a New Relationship".

Relationship	to Article ID
comments on	ProductAlpha102.02
disagrees with	ProductAlpha102.02

More Relationships

Then typing a name for the relationship.

Script Prompt:

Create a New Relationship:

exemplifies

OK

Cancel

For more information on custom relationships, see [Topics vs. Relationships](#).

The most common use of this form is changing *comments on* relationships.

## Erasing

Doc97: March 22, 2008 3:58 PM, Posted by Documentation Importer

### Erasing Articles

Some content may be posted to your Traction journal that absolutely must be erased.

## Purchase Confirmation

Public39 (#) | TrackBack | June 1, 2005 | 1:28:36 PM EDT  
Posted by Chris Nuzum

I purchased the encyclopedia set using my Real Credit credit card, account number 5312-2131-4435-7678, expiration 07/09, card ID number 535. 01


While you can edit an article to hide the content, editing will preserve the history of the article.



## Purchase Confirmation

Public39 (#) | TrackBack | June 1, 2005 | 1:28:36 PM EDT

Posted and Edited by Chris Nuzum | View [edit history](#) 

I purchased the encyclopedia set. 01 

Users with edit permissions will be able to see the edit history, which will show the original article.

In cases like these, you can *erase* a record in the journal.

### ***Selecting Articles to Erase***

The Erase Articles option can be accessed in three places:

**1. The Page Tools Menu** - Which will invoke the Erase dialogue with all the articles selected from the page you are viewing:



2. the Context Menu - Which allows you to invoke the Erase dialogue for the article you are hovering over.

## FAQ

Add to This Topic

June 6, 2006

### What is a Bulletin?

Engineering53 | June 6, 2006 | 4:06:14 PM EDT  
Posted by admin

bulletin  
FAQ

The Bulletin label and corresponding section is used like a bulletin board to show key group information, regardless of how new or old it may be. If you navigate forwards or backwards in time, the contents of the section will change to reflect the selected time period, but the Bulletins section will remain the same.

The Bulletin section is ordered chronologically (in Server Setup | Default Display).

### Frequently Asked Questions

Engineering47 | June 6, 2006 | 3:57:38 PM EDT  
Posted and Edited by admin | View edit

bulletin  
FAQ

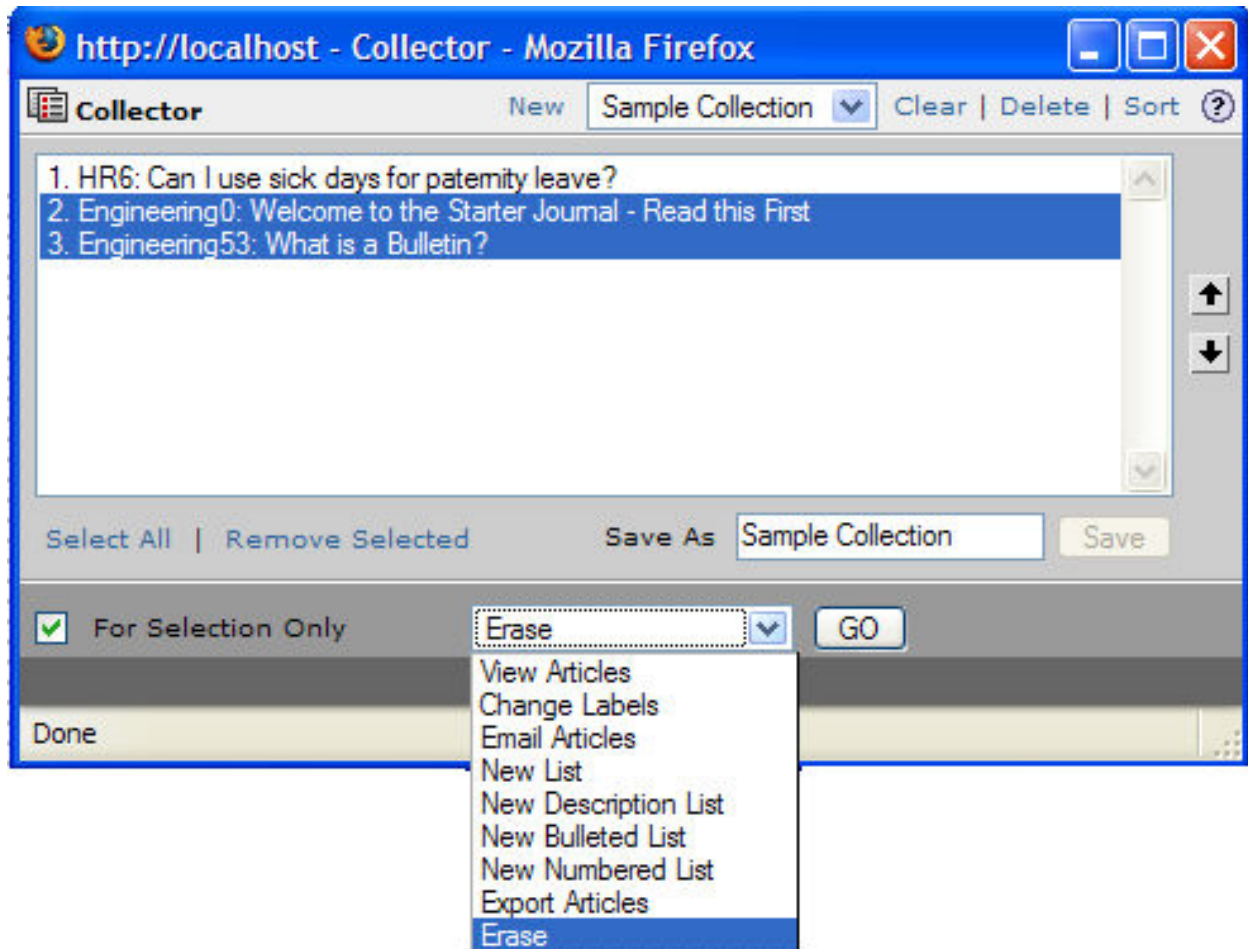
This article includes a section which is marked with the Engineering project label. A button users can click to add an FAQ to any other article in the system.

#### FAQS - TITLES SORTED BY ALPHABETICALLY

Frequently Asked Questions  
How Many Pickles in a Peck?  
What is a Bulletin?

- Paragraph
- Action
- Add to Section
- Add Label
- Change Labels
- Collect
- Comment
- Article
- Change Labels
- Edit Article
- Email Article
- Collect
- Comment
- Email Reply
- Visibility
- Export Articles
- Erase Article
- Page
- Change Labels

3. **The Collector** - Which allows you to select any or all articles you have in a collection.



### ***Using the Erase Articles Dialogue***

All of these operations launch the Erase Articles window. The list of articles to erase appears in the top of the window. The erase form also lets you indicate whether you wish to erase only the exact article listed, or the article's entire edit history. Erasing any article in the history except for the last one will not affect the display of views other than the edit history.

When you erase articles, an *erasure* record is recorded. You can select the project to which you want to post the erasure and type an explanation for why you are erasing the articles listed.

Article ID	<input checked="" type="checkbox"/> Erase	Title	<input checked="" type="checkbox"/> Erase edit history
Public39	<input checked="" type="checkbox"/>	Purchase Confirmation	<input checked="" type="checkbox"/>
<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>

\* you do not have permission to erase this article

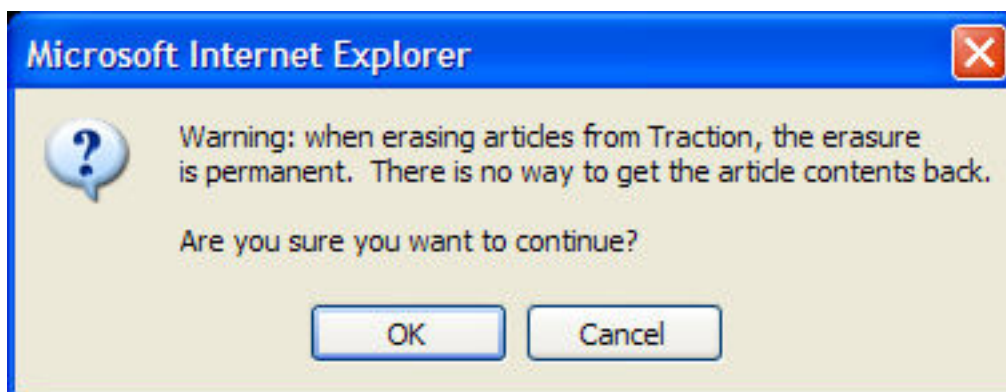
Add Article >>

Post this erasure description to the project: admin (required)

I removed this article because it included an employee's credit card number.

Cancel Erase Articles

When you have entered this, press the Erase Articles button. Traction will ask you to confirm the erase operation.



When the erase operation has completed, you will see the erasure.

## Erased Articles

[erasure](#)

admin97 (#) | TrackBack | June 1, 2005 | 9:40:32 PM EDT

Posted by Chris Nuzum












 Cross References




I removed this article because it included an employee's credit card number. 01 

[Public39](#) ([Public40](#), [Public39](#))

02 

Add a Comment on this Article

**B** *I* U ABC        Paragraph    HTML 

Post Comment in the project [admin](#)   

### Related Articles

[references \(1\)](#)

[Public39: \(erased\)](#)

In this case, article Public39 and its edit history were erased; the record indicates that the exact articles erased were Public39 and Public40.

Underneath the *Related Articles* links, you can see that the title of the erased articles is now displayed as *erased*.

### Related Articles

[references \(1\)](#)

[Public39 \(erased\)](#)

Clicking the *references* link shows the article, and you can verify that no content appears, either in the article:











(erased) 

Public39 (#) | TrackBack | June 1, 2005 | 1:28:36 PM EDT

Posted and Edited by Chris Nuzum | [View edit history](#)


 [Cross References](#)



**Add a Comment on this Article**

**B** **I** **U** **ABC**        **Paragraph**   **ab**  **HTML** 

**Post Comment**

in the project

**Comment** 

Or in its edit history:



---

## (erased)

Public41 (#) | [TrackBack](#) | June 1, 2005 | 9:40:32 PM EDT

Posted and Edited by [Chris Nuzum](#) | [View edit history](#)

 [Cross References](#)

---

### Related Articles

referenced by (1)

[admin97: Erased Articles](#)

---

## (erased)

Public40 (#) | [TrackBack](#) | June 1, 2005 | 1:31:58 PM EDT

Posted and Edited by [Chris Nuzum](#) | [View edit history](#)

 [Cross References](#)

---

### Related Articles

referenced by (1)

[admin97: Erased Articles](#)

---

## (erased)

Public39 (#) | [TrackBack](#) | June 1, 2005 | 1:28:36 PM EDT

Posted by [Chris Nuzum](#)

 [Cross References](#)

---

### Related Articles

referenced by (1)

[admin97: Erased Articles](#)

---

Normally neither erased articles nor erasures (nor update nor reclassification records) appear in standard views like chronology views. If you wish to display these records, you can change the preference for whether to [Hide System Articles](#)

---

## Embedding Sections in Articles

Doc87: March 22, 2008 3:56 PM, Posted by Documentation Importer

As of version 3.7, Traction allows users to define their own sections and embed them in articles. This lets users display a list of links or even full articles within the body of an article. This has many useful applications.

- Maybe you want to have a page that dynamically lists all *meeting notes* or *open issues* or *HR policies*.
- Maybe you want to create a custom *start page*, like the front page, but customized show content ordered in the way that delivers you the cross section of content that you need to see when you open Traction.
- Maybe you want to make a wiki-style page to take over the Project Newspaper, but you want it to include dynamic link lists.

Embedding user-defined sections in an article handles all these use cases and more.

Sections can be based on static lists of links, a collection you have in your Collector, or a query for any cross section of content.

The same principles apply here as in [Changing Front Page and Newspaper Section Layouts](#).


Back in the help topic [Making Links to Traction Articles](#), the example was an article with links to HR Policies. If a new policy is added, the author would have to edit the article and insert the new link to keep it current. Since all the target articles have the Policy label, using an embedded section to dynamically aggregate content would have made more sense!

Here is the article as it was published with written links:

### HR Policy Overview

HR13 | August 30, 2006 | 10:17:25 PM EDT

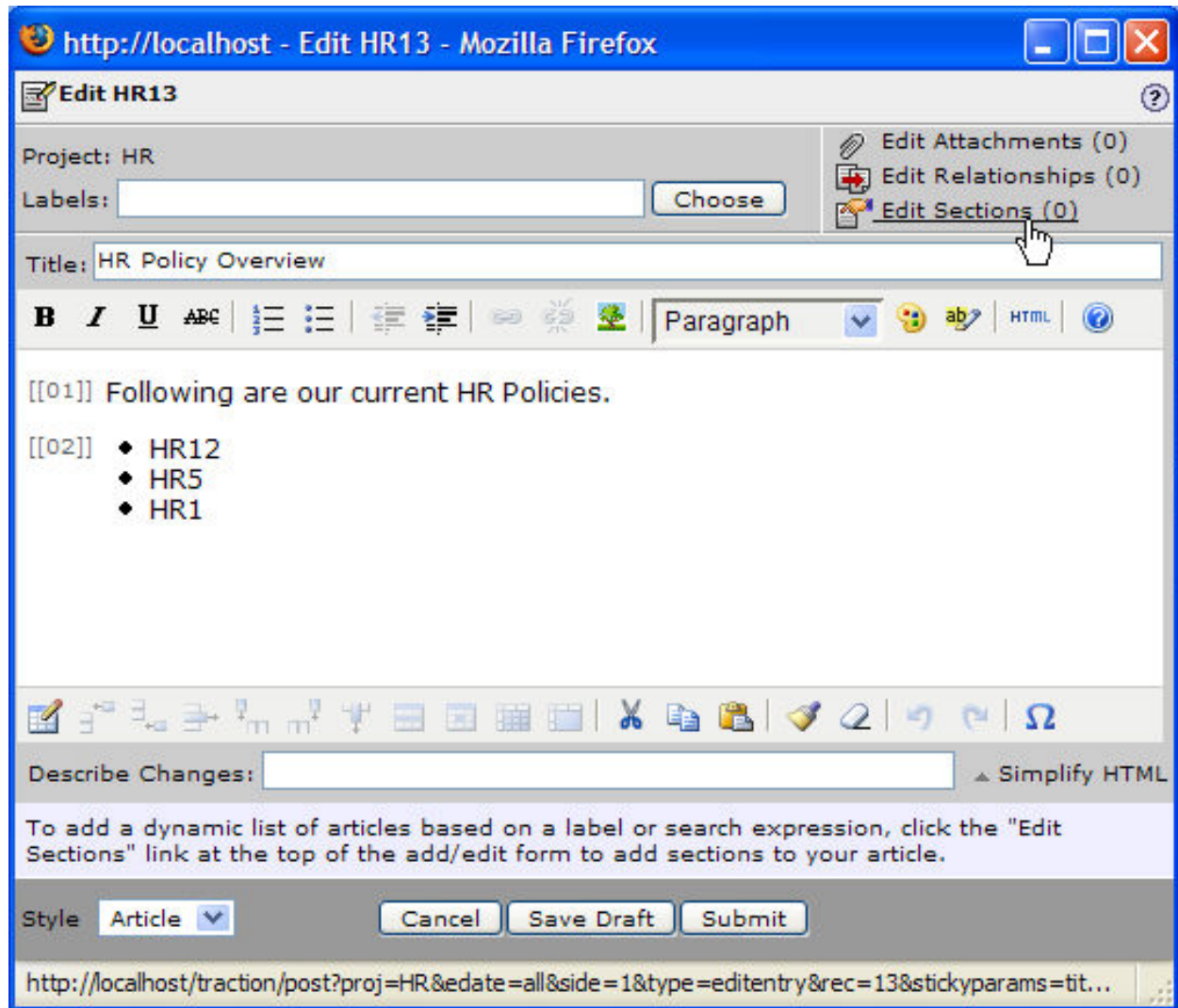
Posted by admin

 Cross References

Following are our current HR Policies.

- [HR12: Vacation Policy](#)
  - [HR5: Recruiting and Hiring Policy](#)
  - [HR1: 401K Policy](#)
- 

Clicking Edit Article shows the text and the links:



http://localhost - Edit HR13 - Mozilla Firefox

**Edit HR13**

Project: HR

Labels:

[Edit Attachments \(0\)](#)

[Edit Relationships \(0\)](#)

[Edit Sections \(0\)](#)

Title:

**B I U** [ABC](#) [List](#) [Table](#) [Link](#) [Image](#) [Paragraph](#) [HTML](#)

[[01]] Following are our current HR Policies.

[[02]]

- ◆ HR12
- ◆ HR5
- ◆ HR1

To add a dynamic list of articles based on a label or search expression, click the "Edit Sections" link at the top of the add/edit form to add sections to your article.

Style

http://localhost/traction/post?proj=HR&edate=all&side=1&type=editentry&rec=13&stickyparams=tit...

Now click Edit Sections to create a section. The Edit Sections Dialogue appears, and we can define our section to pull in all articles with the :policy label:

http://localhost - Edit Sections - Mozilla Firefox

Edit Sections

- After defining sections, include them in your article by typing `[[section key]]` where *key* is the ID, Title, or Number of the section in the list.

Sections

Current HR Policies

New Copy Delete

Edit Selected Section

ID  (optional) ☒ Active

☐ Use the Id to get the Title from a localized resource

Section Title

Show Section Title

☒ Show Add Article Link

Type

Labels

Search

Min

Max

☒ Ignore date range and include all articles

☐ Skip articles appearing in other sections ?

Sorting

Volume

Width

Show ☒ Title ☐ Details ☐ Labels ☐ Comments ☐ Attachments

Include ☒ Articles ☒ Comments ☐ Trackbacks ☐ Other

Cancel OK

Done

You can define any number of sections to embed. In this case, we only need one. This section is configured as follows:

- The ID is policies. This will be used in the article body to create a reference to this section that Traction will replace with the actual section itself when displaying our article.
- The section will show a section title and an Add Article button.
- The section query is Label-driven (*rather than Label Added, Label Removed, a Collection, Recent Articles, or Specific Articles*). The label is Policy.
- The section will ignore the date range selected by a user when viewing the article.
- The contents of the section will order alphabetically (*rather than forward chronology, reverse chronology, or random*)
- The section will display only article titles (*rather than including article details, content snippets, brief*

*content, or full content)*

We can click *OK* to return to the Edit Article window, where we delete the old static list of articles and replace it with the syntax for including our section:

The screenshot shows a web browser window with the following elements:

- Address Bar:** http://localhost - Edit HR13 - Mozilla Firefox
- Title Bar:** Edit HR13
- Form Fields:**
  - Project: HR
  - Labels: [Text Input Field] Choose
  - Title: HR Policy Overview
- Rich Text Editor:**
  - Paragraph dropdown menu set to Paragraph.
  - Content:
 

[[01]] Following are our current HR Policies.

[[02]] [[section policies]]
- Status Bar:**
  - Describe Changes: [Text Input Field]
  - Simplify HTML button
  - To add a dynamic list of articles based on a label or search expression, click the "Edit Sections" link at the top of the add/edit form to add sections to your article.
  - Style: Article [Dropdown Menu]
  - Buttons: Cancel, Save Draft, Submit

Now we click *Submit* to republish the article to reflect our updates. It now displays the section we've defined, in the location in which we indicated we wanted it displayed:

## HR Policy Overview

HR13 | August 30, 2006 | 10:17:25 PM EDT  
Posted and Edited by admin | [View edit history](#)

Following are our current HR Policies.

### CURRENT HR POLICIES

[Add](#)

[401K Policy](#)

[Recruiting and Hiring Policy](#)

[Vacation Policy](#)

---

Now, if any post is added with the Policy label from the HR project, it will appear in this list automatically. Additionally, anyone with the appropriate Author permission can easily add to the section by clicking the *Add* button, which will bring up a Create New Article window with the HR Project and the Policy label selected.

---

## Sharing and Managing Files in Traction

Doc358: April 29, 2008 11:34 AM, Posted by Christopher Nuzum, Edited by Paul Needham

- Introduction to Sharing and Managing Files in Traction
    - [The WebDAV Standard](#)
    - [How is WebDAV Used in Traction TeamPage](#)
    - [Where are Files Shared and Managed in TeamPage](#)
    - [Controlling Access to Files and Folders](#)
  - Navigating Folders and Accessing Documents
    - [Using the Document Management Interface \(DMI\)](#)
    - [Inspecting and Managing Files via the File Details View](#)
    - [Using Windows Web Folders](#)
    - [Using Macintosh OS X WebDAV](#)
  - Editing and Version Control
    - [Putting a File Under Version Control](#)
    - [Checkout Checkin](#)
    - [Locking](#)
    - [Editing Microsoft Office Files in Windows](#)
    - [Editing WebDAV Files on the Macintosh](#)
    - [Autoversioning](#)
    - [TeamPage Options and Configuration Settings](#)
  - WebDAV Administration
    - [WebDAV Administrative Settings](#)
- 

## Concepts of Wiki Projects



Doc522: December 26, 2008 7:25 PM, Posted and Edited by Paul Needham

Traction projects are most often used for some combination of knowledge management (where wiki page naming is a useful feature) and communication (where page naming is not necessary - and a distraction). Accordingly, the defaults are such that page naming is optional but can be forced in a given project.

A project in Traction can be configured to make it easy for groups to author and organize articles to create "wiki-style" websites, such as [www.wikipedia.org](http://www.wikipedia.org) or the online [Documentation](#) project that you are reading right now. Indeed, while providing the key features needed for creating wikis, Traction TeamPage goes well beyond these to meet the needs of enterprise users.

Some basic concepts of a wiki are to:

1. Make it easy for a number of people to jointly author and edit pages in a workspace or site
2. Maintain a "name space" where all wiki page names are unique (and allow for assignment of page name aliases to any given page)
3. Make it possible to link easily from one article to another by using a page name and common syntax "[[Your Page]]" or a link tool

Traction TeamPage meets these requirements, plus:

1. Integrates these capabilities with all of the security features and enterprise weblog support inherent in Traction's architecture
2. Extends the concept of assigning page name aliases to allow for Global Page Names (where the Namespace is independent from any project, but points to a given article in a given project) and allow for assigning cross-project aliases (allowing you to assign a page name in one project to an article in another project).
3. Displays "incoming" links (in a *Referenced By* list) but screens the links based on the reader's permission to read (or read draft) in the projects which contain articles linking to a given article/page.
4. Provides [Page and Comment Moderation](#) that makes it easy to divide authoring and publishing roles and maintain a stable view of published content while an updating process is underway
5. Allows "fearless refactoring" of page names during rework given the sophisticated [Page Name Management and Name History](#) capabilities provided

When a project administrator configures the project to use a wiki template and settings, the following are generally true:

- The [Newspage Sections](#) on the project's newpage starts with (or may only have) a single section that is set to show a specific article in Full volume (so the whole article is displayed, as opposed to title or snippet). That article will be used for top level navigation, with links to other articles edited into it.
- Additional sections may be used to manage the wiki process (showing recent edits, orphaned pages, renamed pages, draft pages, requested pages)
- Additional sections may be used to show important cross-sections of content (e.g. Pages tagged FAQ shown alphabetically)
- The [Default Entry Style](#) is set to Page instead of Article
- Both [Name Articles by Default](#) and [Require Articles in This Project to Have at Least One Name](#) are set to Yes.
- The left column navigation (typically a list of labels for a project) may be authored by the project administrator to use [Project Navigation Links](#) to provide direct navigation to key pages (as has been done in this Documentation project)
- Most article links are made to *Page Names* rather than Traction article IDs

The use of the *Moderated Publishing* model to allow articles to have both Draft and Published states/versions is optional and is not limited to use with wiki-style projects. However, it will frequently be used with wiki-style projects, as their content is often created and maintained as formal online

documentation.

---

## ***Page Name Management and Name History***

Doc518: December 26, 2008 6:00 PM, Posted by Paul Needham, Edited by Jordan Frank

The concept of a name space is central to wikis. Each page in a wiki has a unique name, allowing you to link to that specific page by its page name (which generally is also the page title). Traction TeamPage delivers the ease and power of Named Pages without the constraints for less formal use cases that don't require it. TeamPage also offers a Global Name Space (that spans all wiki projects) and allows you to Alias Page Names across projects.

This article discusses Page Name concepts and how to add Page Names to articles. For information on the GUI or syntax required to make links, see [Linking to Named Pages](#).

### ***Named Pages - Name When You Want To, Not Because You Have To***

Page Names are useful when making a "Forward Link" by page name to pages which do not exist yet (a fast way to built out a document or site) or when you want to assign a page name to a knowledge asset (like an encyclopedia name) that should have unique name.

For example, in the HR wiki, there should only be one article with the page name *Pension Plan*. This way, if anyone writes a link to that page name (using the link by name feature of the link tool, or by using wiki syntax "[[Pension Plan]]"), the link will go to the correct *Pension Plan* article. You can setup the HR project to force all articles to have a page name, or you can relax that constraint which could allow someone to haphazardly post questions, status reports or other types of content that has the title *Pension Plan*, but not the page name.

For less structured cases like writing status reports and meeting notes, asking questions or raising issues, assigning a Page Name to an article (and being mindful of what might be "good" name) is not necessary or helpful. But, in that context, using page names for forward links or to create a subset of "wiki" content that is assigned page names can be very useful.

In Traction TeamPage, the project administrator can enforce the use of unique Page Names in each project, or can make Page Names optional. You can see the checkbox that lets you toggle whether to give this article a name in the Edit dialog:

HR0: 401K Policy for Employees. The attached powerpoint explains the pension program.' At the bottom, there is a 'Describe Changes:' field, a 'Simplify HTML' link, and a note: 'When you edit an article, a number called an Item ID appears in front of each paragraph. This number ensures that paragraph level links, labels, and comments remain associated with the paragraph after editing.' The bottom of the form has 'Cancel', 'Save Draft', and 'Post Article' buttons, and a 'Done' button at the very bottom."/>

Edit HR72 - Mozilla Firefox

http://127.0.0.1:8080/traction/post?proj=Test&type=editentry&origtype=single&curer

Edit HR72

Choose Private Draft / Template... Load Delete

Project Test Style Article

Title Pension Program for Employees

→ ☒ Allow Links to This Article by Name Edit names (1)

Labels Add labels Add relationships Add sections

Attachments (1)  
Pension Progr...  
Edit or Attach more

The pension program is being maintained for Class B employees while we phase all other employees to [HR0: 401K Policy for Employees](#)

The attached powerpoint explains the pension program.

Describe Changes: Simplify HTML

When you edit an article, a number called an Item ID appears in front of each paragraph. This number ensures that paragraph level links, labels, and comments remain associated with the paragraph after editing.

Cancel Save Draft Post Article

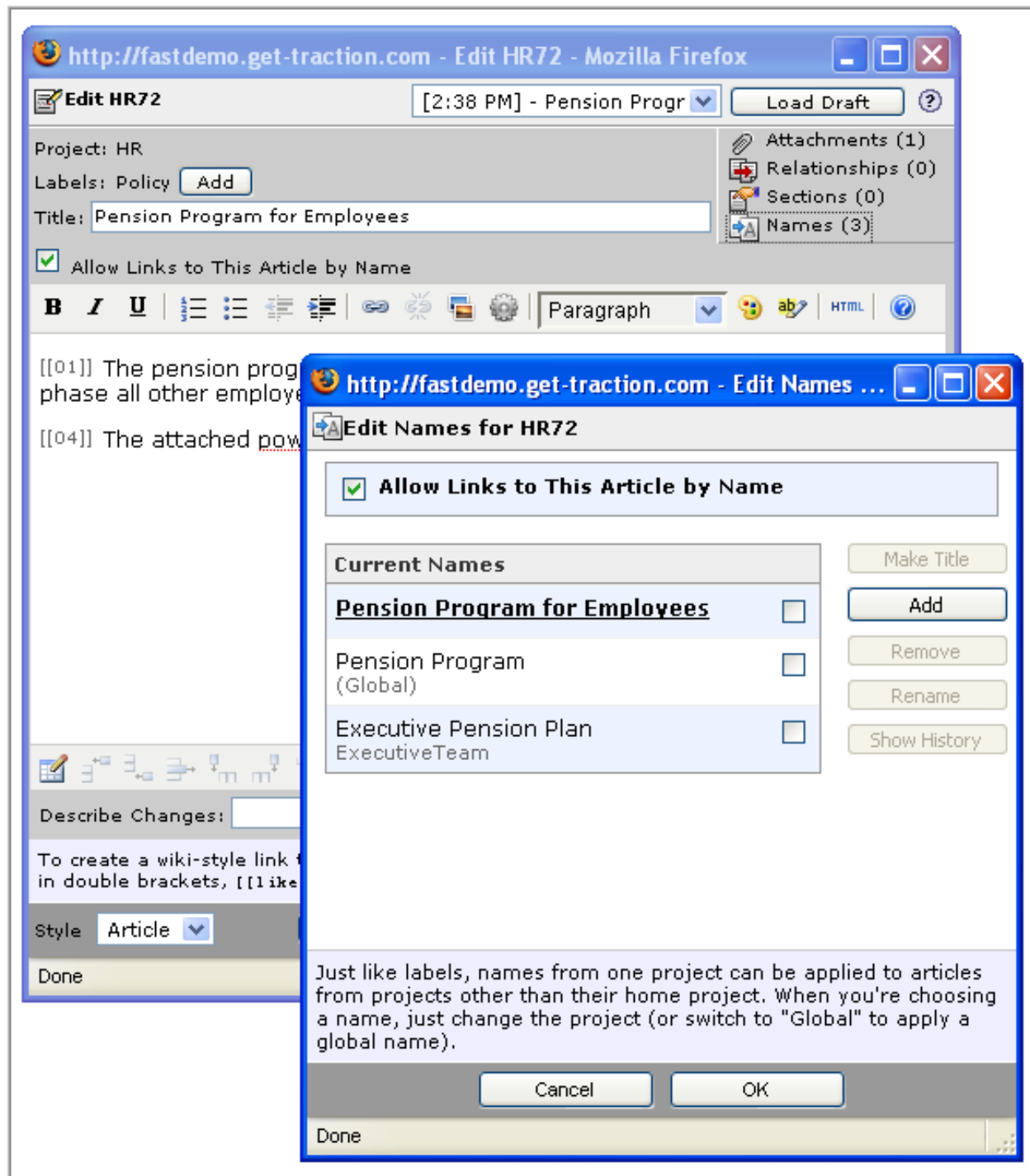
Done

## Assign additional Page Names, from other Wiki Projects or the Global Name Space

The *Add Names* dialog (which changes to *Edit Names* when at least one name exists) allows you to assign several equivalent Names to a given Article. You can assign names from the project where the article is published, from other projects, or even from the Global Name Space.

In the example below, the name *Pension Program for Employees* is the Page Name in the HR project

where the article is published. However, the same content can be referenced by page name *Pension Program* in the Global Name Space and using the name *Executive Pension Plan* in the ExecutiveTeam project.



When posted (see below) this article shows the content and *policy* label followed by a comment form, an attached presentation file, and a list (highlighted) of incoming links and page names assigned to this article.

Note that the incoming link from the article titled *Executive Perks* is using the Page Name Alias assigned from the ExecutiveTeam Project. Because of Traction's security model, Individuals without permission to see the ExecutiveTeam project would not see this incoming link.

Article

History

Pension Program for Employees

Policy

HR72 | October 26, 2006 | 10:51 AM

Posted and Edited by Jordan Frank

1 Attachment

The pension program is being maintained for Class B employees while we phase all other employees to [HR0: 401K Policy for Employees](#)

The attached powerpoint explains the pension program.

Article Comments

Add a Comment on this Article

Cancel

**B** *I* U | | Paragraph ▾ [HTML](#)

Post Comment in the project 

HR ▾

Attachments

1. Example.ppt (10.5 KB) 

Edit

Related Articles

referenced by (2)

ExecutiveTeam959: Executive Perks (via Executive Pension Plan)

HR0: 401K Policy for Employees

references (1)

HR0: 401K Policy for Employees

Similar Articles

Find Similar Articles

Article Names

Executive Pension Plan (ExecutiveTeam)

Pension Program (Global)

Pension Program for Employees

## ***When to Use Global Page Names***

Page names are meta-data which belong to a given project. Therefore, the ability to have knowledge of or use the page names in each project also depends on whether you can read and author in that project.

By contrast, the Global name space is available to all users in all projects. It can be used as a single, most authoritative page name overlay across all projects.

Imagine a case where you created three different articles with the page name Revenue Recognition in each of the Sales, Marketing and Executive Team projects. To make matters more interesting, the Accounting project has 3 different articles posted over 8 years - all titled Revenue Recognition. You may want to assign the Global page name "Revenue Recognition" to the article in the Sales project to call it out as the most authoritative version of the definition.

## ***Page Name History - Fearless Refactoring***

As your wiki changes and grows over time, Pages are renamed, Page Names are moved from Article to Article, New Pages are requested, Page Names are Removed, and some Page Names are orphaned. The content of a single page can be split into multiple pages to make the subject easier to read, or many pages with very similar content may be combined under a more general name - this process is often called *refactoring*. It may happen very gradually, or in big sweeps.

In traditional wiki's it can be very difficult to keep track of what happens when pages are renamed, split or combined - and it often requires a sequence of manual actions to insure that old by-name links point to the right pages after refactoring. Additionally, a user may run into problems when visiting a page titled "Bug," only to discover it is about a car when it used to be about an insect! The Page name Bug may have been dropped and then reassigned - but there is typically no way find out what happened or follow a link trail to the page now named Insect.

Traction's [Audit Trail](#) makes it simple to review page name history as well as typical page content history. It can help users follow a trail to the page they expected (following the trail from Bug to Insect) and it can help "wiki gardeners" monitor and manage an actively evolving wiki.

One example of Traction's audit trail is a unique feature that allows you to display and explore Page Name History. As Page Names are assigned, changed and re-assigned, you can follow the history trail to see what happened.

In the example of the article shown below, you can see the Name history along with the article edit history and label history. The Name history and its timeline show that three names were added to the page.

The example also shows that (at 3:13PM) the name "Pension Program for Employees" was Renamed to "Employee Pension Program." As a result of that change, the Page Name "Pension Program for Employees" is now free to be used elsewhere, and all links to this Article will now show the new Page Name "Employee Pension Program."



Article
History

## History of Employee Pension Program

HR.72 | October 26, 2006 | 10:51 AM  
 Posted and Edited by Jordan Frank  
 1 Attachment

**Edit History** [Compare Selected Versions](#)

	Traction ID	Date	Time	Editor	Description of Changes	Status
<input checked="" type="radio"/>	HR93	Apr 29, 2008	3:13:23 PM EST	Jordan Frank		PUBLISHED
<input checked="" type="radio"/>	HR91	Apr 29, 2008	2:45:30 PM EST	Jordan Frank		PUBLISHED
<input type="radio"/>	HR90	Apr 29, 2008	2:29:56 PM EST	Jordan Frank	<i>small changes</i>	PUBLISHED
<input type="radio"/>	HR83	Sep 4, 2007	2:45:51 PM EST	Jordan Frank		PUBLISHED
<input type="radio"/>	HR.72	Oct 26, 2006	10:51:30 AM EST	Jordan Frank	<i>Original Version</i>	PUBLISHED

### Name History

Traction ID	Date	Time	Editor	Action	Name ID	Linked To	Status
HR93	Apr 29, 2008	3:13:23 PM	Jordan Frank	Pension Program for Employees → Employee Pension Program	95 (HR)	HR.72	PUBLISHED
HR91	Apr 29, 2008	2:45:30 PM	Jordan Frank	+Executive Pension Plan	97 (ExecutiveTeam)	HR.72	PUBLISHED
HR91	Apr 29, 2008	2:45:30 PM	Jordan Frank	+Pension Program	96 (*)	HR.72	PUBLISHED
HR90	Apr 29, 2008	2:29:56 PM	Jordan Frank	+Pension Program for Employees	95 (HR)	HR.72	PUBLISHED

### Label History

Traction ID	Date	Time	Labeler	Action	Item
HR.72	Oct 26, 2006	10:51:30 AM	Jordan Frank	+Policy	HR.72

### Complete History

[Show Reference Map](#)

## Managing and Monitoring your Wiki Named Pages

Wiki and Named Page related sections (see [Sections Overview](#)) in Traction make it easy for any user to see what's going on, and will satisfy the frustrations of any "Wiki Gardener" familiar with the work of monitoring and managing a wiki. The following section types are available to help manage Named Pages and other Wiki activity:

- **Recent Edits:** Monitor article and comment editing. You can even scope this view down to only monitor important pages that, perhaps, are tagged with a *Requirement* label or written by a given author.
- **New Pages:** Lists all articles that have a newly assigned Page Name.
- **Requested Pages:** When users make forward links to pages that don't yet exist, this section lists the requested pages.
- **Renamed Pages:** Lists all articles where the Page Name assigned to it is changed to another Page Name
- **Removed Pages:** Lists Page Names that were assigned to an article, and later removed.
- **Orphaned Pages:** Lists Pages that were a target of at least one Page Name link, but are no longer *linked to* as a result of an edit.

Here's an example with three sections on a Front Page showing new named pages, requested pages and orphaned pages:

NEW WIKI (NAMED) PAGES	REQUESTED WIKI PAGES	ORPHANED PAGE NAMES
<b>Executive Pension Plan</b> HR72   Added by Jordan Frank   April 29, 2008   2:45 PM	<b>Porsche</b>	<b>Boeing</b> Competitor129
<b>Pension Program</b> HR72   Added by Jordan Frank   April 29, 2008   2:45 PM	<b>Infiniti</b>	<b>TiAL</b> WahChang18
<b>Employee Pension Program</b> HR72   Added by Jordan Frank   April 29, 2008   2:29 PM	<b>Toyota</b>	<b>Gamma Titanium</b>
<b>Bug</b> Wiki234   Added by Jordan Frank   April 28, 2008   8:33 AM	<b>jason siegal</b>	<b>Aluminide</b> WahChang18
<b>Volkswagen Bug</b> Wiki230   Added by Jordan Frank   April 28, 2008   8:31 AM	<b>jordan frank</b>	<b>Gamma Titanium</b>
<a href="#">Read More New Wiki (Named) Pages...</a>		<b>Aluminide (TiAl)</b> WahChang18
		<b>Prius</b> Wiki208
		<a href="#">Read More Orphaned Page Names...</a>

## Interaction with the Publish/Draft Moderation Feature

If you have activated Draft/Publish support for [Page and Comment Moderation](#) and you are also using page names, you will be glad to know that the page name model works in conjunction with the moderation model and the permission implications. For example, a forward link from a draft article is shown as a draft link, in grey, within a Requested Page Names section. As a result, if you can't read draft then you can't know that the page name is being requested.

## Linking to Named Pages

Doc603: January 2, 2009 11:45 PM, Posted by Paul Needham, Edited by Christopher Nuzum

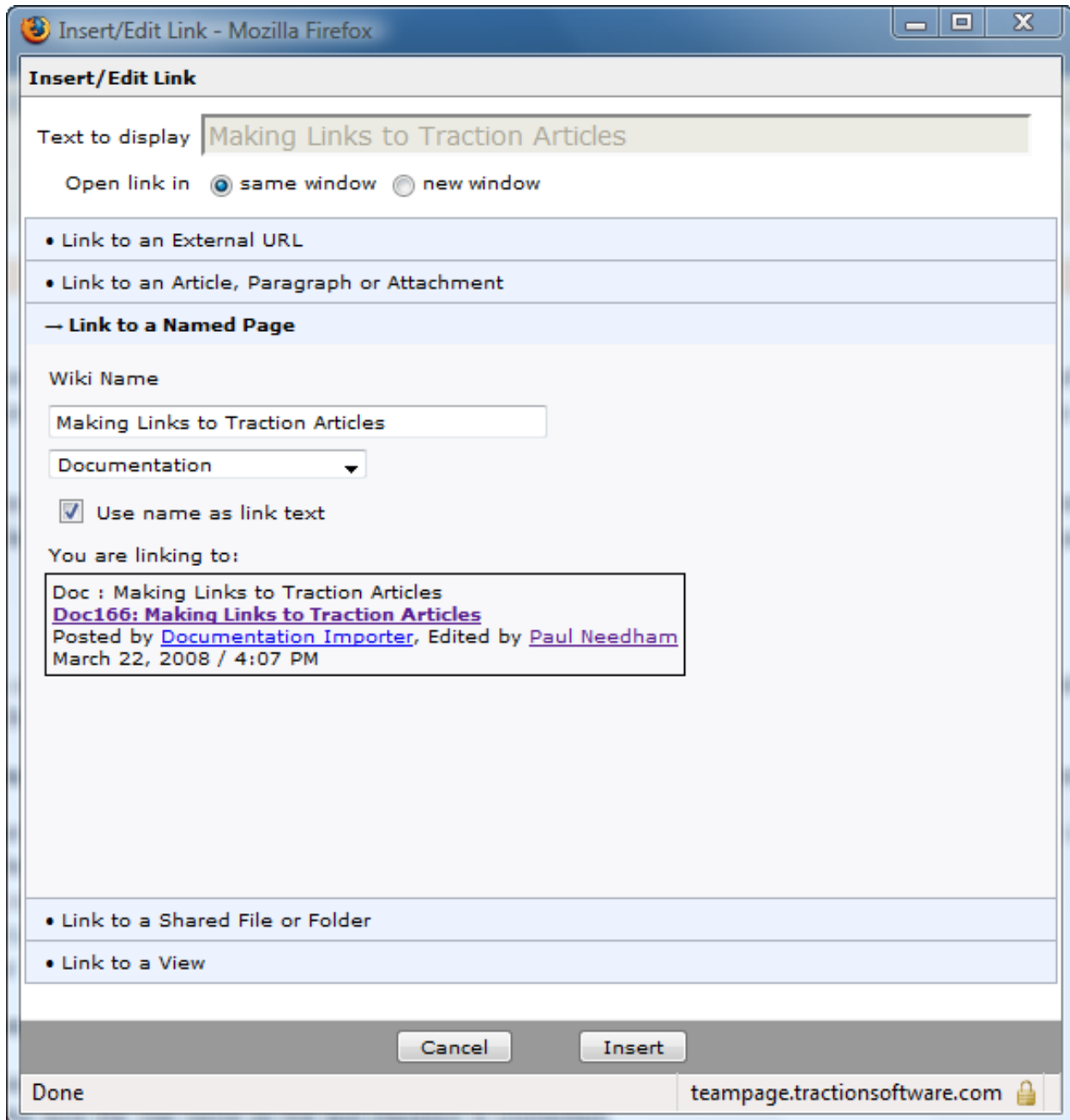
In wiki-style projects, a Traction article is normally linked to using a unique page name assigned to that article, rather than its *Traction ID*. This article provides more detail on the process of linking to *Named Pages* than is covered in [Making Links to Traction Articles](#) and [Making Links with the Link Tool](#).

Once an article has been assigned one or more page names as discribed in [Page Name Management and Name History](#), a link can be established using any of those names. Remember that assigned page names can be either *Global* or specific to a particular project. When linking to a *Named Page*, you will need to specify either the project it was assigned in or that it is *Global*.

You can link with the GUI driven Link Tool or by using wiki syntax. This article covers both cases.

## Linking with the Link Tool

The most straightforward method to create a link from the body of another article is to use the *Link Tool* accessed by clicking the *Insert/Edit Link* icon in the *Article Editor* toolbar.



Depending on what you want to appear as the link text, you should do one of the following:

1) **If you want the "Wiki Page Name" to be the link text**, you should place your cursor where you want the link to be inserted, then

- Click the Insert/Edit Link icon.
- Select *Link to a Named Page* and then make sure that the *Project Selector* is showing either the project that the target page is located in or *Global*, as appropriate.
- When you type any text string into the "Wiki Name" box, Traction will suggest all *Page Names* that

- contain that string.
- You can select from the list or write a new page name.
- Make sure the *Use name as link text* checkbox is checked and click the *Insert* button.
- The link will be inserted at the cursor point.

## 2) If you want the link text to be different from the "Wiki Name,"

- Follow the steps in 1) above, being sure the *Use name as link text* checkbox is unchecked.
- Write the text for the link in the "Text to Display" dialog at the top of the form before submitting.

or

- In the article editor, type the text you want to display as the link
- Highlight the link text
- Follow the steps in 1) above, being sure the *Use name as link text* checkbox is unchecked.
- Write the text for the link in the "Text to Display" dialog at the top of the form.

## Linking with Wiki Syntax

Experienced wiki users often prefer the convenience of using wiki markup rather than the Link Tool.

### Linking to a Named Page in the Same Project

Most of the time, you will link to a named page in the same project as the article or comment you are working on. If you want to link to an article with the page name *Revenue Recognition*, simply surround the page name in double square brackets:

```
"[[Revenue Recognition]]"
```

### Linking to a Named Page in a Different Project

You may want to link to a named page that is in a different project. The approach is the same but you have to qualify which project, Accounting, you are linking to:

```
"[[Accounting:Revenue Recognition]]"
```

### Linking to a Global Page Name

Traction's naming model (see [Page Name Management and Name History](#)) includes the capability to assign page names from a Global name space. To link to a page name alias in the global name space, use a \* instead of a project name:

```
"[[*:Revenue Recognition]]"
```

## Links to New Page Names

One of the advantages of using Page Name is that you can link to a page that doesn't exist yet.

Links to new pages in red with a dotted underline. When users with author permissions click on the link, Traction will display a page asking if they wish to create the article with the requested page name. For context, the page will show what articles are requesting it.

## Editing links with the Link Tool

When you click to edit an article in which you've made links with the link tool, links will show in red (for links to pages that don't exist) or blue (for all other links).

Place your cursor anywhere on an existing link and click on the *Insert/Edit Link* icon in the toolbar. The *Link Tool* with the existing settings loaded. You can make changes as desired then save them clicking the *Insert* button.

When you click to edit an article in which you've made links with wiki markup, the actual syntax you used will appear (rather than a [red](#) or [blue link](#)). If the targeted page name had been changed, Traction will actually render the changed (not the original) text.

---

## **Page and Comment Moderation**

Doc516: December 26, 2008 2:50 PM, Posted and Edited by Paul Needham

The Traction TeamPage moderation model allows for collaborative or formally controlled approval of page edits and comments, as well as new content. With TeamPage, moderation users who can read "drafts" in any number of blog/wiki workspaces can view, navigate and search the entire system based on its draft state or based on the "latest stable" published state.

*Note: The Add New Article Form has a Save Draft / Load Draft feature (see [Add New Article](#)) which is not related to publish/draft moderation. That feature auto-saves content in your editor as you work on articles or comments. Those drafts are "local" to the user and not visible to anyone else.*

Permission settings per project workspace grant rights to read, edit, reject or publish drafts to any individual or group. With draft and publish permissions widely granted, this model supports wiki style collaborative editing while keeping the "latest stable" state available for reference until consensus is achieved.

With publish permission closely held, this supports open collaboration followed by formal review and approval of important wiki content - such as changes to a contract or approved HR policy.

## **Enabling Moderation**

Moderation permissions and features are not active until a project administrator has clicked to activate [Support for Published/Draft Articles \(Activate Draft/Moderation Support\)](#)

## **Permissions for Publishing, Editing and Reading Drafts - Locking Too**

The spirit of Wiki is for open contribution, but even the public Wikipedia limits editing of some pages. Traction TeamPage supports multiple project spaces and makes it simple to state the rules for creating, editing and moderating content in each space using Permissions that grant or deny rights to perform specific actions on content within that space. A project administrator can grant or deny rights within a project space to individuals or groups - including groups defined as roles in an external LDAP or Active Directory server.

Traction's permissions provide the flexibility to support whatever moderation model you want to use. Per project space permissions include:

- **Author or Comment:** Controls who can create new articles or comments within a project space
- **Edit:** Permission to edit any article or comment
- **Edit Own:** Permission to edit only those articles or comments you created
- **Read Own Articles:** Permission to read your own published and draft articles
- **Read Published:** Permission to read published content
- **Read Draft:** Permission to read draft content
- **Read Edit History:** Permission to see edit history (includes draft edits if you have Read Draft)
- **Publish:** Controls who can publish draft content within a project space

- **Publish Own:** Permission to publish only those articles or comments you created
- **Lock and Unlock:** Permission to lock and unlock, or edit locked content

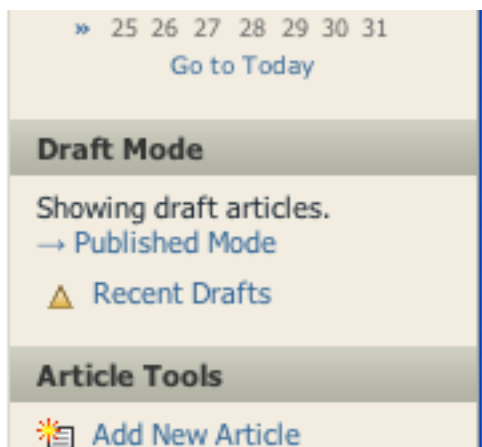
The set of permissions give you all kinds of flexibility. For example, allowing a user to Read Own, Read Published, Comment, Edit Own and Publish Own will allow that person to add comments but not articles as well as edit toggle the publish status of their own comments. Simply removing their Publish Own permission will mean they can add comments that will be moderated. Meanwhile, they will be able to see their draft comments but not see any of the other draft content.

## ***Moderating Draft Articles and Comments***

Users who have "Publish" or "Publish Own" permission can publish every edit with one click. For others, all new entries and edits will automatically appear as Draft versions.

Users with Publish permission can click one button to publish any draft content as they read, or browse through an automatically maintained chronology view of Drafts pending approval.

When in Draft Mode, titles of Draft articles and comments are shown in Grey, and you can easily flip between the current Published version, current Draft version and Edit History. In the default Mexico skin, the Published/Draft Mode toggle is below the date range selector:




If you toggle to Published mode, the section content and label counts will not reflect the impact of the draft content. However, in a single article view, you may see pending comments and a tab that lets you click to the Draft Version of an article.

In the example below, there are simple controls to Publish or Reject a Draft version. You can also Unpublish or Reject currently published versions.




Published Version
**Draft Version**
History

**DRAFT** This article is pending approval.

 Publish
 Reject
 Compare to Published Version

## Health Care Policy

HR94 | April 29, 2008 | 4:04 PM  
Posted and Edited by Jordan Frank  
 2 Comments

Health Policy

The standard policy covers employees for basic health care requirements, not including dental.

The company pays 50% of the premium and employees pay the other 50%. The employee share is taken out before taxes.

Dental Coverage is not provided by default, although you may elect to add a dental plan at your own cost.

**Common Questions:**

- Is my family covered?

You can extend the plan to cover your family for \$500 per month.  
Jordan Frank / HR97 / April 29, 2008 / 4:05 PM

- Are chiropractic visits covered?

**DRAFT** This comment is pending approval.  
This comment cannot be published until the article [HR94](#) is published.
 Reject

Up to 10 Chiropractic visits per year are covered by the plan. These types of visits are subject to a \$20 co-pay.  
Jordan Frank / HR99 / May 2, 2008 / 11:13 AM

- When does coverage kick in?

Once an article version is published, then any pending Draft comments may also be published.

### ***Moderation History and Edit History***

Curious about how this article has evolved over time? If you are interested and have permission to read the history, you can easily dive into the details. Reading through the trail below, you can see:

- **Edit History:** Version 94 is currently *Published* and all other versions are marked as *Draft*
- **Name History:** The [Page Names](#) "Health Policy" and "Health Care Policy" have been added to the Draft version of the article.

- **Moderation History:** Version 95 was the first Published version, but it was later Unpublished and the Previous Version 94 was Published
- **Label History:** The original version of the article was tagged "Policy" and then it was tagged "Health" a few days later.

[Published Version](#)
[Draft Version](#)
[History](#)

## History of Health Care Policy

HR94 | April 29, 2008 | 4:04 PM  
 Posted and Edited by Jordan Frank  
 2 Comments

[Edit History](#)
[Compare Selected Versions](#)

Traction ID	Date	Time	Editor	Description of Changes	Status
<input checked="" type="radio"/> HR104	May 2, 2008	11:26:47 AM EST	Jordan Frank		DRAFT
<input checked="" type="radio"/> HR103	May 2, 2008	11:24:43 AM EST	Jordan Frank	Added Health Policy and Health Care Policy Page Names	DRAFT
<input type="radio"/> HR98	May 2, 2008	11:12:09 AM EST	Jordan Frank		DRAFT
<input type="radio"/> HR95	Apr 29, 2008	4:04:57 PM EST	Jordan Frank	Added paragraph about company paying 50%	DRAFT
<input type="radio"/> HR94	Apr 29, 2008	4:04:28 PM EST	Jordan Frank	Original Version	PUBLISHED

### Name History

Traction ID	Date	Time	Editor	Action	Name ID	Linked To	Status
HR104	May 2, 2008	11:26:47 AM	Jordan Frank	+Health Policy	101 (HR)	HR94	DRAFT
HR103	May 2, 2008	11:24:43 AM	Jordan Frank	+Health Care Policy	100 (HR)	HR94	DRAFT

### Moderation History

Traction ID	Date	Time	Moderator	Action	Version
HR102	May 2, 2008	11:19:21 AM	Jordan Frank	Published	HR94
HR100	May 2, 2008	11:17:11 AM	Jordan Frank	Unpublished	HR95
HR96	Apr 29, 2008	4:05:05 PM	Jordan Frank	Published	HR95

### Label History

Traction ID	Date	Time	Labeler	Action	Item
HR101	May 2, 2008	11:17:51 AM	Jordan Frank	+Health	HR94
HR94	Apr 29, 2008	4:04:28 PM	Jordan Frank	+Policy	HR94

### Complete History

[Show Reference Map](#)

From this History view you can look at specific versions and you can then Publish, Unpublish or Reject that version.

In this view, you can see the chronology of selected aspect of the history (edits, names, moderation, labels). If you want to see a merged view of the history (including other types of [Audit Trail](#) information), you can click on the Show Reference Map link to learn more about how this article and the context around it has evolved. The map also interleaves references to when comments were made and when this article was emailed.

### **"Latest Stable" and Work in Progress Views**

Traction Release 4.0's collection of features makes work-in-progress collaboration easy while keeping the "latest stable" version visible for reference. People who have "Read Drafts" permission can work in a *Draft* mode which shows the latest working version of content across the TeamPage server - or flip to a *Published* mode to show the latest stable (published) view of all content.

This makes it simple for people with Draft permission to work collaboratively on new versions of content across one or many project spaces without disturbing people who prefer (or are limited to) the latest stable version of content.

For example, during the often-knotty process of refactoring a wiki - which may require performing a set of related edits over many pages - authors can collaborate on changes for days or longer without disturbing the "latest stable" view of the wiki. Page changes can be published later, when all the pages are ready - or have been reviewed and approved.

The moderation model is seamlessly combined with the TeamPage 4.0 page name and page history model to support "fearless refactoring" of the names, links and content of a set of draft wiki pages prior to publication of that set of pages as the "latest stable" version.

Access to the moderation history is also controlled by the per workspace permissions granted to individuals or groups. This makes it possible for members of the groups participating in draft discussions to see all of the draft history, discussion and content of any draft version, while groups who are not party to the draft discussion can only see the history and content of published versions. This makes it possible to support a "What happens in Vegas stays in Vegas" rule to enable lively internal discussion and wiki style collaboration to establish a consensus (spanning many wiki pages if necessary) and use of attributed comments rather than draft edits for published content that represents an important stable consensus – or a legally binding agreement.

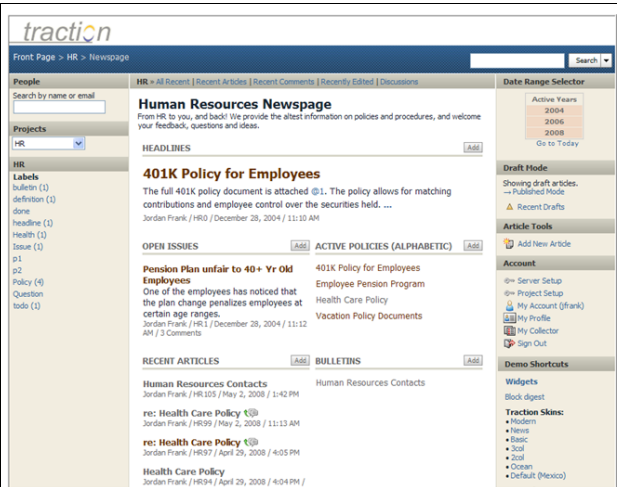
### **Project Newspaper View - Draft vs. Published**

See below for sample screenshots of a *HR Project* Newspaper in *Draft* and *Published* Modes. Content and label counts (tag cloud) change when toggling between modes.

## Draft Mode - HR Newspage

Grey titles indicate draft content

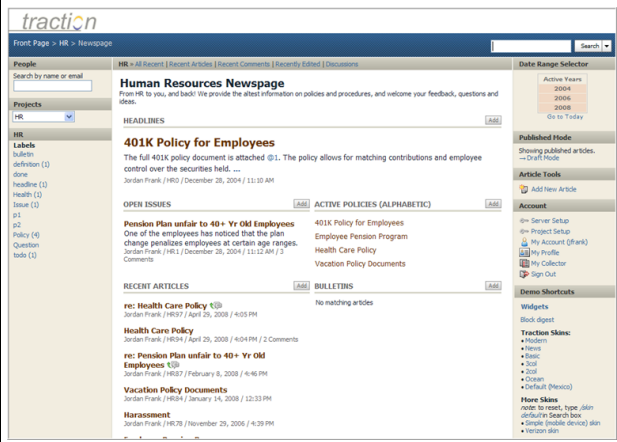
Bulletin (count 1) label appears.



## Published Mode - HR Newspage

Grey titles disappear or revert to brown, if there is a Published version.

Bulletin label shows no content.



## Search Results View - Drafts vs. Published Entries

Search results (TeamPage FAST Search Module style results shown here) also can present Draft content, Published content - or both. By default, people who can read both Draft and Published content see search results that include the most recent Published results as well as any more recent versions that are still Drafts. Note, In the example below, there are two hits for the same article - the draft version and the published version.

traction

Front Page > All Projects > FAST Search

Keywords

95 more >

health care (0.16)  
care policy (0.14)  
re (0.12)  
bbc news (0.10)  
jordan frank (0.08)

Companies

1 more >

Alcoa (1)  
Comcast (1)  
Consumers Union of U.S., Inc (1)  
TR (1)  
Verizon (1)

Projects

4 more >

MarketResearch (9)  
HR (4)  
Alcoa (3)  
PharmaReview (3)  
NASA (2)

Labels

26 more >

:MarketResearch:competition (3)  
:MarketResearch:collaboration (3)  
:MarketResearch:products (2)  
:HR:Policy (2)  
:Competitor:SWOT:weakness (2)

Types

>

Article (14)  
Attachment (8)  
Comment (5)

Authors

>

Jordan Frank (18)  
Guest (3)  
Visitor (2)  
-101 (2)  
admin (2)

Names

4 more >

Mitch Waldrop (2)  
Chris Rose (1)  
David Everitt (1)  
Gwen Ifill (1)  
Jeremy Bloxham (1)

All Projects > All Recent | Recent Articles | Recent Comments | Recently Edited | Discussions

By Rank | Newest First | Oldest First • Any Words | All Words | Exact Phrase

Show Snippets

fast Search

Type a few search terms or just click the search button to browse

health care

Search

Search Preferences

FAST Setup

Projects

Limit results by project

Edit All Projects

More Controls

Did you mean: "health care"

Showing 1-25 of 27 hits in 0.046 seconds

Searched for: health care

Health Care Policy

HR94 | April 29, 2008 | 4:04 PM | Posted by Jordan Frank | Similar results

The standard policy covers employees for basic **health care** requirements, not including dental. The company pays 50% of the premium and employees pay the other 50%. The employee share is...

re: Health Care Policy

HR99 | May 2, 2008 | 11:13 AM | Posted by Jordan Frank | Similar results

Up to 10 Chiropractic visits per year are covered by the plan. These types of visits are subject to a \$20 co-pay.

re: Health Care Policy

HR97 | April 29, 2008 | 4:05 PM | Posted by Jordan Frank | Similar results

You can extend the plan to cover your family for \$500 per month.

Health Care Policy

HR94 | April 29, 2008 | 4:04 PM | Posted by Jordan Frank | Similar results

The standard policy covers employees for basic **health care** requirements. The company pays 50% of the premium and employees pay the other 50%. The employee share is taken out before taxes...

G8188.pdf (279.2 KB)

FastIDEA14 @1 | Last Modified May 3, 2007 | 9:05 AM | by Visitor | Similar results

...providing hospital-type **care**; • prescription by some...characteristics which is useful for **health** education, to the exclusion...the Minister of Public **Health** - a double red line which...followed in institutions/**health care** centers with adequate facilities...

BBC News | Health | Taking the roar out of snoring

Restoratives26 | March 22, 2007 | 12:40 PM | Posted by Jordan Frank | 1 Attachment | Similar results

A device fitted over the teeth could help snorers Snorers and their partners can look forward to a good night's sleep, thanks to a device that reduces the noise of snoring by more than a half. The device, developed by a team of doctors and dentists from Glasgow, fits easily over the teeth.

Squirrels are having health issues

PharmaReview71 | September 11, 2007 | 8:00 AM | Posted by Jordan Frank | Similar results

Draft Mode

Showing draft articles. → Published Mode

Recent Drafts

Article Tools

Add New Article

Export

Print Version

Email Articles

Export Articles

Page Tools

Collect Articles

Change Labels

Erase Articles

Account

Server Setup

Project Setup

My Account (jfrank)

My Profile

My Collector

Sign Out

Demo Shortcuts

Widgets

Block digest

Traction Skins

Modern

News

Basic

3col

2col

Ocean

Default (Mexico)

More Skins

note: to reset, type /skin default in Search box

Simple (mobile device) skin

Verizon skin

Public Customer/Partner Traction Sites

IIIS Institute

Traction Software Inc

Adhena AG

## Managing and Monitoring Your Draft Moderation and Publishing Activity

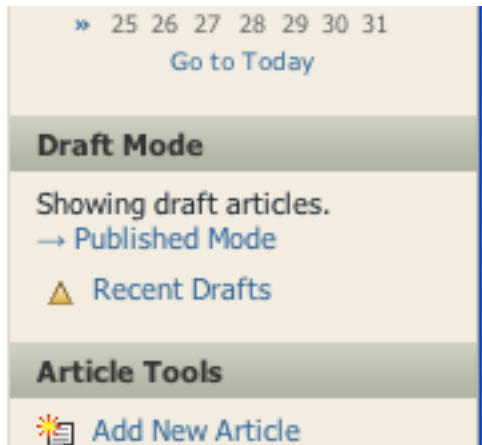
Sections can help you manage and display information and meet a variety of use case needs (see [Sections Overview](#) for more information). Sections related to moderation include:

- Recently Published
- Recently Rejected
- Recently Locked
- Recently Unlocked

You can also filter other sections by whether articles or comments are in Draft, Published, Rejected, Locked and Unlocked state.

To Monitor Drafts, you might use the Recent Drafts link to see content ordered by when it was made a draft:

Page 215 of 220



or you might use the Recent Articles section but filter it to Drafts (screening out Published and Rejected entries - as was done in the image below. The 2nd section in the image below shows articles based on when they were toggled to Published (though they are, coincidentally also showing in reverse chron based on the date they were posted)

RECENT DRAFTS	RECENTLY PUBLISHED
<b>Human Resources Contacts</b> Jordan Frank / HR105 / May 2, 2008 / 1:42 PM	<b>Nissan</b> admin / MarketResearch2812 / May 1, 2008 / 9:50 AM
<b>re: Health Care Policy</b> Jordan Frank / HR99 / May 2, 2008 / 11:13 AM	<b>Creating a forward link</b> admin / MarketResearch2811 / May 1, 2008 / 9:49 AM
<b>Health Care Policy</b> Jordan Frank / HR94 / April 29, 2008 / 4:04 PM / 2 Comments	<b>Shared links</b> admin / MarketResearch2810 / April 30, 2008 / 2:36 PM
<b>Corvette Racing Car</b> Posted by Jordan Frank, Edited by Jason Siegal / Wiki164 / February 26, 2008 / 10:33 AM / 1 Comment	<b>re: Trip Report: Welsh Supply Co, 6/21/2005</b> admin / ExecutiveTeam984 / April 30, 2008 / 2:24 PM
<b>re: Q2 Results for ABC Corp</b> Jordan Frank / Wiki162 / February 26, 2008 / 10:17 AM	<b>I am at training with CDRH</b> admin / MarketResearch2809 / April 30, 2008 / 1:16 PM

## Advanced Moderation Techniques

Doc612: January 4, 2009 12:37 PM, Posted and Edited by Paul Needham

As discussed in [Page Name Management and Name History](#) and [Page and Comment Moderation](#), TeamPage provides a powerful set of tools for creating wiki-style online documentation. Page and comment moderation can also be used independently from using named pages. This article provides hints and techniques that will help users more effectively use these capabilities.

### Using Read Published, Read Draft, Author, Edit and Publish Permissions

By assigning *Read Published Articles*, *Read Draft Articles*, *Author*, *Edit Articles*, *Publish Articles*, etc. permissions to various accounts, in combination with use of various project settings, you can support a variety of documentation access and workflow requirements. For example, you can create the following



conditions:

### **Selected users only see published content**

In this case, you would not give these accounts *Read Draft Articles*, *Author*, *Edit Articles* or *Publish Articles* permissions, only *Read Published Articles* permissions. (If making the documentation project accessible without using a login account, this would apply to the Visitor account.) Since the users do not have *Read Draft Articles* permissions, they will only see the published versions of pages, even when draft versions exist. They will also be able to see and click on links to:

- 1) pages for which only a draft version exists, in which case they will receive a message that a draft version exists, but they do not have the rights required to view it
- 2) pages for which the name has been created, but the page does not yet exist, in which case they will receive a message that the page does not exist and they do not have the rights needed to create it

### **Only selected users can publish content**

In this case, you give *Publish Articles* permissions only to the "publisher/editor" accounts and not to the accounts of users tasked with creating draft versions. Thus, you will have:

- 1) Authors, with both *Author* and *Read Draft Articles* permissions. Depending on workflow, these accounts will at least have *Edit Own Articles* permissions and frequently have *Edit Articles* permissions.
- 2) Publishers, with both *Read Draft Articles* and *Publish Articles* permissions. Depending on workflow, these accounts may also have *Edit Articles* and *Author* permissions.
- 3) Publishers, or a subset of this group, can be given *Lock/Unlock Articles* permissions so they can prevent or allow the creation of a new draft version of an article.

This scenario can be further refined by using the project setting that determines whether an account with *Publish Articles* permissions has the *Article Editor* set to publish articles by default when they are posted.

### **Using Moderation Projects**

When comments are posted directly in a documentation project, Traction will automatically manage the visibility of comments made on draft articles. These comments will be visible only to accounts with *Read Draft* permissions as long as the article they are commenting on has not been published. However, as soon as the article is published, these comments will become visible to all accounts with *Read* permissions for the documentation project. Likewise, comments made on articles that are in a published state will be visible to accounts with *Read* permissions.

Therefore, in the case of a documentation project which is intended for readers who should only see published pages, it is frequently useful to use a *Moderation Project* as the project where comments on articles/pages in the documentation project are posted. The main advantage of using a *Moderation Project* is that the visibility of the comments posted to it will then be tied to the *Read* permissions granted for that project, rather than the *Read* permissions for the documentation project itself. When using a *Moderation Project*, the project administrator for the documentation project can require that all comments on the documentation project be posted only to the designated *Moderation Project* or that the *Moderation Project* be the default project for comments, but users can choose to post comments to any other project where they have *Author* permissions.

When using a *Moderation Project*, it may also be useful to:

- 1) Apply labels from the *Moderation Project* to articles and individual paragraphs in the documentation project, so that they are not visible to accounts that do not have *Read* permissions for the *Moderation*

*Project.* See **Using Labels to Help Manage Updates** below for some ways you might want to use labels in conjunction with moderated publishing.

2) Locate sections for managing moderated publishing and named pages in the *Moderation Project*, rather than in the documentation project itself.

**Tip:** *It is also possible to have users post their comments on pages in a documentation project to projects that only their team/company has Read permissions for. This essentially creates "private" comments that only members of that team/company see when looking at the documentation project.*

## Using Sections to Help Manage Page Moderation and Named Pages

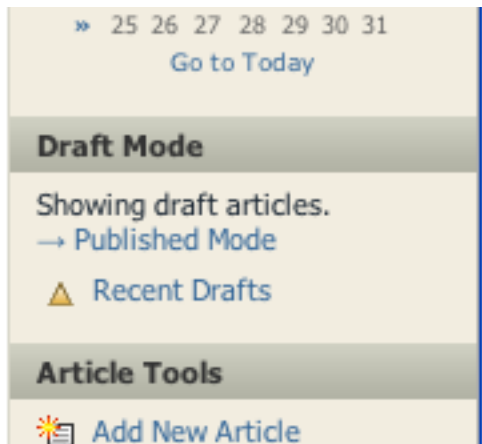
As discussed in areas on specialized sections in [Page Name Management](#) and [Page and Comment Moderation](#), TeamPage allows sections to be configured specifically for the purpose of helping manage moderated publishing and use of named pages. When working on any sizable set of pages, creating and using these sections will prove indispensable.

These sections can be placed wherever sections can be used, such as in project newspages, in Profile pages or even in articles. Since it is generally not desirable to expose these sections to readers of a documentation project, you may not want to place sections that list published pages, etc. on the newspaper of that project. However, you can:

1) Place sections that list articles only visible to users with *Read Draft Articles* permissions on a a documentation project newspaper. Simply set the section option *Show Section Title* to *Only if Section has Content*. Since there will be no matching articles/pages when the newspaper is viewed by someone without *Read Draft Articles* permissions, the section will not show at all.

2) Place the sections on the newspaper of another project, such as the designated *Moderation Project*. In fact, if you have multiple documentation projects, you can consolidate sections for managing page moderation and named pages on the same newspaper or Profile page.

*Note: when using a section that shows pages in a draft state, draft pages will only show up in the section when the project containing the pages is set to Draft Mode (e.g. a section set to show only draft pages will be empty if viewing the project in Published Mode).*



## Using Labels to Help Manage Documentation Updates, etc.

Wiki-style documentation projects generally are organized by creating sets of pages linked by page names, rather than by using labels to categorize articles and group them into sections. However, you can

also apply labels to articles, paragraphs and comments as an organizational technique to help manage such things as marking pages for revision, assigning tasks, tracking completion status, asking questions, etc.

For instance, the following techniques were used in a revision cycle for the Traction TeamPage online documentation you are reading. For this revision cycle, an outside contractor created draft pages, which were then reviewed, edited and published by Traction Software staff.

*Note: As described above, a Moderation Project was used in order to keep all labels and comments involved in the revision process from being visible to people viewing the online documentation in its published state.*

- A label in the form "r41" was applied to pages that needed updating based on new capabilities and other changes made in a new enhancement release of the TeamPage software.
- A "to do" label was applied in conjunction with that label to flag that the page had not yet been updated.
- A section was created to list those pages to be updated (filtering for the "r41" and "to do" labels)
- Another section was created to list pages in a draft state where the "to do" label had been changed to "done." This provided a list of pages ready to review, edit if needed and then publish.
- From that point forward, users with *Read Published* rights to the *Moderation Project*, are able to see immediately by looking at the labels whether a page they are looking at in the Documentation project has been updated for that release (it will have the "r41" and "done" labels).
- Labels were also used to indicate specific images in articles that a) needed to be replaced immediately or b) are slightly out-of-date, but didn't need immediate replacement
- Labels were applied to comments made to the *Moderation Project* to indicate whether they required action by Traction Software or by the outside contractor
- Sections were created to list Traction Software open "to do" items and contractor open "to do" items

In this case, the newpage of the *Moderation Project* for the Traction Documentation project ends up looking like this:

## BULLETINS

Add

Documentation Style Guide and Conventions  
Traction Documentation Feedback and Update Process

## CMS TASKS


Add

### re: Displaying Images

This article is broken: the RS syntax is not shown.

to do  
CMS 

Paul Needham / DocFeedback338 / March 1, 2009 / 1:07 PM

 Vote for This! / Score: 0

### re: Add New Article

to do  
CMS 

The RS insert image syntax is not showing in the body. Fix this.

Paul Needham / DocFeedback336 / March 1, 2009 / 1:03 PM

 Vote for This! / Score: 0

[Read More CMS Tasks...](#)

## REQUESTED PAGES

Using FAST Searches in Sections  
Eligible for Inclusion in the Digest  
Project Status

[Read More Requested Pages...](#)

## TSI TASKS


Add

### re: Using the Document Management Interface (DMI)

to do  
TSI 

You should insert exactly which permission gives the right to delete a file or folder. I am assuming it is Modify Share Folder.

Paul Needham / DocFeedback292 / February 2, 2009 / 1:34 AM

 Vote for This! / Score: 0

[Read More TSI Tasks...](#)

## ARTICLES TO-DO

Add

Add New Article  
Adding and Editing Attachments  
Advanced Moderation Techniques  
Automatically Saved Drafts  
Displaying Images  
Edit an Article  
Email an Article to Traction  
Email Digest  
Embedding Sections in Articles  
Introduction to the Traction User Guide  
[Read More Articles To-Do...](#)

## ORPHANED PAGES

Frontpage Sections  
Subscription Queries  
Using HTTPS with Traction  
[Read More Orphaned Pages...](#)

## RECENT ARTICLES DONE - DRAFT

File Locking  
MIME type information  
Email Notifications  
Filter Notifications by Event Type  
Digest Sections  
[Read More Recent Articles Done - Draft...](#)

## Using Email Notifications to Speed Interaction

When more than one person is working in a moderated publishing mode, setting up email notifications for changes made to articles/pages in a project can significantly speed up interaction. For instance, a person responsible for publishing articles can be set to receive an email notification when a draft article has the label changed from "to do" to "done." See [Email Notifications](#) for more information.