IBM® Lotus® Connections R1 Reviewer's Guide

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1. Introduction

1.1 The evolution of IBM® Lotus® Connections

Over the past several years new technologies have surged in adoption and brought about improved ways to think about our Web experiences. Many of these new technologies have gained popularity and become mainstream; for example, blogging has become an additional source of information next to online news sources, Facebook has taken college campuses by storm, MySpace has become another way to promote yourself or your music, and YouTube and Flickr have become sources to share and find media beyond your living room's TV and coffee table full of photo albums.

At IBM, we have closely observed these technologies and their adoption in the consumer market. We have applied these technologies to our own jobs and to our customers, learning in the process what is useful in a business setting. We have deployed internal versions of many popular social software technologies that have grown along with the consumer curve, becoming integral parts of our work environments.

Profiles

Several years ago, the IBM CIO Office's Intranet Development team introduced a service called BluePages, a Web-based company directory that displayed basic contact information, job title, divisions, and geographies for every employee. Over time, BluePages evolved into an application that additionally shows corporate structure, skills, background information, and photographs and was searchable by any of these fields. Employees can use the application to find people with specific skills, learn more about a person who sent them an email or a phone call, and determine where fellow employees sat.

Today, BluePages holds 475,000 profiles and serves 3.5 million searches per week. It is the hub of user requests and of all applications authentication for IBM. Having become one of the most used applications within the company, BluePages provides the basis for Profiles, one of the Lotus Connections services.

Activities

Another project brought to the Lotus Connections suite from IBM Research, Activities is a service aimed at helping individuals and groups organize their work, no matter which or how many tools they use. Business Activities occur mostly in an *ad hoc* collaborative manner. Often, process-centric or top-down systems fail to capture the real work that is required to accomplish a business objective or Activity. For example, in planning an event, there may be a process that must be followed, but that process does not capture the emails that have been sent, the chats that have taken place, the documents that have been used or written, the databases that have been accessed, and so forth.

Dogear

As social bookmarking hit the scene, IBM Research started to ask the question: "Can social bookmarking provide value to business?" While there was nothing stopping corporate users from using Internet sites to bookmark intranet pages and resources, doing so posed challenges and potential infringement of corporate data. Corporate firewalls may prevent access to these resources to anyone outside the organization, but public sharing of bookmarks could leak information in the titles, tags, descriptions, and even URLs that are visible in the social bookmarking system. IBM Research concluded that a business-ready social bookmarking solution was not only needed but was in demand, and thus Dogear was developed. After successful adoption within IBM, it was a clear this was a social software service targeted at sharing information.

Blogs

Intranet blogging has been going on at IBM for several years. As of May 2007, there were 30,000 registered users from 67 countries, with more than 75,000 entries and more than 70,000 comments. The blogging technology in use at IBM is based on the open-source Roller code and has been customized and extended for internal use. Lotus Connections blogs are also based on the same open-source code.

Open source is a set of principles and practices that IBM helps promote, in which software is made available to the general public with relaxed or non-existent intellectual property restrictions. This allows users, customers, and partners to create user-generated software content through incremental individual effort or through collaboration.

Communities

Lotus Connections Communities are the newest of the technologies and are conceptually based on IBM's Community Map, which contains groups of people with similar interests. When in the community, members can exchange information and ideas. People can join and leave the community as they wish since the community membership model is very easy to use.

From internal tools to products

Some of the many IBM customers who've been able to see our technologies before they were products have asked for special engagements to recreate them in their environments. Other customers asked the advice of IBM on what technologies to use or even best practices for adopting social software. Given this demand and the technology to back it, IBM made a strategic move to enter the social software space.

Innovation drives growth. IBM Lotus Connections is social software for business that empowers you to be more innovative and helps you execute more quickly by using dynamic networks of coworkers, partners, and customers.

1.2 Our understanding of your goals

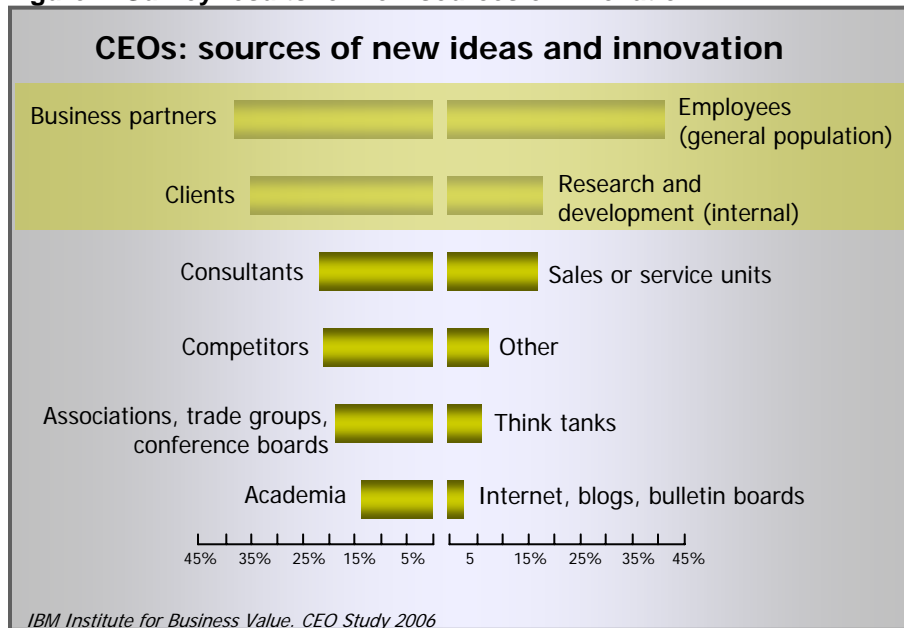Innovation is especially important right now because it's widely seen as the key to growth.

This striking statement is from a 2006 IBM survey of more than 700 business leaders from many different industries and different parts of the world. A key finding: the majority of business leaders are optimistic about their company's ability to grow. But they overwhelmingly stressed that growth will come only through innovation.

They identified three areas for innovation:

- Faster development of innovative products, services, and markets
- Adoption of new business models and processes
- Improvements to operations

In the survey, the business leaders identified from where they expect their innovations to come (see figure 1). The left side of the chart shows external sources of innovation, and on the right, internal sources. They identified business partners and customers externally, and the general employee population internally, as their primary sources of innovation.

Figure 1. Survey results for new sources of innovation

CEOs: sources of new ideas and innovation

Business partners	Employees (general population)
Clients	Research and development (internal)
Consultants	Sales or service units
Competitors	Other
Associations, trade groups, conference boards	Think tanks
Academia	Internet, blogs, bulletin boards

45% 35% 25% 15% 5%   5   15% 25% 35% 45%

IBM Institute for Business Value. CEO Study 2006

More than ever, businesses now recognize that success depends on empowering employees to work together more effectively at a grass-roots level, both internally with one another, and externally with customers and business partners.

1.3 Our approach to meeting your goals

To create a sustainable competitive advantage in the face of relentless change and intense competition, leading companies are focusing on innovation. The reason is simple: innovative companies typically grow more quickly than their competitors. The challenge is to harness and act on the best ideas from employees, partners, and even customers.

Lotus Connections is the industry's first platform for business-grade social computing. Lotus Connections facilitates the gathering and exchange of information through professional networks, provides a dashboard-like view of current projects, and connects users to like-minded communities. In addition, Lotus Connections removes the need for multiple social software applications, providing businesses with a single destination for building professional communities.

Lotus Connections has five Web 2.0-based services--Activities, Communities, Dogear, Profiles, and Blogs--that help business people quickly connect and build new relationships based on their individual needs. These components help users save time by making information previously qualified by others easily accessible. The pace of learning increases as users easily find and exchange ideas with experts across their organization. Since they have access to the experience of others, users can avoid making mistakes and duplicating tasks, saving time and improving the quality of their work.

The following excerpt appeared in the January 2007 press release "IBM Announces First-Ever Integrated Social Software Platform for Business":

"According to the industry analyst firm Forrester, social software tools will become so much a part of the fabric of an enterprise's collaborative environment that it will be like air: enterprises won't be able to imagine life without it. Further, according to Forrester, the demand for social software tools is growing with usage rates of social software services, almost doubling between 2005 and 2006.(1)"

> **"Today, more than 85 percent of a typical S&P 500 company's market value is the result of intangible assets. For many companies, the bulk of these intangible assets is its people, its human capital. It is no longer what you own that counts but what you know…"**
> —*Craig Symons, Forrester Research, Inc.*

Lotus Connections speeds growth and unlocks the collective knowledge base within an organization. Through an integrated set of social software components, the product delivers critical new capabilities to users while helping enterprises become more productive. Moreover, Lotus Connections helps organizations foster a sense of community, especially among geographically dispersed teams, helping employees come together to share their knowledge and collaborate on a project.

All kinds of employees can benefit from Lotus Connections. For example, an investment banker requiring information about growth in the technology sector could conduct a keyword search of Profiles that would immediately produce a list of experts in the field. Within seconds, the banker would also have access to relevant bookmarks, blogs, activities, and communities created by colleagues and partners from around the world with the same expertise.

The banker then could join the company's "Investing in Technology" Community and, by doing so, discover a group of colleagues able to instantly share knowledge it would otherwise take weeks to obtain. With a click of a mouse, they engage in an instant messaging chat session and brainstorm ideas. From there, the group creates an Activity so they can work together to reach their goals quickly and efficiently.

Lotus Connections helps businesses to:

- Quickly find the right people and expand contact networks based on topics and areas of expertise: With the **Profiles** service of Lotus Connections, users can search for people by name, expertise, or keyword. Search results provide standard name, contact information, and reporting structure details, along with links to the blogs, communities, activities, and bookmarks associated with the person being searched.

- Access and share information that is deemed important by others and discover new people and resources with similar interests: **Dogear**, the social bookmarking service of Lotus Connections, enables users to tag and share bookmarks. Users can find pre-qualified information by using key word searches or by subscribing to an expert's bookmarks, enabling them to find the information they need faster and to discover social networks, regardless of organizational reporting structures.

- Bring people together with common interests and assignments: With **Communities**, users can collaborate with colleagues across their organization that share common interests or work objectives. Community members discuss relevant issues, conduct polls to gather information, and share resources. Anyone within the organization or selected partners from outside of an organization, such as customers, can join and participate in a community.

- Organize the work and interactions associated with an Activity: With **Activities**, users have a Web-based dashboard for managing and completing tasks, in which they can easily organize, share, and collaborate on all files, instant messaging chats, email messages, and Web links associated with a given task. This enables employees to better track to-do lists and manage deadlines while incorporating best practices and knowledge from across their organization.

- Create an interactive community with external and internal audiences, sharing knowledge and opinions: With the Lotus Connections **Blogs** service, creating and posting blogs is fast and easy.

Searching for information on blogs is simplified with integrated blog searching tools. In addition, users can automatically track posts from key blogs through Atom syndicated format (ATOM) feeds.

1.4 Overview of integration with other applications

All the Lotus Connections services provide a Web interface and simple APIs, providing universal access and simple extensibility. Beyond this, though, Lotus Connections includes a number of extensible integrations with the tools and applications you already use. The type and depth of integration varies with what is most applicable, given the tools and the Lotus Connections services. Also, note that all these Connectors are built with IBM APIs, which are also available for partners and customers to use.

Lotus Connections integration with the IBM Lotus Notes® 8 sidebar is a powerful extension, providing features beyond the Web application via the benefits of the rich client platform of Notes.

Activities and Profiles naturally integrate with IBM Lotus Sametime®, providing the ability find related Activities or save a chat directly to an Activity without leaving the chat window.

The IBM WebSphere® Portal integration allows all the services to be added to a WebSphere Portal page or composite application. The wiring and parameters supported by the Lotus Connections portlet allow the contents to be filtered by service, tag, user, and other properties. For example, a composite application that manages a particular process can include the Lotus Connections portlet showing only Activities with a particular tag, enabling the use of activity-centric computing specifically targeted to the application at hand.

Universal and consistent support for feeds in all the Lotus Connections services allows your favorite feed reader to connect to any or all of the services, which shows, for example, a feed of new entries to your high-priority Activities, another feed off a colleague's bookmarks, and another off new blog entries with a particular tag.

There are a variety of other integration points, such as simple bookmarklets for posting links as bookmarks, activity, or community entries; the profiles contextual business card, and so on. In addition, the simple atom-based REST API makes it simple to create all sorts of mashups.

1.5 Lotus Connections is built on a Service Oriented Architecture

Figure 2 shows how Lotus Connections conforms to a Service Oriented Architecture (SOA). Each service is a set of EAR files that are installed on a Web server and that store data in a relational database. All the requests are pure HTTP requests, and the dominant means of access is via a Web browser. The Lotus Connections services are standalone Web applications that are accessible not only through a browser but also through feed readers. Feed reader data is reverse proxy cacheable, so the application does not have to regenerate the feed every time the client polls. The proxy server stores the page, asks if there are any changes, and provides a timely response.

Figure 2. Lotus Connections built on SOA
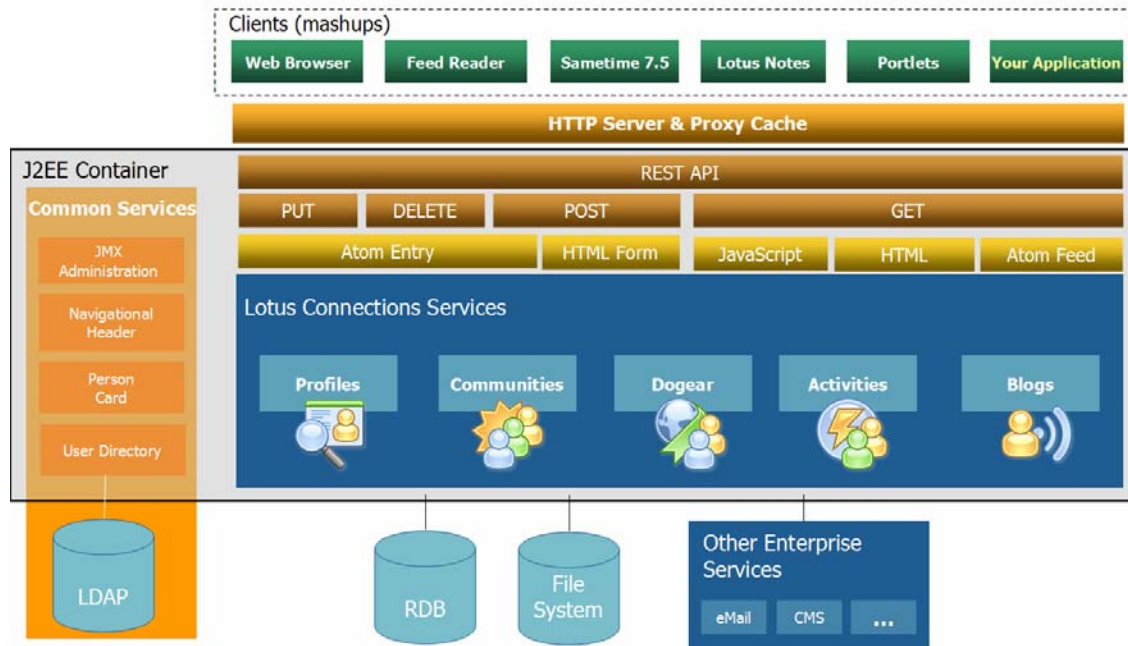
2. Activities

Activities help you organize your work, plan next steps, and easily tap your expanding professional network to help execute your everyday deliverables, faster. Activities provide a more natural way to get work done, unlike current document- and tool-centric approaches. The Activities approach is to let your work happen and capture the *ad hoc* collaboration and artifacts as they occur. Thus, it's easier to manage one's daily work with others and to discover and capture best practices in a simple manner.

2.1 Overview

What is an Activity?
An Activity is the collection of relationships between people, the materials on which they work, their communications, and the processes they use to achieve a common goal. For example, an Activity can be:

- driving a sales process to close
- preparing for an important meeting
- writing a report for a client
- hiring a new employee

An Activity is a way for you to organize your work and collaborate with others in a shared Web space. You can post messages, share files and Web links, and create to-dos in Activities. It's easy to share Activities with others, and you can use the Web-based Activity Dashboard to keep track of your current, prioritized, and completed Activities. There's more to it, but that's a good start.

How do people use Activities to be more effective?

Activities are a good way to improve awareness and coordination in small teams. For example, suppose you identify a goal ("create a presentation" or "resolve a software problem" or "research a topic") and create an Activity for that goal. You can share the Activity with the people you work with so you all can stay on the same page, so to speak. You can post content to the Activity and collaborate with a variety of shared tools. When you are done with the Activity you can mark it complete, so your Activity dashboard is always up-to-date with your current information.

Activities are also a single place in which you can bring together various elements that are required for a task or project, including chats, documents, images, messages, and Web links, to name a few. Activities do not make you switch from the tools you use day-to-day; instead, Activities bring them all together.

How can I create an Activity?

Your Activity Dashboard contains a list of your current Activities and is the main page you see when you log into Activities. From your Activity Dashboard, click the "New Activity" button in the top left corner and complete as much information as you want. Figure 3 shows a sample Activity (see figure 3).

Figure 3. Sample of creating a new Activity

In the Activity, you can specify members to be in different roles, such as author, reader vs. public access, as well as base an Activity on a template. You can find these selections clicking the "Show More Options" link.

Also, from the Activity you just created, you can add messages, files, to-do's, bookmarks, or even links to other Activities (see figure 4).
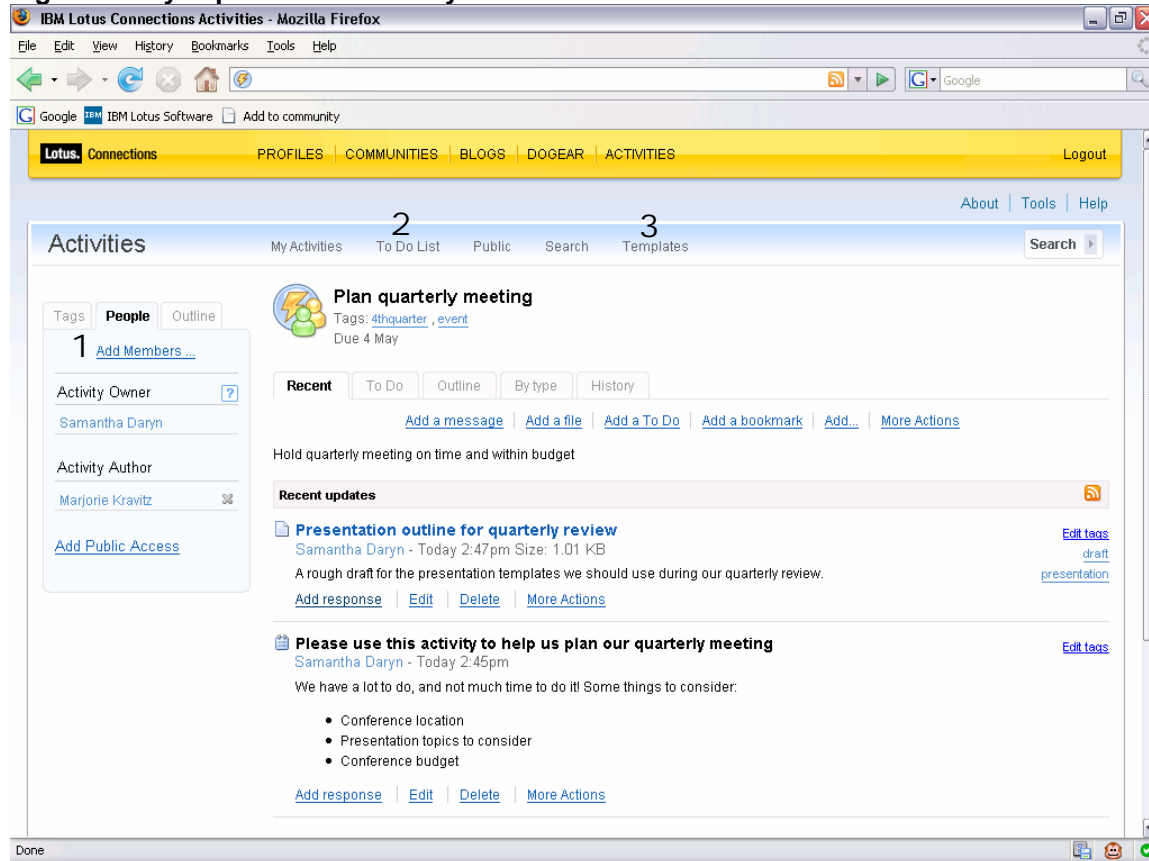
Figure 4. Outline tab
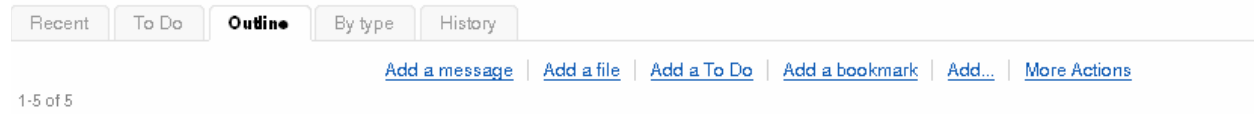
## 2.2 Goals and highlights
Now let's discuss the Add Members, ToDo List, and Templates portions (see figure 5) of an Activity.

Figure 5. Key aspects of an Activity

(1) Add Members: You can share Activities with other people directly from the "new Activity" form or within the Activity itself. The type-ahead feature lets you find people within the organization (see figure 6). If you cannot locate the person with which you want to share the Activity, you have the option of adding them using their email address. You can add multiple people to an Activity at the same time by using a comma-separated list.

Figure 6. Adding members
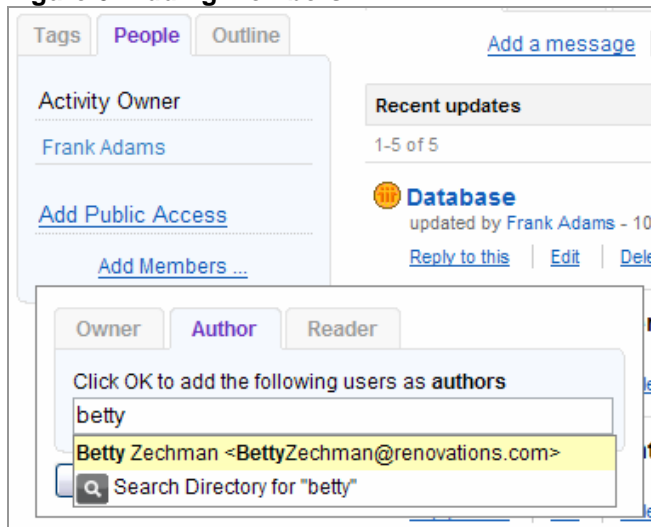
You can also set up Public Activities. Public access (read only) makes the Activity completely public for anyone to view but not edit. Public access (without the read only) allows anyone to add content to the Activity and edit their own entries.

There are three different types of roles – Owners, Authors, and Readers – that provide users the option of providing different levels of access to content within Activities. Owners have the ability to view, edit, and delete all the Activity objects. Owners can also add people to the Activity in any role. Authors have the ability to view and add objects as well as to edit and delete their own entries. Authors can also add people to the Activity in the Author or Reader role. Readers have the ability only to view.

(2) ToDo List: See across all your to-dos. To-dos let you to create action items as you are working through an Activity, assign due dates to them if you wish, and even assign ownership. They can help augment and assign work to the people involved in the Activity. All the to-dos across all your Activities are collected into one view for you to act on.

(3) Templates: Reuse existing knowledge. If you find that you do the same type of Activities repeatedly (for instance, creating a patent or delivering a customer briefing), you can create an Activity template with all the content you need to complete the task (a to-do list, some Web links, etc). You can then instantiate a copy of the template to get started with a "pre-filled" Activity (see figure 7).

Using the template, you can structure the Activity as you see fit without imposing deep structure and you can use placeholders, tags, and even add members just as you would with a regular Activity.

Others can then find your Activity template and create a new Activity from it, saving considerable time. The *ad hoc* communications that occur during the Activity can be added to the Activity naturally without affecting the template.

Figure 7. Example template
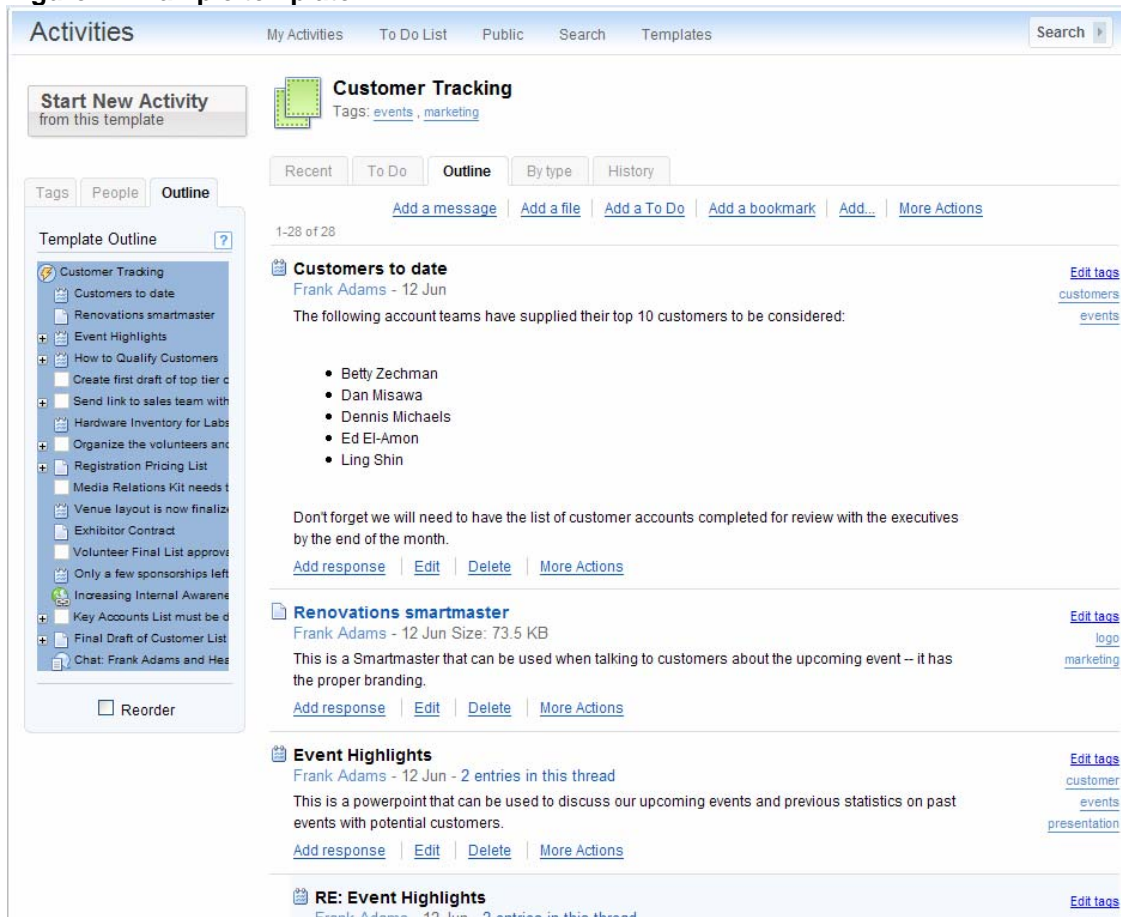
Other features

- **Change the priority of your Activities.** Prioritizing Activities enables users to surface the most critical Activities on their dashboard. You can set High Priority and Medium Priority (see figure 8) on Activities simply by clicking the Activity icon on the left-hand side of the Activity title and choosing the appropriate priority from the list. You can also set the Activity back to the default (Normal).

Figure 8. Setting the priority
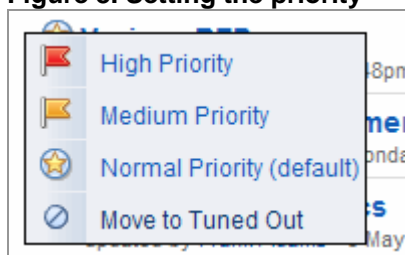
Changing an Activity to high or medium priority places a link to the Activity in the upper-right-hand corner of your Activity dashboard, so you can be aware of the items that require your immediate attention.

When an Activity is completed or you no longer need to track it in your main Dashboard view, you can use the "Tune Out" command to move the Activity out of your dashboard and into your "tuned out"

list. Even though an Activity is set to "tune out," you are still able to access and post information, and you can always select the "tune in" option so that the Activity reappears in the current Activities list.

- **Use placeholders to mark future needs.** You can add a "placeholder" file to an Activity when you know you will place a file in that Activity, but the file is not yet completed. You can do this when you create a new activity. To do this, choose "Add file" and "Show more options" and select the "Mark this entry "placeholder" option (see figure 9).

**Figure 9. Mark the entry "placeholder" option**

- **Use browser tools to add to and search an Activity quickly.** From the Tools page, you can add browser tools that let you quickly search and bookmark Web pages to existing Activities (see figure 10).

Figure 10. Browser toolbar buttons

Tools: Web Browser Toolbar Buttons

To quickly add web links to activities, drag the bookmark button below to your links toolbar.

When you're viewing a web page that you'd like to add to an activity, press the "Add to activity" button that you just created.

> **Add to activity...**
> Drag this button to your Links Bar.
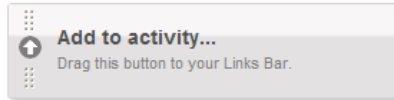
To search your activities directly from the firefox browser, drag the bookmark button below to your links toolbar.

When you're viewing a web page, select text on the page and press the "Search your activities" button that you just created to search your activities for the selected text.

> **Search your activities...**
> Drag this button to your Links Bar.
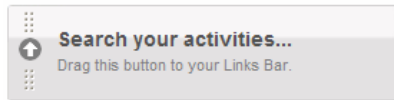
Clicking the Add to activity button displays a window in which you can add the current URL to any of your existing Activities as well as tag the bookmark. The Search your activity button lets you quickly keyword-search your Activities and returns the results in a browser page.

3. Dogear

Dogear lets you save, organize, and share bookmarks and reveals bookmarks that have been qualified by others with similar interests and expertise. The tagging is a Web 2.0 capability offered by all the Lotus Connections services. Tagging replaces fixed, top-down taxonomy classification with bottom-up "folksonomies," from which emerge superior categorization and searching capabilities -- the "wisdom of crowds" aspect of Web 2.0. The tagging in Dogear is intended to make a body of information increasingly easy to search, discover, and navigate over time.

3.1 Overview

Dogear (a.k.a. social bookmarking)

Dogear enables you to store Web sites or any addressable URL to a central location. By storing bookmarks to a central location, you can access your bookmarks from multiple computers and browsers while maintaining the same user experience. Since Dogear is based on this central location, the service provides added value by allowing users to tag and describe the resource that is helpful when sharing this information with others.

When tags are used to describe a resource, a level of credibility is added to that resource when returned within a search result set, since someone else tagged that resource based on their description. Dogear opens the flow of information by letting you subscribe to tags or people to receive "just-in-time knowledge." Other features of Dogear that are discussed later include:

- A central spot for storing and organizing bookmarks across workstations.
- A way to publish some or all your bookmarks so that others can see your collection of content.
- Tags that let you identify bookmarks with a keyword that you choose. Tags make searching for and sharing bookmarks easier.
- Contact information about bookmark owners is provided so you can locate and connect with other users.

Why would I store bookmarks to a central location?
Dogear enables users to import bookmarks that are stretched across different browsers into a single location. The information is stored on a server, making it easy to access, manage, and update.

For the many users who are forced to upgrade hardware and software regularly, Dogear alleviates the need to move files between computers. Storing your bookmarks on a central server also lets you share content that you find interesting or critical to your job. For example, if you are in someone else's office or if you have multiple machines, you can easily find, share, and collaborate on information stored on the central server.

How does it work?
Dogear easily integrates with your browser to be able to store bookmarks. Whether browsing the Internet or Intranet, you can have the same experience when bookmarking Web sites.

Tags
When you decide to bookmark a Web site, you are presented with the New Bookmark dialog box (see figure 11). The Title and URL are pre-populated, but you can modify these. Optionally, you can add your own rich text Description or just copy content from the Web site. You can describe the resource any way you wish in the Tags field.

Figure 11. New Bookmark dialog box

Dogear provides recommended, popular, and recent tags to help you build the folksonomy. This helps users understand what others are using when they are visiting the same page as far as referencing it for future use. Tag type-ahead feature presents a dialog box of previously used tags within the service. Additionally, you can see how many times a tag has been used, to aid you in tagging and contribute to the folksonomy so common tags are used across the organization.

3.2 Goals and highlights
To build synergy among the services, a user-friendly Web interface is provided for Dogear, as shown in figure 12.

Figure 12. Dogear Web interface
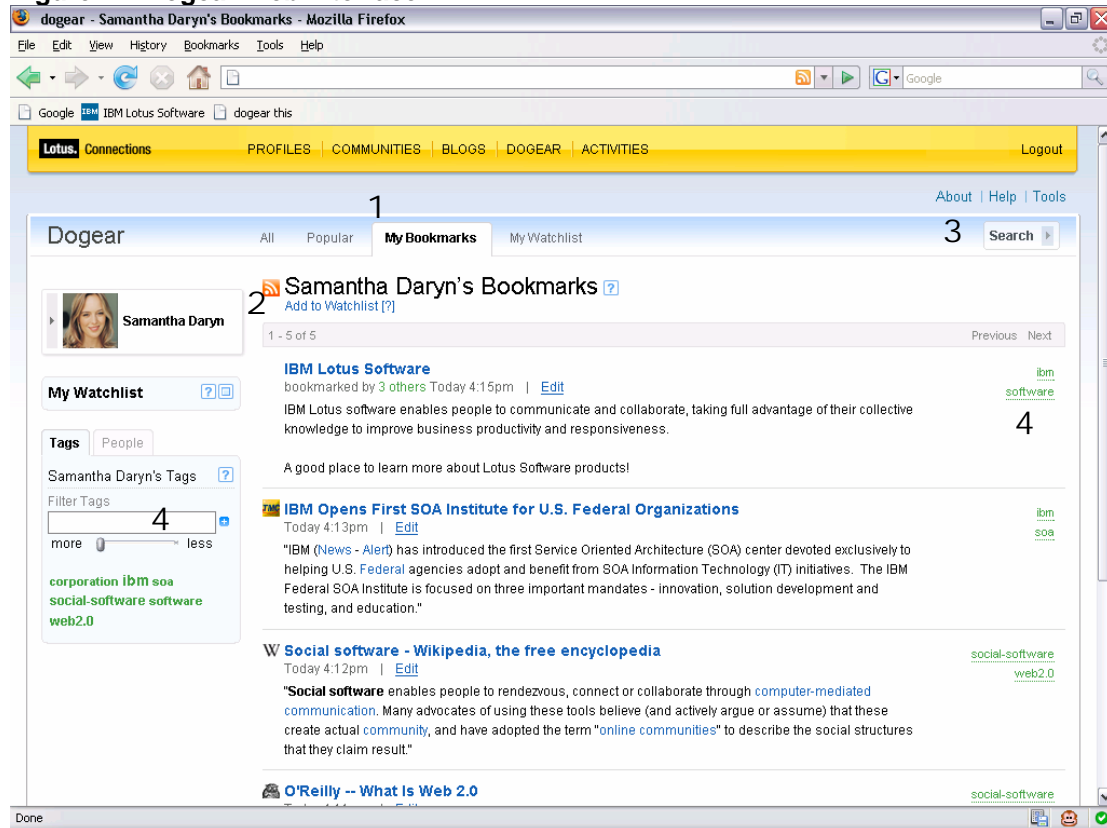
(1) My Bookmarks. Dogear allows you to store any Web site you like and provide a description, title, and tag(s) associated with it. The My Bookmarks page is specific to you. This page allows you to view your most recent Dogear bookmarks. If you do not want some of your bookmarks to be shared and visible to other users, Dogear has the option to mark bookmarks as private.

(2) Add to Watchlist.
Using the My Watchlist page, you can dynamically track bookmarks associated with a tag or person by clicking on the action: "Add to Watchlist." The bookmarks to which you subscribe appear on this page, and when a new bookmark is created by a specified person or tagged with a specified tag that you are "watching," it is automatically added to your watchlist.

(3) Search for people and information. Storing bookmarks is not a new concept; however, you now are able to search for both shared and private bookmarks from the same location, allowing you to better manage information and improve productivity. Using the Dogear service, you can search within your bookmarks or all shared bookmarks (see figure 13), and the use of tags to describe a bookmark allows for quick and improved search results.

Figure 13. Bookmark search options
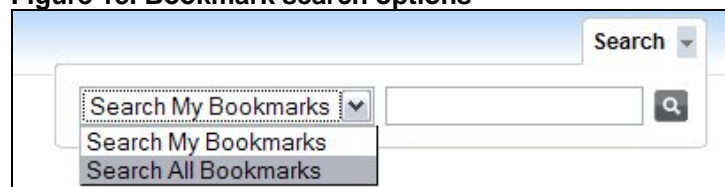
Since Dogear lets you bookmark both external and internal Web sites, searching will also return both internal and external results. For example, a search on "finance" returns internal as well as external bookmarks related to finance.

(4) Tagging. Tags, a fundamental aspect of Web 2.0, are one or more keywords you want to associate with a resource or, in this case, a bookmark. The bigger and bolder the font, the more often that tag word has been used (for example, "gadgets" in figure 14). If you hover over the word it will provide a popup with the current number of times that tag has been used.

Figure 14. Personal tags
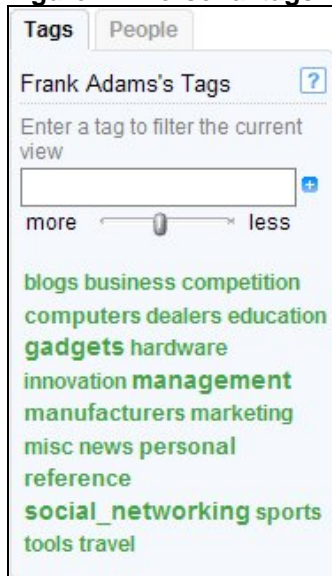
Dogear displays tags associated with each bookmark, if available (tagging is optional, but recommended). Lotus Connections also provides tag clouds within each of the services as a visual depiction of content tags. Tag clouds are prevalent throughout Dogear as you can view your personal tags (see figure 14), other people's tags, associated tags (figure 15), and all tags within the Dogear service.

Figure 15. Associated tags
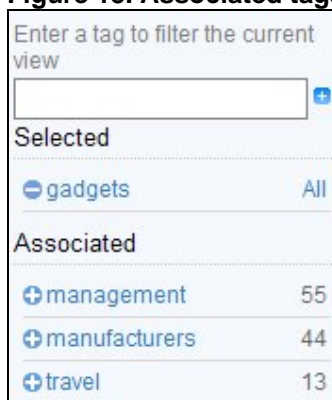
Tagging is designed to be dynamic and informative, and the Dogear service allows you to manage your tags. As new buzz words, product name changes, and new information becomes relevant to a bookmark, you are able search and replace tags as well as delete them. You can do this by using the Tools link (in the upper-right-hand corner of figure 12).

Other features:

What about all my local bookmarks? Dogear allows you to import your locally stored bookmarks and automatically create tags based on folder names, if you have created folders for your favorites. For instance, if you have a folder called "connections," when you import the bookmarks contained in that folder, Dogear will automatically tag them as "connections." You can also modify the bookmarks later to remove or add any additional tags. To import your local bookmarks, select Tools, Import Bookmarks.

Who's reading my bookmarks? Now that you are using Dogear to store your bookmarks in a central location, people within the organization can find your content. Suppose some people revere you as an expert on certain topics based on the information they see you have bookmarked. That's a case in which they may want to use the "Watchlist" option, which enables them to continually watch as you bookmark new information. In addition, you can see who has watchlisted you (see figure 16)!

Figure 16. Users that Watchlisted me

Is there anybody else like me?
Sharing information and drawing correlations with other people and information is a driving force behind Lotus Connections. Dogear compares the Web sites you have bookmarked across all users in the system to display a list of people with which *you* are associated (see figure 17). This list allows you to view other people that are bookmaking the same Web sites and could be used to start a Lotus Connections Community around a specific topic.

Figure 17. Related People

4. Communities

A Community lets a group of people who share a common interest interact with one another and share relevant information. A Community provides the means for users to stay in touch, share information, and exchange ideas.

4.1 Overview

Lotus Connections provides tools for finding, joining, and watching communities, so users can see what's new, popular, or active. In a Community, you can work with people who share a common interest, responsibility, or area of expertise. Communities can reference and tag blogs, Activities, and other resources via bookmarks and feeds. A public community is available for all to join, while a private community is restricted to a particular group.

Communities provide an excellent way to connect members of a project team, organize a task force researching an emerging technology, or bring together a group of people who share any interest. Use the tools provided with the Communities service to reach out, make connections, get organized, and start sharing information. As a community owner, you can invite others to join and to manage the content and membership for the community.

4.2 Goals and highlights

Let's review some of the Community highlights, as shown in figure 18.

Figure 18. Highlights of the All Communities page
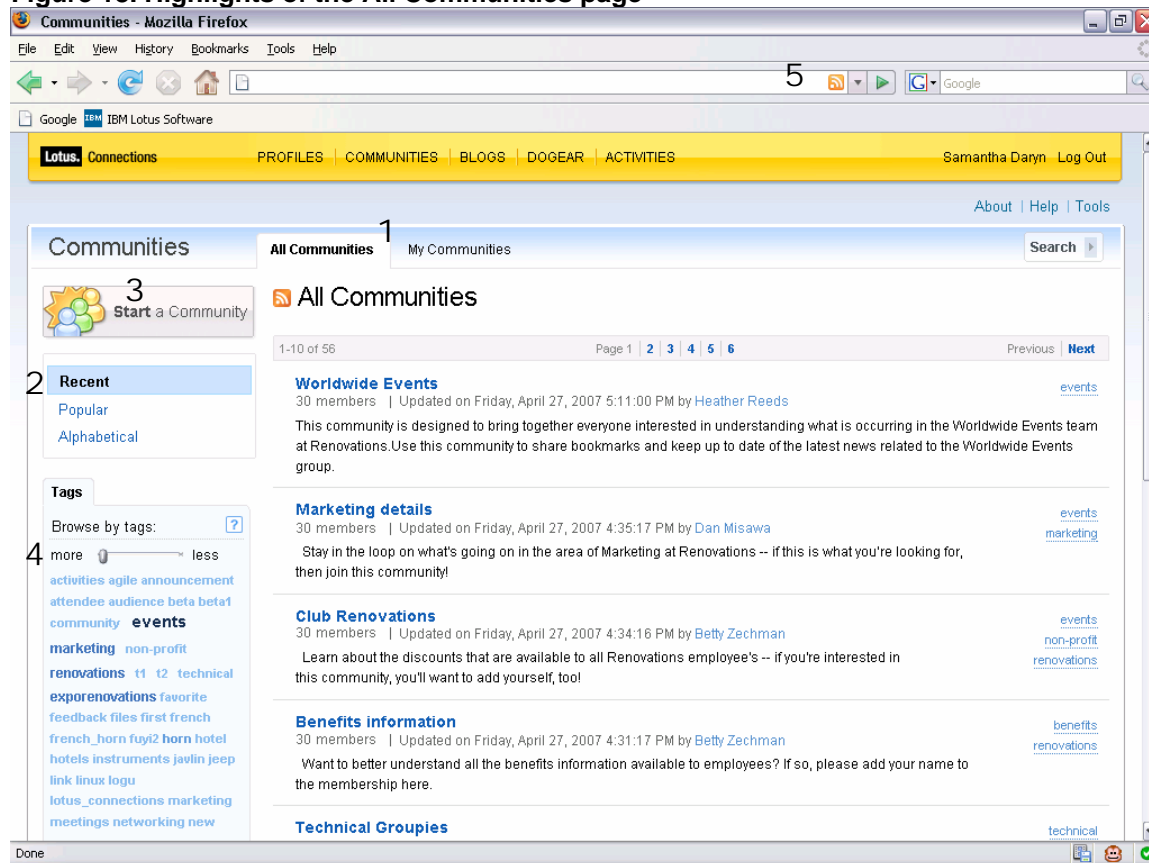
(1) All Communities and **My Communities.** You can view all the communities in your organization or just those to which you belong, using these navigation tabs.

(2) View Communities. You can view the most recent communities, the most popular communities, or browse them alphabetically.

(3) Start a Community. You can start a Community quickly by providing a name, description, and tag(s).

(4) Browse by tags. You can browse the community content by tags, filtering on frequently used tags as needed.

(5) Add a feed reader. Subscribe to a Community outside the Web page by adding the feed to your feed reader.

Whether you are joining a Community or starting one of your own, you can use these features to get the most out of your experience.

Now let's touch on the highlights of a sample Community about Worldwide Events (see figure 19).

Figure 19. Highlights of a sample Community
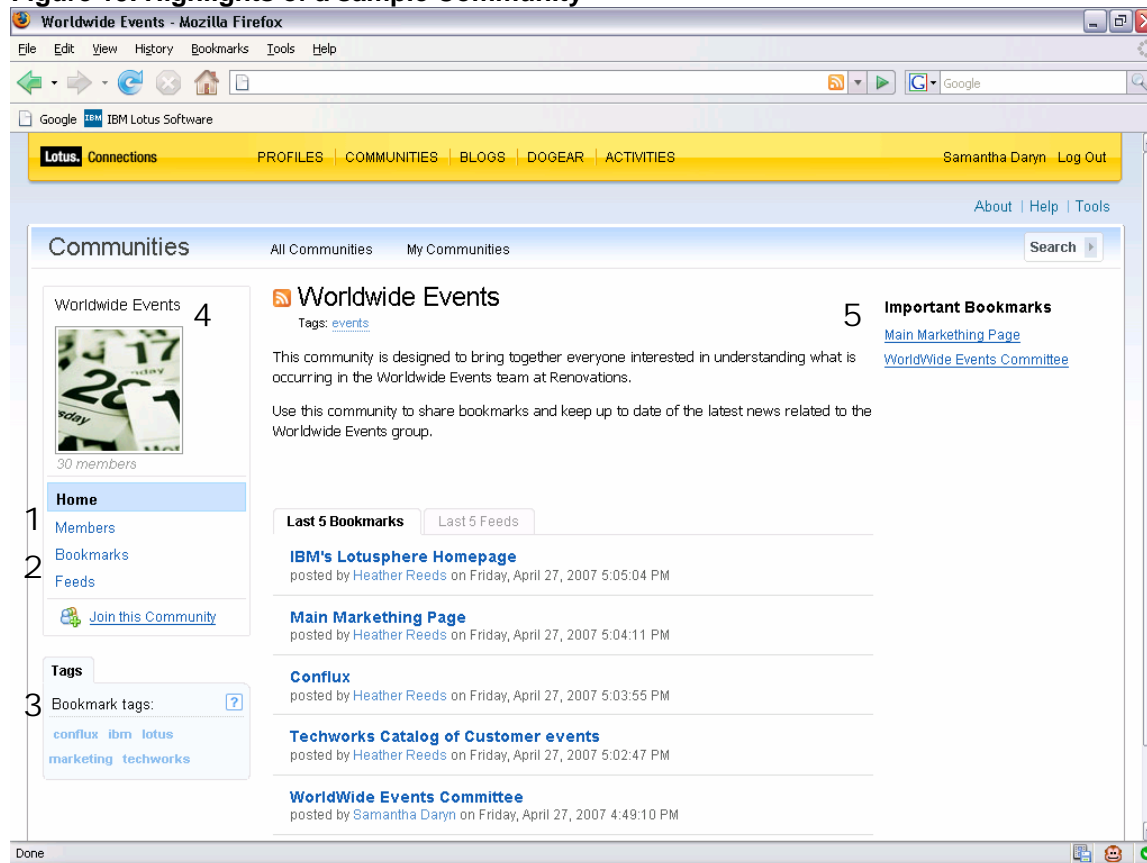
(1) Membership tab. Use this to add or remove members from your community. All members of the community can see the list.
(2) Bookmarks. Members can add bookmarks to Web sites of information or feeds to the community.
(3) Tagging. Use tags to assign descriptive keyword(s) to your community. Tags are useful for searching for a particular type of community or filtering the list.
(4) Graphics. Import a graphic to give your community a unique look.
(5) Important Bookmarks. Add important links to the home page of the community to keep the group updated on important information.

5. Profiles

Profiles is a directory of the people in your organization along with information you need to form and promote effective networks. In addition to basic information captured in a business card format, Profiles can catalog skills that users provide such as technical expertise, familiarity with foreign languages, and

areas of interest as some examples. Profiles facilitates collaboration by helping you find and contact the right people fast.

5.1 Overview

Use Profiles to let people in the organization know who you are, what you do, what projects you are working on or have worked on, what tools and technologies you use, what problems you are currently trying to solve, and what you are reading or writing.

You can also use Profiles to discover who in the organization is working on projects like yours or is finding solutions to similar problems, and what resources they are using to simplify their jobs. Determine who your coworkers are, what their interests are, what skills they have, what they are publishing or reading, and get in touch with them.

Figure 20 shows a sample Profile and the type of information contained therein.

Figure 20. Sample Profile

(1) Contact information. Includes typical information you would find on a traditional business card such as name, job title, company, location, telephone numbers, and email addresses.

(2) Pronunciation. Clicking this link plays a recording of the person's name spoken with the correct pronunciation. Use the business card icon to export the person's contact information as a virtual card file (vCard).

(3) Reporting Structure. Provides the following view options:

- Full report to chain: Shows the Profile owner's position, from the Profile owner up to the top of the organizational chart.
- Same manager: Shows the people who also report to the Profile owner's manager.
- People managed: Shows the Profile owner's position within the full organizational chart, including people managed by the Profile owner.

(4) About Me. Provides current work experience, technical skills, languages spoken, and interests. Background describes past work experience and education. Reporting Structure is also displayed here in addition to the visual map described in "(3)" above.

(5) List of links. Contains links to the other Connections services:

- **Activities**: Lists the Activities that you and the Profile owner share.
- **Blogs**: Lists the blog(s) for which the Profile owner is an author.
- **Bookmarks**: Lists the public bookmarks that the Profile owner has created.
- **Communities**: Lists the public communities to which the Profile owner belongs.

(6) Profile Tags. Contains short keywords defined by the Profile owner to identify skills, areas of interest, or work Activities.

5.2 Goals and highlights

Tagging your Profile
A tag is a descriptive keyword that you assign to your Profile to identify your work activities, skills, or interests–similar to the other services previously described in this document. The tags you assign to your profile are displayed in the Profile Tags tab of your profile. Tags describe what you do and what you care about, so when you create tags, choose keyword(s) that represent your true interests or areas of expertise.

Publicize your skills
By assigning tags to your profile, you describe your skills, job role, interest, and education to others in your organization. People can find you by performing searches on tags. For example, if someone is looking for an expert on financial planning, they may search on tags like "finance" and "financial-planning". You choose what tags by which you want to be known, therefore publicizing the skills you wish to share.

Find colleagues
Click one of your own Profile tags to quickly find other people who share your interests or who may be working on similar projects. People with whom you share common tags are likely to be good resources for you. After you obtain their contact information from their Profiles, you can begin collaborating with them. If your organization is using IBM Lotus Sametime as your synchronous collaboration solution, your online status can also appear in your profile, allowing people to start a chat with you right from your profile.

Performing Searches
Let's now review the search feature of Profiles, as shown in figure 21.

Figure 21. Search Profiles tab
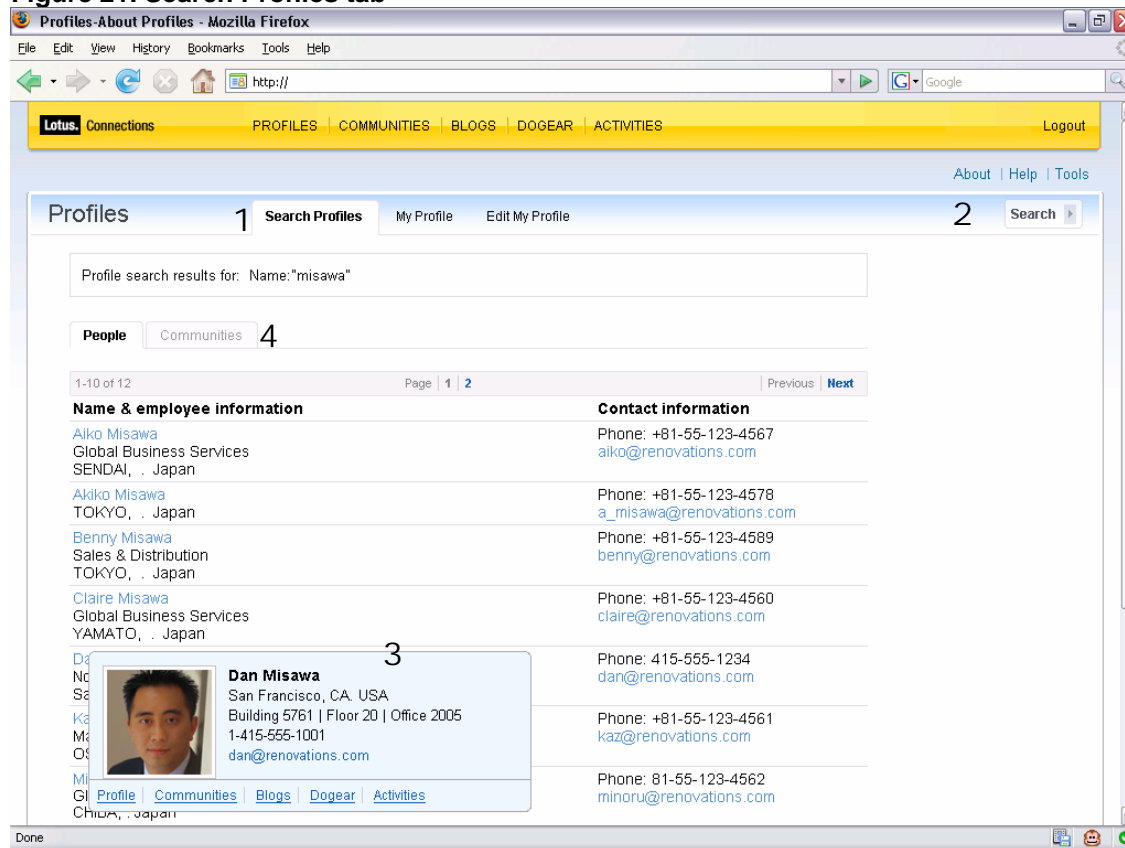
(1) A "quick search" searches against a single field in the directory profiles. To run a quick search, click the drop-down box beside the "Search people by name" field to choose the Profile field you want to search.

(2) An advanced search narrows the search by letting you search multiple profile fields at the same time. It is a more targeted search than a quick search, which searches against only a single field at a time.

(3) Search results are displayed in the People tab. You can view the business card of a person returned by a search by clicking the down arrow that displays beside their name.

(4) If Communities is enabled and you search by a tag and related information, you can click the Communities tab to open the Communities search results view. Relevant communities will be displayed in this view.

6. Blogs

Use a blog to present your idea and get feedback from others, in that way learning from the expertise and experience of others who blog. Blogs are a key tool for social networking, providing a medium to share knowledge and build networks and relationships. In a business setting, blogs are a great tool for delivering timely information with a personal touch. Other features of Blogs are explained later, including:

- Creating a group blog in which you and others can post information.
- Creating blogs using a theme and switching to different themes at anytime.
- Using the Blogs home page as a source to view hot blogs and popular comments available across the entire organization.

6.1 Overview

Blogging lets you share information and events such as a new product launch. Blogs are widely growing with Web 2.0 technologies to inform business partners and customers about topics that range from experiences at a trade show to tips on using new technology. Blogs are a fast, effective way to get the word out!

The Blogs home page consists of a dashboard-type visual display of the blog service of Lotus Connections (see figure 22). It provides a snapshot of what blog entries are active and allows you to quickly search by tag or full text index to find information that suits your needs. Blogs are a flexible medium for communicating within an organization or across business partners and customers.

Figure 22. Blogs home page
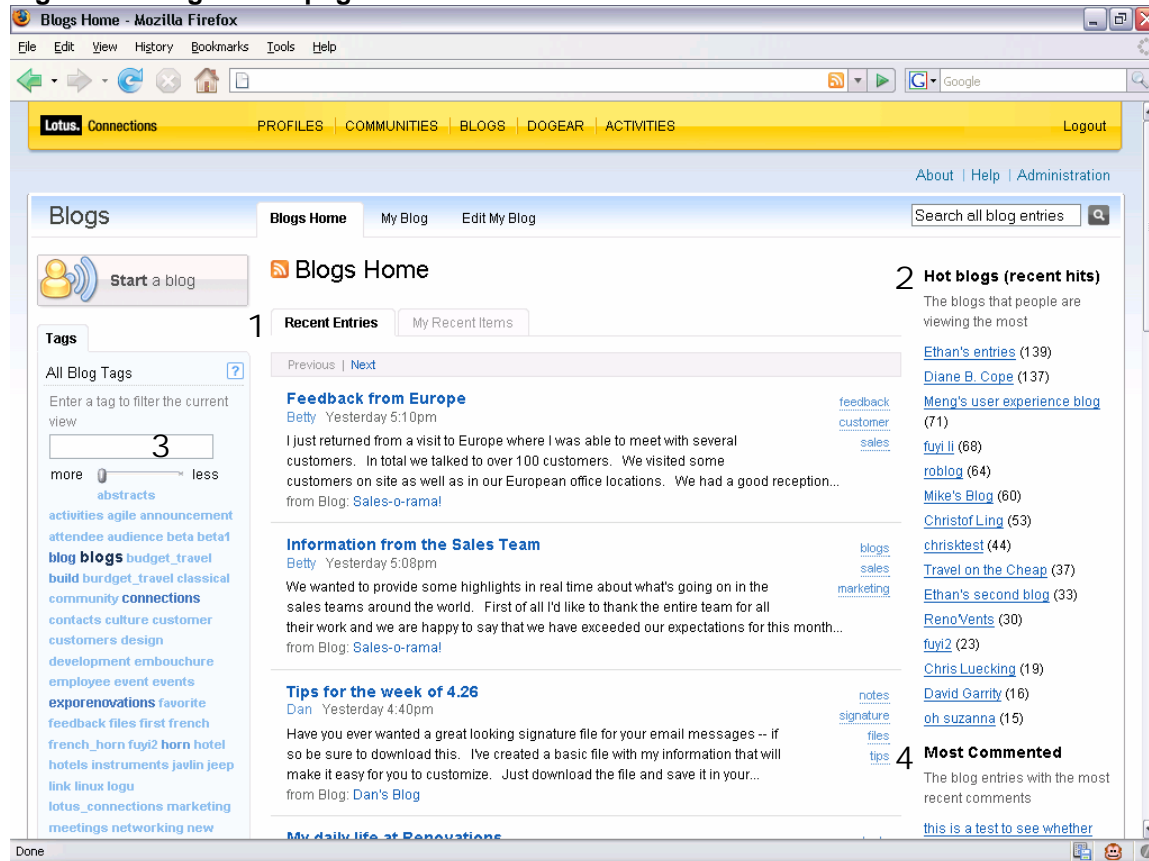
(1) Recent Entries. Shows an aggregation of new blog posts. Each entry displays the entry title, tags, blog name, date posted, and author. You can also switch over to the My Recent Items tab to view your most recent blog entries.

(2) Hot blogs (recent hits). As blog entries have become a mechanism for knowledge sharing and feedback, users want to be notified or "pushed" information that is relevant to the blogging service. Hot blogs lists those entries that have been viewed the most.

(3) Blogging tag cloud. Tagging is an important aspect of social software and Lotus Connections, a fact that's been noted throughout this document, and these same characteristics can be applied to blogs. While tags are optional to blog entries, they are recommended as a method to improve searching and build folksonomies. The tagging in blogs makes the body of information increasingly easy to search, discover, and navigate over time.

(4) Most Commented. Similar to Hot blogs, this provides a list of blog entries with the most comments, allowing you to share your thoughts and opinions with your colleagues, business partners, or customers.

6.2 Goals and highlights

Create your own blog
Simply click the Start a blog button in the upper-left-hand corner of the Home page, and give it your own title like "Web 2.0 Technology"" and a description for your readers. As the blog owner, you can also change your theme. The theme is the collection of templates that controls the look and layout of the blog.

Team blogging
A blog can have a single author or allow for multiple contributors. As blogs give you the tools to collect and share input, team blogging allows a collection of authors to provide their ideas and thoughts.

Rich text editor
Posting a blog entry gives you complete rich-text-editor ability to insert hyperlinks, images, horizontal rules, and bullets. The available text attributes include color, bold, italic, underline, and strikethrough.

Uploading a file to a blog
Use the file upload utility to enhance your blog with graphics, podcasts, or various other files.

Change the look and feel of your blog
It's your blog, so you have a variety of theme options by which you can change its look and feel. For example, change the color scheme and mash up other Lotus Connections services like Dogear, as shown in figure 23.

Figure 23. Blog with Dogear mashup
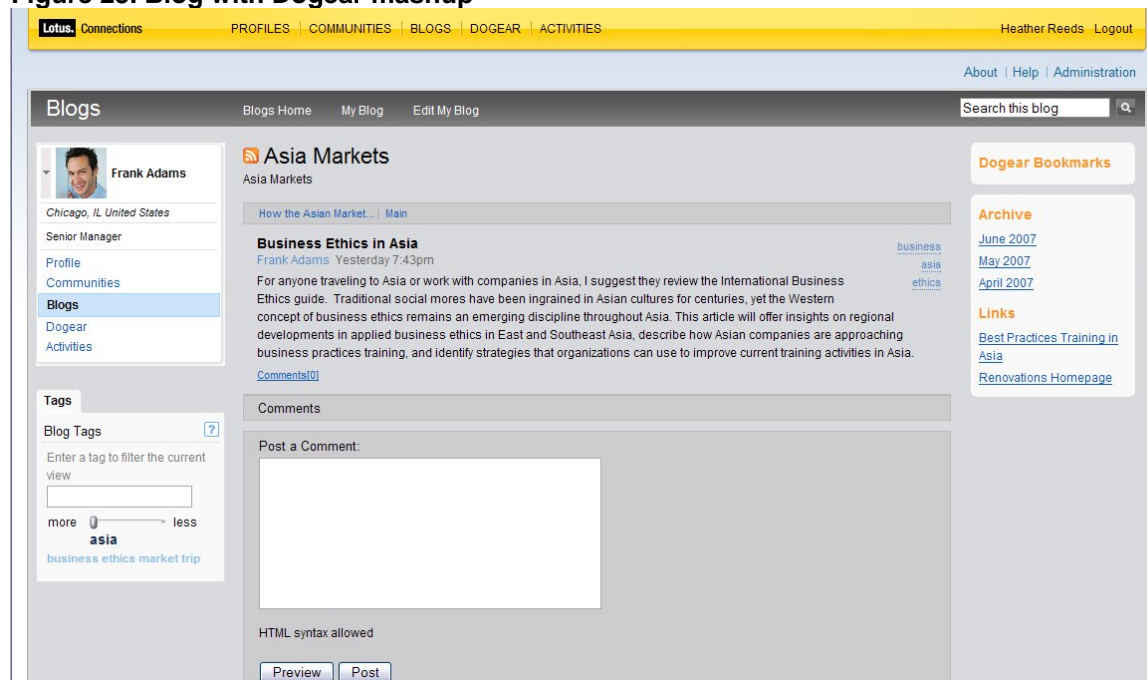
7. Extending Lotus Connections to other applications

Lotus Connections can be easily extended because the data supports a Representational State Transfer (REST)-style, HTTP-based API with XML, Javascript, and HTML-formatted output. Thus you can leverage the data and content within Lotus Connections to existing desktop and browser-based applications. Whether you are an amateur or professional developer, these Open Standards provide access to build integration inside your organization's applications.

7.1 Integrating Activities with IBM Lotus Notes and IBM Lotus Sametime

Activity plug-in for Lotus Sametime

Activities are designed to provide the tools to organize your work so as to best complete your goals. Often, information contained in emails or instant messages are relevant to a broader community and can contribute to the completion of a goal you may be working toward as an Activity.

Instant messaging can be a critical application for completing an Activity. While Lotus Sametime allows for group chats, often the contents of the chat could be distributed or shared among all members of an Activity. To that end, the Activity plug-in lets you add a chat to a new or existing Activity (see figure 24) and provide a name and tags.

Figure 24. Add Chat to Activity dialog box
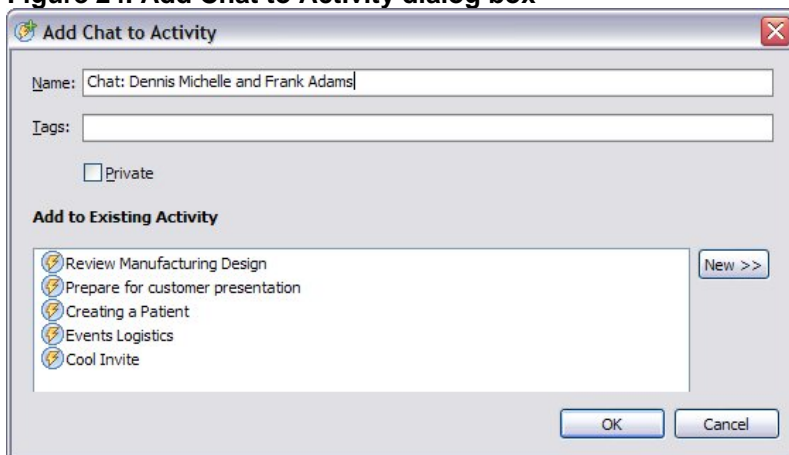
Activity side shelf for IBM Lotus Notes 8

Email messages are just as important as instant messages and sometimes need to be shared among all members of an Activity. The Activities side shelf for Lotus Notes 8 (see figure 25) lets you drag and drop an email message to an Activity and display all your Activities. Additionally, you can display the members of the Activity or sort the content in a list view, outline view, or ToDo list. The Activities side shelf for Lotus Notes 8 requires the Activities service that is part of Lotus Connections.

Figure 25. Activity side shelf for Lotus Notes 8
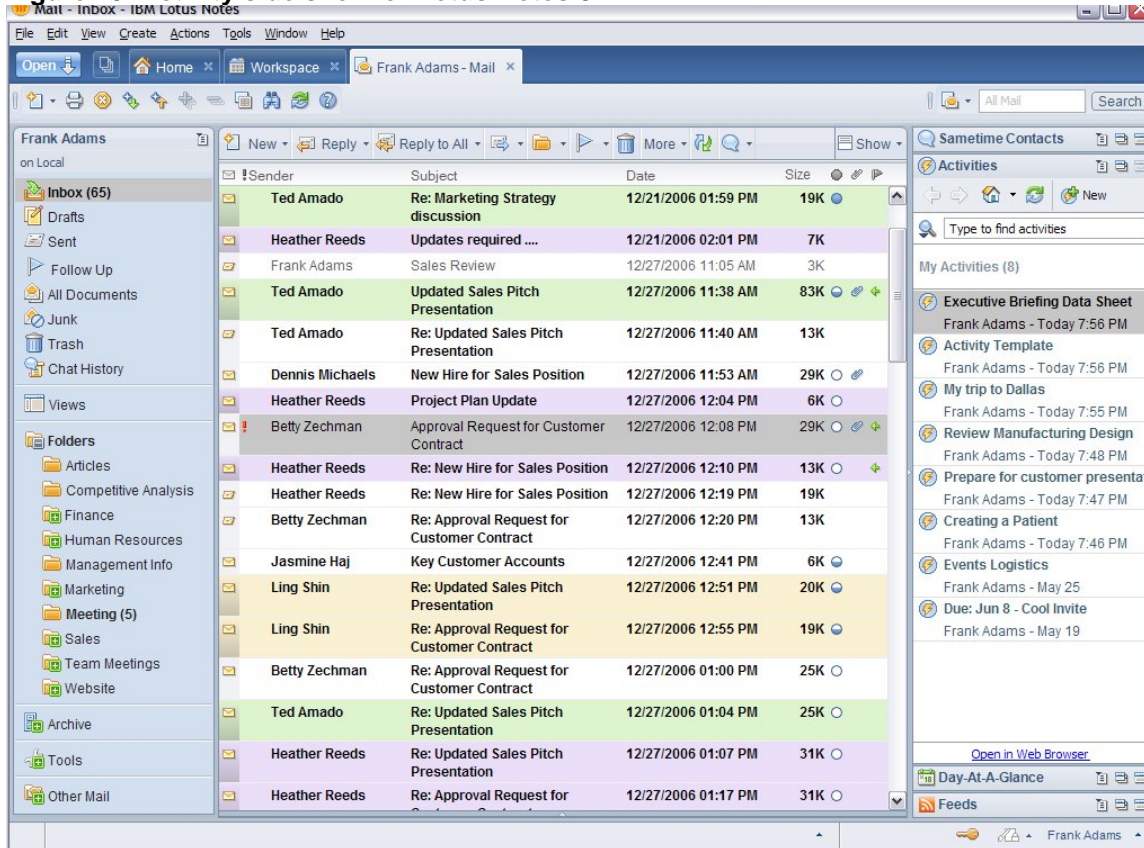
7.2 Integrating Lotus Connections with other applications

Lotus Connections and WebSphere Portal

WebSphere Portal provides core portal services that aggregate application and content, enabling them to be delivered as role-based applications or portlets. All five Lotus Connections services can be deployed to WebSphere Portal. Using the multi-service portlet, you can switch between the Lotus Connections services, allowing the data to be surfaced through messaging, collaboration, business applications, and more in your environment (see figure 26).

Figure 26. Lotus Connections multi-service portlet

You can also use the Lotus Connections multi-service portlet more than once on a WebSphere Portal page. Customize each portlet to your needs; for instance, default Activities to view your ToDo's or Dogear to view your watchlist. The Lotus Connections portlet can also be locked down with an administrative setting so the portlet cannot switch between services or views when, for example, an administrator may want to have a company information portal page. That page could consist of a company profile, company stock, company news, with company related bookmarks and blogs to be added, as shown in Figure 27.

Figure 27. Integration with WebSphere Portal and Lotus Connections
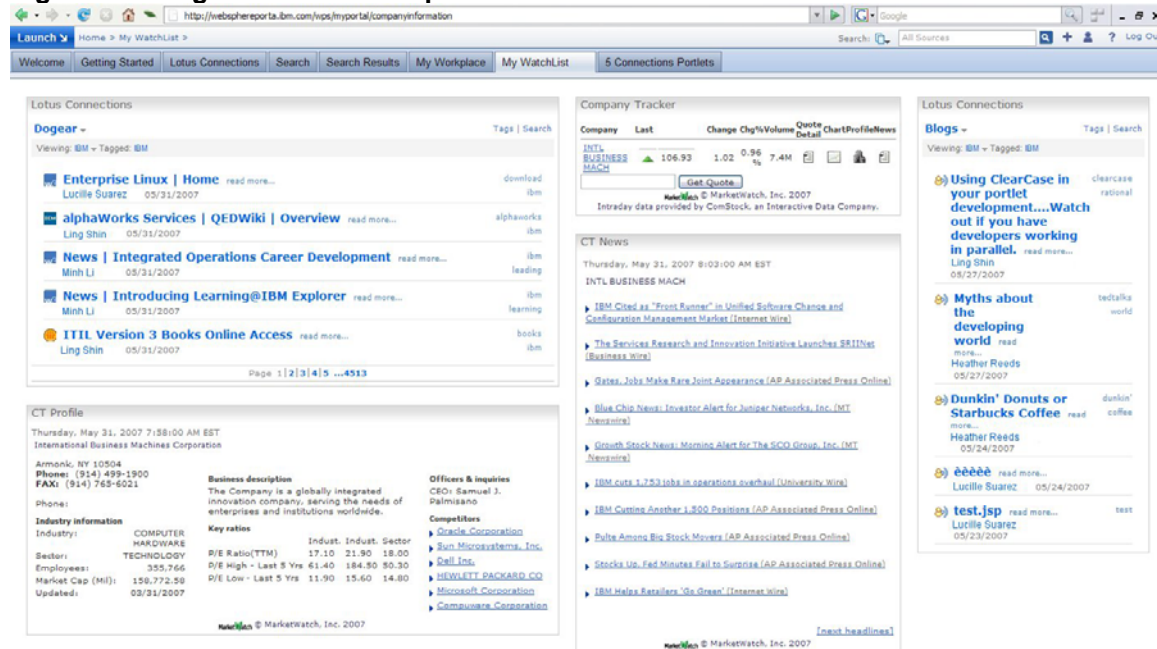
Use feed readers to view Lotus Connections content

Since Lotus Connections is based on open standards and extensible with a REST-style HTTP-based API and support for ATOM feeds, you can surface the content in your favorite feed reader. Lotus Connections generates ATOM-based URL's that allow a variety of software programs to check for updates via feeds (see figure 28). These feeds can then be downloaded by Web sites that syndicate content from the feed, or by feed reader programs that allow Internet users to subscribe to feeds and view their content.

Figure 28. Sample ATOM-based URL
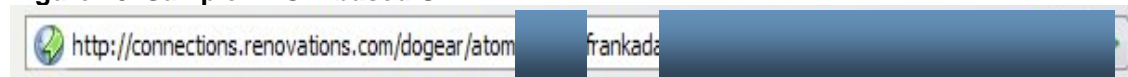
For instance, Frank Adams wants to stay updated with all Ted Amado's recent bookmarks. To do this, Frank just needs to add the ATOM URL for Ted Amado to his RSS Feeds such as Sage (see figure 29).

Figure 29. Ted Amato's bookmarks
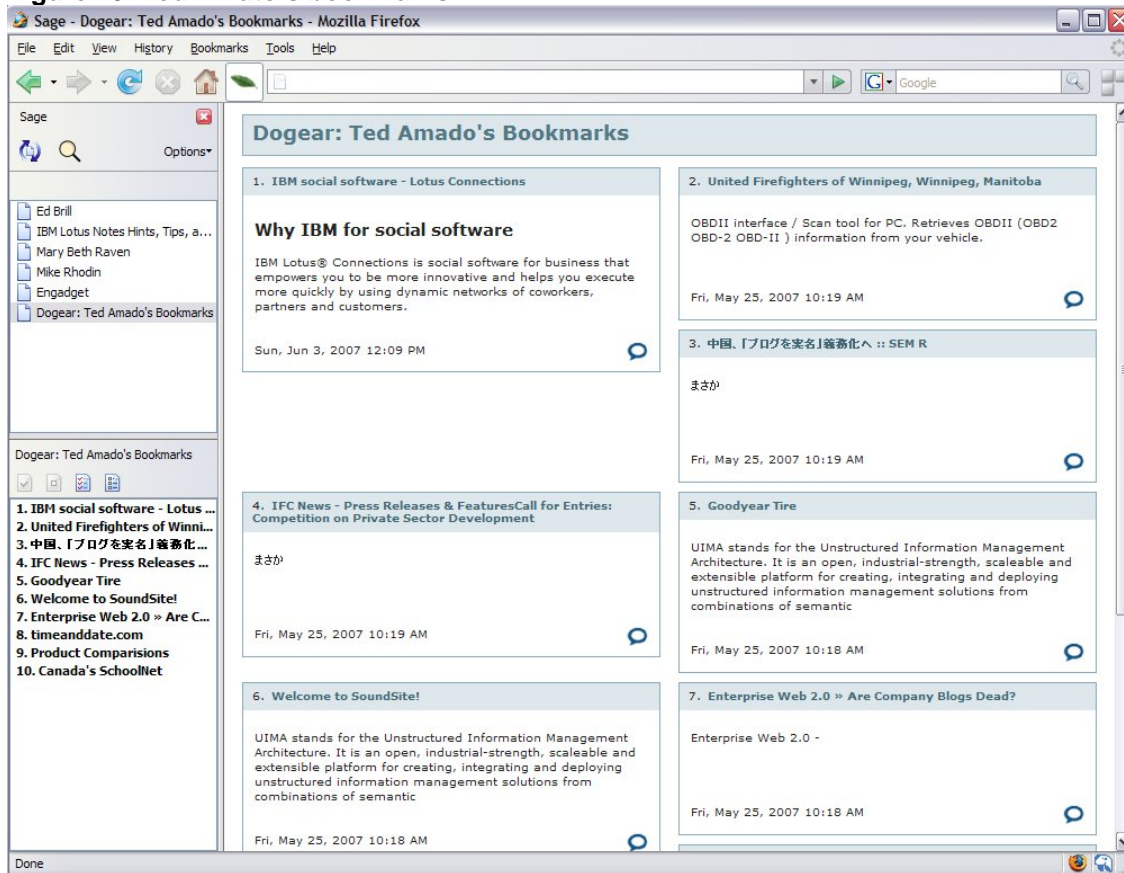
Frank could also use Microsoft Outlook as another feed reader, as shown in figure 30.

Figure 30. Microsoft Outlook as a feed reader

Lotus Connections Mashups
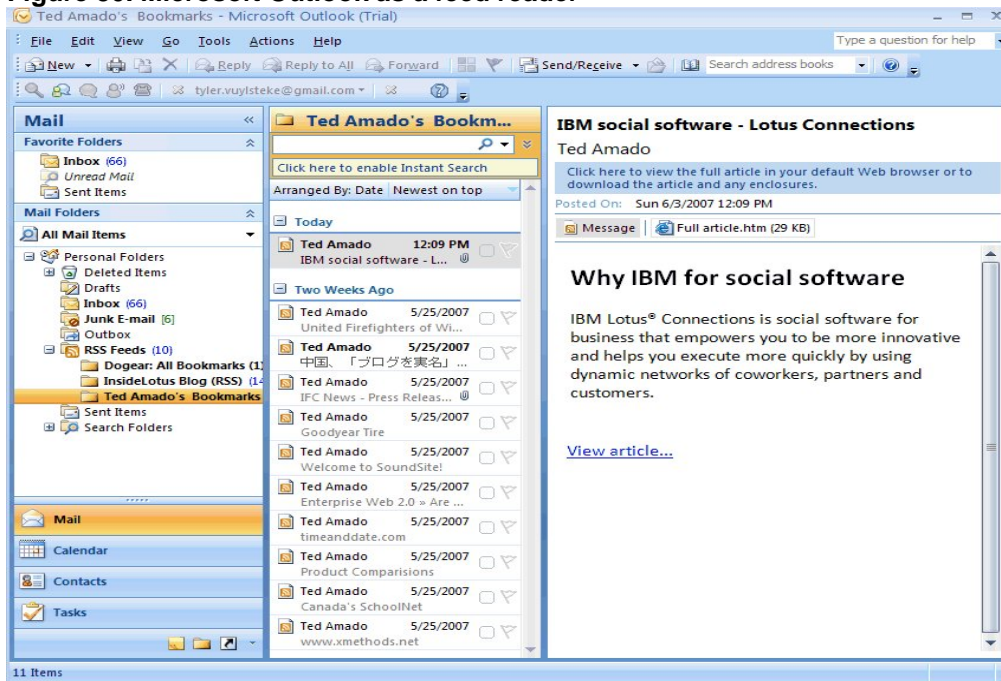
By leveraging the extensibility of Lotus Connections, organizations can mash up their existing applications and Web sites. For example, the Dogear service provides code snippets at the bottom of the Web interface in the "Add to your site" menu option (see figure 31).

Figure 31. How to view Dogear code snippet
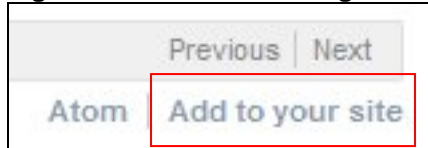
So you can embed a view of the current Dogear page in your own Web page by copying and pasting the code snippet into the HTML source code of your page (see figure 32).

Figure 32. Code snippet

```
<script
   language="javascript"
   type="text/javascript"

src="http://connections.renovations.com/dogear/snippet?tag=java&lang=en_US"></script>
```

Then, the code snippet in figure 32, generated from a Dogear tag search on "java," can be used to build a mashup on a Java-related Web site to include recent social bookmarks that have been tagged with "java" (see figure 33).

Figure 33. Mashup on a Java-related Web site

8. Conclusion

To create a sustainable competitive advantage in the face of relentless change and intense competition, leading companies are focusing on innovation, capturing and deploying the best ideas from employees, partners, and even customers. IBM Lotus Connections speeds growth and unlocks the collective knowledge base within and outside an organization. Lotus Connections is the industry's first platform for business-grade social computing, helping organizations become more agile and execute faster.

9. Resources

Learn

- Lotus Connections product page:
  http://www.ibm.com/developerworks/lotus/products/connections/

- Lotus Connections documentation page:
  http://www.ibm.com/developerworks/lotus/documentation/connections/

- Introducing Lotus Connections for Partners:
  http://www-1.ibm.com/partnerworld/pwhome.nsf/weblook/pub_ben_collab_paxos.html

- Press Release: IBM Announces First-ever Integrated Social Software Platform for Business:
  http://www-03.ibm.com/press/us/en/pressrelease/20941.wss

Discuss

- Lotus Connections forum:
  http://www.lotus.com/ldd/lcforum.nsf