

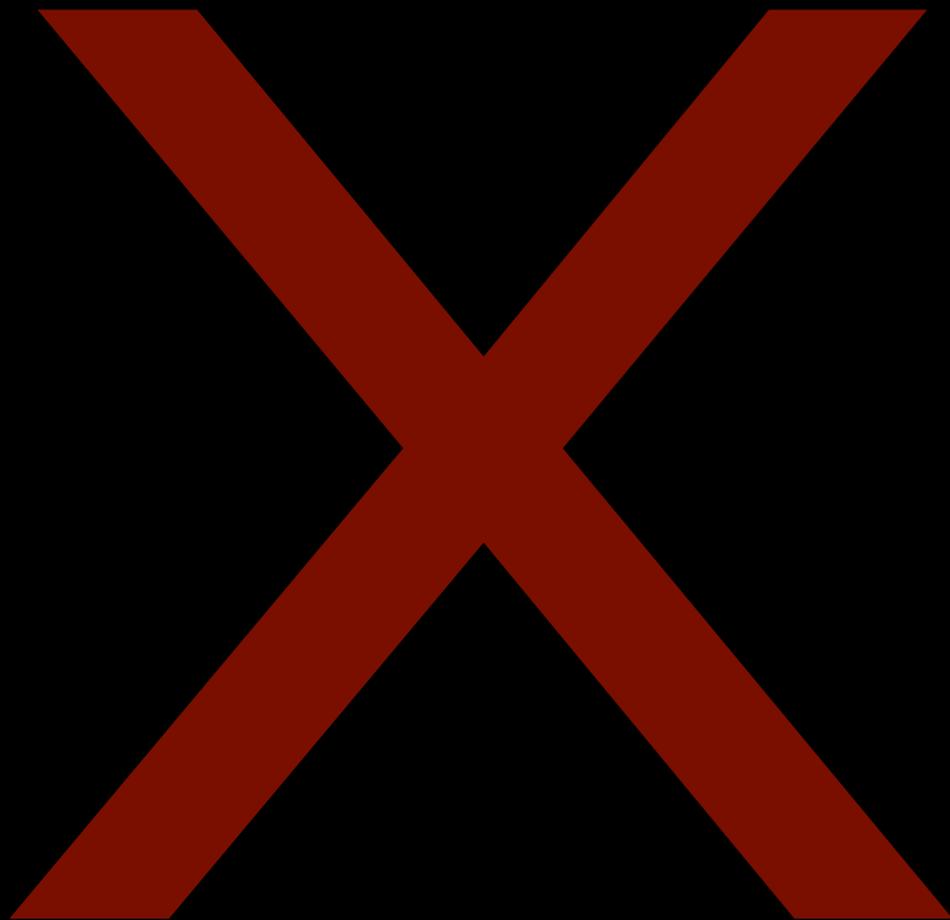
From Mexico to Proteus

A change of interface and a change of lifestyle - How to prepare for your upgrade from TeamPage 4.x to TeamPage 5.x and Attivio 2.2

Traction User Group 2010 (updated April 13, 2011)

Jordan Frank & Chris Nuzum

No Nos



- **FAST Search Module**
- **Attivio 1.0 Search Module**
- **IE6 - Reverts to Mexico**
- **Ratings - not supported yet in 5.x**
- **Navlinks - not supported yet in 5.x**
- **Sub-sections**
- **Liveblog Interface**
- **“On this page”**
- **Mexico Default / Proteus space override**
- **Make Sections from URL**
- **32 Bit Server Operating System (64 Bit recommended)**

New Terms

The screenshot shows a web application interface for 'TUG Planning'. The breadcrumb trail is 'Home > TUG Planning > TUG Planning Tasks Overview'. The main navigation bar includes 'Dashboard', 'Status', 'Activity', 'Wiki', 'Tags', 'Tasks' (selected), 'Calendar', and 'Documents'. Below this, there are sub-tabs for 'Overview', 'Milestones', and 'Projects'. The main content area is titled 'TUG Planning Tasks Overview' and features a search bar with an 'Add Task' button. Below the search bar, there are dropdown menus for 'Space TUG Planning > Project' and 'Milestone'. The tasks are organized into two sections: 'Overdue' and 'Due Today'. Each task entry includes a checkbox, the task name, the milestone it belongs to, a due date, and the assignee's name.

Task	Milestone	Due Date	Assignee
<input type="checkbox"/> Make / Print Agendas & Handouts		10/8/10	Greg Lloyd
<input type="checkbox"/> Slides for Profiles Talk	Milestone TUG 2010 Day 2	10/11/10	Christopher Nuzum
<input type="checkbox"/> Slides for PM Talk	Milestone TUG 2010 Day 2	10/14/10	Christopher Nuzum
<input type="checkbox"/> Slides for Status Updates talk	Milestone TUG 2010 Day 2	10/14/10	Christopher Nuzum

- Project --> Space
- Label --> Tag
- Project Management adds: Project, Milestone, Task

Tasks not = To Do

Home > Jordan Frank > Jordan Frank Tasks Overview

Jordan Frank

Dashboard | Status | Activity | Wiki | Tags | **Tasks** | Calendar | Documents

Overview | Milestones | Projects

Jordan Frank Tasks Overview

Space **Jordan Frank** > Project [] > Miles []

Overdue

- Scan Workshop / Event List - Look for Panels to Join
Project Prep for KMWorld 2010

Next 7 Days

- Make Banner Ad for KMWorld Site
Project Prep for KMWorld 2010

Next 30 Days

- Give Away (or use) 2 Free Conference Passes
Project Prep for KMWorld 2010
- Make / Print Banner for Stand Up Display
Project Prep for KMWorld 2010
- Figure out Monitor (Jordan's or Kellen's)
Project Prep for KMWorld 2010

Recent Jfrank To-Do

- re: Jordan - Bill White saw your Sales10477 and ...
Jordan Frank | Sales10483 | Sep 28, 2010 | 4:55 PM | 1 Comment
- Make / Print Banner for Stand Up Display
Jordan Frank | JFrank1852 | Sep 24, 2010 | 1:36 AM
- Give Away (or use) 2 Free Conference Passes
Jordan Frank | JFrank1848 | Sep 24, 2010 | 1:33 AM
- Make Banner Ad for KMWorld Site
Jordan Frank | JFrank1842 | Sep 24, 2010 | 1:29 AM | 1 Comment
- Scan Workshop / Event List - Look for Panels to Join
Jordan Frank | JFrank1834 | Sep 24, 2010 | 1:17 AM
- Figure out Monitor (Jordan's or Kellen's)
Jordan Frank | JFrank1832 | Sep 24, 2010 | 1:16 AM
- Prep for KMWorld 2010
Jordan Frank | JFrank1825 | Sep 24, 2010 | 1:13 AM | 2 Attachments
- re: E2.0 West 2010 Santa Clara - November 8-11 2010
Jordan Frank | JFrank1822 | Sep 23, 2010 | 11:54 PM | 3 Comments
- E20 mailer promo / for opt-in list
Jordan Frank | Marketing13008 | Sep 15, 2010 | 1:19 PM | 4 Attachments

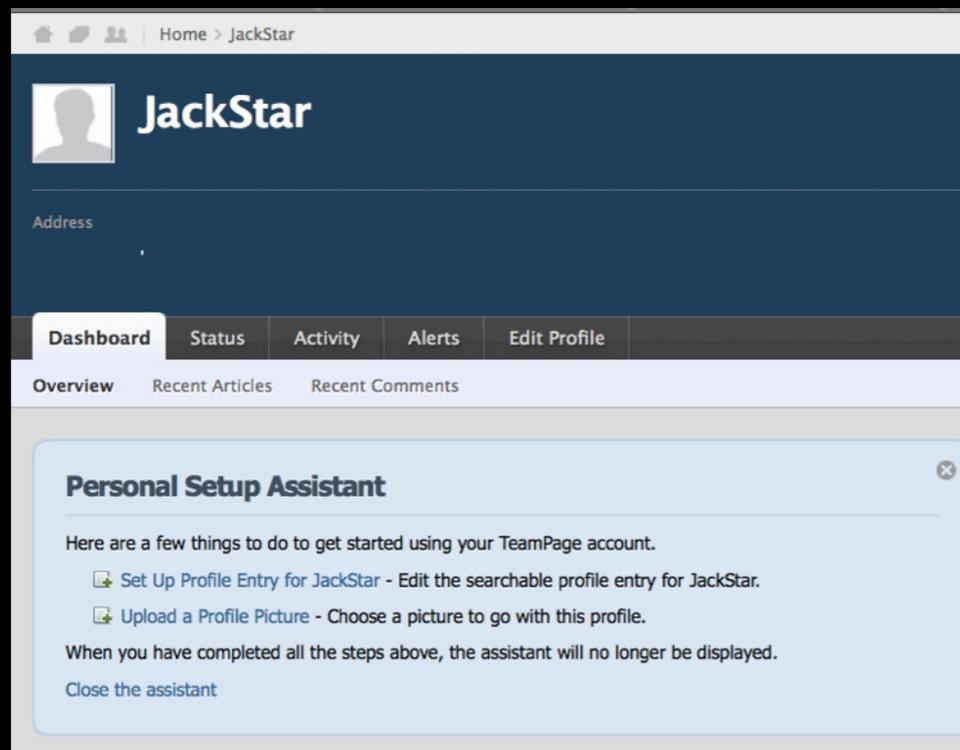
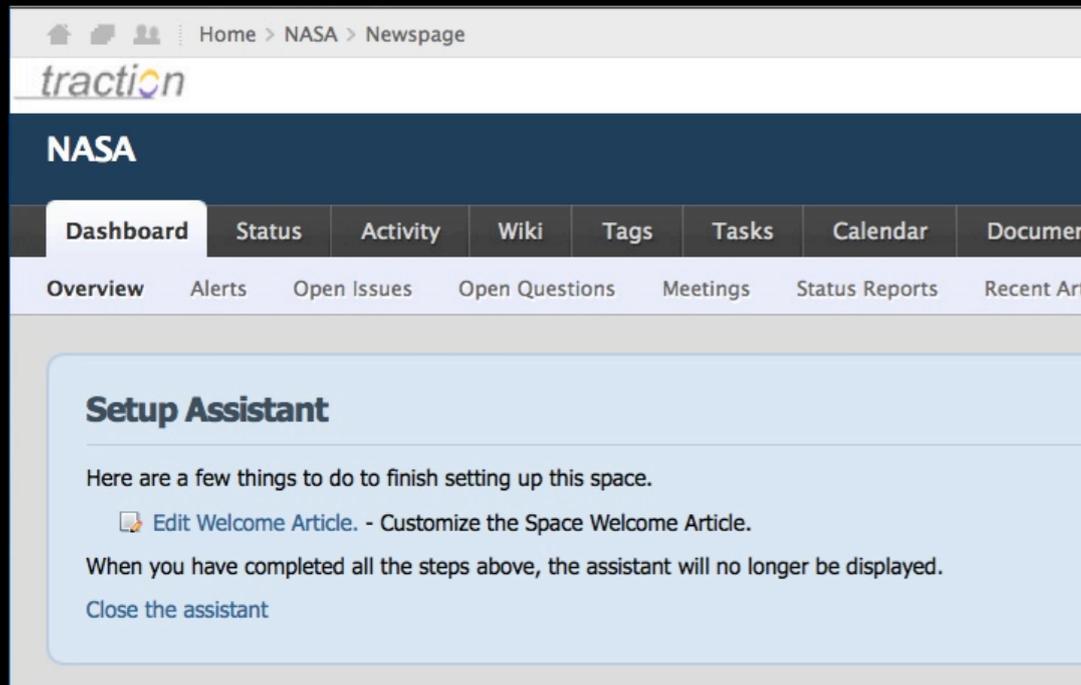
- Tasks are an *entry type* which may have the To Do tag
- To Do sections include Tasks and Articles tagged To Do
- Task sections include tasks tagged To Do

Navlinks to Sidebar Entries and TOC

The screenshot displays the ProductAlpha Newspace interface. The main content area shows a headline titled "Problem with IT LDAP Directory" with a sub-headline "We identified the following problems;". A sidebar on the right contains several sections: "Add New Article", "Add New Task", "Alpha Dashboard" (with links for "Post a Feature or Bug", "Feature and Bug Dashboard", "Alpha PRD", "All Features", "- V2 ToDo", "- V2+ ToDo", "- Unallocated ToDo", and "Feature Ideas"), and "Members" (listing users like admin, Albert Einstein, beth, Greg Lloyd, Michael Burke, paulp, and Sally Su). A red-bordered inset window shows a detailed view of the "Alpha Dashboard" article, including its title, creation date, and a list of navigation links: "Post a Feature or Bug", "Feature and Bug Dashboard", "Alpha PRD", "All Features", "- V2 ToDo", "- V2+ ToDo", "- Unallocated ToDo", and "Feature Ideas". Below the links is an "Article Comments" section with a "Reply" button and a text input field.

- **Sidebar Article (per space, default to server level) can be used for navigation**
 - **Link to views or external sites**
 - **Display important information**
 - **Can link to tags but (unlike navlinks) does not do dynamic display based on all / remaining / or prefix groups**
- **TOC - Table of Contents (defined per space - in Space Setup / Newpage Tab) feature allows selection of Root Articles per space, with expanders that expose child articles.**

Complete or Close Wizards



- **Wizards can be disabled entirely by checking off the Setup Assistant plug-in at Server Setup / Plugins**
- **Front Page Wizard - visible to Server Admins**
 - **Set Metrics user**
 - **Set Tasks user**
 - **Set Profile Space**
 - **Set Status Space**
- **Space Page Wizard - visible to Space Admins and Server Admins**
- **Profile Page Wizard - visible to each user and Server Admins**
 - **Must be closed out by each user**

Set Status and Profile Spaces

The screenshot shows the 'Traction Server server setup' interface. The 'Spaces' tab is selected in the main navigation. Below it, there are sub-tabs: 'Browse Spaces', 'Add Spaces', 'Manage Templates', 'Default Space ACLs', 'Trackback', and 'Special Spaces'. The 'Special Spaces' sub-tab is active. Two configuration sections are visible: 'Profile Space' with a dropdown menu set to 'People' and a description 'This space will be used to store the user's profile entry.'; and 'Default Server-Wide Status Space' with a dropdown menu set to 'Forum' and a description 'This space will be the default space in which server-wide status updates are stored.' At the bottom of the form, there are 'Exit', 'Reset', and 'Apply' buttons. The version number '5.021' is displayed in the bottom right corner.

- **None selected is OK, but awkward for Profiles**
- **Each choice should (at least) allow Everyone to read, author, edit own, publish own**
- **Consider dedicated space for Profiles (cleaner tag cloud, search for People, and so on)**

Set Metrics and Tasks Users

The screenshot shows the 'Daemons' configuration page in the Traction Software server setup interface. The 'Enable Daemon Tasks' checkbox is checked. Below the text, a table lists various daemons with their configurations.

File	Name	Description	User	Period (ms)	Enabled
attivioindexer.properties	Attivio Search Indexer	Periodically puts files into the Attivio Search Index.		10000	<input checked="" type="checkbox"/>
fastindexer.properties	FAST Search Indexer	Periodically puts files into the FAST Search Index.		10000	<input type="checkbox"/>
metrics.properties	Metrics Logger	Flushes metrics data captured to the in-memory buffer to the database.	Visitor	60000	<input checked="" type="checkbox"/>
profilecleanup.properties	Profile Cleanup	Deletes temporary user profiles that were created more than 10 days ago.	Visitor	43200000	<input checked="" type="checkbox"/>

Below the table, the 'Metrics Logger User' is set to 'Greg Lloyd'.

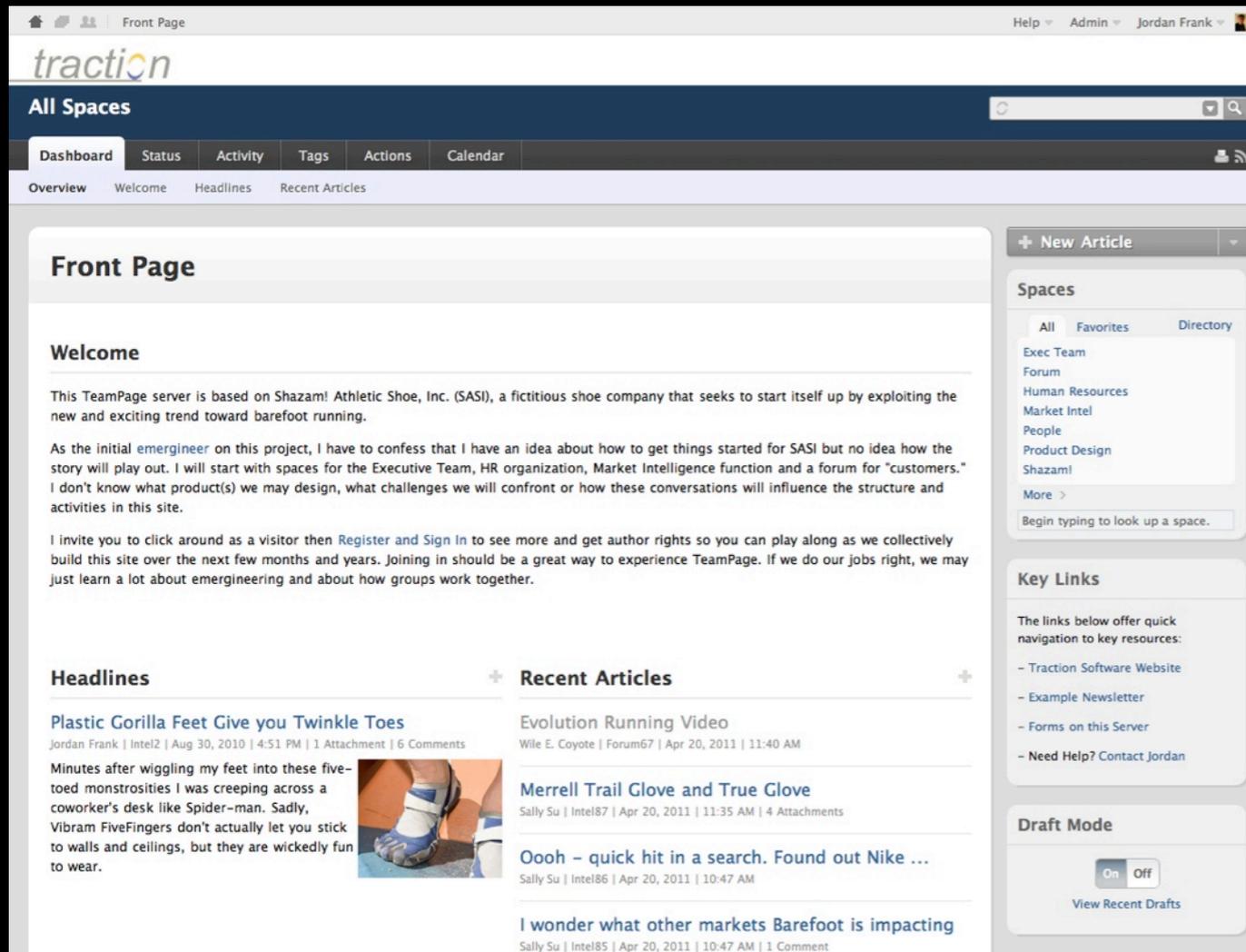
The screenshot shows the 'Event Listeners' configuration page in the Traction Software server setup interface. The 'Enable Event Listeners' checkbox is checked. Below the text, a table lists various event listeners with their configurations.

File	Name	Description	User	Events	Enabled
afistener.properties	Activity Feed Listener	Keeps the Project and Milestone Activity Feed SQL Database Consistent with Journal and File Events		init, *	<input checked="" type="checkbox"/>
debugevent.properties	Debug Event Logger	Logs a message to Debug.event.		init, *	<input checked="" type="checkbox"/>
emailnotifier2.properties	Email Notifier Driven by Sections	Emails new or updated entries to a user according to various preferences.	.	post, edit, reclassify, erase, email, lock, unlock, publish, unpublish, hide, show	<input checked="" type="checkbox"/>
jabber.properties	Jabber Notifier	Sends a Jabber message to users based on the Jabber Notifier plugin configuration.	.	post, edit, reclassify, erase, email, lock, unlock, publish, unpublish, hide, show	<input checked="" type="checkbox"/>
tsimetrics.properties	Metrics	Record metrics about post activity.		post, edit, reclassify, email, erase, lock, unlock, publish, unpublish, hide, show	<input checked="" type="checkbox"/>
newuseralert.properties	New User Alerts	Post an entry and/or send an email when a new user account is created.		user_create	<input checked="" type="checkbox"/>
notifier.properties	Notifier	Uses one or more of the available transport mechanisms (email, Jabber, etc.) to notify each user of an event according to their subscription preferences.		post, edit, reclassify, erase, email, lock, unlock, publish, unpublish, hide, show, file_create, file_edit, file_delete	<input checked="" type="checkbox"/>
attivio updater.properties	Search Updater	Keeps track of the index status of newly added or modified documents.		.	<input checked="" type="checkbox"/>
searchupdater.properties	Search Updater	Keeps track of the index status of newly added or modified documents.		.	<input type="checkbox"/>
taskslistener.properties	Tasks Listener	Keeps the Tasks SQL Database Consistent with the Journal		init, post, edit, reclassify, email, erase, lock, unlock, publish, unpublish, hide, show	<input checked="" type="checkbox"/>

Below the table, the 'Tasks Listener User' is set to 'Greg Lloyd'.

- You probably have a Metrics user set as a carry over from TeamPage 4.x
- Choose a user that has full permissions in all spaces.
- Usually an “admin” user that belongs to Server Administrators and is not a real person
- For Attivio Search customers, this user may be the Indexer user too.

Front Page Considerations



- Over-ride Tab Order / Display - Order and whether to display each tab

Set a Sidebar Article

Add Project, Milestone, Tasking sections

Change existing “todo” driven sections to Task driven sections

Keep or drop “Recent Articles” sections (redundant with Activity, but can be nice to have)

Per Space Considerations

The screenshot shows the 'Market Intel Newspaper' page in a web browser. The page has a dark blue header with the 'traction' logo and navigation tabs for 'Dashboard', 'Status', 'Activity', 'Wiki', 'Tags', 'Actions', 'Calendar', and 'Documents'. Below the header is a navigation bar with links like 'Overview', 'News on Running', 'Headlines', 'Company Profiles (alpha)', 'Product Profiles (alpha)', 'Reports', 'Give us an Intel Tip', 'Ask a Question', and 'Key Intelligence Topics - To Do'. The main content area is divided into several sections: 'News on Running' with a 'Get Your News Widget' button; 'Headlines' featuring an article titled 'Plastic Gorilla Feet Give you Twinkle Toes' with a small image of feet in shoes; 'Company Profiles (alpha)' listing 'Nike' and 'Vibram'; 'Product Profiles (alpha)' listing 'Merrell Trail Glove and True Glove' and 'Vibram Five Fingers'; 'Reports' with articles like 'Detailed Analysis of the Downtown Jingle Bell 5K' and 'Lightweight running shoes getting attention'; and 'Give us an Intel Tip' with an article about 'Vibram concerned about counterfeit menace'. A right sidebar contains a 'New Article' button, 'Key Links' (Traction Software Website, Example Newsletter, Forms on this Server, Need Help? Contact Jordan), 'Alerts' (Watch this space, More Options...), and 'Metrics' (Show metrics report).

- Over-ride Tab Order / Display - Order and whether to display each tab
- Edit Wiki Home Article
- Add Table of Contents - Root Articles
- Set a Sidebar Article
- Add Project, Milestone, Tasking sections
- Change existing “todo” driven sections to Task driven sections
- Keep or drop “Recent Articles” newspaper sections (redundant with Activity, but can be nice to have)
- Set a Space Members group

Tell People to Edit Profile

The image shows a user profile page for 'Wile E. Coyote' with an 'Edit Profile' form. The form includes fields for 'Basic Information' (First Name, Last Name, Full Name, Type of Organization, Organization, Job Title, Department) and a 'Sharing' dialog box. The 'Sharing' dialog box has two options: 'Allow All Registered Users to See Your Profile Information' and 'Allow Anonymous Visitors to See Your Profile Information', both with a 'Yes' dropdown menu. The 'Save' and 'Cancel' buttons are at the bottom of the dialog.

Field	Value
First Name *	Wile
Last Name *	Coyote
Full Name	Wile E. Coyote
Type of Organization	Business
Organization	ACME Corp
Job Title	Product Tester
Department	

Sharing

Allow All Registered Users to See Your Profile Information

Allow Anonymous Visitors to See Your Profile Information

- When you are ready to roll, tell users to edit their profile
- The 'Sharing' options are at the bottom of the edit form.
- Specified fields can be “read only” and auto-populated from AD if you add and configure a plug-in for this purpose.

WebDAV - IE 6/7 to IE8+ issues

- **Microsoft made IE more finicky about security in IE8. If people use the browser based EDIT button to launch and edit MS Office files or use Windows Explorer to open Share Folders, the following two server configuration options should make WebDAV work OK:**
 - **HTTPS - ensure you have a certificate on your server and users access via HTTPS**
 - **No reverse proxy - ensure there is not a reverse proxy server in front of TeamPage.**

Still need Mexico Skin?

- **Microsoft made IE more finicky about security in IE8. If people use the browser based EDIT button to launch and edit MS Office files or use Windows Explorer to open Share Folders, the following two server configuration options should make WebDAV work OK:**
 - **HTTPS - ensure you have a certificate (preferably GoDaddy or Verisign - IE is finicky about the issuer) on your server and users access via HTTPS**
 - **No reverse proxy - ensure there is not a reverse proxy server in front of TeamPage.**