



# Reference Guide for End Users

## Key References for Livelink End Users

### 1. Livelink's Three Workspaces

- The **Enterprise Workspace** is an area to locate, store, and work with general organizational information.
- **Project Workspaces** provide environments for teams to collaborate and work towards common team goals.
- Each user has their own **Personal Workspace** to manage their assigned work and store information of importance to them.

### 2. Logging into Livelink

- Enter the Internet address (URL)

[Http://livelink.nd.edu](http://livelink.nd.edu)

- For easy access, bookmark this **URL** or mark it as a **Favorite**
- Enter your **Livelink username (afsid) and password**.
- Click on the **Log-in** button

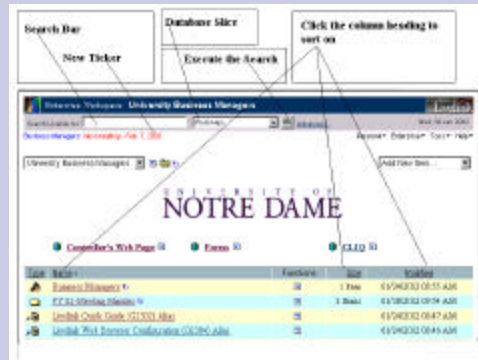


- To change your password, select **Tools-Settings**
- **Password Tab**

### 3. Searching for Information

Livelink performs a full text search for words entered in the search field. The drop down list beside the search field (From Here) as seen in the image below) offers different slices or areas of the index to search.

- **From Here:** contains information from the current folder down
- **Enterprise:** contains information about the most recent versions of item stored in Livelink
- **Enterprise (All Version):** same as the above, but includes all versions of items stored in Livelink



### 4. Adding a Document to Livelink

A document can be any file in electronic format (Word documents, Excel spreadsheets, images, etc)

- From the **Add New Item** menu in the folder where the document is to be added, select **Document**
- Enter the information into the fields as indicated in the image below. Use the **Browse** button to select a file from your desktop or the network



### 5. Revising Documents

To modify a document in Livelink, go to the Function drop down box. From here a variety of functions including reserve, add version, move, and create aliases are available from the **Functions** menu.

#### Common Document Functions:

#### Reserve and Unreserve:

- Reserve write-locks the document to prevent others from making changes, and unreserve releases the lock
- A red check mark appears beside a reserved document name

#### To reserve an item:

- Click the Item's **Functions icon**, and choose **Reserve**
- Click the name of the Livelink user or group you want to reserve the document in the Reserve By field
- To save a copy of the document, click the **Download** link. Browse to the location where you want to store the file in the **Save as** dialogue box and click the **Save** button
- Click the **Submit** button on the Reserve page

#### To unreserve an item:

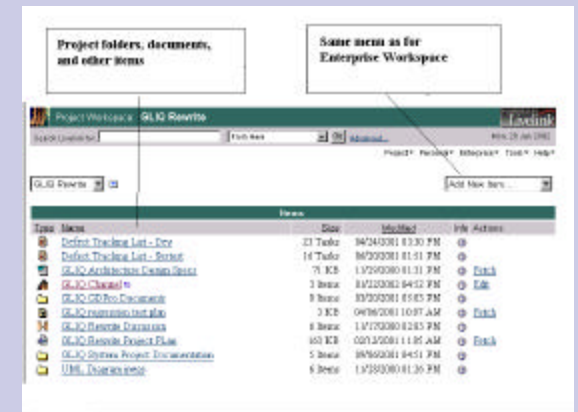
- Click the item's **Functions icon**, and choose **unreserve**
- Select the **Add New Version** option
- Type information about the changes you made to the document in the Description field, if desired
- Click the **Browse** button
- In the File Upload or Choose File dialog box, browse to the document you want to add, click its name, and then click **Open** button
- To modify the categories and attributes for the document, click the **Edit** button
- Click the **Submit** button

**Move**-Moves a document to a different location in Livelink

**Alias**-Adds a link to an original item allowing the item's name to appear in more than one place

### 6. Project and Project Workspaces

A project is a branch of the Enterprise dedicated to a group of team members. Livelink organizes the project workspaces with a special interface designed towards group participation. A sample Project Workspace is shown below.



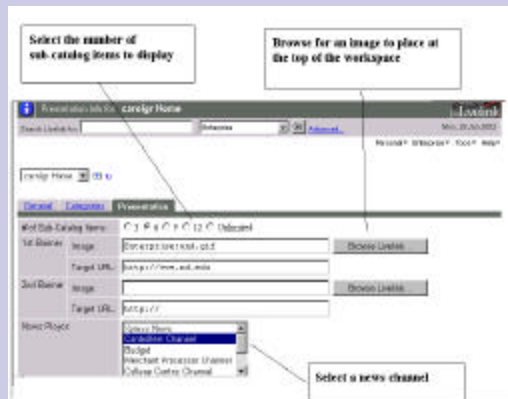
When a project is created, the participants are placed into one of the three groups:

- **Coordinator**-full read/write/edit/delete access including adding new participants to the project
- **Member**-add items with the ability to delete and edit items added by the member
- **Guest**-read only access within the project

The Livelink projects you participate in are accessible through your **Personal Workspace** Menu.

## 7. Customizing Your Folder or Project Workspace

- Select the folder or project's information icon
- By accessing the Presentation tab you can turn on the search bar, select news channels select the number of sub-catalog items to display, and place an image or two at the top of the folder or workspace (note: the image must already have been added to Livelink)
- Click the *Update* button when finished



## 8. Working with Compound Documents

Compound Documents can be used for documents that are comprised of more than one component, for example:

- A manual containing policies and procedures
- A manual with chapters and a table of contents
- A detailed proposal with specifications and a cover letter

Like a Folder, a Compound Document is a container for a group of items. A Compound Document is different from a Folder in that:

- **Its components can be ordered sequentially**
- **It can contain a master document which might be an index, table of contents, or cover letter**
- **You can make releases and revisions to it**

### Create a Compound Document

1. Go to the Folder in which you want to add the Compound Document. The **Add New Item** menu appears in the top right of the browser page if you have the permission to add items to this Folder
2. Select Compound Document from the **Add New Item** menu. The Add Compound Document Window will appear.
3. In the **Name** field, replace New Compound Document with the name you want to use.
4. If you wish, add additional information in the Description text box.
5. Click the **Add Item** button to add the new Compound Document to the location you chose.

## Adjusting Fetch Behavior

If you want the fetch behavior...	Do this..
<b>When the browser is Microsoft Internet Explorer, fetch immediately opens the document in its native format</b>	In the View menu, click Folder Options click the File Types tab, and clear the Confirm open after download check box.
<b>When the browser is Microsoft Internet Explorer, fetch lets you specify where you want to save the file on your computer instead of launching the file</b>	In the View menu, click File Options, click the File Types tab, and select the Confirm open after download check box.
<b>When the browser is Netscape Navigator, fetch does not display the warning about a possible security hazard</b>	In the Warning dialog box, clear the Always ask before opening this file type check box.
<b>When the browser is Netscape Navigator, fetch prompts you to specify where you want to save the file on your computer rather than asking you whether you want to open it or save it to disk</b>	In the Edit menu, click Presentation, click Application, and select the Save to disk radio button
<b>When the browser is Netscape Navigator, fetch saves the file to your computer rather than asking you whether you want to open it or save it to disk</b>	In the Edit menu, click Preferences, click Application, select the Save to disk radio button and clear the Ask me before opening downloaded files of this type check box

## Web Browsers and Livelink

To access Livelink, you must use a Web browser. Supported browsers:

- Netscape Navigator Version 4.72 or higher
- Microsoft Internet Explorer Version 5.0 or higher

### Adjusting Browser Settings

A number of settings must be adjusted so your browser can work with Livelink. For complete instructions, refer to Livelink Web browser Configuration documentation (G2304).

- The cache must be set to refresh on every visit to a Web page
- The browser must be set to accept all cookies
- The Java compiler must be enabled
- File type settings for viewing and fetching each type of Livelink item must be set
- File values for Macintosh/Windows interoperability (if required) must be set

Refer to the Livelink Web Browser Configuration documentation (G2304) for restrictions that apply to Livelink on a Macintosh computer.



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