

IBM Software Group



Collaborative Places for WebSphere Portal v4.1

May 2002

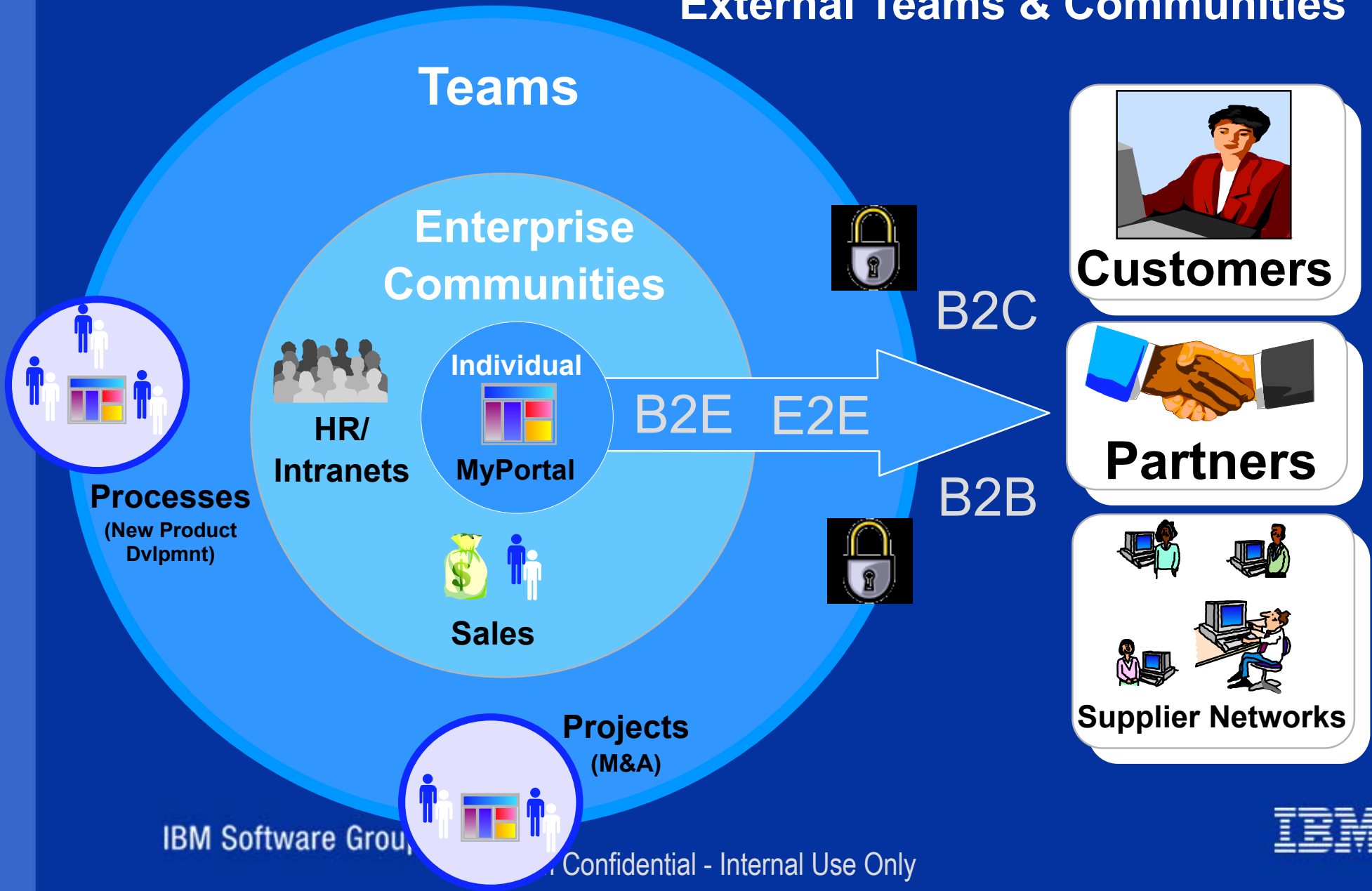
Agenda

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

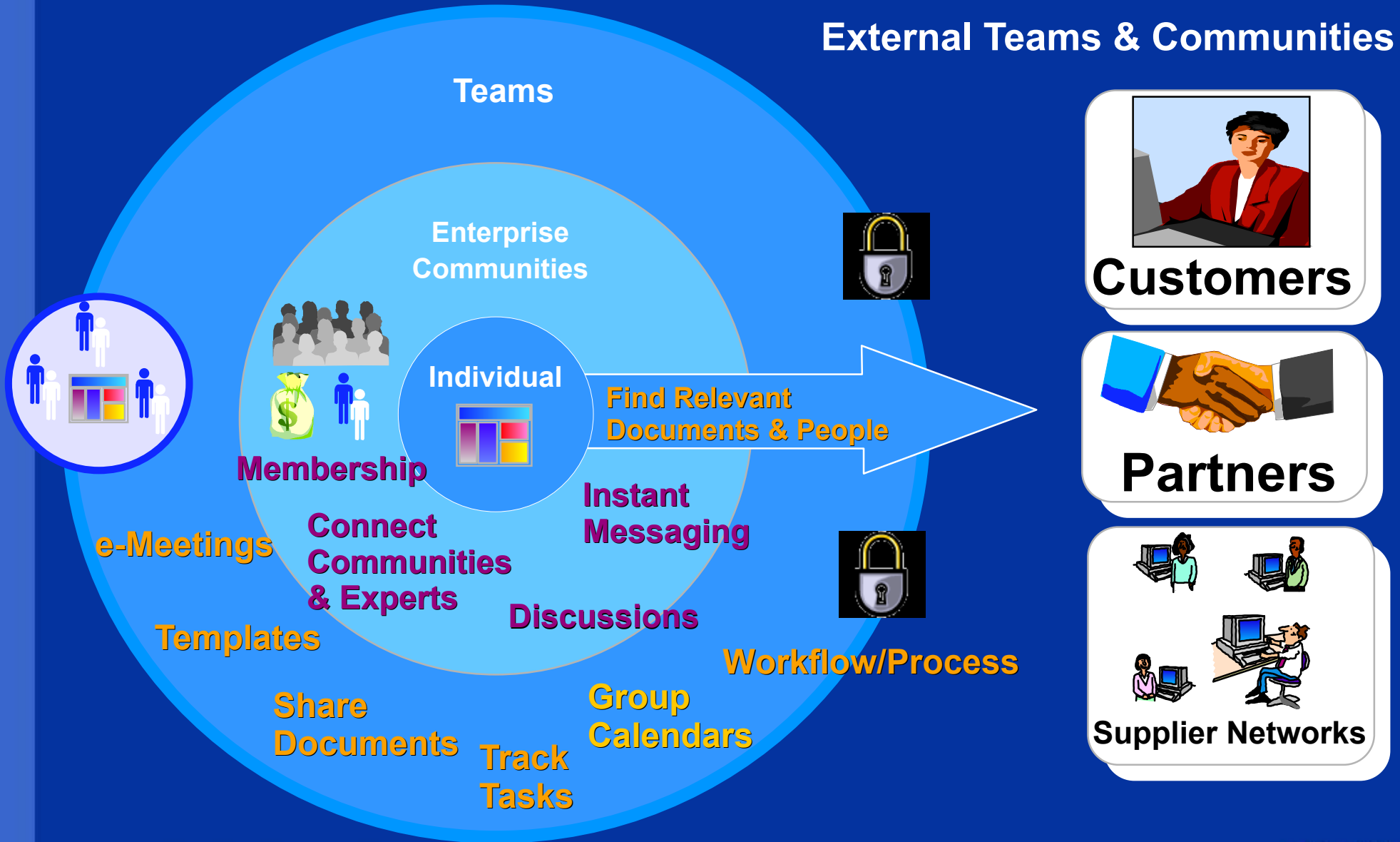
Note: Any and all screen shots
subject to change in the final product!

Portal Implementation Progression

External Teams & Communities



Where Does Collaboration Fit?



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

Portal Collaboration - Breaking It Down

IBM
Differentiator
Today

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

The Future of Portal Collaboration

Generation 3:

Next Gen Contextual Collaboration

Generation 3: Ubiquity

- + Plug and play components/web services
- + Workflow and process integration
- + Seamless Knowledge Management

Value: Ease of development and deployment across portals for targeted end user functionality

Generation 2: Action

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

Generation 1: Access

Value: Single interface to access all resources

Lotus/IBM

Most vendors

IBM Software Group

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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

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

My Place Example Screen Shot

Swift Bank
Current Stock Price: \$125

My Place People Find Bookmarks

Home
My Work
My Tools
Resources
Help

Account Balance Edit ? -

Account Balances:
1234-5678-9012

Savings	\$10,000	
Checking	\$2,000	
Money Market	\$4,000	

My Notes Mail Edit ? -

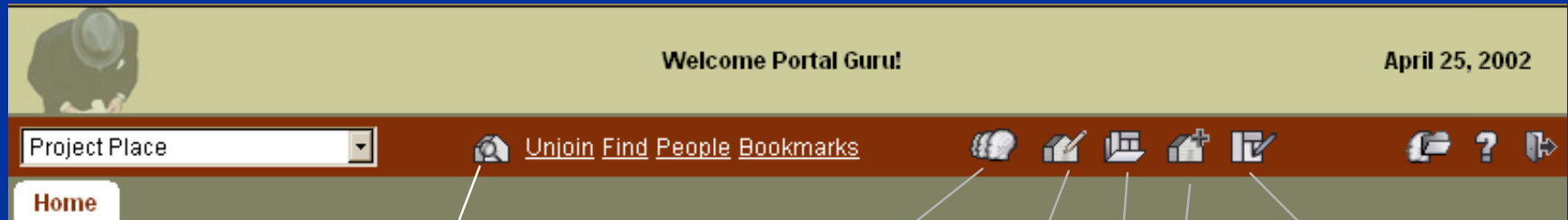
Subject	Who	Date
▼ Don't forget to sign up for service online!	● Mary Bankston /SwiftBank	01/28/02
▼ Finance training update... please read	○ Lisa Burns/SwiftBank	01/27/02
▼ Competitive News Summary	○ Joe Smith/SwiftBank	01/27/02
Open	● Bob Bry/SwiftBank	01/27/02
Edit	● Rich Bogart/SwiftBank	01/26/02
Reply	○ Kathy Humphrey/SwiftBank	01/26/02
Reply with History	○ Elena George/SwiftBank	01/25/02
Reply To All	○ Administrator/SwiftBank	01/24/02
Reply To All with History	● Steve Swft/SwiftBank	01/23/02
Forward		
Delete		

Account Activity Edit ? -

Account Activity:
1234-5678-9012

Transfer to	\$300	20 Jan	
Checking		2002	
Check #	\$45.50	18 Jan	
1829		2002	
ATM	\$100	18 Jan	
Withdrawal		2002	
Check #	\$23.45	15 Jan	
1828		2002	

Action Bar in WP Extend



Place Information

Manage Membership

Edit Place

Save as Template

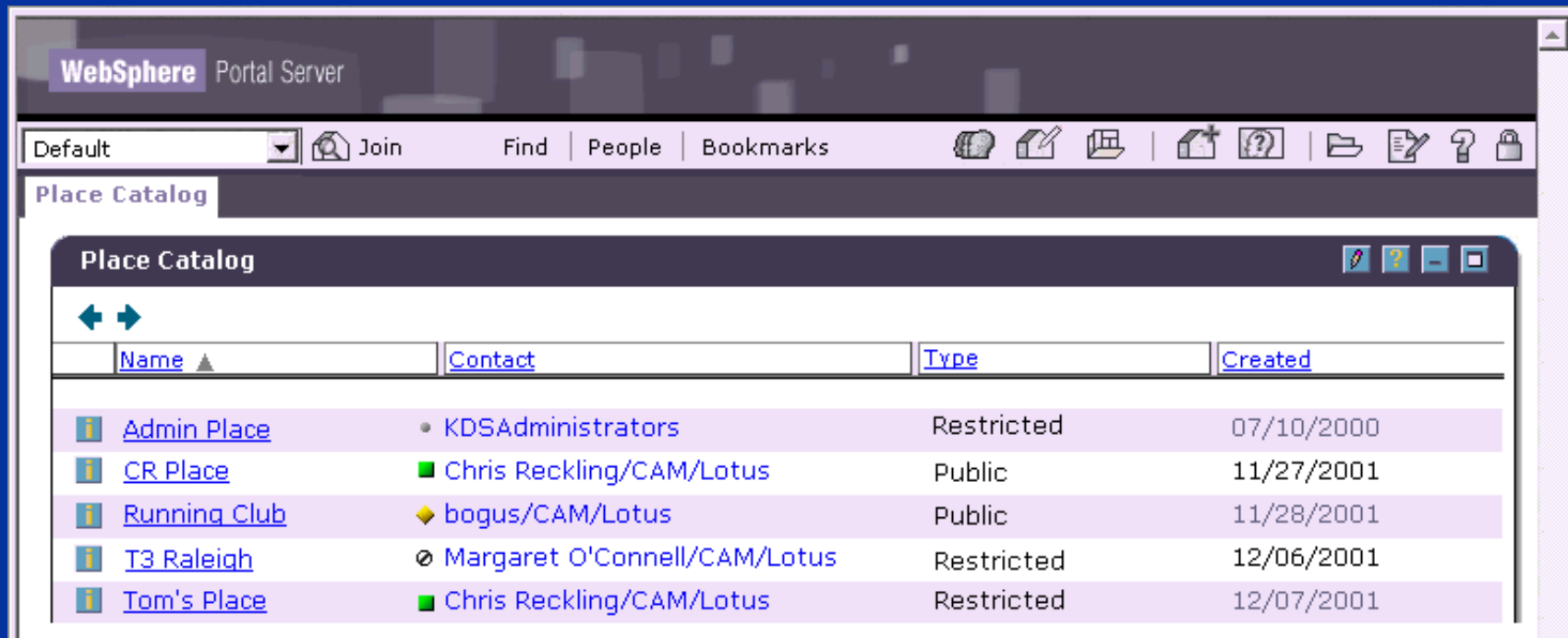
Create Place

Manage Templates

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

Place Catalog



The screenshot shows a WebSphere Portal Server interface. At the top, there is a navigation bar with a "Default" dropdown menu, a "Join" button, and links for "Find", "People", and "Bookmarks". Below this is a "Place Catalog" tab. The main content area displays a "Place Catalog" window with a table listing various places. The table has four columns: "Name", "Contact", "Type", and "Created".

Name	Contact	Type	Created
Admin Place	• KDSAdministrators	Restricted	07/10/2000
CR Place	■ Chris Reckling/CAM/Lotus	Public	11/27/2001
Running Club	◆ bogus/CAM/Lotus	Public	11/28/2001
T3 Raleigh	⊗ Margaret O'Connell/CAM/Lotus	Restricted	12/06/2001
Tom's Place	■ Chris Reckling/CAM/Lotus	Restricted	12/07/2001

Creating a New Place

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

Create Place Screen

The screenshot shows the 'Create new place' dialog box within the WebSphere Portal interface. The dialog has a title bar 'Manage Places and Pages' and a subtitle 'Create new place'. It contains several input fields and options for configuring a new place.

WebSphere Portal Welcome Portal Guru!

Work With Places

Edit Layout and Content | **Manage Places and Pages** | Set Permissions | Choose Skins

Manage Places and Pages

Create new place ✓ OK | ↶ Cancel | ? Help

Place name:

Description:

Contact:

Theme:

Contact's e-mail address:

Theme preview:

Template:

Place access:

- Public - open to all registered portal users
 - Open to anonymous users
- Restricted - open to members only

Place Editing:

- Control content and layout in template

↶ Set locale-specific titles/descriptions

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

Adding Members

The screenshot shows the WebSphere Portal interface for managing a place. The main window is titled "WebSphere Portal" and "Work With Places". The current view is "Manage Places and Pages" for "Project Place". The place access is "Restricted - Open to members only". A list of members is shown, with "KSG Design (Group)" selected. An "Add User or Group" dialog box is open, showing a search for "rav" and a list of results including "Raven All,Cambridge,IBM (Group)".

WebSphere Portal

Work With Places

Edit Layout and Content | **Manage Places and Pages** | Set Permissions | Choose Skins

Manage Places and Pages

Manage membership for: Project Place

Place access: Restricted - Open to members only

Show: All members

- Chris Reckling
- Elena Karra
- Jennifer Smith
- KDSAdministrators (Group)
- KSG Design (Group)**
- KSG Dev (Group)
- wpsadmin

Add member

Remove member

Show ID

Restore member to role

Set page access

Role for selected person or group:

- Manager**
Managers can modify membership, layout, and bookmarks
- Designer**
Designers can modify layout and bookmarks
- Participant**
Participants can access and participate in the place

An asterisk (*) indicates that a member has specialized access to one or more pages. To restore a member's role-based access for all pages, click **Restore member to role**. To change a member's access to a specific page, click **Set page access**.

Add User or Group

Name is (or contains):
rav

Get users/groups

- Raven All,Cambridge,IBM (Group)**
- Mary Beth Raven,Iris
- Ravijit Paintal,IBM,US

+ Add X Close

Set Page Access

- Delegated page management within the place

RANDOM COMPANY X

Work with Places | Find | People | Bookmarks

Edit Layout and Content | **Manage Places and Pages** | Set Permissions | Choose Skins

Set page access for: NA Sales Place | Back | Save | Reset | Help

Place participants and designers:

- Blue Team
- Eastern Region
- Eastern Region Manager**
- Kathy Howard
- Western Region
- Western Region Manager

Show ID

Page: Eastern Market Factors

Restore page to role-based access

Clicking Restore page to role-based access gives all members (including you) access to the selected page at the level granted by their role.

Page access:

Set access to the specified page for the selected person or group.

- As dictated by place role
Sets access to that granted by the member's place role
- None
Member cannot view the page
- View
Member can view the page
- Manage**
Member can change page contents, layout, and access

Current place role for selected member: Participant

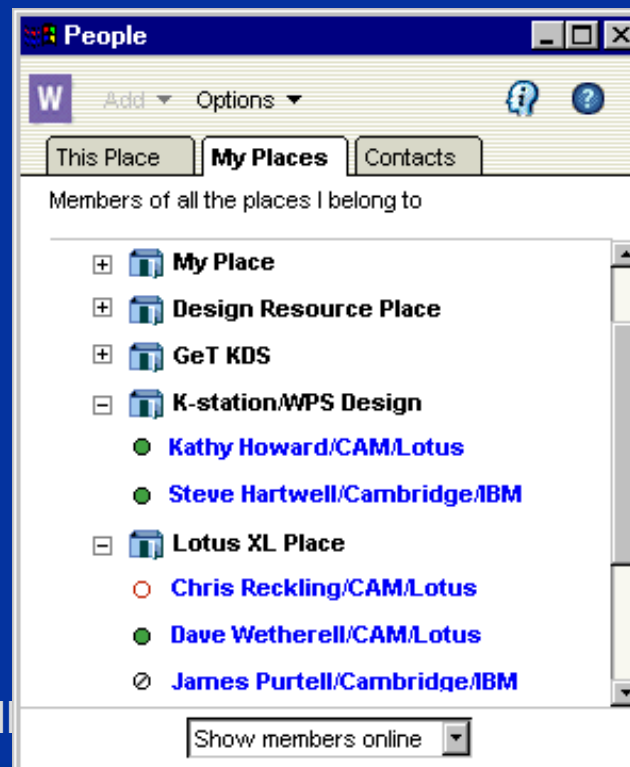
Place managers:

- Elena Karra
- Jennifer Smith

Done | Internet

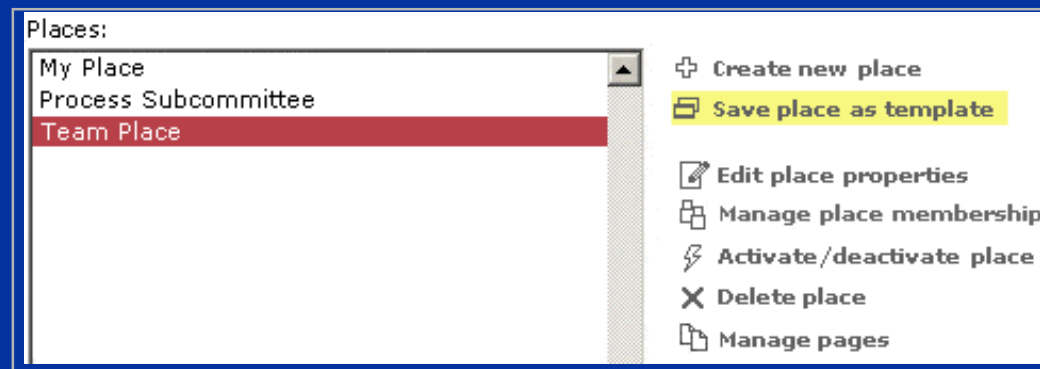
Integrated Online Awareness and Chat

- 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



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

The screenshot shows the 'Manage Place Templates' interface in a WebSphere Portal. The browser title is 'WebSphere Portal' and the user is logged in as 'Portal Guru!'. The breadcrumb trail is 'Work With Templates > Manage Templates > Edit Layout and Content > Choose skins'. The main content area is titled 'Manage Place Templates' and contains a list of templates and several action buttons.

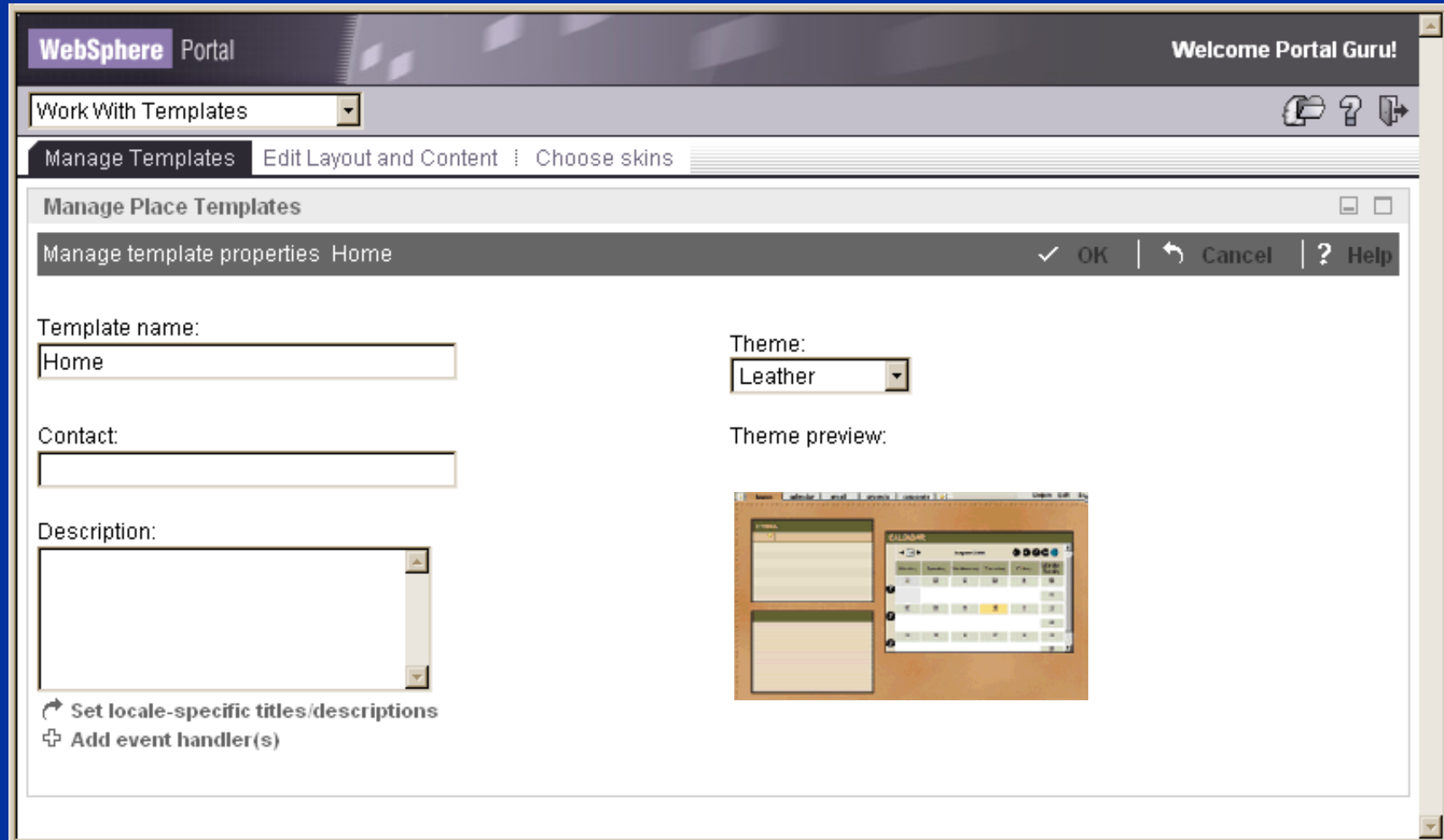
Place templates:

- Blank Place
- QuickPlace Place
- Place Catalog Template
- Basic Personal Place - Notes
- Basic Shared Place
- Basic Personal Place - Exchange
- Home
- Welcome Place
- Work With Places
- Work With Templates
- Administration

Actions:

- + Create new template
- Copy template
- Manage template properties
- X Delete template
- Manage pages

Template Properties or Create New Template



Types of Templates - Out of the Box

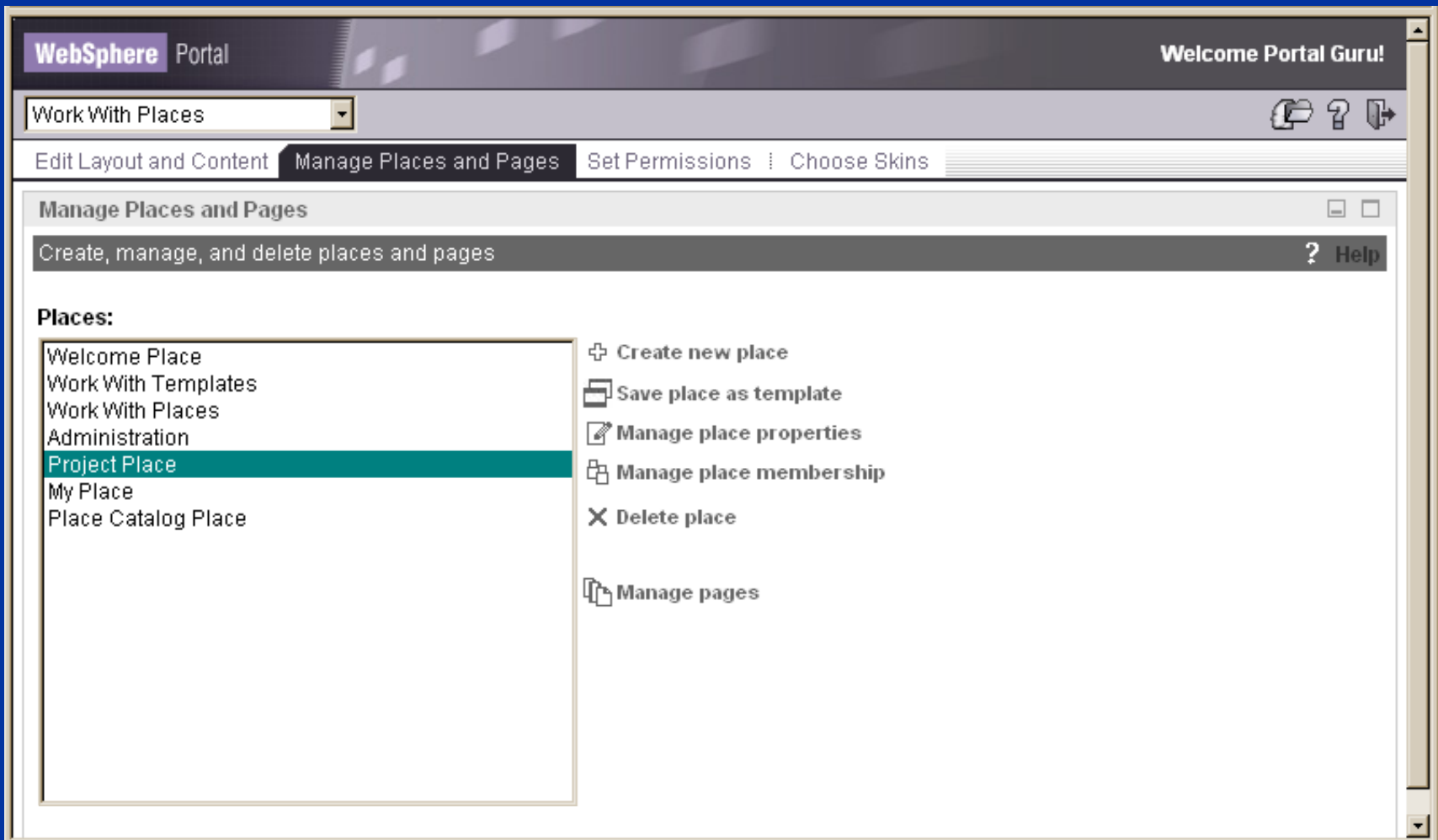
- Shared Place templates
 - ▶ Welcome
 - ▶ Basic
 - ▶ Blank
- Personal Place Template
 - ▶ Basic Personal Place - Lotus Notes
 - ▶ Basic Personal Place - Microsoft Exchange
- QuickPlace Template
 - ▶ creates a new QuickPlace teamroom for use in the portal
- Assign event handlers to the template
 - ▶ 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

Customization

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

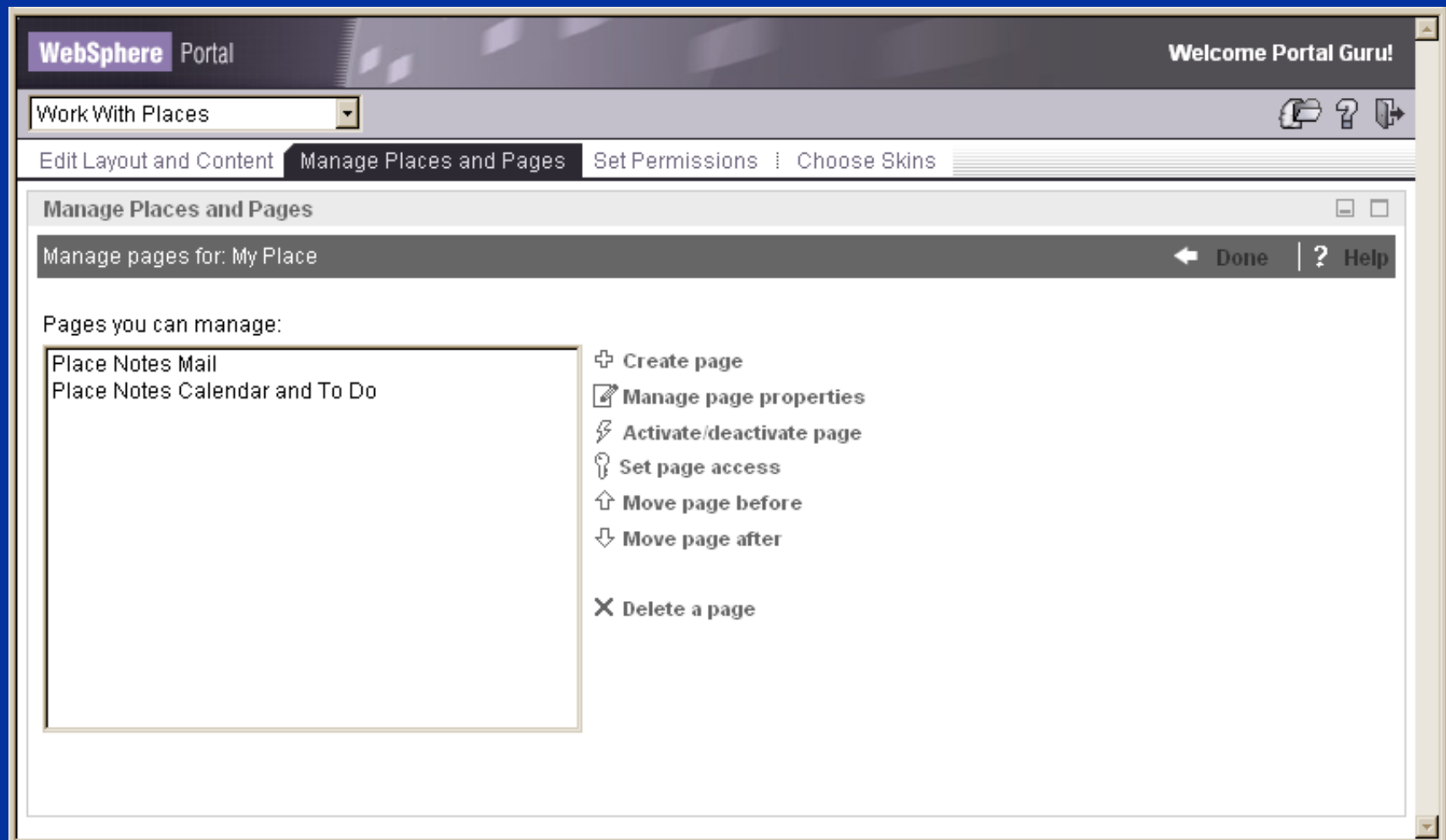
Working with Places

- Shows places you have access to manage or edit

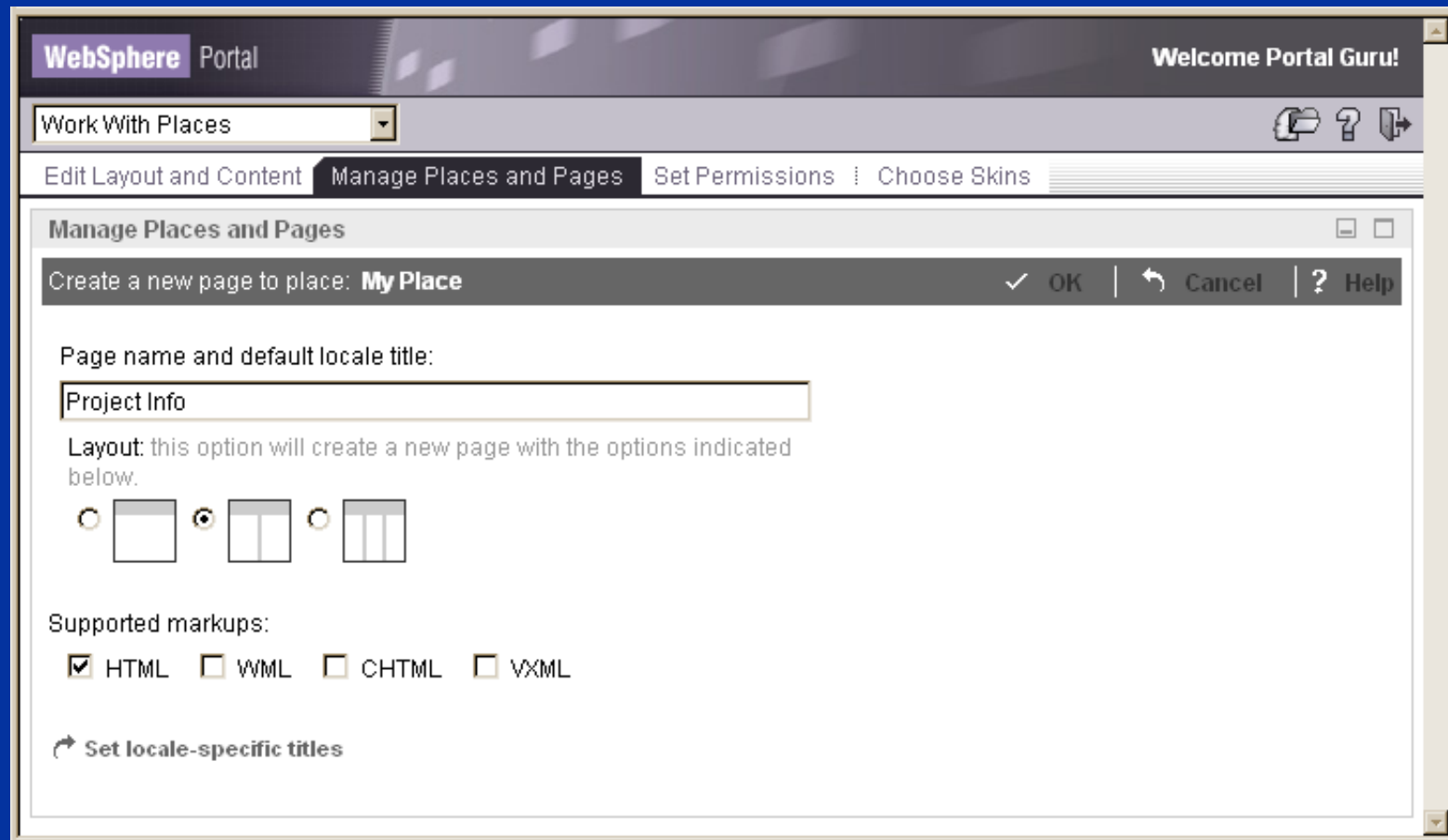


Manage Pages

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



Create New Page



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

Page Layout Controls

Place Edit Layout

Place: **Project Place** Page: **Page 1** This page supports: HTML | ? Help

This page has been deactivated. Please activate when you are done. [Activate](#)

Use the controls below to build the desired page layout. Fill the list to the right with portlets by getting portlets. To add a portlet to the page, select a portlet in the list and add it to the desired area.

NotesViewPortlet
Document Search
WebPagePortlet
QuickLinks
QuickPlacePortlet

[Get portlets](#)

You have manage access for this page; changes you make will affect all users of this page.

+ **← Add Column**

+ **← Add Row** ↔ (Not set)

+ **← Add Portlets** ↔ 100% **← Set Width**

Place Name Portlet

+ ↔ 300 **+** **←** **×** ↔ (Not set) **←** **×**

QuickLinks Lotus Notes View Portlet

+ **+** **×** **↑** **×**

In-line Quickplace Portlet

Get Portlets Window

- Search for portlets to add to the page

Work With Places

Join Find People Bookmarks

Edit Layout and Content Manage Places and Pages Set Permissions Choose Skins

Place Edit Layout

Get portlets for: Page 1 This page supports: HTML

Use the controls to the right to find available portlets to add to your portlet list. To add a portlet to the list, click add in the table below. Click OK to return to layout and begin adding your portlets to your page. For more on this topic, choose the help icon above.

Show all portlets

Search for portlets:

Name Contains:

Notes

Modified since(YYYY/MM/DD):

Go

Portlet list:

- NotesViewPortlet
- Document Search
- WebPagePortlet
- QuickLinks
- QuickPlacePortlet

View details

Remove from list

Clear list

Search Results:

	Name	Title	Description	Supported Markups
+	MyNotesCalendarPortlet	My Lotus Notes Calendar Portlet	Displays daily, weekly or monthly views of upcoming events in your Notes calendar.	html
+	MyNotesMailPortlet	My Lotus Notes Mail Portlet	Displays a selected set of e-mail messages in your Notes mail database.	html
+	MyNotesTodoPortlet	My Lotus Notes Todo Portlet	Displays a selected set of Todo items in your Notes mail database.	html
+	NotesDiscussionPortlet	Lotus Notes Discussion Portlet	Displays any view in any Notes discussion database.	html
+	NotesMailPortlet	Lotus Notes Mail Portlet	Displays any view in any Notes mail database.	html
+	NotesTeamroomPortlet	Lotus Notes Teamroom Portlet	Displays any view in any Notes Teamroom database.	html
+	NotesViewPortlet	Lotus Notes View Portlet	Displays any view in any Notes database.	html

Internet

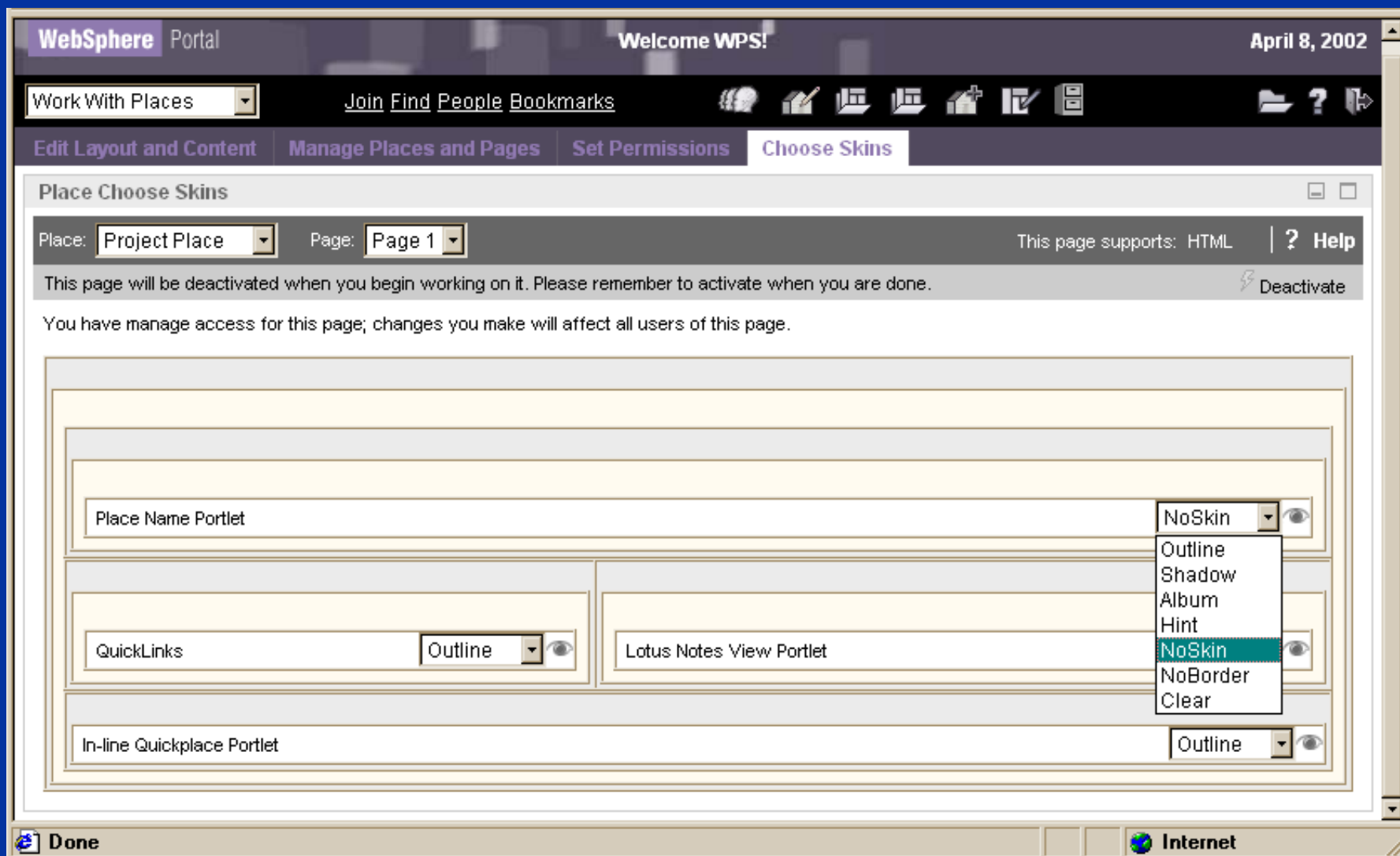
Page Permissions

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

The screenshot shows the 'Place Set Permissions' interface in a WebSphere Portal. The top navigation bar includes 'WebSphere Portal', 'Welcome WPS!', and the date 'April 8, 2002'. Below this is a toolbar with 'Work With Places' and links for 'Join', 'Find People', and 'Bookmarks'. The main navigation tabs are 'Edit Layout and Content', 'Manage Places and Pages', 'Set Permissions' (which is active), and 'Choose Skins'. The 'Place Set Permissions' window shows 'Place: Project Place' and 'Page: Welcome'. It indicates that the page supports HTML, WML, and cHTML. A warning message states: 'This page will be deactivated when you begin working on it. Please remember to activate when you are done.' Below this, a note says: 'You have manage access for this page; permissions you set will affect the ability of users to modify this page.' The interface displays a grid of portlets with lock icons. The left column contains 'Welcome to WebSphere Portal' and 'World Clock'. The right column contains 'QuickLinks' and 'Reminder'. The bottom status bar shows 'Internet'.

Skins

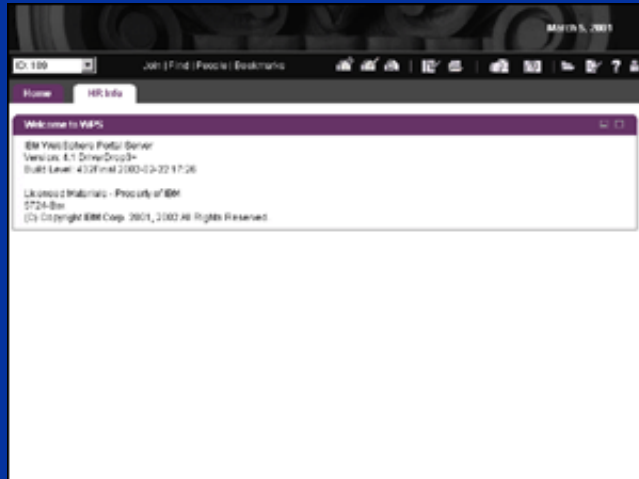
- Portlet decorations



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

Theme Examples



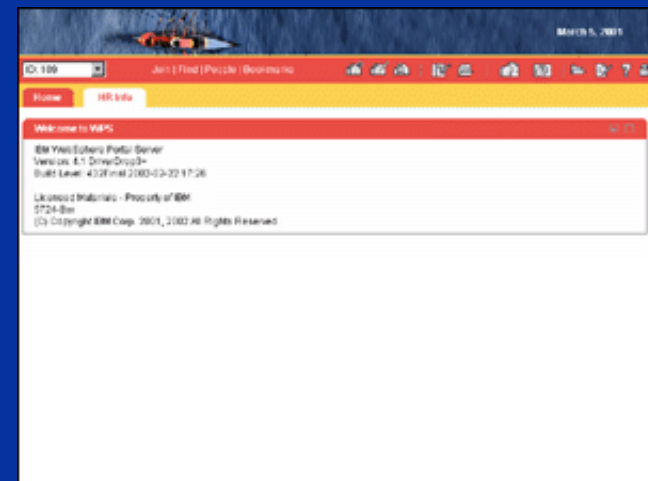
Architecture



Blue Wave



Dunes

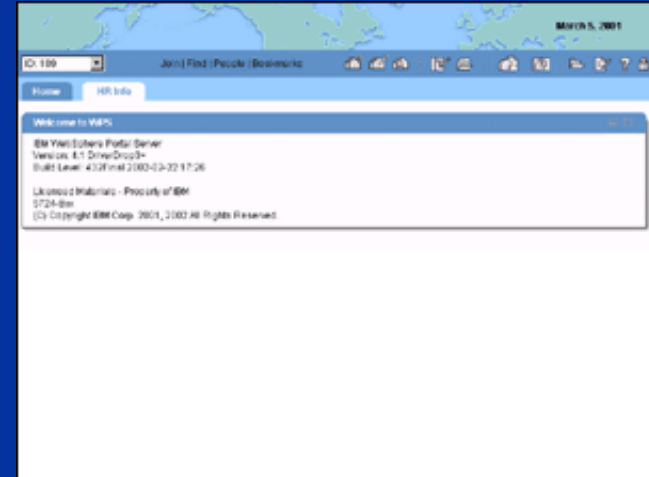


Sport

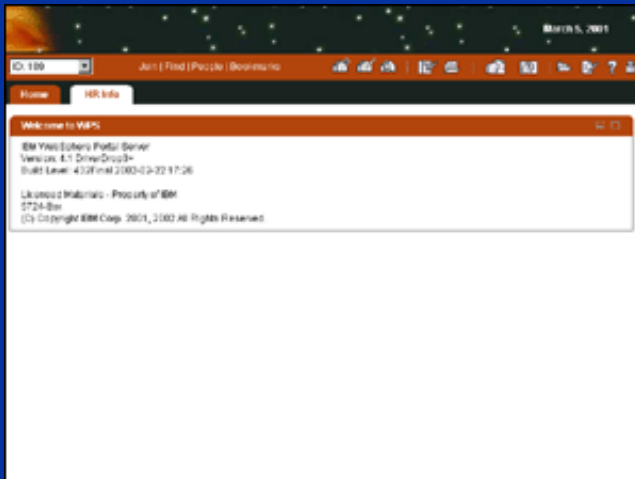
Theme Examples



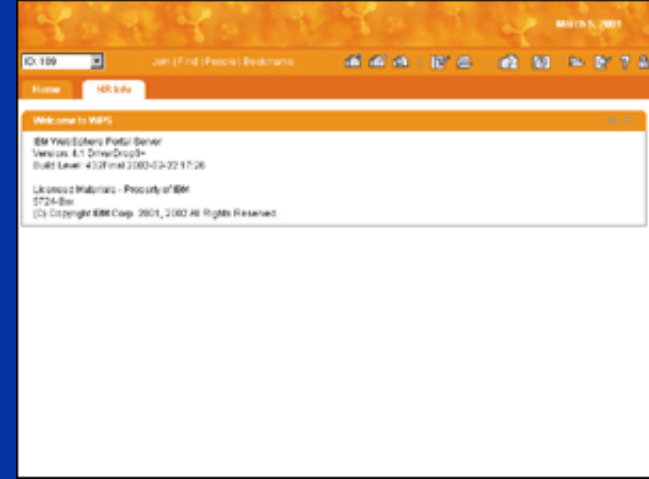
Telecom



World



Space



Molecules

A Collaborative Place

The screenshot shows a WebSphere Portal interface. At the top, there is a header with 'WebSphere Portal' on the left, 'Welcome WPS!' in the center, and 'April 8, 2002' on the right. Below the header is a navigation bar with a dropdown menu set to 'Project Place', followed by links for 'Join', 'Find People', and 'Bookmarks'. To the right of these links are several icons representing different portal functions. Below the navigation bar are two tabs: 'Page 1' (selected) and 'Page 2'. The main content area is titled 'Project Place' and contains three portlets: 1. 'QuickLinks' portlet: A list of links including 'Discovery Server Web Site', 'Google Search', 'IBM Corp.', 'IBM Software', and 'Lotus Software from IBM'. Below the list is a 'Quick Browse' section with a text input field containing 'http://' and a 'Go' button. 2. 'Lotus Notes View Portlet': An empty rectangular area. 3. 'In-line Quickplace Portlet': A larger portlet with a title 'qportlets' and a 'home' link. It features a table of contents with 'Go' selected, and 'Welcome', 'Discussion', and 'Library' as other options. To the right of the table is a red heading 'Welcome to Your QuickPlace!' and a paragraph of introductory text: 'A QuickPlace is a secure place on the Web that you can use to communicate with your team, share resources, and keep track of your project. To get started, click any of the links in the table of contents on the...'. At the bottom right of this portlet is an icon of three stylized human figures.

Portal Administration - Places

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

Administration - Places - Management

WebSphere Portal

Administration

Portlets | **Places** | Members | Portal Settings | Users and Groups | Security | Portal

Place Management | Place Permissions | Place Defaults

Show in list:

Places whose:

Name contains

Only these places:

- Mandatory places
- Personal places
- Public places
- Restricted places

All places

Sort list by:

- Name
- Contact
- Date last modified

Go

Places:

- Home (Public)**
- Welcome Place (Public) MANDATORY
- Place Catalog Place (Public) MANDATORY
- My Place (Personal)
- My Place (Personal)
- My Place (Personal)
- My Place (Personal)
- Jen Restricted 1 (Restricted)
- Jen Restricted 2 (Restricted)
- Jen Public 1 (Public)
- Jen Public 2 (Public)
- My Place (Personal)
- Joyce's PIM Place (Public)
- My Place (Personal)
- My Place (Personal)
- JP 1 (Restricted)
- My Place (Personal)
- JLU's place (Restricted)
- My Place (Personal)
- My Place (Personal)

Show Properties

Arts & Crafts Place

Blah, blah, blah... Description goes here. All the dialog elements should be relative to each other so that if the description is really long, it won't be truncated.

Contact: ● **Jennifer Smith/CAM/Lotus**
E-mail: jennifer_smith@us.ibm.com

Place access: Public
Anonymous: Yes
Mandatory: No

Theme: Pear
Template: Basic shared
Content controlled in template: No
Last modified: 02/02/2002
Created: 03/10/2001

Show members Close

- Join as manager
- Delete place
- Make place mandatory
- Make place non-mandatory

Administration - Places - Permissions

The screenshot shows the WebSphere Portal Administration interface. At the top, there is a header with 'WebSphere Portal' on the left and 'Welcome Portal Guru!' on the right. Below the header is a navigation bar with 'Administration' selected. Underneath, there are tabs for 'Portlets', 'Places', 'Members', 'Portal Settings', 'Users and Groups', 'Security', and 'Portal Content'. The 'Places' tab is active, and within it, there are sub-tabs for 'Place Management', 'Place Permissions', and 'Place Defaults'. The 'Place Permissions' sub-tab is selected, and the main content area is titled 'Set global permissions for place and template creation'. There are 'Save' and 'Reset' buttons in the top right of the content area. The main content area contains four sections, each with a question and three radio button options: 'No one', 'All authenticated users', and 'Specific users and groups:'. Each 'Specific users and groups:' option is followed by an empty text box and 'Add' and 'Remove' buttons. The first section is 'Who can have a personal place?', the second is 'Who can create public places that are open to anonymous users?', the third is 'Who can create shared places?', and the fourth is 'Who can create and edit place templates?'. In all sections, the 'All authenticated users' option is selected.

WebSphere Portal Administration

Welcome Portal Guru!

Administration

Portlets Places Members Portal Settings Users and Groups Security Portal Content

Place Management Place Permissions Place Defaults

Set global permissions for place and template creation Save Reset

Who can have a personal place?

No one

All authenticated users

Specific users and groups:

[+ Add](#) [X Remove](#)

Who can create public places that are open to anonymous users?

No one

Anyone who can create shared places

Specific users and groups:

[+ Add](#) [X Remove](#)

Who can create shared places?

No one

All authenticated users

Specific users and groups:

[+ Add](#) [X Remove](#)

Who can create and edit place templates?

No one

All authenticated users

Specific users and groups:

[+ Add](#) [X Remove](#)

Administration - Places - Defaults

The screenshot shows the WebSphere Portal Administration console. The top navigation bar includes 'WebSphere Portal' and 'Welcome Portal Guru!'. Below this is a breadcrumb trail: 'Administration' > 'Places' > 'Members' > 'Portal Settings' > 'Users and Groups' > 'Security' > 'Portal Content'. The current page is 'Place Defaults', which is part of the 'Place Management' section. The page title is 'Set global place and template defaults'. There are 'Save' and 'Reset' buttons in the top right corner. The main content area contains three dropdown menus and a radio button group:

- What is the default template for personal places?
Welcome Place
- What is the default template for shared places?
Basic Shared Place
- What is the default public place for authenticated users?
Home
- Which place should open when a user logs in:
 - Personal place, if available; otherwise, the default public place
 - Default public place

Administration - Portal Settings for Extend

The screenshot shows the WebSphere Portal Administration interface. The top navigation bar includes 'WebSphere Portal' and 'Welcome Portal Guru!'. A dropdown menu is set to 'Administration'. The main navigation bar contains 'Portlets | Places | Members | Portal Settings | Users and Groups | Security | Portal Content'. The 'Portal Settings' sub-menu is expanded, showing options: 'Portal Settings', 'Companion Products', 'Themes and Skins', 'Manage Clients', 'Manage Markups', 'Manage Search Index', and 'Enable Tracing'. The current page title is 'Set default parameters for the portal'. Action buttons for 'Save', 'Reset', and 'Help' are visible. The main content area is titled 'Default portal language' with a dropdown menu set to 'English'. Below this, the section 'Show on the portal navigation bar:' contains three checkboxes: 'Find (Lets users access the selected search engine.)', 'People (Lets users see and contact people who belong to the places they belong to.)', and 'Bookmarks (Lets users create their own links and access links associated with their places.)'. The 'Find' checkbox is selected, with radio buttons for 'Lotus Discovery Server' and 'Other (enter URL):' followed by an empty text input field. At the bottom, the section 'If a user is not authorized to view a portlet' has two radio buttons: 'the portlet is not displayed' (selected) and 'the portlet is replaced by a message'.

WebSphere Portal Welcome Portal Guru!

Administration

Portlets | Places | Members | **Portal Settings** | Users and Groups | Security | Portal Content

Portal Settings | Companion Products | Themes and Skins | Manage Clients | Manage Markups | Manage Search Index | Enable Tracing

Set default parameters for the portal Save | Reset | Help

Default portal language

English

Show on the portal navigation bar:

Find (Lets users access the selected search engine.)

- Lotus Discovery Server
- Other (enter URL):

People (Lets users see and contact people who belong to the places they belong to.)

Bookmarks (Lets users create their own links and access links associated with their places.)

If a user is not authorized to view a portlet

- the portlet is not displayed
- the portlet is replaced by a message

Administration - Portal Settings for Extend Companion Products

The screenshot shows the WebSphere Portal Administration interface. The top navigation bar includes 'WebSphere Portal' and 'Welcome Portal Guru!'. A dropdown menu is set to 'Administration'. The main navigation bar contains 'Portlets | Places | Members | Portal Settings | Users and Groups | Security | Portal Content'. Below this, a secondary navigation bar has 'Portal Settings | Companion Products | Themes and Skins | Manage Clients | Manage Markups | Manage Search Index | Enable Tracing'. A toolbar at the bottom of the navigation bar includes 'Enable companion products', 'Save', and 'Reset'.

The main content area is titled 'Enable companion products' and contains the following settings:

- Lotus Discovery Server
Server DNS name (for example, server.domain.com):

[Launch Discovery Server Administration](#)
- Lotus QuickPlace
Servers: (for example, server.domain.com):

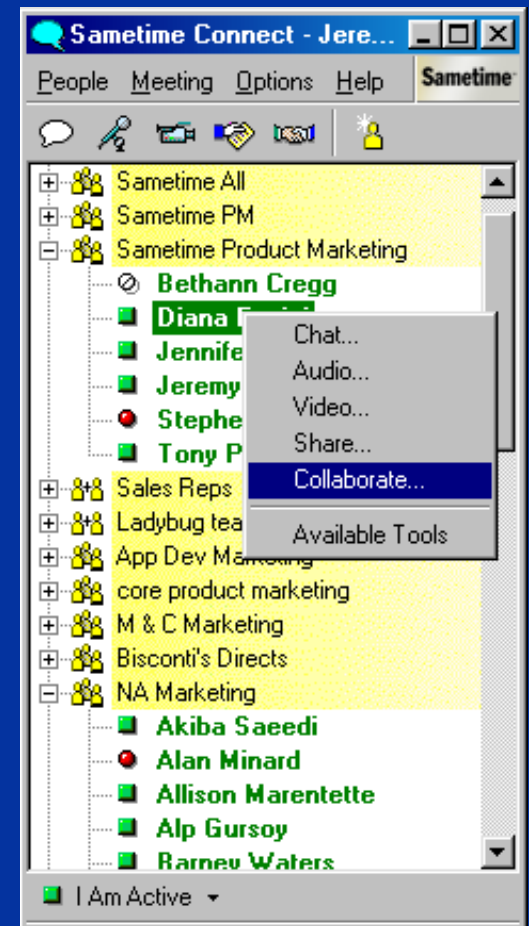
[+ Add](#)
[X Remove](#)
- Lotus Sametime
Lotus Sametime is configured in hostAddress.xml
- Domino Directory
Server DNS name (for example, server.domain.com):



Additional Collaboration Products in WebSphere Portal Extend

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



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

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

WebSphere software

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

Configure Bookmarks Portlet

URI: Name:

- 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/..
 - Peter Herman/Endicott/IBM
 - Philip Monson/CAM/Lotus
 - Prady Mahale/Austin/IBM
 - Ric Topp/Providence/IBM

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/1_dir/Lotus%20ales%20ools%205.nsf/47ac045d8e5ae4be85256984006cf2d2/1a614bc48231978c85256b05006afe32?OpenDocument

Type your chat message here...

Catherine A Webb/Somers/IBM left the meeting.

85 Participants 01:31:20

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

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

GE - Sametime & QP Explosive growth



TRANSFORMATION

Putting e-innovation to work

“...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...”

RECRUITING GE Capital Business Profiles

To Our Customers

Page 1 | 2 | 3 | 4

U.K. partner Hermes Group acquired one of Britain's largest management companies—MEPC—an acquisition that benefits our customers around the world with an even broader choice of real estate space solutions and local market expertise.

GE Capital Aviation Services acquired PK AirFinance, a subsidiary of France's Credit Lyonnais, which allows us to provide senior debt solutions to airline clients.

Beyond acquisitions and joint ventures, GE Capital took advantage of execution capabilities to secure top-line growth with such new and existing customers as Wal-Mart, ExxonMobil, The Home Depot, Nortel Networks and NCR.



A year ago we thought of e-business only in terms of the dot com B to B and B to C worlds. But as we moved through 2000, we found e-business to be much more than selling a few products over the web. In fact, we found it to be the basis for a radical transformation of GE Capital's business model, a change rooted in digitization and Six Sigma focus on customers and their needs—and to reduce or eliminate our costs. With a 2001 IT investment of over \$1.4 billion, we are working with total connectivity...one that uses SameTime or QuickPlace for e-Learning instead of costly classroom training...one centered around our customers and their needs. In accomplishing this, we're striving to become the world's leading financial services company in the world. Digitization is present, but we don't intend to merely take advantage of it, we intend to lead.

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

IBM Soft

Done

Internet

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

The screenshot displays the GE Industrial Systems website. At the top is the GE logo and the text "GE Industrial Systems". A navigation bar includes links for "GE Home", "GE Industrial Home", "Products", "Markets", "Services", "Solutions", "Support", "About Us", and "Contact Us". The main heading is "Applications", with sub-links for "GE Industrial Systems", "Support", "Supplier Relations", and "Applications". The text describes the implementation of projects to improve communications and collaboration with suppliers, mentioning the "GE Global Supplier Network (GE GSN)". It lists two modules: "Invoice Inquiry" and "Sametime", each with a brief description of their functionality. On the right side, there are buttons for "Product Index", "Where to Buy", and "Contact Us", along with a "QUICK SEARCH" section with a search box and a "go" button. At the bottom right, there is a quote: "If we did All the Things we are capable of doing, we would literally Astound Ourselves."

GE Industrial Systems

[GE Home](#) | [GE Industrial Home](#) | [Products](#) | [Markets](#) | [Services](#) | [Solutions](#) | [Support](#) | [About Us](#) | [Contact Us](#)

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.

[Product Index](#)
[Where to Buy](#)
[Contact Us](#)

QUICK SEARCH
Ask a Question/ Keyword
 [go](#)

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

Privacy Policy | Terms of Use | Terms of Sale © General Electric Company 1997-2001

QuickPlace Embedded in the Portal

The screenshot displays a web portal for Swift Bank. The top navigation bar includes "Loan Center", "People", "Find", and "Bookmarks". Below this is a secondary menu with "Home", "Resources", "Tools", "Team Room", and "Help".

On the left side, there are three panels:

- My QuickPlaces:** Contains links for "Loan Officer's Club", "Project XYZ", "Customer QuickPlace", "Teamroom", and "Service Team Extranet".
- Team Bookmarks:** Contains links for "Swift Bank Internet", "Mortgage.com", "w3.swiftbank.com", "Investor Services", and "Knowledge Base".
- Search:** A search box with the placeholder text "Enter search string".

The main content area is titled "Swiftbank Project Calendar - QuickPlace". It features a sub-navigation bar with "Welcome", "Discussion", "Library", "Calendar", "Tasks", "Index", "Customize", and "Members". Below this is a breadcrumb "Home>Calendar" and buttons for "New Calendar Page", "New...", and "Folder Options".

The central element is a calendar for January 2002. The calendar grid shows the following dates:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Below the calendar, it states "Times shown are: Eastern Standard Time (GMT -5:00)". At the bottom left of the calendar area is a "Go To Top" link.

GenCo Olive Oil
Request For Proposal

Message Board
 Welcome
 Sales:
 Development:
 Discussion
 Library
 Calendar
 Tasks
 Index
 Customize
 Members

Whats New
 Search
 Help
 Tutorial

My QuickPlaces

New Page New... Cleanup Folder Options

Discussion

Title	Author	Modified
Final GenCoRFP (ready to go!) 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...	Charlie Hill	02/04/2002
GenCoRFP 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...	Mustansir Banatwala	01/30/2002
GenCoRFP (Revision #ST-6B8C) 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...	Helen Dai	01/25/2002
GenCoRFP (Revision #ST-BBAB) 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...	Mustansir Banatwala	01/25/2002
GenCoRFP (Revision #ST-F1EE) 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...	Stephen Londergan	01/25/2002
Original GenCo R... Final: Dal... R... G... S...	Charlie Hill	01/22/2002
Detailed SCHEDULE... et al. Pla... Assignm... AttachD... D) PRODI... effect tha... Demo pl...	Helen Dai	01/22/2002
Lotosphere 2002 Demo - QuickPlace 2.6 Script Technical Requirements Overview	Sami Shalabi	02/04/2002
Pages 1 - 11 out of 11 (including hidden p...)	Stephen Londergan	01/22/2002
	Charlie Hill	01/22/2002
	Stephen Londergan	01/22/2002

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

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

Lotus Discovery Server Integration

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

The screenshot displays three windows from the Lotus Discovery Server interface:

- Lotus Discovery K-map:** A window with a title bar and standard OS controls. It contains instructions: "To browse the K-map, click Launch K-map. To search the K-map now, enter search criteria and click Go." Below the instructions is a "Launch K-map" button, a "Search:" label, a dropdown menu with "everything about" selected, a text input field containing "java", and a "Go" button.
- Lotus Discovery Mini-Search:** A smaller window with a title bar and OS controls. It contains a "Search:" label, a dropdown menu with "people named" selected, a text input field containing "Chris", and a "Go" button.
- Lotus Discovery Search Results:** A window with a title bar and OS controls. It displays search results for "documents about java". The results are shown in a table with columns: Score, Title, Date Modified, Author, and File Type. The results list several documents with their respective scores, titles, dates, authors, and file types.

Score	Title	Date Modified	Author	File Type
75	From Center of Competency They can't access their test mal	09/07/2000	Karen O'Dea/CAM/Lotus	Lotus Notes
75	Steps to reproduce: Create a user with no first name, i.e. "tester01". note.ini	11/01/2000		ini File
75	[Notes] Directory=D:\Lotus\Raven\Data KitType=2 SetupDB=SetupWeb.nsf UserName=lotus CompanyName=lotus dev corp RDSVersion=Kit1026000Afternoon with LP46 and Domino 5.05 DEBUG_ALLOW_ZERO_BLOCKS=1			
75	Bob: Please see first if this happens in the real build wi	05/09/2000	Wilfred Holder/CAM/Lotus	Lotus Notes
74	Install Raven as usual. Dir Synch the usual sources (in this cas	09/13/2000	Richard Hudak/CAM/Lotus	Lotus Notes
74	Install Raven as usual. From the maintenance Navigator, choose Metrics Reports and "Add a Report Definition."			
74	Open Kmap and do a document search on a term that brings	10/26/2000	Dane Johnson/Iris	Lotus Notes

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

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>