IBM Software Group

IBM

e business software

Collaborative Places for WebSphere Portal v4.1

May 2002

Agenda

- What are Collaborative Places?
- Features and Use of Collaborative Places
  - Types of places
  - Membership
  - Templates
  - Administration
  - Layout/customization
- Summary

Note: Any and all screen shots
subject to change in the final product!

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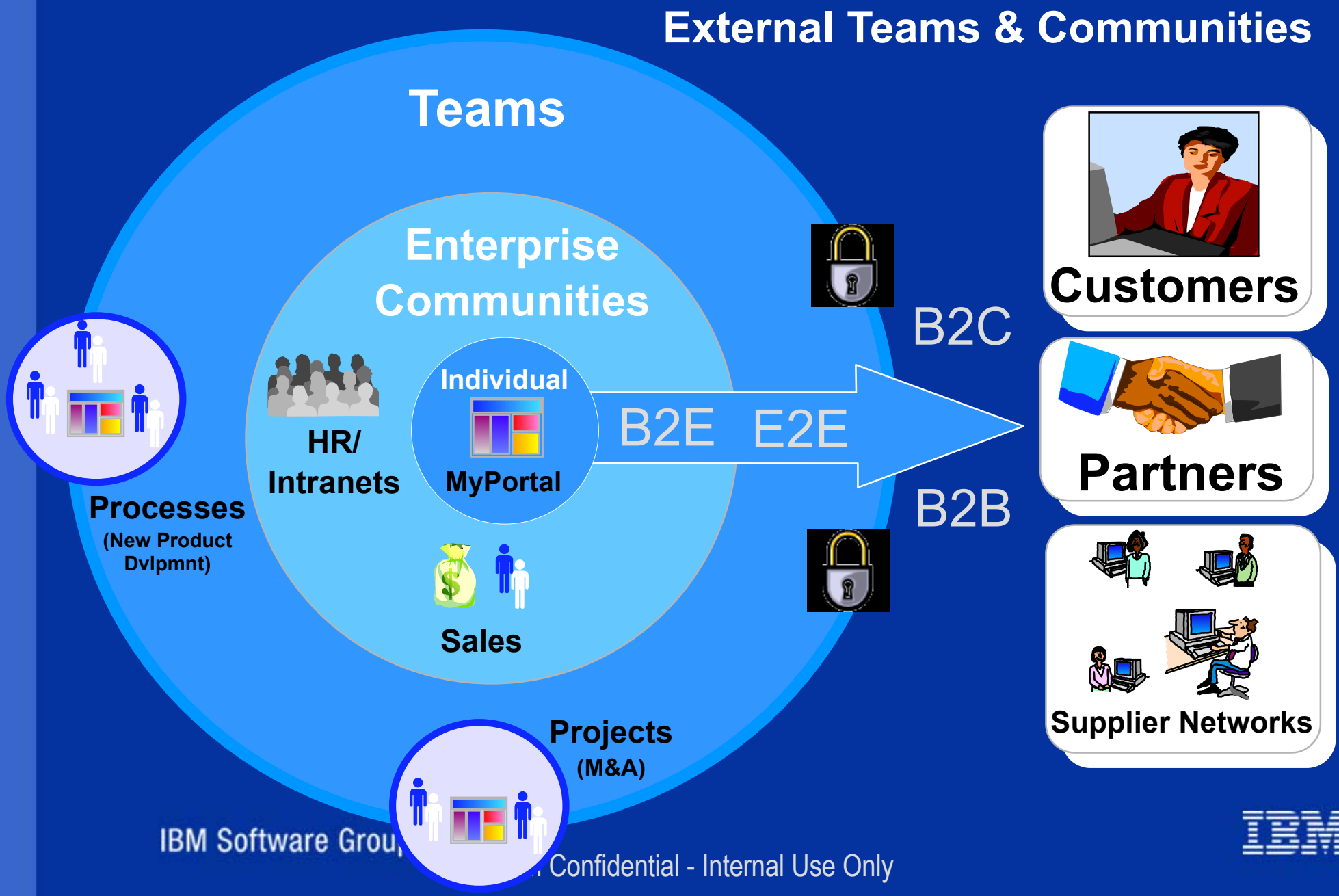
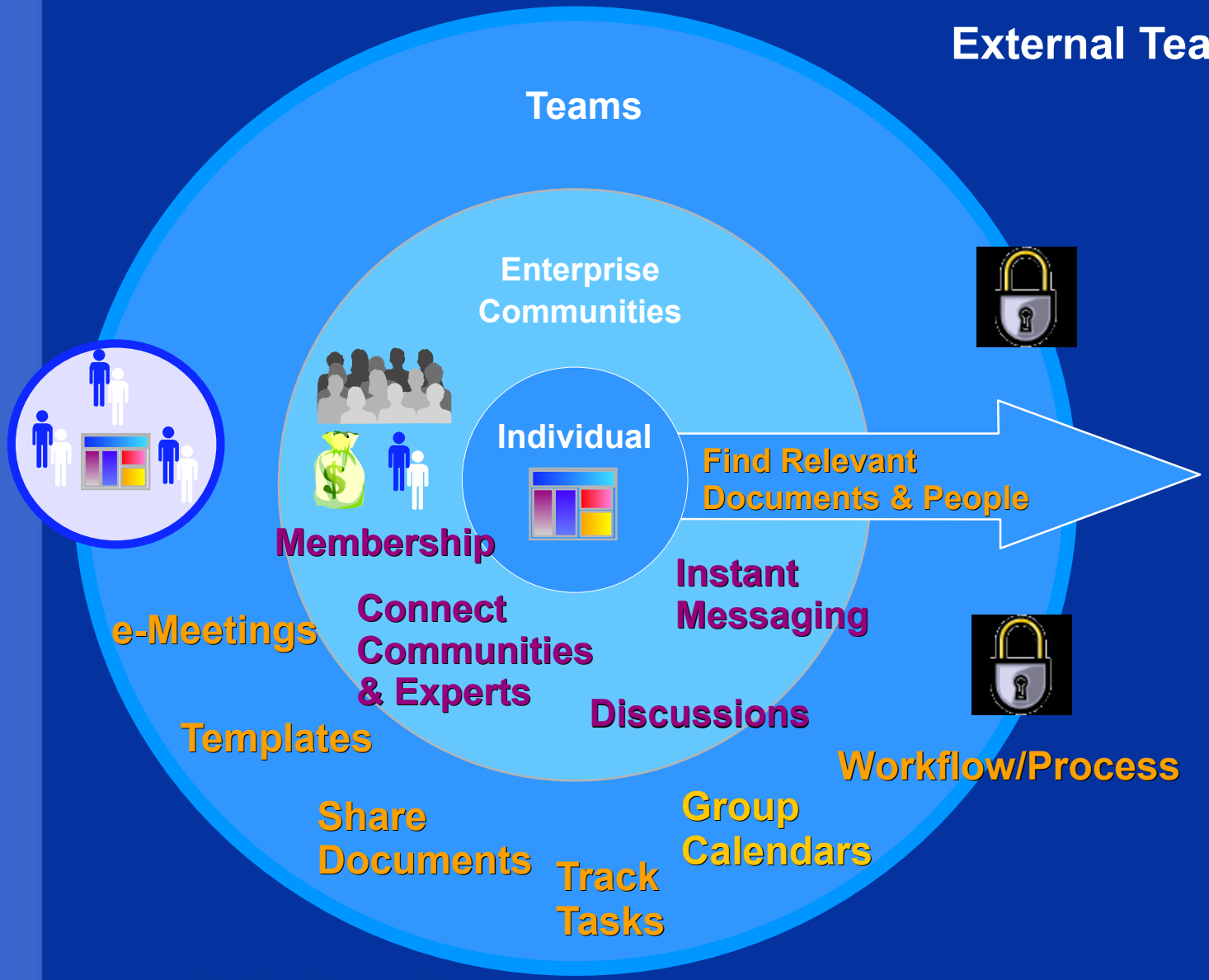
Portal Implementation Progression



Where Does Collaboration Fit?



External Teams & Communities

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Not All Collaboration Was Created Equal

"Some vendors say their portal software supports collaboration if they provide an interface to email and calendaring, open business applications in portal pages, allow for distributed administration or let users customize layout and information delivery; however, **collaboration involves a lot more**."

--"Enterprise Portal Vendors Lack Agreement on Collaboration Features"
Laura Ramos, Giga
December 2001

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Portal Collaboration - Breaking It Down

Generation 2: Action

+ Embed Team Tools, Instant Messaging, eMeetings into workspace
+ Portlet and Community level functionality

Value: Increases usage and knowledge sharing of information captured and shared in portal

Lotus/IBM in market 1+ years

Generation 1: Access

+ Portlet access to email, calendar, to do, groupware apps
+ Side by side applications

Value: Single interface to access all resources

Most Vendors

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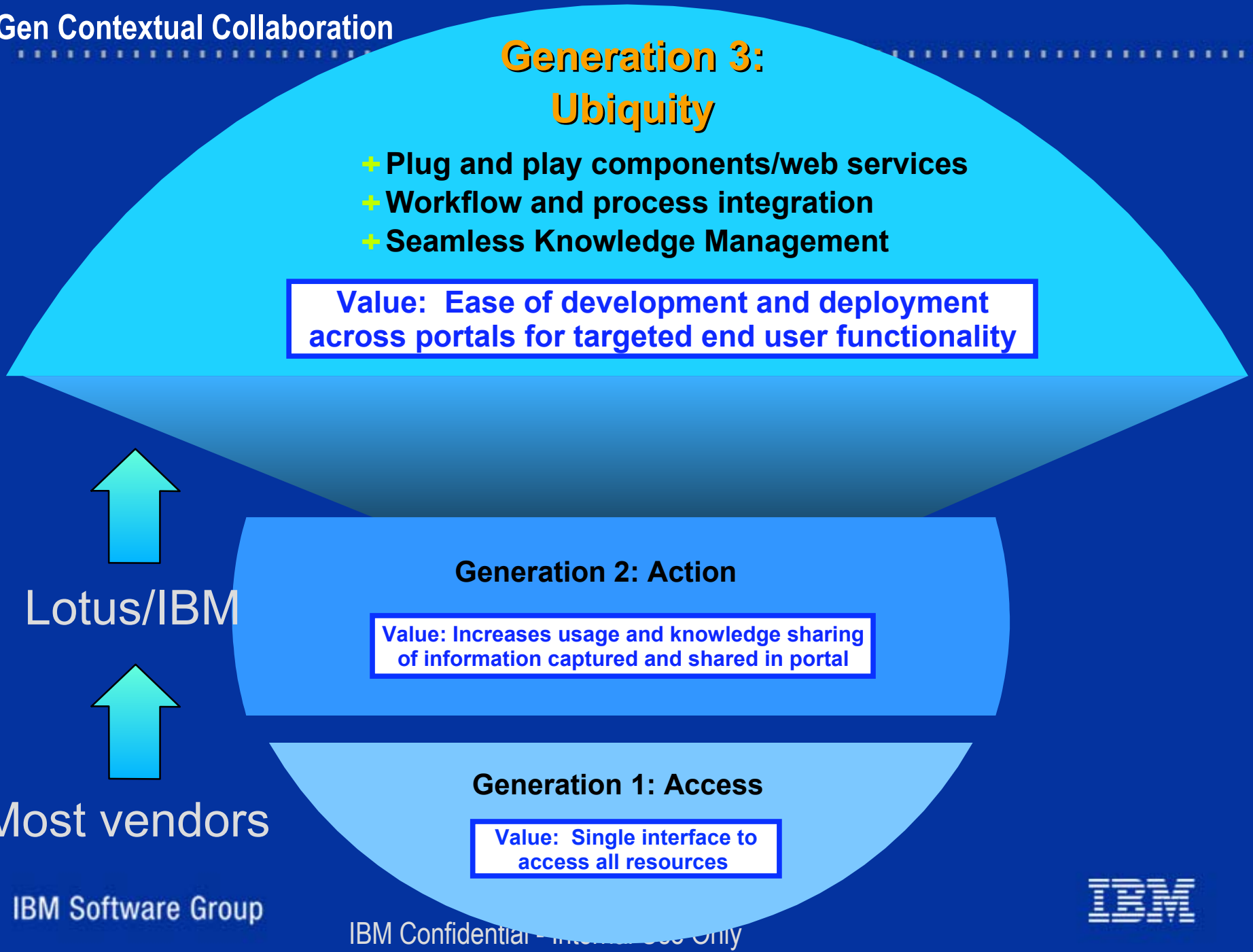
The Future of Portal Collaboration

Generation 3:
Next Gen Contextual Collaboration



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What are Collaborative Places?

- Places are special page groups
  - Collections of related tools, applications, pages, and portlets dedicated to a certain topic
- Personal places
- Shared team and community places
  - Membership and role-based security model
  - Built-in collaboration tools and online awareness
  - Shared Bookmarks
- Customized by administrators or end users based on role
  - Delegated Place management to business users
- Template Based
  - Easy to create new places from templates
  - Save and re-use

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Get Yourself Organized!

- Personal Place
  - Administrator controls who gets a personal place
- Your e-mail, calendar, to do's
- Corporate Information
- Personal Place built from the Personal Place Template
  - more on templates later
- Personal buddy lists - My Contacts
- Add customized content via portlets

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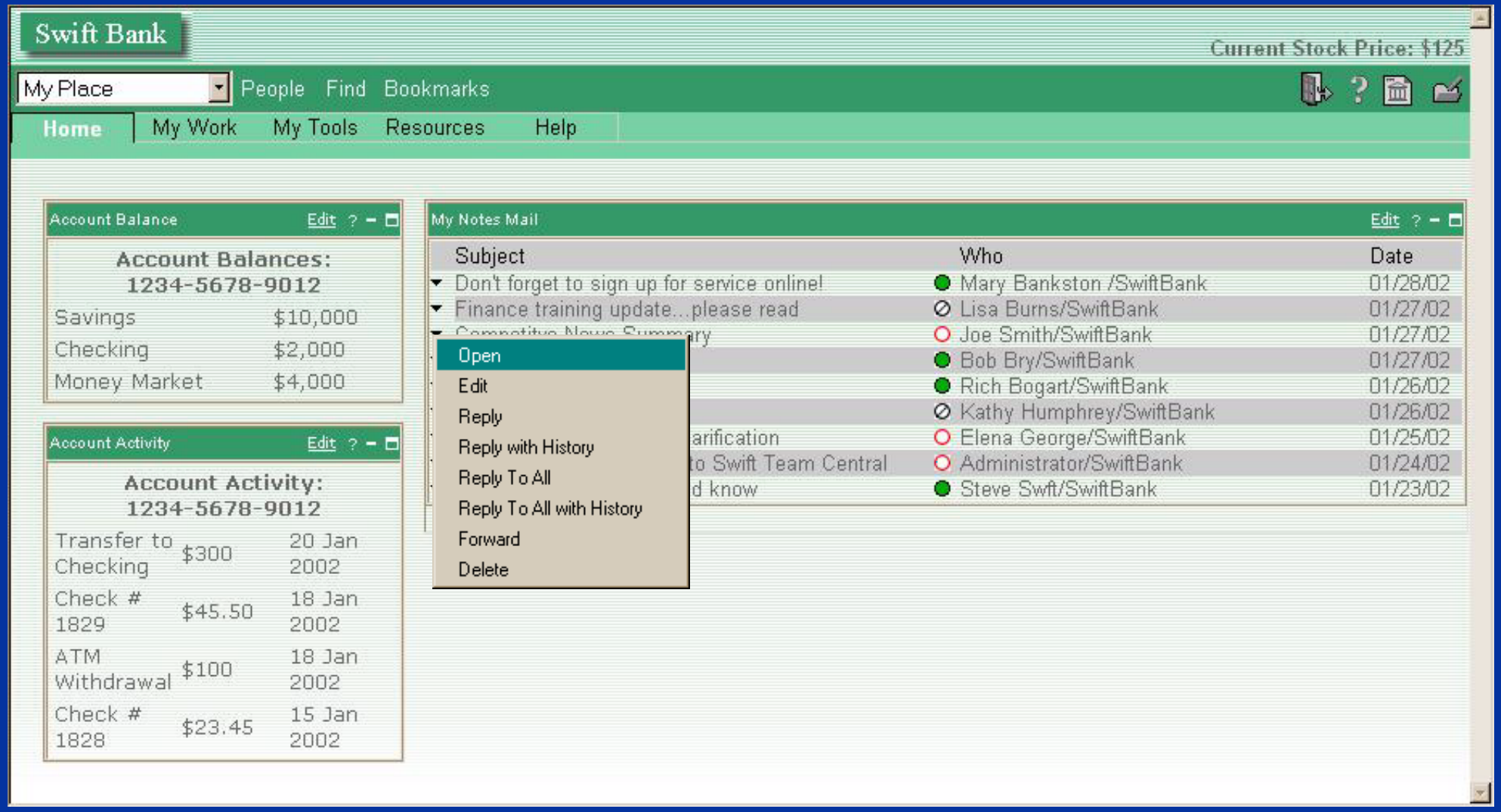
My Place Example Screen Shot



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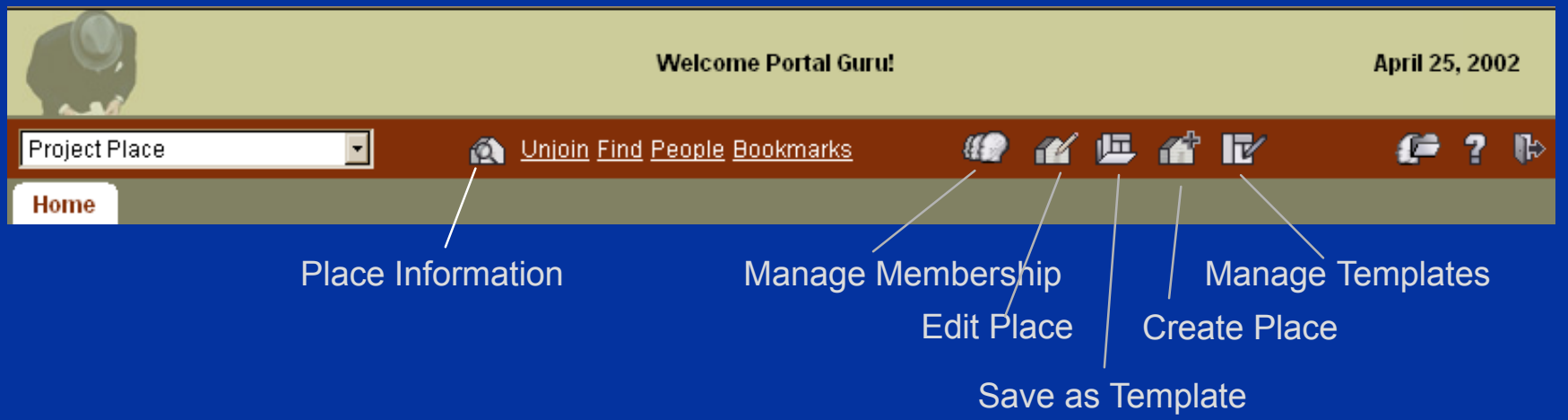
Action Bar in WP Extend



Quickly Create New Shared Places from Scratch

- Administrator controls who can create new Places
- Templates define the initial pages and portlets
- Types of Places
  - Public - open to all logged in users - e.g. Sales Place
  - Restricted - members only, controlled by the Place Manager - e.g. Merger Place
  - Anonymous access - e.g. Corporate Intranet Home
  - Mandatory - users may not 'unjoin' - e.g. Department Intranet
- Public Places may be joined by the user
  - Discovered via the Place Catalog
  - Indicates the user's interest
  - Adds the place to the place selector drop-down
- Restricted Places are for members only
  - Access controlled by the Place Manager

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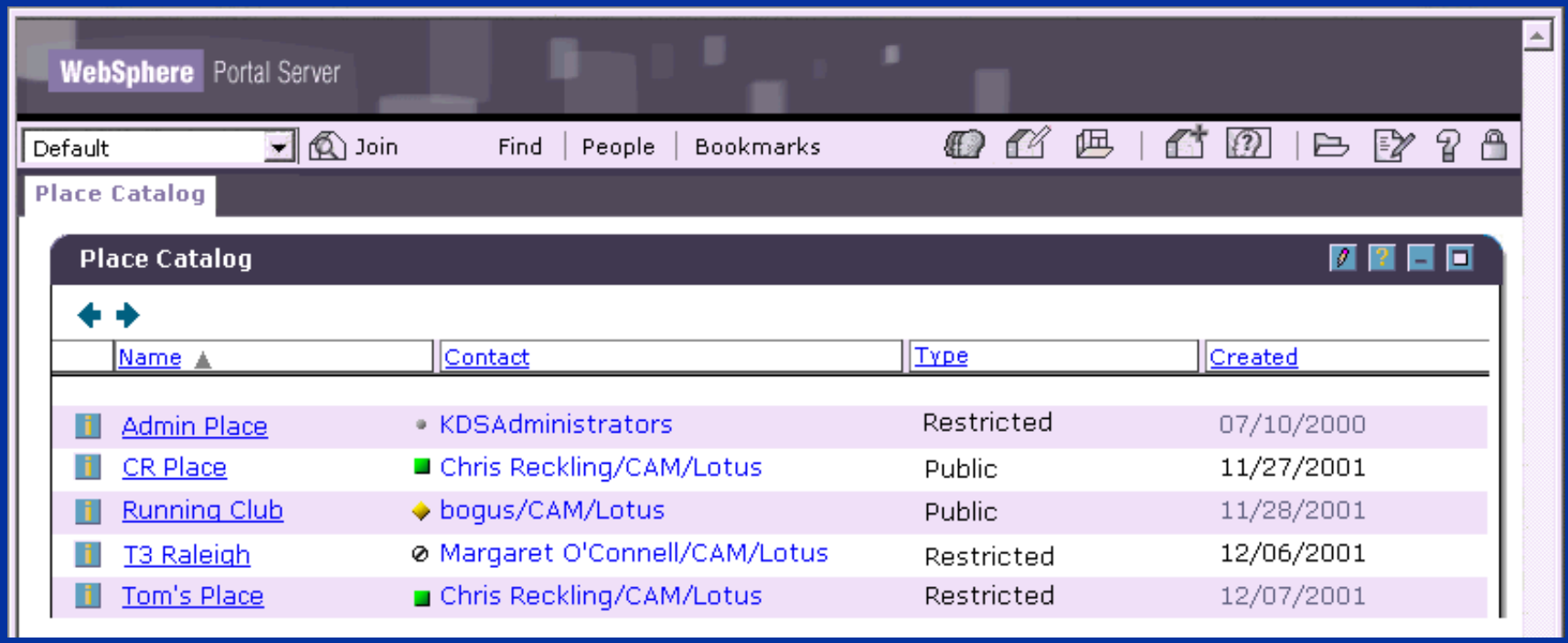
Place Catalog



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Creating a New Place

- Administrator setting
- Choose a template
- Choose a theme
- Choose type of place
- Add members
- Add shared Bookmarks

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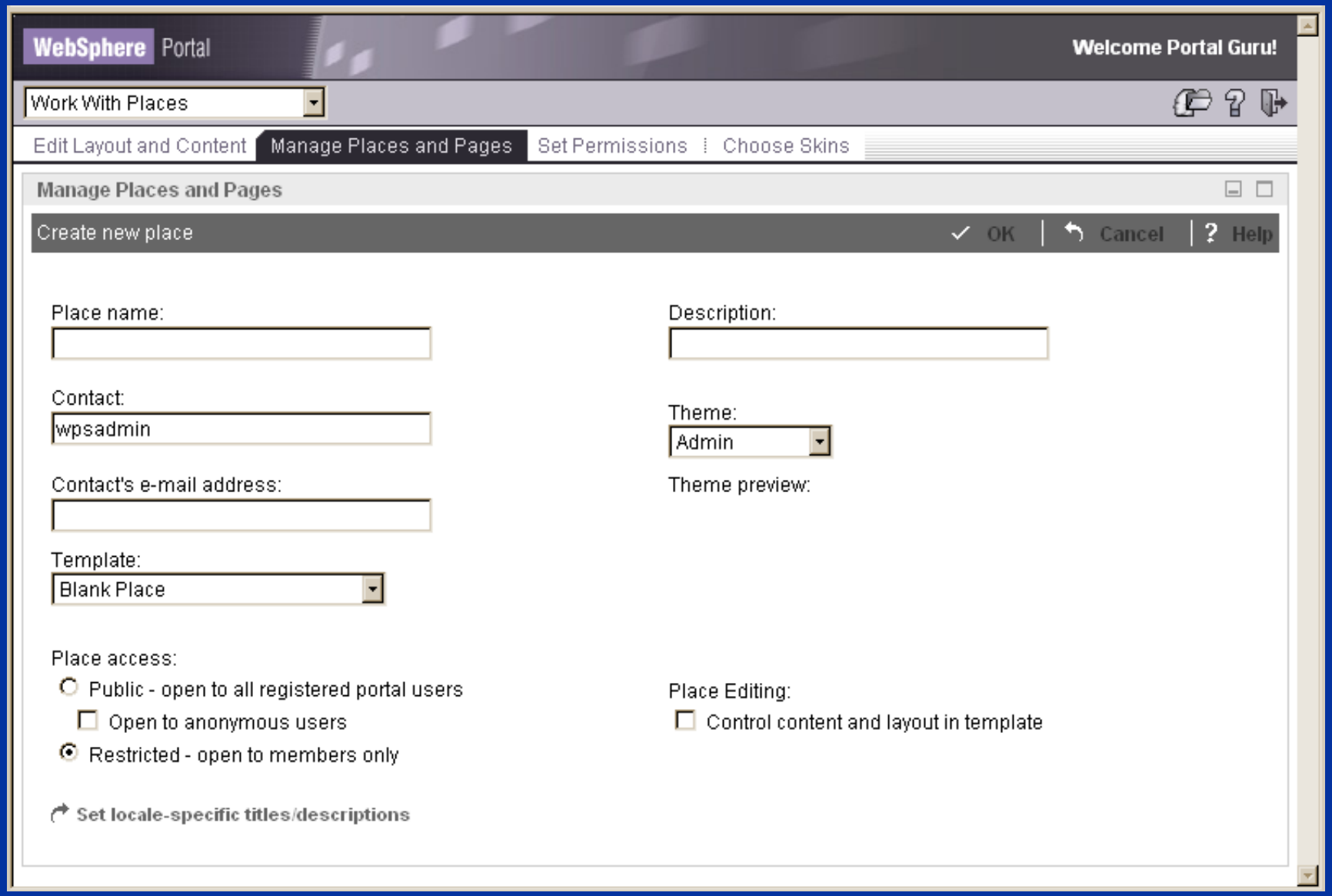
Create Place Screen



Place Membership Roles and Access

- 3 levels of access
- Place Manager
  - May create new places
  - Manages place membership
  - Manages layout and content
  - Manages place-based bookmarks
- Place Designer
  - All of above except manage place membership and create new places
- Place Participant
  - May visit and join public places
  - Manages personal place
- Additional rights may be granted page by page
  - Example: NA Sales Mgr can edit the NA Sales page, but no other pages

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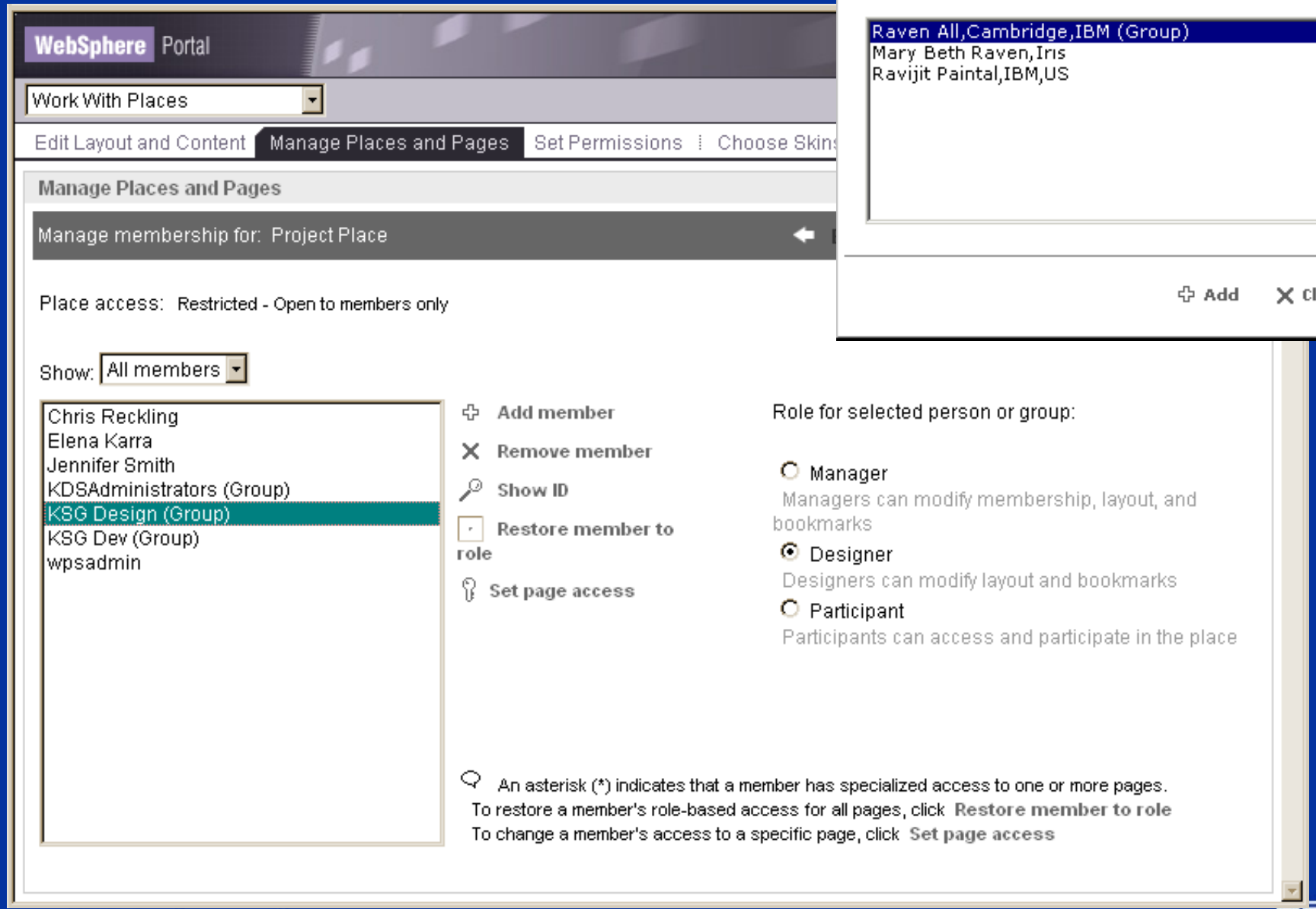
Adding Members



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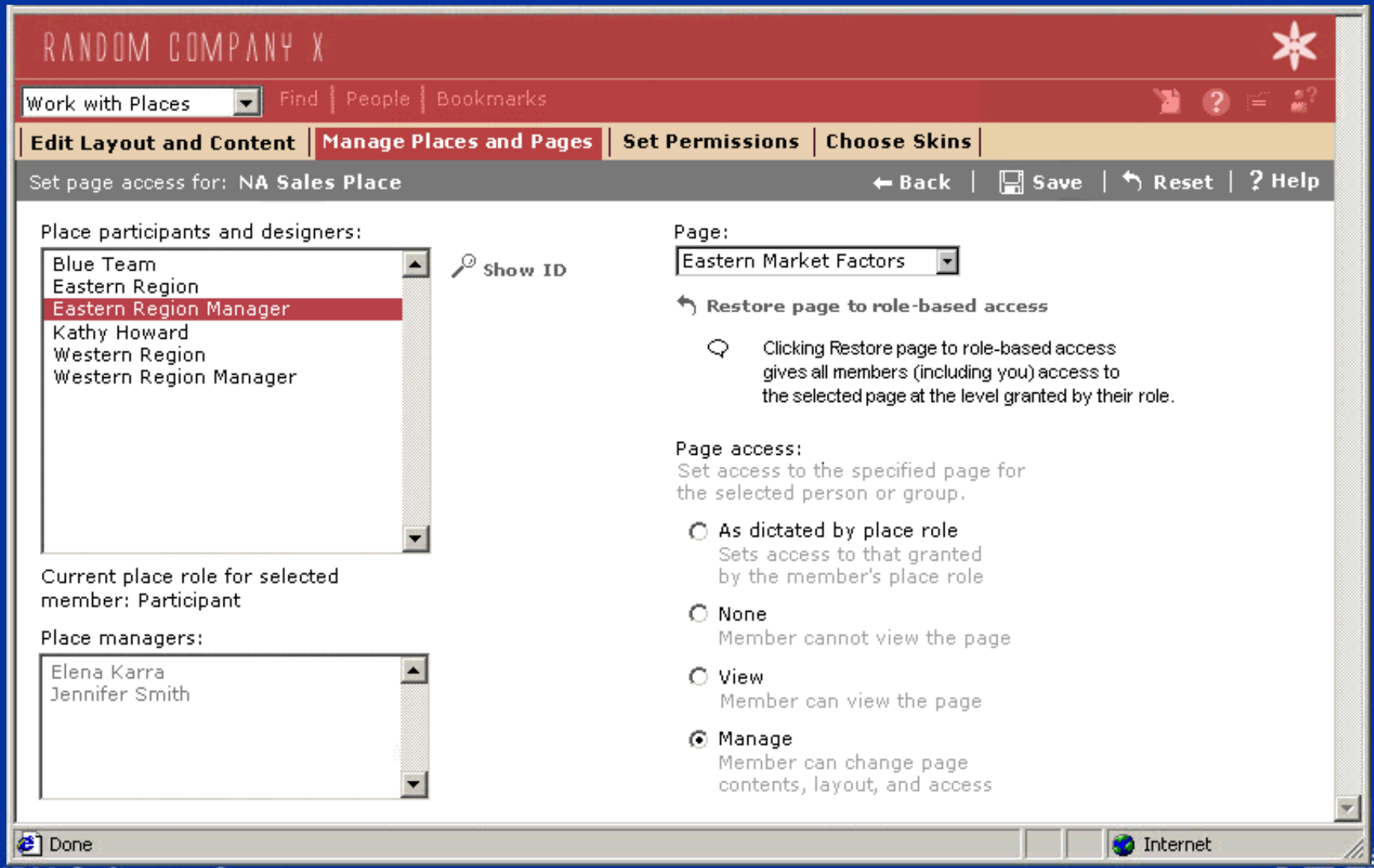
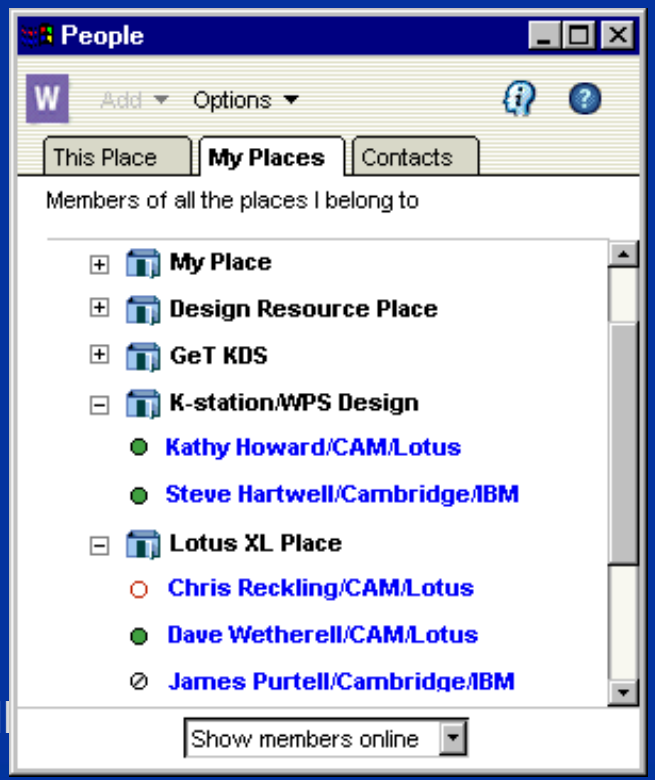
Set Page Access

- Delegated page management within the place



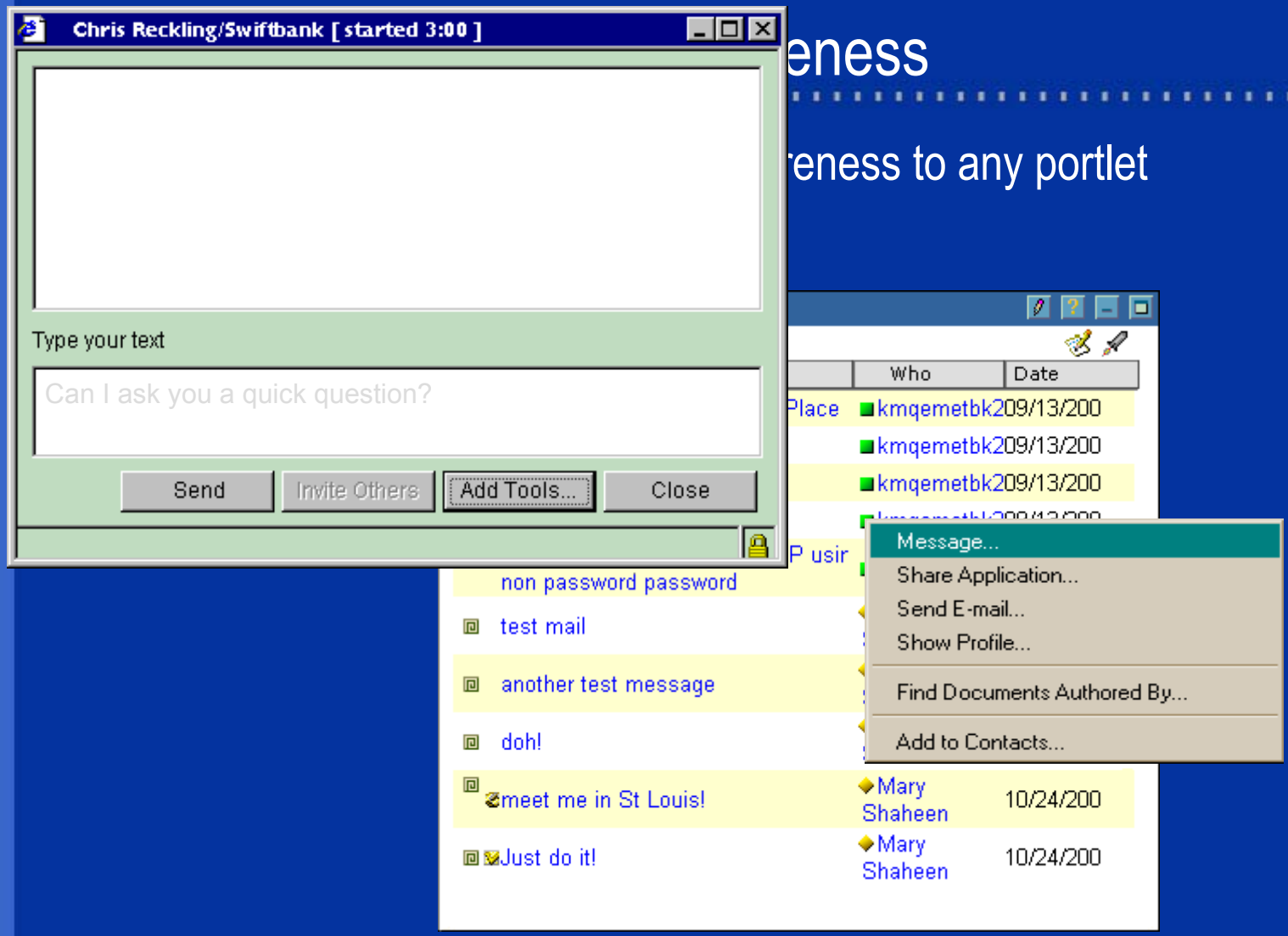
Integrated Online Awareness and Chat

- Facilitates communication among portal users
- Show who's online in portlets
- Place-based awareness via People Awareness Component (PAC)
  - Show who's online and in this place
- Personal Buddy Lists
- Uses Lotus Sametime server (license and software included)
- Third parties may use Collaborative Components to add awareness to their own portlets



eness

eness to any portlet



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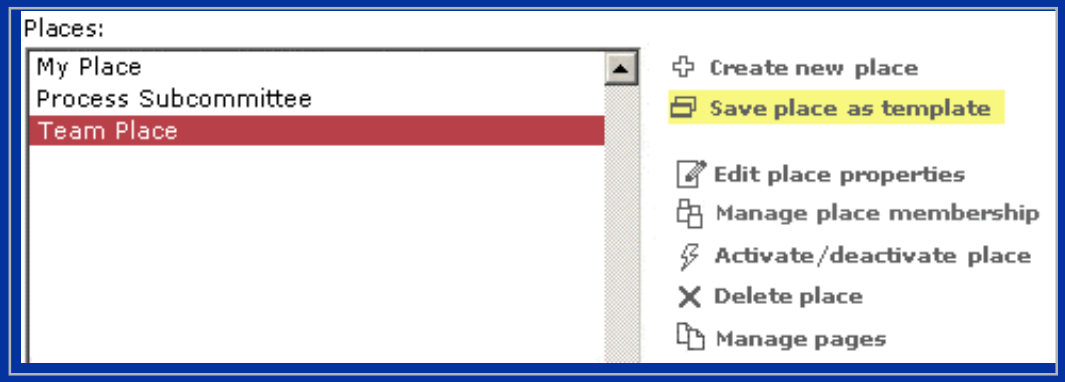
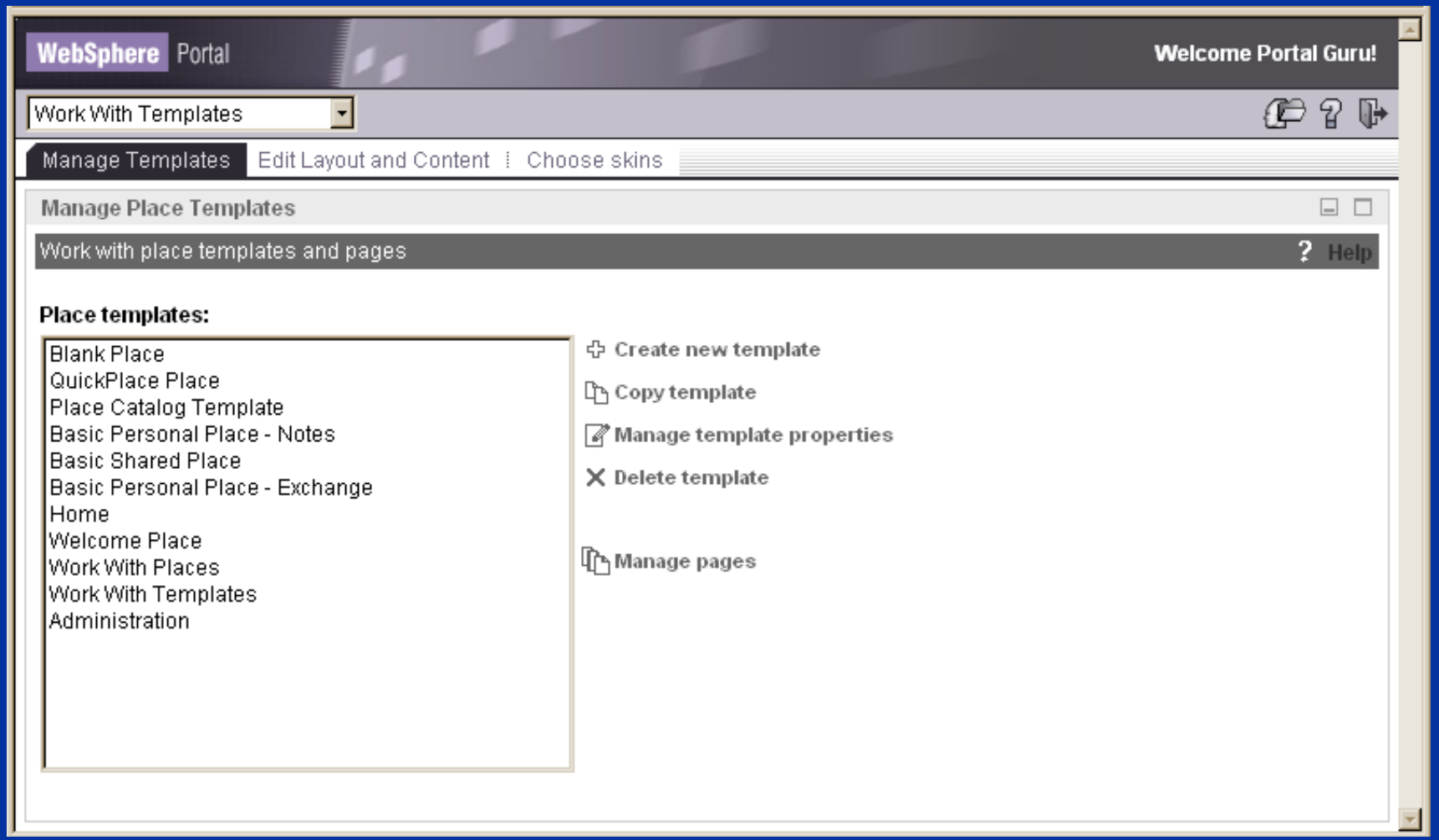
Place Templates - Reusable Assets

- Removes the pain of Place creation, starting from scratch
- Rollout custom solutions, ensuring consistency across organization
  - Corporate Template
  - Project Template
  - RFP Template
  - Community of Practice Template
- Administrator setting to allow creation and editing of templates
- Similar layout and content controls to "Work with Places" function (see customizing section)



Work with Templates



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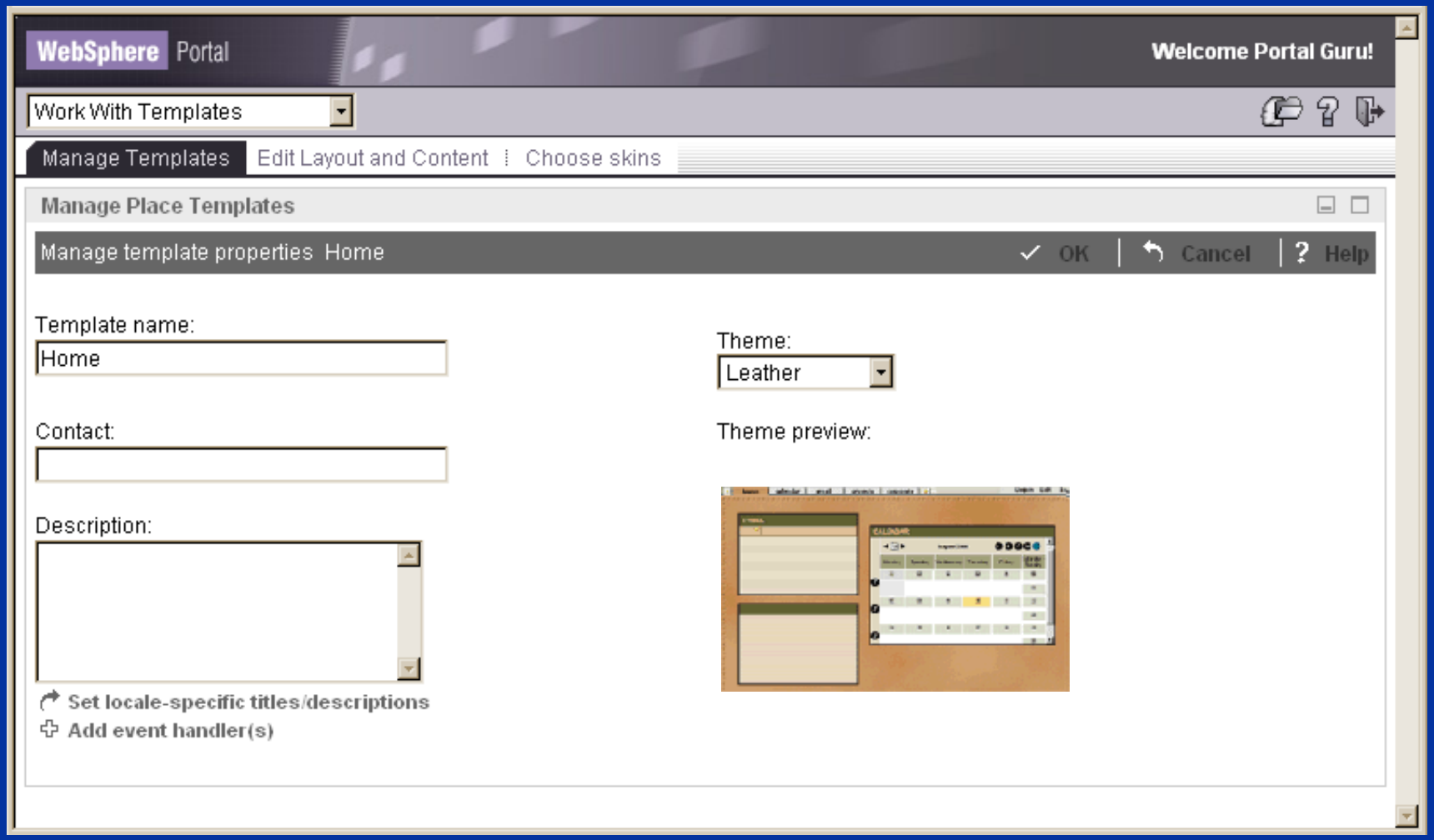
Template Properties or Create New Template



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Types of Templates - Out of the Box

- Shared Place templates
  - Welcome
  - Basic
  - Blank
- Personal Place Template
  - Basic Personal Place - Lotus Notes
  - Basic Personal Place - Microsoft Exchange
- QuickPlace Template
  - creates a new QuickPlace teamroom for use in the portal
- Assign event handlers to the template
  - for example, allows the developer to add functionality to the portal behind the scenes
  - our own code uses this function for the create QuickPlace function when using the QuickPlace Template

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Customization

- Manage Pages and Places
- Page layout
- Content and layout permissions

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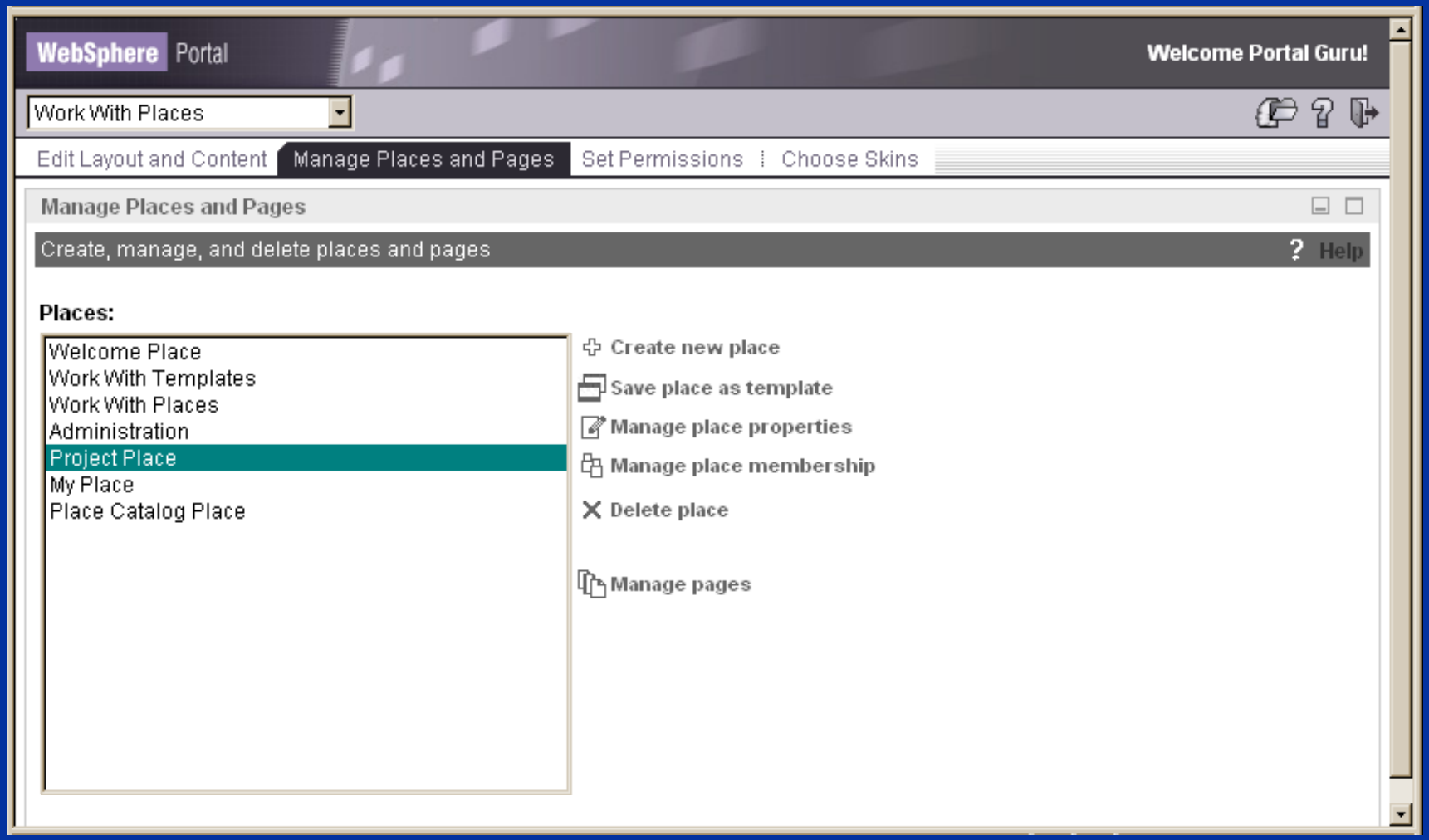
Working with Places

- Shows places you have access to manage or edit



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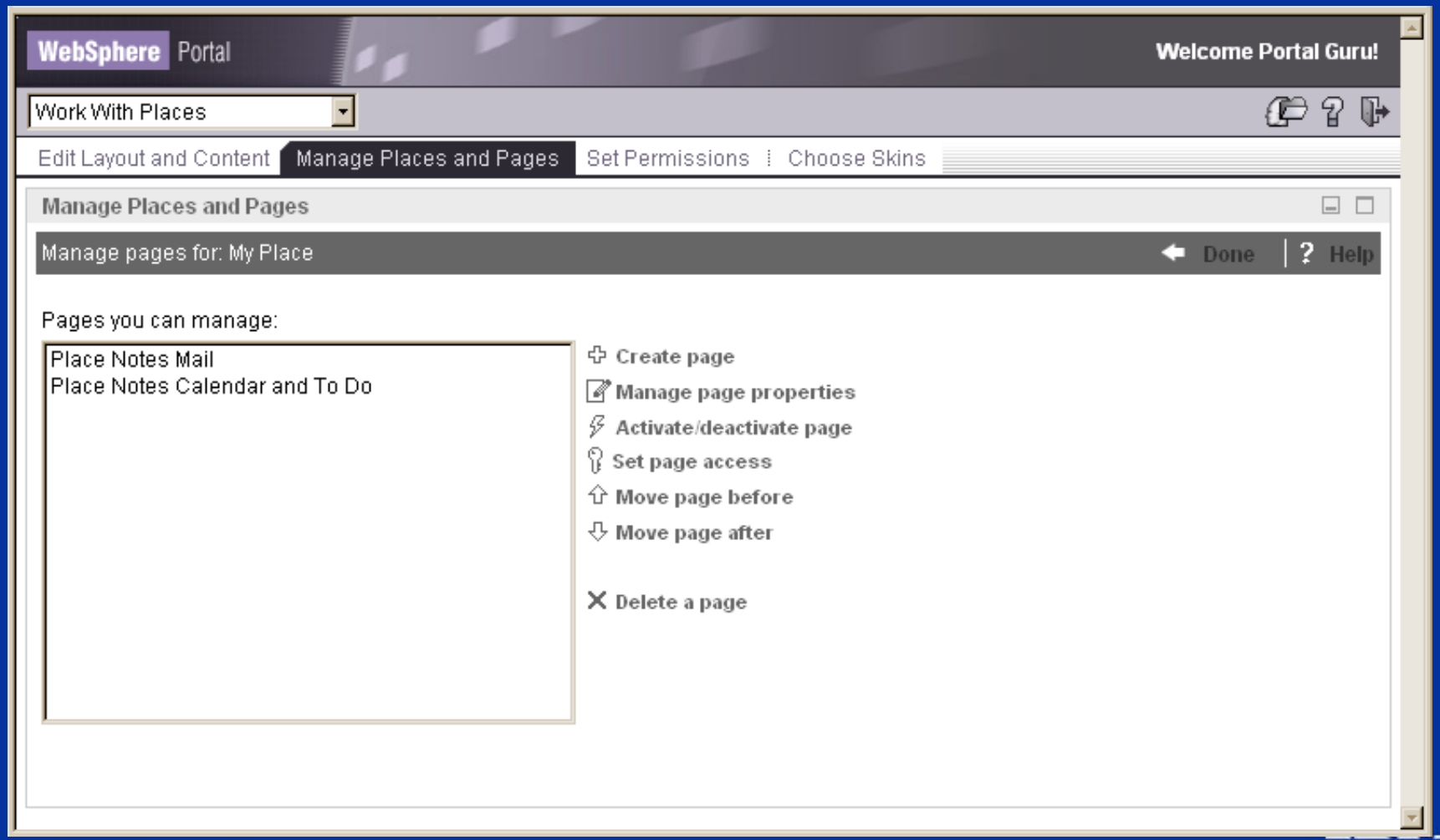
Manage Pages

- for example, to re-order the pages, add new page, change it's name, delete, activate



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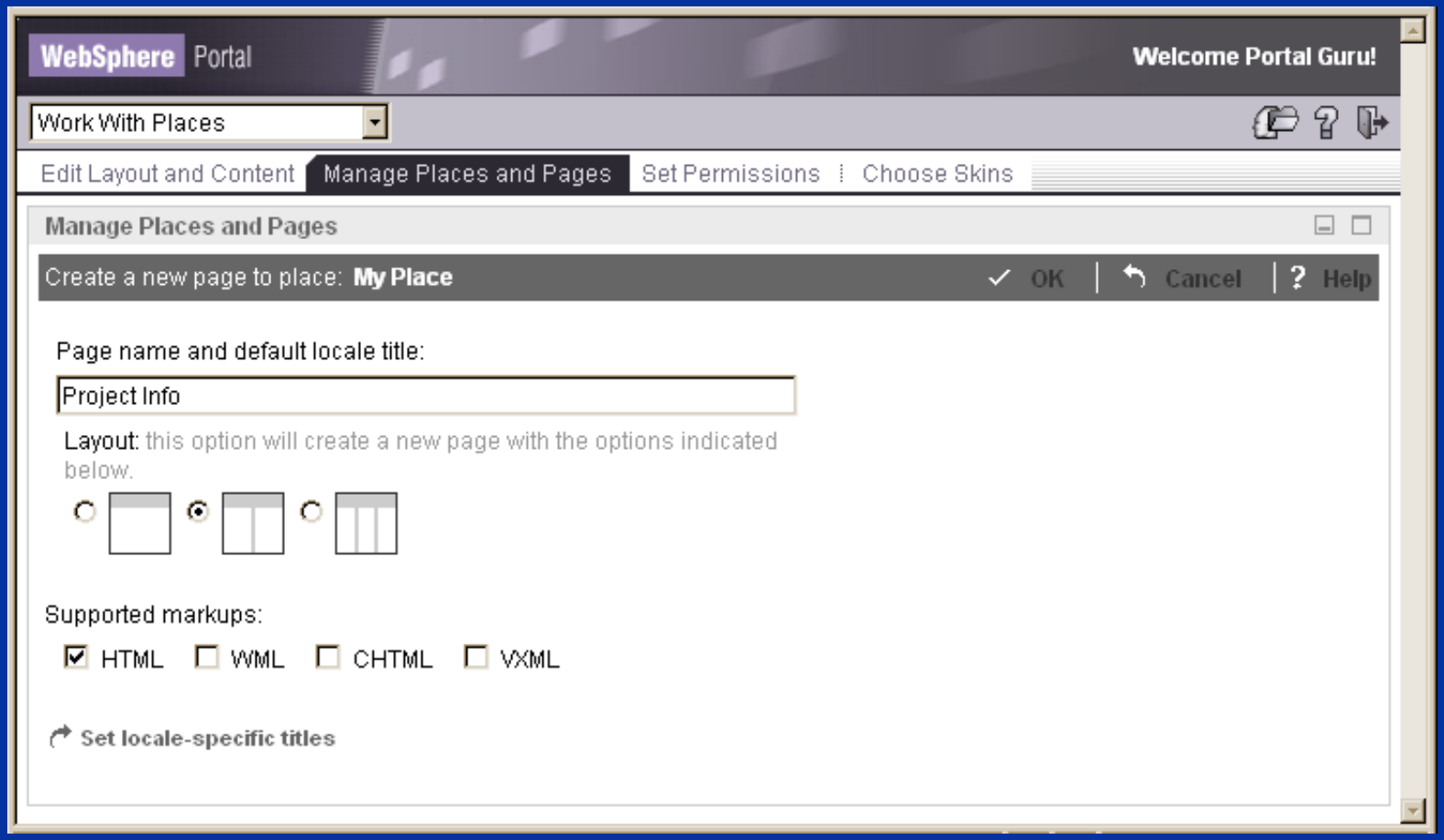
Create New Page



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Content and Layout

- Determine how a page is structured
  - which portlets are seen
  - set column widths
  - arrange portlets
  - create column and row containers
  - each page group can have its own theme
  - each portlet can have its own skin

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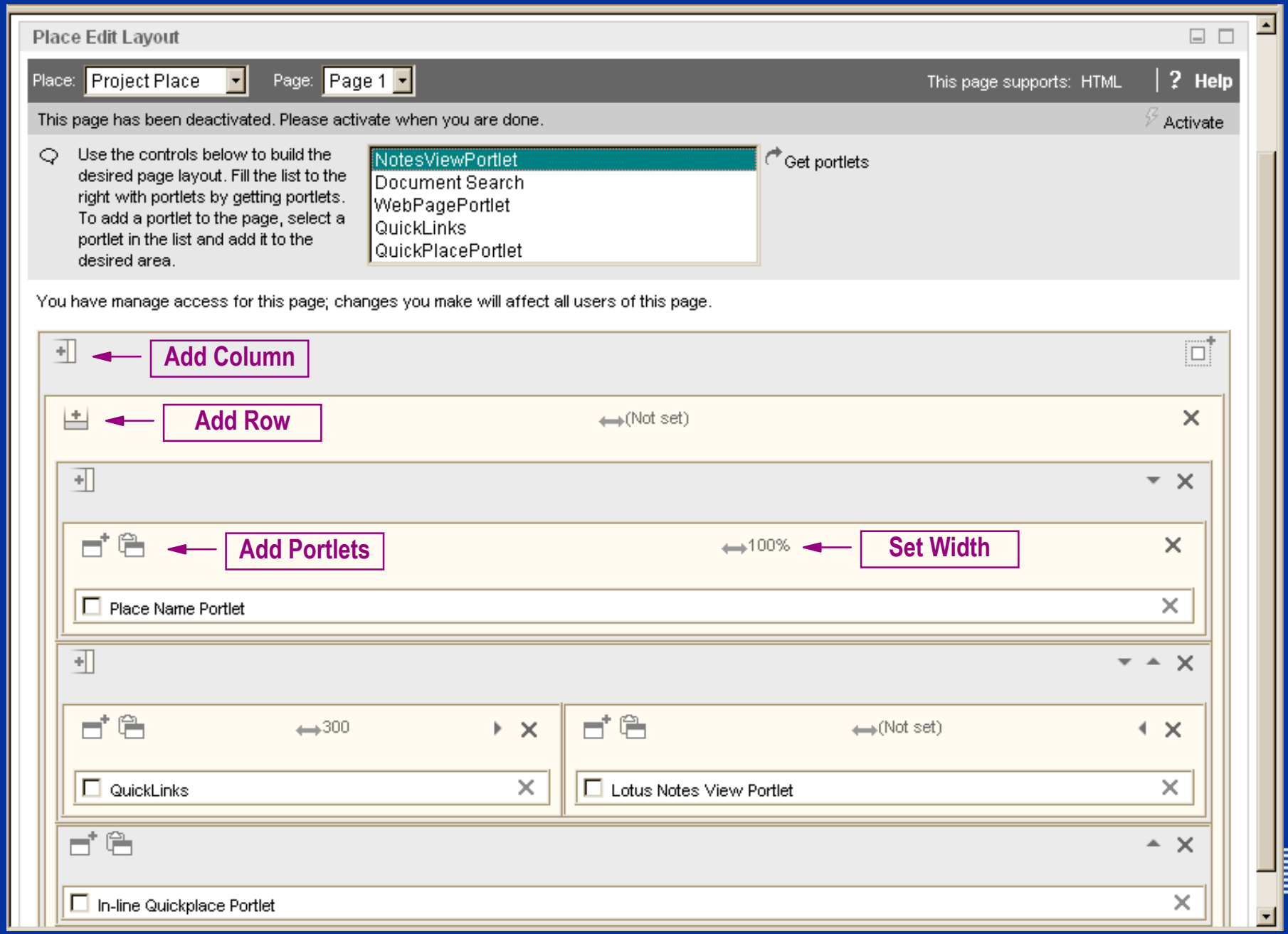
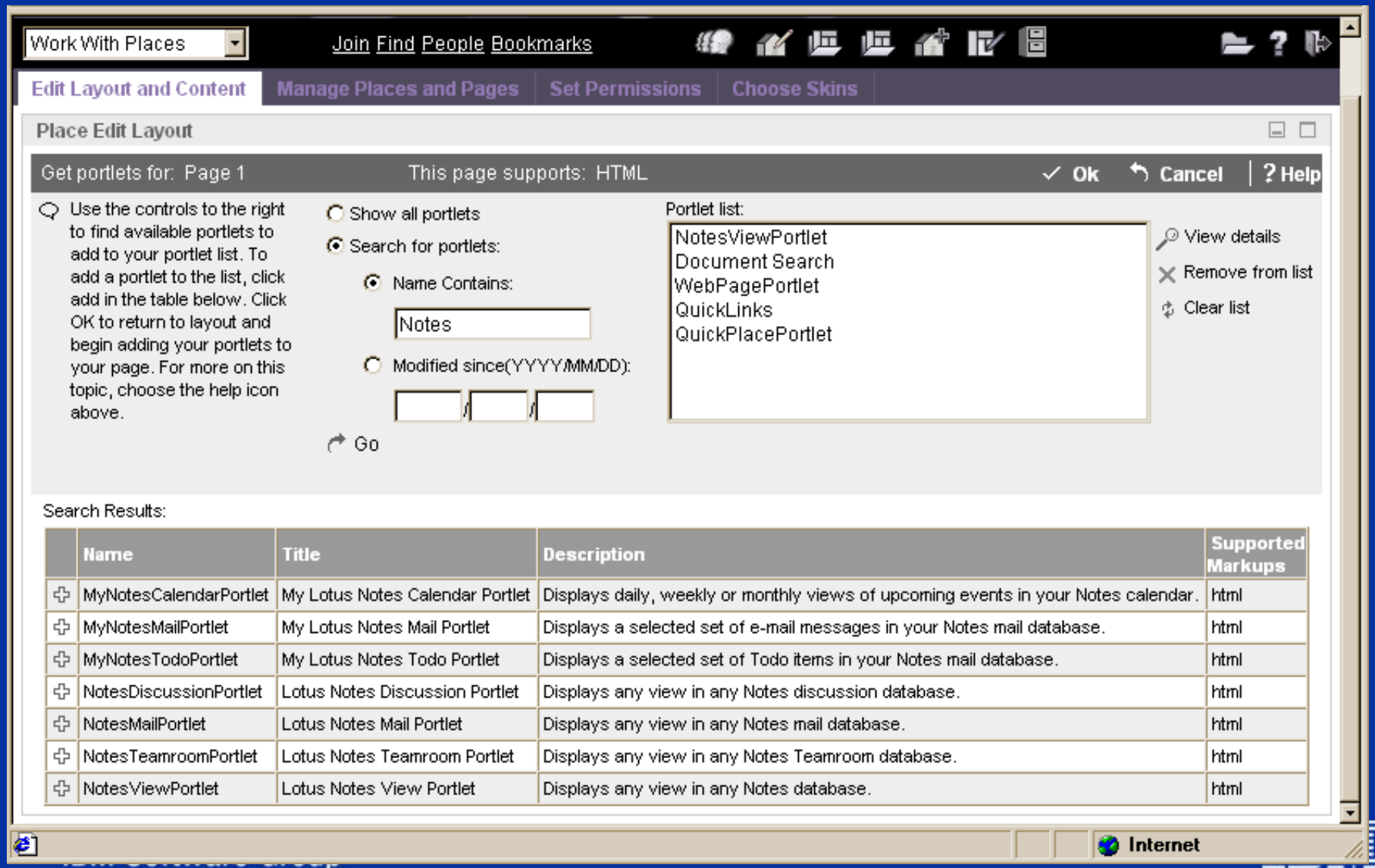
Page Layout Controls



Get Portlets Window

- Search for portlets to add to the page



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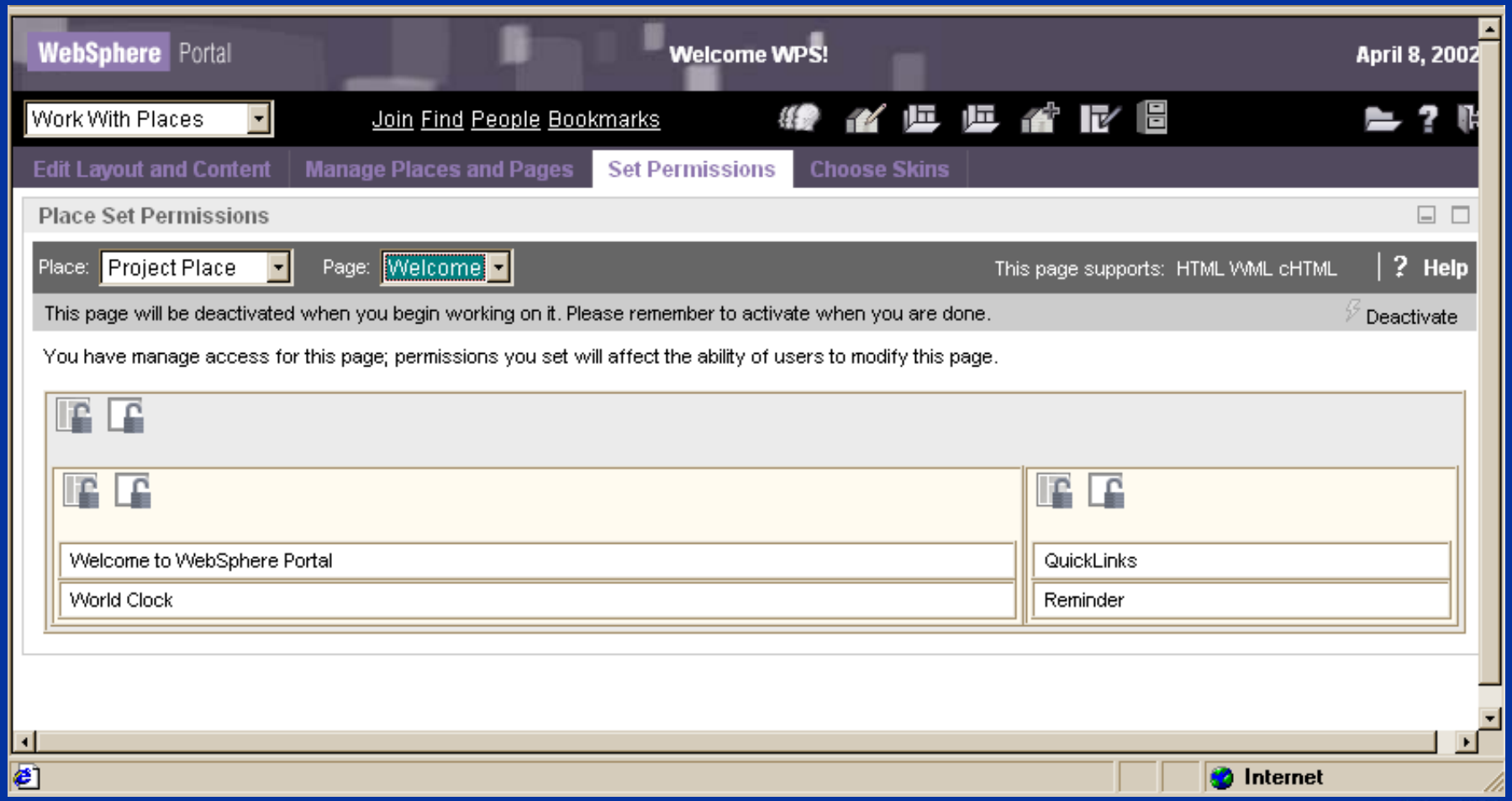
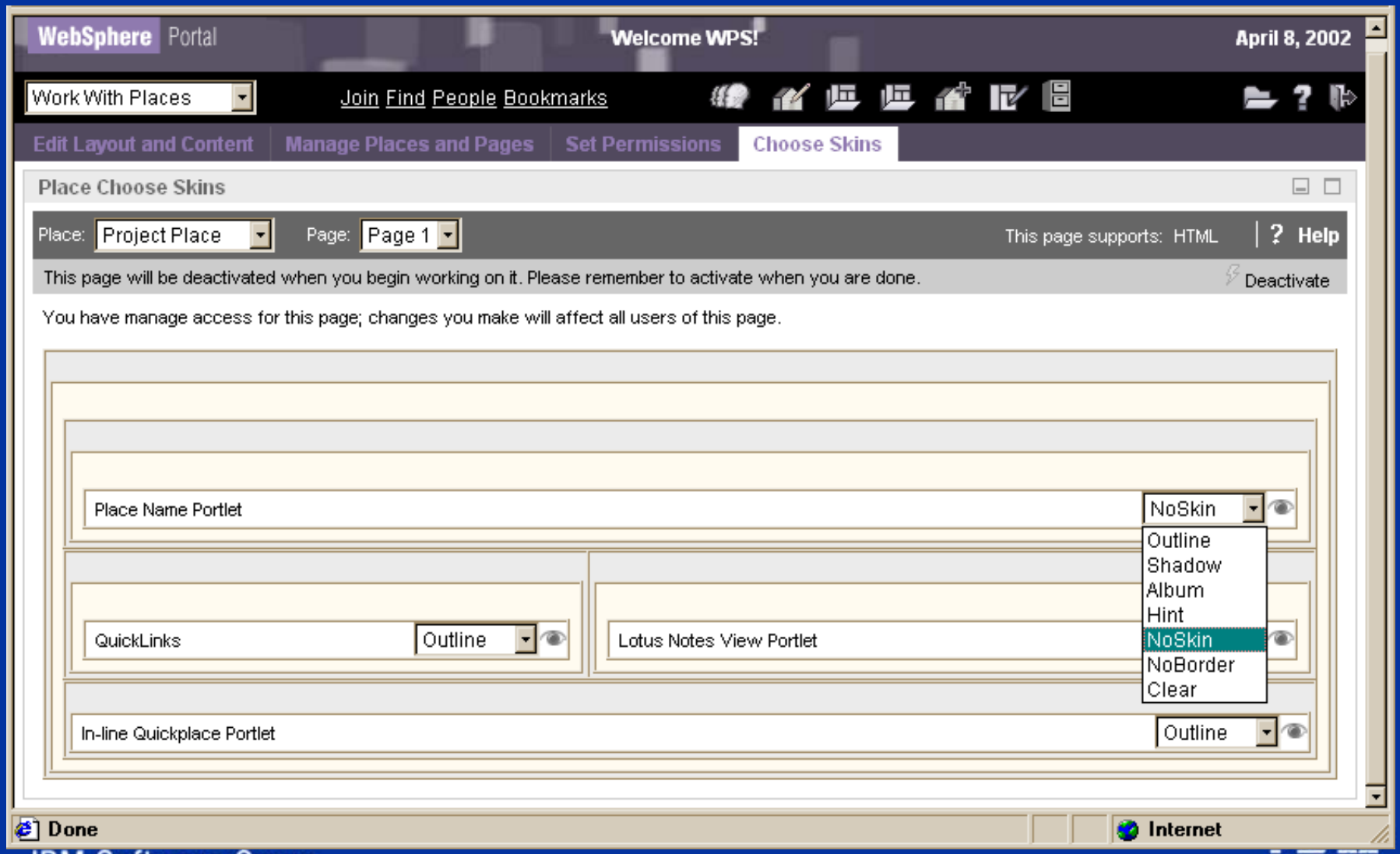
Page Permissions

- Lock content - prevents users from modifying portlets
- Lock layout - prevents users from modifying page layout
- Lock portlet - prevents users from modifying specific portlet



Skins

- Portlet decorations



Themes

- Easy to re-brand or get a good look "out of the box"
- 5 themes in Enable
- 30 additional themes in Extend
- Vertical and horizontal layouts
- Collection of JSPs, stylesheets, and images

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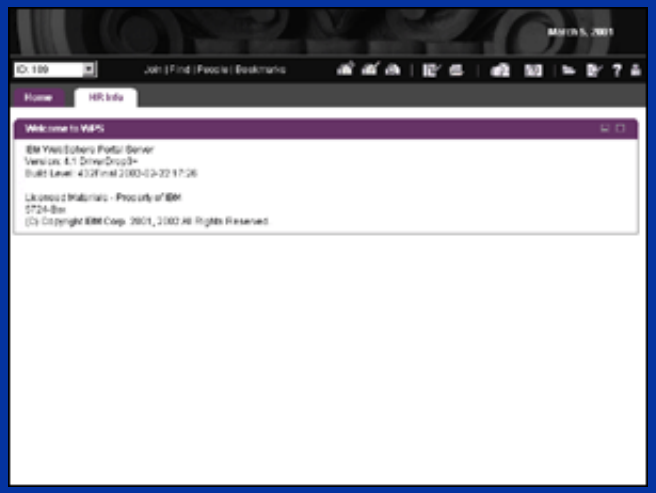
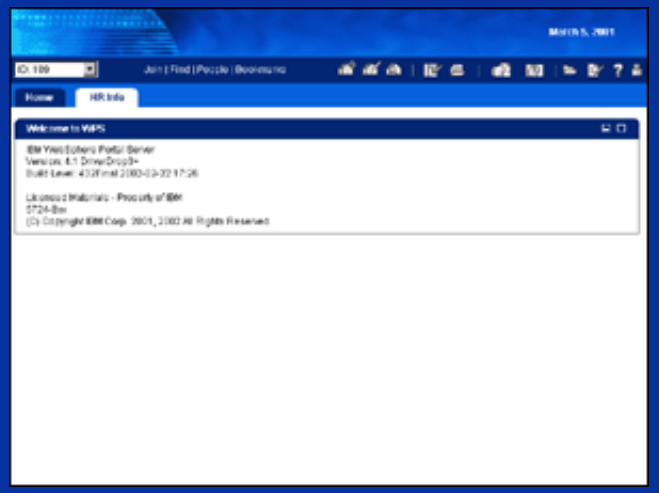
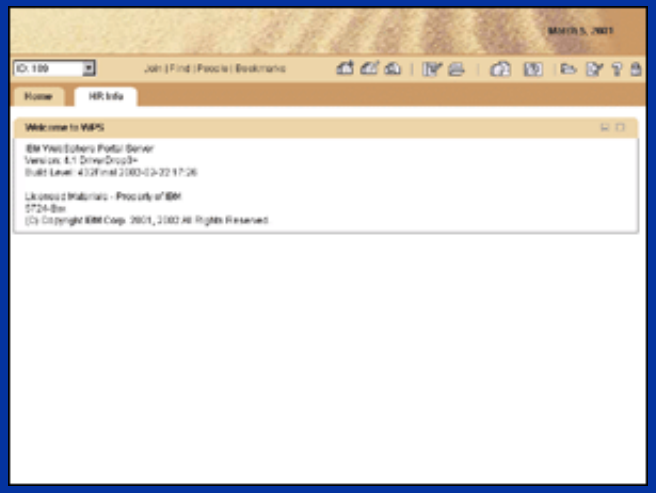
Theme Examples



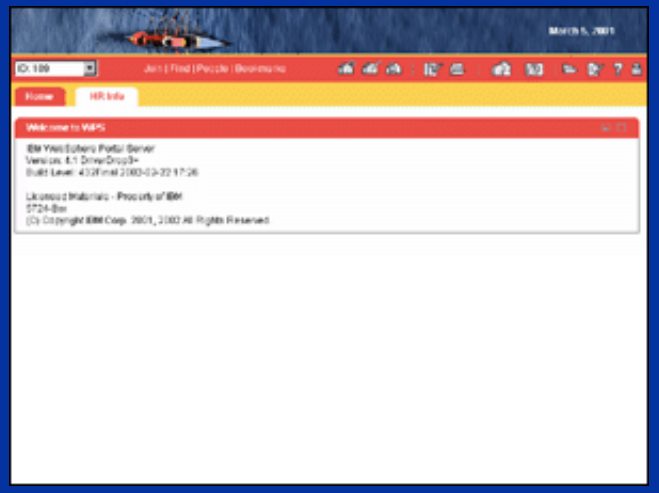
Architecture



Blue Wave



Dunes



Sport

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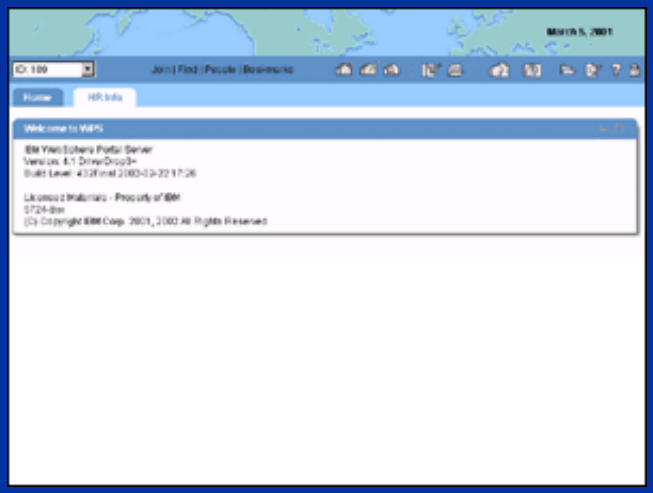
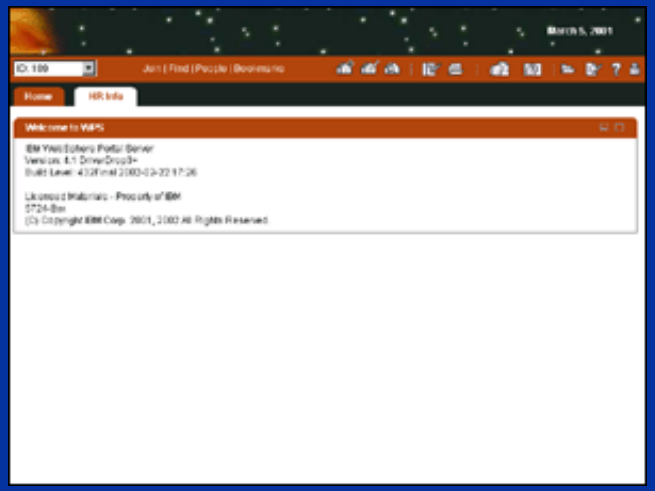
Theme Examples

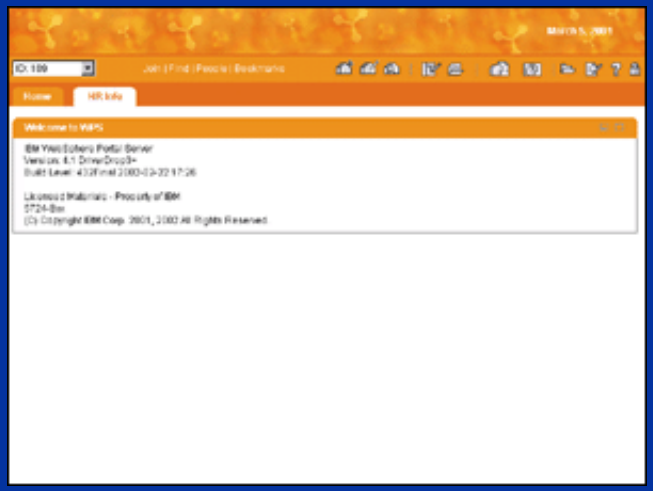
Telecom



World



Space



Molecules

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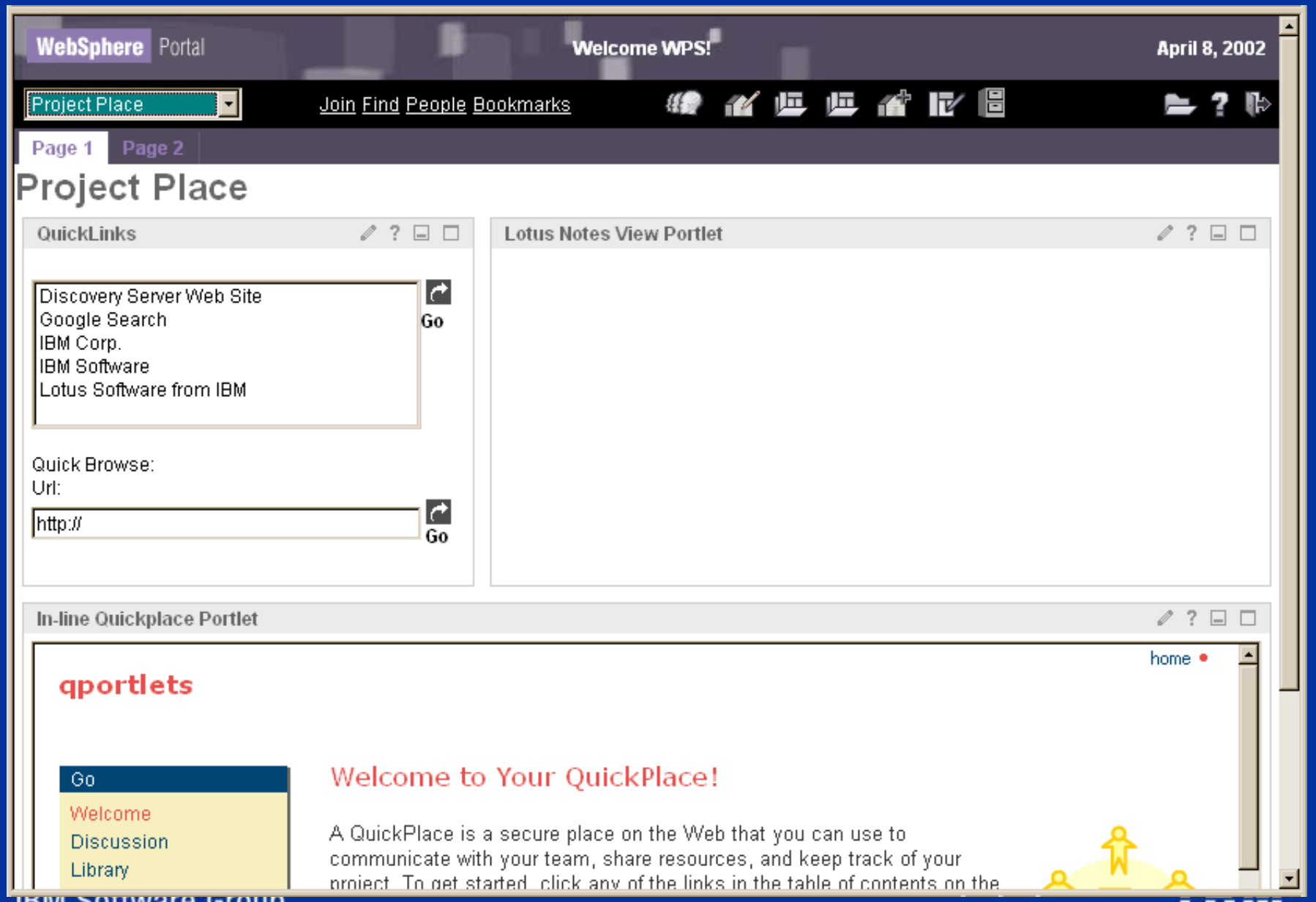
A Collaborative Place



Portal Administration - Places

- Place Management
- Place Permissions
- Place Default Settings
- Member Management
- Everything else is the same as Enable Administration

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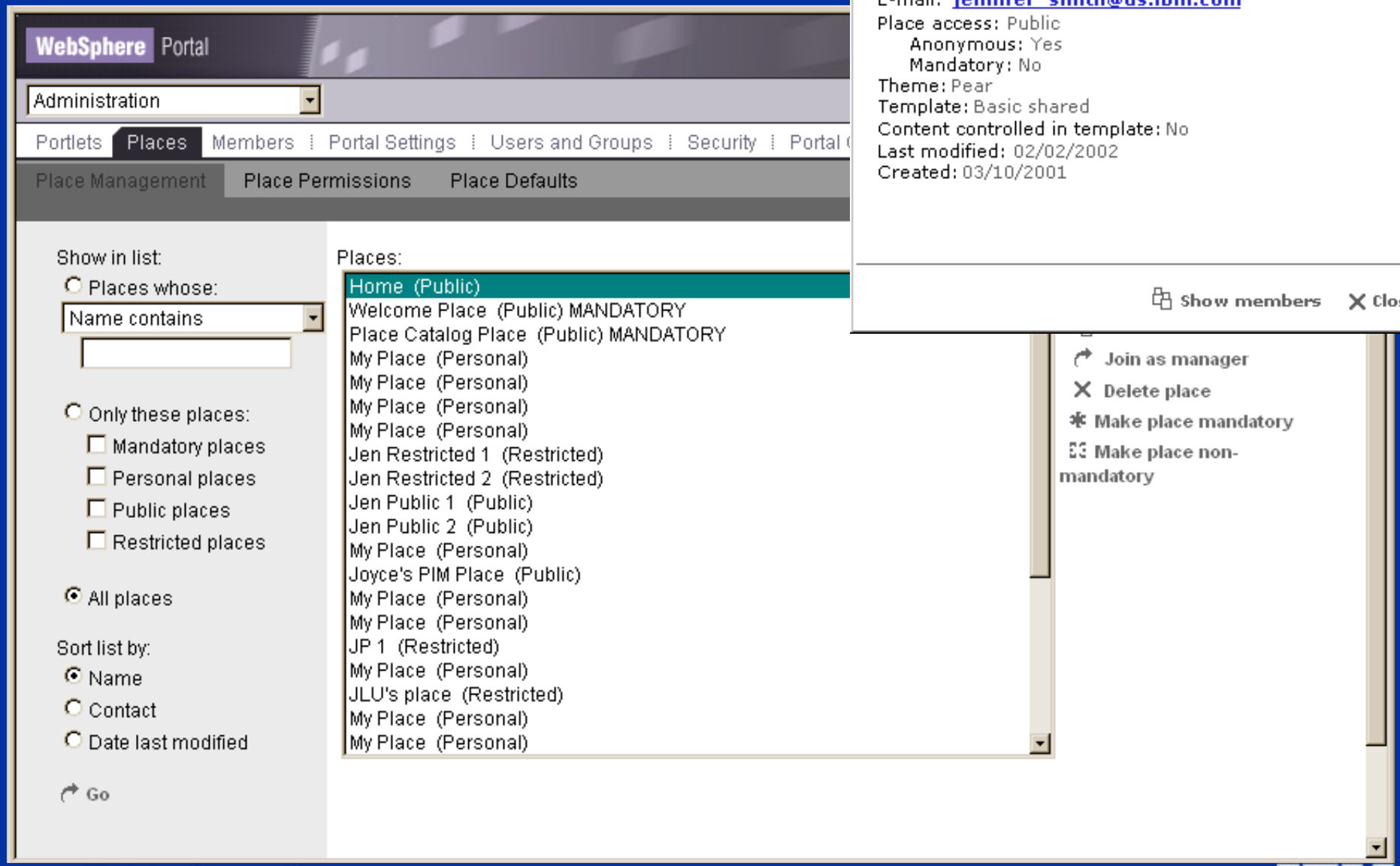
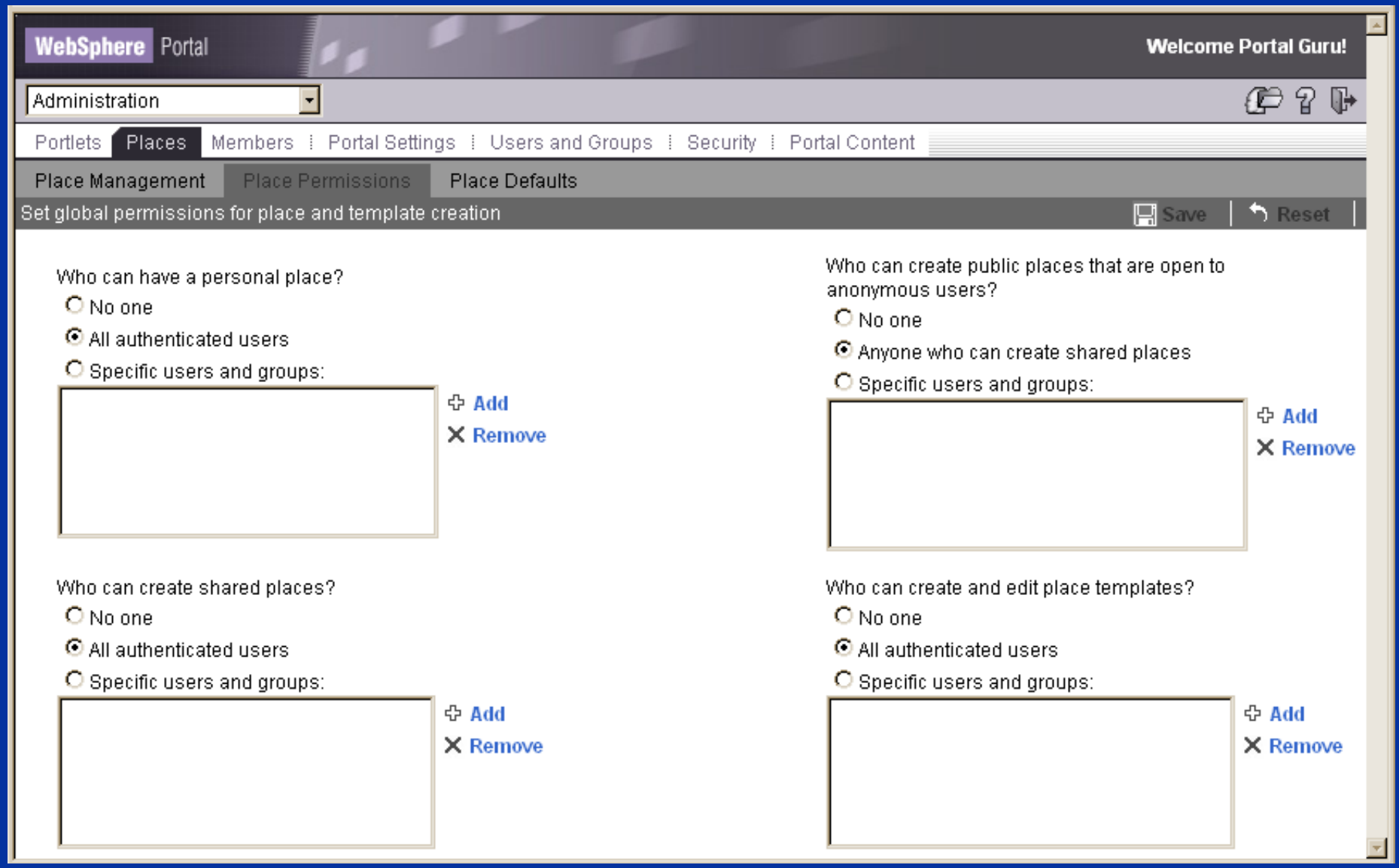
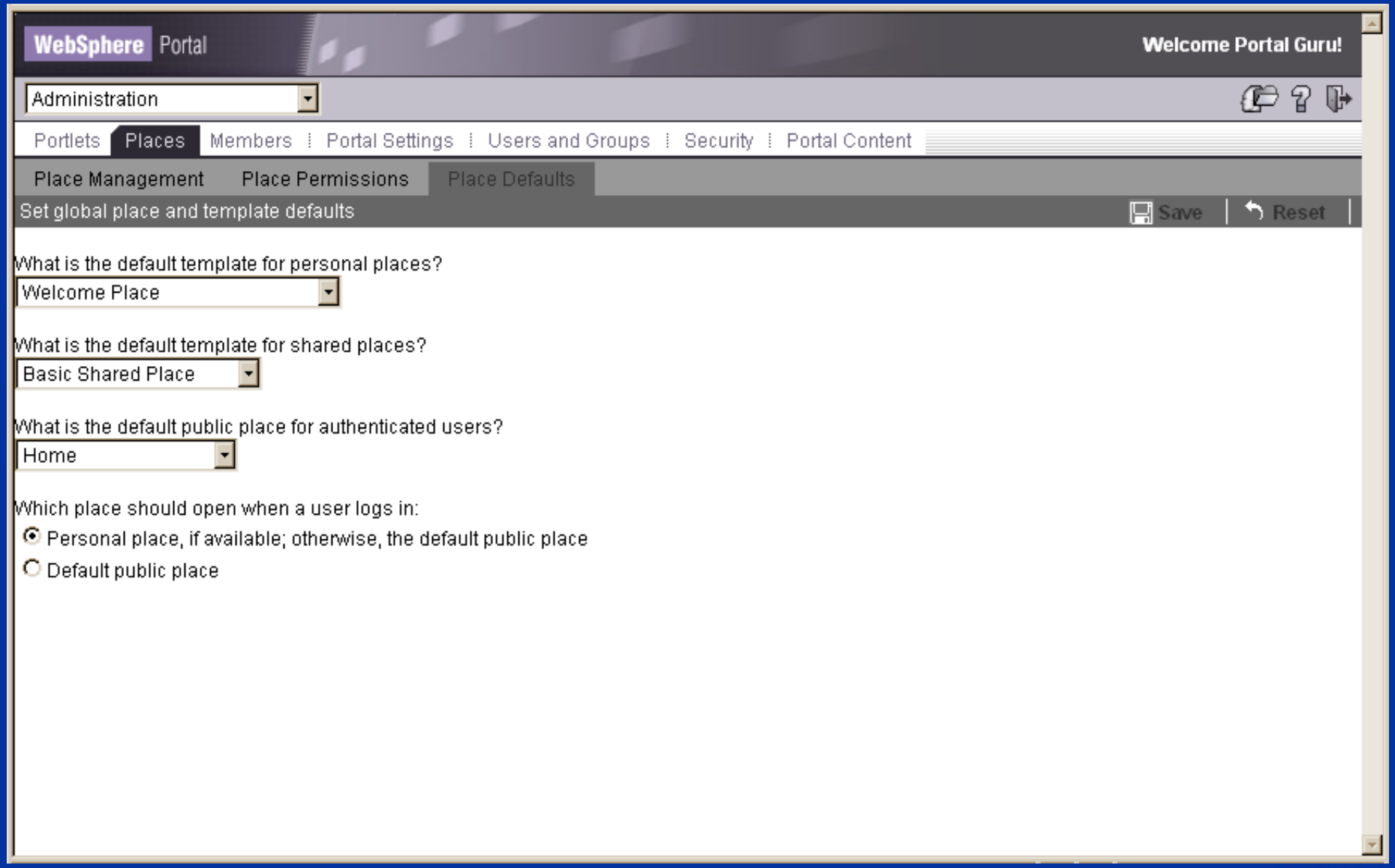
Administration - Places - Managem



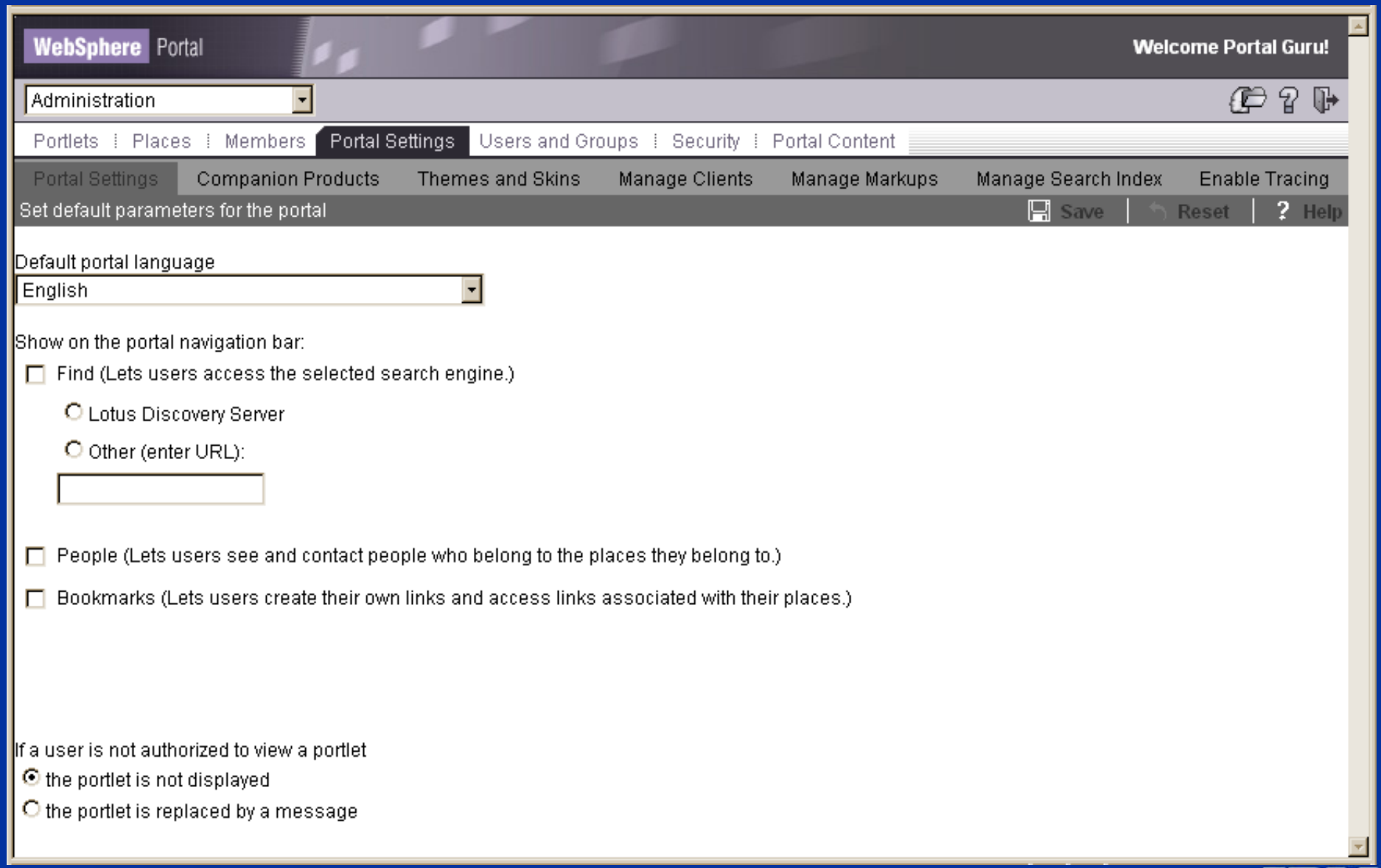
Administration - Places - Permissions



Administration - Places - Defaults



Administration - Portal Settings for Extend



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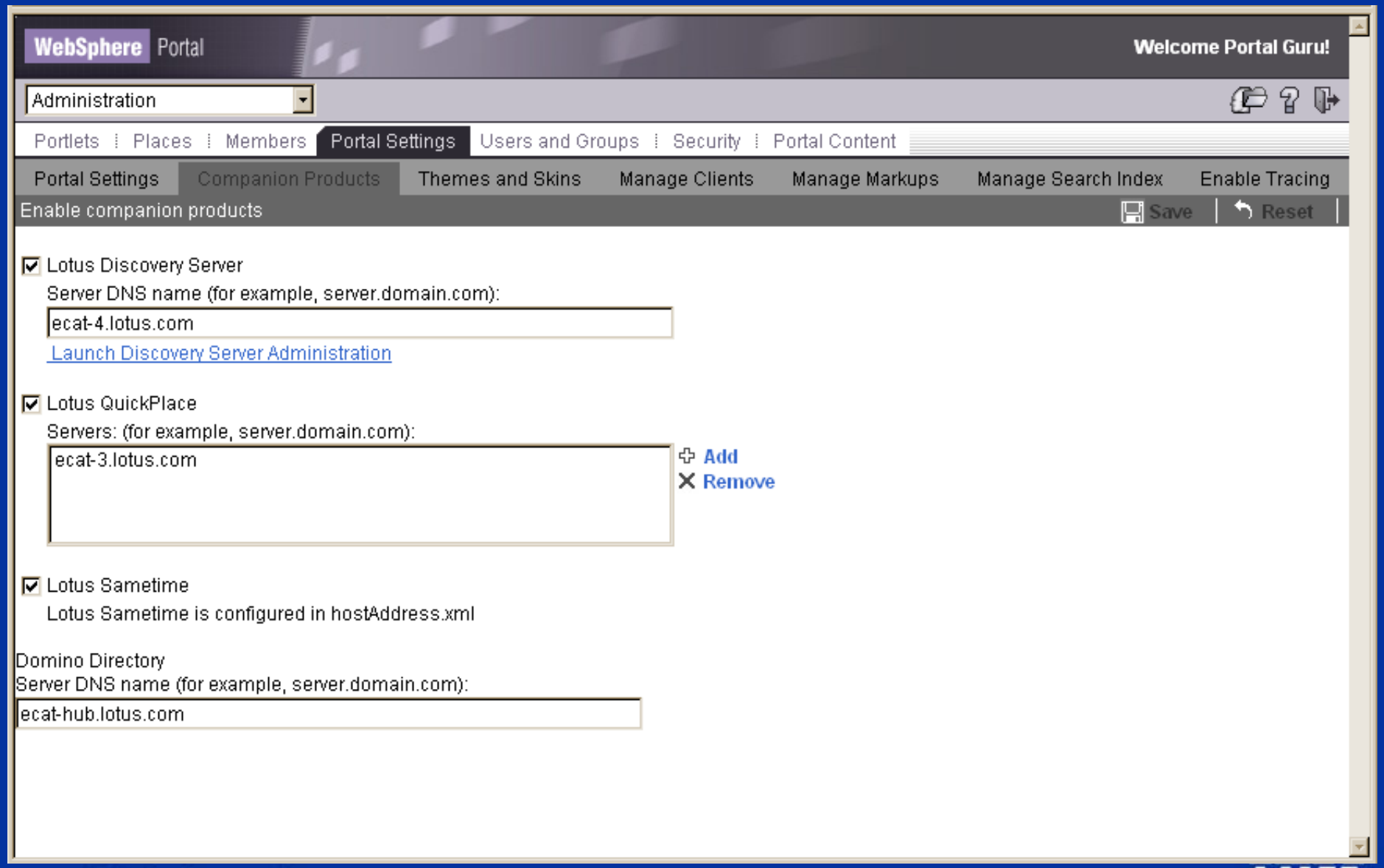
Administration - Portal Settings for Extend Companion Products



Additional Collaboration Products in WebSphere Portal Extend

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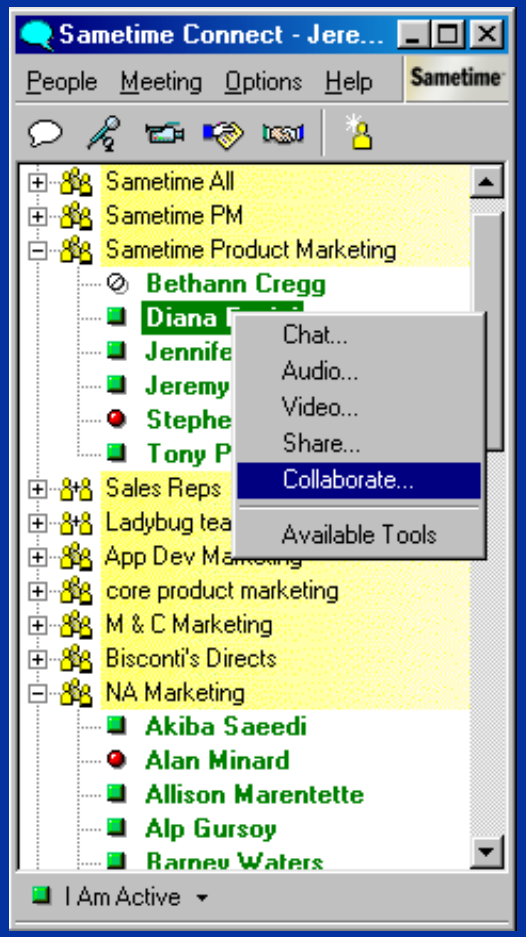
Lotus Sametime 2.5 Included in Extend/Experience

- "Real-time Collaboration that's fit for business"
- Instant Messaging
- Online Awareness
- e-Meetings
- Application Sharing
- Whiteboarding
- Audio/Video
- Secure
  - ►Encrypted
  - ►Uses corporate directory for names
- API Toolkits for custom applications, logging



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Sametime System Requirements

- Servers:
  - Windows NT, 2000
  - iSeries
  - AIX, Solaris, zOS coming in ST 2.6
- Clients:
  - Windows native client
  - Java client
  - Awareness component works in Netscape and IE
- Directories:
  - Domino
  - LDAP
- More information: www.lotus.com/sametime

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Sametime Use at IBM

"We went from no users to over a quarter of a million users ... on word of mouth alone. It's become a way of life - if we turned it off, I think we'd have a mutiny." *John Parick, IBM Vice President, Internet Technologies, PCWorld Magazine, 8/2001*

The numbers for June, 2001:

- 86,168 "person-hours" of e-meetings
- 4,745 total meetings (avg. 160 per day)
- 22 meetings with > 75 attendees

If 10% of those meetings would have required travel, IBM saved $1.9M in June alone just in reduced T&E expense .. with three Win32 servers for all of this!

Assuming avg meeting had 5 participants, travel cost each employee $800

Sametime Meeting Room - Portal Server overview by Carol Jones - Microsoft Internet Explorer

Meeting Edit View Tools Help

Screen Sharing | Whiteboard

Stop Sharing | Allow Control

WebSphere software

IBM.

Personalizing Portlets

Users edit portlet settings

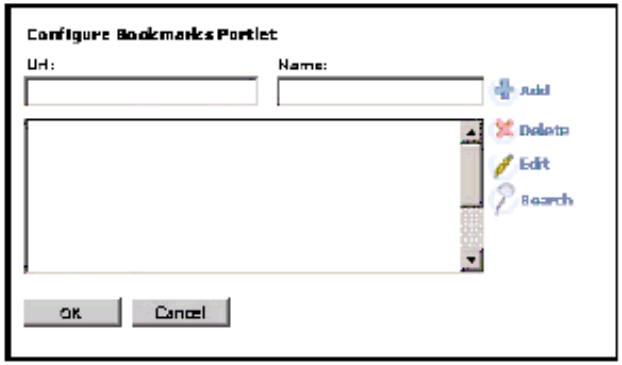
- e.g. set up bookmarks

Administrators configure portlets

- e.g. define global settings for all users

Advanced personalization

- portlets can display targeted content using business rules



16 of 50 11 x 8.5 in

Name

Chris Crummey/CAM/Lotus
Daniel D Gagne/CanEast/IBM
Daniel F Ortiz/Jacksonville/IBM
David King/Grand Rapids/IBM
Dean Phillips/Southfield/IBM
Diane Ross/CAM/Lotus
Don Carr/Raleigh/IBM
Edward Duhe/Dallas/IBM
Graham Harper/UK/IBM
Ivan Portilla/Boulder/IBM
Jack Welch/CAM/Lotus
Jeanette Coury/WAS/Lotus
Jeff Rodriguez/San Jose/IBM
Jennifer Koehl/WAS/Lotus
Jim Cavalier/CAM/Lotus
Jim McKeon/CAM/Lotus
Joe Baxter/ATL/Lotus
Joel Sundman/Rochester/IBM
Kyle C Miller/Raleigh/IBM
Lars-Olof Allerhed/Sweden/IBM
Lincoln Roach/Somers/IBM
Marcelo Gardelin/Argentina/IBM
Mark Giles/Austin/IBM
Mark Sherman/Pittsburgh/IBM
Matt Hodulik/DET/Lotus
Matt O'Neil/Chicago/IBM
Matthew G Kelm/Rochester/IBM
Melissa Partington/ATL/Lotus
Michael Locker/San Francisco/..
Michele Franklin/CAM/Lotus
Morgan M Wright/White Plains/..
Paul Kanzer/Rolling Meadows/I..
Peter Herman/Endicott/IBM
Philip Monson/CAM/Lotus
Prady Mahale/Austin/IBM
Ric Topp/Providence/IBM

You have no permissions

Carol Jones/Raleigh.. that's ok, i'll keep it clean :-)
Lars-Olof Allerhed/S.. does any one have the url to the PDF file on the intranet...???
Daniel F Ortiz/Jacks.. what is the url for the pdf
Adriana Robinson/C.. the pdf is posted in salestools
William Learned/DE.. http://w3.lotus.com/l_dir/Lotus%20Sales%20Tools%205.nsf/47ac045d8e5ae4be85256984006cf2d2/1a614bc48231978c85256b05006afe32?OpenDocument

Type your chat message here... Send

Catherine A Webb/Somers/IBM left the meeting.

56 Participants 01:31:20

Start 11:32 AM

Lotus QuickPlace 2.0.8 - Zero to Collaboration in 60 seconds

- Browser based
- Self Service
- Customizable
- Discussion Threads
- Shared Knowledge
- Document Library
- Lite Doc Mgmt.
- Calendar
- Tasks
- Workflow
- MS Office Publishing
- SMTP Mail
- E-Mail address
- Off–line support
- Drag & Drop
- Forms creation
- HTML Importing
- Place Types
- Etc…

Tons of features! Included in WP Extend and Experience

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QuickPlace 2.0.8 System Requirements

- Must install on top of Domino 5.0.8 and specify an external directory
- Server Platforms
  - Windows, AIX, Solaris, iSeries, zSeries
- Client
  - MS IE 4+, Netscape 4.7+
- More information: www.lotus.com/quickplace

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GE - Sametime & QP Explosive growth

"…we are becoming a paperless organization …one that uses Sametime or QuickPlace instead of employee travel, e-Learning instead of costly classroom training …one centered around our customers and their needs…"

ST Chat	ST Meeting	QP
43,128 ST Connect Logins	2118 Total Mtgs 419 Unique Mtgs	19,616 QPs 323,489 page views

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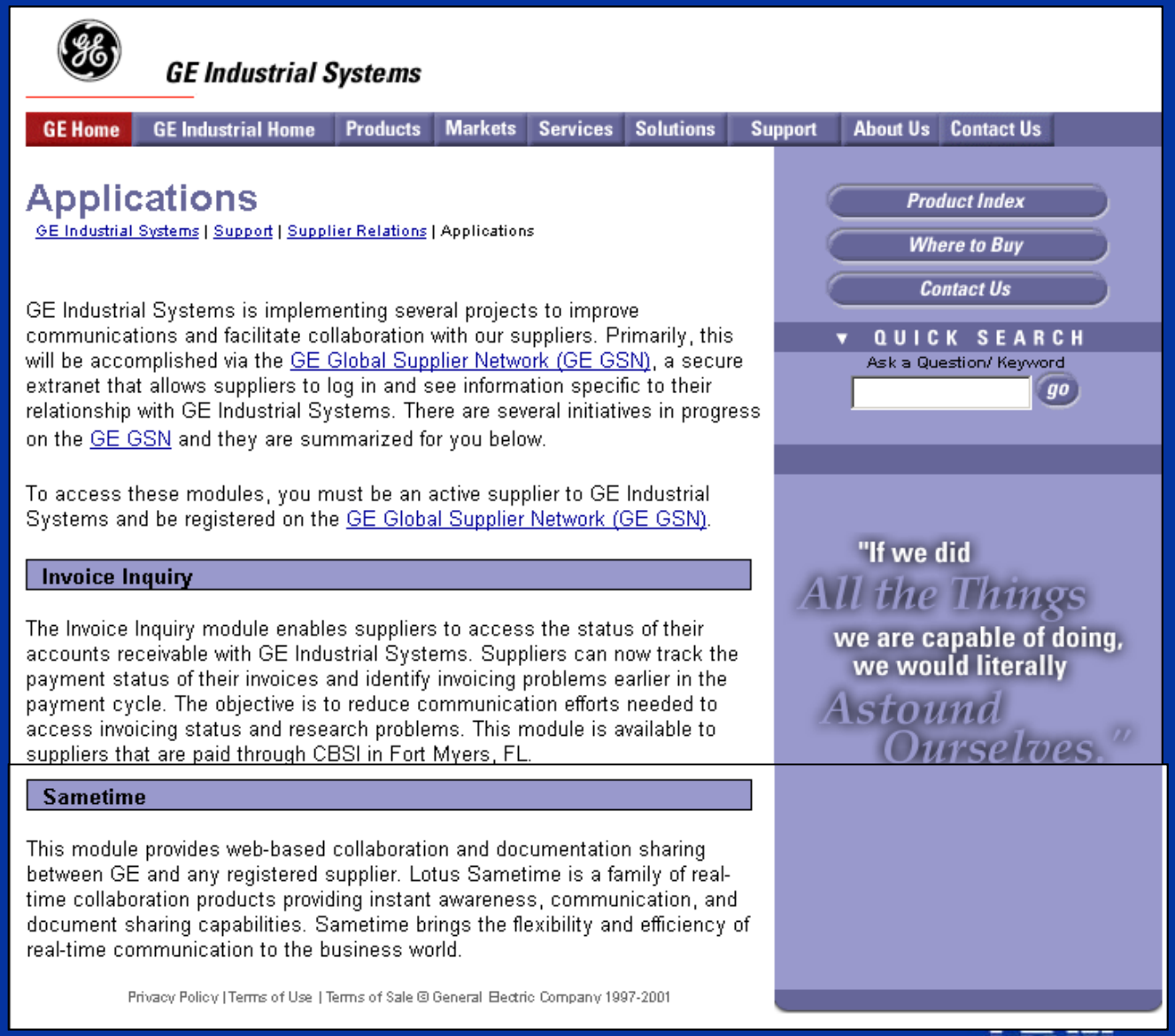
What GE has gained...Deeper, Collaborative Culture

What has this done for GE?

- Broader & richer communication
- Faster decision making
- Better information & document sharing
- Standardized global collaboration infrastructure
- Mission critical-type user expectations



GE Industrial Systems

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Applications

GE Industrial Systems | Support | Supplier Relations | Applications

GE Industrial Systems is implementing several projects to improve communications and facilitate collaboration with our suppliers. Primarily, this will be accomplished via the GE Global Supplier Network (GE GSN), a secure extranet that allows suppliers to log in and see information specific to their relationship with GE Industrial Systems. There are several initiatives in progress on the GE GSN and they are summarized for you below.

To access these modules, you must be an active supplier to GE Industrial Systems and be registered on the GE Global Supplier Network (GE GSN).

Invoice Inquiry

The Invoice Inquiry module enables suppliers to access the status of their accounts receivable with GE Industrial Systems. Suppliers can now track the payment status of their invoices and identify invoicing problems earlier in the payment cycle. The objective is to reduce communication efforts needed to access invoicing status and research problems. This module is available to suppliers that are paid through CBSI in Fort Myers, FL.

Sametime

This module provides web-based collaboration and documentation sharing between GE and any registered supplier. Lotus Sametime is a family of real-time collaboration products providing instant awareness, communication, and document sharing capabilities. Sametime brings the flexibility and efficiency of real-time communication to the business world.

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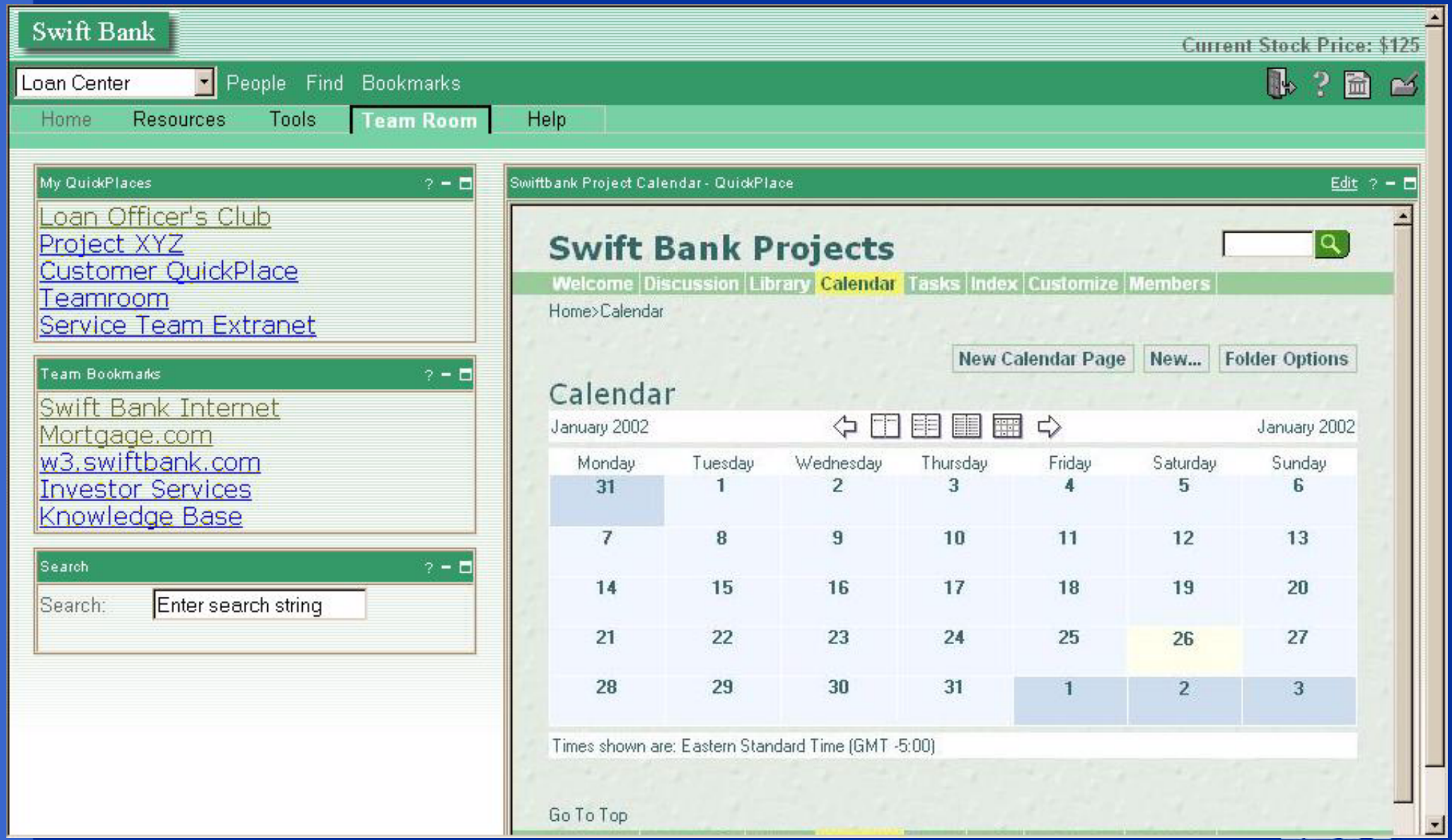
QUICK SEARCH

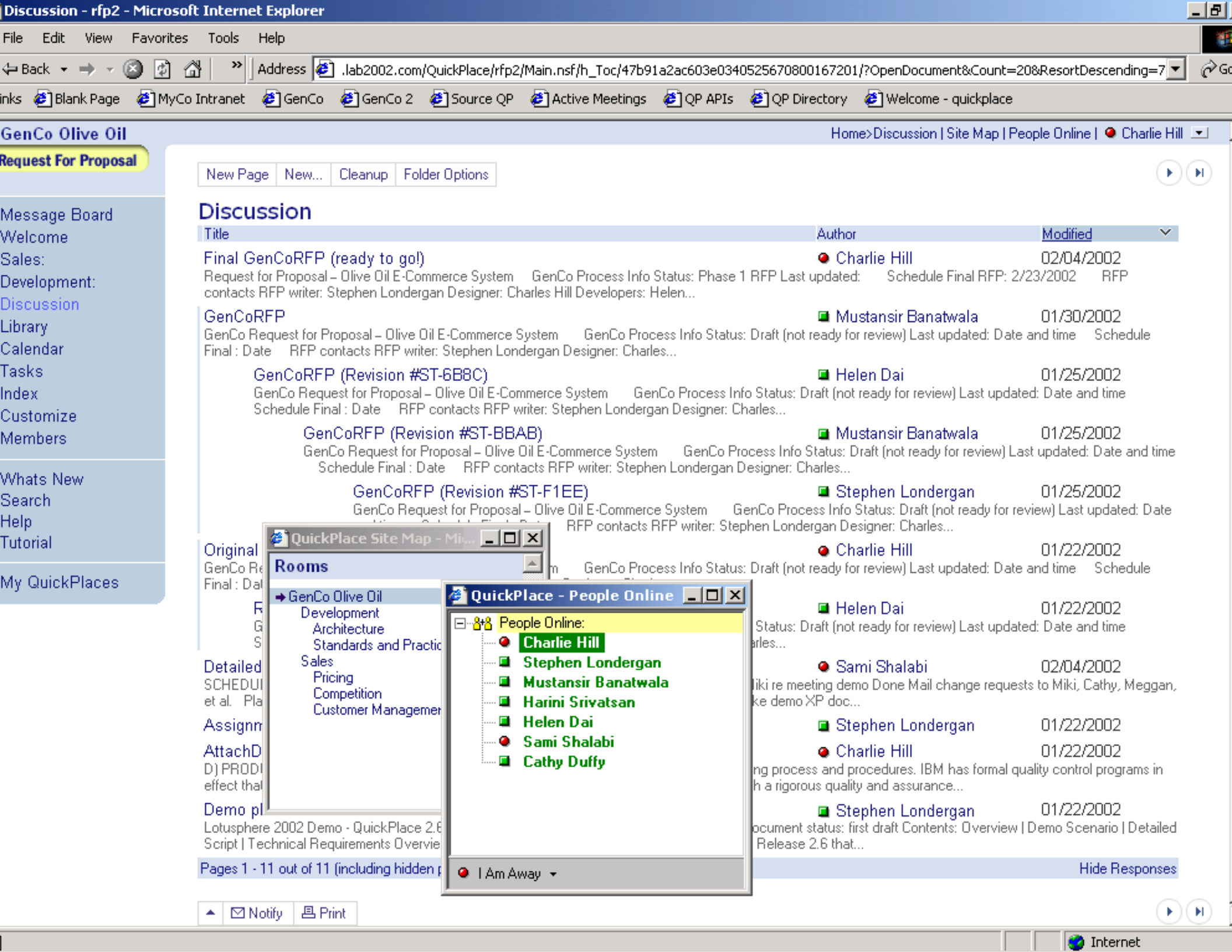
Ask a Question/ Keyword

go

"If we did All the Things we are capable of doing, we would literally Astound Ourselves."

QuickPlace Embedded in the Portal




Discussion - rfp2 - Microsoft Internet Explorer
File Edit View Favorites Tools Help
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Calendar
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Customize
Members
Whats New
Search
Help
Tutorial
My QuickPlaces
New Page New... Cleanup Folder Options
Discussion
Title Author Modified
Final GenCoRFP (ready to go!) Charlie Hill 02/04/2002
Request for Proposal – Olive Oil E-Commerce System GenCo Process Info Status: Phase 1 RFP Last updated: Schedule Final RFP: 2/23/2002 RFP contacts RFP writer: Stephen Londergan Designer: Charles Hill Developers: Helen...
GenCoRFP Mustansir Banatwala 01/30/2002
GenCo Request for Proposal – Olive Oil E-Commerce System GenCo Process Info Status: Draft (not ready for review) Last updated: Date and time Schedule Final : Date RFP contacts RFP writer: Stephen Londergan Designer: Charles...
GenCoRFP (Revision #ST-6B8C) Helen Dai 01/25/2002
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GenCoRFP (Revision #ST-BBAB) Mustansir Banatwala 01/25/2002
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GenCoRFP (Revision #ST-F1EE) Stephen Londergan 01/25/2002
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Original Charlie Hill 01/22/2002
GenCo Process Info Status: Draft (not ready for review) Last updated: Date and time Schedule
Helen Dai 01/22/2002
Status: Draft (not ready for review) Last updated: Date and time
Detailed Sami Shalabi 02/04/2002
Stephen Londergan 01/22/2002
Charlie Hill 01/22/2002
Demo pl Stephen Londergan 01/22/2002
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QuickPlace Site Map - Mi...
Rooms
GenCo Olive Oil
Development
Architecture
Standards and Practic
Sales
Pricing
Competition
Customer Managemer
QuickPlace - People Online
People Online:
Charlie Hill
Stephen Londergan
Mustansir Banatwala
Harini Srivatsan
Helen Dai
Sami Shalabi
Cathy Duffy
I Am Away
Internet

Lotus Discovery Server - What is it?

- Identifies experts based on their activity, interests
- Analyzes and categorizes documents
- Builds taxonomies
- Search and browse
- Employee profiles
- Find all documents by an author
- Integrated into places
- Categorizes a WebSphere Portal Place into the K-map taxonomy

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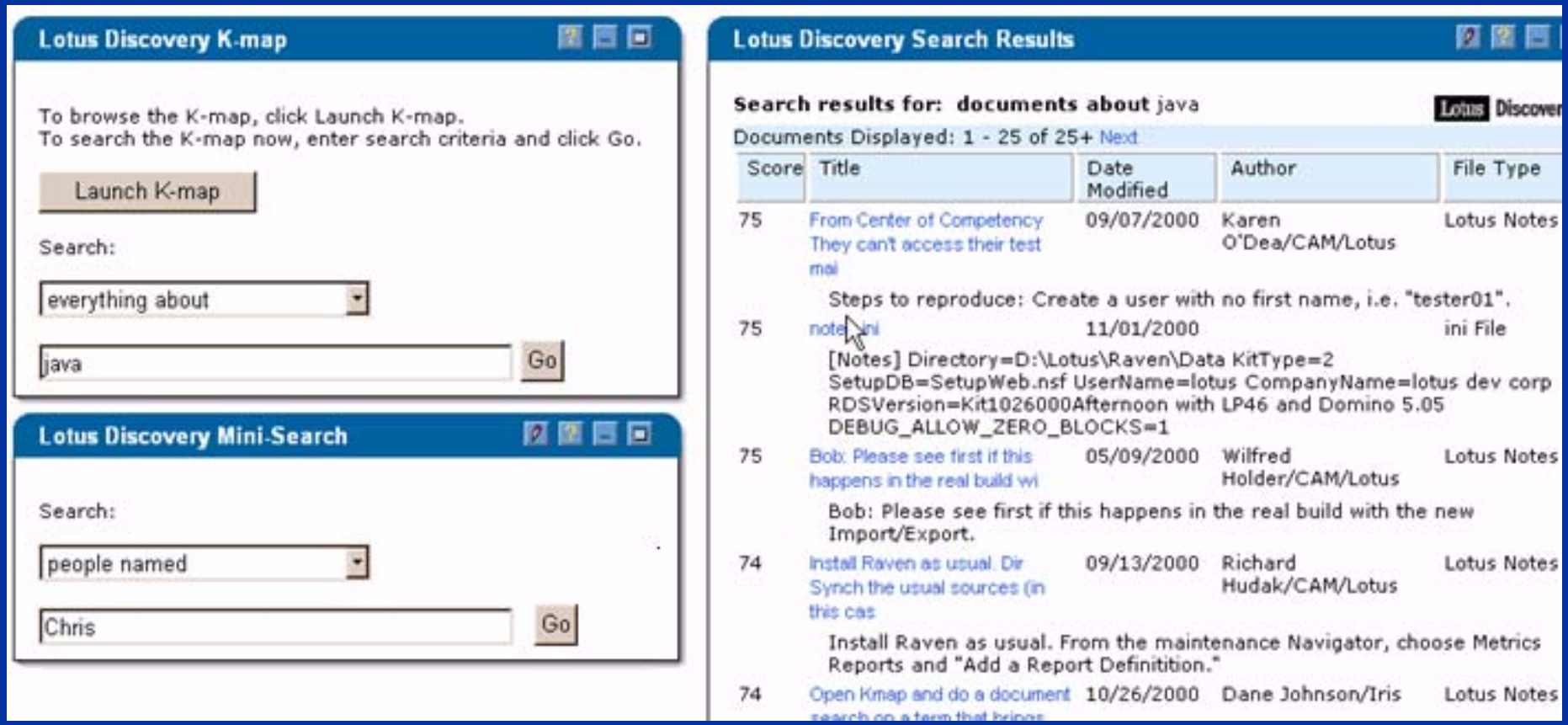
Lotus Discovery Server Integration

- Find button launches K-map
- Portlets
- Register Places for spidering (future)



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Page Groups and Places

Page Groups	Collaborative Places
Group of Pages w/ portlets Navigation UI	Group of Pages w/ portlets Navigation UI
Manage sets of pages as a single unit	Manage sets of pages as a single unit
Access Control via ACL Portlet	Access Control via Place Membership Roles
Can be shared by group of users	Can be shared by group of users
Admins can create places	End users may create new places
	Place Templates
5 Page Group themes	+30 Place Themes
	Instantiate applications
	Place-based online awareness
	Embedded awareness components

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Summary and Questions

- Portals are made to share information
- Places bring collaboration to the portal family
- Sametime and QuickPlace provide added capabilities
- Visit the portal web site:
  - http://www.ibm.com/websphere/portalfamily

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