

nuxeo

Content Management Platform
For Business Applications

Nuxeo Social Collaboration 5.5



User Guide

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1. Social Collaboration - User Guide	2
1.1 Social workspaces overview	4
1.1.1 Creating a new social workspace	7
1.1.2 Editing a social workspace	8
1.1.3 Adding content to a social workspace	10
1.1.4 Managing a social workspace	12
1.1.4.1 Managing the workspace users	12
1.1.4.2 Setting the workspace's dashboards	16
1.1.4.3 Working with News	17
1.2 Rich user profile overview	19
1.3 Activity stream overview	20
1.4 Mini messages overview	22
1.5 Network overview	24

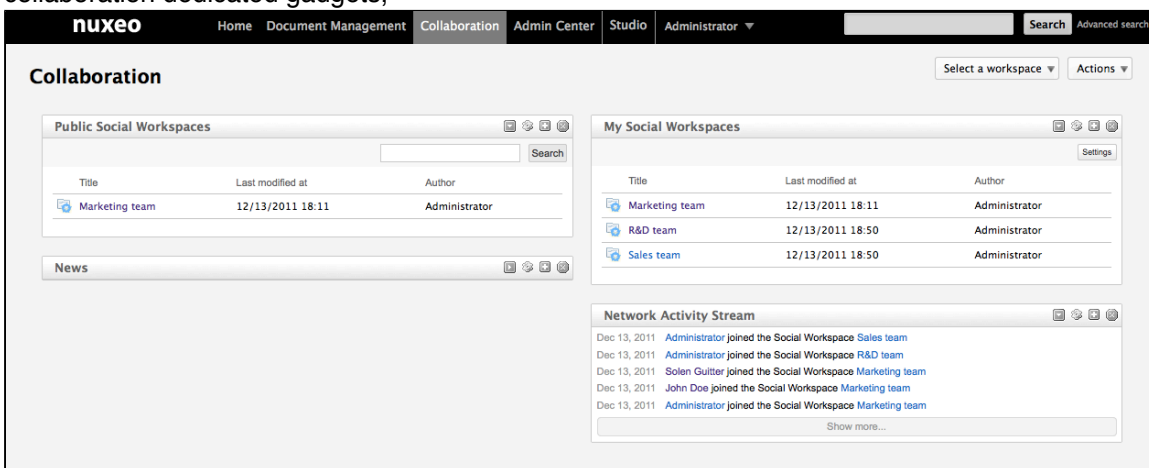
Social Collaboration - User Guide

The Social Collaboration module is a user centric and subject centric view of your Nuxeo application, with extended collaboration and social features such as relations, activity stream, mini-messages, rich user profile, etc.

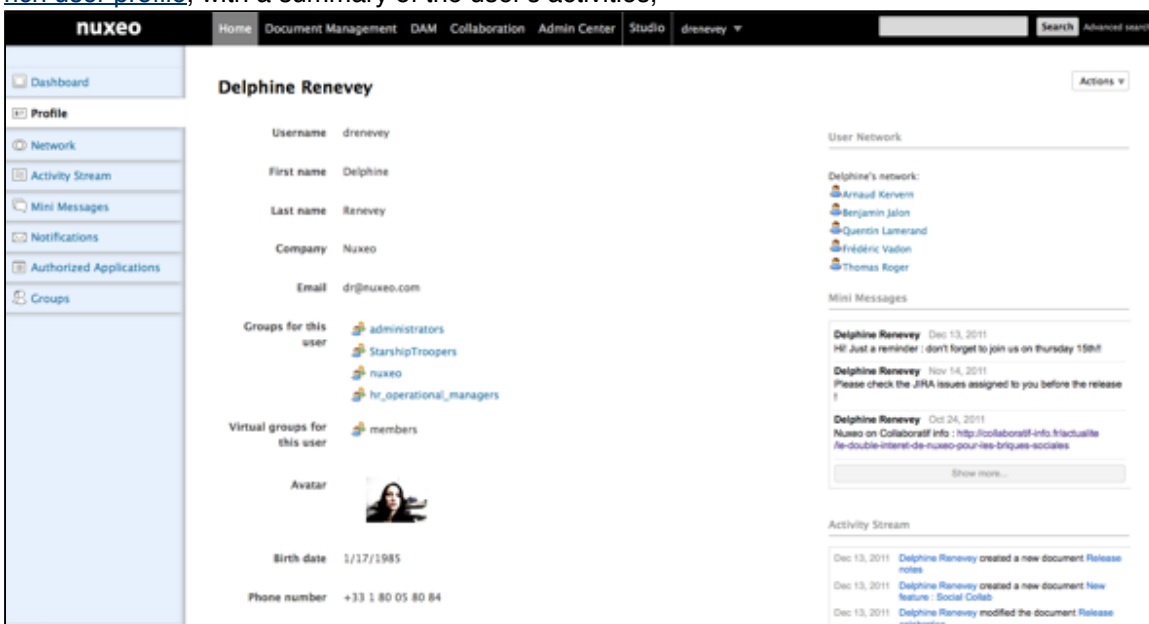
Social Collaboration is a module that you can decide to use or not, either when installing Nuxeo 5.5, or afterwards, using the Marketplace package.

The Social Collaboration module adds the following features to a document management application:

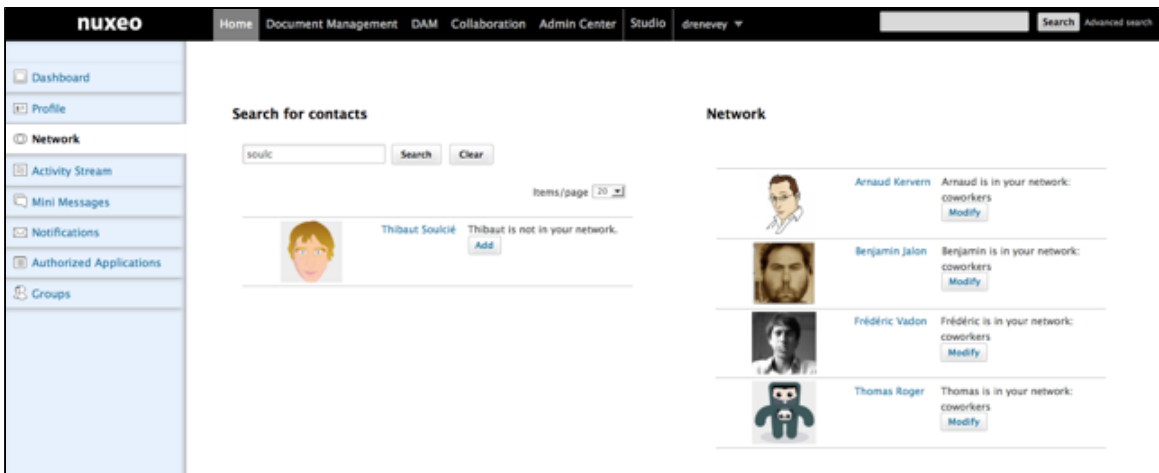
- [social workspaces](#), with [articles](#) and [news](#) documents, a dedicated tab and new dashboards with social collaboration dedicated gadgets,



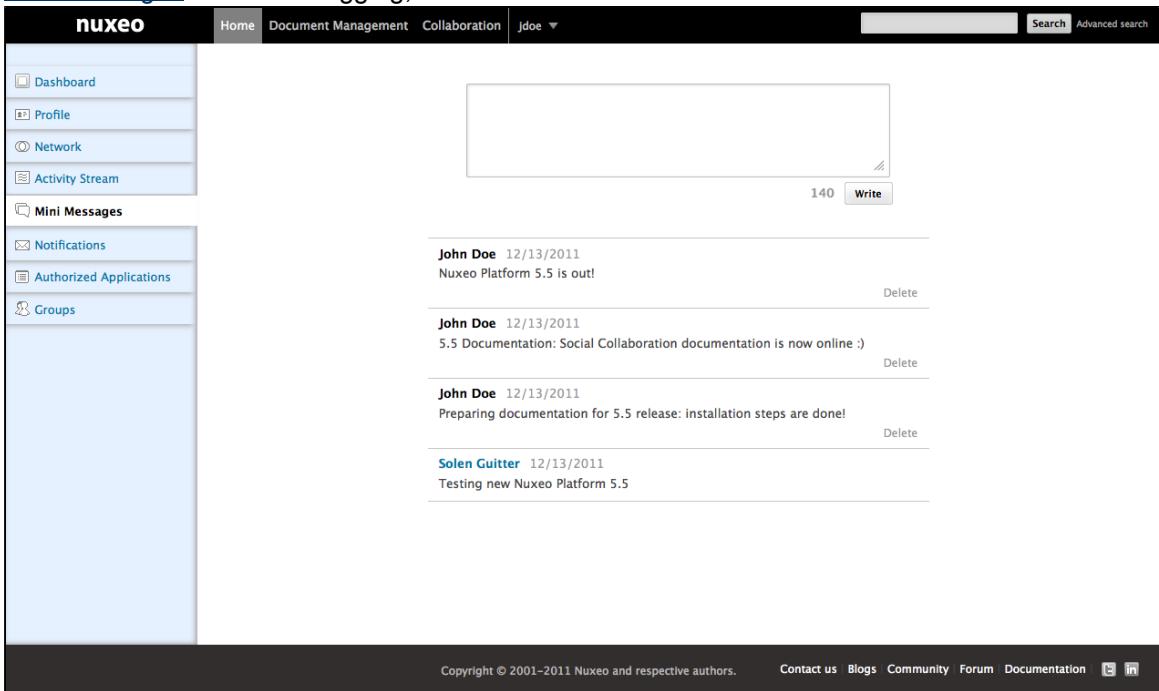
- [rich user profile](#), with a summary of the user's activities,



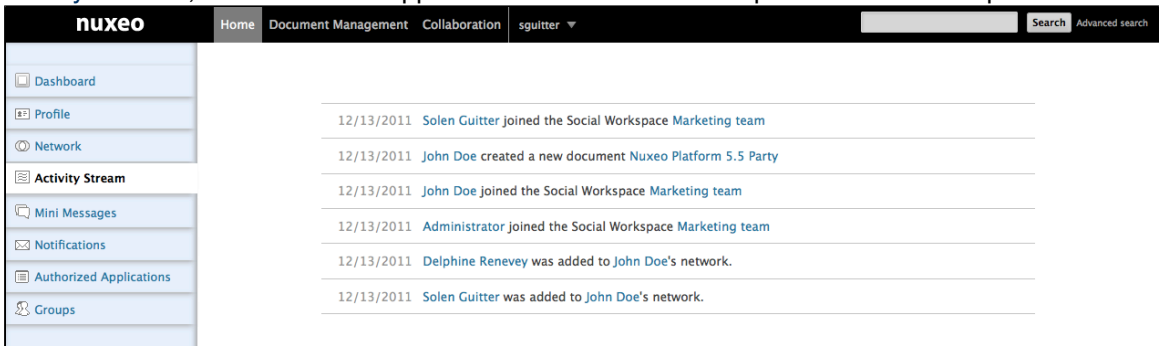
- [user's network](#), ie all the relationships of the user



• [mini-messages](#) for micro-blogging,



• [activity streams](#), to follow what happens in the user's relationships and social workspaces.



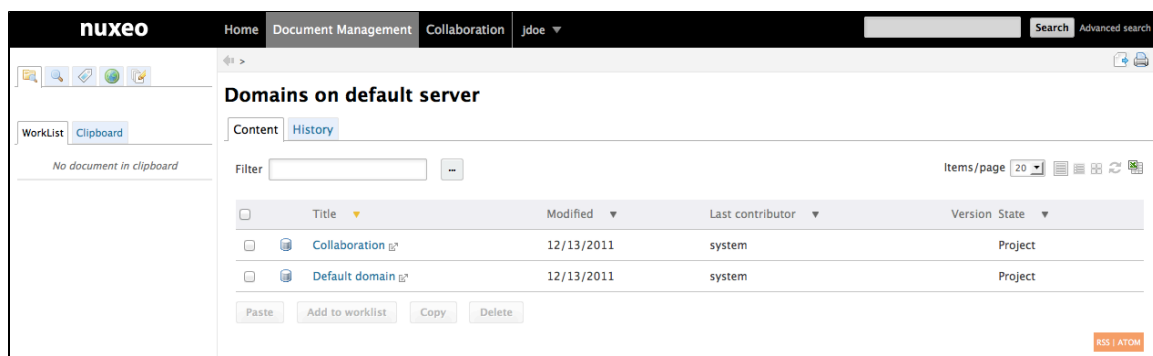
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In this User Guide

- [Social workspaces overview](#)
 - [Creating a new social workspace](#)
 - [Editing a social workspace](#)
 - [Adding content to a social workspace](#)
 - [Managing a social workspace](#)
- [Rich user profile overview](#)
- [Activity stream overview](#)
- [Mini messages overview](#)
- [Network overview](#)

The Social Collaboration module adds a new tab to the Nuxeo Platform, called **Collaboration**, and a new domain, called Collaboration as well. The Social Collaboration must be installed with the [Document Management module](#), and can be installed with the [Digital Asset Management module](#).



Social workspaces overview

Social workspaces are spaces that enable you to create content and share it to a community of users, using only the notion of private / public content.

Social workspaces have user friendly views of the content that enable users to access content simply and quickly and to share documents without having to understand all the hierarchical structure of the Nuxeo application. These views are dashboards, that can be configured by the workspace administrators to be consistent with the workspace purpose and members.

On this page

- [Social workspace visibility](#)
 - [Public workspace overview](#)
 - [Private workspace overview](#)
- [Social workspace users](#)
- [Browsing a social workspace](#)

Social workspace visibility

Social workspaces can be either private or public.

Public workspace overview

A public workspace is a space in which content can be shared to all users of the application, even if they are not

members of the workspace. Indeed, the workspace can be seen in the workspaces directory by all users. If people are interested in the workspace's topics, they can ask to join the workspace to have access to more content.

Private workspace overview

A private workspace is a space in which content can only be accessed by workspace members. Users become members of the workspace when they are invited to the workspace. They cannot join the workspace at their own initiative.

Social workspace users

There are two types of users in a social workspaces : members and administrators.

Members can:

- create content (articles),
- edit the workspace's content,
- change the visibility of articles (public / private).

Beside members actions, social workspace administrators can:

- create news,
- customize the workspace dashboards,
- manage the members of the workspace (approve join requests, add / remove members...).


Browsing a social workspace

Social workspaces display content in a user-friendly way, independent from the usual hierarchical structure of Nuxeo, publication process etc. This Collaboration view is available for social workspaces and the documents inside it. The workspace collaboration view uses dashboards, which are composed of gadgets that display content in a transparent way. The workspace's administrators can [configure dashboards](#) to display only the gadgets they think are relevant to the workspace and its users.

There are two social workspace dashboards:

- a public dashboard which is displayed to non-members,
- a private dashboard which is displayed to the members of the space.

Workspace members also have access to a classic Document Management view of the workspace, from which they can access additional document management features such as [comments](#).

You can go to the Document Management view from any Collaboration view by clicking the **Actions** button and then **Document Management view**. Conversely, you can access the Collaboration view of documents and social workspaces at anytime by clicking the icon .

In the Collaboration tab, you can easily browse content, without having to know where the content is in the collaboration structure. For instance, you can:

- access all the articles of the social workspace:

The screenshot shows the Nuxeo Collaboration interface for 'Articles Collaboration'. The user 'jdoe' is logged in. The page displays four news items:

- 5.5 Release announcement**: Welcome to the new version of the Nuxeo Content Management Platform, a major step forward in how organizations develop their business applications. With the Nuxeo Platform 5.5, we've transformed the way organizations develop and run content-centric applications, offering the best of all worlds for end users, developers and business owners. (Dec 14, 2011 jdoe)
- New feature : Social Collab**: It's Time for Social Collaboration! Nuxeo Platform 5.5 includes a brand new collaboration module. Inspired by the best elements of the social network experience, this module provides a user- and subject-centric view of your content, enabling collaborative project management. (Dec 14, 2011 jdoe)
- Enterprise Content Management Goes Mobile**: The Nuxeo Platform 5.5 offers improved support for users and developers of mobile applications. The platform architecture and APIs have been optimized, to offer a reliable back end for mobile content applications. The Platform also features a new Android SDK which, on the client side, makes it possible to quickly develop the most challenging mobile content-centric applications. And, like always with the Nuxeo Platform, we made it simple not only to develop, but also to maintain and run, to ensure the best experience for developers as well as the best value for businesses! (Dec 14, 2011 jdoe)
- A Wide Range of Core Improvements to the Nuxeo Platform**: Not surprisingly, this new version of the Nuxeo Platform, like each and every new version, comes with a large set of core improvements. Our R&D team dedicated a large part of the development time not only on developing new features, but also on improving and enhancing the existing features and the core components of the platform. With 5.5, core improvements cover all areas of the platform, from the look and feel to the content repository; from the packaging to the underlying system stack. This makes the Nuxeo Platform, now more than ever, the best unified platform for application builders to use to develop their applications. It provides a large set of generic modules, now in a unified package, while also offering a homogeneous, consistent platform to customize and extend. (Dec 14, 2011 jdoe)

At the bottom, a blue banner states: "This Nuxeo Instance is not registered to Nuxeo Connect: you won't be able to get the most recent fixes and stay up to date. Nuxeo version: 5.5. Register and enable Nuxeo Connect to benefit from automatic maintenance." Links for "How to enable Nuxeo Connect" and "Subscribe to Nuxeo Connect" are provided. The footer includes copyright information and navigation links: Contact us, Blogs, Community, Forum, Documentation, and social media icons.

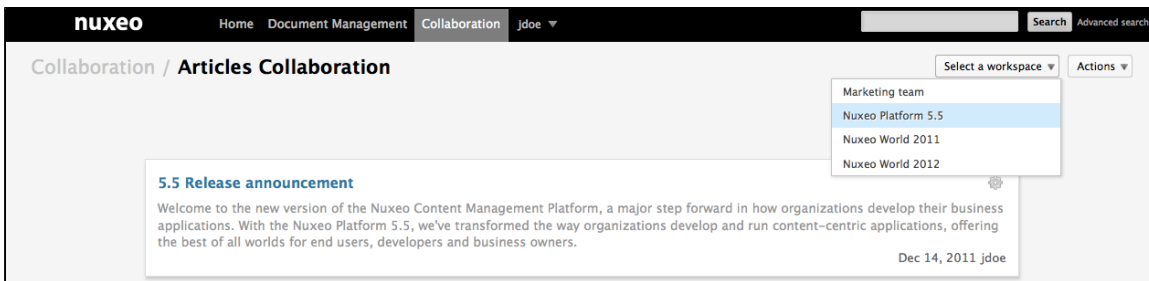
- access all the news of the workspace:

The screenshot shows the Nuxeo Collaboration interface for 'News items Collaboration'. The user 'sguitter' is logged in. The page displays two news items:

- The marketing team invites to a 5.5 party!**: Come and celebrate Nuxeo Platform 5.5. (Dec 14, 2011 sguitter)
- Coming white papers**: The list and details on the next white papers that will be published. (Dec 14, 2011 sguitter)

The bottom banner and footer are identical to the previous screenshot, including the Nuxeo Connect notice and navigation links.

- go to another social workspace.



The available actions are displayed on the top right corner of the social workspace view. You can:

- select another social workspace (only the workspaces you're a member of are displayed),
- create and edit content,
- go to the articles of your social workspace,
- go to the news of your social workspace.

Related pages:

[Social workspaces overview](#)

[Editing a social workspace](#)

[Creating a new social workspace](#)

Creating a new social workspace

Social workspaces can only be created in the Social domain added automatically by the system when you install the Social Collaboration module to your Nuxeo application.

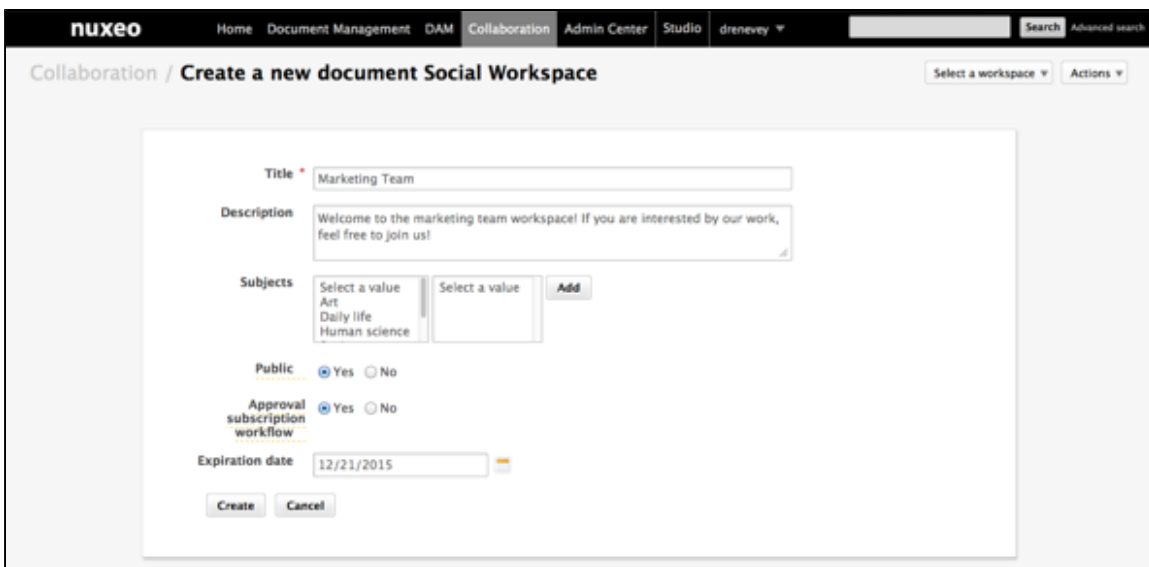
To be able to create a new social workspace

You can create social workspace from:

- the Collaboration tab, from any social workspace's dashboard,
- the document management view of the social domain.

To create a new social workspace from the Collaboration tab:

1. Click on the **Action** button, in the top right corner of the view.
2. Click on **Create a Social Workspace**.
The social workspace creation form is displayed.
3. Fill in the form (see below for social workspace parameters) and click on the **Create** button.



The workspace's **Private dashboard** tab is displayed, so you can [configure the workspace's dashboards](#).

To create a social workspace from the document management view of the application:

1. In the Social domain, click on the **New** button.
2. On the **Available document types** window, click on Social Workspace.
3. Fill in the social workspace creation form.
4. Click on **Create** button.

The workspace's **Private dashboard** tab is displayed, so you can [configure the workspace's dashboards](#).

Social workspace properties

Field	Description
Title	Name of the social workspace.
Description	Text that explains what the social workspace is about.
Subject	Topic(s) of the social workspace.
Public	Indicate if the social workspace is public or private.
Approval subscription workflow	For public workspaces : indicates if join request should be approved by a workspace administrator or automatically.
Expire on	Date at which the social workspace can be closed by an administrator.

Related pages:

[Social workspaces overview](#)

[Editing a social workspace](#)

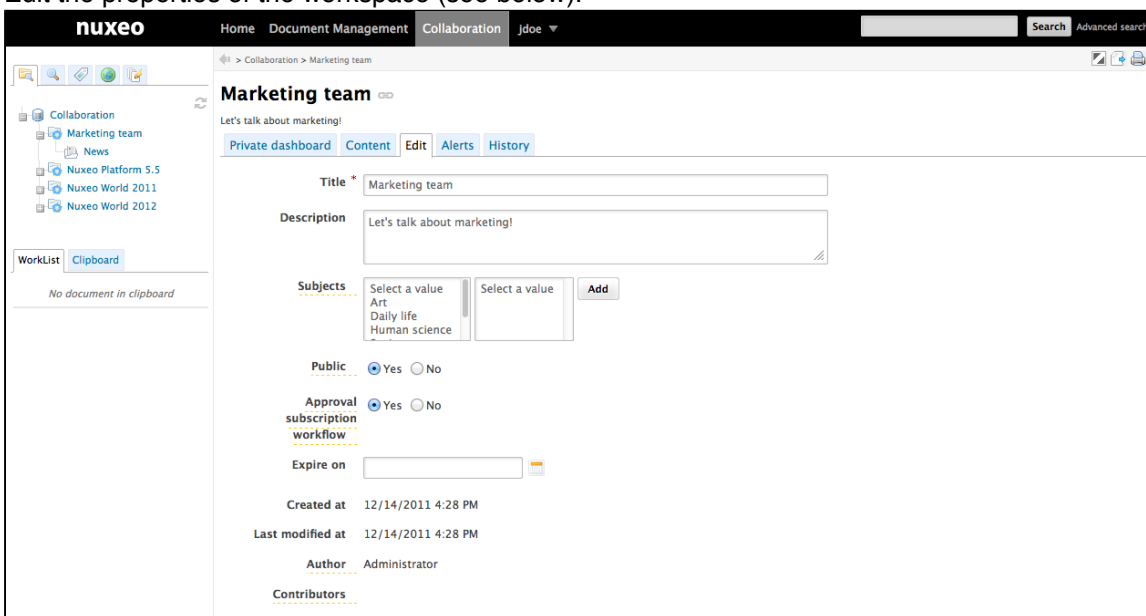
[Creating a new social workspace](#)

Editing a social workspace

Social workspaces can be editing from the document management view only.

To edit a social workspace:

1. If you're on the dashboard of the social workspace, click on the **Actions** button and then on **Document Management view**.
The **Private dashboard** tab of the social workspace is displayed.
2. Click on the **Edit** tab.
3. Edit the properties of the workspace (see below).



4. Optionally, type a comment indicating what you changed on the social workspace or why you edited it.
5. Click on **Save**.
The modifications are saved.
The **Private dashboard** tab of the social workspace is displayed.

Social workspace properties

Field	Description
Title	Name of the social workspace.
Description	Text that explains what the social workspace is about.
Subject	Topic(s) of the social workspace.
Public	Indicate if the social workspace is public or private.
Approval subscription workflow	For public workspaces : indicates if join request should be approved by a workspace administrator or automatically.
Expire on	Date at which the social workspace can be closed by an administrator.

Related pages:

[Social workspaces overview](#)

[Editing a social workspace](#)

[Creating a new social workspace](#)

Adding content to a social workspace

The members of a social workspace can create and edit content in the workspace.

The documents that can be create in a social workspaces are:

- files,
- articles,
- folders.

i The administrators of the social workspace can also create [News](#).

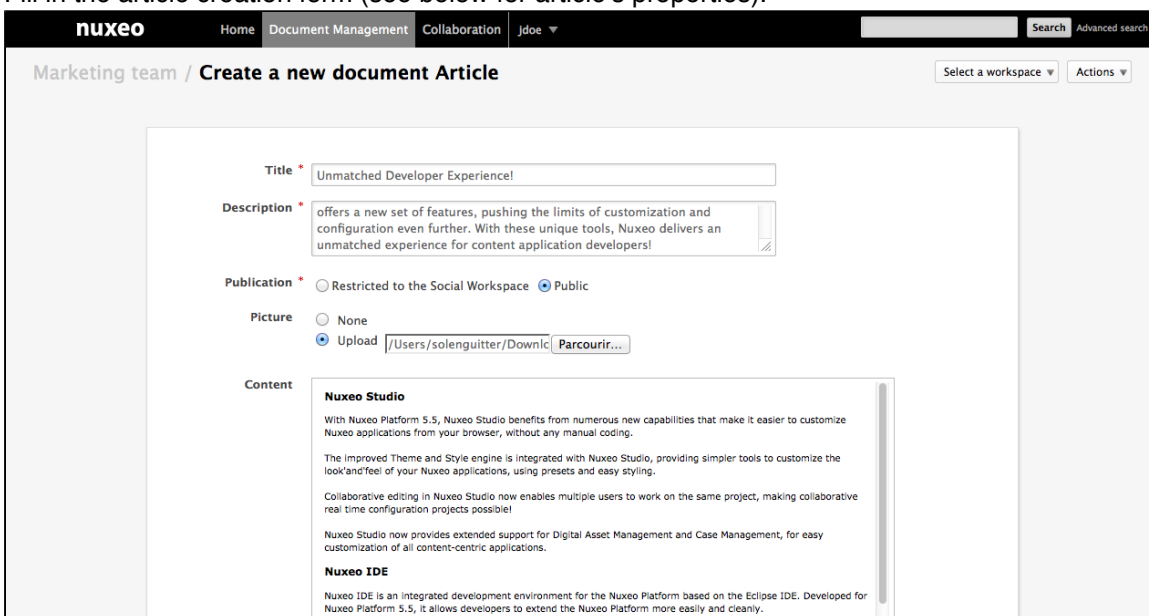
Articles are the main document type in social workspaces. All documents can be created either from the collaboration view or the document management view.

There are several ways to create articles:

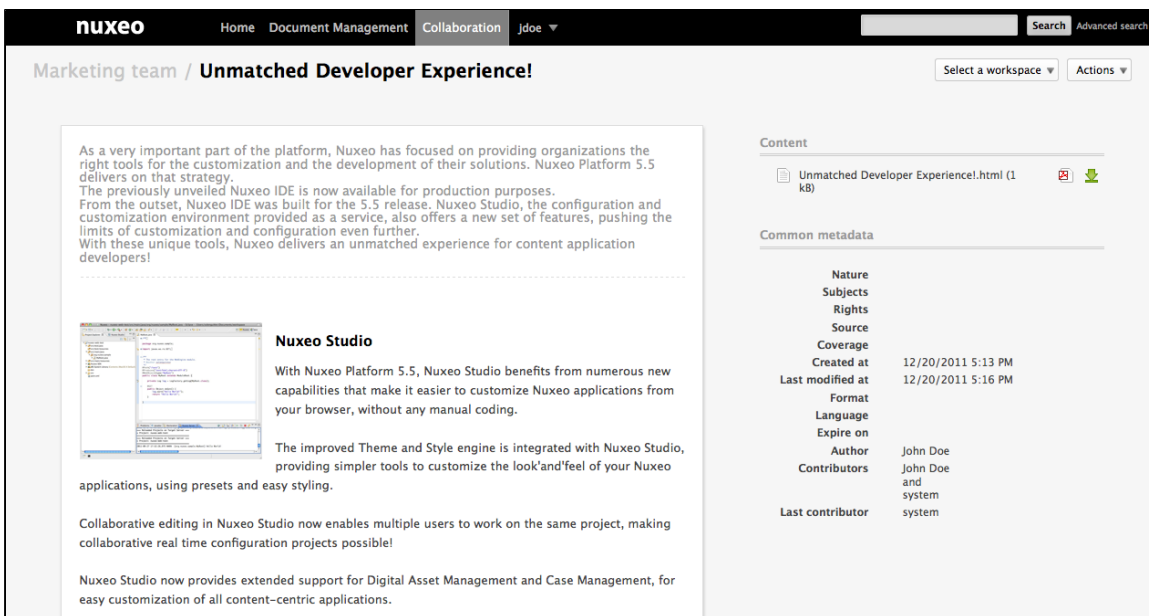
- [using the complete creation form](#),
- [using the quick creation form the workspace's dashboard](#),
- [using the regular document management interface](#).

To create an article using the complete form:

1. From the dashboard of the social workspace or an article, click on the **Actions** button.
2. Click on **Create an article**.
3. Fill in the article creation form (see below for article's properties).



4. Click on **Create**.
The article's collaboration view is displayed.



Article properties

Field	Description
Title	Name of the article
Description	Summary of the article. This description is displayed in the gadgets.
Publication	For public workspaces. Select who should see the article : only the space members (Restricted to the Social Workspace) or all users (public).
Picture	Upload an image to illustrate your article.
Content	Type the content of your article.
Format	Select which format should be used for the article.

To create a new document quickly from the dashboard:

i Pre-requisite

The dashboard must display the **Document library** gadget.

This view is intended to facilitate the creation of files. However, you can follow the same steps to create Articles, Files or Folders.

1. On the dashboard's Document library gadget, click on the icon .
2. Click on **File**
The file creation form is displayed in the gadget.

The screenshot shows a 'Document Library' window with the title 'Create a document File in "Marketing team"'. It contains a form with three main sections: 'Title *' with the text 'anagement Platforms White paper', 'Description' with the text 'The white paper about Content management platforms', and 'Content' with the text '/Users/solenguitter/Downk'. There is a 'Parcourir...' button next to the content field. At the bottom of the form are 'Create' and 'Cancel' buttons.

3. Fill in the title, description and content.
4. Click on the **Create** button.
The file is created and displayed in the Document library gadget.
By default, the file is private. You can edit the article to add a picture.

To create a new document in a social workspace, from the Document Management view:

1. In the Document Management view, click on the **Collaboration** domain.
2. Click on the social workspace you want to create a new document in.
3. In the **Content** tab of the workspace, click on the **New** button.
4. On the window **Available document types**, click on the desired document.
5. Fill in the document's creation form.
6. Click on the **Create** button.
The **Summary** tab of the document is displayed.

Managing a social workspace

The administrators of the social space can:

- [manage the members of the space](#),
- [set up the social space dashboards](#),
- [share news to the workspace's members](#)

Managing the workspace users

Social workspaces can be either private or public.

On public workspaces, users can ask to join the workspace to have access to more content and share articles on the workspace. The workspace administrators must then validate these join requests.

On private workspace, users have no access to the workspace unless they are a member. As a consequence, they cannot ask to join it. Only the space administrators can add new members to the workspace.

The members management actions all take place in the Document Management view.

On this page

- [Adding members to a social workspace](#)
 - [Adding members individually](#)
 - [Adding several users using email addresses](#)
 - [Adding groups of users](#)
- [Managing join requests](#)

Adding members to a social workspace

Administrators can add new members to a workspace on both public and private workspaces, at anytime.

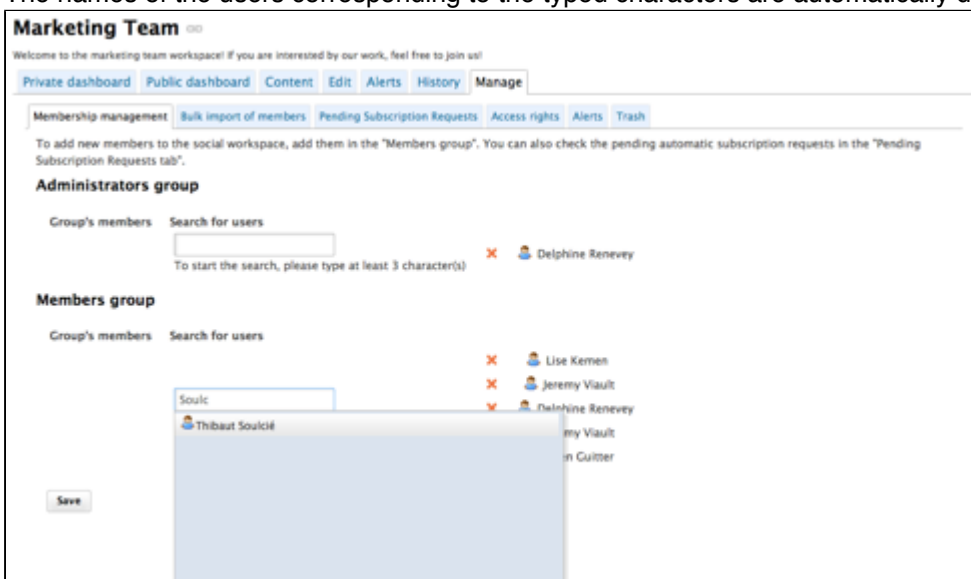
There are several ways to add new members to a social workspace:

- [you can add users one by one,](#)
- [you can import several users using their email address,](#)
- [you can add groups of users.](#)

Adding members individually

To add new members one by one:

1. On the Document Management view of the social workspace, click on the **Manage** tab. The **Membership Management** subtab is displayed.
2. In the Members group, type the name of the user you want to add. The names of the users corresponding to the typed characters are automatically displayed as you type.

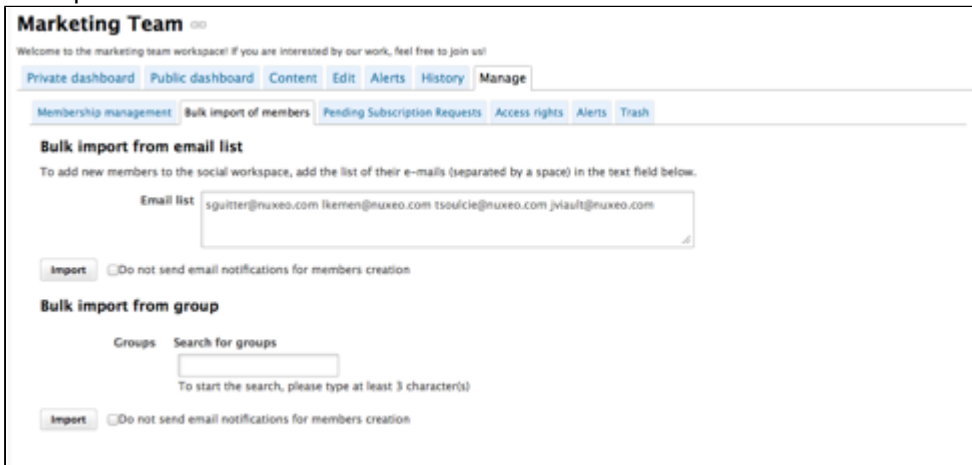


3. Click on the user you want to make a workspace member. The user is added on the right of the search form.
4. Click on the **Save** button. The user now sees the workspace displayed in his gadget **My social workspaces** and can add and edit content in the social workspace. The other members of the workspace receive an email, informing them that new members have joined the workspace.

Adding several users using email addresses

To add users using their email address:

1. On the Document Management view of the social workspace, click on the **Manage** tab. The **Membership Management** subtab is displayed.
2. Click on the **Bulk import of members** tab.
3. In the **Bulk import from email list** section, type the email addresses of the users you want to add to the workspace.



4. Check the box **Do not send email notifications for members creation** if you don't want user to be notified by email that you added them on the workspace.
5. Click on the **Import** button.

The users are added to the members of the workspace in the **Membership management** tab. The users now see the workspace displayed in their gadget **My social workspaces** and can add and edit content in the social workspace.

The other members of the workspace receive an email, informing them that new members have joined the workspace.

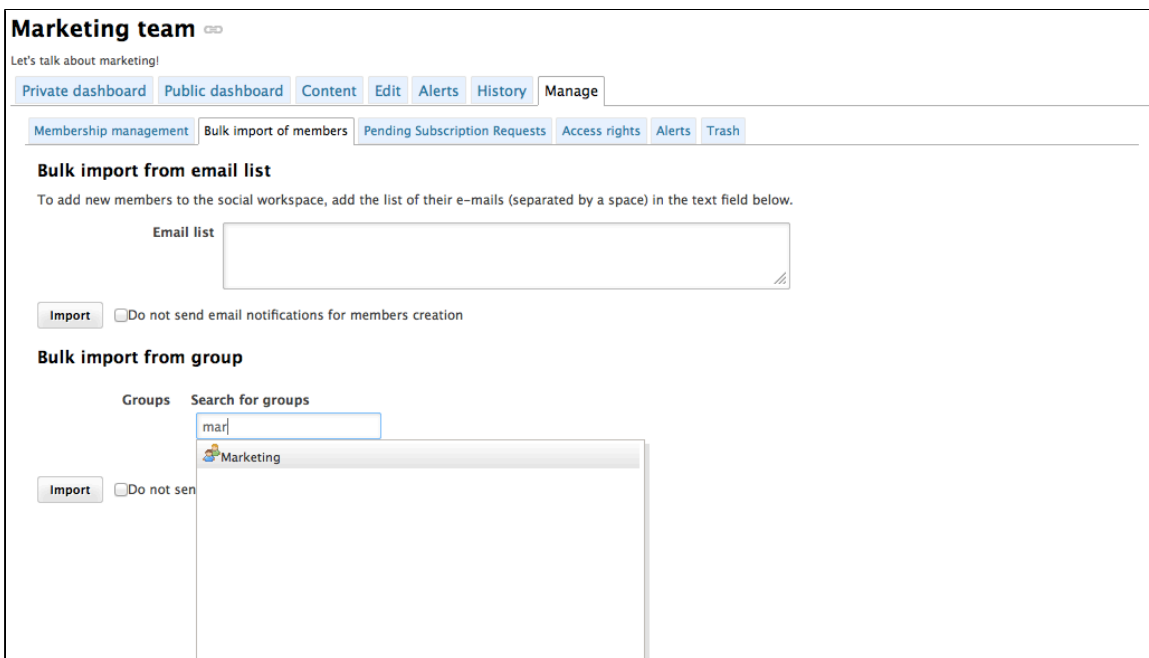
Adding groups of users

It is possible to give access to [groups of users](#) in a single step.

To add groups of users:

1. On the Document Management view of the social workspace, click on the **Manage** tab. The **Membership Management** subtab is displayed.
2. Click on the **Bulk import of members** tab.
3. In the **Bulk import from group**, type the name of a group.

The names of the groups corresponding to the typed characters are automatically displayed as you type.



4. Click on the group whose members you want to add on the workspace. The group is added on the right of the search box.
5. Click on the **Import** button. The group members are added to the members of the workspace in the **Membership management** tab. The users now see the workspace displayed in their gadget **My social workspaces** and can add and edit content in the social workspace. The other members of the workspace receive an email, informing them that new members have joined the workspace.

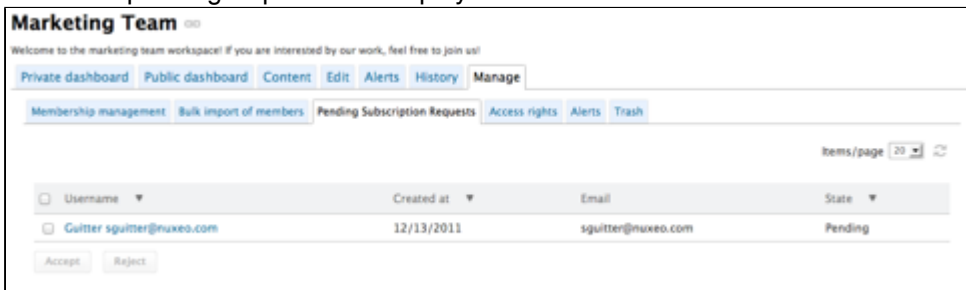
Managing join requests

On public workspaces, user can ask to join the workspace. If the social workspace has an approval subscription workflow enabled, the administrators of the workspace must approve the request so users actually become members of the workspace.

✓ The public dashboard of the workspace must display the **Join Us** gadget to enable users to ask to join the workspace.

To process subscription requests:

1. # On the Document Management view of the social workspace, click on the **Manage** tab. The **Membership Management** subtab is displayed.
2. Click on the **Pending Subscription Requests**. The list of pending requests are displayed.



3. Check the box corresponding to the users whose request you want to process.

4. Click on the **Accept** or **Reject** button.

The users are added to the members of the workspace in the **Membership management** tab. The users now see the workspace displayed in their gadget **My social workspaces** and can add and edit content in the social workspace.

The other members of the workspace receive an email, informing them that new members have joined the workspace.

Related pages

[Social workspaces overview](#)

[Managing groups](#)

[Editing a social workspace](#)

[Creating a new social workspace](#)

[Managing users](#)

Setting the workspace's dashboards

The Social Collaboration module adds new dashboards to the user dashboard in the Home tab, which are specifically design to enable the user to browse, create and share content without having to understand the hierarchical structure of the Nuxeo platform, the publishing process, etc.

The social collaboration dashboards are:

- The Collaboration root dashboard: the dashboard displayed when you click on the **Collaboration** tab. It gives an overview of the available content in the Collaboration part of the application. This dashboard can be customized by the application administrators.
- The social workspaces public dashboard: the dashboard that is displayed to non-members of public social workspaces. Its purpose is to enable sharing of public articles (using the **Public articles** gadget) so that users interested in joining the social workspace to access more content can ask to join (using the **Join Us** gadget). This dashboard can be customized by the social workspace administrators.
- The social workspaces private dashboard: the dashboard displayed only to the workspace members. It usually displays the **Document library** gadget which enables users to browse the content of the social workspace or search for content in the social workspace. This dashboard can be customized by the social workspace administrators.

The user Home dashboard is also automatically updated by the system to display some Collaboration gadgets and provide an overview of Collaboration activities (network mini-messages, your social workspaces, social workspaces news overview...).

On this page
<ul style="list-style-type: none"> • Setting up your social workspace dashboards • Setting up the Collaboration domain dashboard

Setting up your social workspace dashboards

Social workspaces come with default public and private dashboards. However, the administrators of the social workspace can customize the workspace's dashboards from the Document Management view, following the same steps as to [customize their personal dashboard](#).

Setting up the Collaboration domain dashboard

The Collaboration domain also comes with a default dashboard, that the application's administrators can customize from the Collaboration view. They can [change the dashboard layout](#), [add or remove gadgets](#), [move them](#) just like

they can on the user dashboard.

Related pages:

[Managing dashboards](#)

[Changing content presentation](#)

[Accessing content](#)

Working with News

News items are articles that enable the social workspace administrators to share information to the workspace's members. The news items are displayed in a dedicated gadget, that can be used in both social workspace dashboards, and in the user's home dashboard. Like articles, news items can be either private (visible to the space members only) or public (visible to all users).

News are automatically displayed on the different dashboards of users, providing that they display the **News** gadget:

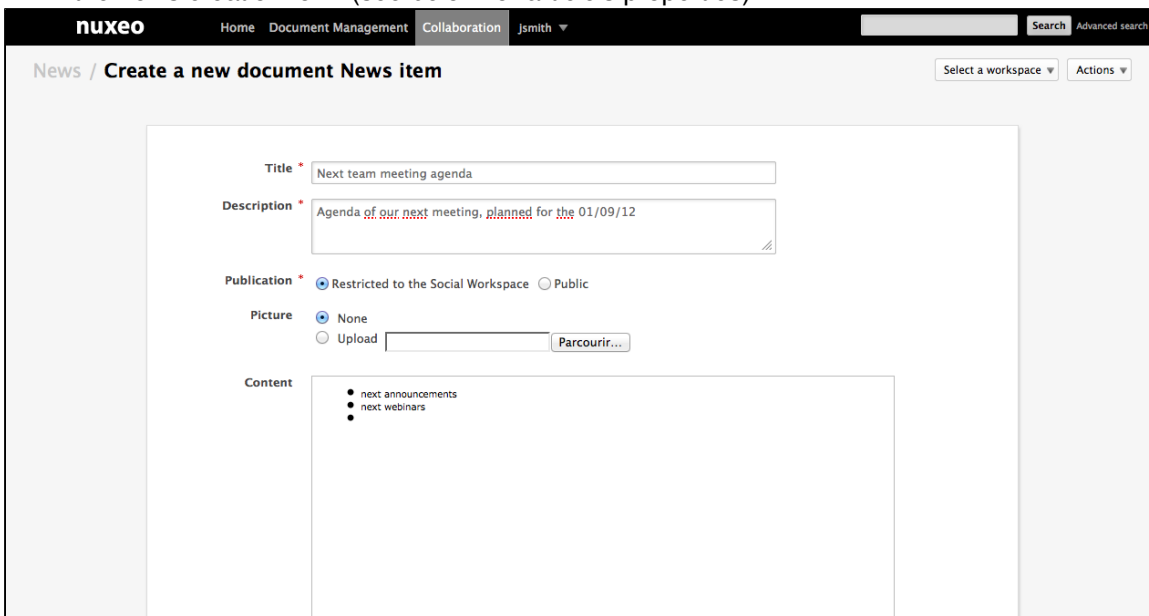
- the Home dashboard displays the news of all the social workspaces users can access,
- the Collaboration home dashboard displays the news of all the social workspaces users can access,
- the social workspaces dashboard display the news of the workspace only.

News items can only be created by the workspace administrators. They can be created from:

- [from any page in the Collaboration view using the Actions menu,](#)
- [from the workspace dashboard using the **Document Library** gadget,](#)
- [from the Document Management view.](#)

To create a news item from any page:

1. From the dashboard of the social workspace, an article or a news item, click on the **Actions** button.
2. Click on **Create a news item**.
3. Fill in the news creation form (see below for article's properties).



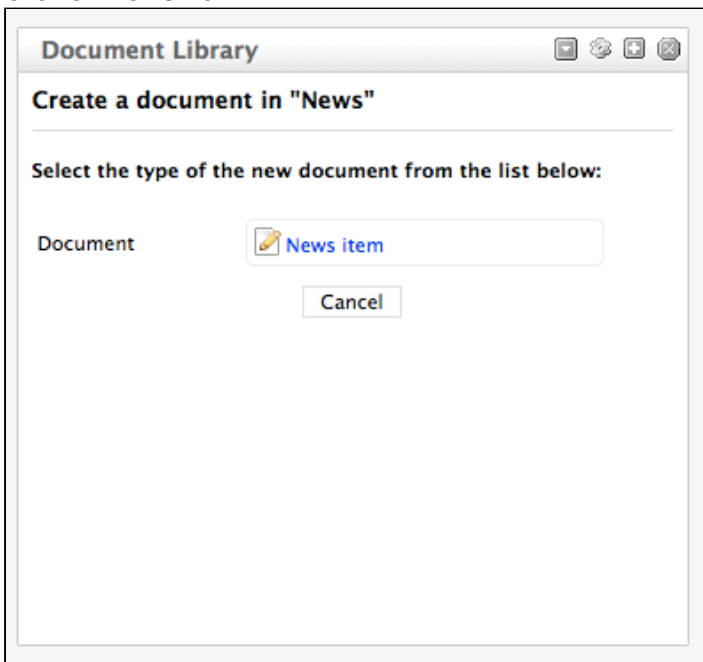
4. Click on **Create**.
The news is created in the News item container. The news collaboration view is displayed.

To create a news item quickly from the dashboard:

i Pre-requisite

The dashboard must display the Document library gadget.

1. On the dashboard's Document library gadget, go in the **News** folder.
2. Click on the icon .
3. Click on **News item**.



The news item creation form is displayed in the gadget.

4. Fill in the title, description and content.
 5. Click on the **Create** button.
- The news item is created and displayed in the Document library gadget.
By default, the news item is private. You can edit it to add a picture.

To create a News item from the Document Management view:

1. In the **Document Management** view, click on the **Collaboration** domain.
2. Click on the social workspace you want to create a news item in.
3. In the social workspace, click on the **News** folder.
4. Click on the **Create a News Item** button.
5. Fill in the document's creation form.
6. Click on the **Create** button.
7. The **Summary** tab of the news item is displayed.

News items properties

Field	Description
Title	Name of the news item
Description	Summary of the news item. This description is displayed in the News gadget.

Publication	For public workspaces. Select who should see the news item : only the space members (Restricted to the Social Workspace) or all users (public).
Picture	Upload an image to illustrate your news item.
Content	Type the content of your news item.
Format	Select which format should be used for the news item.

Rich user profile overview

The Social Collaboration module bring rich features to the user's profile.

The default user information are:

Field	Description
Username	Name the user will use to log in.
First Name	First name of the user
Last Name	Last name of the user
Company	Company or organization of the user
Email	email of the user. This address is used for alerts.
Password	User's password
Password (Verify)	User's password
Groups for this user	Groups of which the user is a member. User must be at least in 'administrators' or 'members' group, or one of their sub-groups.
Virtual groups for this user	
Avatar	Image that represents the user in the application.
Birth date	User's birth date
Phone number	User's phone number
Gender	User's gender. Default value is Male.

Public profile	Visibility of the social collaboration information of the user. By default, profiles are public.
----------------	--

The social collaboration user information are:

- [the user's network](#),
- [the user's activity stream](#),
- [the user's mini-messages](#).

Related pages

[Network overview](#)

[Mini messages overview](#)

[Activity stream overview](#)

Activity stream overview

Activity streams are feeds that display the latest events done by users. There are three activity streams:

- [the social workspace activity stream](#),
- [the user's activity stream](#),
- [the user's relations activity stream](#).

Social workspace activity stream

The social workspace activity stream displays the latest events that occurred in the social workspace. It can be displayed on the social workspace's activity dashboards only.



User's activity stream

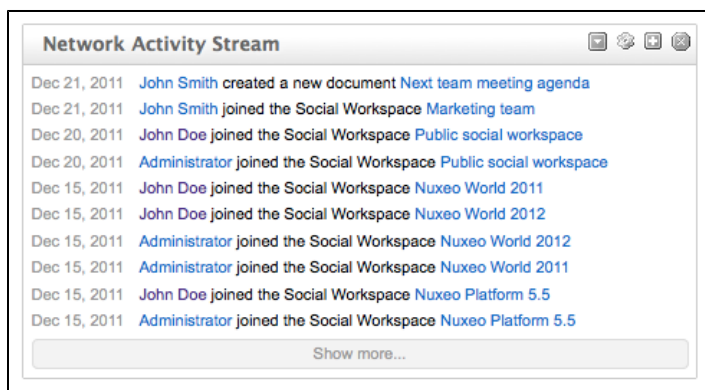
The user's activity stream displays the latest actions done by the user. It is displayed on the user's profile only.



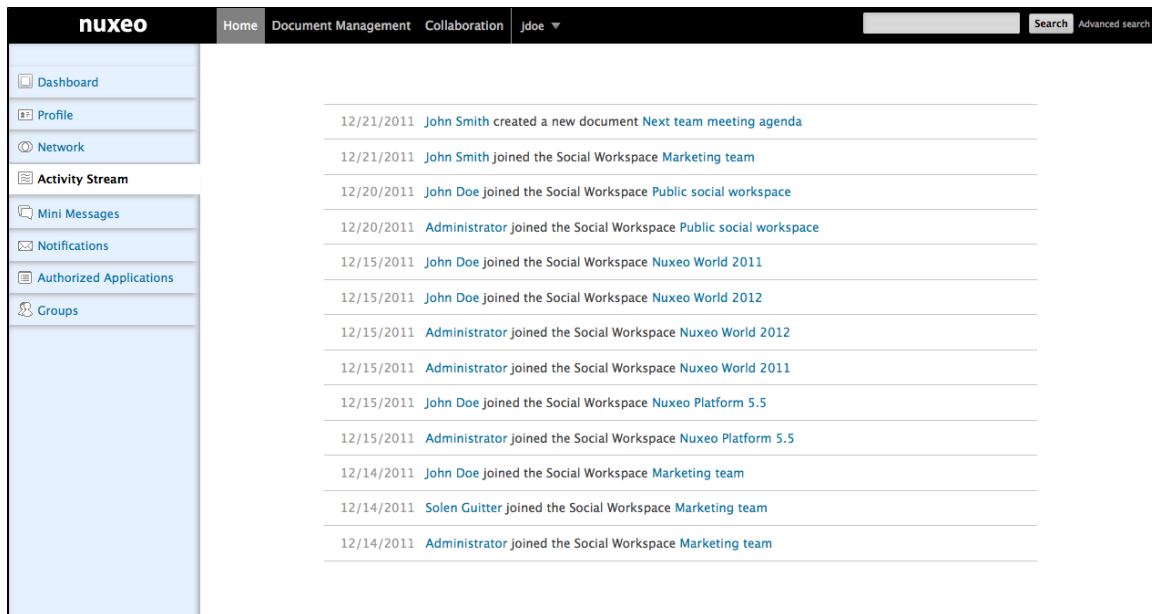
User's network activity stream

The user's network activity stream displays information about what your network members do on the application:

- which workspaces they join,
- what documents they work on (in social workspaces and in the document management area of the application),
- who they add to their network.



The network activity stream can be displayed on the user's dashboard and the Collaboration home dashboard, using the **Network Activity Stream** gadget in the **Nuxeo** category. It is also displayed on the Activity Stream tab of the user Home.



Mini messages overview

The Social Collaboration module add a micro-blogging feature, enabling users to share 140 characters mini messages.

Mini messages are public and accessible from different places.

- from your profile: users consulting your profile can see your mini messages, even if your profile is private;
- from the user's dashboard: if the user displays the **Mini Messages** gadget on his dashboard and you are in his network, your mini messages are displayed on his dashboard;
- the social workspace's dashboards: if the dashboard (either public or private) displays the **Social workspace mini message**, users that can access the dashboard can see your mini messages.

You can post new mini message from different places:

- from your Home,
- from the dashboards gadgets.

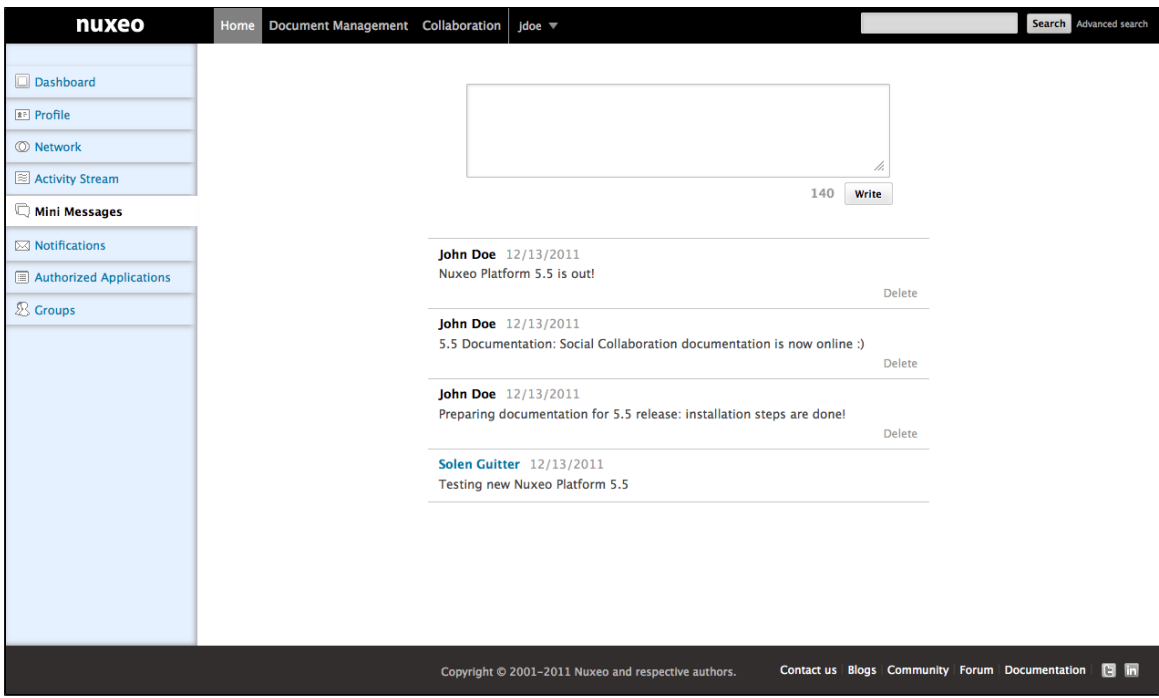
i Mini messages cannot be edited.

Adding a new mini message

To add a mini message from your Home:

From your home you can post new mini messages from your dashboard if it displays the **Min Messages** gadget, or from the **Mini Messages** tab.

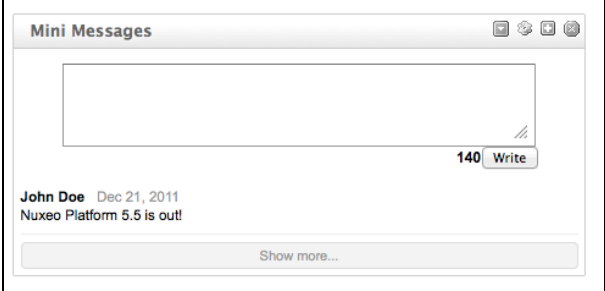
1. In your Home, click on the **Mini Messages** tab.
Your latest mini messages and those of people in your network are displayed, with a form to add a mini message on top.



2. Type your message in the text area.
As you type, the number of characters left is updated.
3. Click on the **Write** button.
The message is saved and displayed under the text area. It is also available in the Mini Messages gadgets of your networks' members' and social workspaces' dashboards.

To add a mini message from a Mini Message gadget:

In the gadget, the mini message creation form is displayed on top of the latest mini messages.



1. Type your message in the text area.
As you type, the number of characters left is updated.
2. Click on the **OK** button.
The message is saved and displayed in the gadget. It is also available in the Mini Messages gadgets of your networks' members' and social workspaces' dashboards.

Deleting a new mini message

Only the author of a mini message can delete it. Mini messages can be deleted from the Home's **Mini Messages** tab.

To delete a mini message:

1. In your Home, click on the **Mini Messages** tab.
Your latest mini message are displayed, with a form to add a mini message on top.
2. Click on the **Delete** link displayed in the bottom right corner of the mini-message you want to remove.

A confirmation window pops up.

3. Click on the **OK** button.

The mini message is immediately deleted and is not available anymore in the Mini Messages gadgets.

Network overview

The Social Collaboration module provide a social network features. Users can add and remove other users of the application from their friends or coworkers network.

Adding users to your network enables you to easily follow their activities from your dashboard:

- using the **Mini Message** gadget, you can see their [mini messages](#),
- using the [Network activity stream gadget](#), you can see what social workspace they join, who they add to their own network, what documents they work on, etc.

There are two network groups: friends and coworkers. You can add users in one or both network groups. There is no functional difference between these two groups.

To add new users to your network:

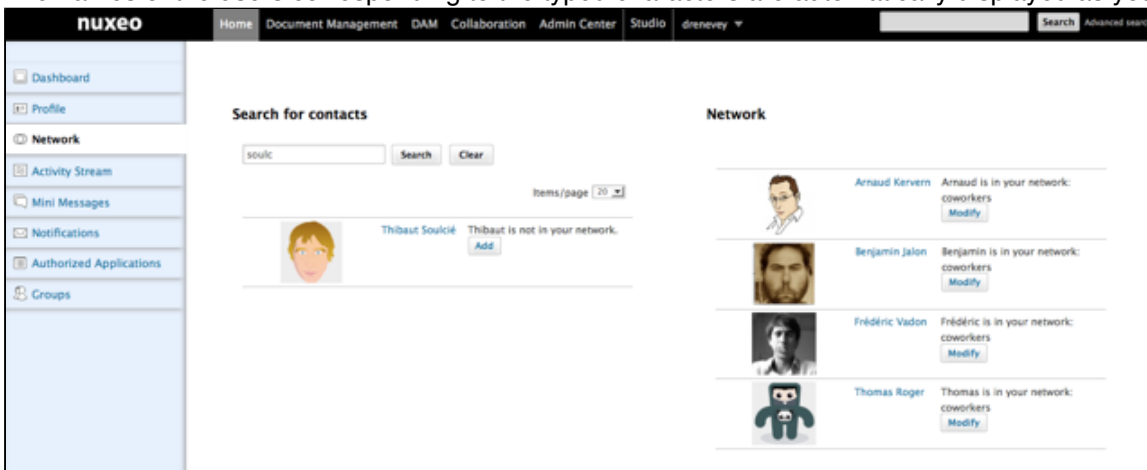
1. In your Home, click on the **Network** tab.

The page is divided in two parts:

- the left part enables you to search the users you want to add to your network,
- the right part displays your network's members.

2. Type the name of the user you want to add to your network.

The names of the users corresponding to the typed characters are automatically displayed as you type.



3. Click on the **Add** button and check the box corresponding to the network group you want to add the user into.

- ✓ Optionally you can click on the user's name to consult his profile before adding him to your network.

The user is now in your network: he is displayed in the right part of the **Network** tab and in the Network part of your profile.

You can remove the user from your network at anytime.

To remove a user from your network:

1. In your Home, go your profile.
2. In the right Network part, click on the user you want to remove from your network.
The user's profile is displayed.
3. In the User network part of the profile, click on the **Modify** button.

4. Uncheck the network group box the user is in.
The user is immediately removed from your network.