



# IBM Connections Cloud

## Basic Guide: Uploading, Sharing and Editing files

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If you have any queries about this guide or require any additional training, please contact the ICT Helpdesk on 1200	



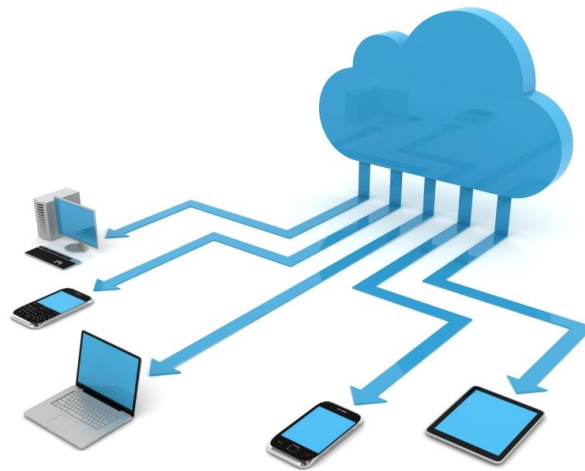
## Introduction

### What is the IBM Connections Cloud?

The IBM Connections Cloud is an online social networking tool for people working within a company. As well as e mail, calendar, activity, conference and forum functions, it is a file storage and sharing tool, which enables users to create, upload, share and edit files and documents, such as Word and Excel Spreadsheets.

It also enables the creation of “Communities” or groups/teams, so that members of the community are able to view and edit shared documents online.

### How do I access “The Cloud”?



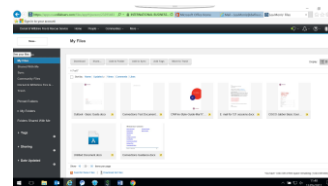
You can access the IBM Connections Cloud via any internet enabled device, providing you have an internet connection.



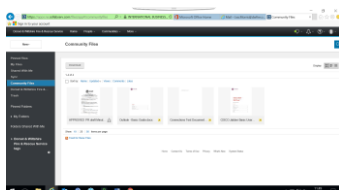
Create and store your files as normal on your device.



Then upload them to the IBM Connections Cloud for backup and sharing



**My Files and Folders** - View, edit and share the files you have uploaded, or files which have been shared with you. *Set file sharing options here for individual or Community access*



**Community Files and Folders** – files which you have shared with others in a Community, with access to view or edit by Community members



## Whats so good about “The Cloud”?

- By using the Cloud to store your files, you can access them from any device, wherever you, are at any time
- You can share your files with others without having to send them by e mail
- As your files are stored remotely, they can be accessed even if the device you normally use malfunctions, so you wont lose any work

## What does this Guide cover?

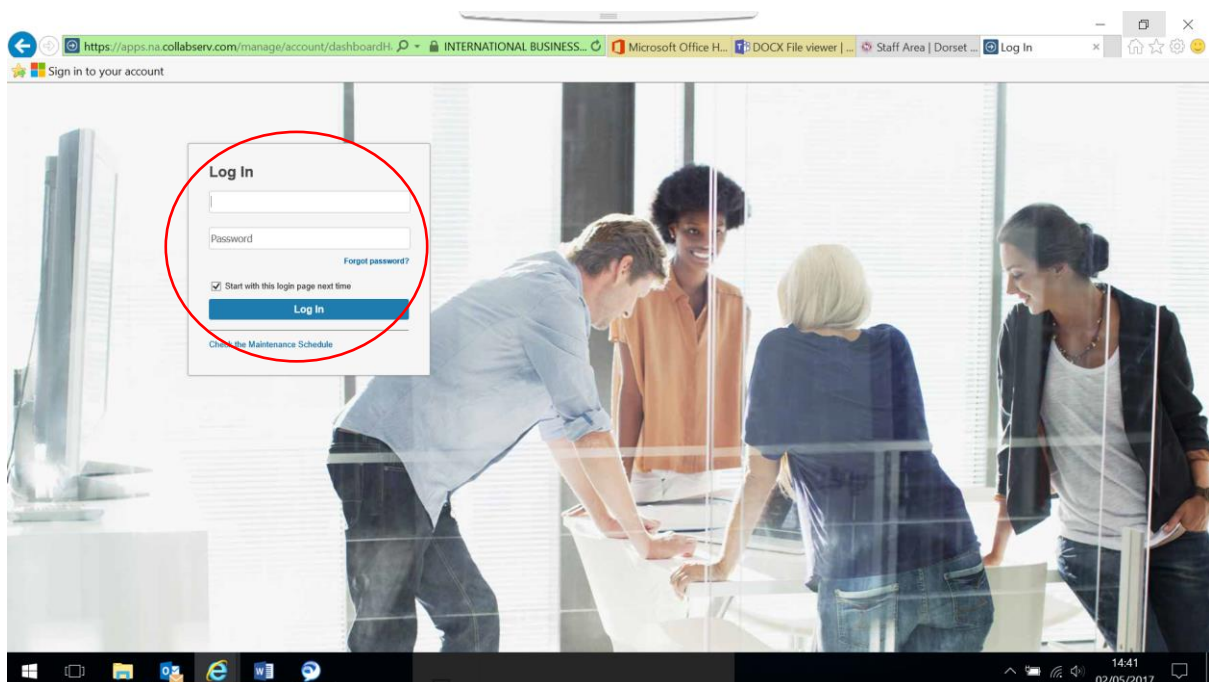
This guide provides IBM Connections Cloud users with the basic information to enable them to;

- upload Files
- create new Folders
- put Files into Folders
- create new Communities
- Share Files and Folders with individuals and Communities
- add or invite other users to communities
- Edit files online

## Getting started

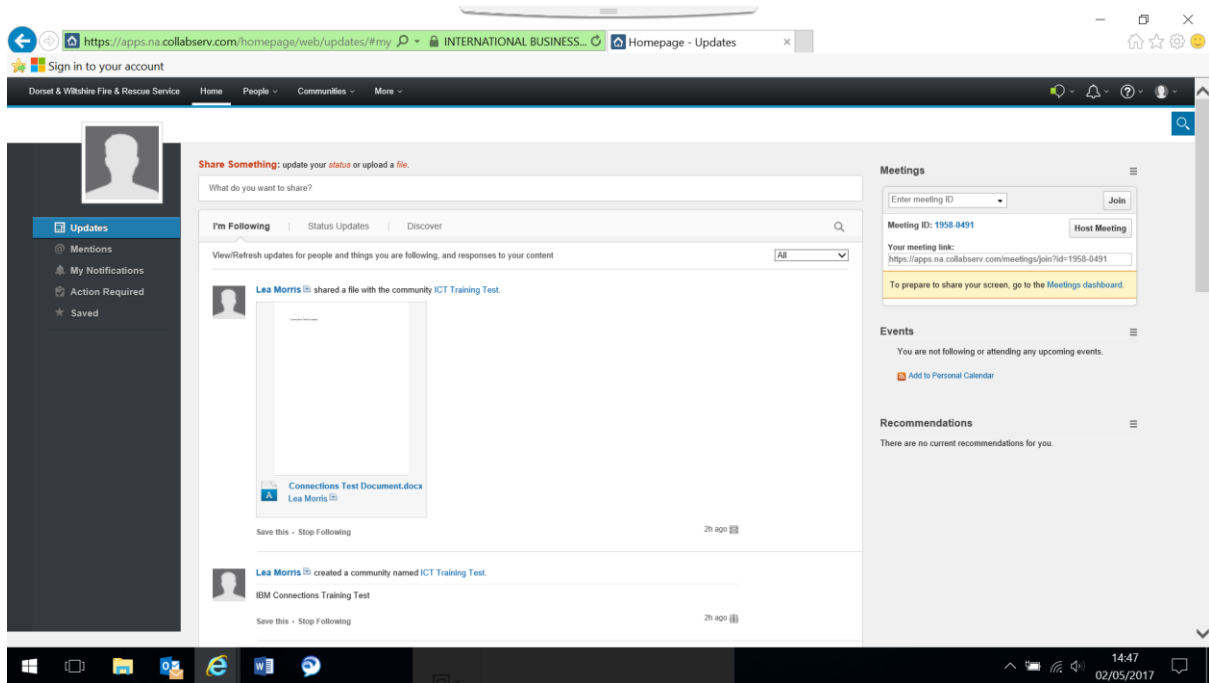
To access IBM Connections, you will first need to have had your account set up, and been sent an e mail link to login and set your password.

Once your account has been set up, and you have set your own password, you will then be able to Login via the IBM Connections Login Screen;





Following Login, the Connections Home Screen will appear;

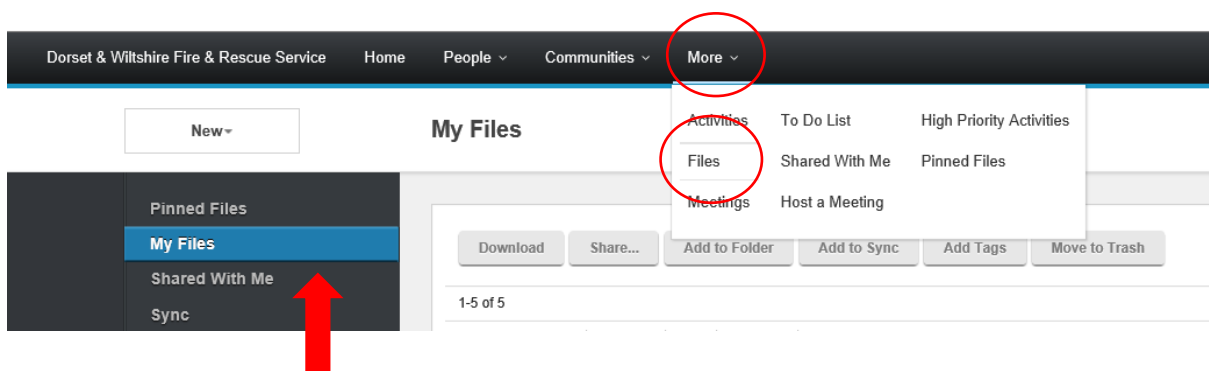


## Uploading your Files and Documents to the IBM Connections Cloud

You can upload files and documents from your own device to the IBM Connections Cloud, to enable them to be shared with other users, as well as edited online by other users.

To upload a file from your device;

- Click on the “More” drop down menu on the Menu bar at the top of the screen
- Then click on the “Files” option from the drop down list





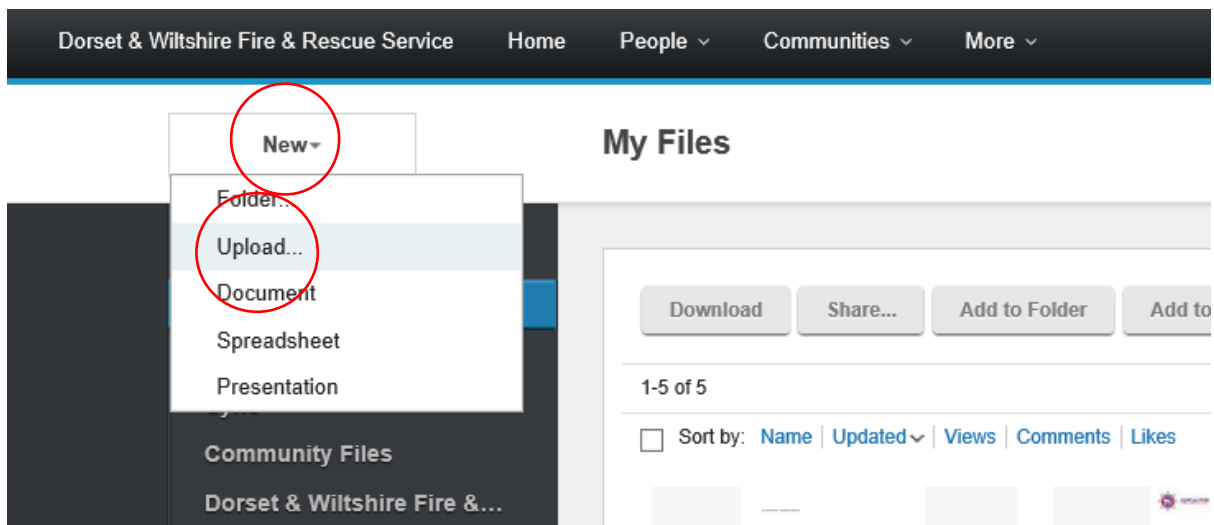
This will open the “My Files” page.

**Remember:**

- Always upload your documents and files to the “My Files” page – so that you are then the “owner” of the file
- Don’t “give” a copy to other people or communities – retain ownership yourself and “share” your files and documents

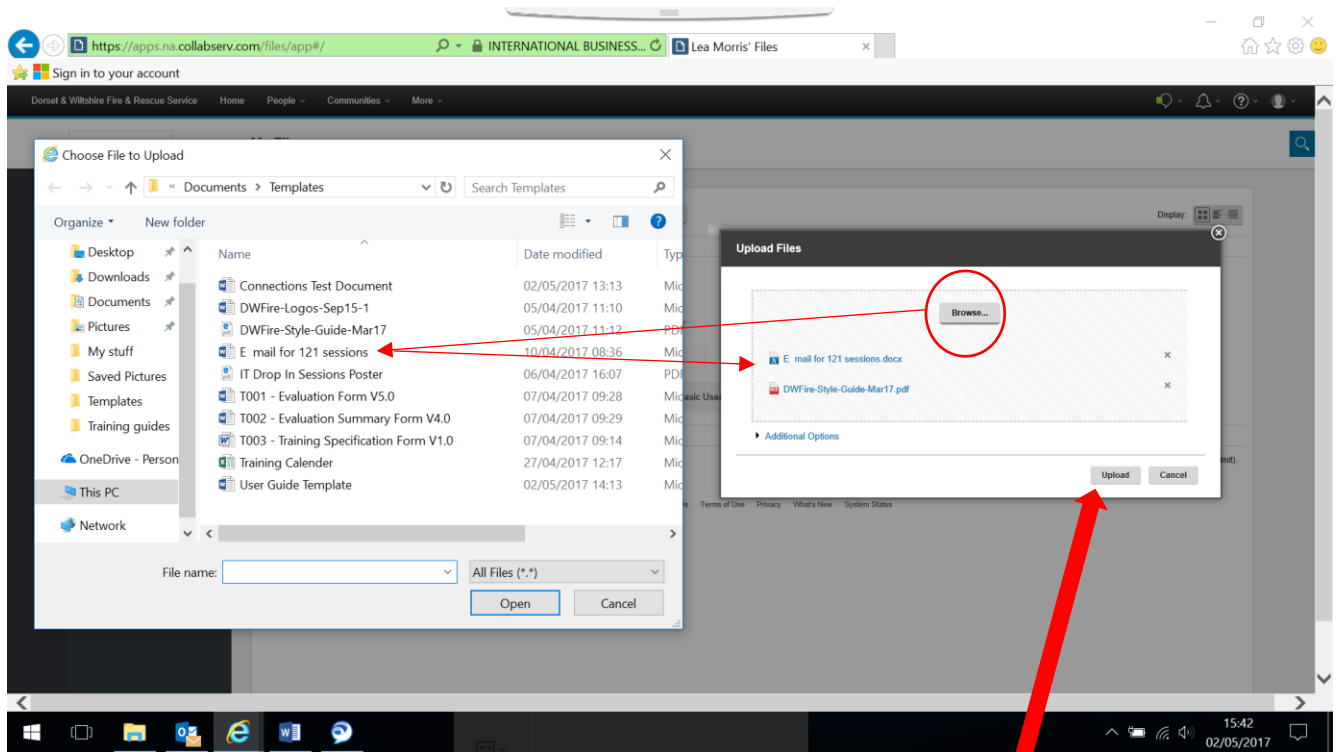
To upload a new file;

- Click on the “New” drop down menu
- Select “Upload” for the list



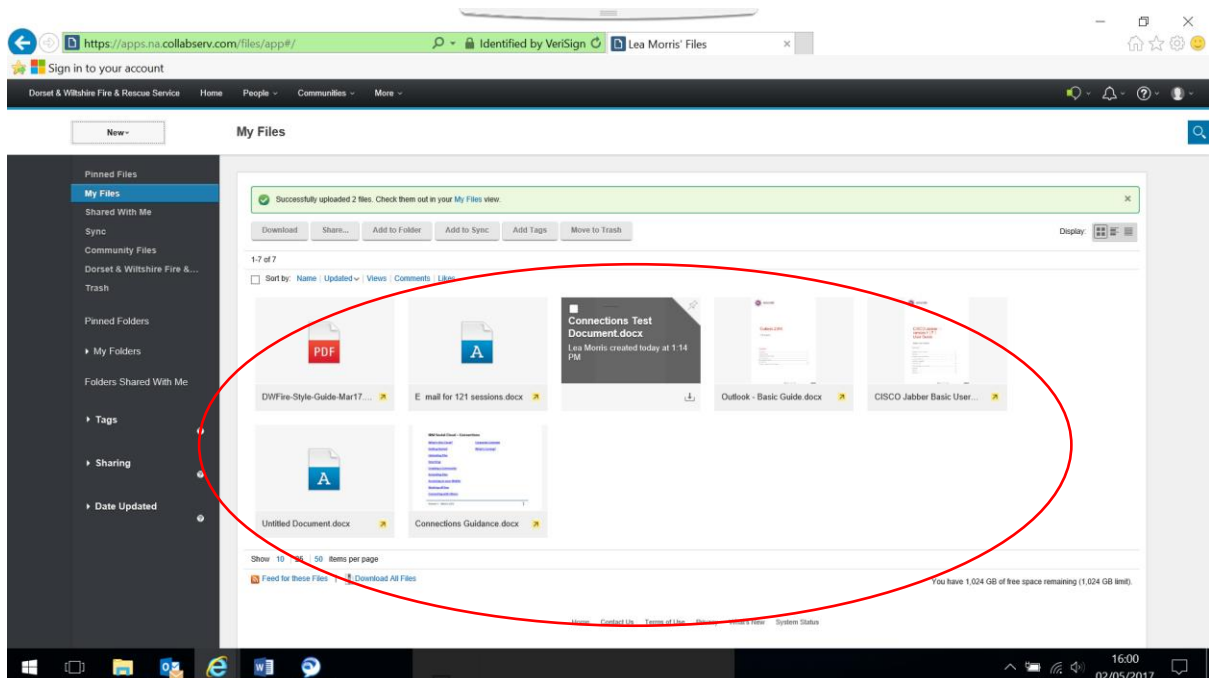
This will open up the Upload Files window;

- Click the Browse button to open up the “Choose file to upload window”
- Find the file you wish to upload from your folder list, then double click on it to select and add it to the Upload files window
- Do this for each file you wish to upload
- You can upload several files at once. They are listed in the Upload Files window.



- Once you have selected all the files you wish to upload, click the “Upload” button to upload.

Uploaded documents are then displayed in your “My Files” page;



## Tip

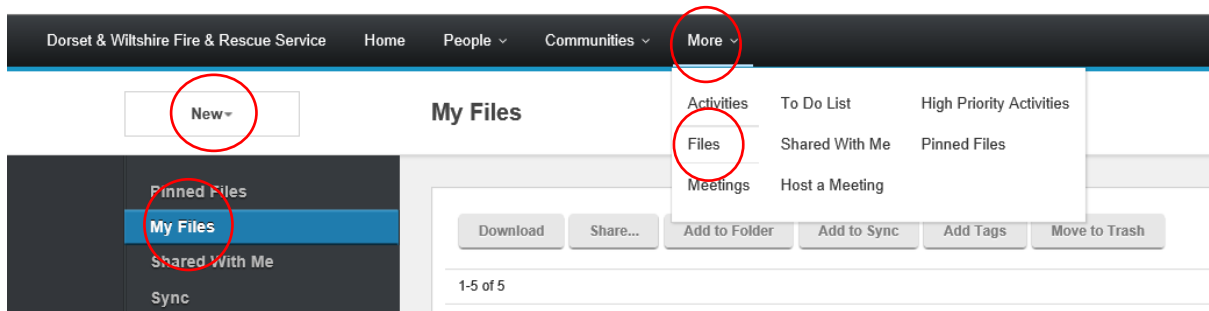
- Save important files into “My Files” on the Connections Cloud, as a backup



## Creating a new Folder

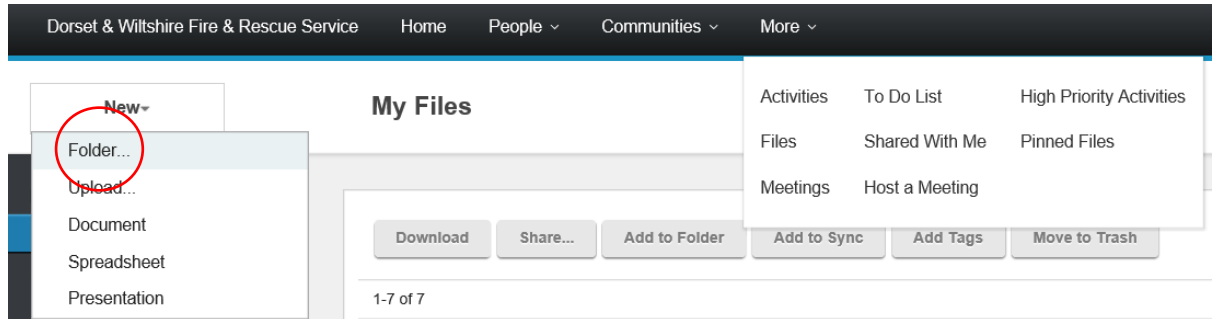
To create a new Folder,

- Click on “More” on the menu bar
- Click on “Files” from the drop down menu
- This will open the “My Files” window
- Click the “New” drop down menu



From the “New” drop down menu;

- Click on “Folder”



The New Folder window will open;

- Complete the text fields to name and describe the Folder
- Select the Sharing rules for this folder as appropriate
- Click on Create to create the new folder



**New Folder**

\*Name:

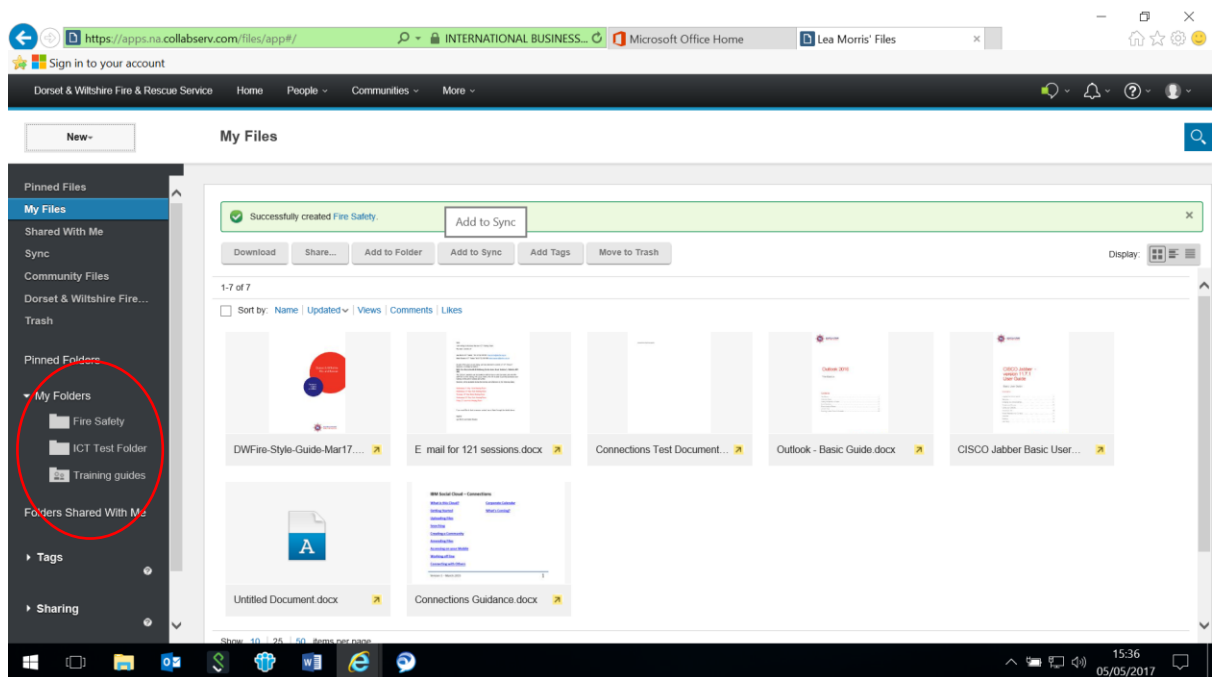
Description:

Share with:  No one (shared with me only)  
 People or Communities (give specific permissions to others)  
 Everyone in my organization

External access:  Folder can be shared with people external to my organization

\* Required

The new folder will be added on the left hand side under the “My Folders” drop down menu;

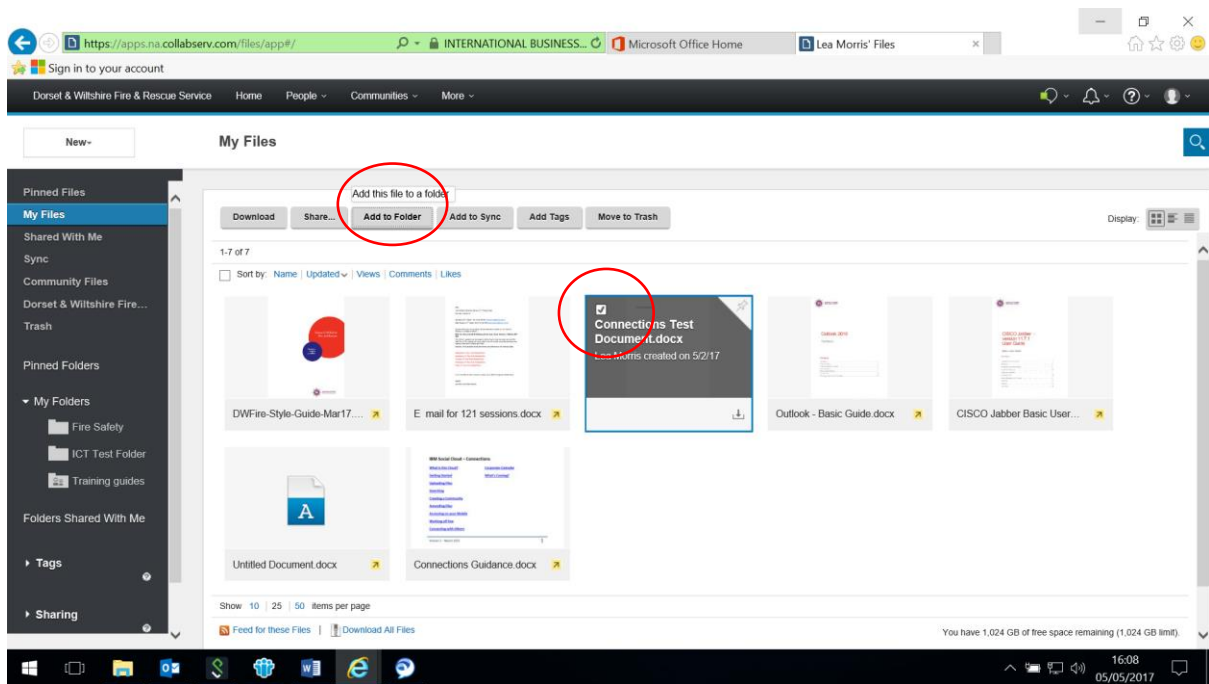


## Putting Files into Folders

Files can be put into Folders by;

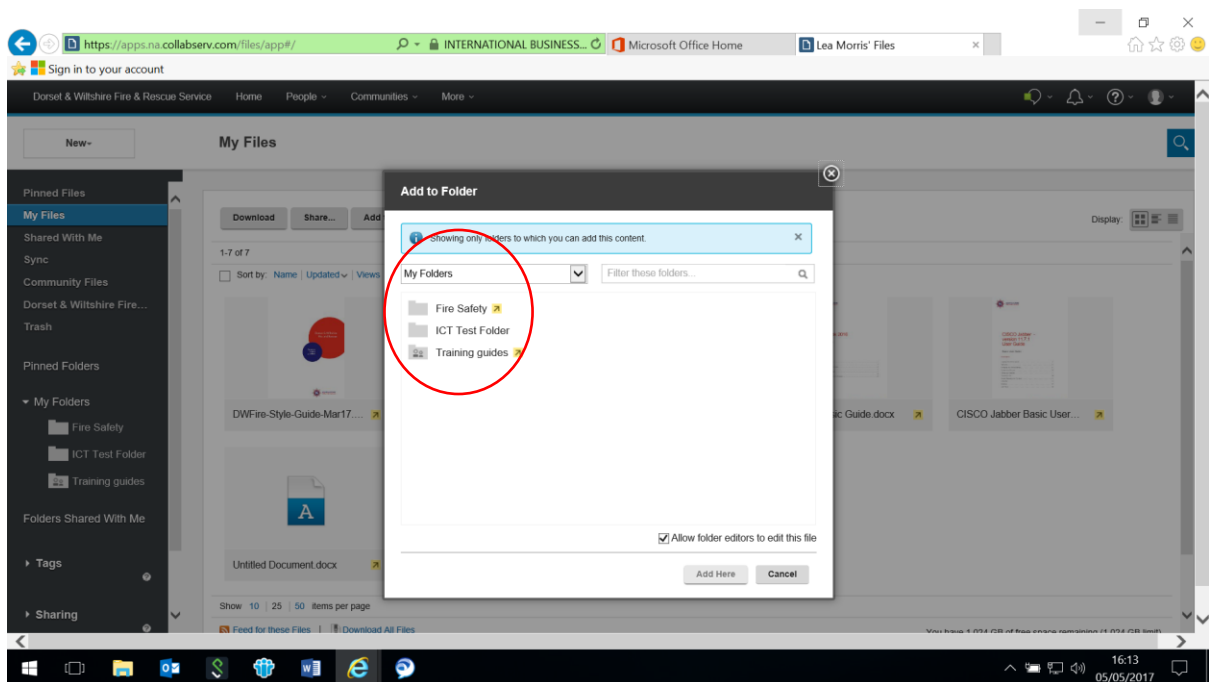
- Ticking the “File Selection” box on the file you wish to move
- Clicking on the “Add to Folder” button





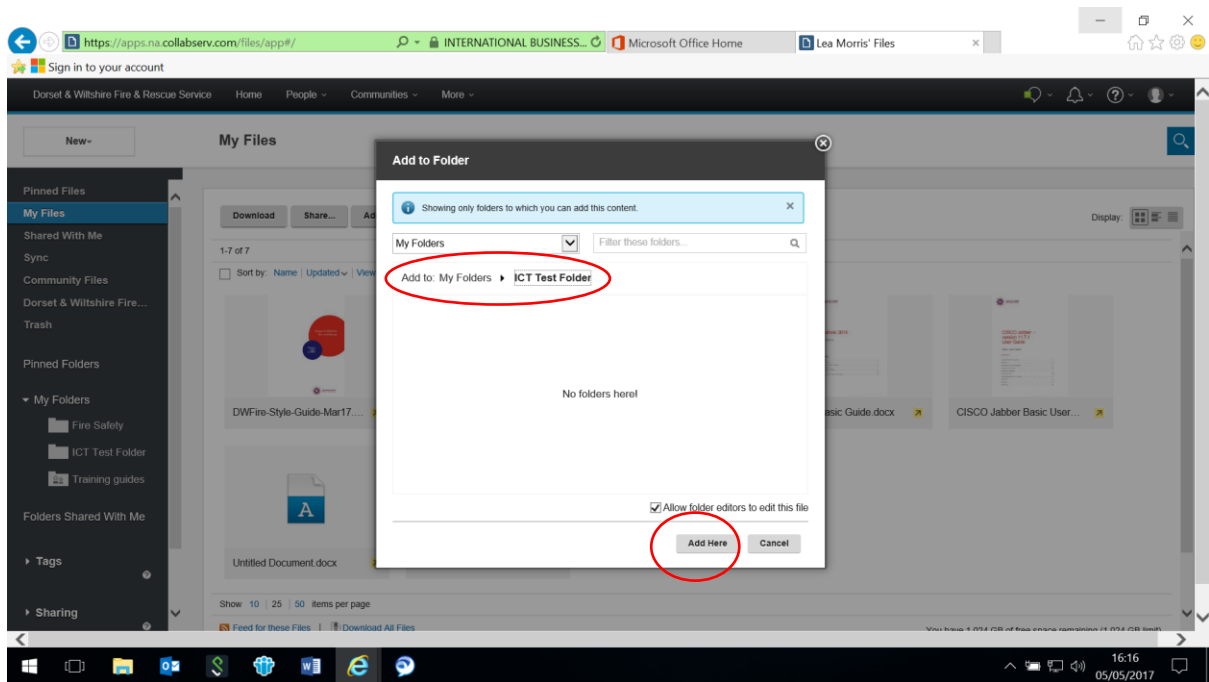
The “Add to Folder” window will open;

- Select the folder you wish to move the File to from the list displayed



The selected file will be displayed;

- Click the “Add here” button to move the selected file to that Folder



The selected File is then added to that folder.

**Tip** – Files can also be moved to Folders by “clicking, dragging and dropping” the chosen file into the required Folder in the My Folders drop down list;

- Click on the file to be moved from the My Files window – hold the left mouse button down
- Drag the file across to the left hand side of the screen, and hover over the Folder you wish to move the file to
- When the folder name is highlighted, release the left mouse button to drop the selected file into that Folder





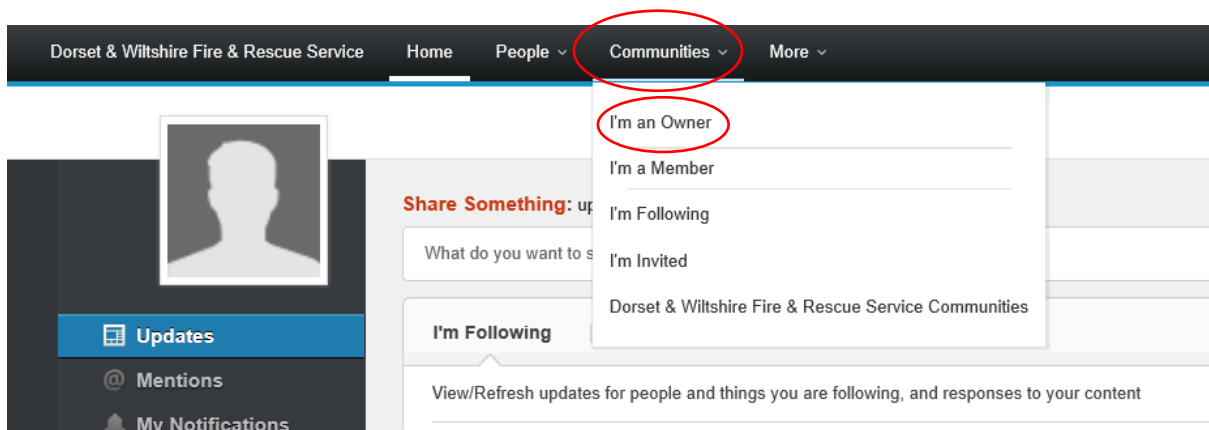
## Creating a “Community”

A “community” is basically a group of people with whom you wish to share your files, to enable them to read and /or edit them online, and communicate with via IBM Connections.

The Community could be the rest of your team, or people you are working with on a project.

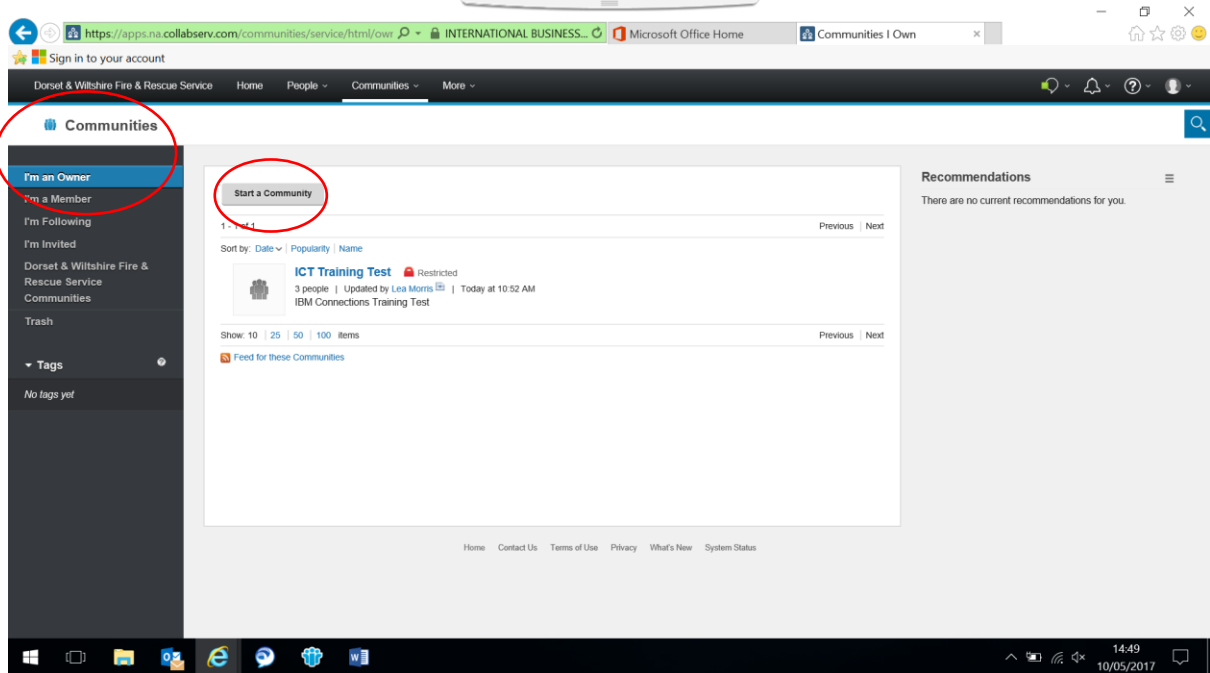
To set up a Community;

- Click on the Communities drop down menu on the Menu Bar
- Select “I’m an Owner” from the drop down menu



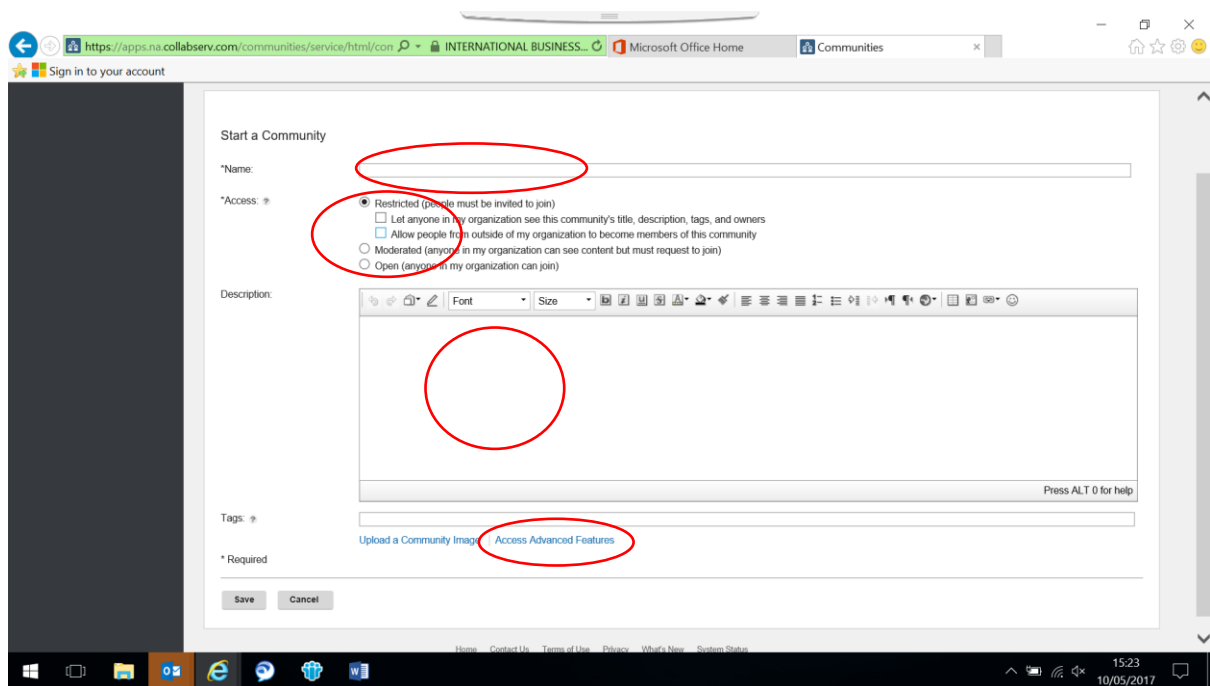
The “Communities” page will open.

- Click on the “Start a Community” button



The “Start a Community” page will open;

- Complete the Test fields as appropriate
- Click the “Restricted” button **On**
- **Untick** the “Allow people from outside...” tick box
- Click on the “Access Advanced Features” link if you wish to set up Community members at this stage
- Click the Save button to save





Description:

Press ALT 0 for help

Tags:

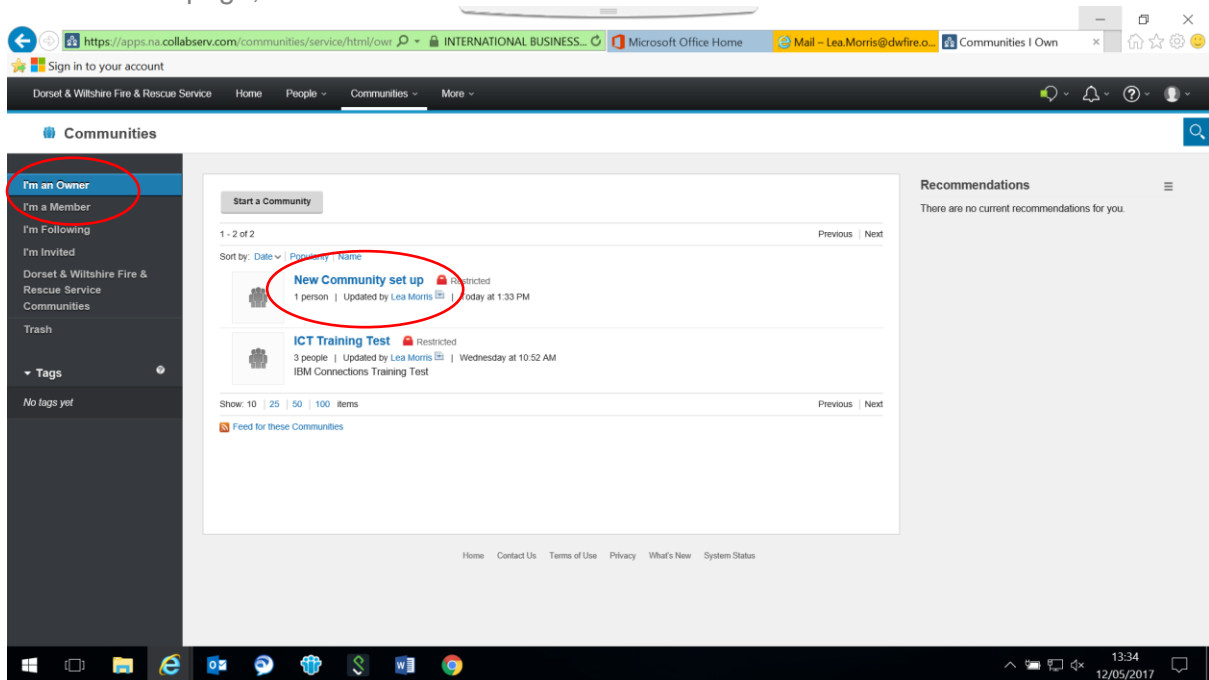
Members: [Upload a Community Image](#)  
Select a role and add people to that role.

Members

\* Required

Save Cancel

The new Community you have created will now appear in the appropriate section of the Communities page;



## Sharing your Files and Folders

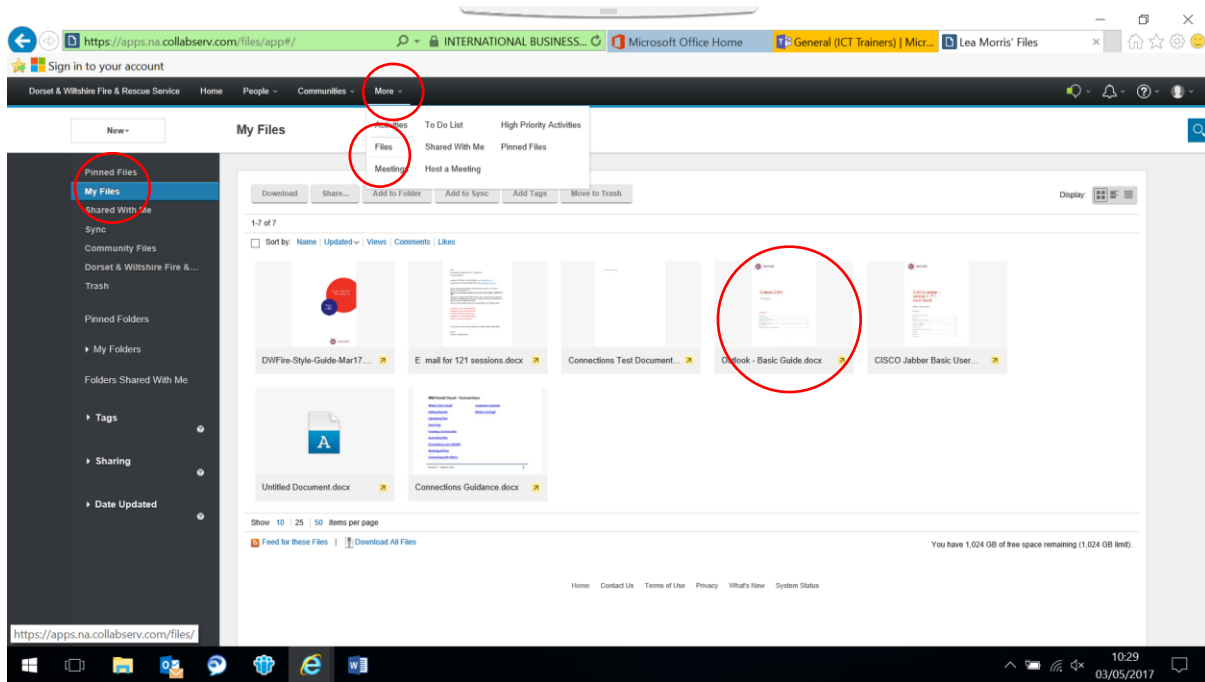
### Sharing your Files and Folders with an individual

To share your Files with an individual;

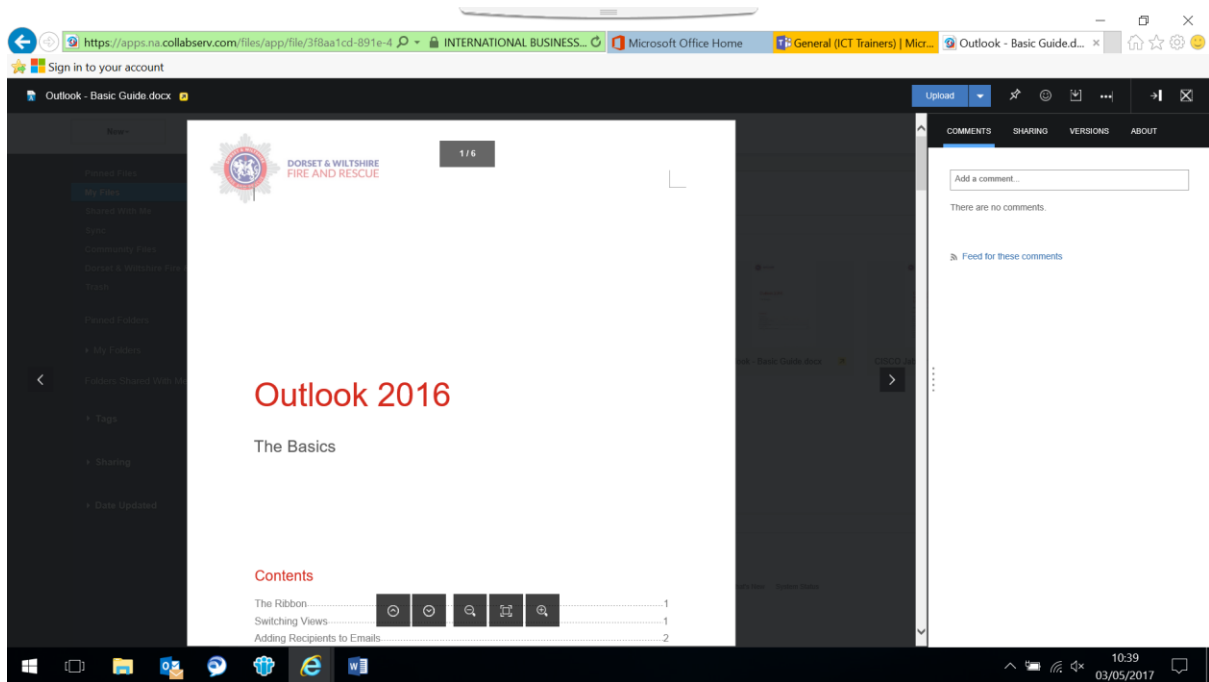
- Click on the “More” drop down menu on the menu bar, and select “Files” from the menu list. This will open your “My Files” page



➤ Select the file you wish to share by clicking on it



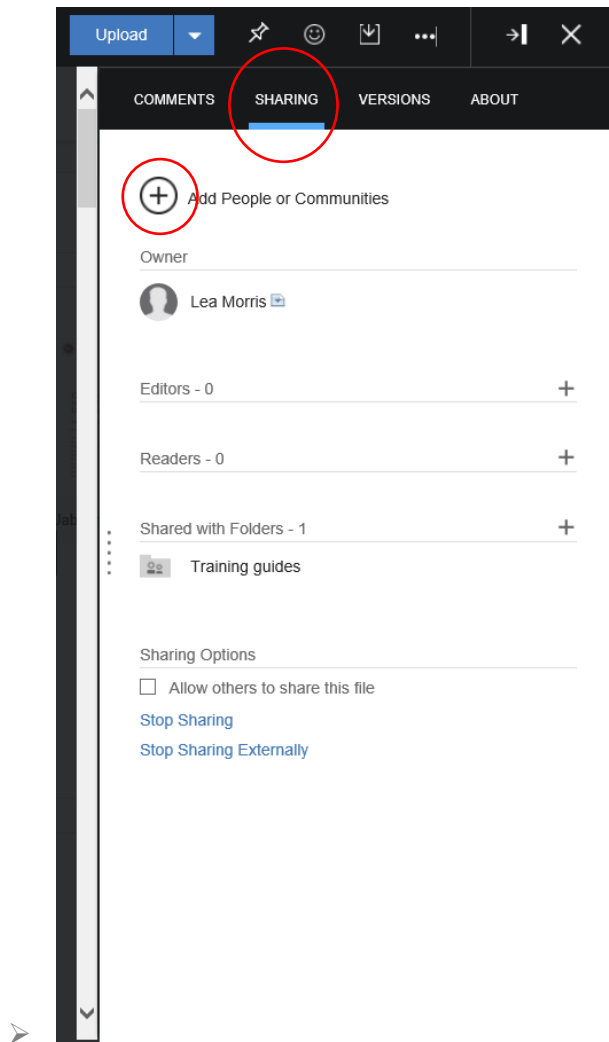
When you click on the File, it will open a new window to view and manage the file settings;



On the top right hand side, select the Sharing drop down menu. This will open the Sharing menu options;

- Click on the “Add People or Communities”

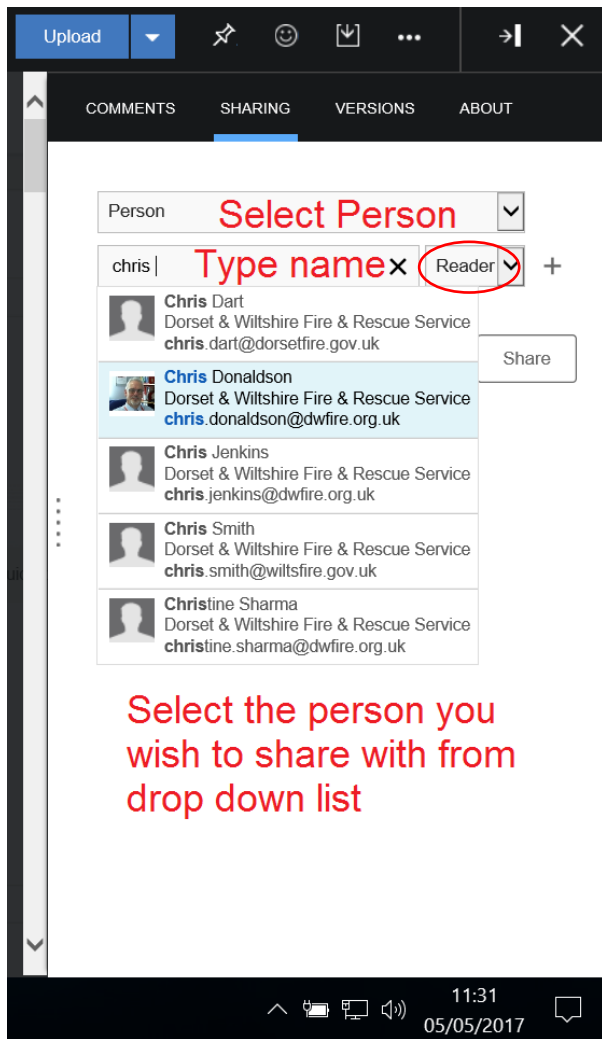




This will open the Sharing selection menu.

- Select “Person” from the drop down menu
- Select either “Editor” or “Reader” from the drop down menu;  
**Editor** – this person will be able to edit the shared file  
**Reader** – this person will have “view only” access to the shared file
- Type the Name of the person you wish to share the file with. As you type, you will be shown a drop down Name list to choose that person from.
- Click on the person you wish to share with – their name will be added below, click on Cancel or Share as appropriate.

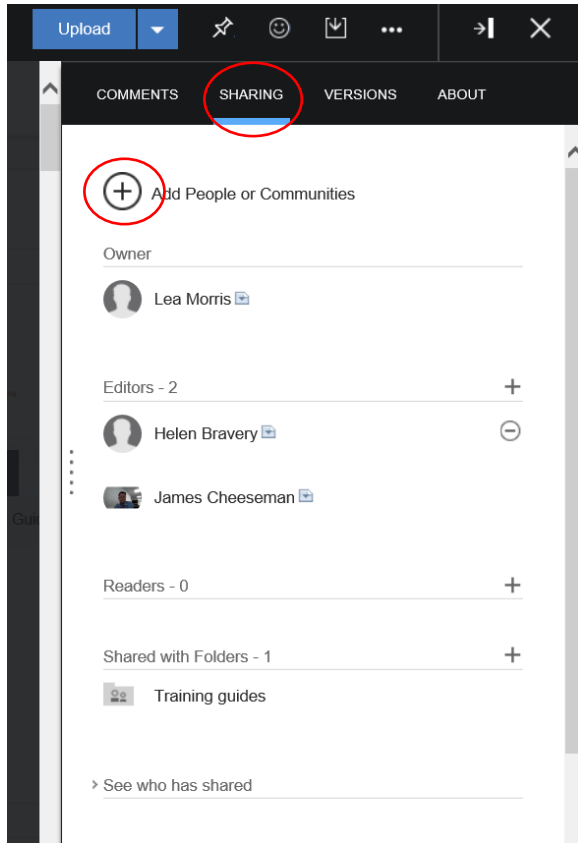
**Tip** – Select the Editor or Reader option *before* you type the name in, as their name and sharing access is added straight away.



Repeat these steps to share the file with additional people.

Once you have added a Person, the Sharing Summary window will display, to show who is sharing and whether they are Editors or Readers.

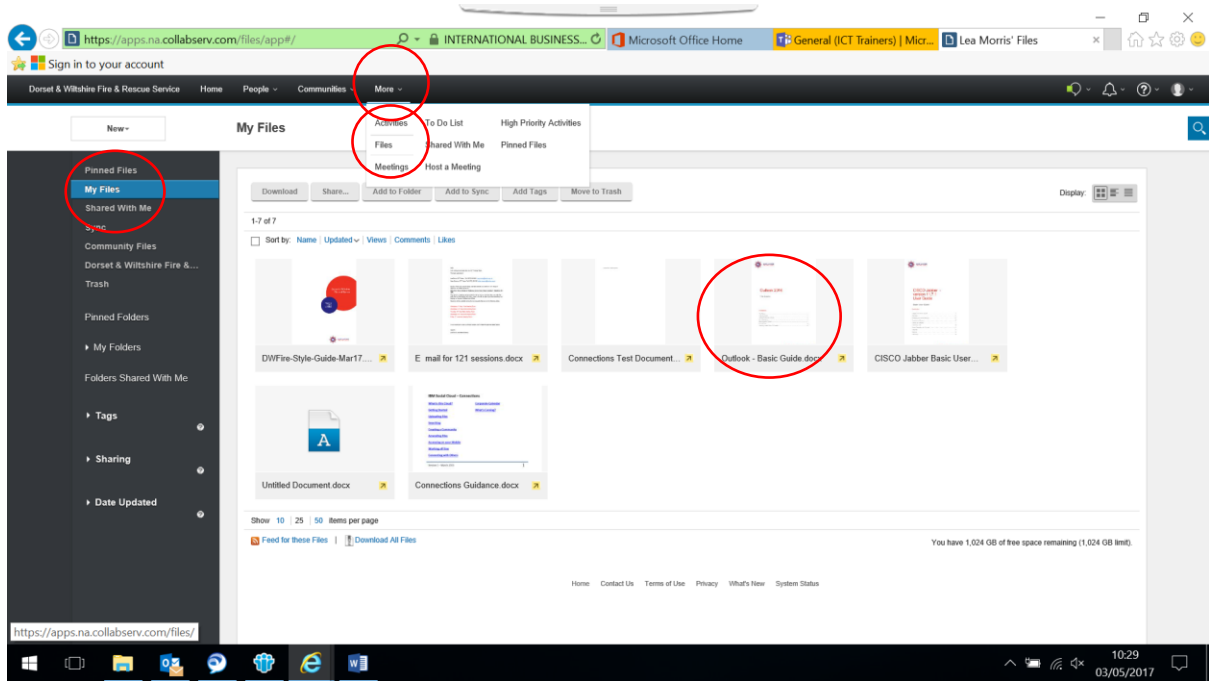
You can manage the Sharing from here by clicking on the + and – symbols;



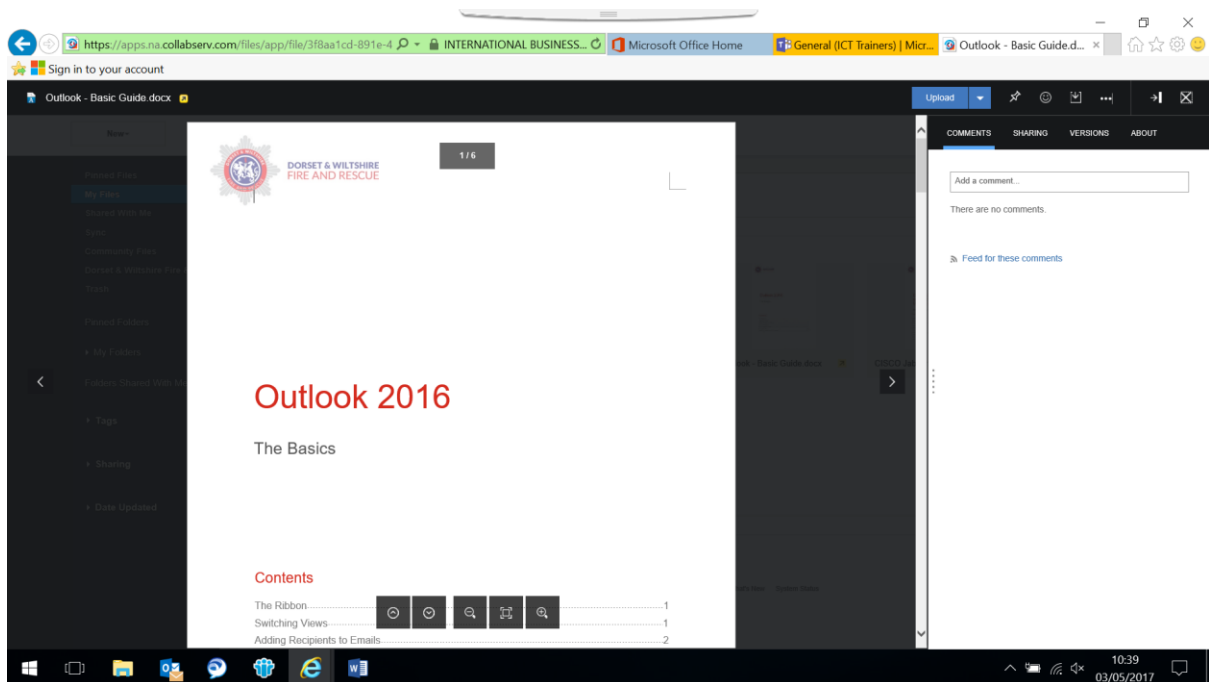
## Sharing your Files and Documents with a Community

To share your Files and Documents with a Community;

- Click on the “More” drop down menu on the menu bar, and select “Files” from the menu list. This will open your “My Files” page
- Select the file you wish to share by clicking on it

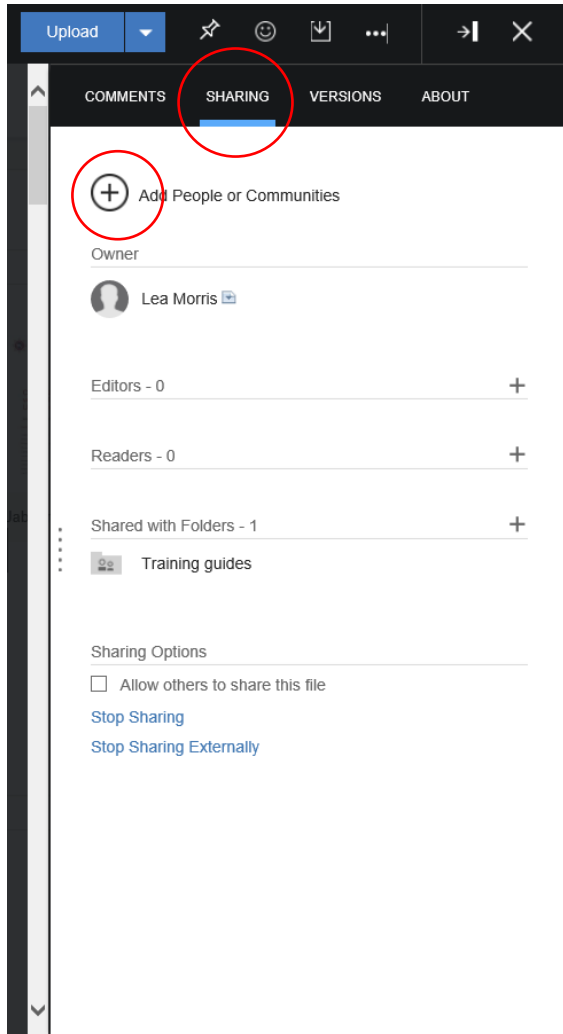


When you click on the File, it will open a new window to view and manage the file settings;



On the top right hand side, select the Sharing drop down menu. This will open the Sharing menu options;

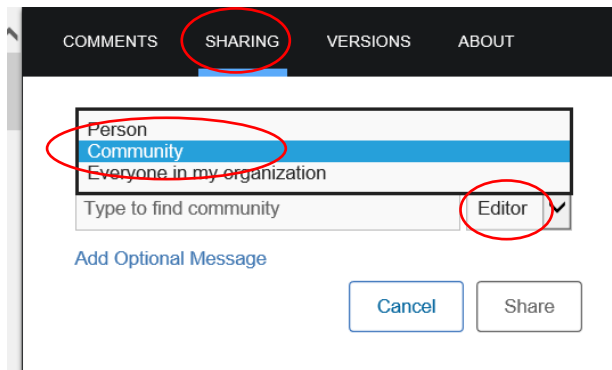
- Click on the “Add People or Communities”



This will open the Sharing selection menu.

- Select “Communities” from the drop down menu
- Select either “Editor” or “Reader” from the drop down menu;  
**Editor** – this Community will be able to edit the shared file  
**Reader** – this Community will have “view only” access to the shared file
- Type the Name of the Community you wish to share the file with. As you type, you will be shown a drop down Name list to choose that Community from.
- Click on the Community you wish to share with – the name will be added below, click on Cancel or Share as appropriate.

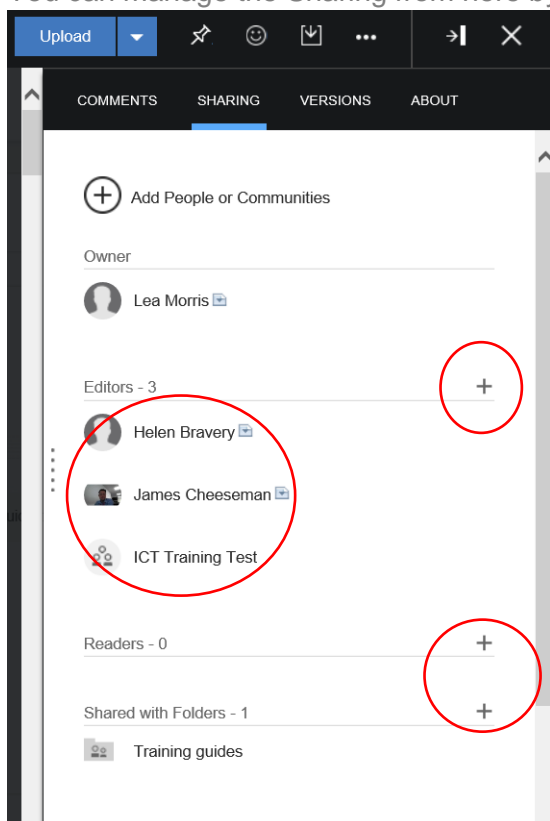
**Tip** – Select the Editor or Reader option *before* you type the Community name in, as the name and sharing access is added straight away.



Repeat these steps to share the file with additional Communities.

Once you have added a Copmmunity, the Sharing Summary window will display, to show the new Community added (e.g. the ICT Training Test Community) to the Sharing list, who else is sharing, and whether they are Editors or Readers.

You can manage the Sharing from here by clicking on the + and – symbols;



## Editing Files online

You can edit a file online in IBM Connections Docs *and* you have been given editing access to the file.

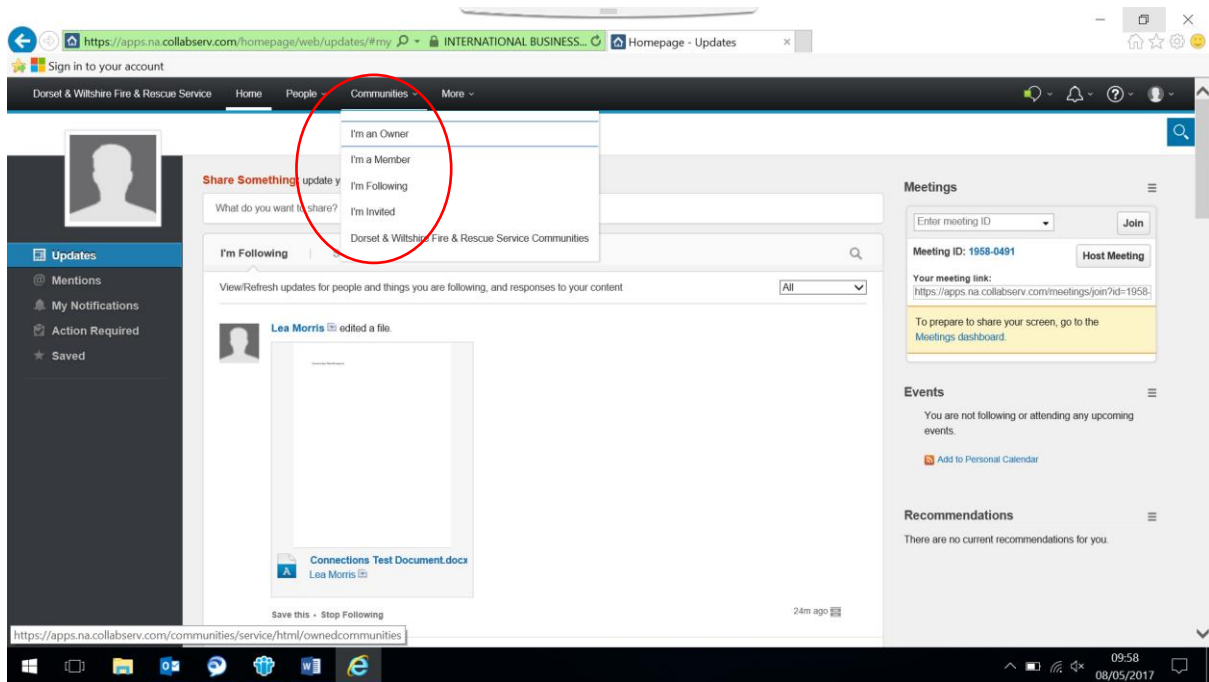
- Multiple editors on a team can edit a document at the same time online. You can edit in a different, or the same, paragraph, table, or image.



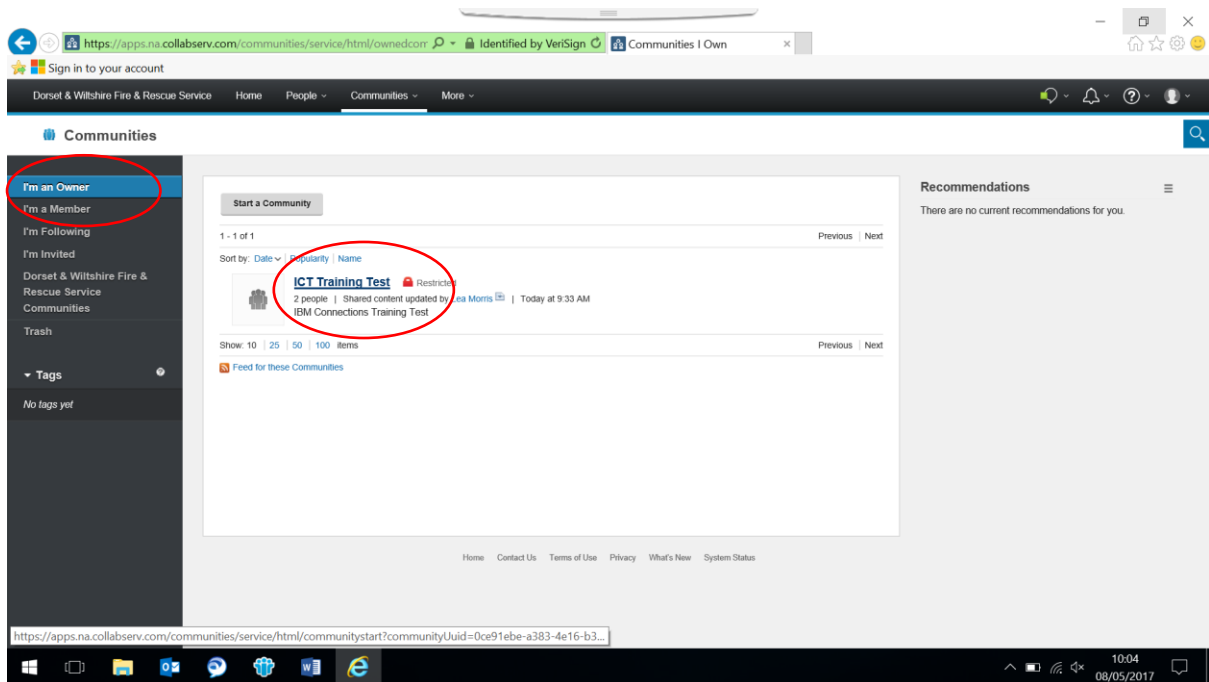
- To prevent others editing a document whilst you are working on it, you can “Lock” the file

To edit a File online;

- From the Home page, Click on the Communities drop down menu to select the Community category you wish to go to;



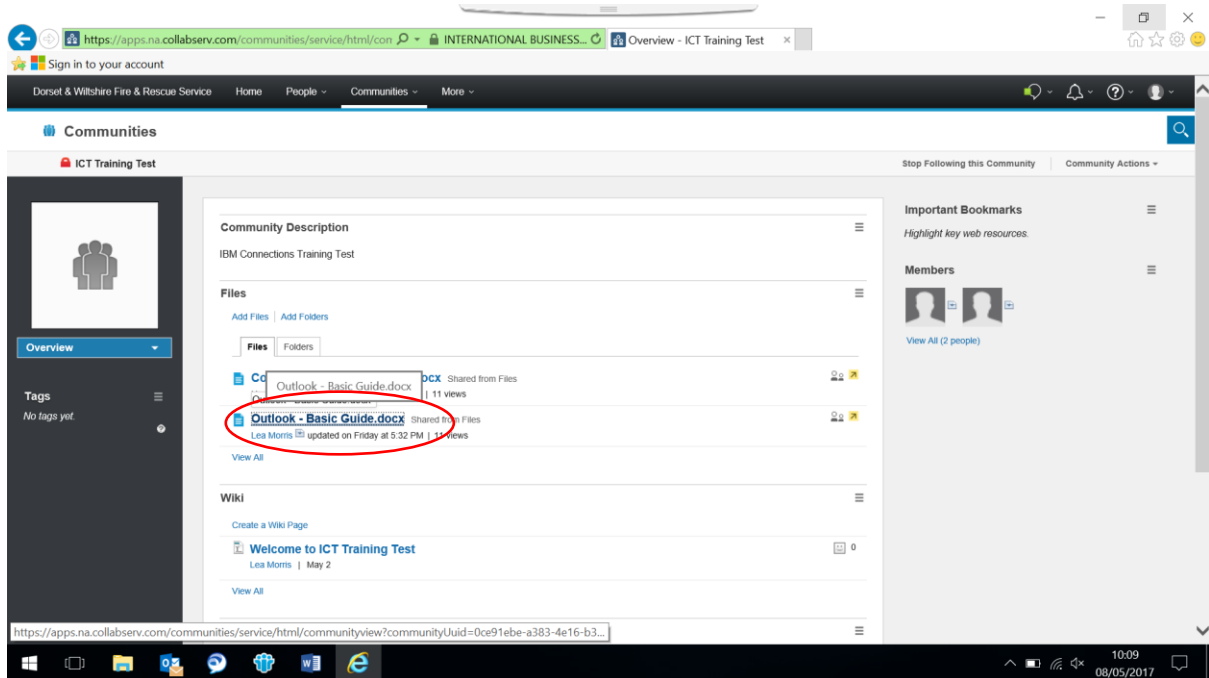
- Click on the name of the Community you wish to access





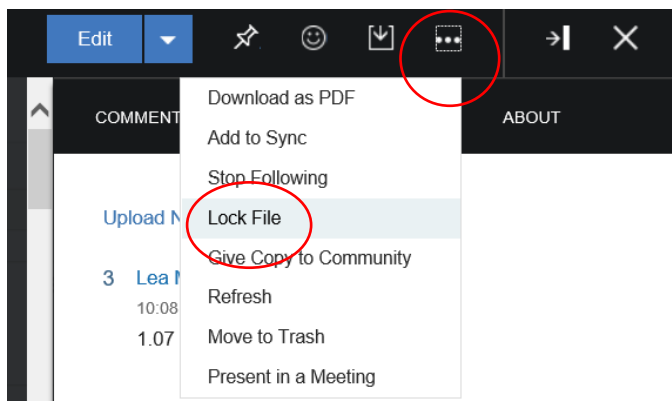
The selected Community page will open.

- Click on the file you wish to edit from the list displayed on the Community page;



The Selected File will open for viewing and editing.

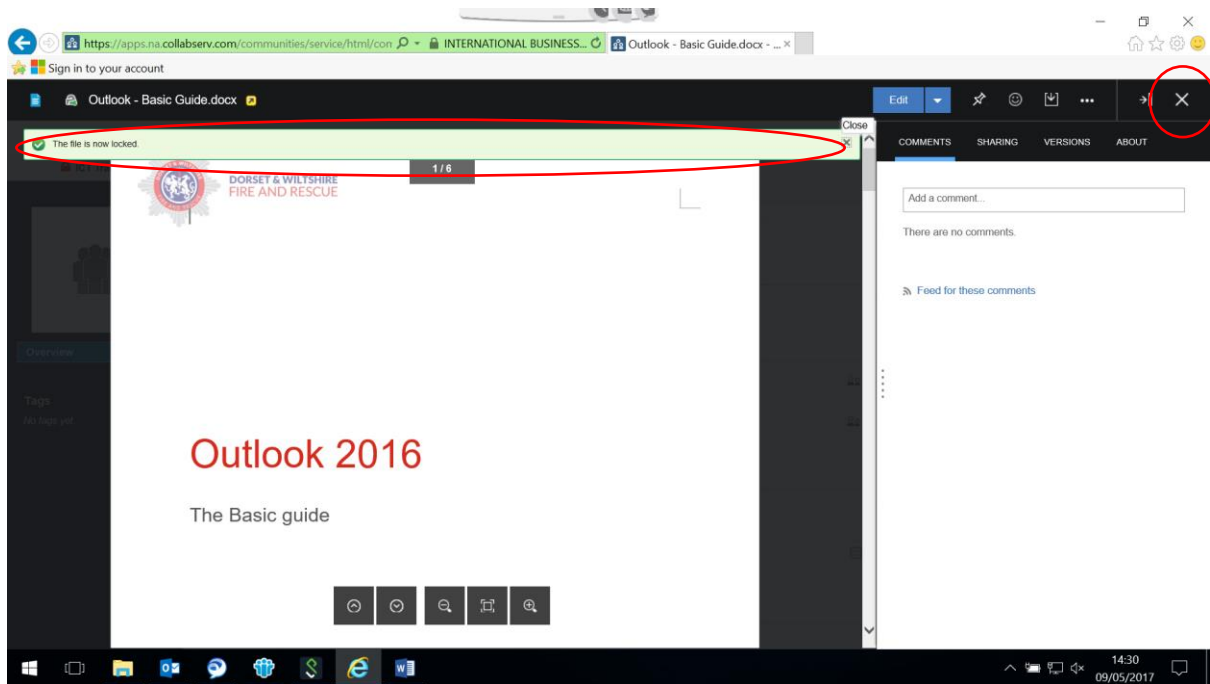
- Before you edit the file, it is good practice to Lock it, to prevent others from editing at the same time as you – *unless you have agreed with others to work on the document together at the same time*
- To Lock the file, click on the “More Actions” drop down menu button and select “Lock File”;





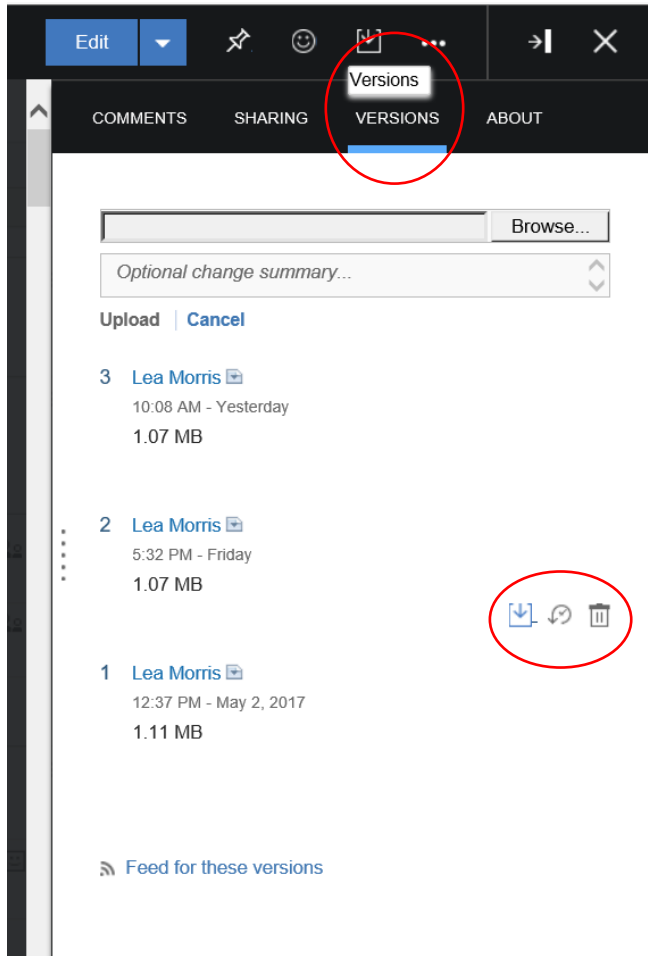


- Once the File is Locked, a message will appear in Green at the top of the page. Only you will be able to edit it, although other people in the Community will be able to view only.
- When you have finished editing the file, close it by clicking on the X button to save the changes.
- Ensure you Unlock the file once you have completed your edit, by clicking on the More Actions button drop down menu and selecting “Unlock File”

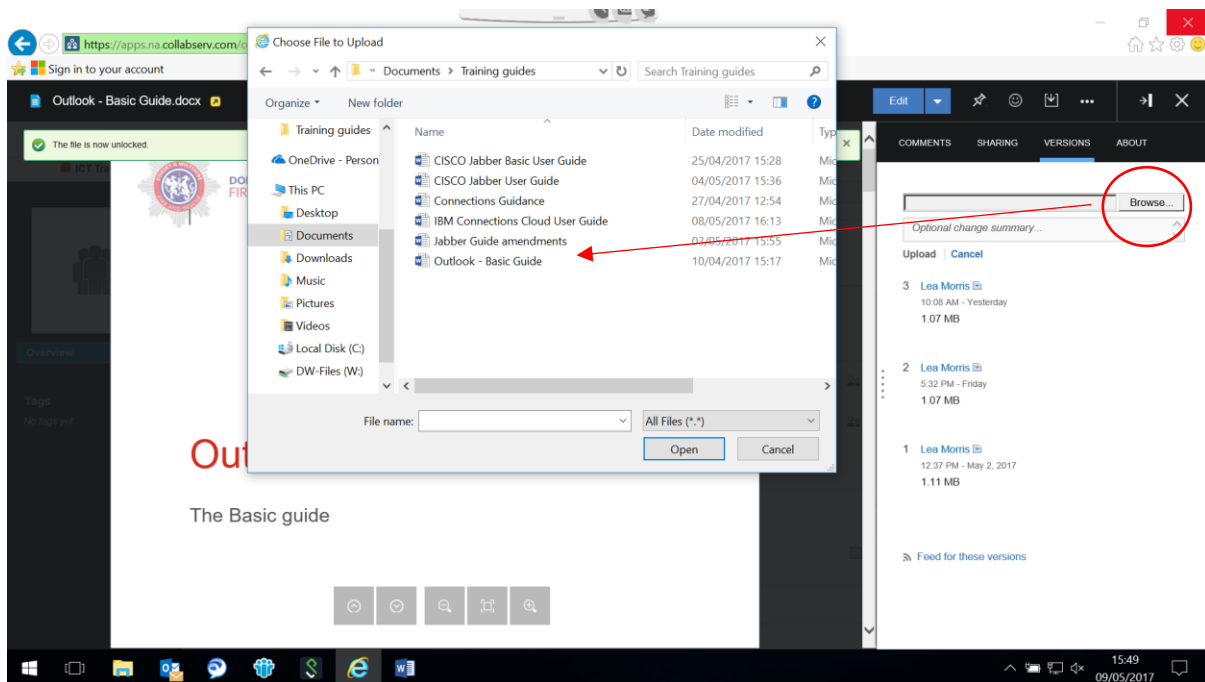


You can view the Version Summary of each File, by clicking on the Version button;

- By highlighting each version with your mouse arrow, you can either download, restore or delete individual versions of the file by clicking on the appropriate button which will appear on the right of each version



You can also upload a new version of the File from your device, by clicking on the “Browse” button and selecting the new version from the “Choose File to Upload” window;



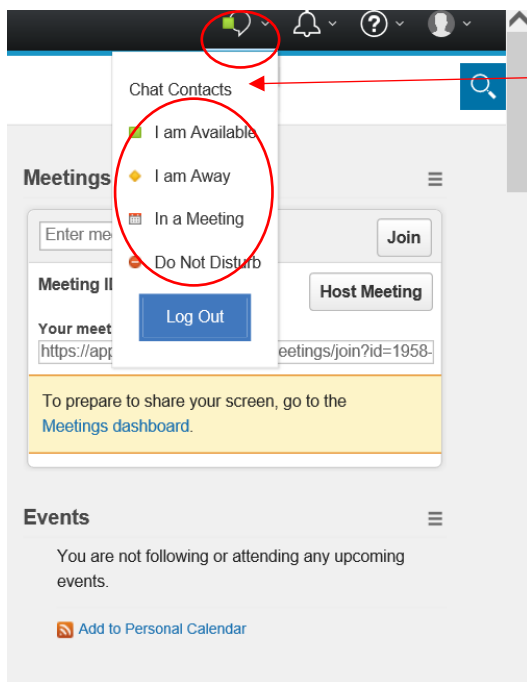


## Sametime - Live Chat

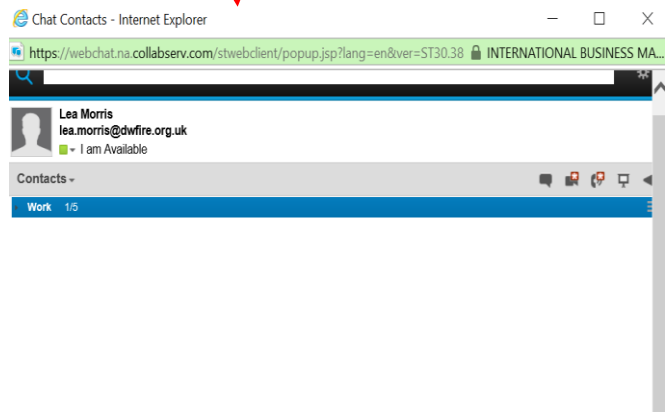
IBM Connections Chat enables you to chat directly with your Contacts either from the DWFRS Directory or your own Contacts. This helps reduce the use of e mails, and is useful where teams are geographically spread.

### To access Chat;

- Click on the “speech bubble” button to open the drop down menu
- You can change you chat status by clicking on the appropriate setting on the drop down menu to indicate your availability

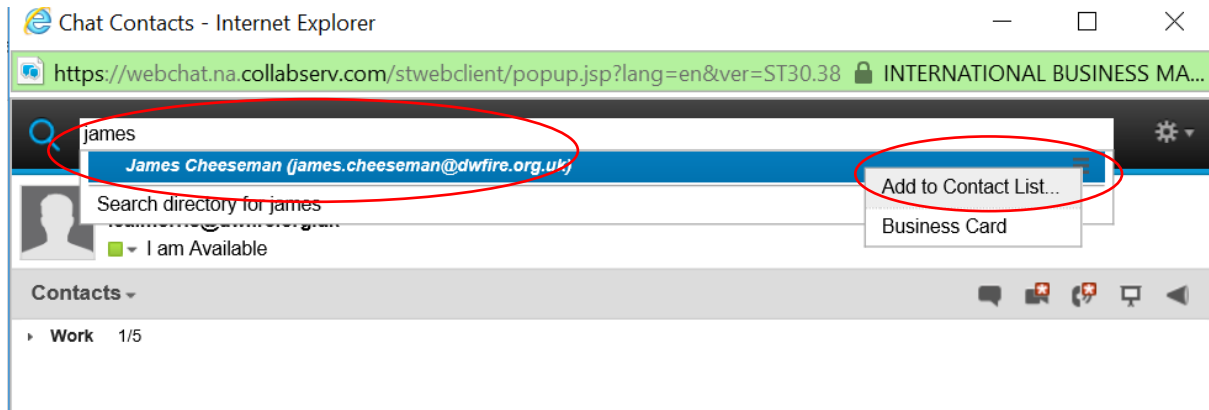


Click on “Chat contacts” to open the Chat window

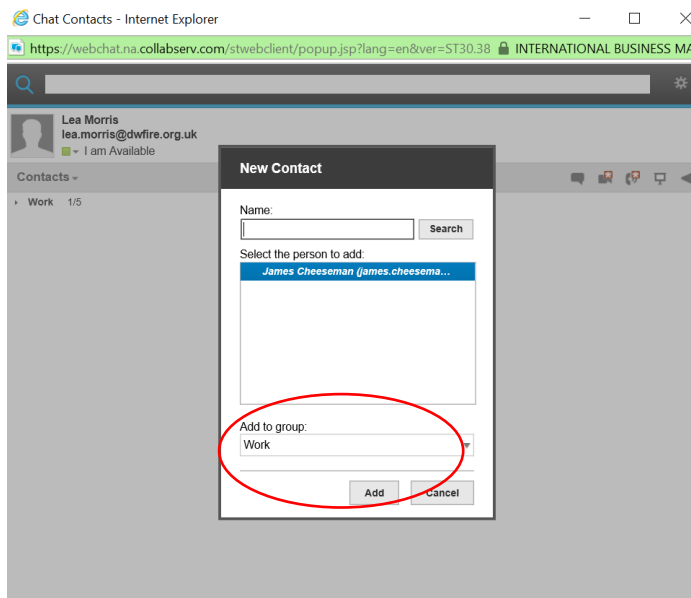


### To add a new Contact;

- Type the person’s name in the search field at the top on the page
- Select the person from the list
- Click the drop down menu on the right hand side of the Contacts name bar, then click on “Add to Contact List”
- The New Contact window will open



In the New Contact window, select which Group you wish to add the Contact to from the drop down menu;



The new Contact is added to the Work group;

- Click on the drop down arrow to open and view the Contacts in the Work group



### To add a new group;

- Click on the “Actions and Preferences” cog button and select New Group from the drop down menu

The New Group window will open;

- Type in the name of the new group
- Untick the box if you wish this to be a separate new Group
- Click “Add” to add the new group to your Groups list



## To Chat with a Contact

**Tip** – ensure that you have the Sametime desktop plug in installed on your device

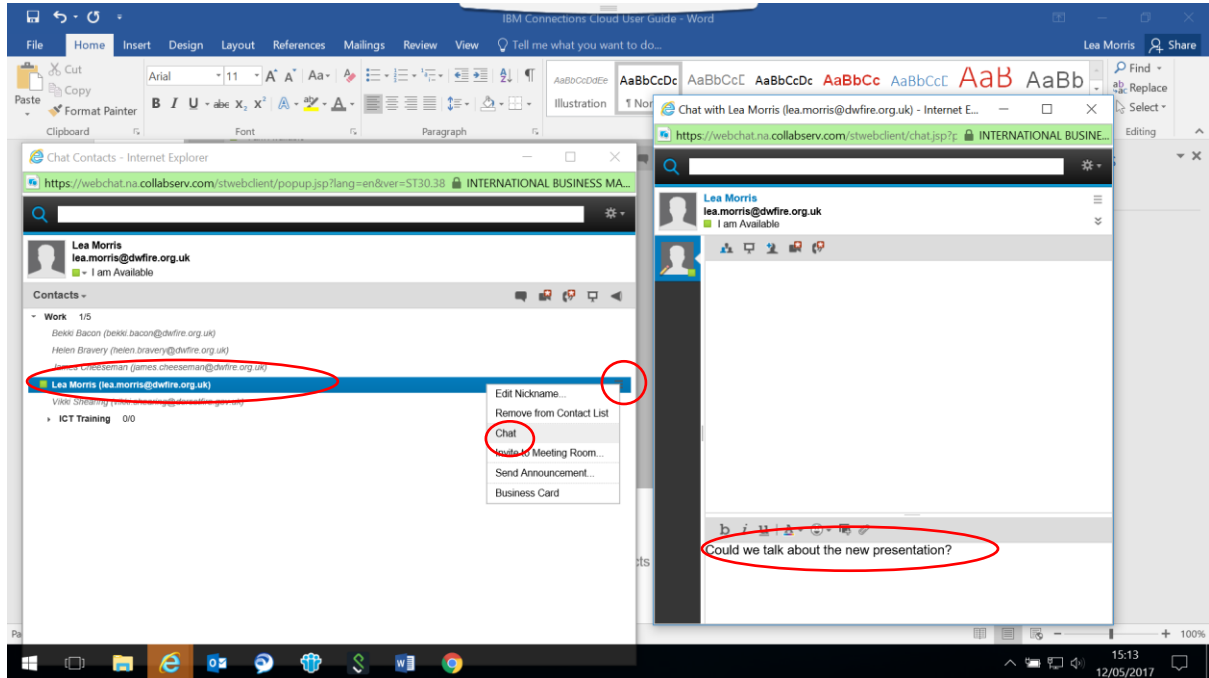
**Tip** – Remember to allow Pop ups for the Sametime live chat window to open

Where a Contact is indicated as being online and available on your Contacts list, you can send a Chat message;

- Click on the Contacts name to highlight them
- Click on the drop down menu on the right hand side and select “Chat”



- The Chat window opens separately
- Type your message in the text box at the bottom of the chat window
- Press the Enter key to send the message, which will appear on the Conversation box above



## Access IBM Connections Cloud from your mobile device

You can access IBM Connections from your mobile device by downloading the IBM Connections App from the appropriate app store, depending on whether you have an Apple or Android device;

- Click Install to download to your mobile device
- Once it is downloaded, open the App on your mobile device, enter your Connections e mail address and Password



Apps | Categories | Home | Top Charts | New Releases

My apps  
Shop  
Games  
Family  
Editors' Choice

Account  
Redeem  
Buy gift card  
My wishlist  
My Play activity  
Parent Guide

### IBM Connections

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