IBM® Workplace™ Services Express

FOR DUMMIES®

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About the Author

Stephen R. Londergan has been on the collaboration bandwagon since 1989, and this is his tenth book about it. During the day, he works for IBM, and lives near Boston with his wife, Robyn, and three sons, Michael, Richard, and John. In his spare time he enjoys writing pithy little paragraphs about himself.

Dedication

For my friend Cindy Pratt, who passed away in 2005. Cindy helped me out when I was just a pup, back when Lotus Notes was a new baby, and the entire, worldwide Notes team all fit in that one brick building, right next to Boca Grande. Cindy's sparkling intelligence and sense of fair play were evident to everyone who had a chance to know her.

Author's Acknowledgments

My name goes on the cover, but lots of people had a hand in what you see in this little yellow jewel. So I'd like to send a big WSE For Dummies shout out to Nicole Haims, for making sure that I say what I'm supposed to say when I am supposed to say it; to Jim Murphy of Strategic Computer Solutions for his WSE, portal, and hardware expertise; to Professor Firas Yasin, for his just-in-time expertise when I was up against a key and really tight deadline; to Mike "the green monster" Loria, for his kind words in the Foreword; and to Karyn Thompson-Panos, for making this whole thing possible, all the way from Colorado.

Contents at a Glance

Table of Contents

Part V: Making IBM Workplace Services Express Your Own...207

Foreword

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*T*he workplace is everchanging — once an office you visited with your briefcase stuffed with papers, it's now a digital, virtual, pervasive place in cyber space. The digital age is here and nowhere else is it developing as rapidly as in businesses around the world: Letters are now emails; phone calls are now instant messages; reports are now electronic presentations and spreadsheets; and meetings are rarely face to face, but rather virtual encounters over the Web. With digital communications at our fingertips, we can work from home, a favorite coffee spot, or just about anywhere. So the workplace keeps changing, but the nature of work has not. We still need to share information, collaborate with colleagues, support customers, innovate on new product designs, take orders, manage complaints, and, of course, make lists of all the things we have to do — only faster than ever before. Enter technology, in the form of products like IBM Workplace Services Express, and we can not only perform all kinds of work in today's virtual workplace, we can significantly improve it.

This book captures two fundamental, important aspects of working with IBM Workplace Services Express. First are the technical considerations — the features, capabilities, customizations, and recommendations on how to use and personalize your IBM Workplace Services Express system. Then, this book goes on to provide insight into the business value and implications of applying this technology to your organization. You'll see how capabilities in the product can improve your business processes, streamline your operations, provide better business control, and improve the collaboration and sharing of information for your team, workgroup, or organization.

Stephen Londergan has been a pioneer in this industry from the early days of Lotus Notes, through the first Webbased collaboration products, to today's workplace technologies. There is no one better to write a book on both the technical and business considerations of deploying collaboration, document management, and Web technologies. Steve has worked with companies of all sizes across the world and has a rich knowledge of customer needs coupled with a fine skill at explaining how to apply technologies to meet those demands. Combining a recognized industry expert with an industry-leading product makes for great reading; and more important, great opportunities for you to learn how you can bring your workplace and teams into the digital age.

Michael Loria

Director, Worldwide Channels and Product Marketing

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Introduction

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*F*irst off, thanks for buying your copy of *IBM Workplace Services Express For Dummies.*

The intent of this book is to provide you with an introduction to and overview of IBM Workplace Services Express (WSE). WSE is a fairly new product (it came upon the world at the end of 2004) that helps teams (both big and small) work together, collaboratively and in real time, to get projects of all kinds (both big and small) done.

What's most exciting, in my humble opinion, about WSE is how it puts so many tools and technologies in the hands of small- and medium-sized businesses — tools and technologies that have been traditionally only available to large enterprise companies. WSE can help a little guy feel like one of the big guys.

Foolish Assumptions

Without so much as a phone call, I make the following assumptions about you, dear reader:

- ✔ You want to know *what,* but not necessarily *why.* I leave the why to the computer nerds and concentrate on what's important to getting you working with IBM Workplace Services Express, ASAP.

- ✔ You have access to a server on which someone has already installed IBM Workplace Services Express 2.5.

How This Book Is Organized

The arrangement of the chapters in this book reflects the order in which most people become familiar with the various aspects of IBM Workplace Services Express.

Part I: Getting Rolling with Workplace Services Express

In the first part of the book, I get a few of the inevitable definitions out of the way so that you can jump right into getting WSE up and running. Reading Part I is like finding out what all those dials on the dashboard are for before you drive your brand-new car.

Part II: Making Use of the Main Features

The second part of this book deals with the things you'll most likely use WSE for the most. I focus on a couple of key features — the WSE Welcome page (your home base for everything WSE related) and the People Palette, which shows you how to find and (most important) communicate with teammates.

Part III: Getting Involved with Team Spaces

Team spaces are wicked, wicked important (as we say in Boston). So Part the Third is all about how you can use team spaces and the contents you'll find therein. There are a lot of good chapters in this book, but those in Part III are my favorites. You can find out exactly what team spaces are, use WSE tools to get them working for you, and communicate with teammates in ways you never dreamed. (How about setting up a discussion forum to handle FAQs on your newest product or having a chat room discussion in lieu of a five-minute status meeting?)

Part IV: Sharing and Safeguarding Documents

Almost every team produces documents (most by the ton), so Part IV explains how you work with documents, spreadsheets, presentations, and the like. I also use this part to explain the hierarchy WSE uses for organizing documents in its document libraries so that when you need to find (or publish) a document on the fly, you know what to do.

Part V: Making IBM Workplace Services Express Your Own

Part V tells you how to make WSE work just the way you want. Have it your way, as the burger joints say. The tools described in this part show you how to use forms to set up a team space. You also discover how to change the way you view content, how to modify team space templates, and, if you have administrator-level access, how to set up the access rights of the users on your team.

Part VI: The Part of Tens

Every *For Dummies* book has a Part of Tens — so why should this book be any different? Get easy access to a simple list that reminds you what you need to do to make WSE perform for you, find out how to avoid pitfalls, and get specialized information if you're a Windows user or a Linux user.

Part VII: Appendixes

Part VII contains some supplemental information that I couldn't jam in the first six parts — but these appendixes are worth a read, nonetheless. You can find out how to set up your current mail program to interact with WSE, how to set up the desktop components, and more.

Icons Used in This Book

I've scattered scads of little pictures (called *icons*) all across the pages of this book. Read on to see what each kind of icon is about.

This icon tells you that some little shard of knowledge is coming your way to make your life with WSE just a bit easier. Tips are definitely worth reading.

As you stumble along the pathway of life, these little commandments are things that you should never forget. For example, you should always . . . well, it had something to do with, ummm. . . . I'll come back to this later.

Ignore these at your own peril. You've been warned.

This icon marks the items that will appeal to your inner geek.

Conventions Used in This Book

This book uses *conventions* with the idea in mind that if information is communicated in a standard way, it's easier to understand at a glance. For example, new terms are italicized, indicating that a definition follows. Here are some of the other conventions used in this book:

- ✔ Anything you (the reader) are asked to type appears in **bold.**

- ✔ Web addresses *(URLs)* are listed in a special font, like this:

    www.dummies.com

- ✔ IBM Workplace Services Express has a lot of clickable buttons, icons, and links. In fact, anything that appears underlined in the program is clickable. I differentiate between buttons and links by underlining links, like this: Click the Hide Advanced Options link.

- ✔ If I ask you to click a sequence of menu options, I use a command arrow (⇨) to demonstrate the sequence. Think of the command arrow as shorthand. For example, if I say choose More Actions⇨Delete, I mean click the More Actions button, and when the drop-down list appears, click the Delete option. My way's faster and more convenient, right?

Where to Go from Here

Okay, get going; you have a lot of reading to do.

Part I

Getting Rolling with Workplace Services Express

The 5th Wave

By Rich Tennant

"We're much better prepared for this upgrade than before. We're giving users additional training, better manuals, and a morphine drip."

In this part . . .

When you start using any new computer software, it's best, as they say, to walk before you run. Start with the basic information about how you get started, and get a handle on the big picture about how the program works. Needless to say, most people just jump in, start using the software, make a ton of mistakes, get mad, and finally, after some sputtering and fuming and complaining, turn to the instructions.

IBM Workplace Services Express (WSE) is an innovative and flexible program. The chapters in this part prepare you to use WSE to its full potential without wasting a lot of time, developing bad habits, or cursing the program because you can't figure out how to get started.

Of course I do my best to avoid techno babble whenever possible, but sometimes actually knowing the official vocabulary terms actually helps. If you call your help desk and say, "The thingy next to the hinkyminky returns a box that says something about a team space when I click it," you can bet three things: you haven't been helpful, the help desk can't help you, and whoever answered the phone at the help desk is probably laughing at you. Part I is designed to orient you and give you what you need to know to start using WSE.

Chapter 1

Collaboration, Portals, and You

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In This Chapter

▶ Understanding collaboration and portal software

▶ Introducing IBM Workplace Services Express

▶ Getting more productive with IBM Workplace Services Express

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*I*BM Workplace Services Express is software that helps you and your teams work together, collaborate, and share information. In the simplest terms, WSE provides a team or project with a home page — so that all people, documents, and information about the team or project are collected and available in the same place.

WSE has a lot more going for it than just its easy-to-use browser interface; it's a flexible product that can be customized to meet just about any team's needs, and it includes built-in tools like instant messaging, document management, and a portal. With WSE, your team can work together in ways you probably haven't even dreamed of yet.

With most new software, there's always a little bit of a waiting game — you have to invest a certain amount of time in figuring out how to use the software and customizing it to suit your needs. And with some types of software — portals in particular — you may even need to know a little Java and HTML before you're ready to get the most out of your new investment. Fortunately, that's not the case with WSE. Even though it is flexible and customizable, this software comes preloaded with lots of templates and collaborative tools so that you may not need to customize it at all — you're ready to roll, right away.

This chapter gives you the lowdown on what this software does, and how it helps you and your teams work better, faster, and more collaboratively. It also shows you how to get logged in and ready to get to work.

Taking a Look at Collaboration Software

Collaboration involves working together. When people collaborate with each other, they work jointly toward some tangible goal. In the world of software, collaboration has taken on a special meaning — it's a whole class of software, different from all others. The two main functions of IBM Workplace Services Express collaboration software are

✔ **To help a team of people to work simultaneously on a project without making a big huge mess.** Most of us don't work alone, and most people would agree that most documents are improved if more than one person helps to write and edit them. Unfortunately, that's where productivity software (like Microsoft Office) falls down — unless your team is all in the same room looking over your shoulder while you type (which sure sounds pretty annoying), programs like Word just aren't so hot at helping a team of people work together.

✔ **To easily share the products of your work (documents and the like) with a large group of people.** You may produce the best report in the history of your company, but as long as it's buried on your computer in `C:\My Documents\reports\q4`, you're not getting that promotion and raise. You have to either print that baby out and hand it to your boss, or (more likely these days) e-mail it as an attachment. The bummer is that the sharing part of this little exercise is different than the producing part — you have to use one program to create the document, and now you're probably using something else altogether to print it or e-mail it.

Collaboration software differs from *productivity software* (software suites like Microsoft Office and Lotus 1-2-3) by extending its functionality. WordPerfect and Microsoft Word, for example, help you produce really great word processing documents — like press releases, resumes, reports, and letters to your sweetheart. WSE helps you work on such documents with others, while simultaneously making them readily available to anyone who wants or needs to see your work.

WSE is special in the way that it combines collaboration technology with a *portal,* while making both so easy to use and easy to swallow. Figure 1-1 shows a sample home page for a team, and as you can see, it's chock full of tools and information.

Figure 1-1:
IBM
Workplace
Services
Express has
lots of tools
and ways to
make you
and your
teams more
productive.

Combining Collaboration, Communication, and Document Management

One of the best things about IBM Workplace Services Express is that it includes a lot. The bottom line to the next few sections is that WSE brings you a comprehensive set of tools, all wrapped up in a bow, *and* packages them such that you are ready to hit the ground running.

Moving past simple e-mail

When you think about it, sharing a document with others — whether you want them to add comments, help you write it, or just have it available as a reference — is an endeavor not well suited to e-mail. The minute you need more

than one other person to work on your document, e-mail just isn't the answer, because you get in a rat hole of wondering who has the latest version of the document, who e-mailed it to whom, when it will be finished, and so on.

In this day and age, the files and documents you need to share are probably pretty big — PowerPoint slides in particular always seem to take up multiple megabytes, for example. So there's another case where e-mail just doesn't cut it; e-mailing all those huge attachments around just leads to wasted disk space and bloated, hard-to-manage inboxes. There has to be a better way.

All of these problems — working with a team to author documents, finding ways to conveniently share and publish documents to a wide audience, and overcoming the inboxes that are stuffed to the gills with giant attachments — gave rise to a new kind of software, known as *groupware*. Think of WSE as groupware-plus. It takes familiar groupware functions to the next level. Take a look at "Moving past discussion databases" for more information.

Many people think that the first and best groupware is a little gem invented in the early 1980s, in Cambridge, Massachusetts — known as Lotus Notes. Rumor has it that there is even a really, really good book about this software, known as *Lotus Notes For Dummies* (Wiley), written by this really, really great guy.

Moving past discussion databases

Groupware is a type of collaborative software that uses special shared data-bases to help people share information and hold discussions. Discussions are actually a pretty important part of the collaborative process — the idea of being able to continuously talk about a document, customer, or project in question (even across the miles, without making a special trip or picking up the phone) is a really, really, big deal (RRBD).

Groupware is a beautiful thing, but it has a couple of limitations:

✔ Groupware usually needs client software that your company has to purchase, install, and maintain. Software like Lotus Notes, Microsoft Outlook, and Microsoft Office is absolutely the right answer for some people, but not all, especially when some of the people on the team aren't employees of your company. If you want to extend collaboration to business partners or customers, for example, dictating what version of Lotus Notes they need to use or expecting them to purchase and install a certain version of Microsoft Office usually isn't practical.

> WSE solves this limitation by being browser-based. That alone makes collaborating outside your firewall easier, because you don't have to present your customers with a laundry list of software that they need to purchase and maintain in order to work with you. WSE works with all of the popular Web browsers — including Linux — so you can invite just about anyone to your little WSE party.
>
> ✔ Although most teams and projects are very much about documents and discussions, documents aren't everything. Consider a sales team — documents such as *requests for proposals* (or RFPs) and product spec sheets need to be produced, but sales staff also need access to other information in order to be most productive. Maybe sales staff uses an Oracle database to track sales transactions, and of course people always need access to their e-mail.
>
> WSE solves the second limitation by including a built-in portal, which I discuss in the following section, "Knowing what to do with a portal."

Knowing what to do with a portal

Collecting different kinds of software and applications together is the business of *portal software,* often simply referred to as *portals.* Technically speaking, IBM Workplace Services Express is based, in part, on IBM WebSphere Portal software.

Portals are especially good at combining and aggregating information and applications from many different places. Portals are just the ticket when you want to give a person one place to go to access e-mail, and collaborative team spaces, *and* document libraries, *and* Oracle databases, and so on. When all of these electronic destinations are put together and use the same user interface, you have a portal situation on your hands. The good news is that a portal can bring together information from just about anywhere.

REMEMBER

The bad news about portals is that building such an animal is not for the faint of heart. They can be complicated to build and manage. That's really not that surprising; any software that combines lots of other software and applications is, of course, going to have a lot of moving parts.

In the parlance of our day, portals are made up of and use something known as *portlets* — which are pieces of code, used to connect to that other application. A typical portal needs a portlet to connect to your e-mail system, another portlet to connect to the Oracle database, a portlet for collaboration-related activities, a portlet for the document libraries, and so on.

The challenge with most portals is the age-old dilemma of time and money. Creating portlets, even if you know how, takes development time, and is likely to have you reaching for your wallet if you'd rather pay someone to do that for you.

You're not alone if portals and portlets sound a little scary. Creating your own portlet usually requires pretty hardcore computer programming know-how, deep database skills, and more than a passing knowledge of Java.

WSE includes a portal, and perhaps more important, includes a bunch of portlets. WSE jumpstarts your team and projects, and saves you the time and money of developing and maintaining all those portlets on your own. WSE has room to grow — so if and when you do need to create your own portlets, you can add them. But the big important point (BIP) here is that the built-in portlets mean you hit the ground running.

Understanding What IBM Workplace Services Express Does Best

The most important benefits of IBM Workplace Services Express are its speed and ease of use. Because you can create new team spaces and WSE applications without knowing much about Web programming, you quickly discover that the more you use WSE, the more you want to use WSE.

In fact, for most companies that use WSE, the software becomes an important part of just about every project — a new project's kickoff meeting may very well include an action item for someone to "go set up a new team space." In most organizations, individuals usually belong to lots of different teams, and the same is usually true with WSE — you belong to and have access to lots of different WSE *team spaces*.

Essentially, a team space is home base, where all members of your team go for anything related to your project. But there's a lot more to team spaces than that. I show you exactly what a team space is all about in Chapter 6.

So what is WSE good at? WSE facilitates projects and organizes teams in the following ways:

✔ Providing a team home page so that everyone knows where to go for the project's status, milestones, and more.

✔ Enabling the collaborative production of just about any kind of document.

✔ Providing people with access to many different kinds of applications through a WSE portal.

✔ Enabling external collaboration so that your business partners or customers have access to your team space, its documents, and so on.

✔ Enabling you to publish content so that people know where to go to find policies and procedures, manuals, process documentation, and other essential material.

✔ Improving your ability to track the status of your projects, enabling you to keep track of all of the events, meetings, milestones, and tasks that are part of the project — all in one place that everyone can access.

Putting the I (BM) in Team

A team is a group that works together toward a common goal. You probably belong to lots of different teams, both at home and at the office. In one sense, your entire organization or company qualifies as a team, as does your department or division.

Teams also come together on a more *ad-hoc* or project basis — for example, a new initiative may require a few people from a few different departments to put their heads together to find the best way to implement it. Ad-hoc teams tend to be short lived — the team comes together to do what it needs to do, then the team members do what they need to do, and then the team dissolves. In many companies, teams and projects constantly form and dissolve. In fact, the team that comes together this week may repeat what last year's team did — only this time around with different people.

No matter what kind of teams you belong to or lead, WSE has been built with features to specifically support your functions, goals, and activities. For example, WSE has functions that address the following common team activities:

✔ **Content creation:** Whether you focus on Office documents, Adobe PDFs, *computer-aided designs* (often called CAD drawings), or some other content, your team probably creates a content product.

✔ **Sharing:** Your team needs to share information, content, dates, ideas, and make decisions. 'Nuff said.

✔ **Bringing people together:** Okay, it sounds trite, but the people on a team are the most important thing that any team has going for it. You need to bring them together.

✔ **Scheduling:** Just about every team or project has a time dimension to it, usually an end date when things have to be finished, and a series of meetings and milestones leading up to that end date.

✔ **Meeting goals:** Whether it's releasing a new product, responding to some sort of market development, producing a new product, or helping a customer, the very essence of a team is the common goal that its members all share.

REMEMBER

Most people find WSE ready to go, right out of the box, but customize it to suit their own particular needs, over time. What's important is that the product offers the flexibility to adapt to your projects, and doesn't force you to adapt to it.

WSE enables you to focus on the job at hand. If you lead a sales team or you're an accountant by training, you can keep selling or keep accounting without having to invest a lot of time and resources in figuring out how to use WSE, or worrying about how your team and project need to adapt to WSE; instead, WSE adapts to your team and your project.

Understanding the Benefits of Using a Server

The basic premise behind IBM Workplace Services Express is that you use your Web browser (Microsoft Internet Explorer, Netscape Navigator, or Mozilla Firefox) to connect with a WSE server.

You probably won't have to worry too much about that WSE server. Suffice it to say that it's a pretty powerful server (or maybe multiple servers) configured and set up by your company's IT department. In fact, one beauty of WSE is that, because you probably get to be insulated and protected from all the complicated Web server management tasks and burdens, you can focus on getting your job done. You just use your browser to create team spaces, exchange instant messages, and handle documents, without sweating all the technical minutiae that's involved in running the WSE server.

Here's a list of benefits to using WSE on the server:

- ✔ **Sharing is that much easier.** Using a WSE document library or team space is an easy and painless way to put documents in a place your whole team can access, and a great way to make sure that all of the documents, people, and information about your team or project are stored always available and in one place.

- ✔ **You and your teammates can log in from just about anywhere and experience the same work environment, windows, menus, and documents.** Unlike other kinds of software, WSE is a lot more portable. No matter where you are when you log in (work, home, Starbucks, Tibet), what you see is always the same. As long as you have an Internet connection and know your server name, username, and password, you're good to go.

✔ **You have new options for creating content.** As you see in Chapter 12, WSE comes with built-in document editors that give you new choices and alternatives for creating content. Simply put, using WSE means you might not have to purchase Microsoft Office for some team members.

✔ **Keeping all those team spaces on the server means that system maintenance — like backups — is a snap.** It also means your work environment is more secure, because your team's important information is all collected in one central place instead of being scattered over the individual workstations of the team.

Have you ever left your laptop in a cab, or had it stolen? You (and your team) are at much less risk that confidential information will be lost if you use WSE. Should you drop your laptop in a murky swamp or spill a pot of coffee all over it, your documents and information are safe and sound because they're not stored on your hard drive; they're on the WSE server.

✔ **WSE servers can be set up for external access.** That means that if your team extends outside your company or organization, those business partners, customers, or trading partners can also access and use team spaces and document libraries. That's not always something you *want* partners to be able to do, of course, but the fact that it's possible offers some intriguing opportunities: Imagine inviting a business partner to help you respond to an RFP, or imagine having a team space set up so that your customers can log in and have direct access to your customer service team and materials.

You can connect to the WSE server for many different reasons, but as you see in Chapter 6, you're most often going to use WSE to access a team space. If you belong to many different teams and work on many different projects (of course you do), don't worry — you can have as many different team spaces as you need.

Your WSE server has its own special address, which is just the Uniform Resource Locator (URL) that you plug in to your Web browser. I can't predict what, exactly, your WSE server's URL is going to look like, but it'll probably be something along the lines of `http://yourcompany.com:9081/lwp/myworkplace`.

Chapter 2

Start Me Up

. . . .

. . . .

*I*BM Workplace Services Express is server-based software that you and your team access with your Web browser. Having all of your work and all of the content related to your team on a server has lots of advantages, the most important of which is that the server is a central location, to which the entire team has access.

In this chapter, I take a look at the big picture, and see how you log in, and when necessary, register to use WSE.

Getting Everything You Need on a Single Server

Chances are you'll come to think of your entire collection of WSE team spaces, document libraries, home pages, and so on as just another Web page, because accessing them is just a matter of using a bookmark or typing a URL in your browser.

But there's a lot more happening under the covers. Part of the reason a lot of companies use WSE is so that they don't have to know about all the under-the-hood technology that it takes to make WSE hum. However, at least a passing familiarity with the inner workings of WSE pays off in the long run.

TIP

In its simplest incarnation, WSE runs, self-contained, all on one server, which uses the Microsoft Windows, Linux, or IBM iSeries operating system. If you already have one of these operating systems installed, installing a new WSE server is promised (by IBM) to take under an hour; after that, you're ready to go.

Using a Second Server if You Can (Or Must)

The good news is that this single-server setup is incredibly easy to use and manage, but the bad news is (or may be) that a single WSE server is really only practical for the smallest business configurations. If your company has just a few team spaces, anticipates small document libraries, and so on, you are probably more likely to get away with a single-server setup than if your business and teams are mid to large sized.

Here are some reasons to consider a two-server WSE setup:

✔ **If you already have a directory server:** The most common reason to use WSE on more than one server is for the sake of a directory. Chances are your company already has a separate directory server, which keeps track of and stores everybody's usernames, passwords, and group memberships, among other things. Although WSE does include its own directory, it's pretty common (and usually a good idea) to integrate WSE with an existing directory server, such as the one that your company probably already has. Combining directories means less work for your WSE server (one less thing for it to worry about, so to speak), and also means that employees can log in with the same username and password they use for all of the other applications and systems at your company.

✔ **If you need bigger, faster team spaces and document libraries:** All WSE documents and information are stored in a database. Using a separate server for this database frees up capacity on your WSE server, and also means that you can have more people using the system at the same time. Using a separate server for the WSE database also means that WSE can handle larger document libraries and more team spaces.

REMEMBER

You probably don't have to worry about all these behind-the-curtain workings of WSE. To most users, WSE is just a Web page that is easily accessed via a bookmark. Whether your company has WSE configured on one server or several, you always access it the same way, and you likely won't know about or care about the way your company has WSE set up. These details are very definitely the province of your company's overworked and dedicated system administration staff.

Logging In to WSE

Logging in to your WSE server is the first thing you do whenever you want to use WSE to visit a team space, view your e-mail, find and read a document in a document library, or see if your teammates are online and available for a chat.

As you can see in Figure 2-1, logging in to WSE is a fairly simple affair.

Follow these simple steps whenever you want to log in to your WSE server:

1. **Go to the main WSE page.**

   Either type your WSE server's address in your browser or choose your WSE server's name from your list of bookmarks or favorites.

   I lack the power to guess your WSE server's URL; someone in your company's IT department will tell you what it is.

2. **Enter your user ID in the User ID field.**

   Your user ID and password are case sensitive, so watch out for that Caps Lock key.

Figure 2-1:
Enter your username and password to use WSE.

3. **Enter your password in the Password field.**

    When your IT department sets up WSE for the first time, you may receive a default user ID and password. If you're given a default password, you should change it as soon as possible.

4. **Click the Log In button or press Enter.**

Chapter 3 goes into details about what, exactly, you can expect to see after you log in, but your basic WSE Welcome page probably looks something like Figure 2-2.

You may have to set up your user ID and password yourself, or they may be assigned to you. In many organizations, the user ID and password you use for WSE are the same as the user ID and password you use for other applications. If you're not sure what your WSE user ID and password are, ask your project or team leader.
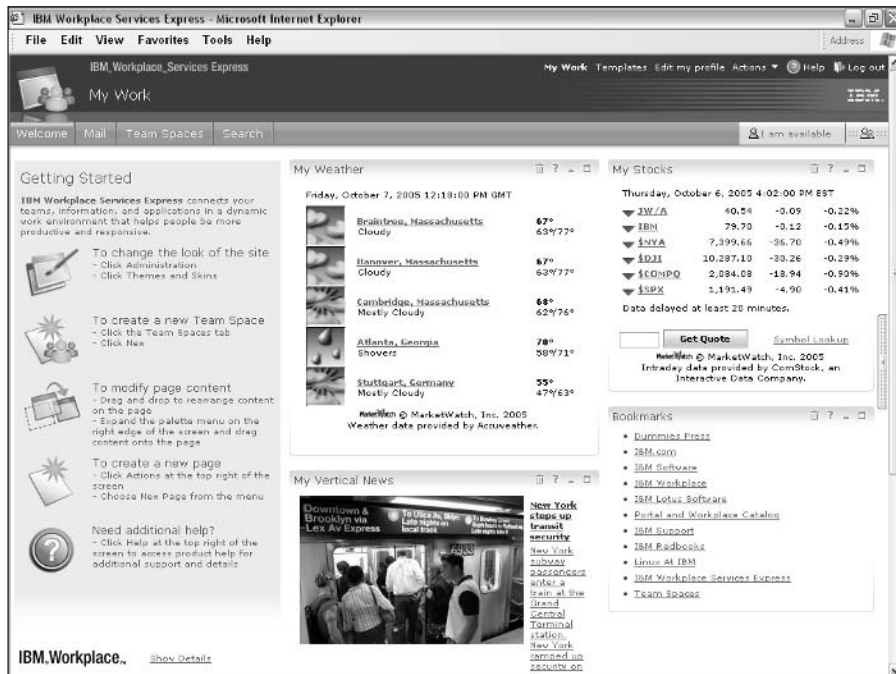
Figure 2-2: Your WSE Welcome page probably looks like this.

What to do when (not if) you forget your password

When you forget your password, all is not nec- essarily lost — your administrator most likely has instructions on how to get a new password issued. The first step is to click the I Forgot My Password link in the upper-right corner of the WSE home page. What you do next depends on your company — you see instructions that either tell you what to do, how to re-register, or who to call to have a new password issued.

When you reset your password, take care to choose one that is both easy for you to remem- ber and hard for someone else to guess. Including a few digits is always a good idea; some companies even have very specific rules and policies about the passwords you can use.

Making your WSE password the same as, say, your ATM password is *not* a good idea.

Registering for the first time

Some WSE servers (usually WSE servers that are on the Internet and fairly public) are set up so that you can register to use them yourself; in other words, rather than having a user ID and password assigned to you, you get to pick your own. You only have to register once, of course, on the very first day that you use WSE.

If you're not sure whether you need to register, ask someone before forging ahead, because you wouldn't want to register yourself if your administrator is instead expecting you to use a user ID and password that have been cre- ated for you.

Use the following steps if you've been told you should register to use WSE, and that you should set up your own user ID and password:

1. **Go to the main WSE page.**

   Enter your WSE server's address in your browser or choose your WSE server's name from your browser's list of bookmarks or favorites.

2. **Click the Sign Up link in the upper-right corner of the WSE server's Welcome page. Refer to Figure 2-1.**

3. **Fill out the User Sign Up form to select a user ID and password, paying special attention to the required fields.**

   Required fields are conveniently marked with asterisks. (See "Filling out the User Sign Up form," later in this chapter, if you want detailed information.)

4. **Click the Continue button on the User Sign Up form.**

5. **If everything looks okay on the Sign Up Confirmation page, click the Continue button again.**

 If you notice a mistake, click the Cancel button to back up a step and re-enter any of the information.

6. **Click the Continue button one last time to confirm your user registration.**

After you complete this process, you're good to go, and you can use the log in process described earlier in this chapter (see "Logging In to WSE") to start using WSE.

Filling out the User Sign Up form

As you can see in Figure 2-3, the User Sign Up form has a dozen fields to be filled out, some of which are required.

Figure 2-3: The User Sign Up form is where you define your user ID and password.

The most important fields on the User Sign Up form are the ones marked with asterisks; you have to fill out those required fields in order to register. But unless you're in a real hurry for some reason, you should take the time to fill out the regional fields, too.

Here's a list of the fields on the User Sign Up form, and some guidance about what each field is used for:

- ✔ **User ID:** This is the most important field because what you enter here today becomes the user ID that you use to log in to WSE every time you use it. (You may want to rethink using `snaggletooth` as a user ID.) This field is so important that your company may have guidelines and rules for user ID formats. User IDs are case sensitive. This is a required field.

- ✔ **Password:** Pick a password that's both easy for you to remember and hard for someone else to guess. This is a required field.

- ✔ **Confirm Password:** Type your password again, just so that WSE can be sure that what you typed in the previous password field is in fact what you think you typed. This is a required field.

- ✔ **First Name:** This is what Mrs. Downey called you, in the third grade, assuming you had Mrs. Downey in the third grade. This is a required field.

- ✔ **Last Name:** Your family name. This is a required field.

- ✔ **E-mail:** This is the e-mail address that your teammates will use, and also that WSE will use. The WSE server may send you e-mail, so it's important that what you enter in the e-mail field is accurate. This is a required field.

- ✔ **Preferred language:** Select the language that WSE will use for the basic user interface and documents.

- ✔ **Preferred regional format:** This field determines how certain fields are displayed, such as currency and dates (do you prefer a dollar $ign, ¥en, or £ pound sign?).

- ✔ **Time zone:** Use this field to select your time zone. What you select as your time zone is used by the WSE server to adjust time fields to match your preference.

- ✔ **Preferred calendar type:** What you select in this field determines how team calendars are laid out.

- ✔ **First day of the week:** This field determines how team calendars are displayed.

- ✔ **First work day of the week:** This field determines which day is used as the beginning of the work week. For example, if your work week starts on Saturdays and ends on Fridays, you can modify your calendar accordingly.

Logging Out

As with any computer system, you should log out when you're finished or when you will be leaving your workstation unattended; you wouldn't want some unauthorized person to walk up to your desk and post documents with your name on them!

When you're done using WSE, click the <u>Log Out</u> link in the upper-right corner of the screen (see Figure 2-4). WSE confirms that you've been logged out, so you can head out to lunch or go home. After logging out, it's prudent to close your browser too, although that isn't absolutely necessary. The <u>Log Out</u> link is on every WSE page, so you can log out no matter what you're doing.

Log Out button
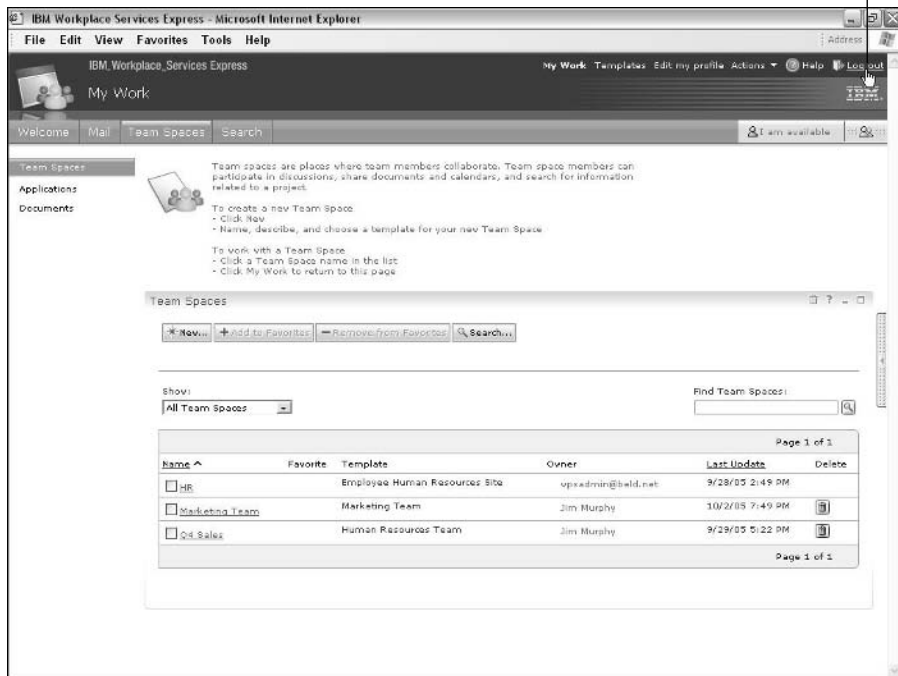
Figure 2-4:
Click the
<u>Log Out</u> link
to end your
WSE
session.

Dealing with the Inevitable Automatic Logout

Figure 2-5 shows what will happen to you eventually. WSE has a built-in feature that automatically logs you out after a certain period of inactivity — usually 30 minutes. This is a good thing because it means WSE will remember to log you out — even if you forget. If you do find that you've been automatically logged out — maybe you took a phone call in the middle of using WSE — you can log in again and pick up right where you left off.

TIP

If you're a WSE administrator, check out Chapter 15 to see how to adjust the amount of time that passes before WSE logs inactive users out.
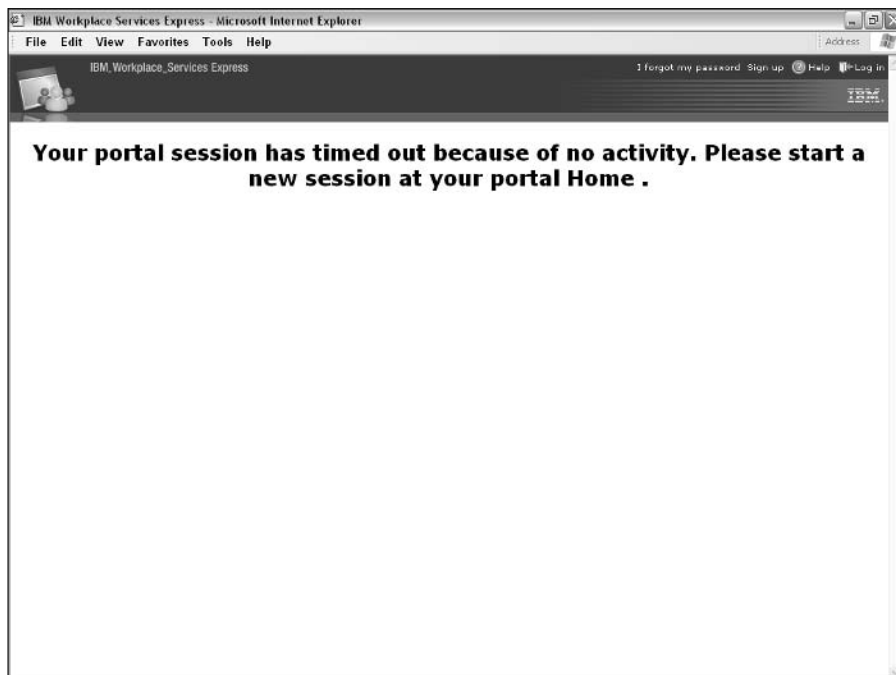
Figure 2-5:
WSE automatically logs you out after a certain period of inactivity.

Your portal session has timed out because of no activity. Please start a new session at your portal Home .

Chapter 3

Getting a Lay of the Land

. . . .

. . . .

*M*uch of the IBM Workplace Services Express interface is the same no matter what the context; the menus, commands, and buttons are in the same place and do the same thing, regardless of the task you happen to be performing. That makes your life easier because after you figure out the basics of how to use WSE, you feel right at home no matter what you're doing.

In this chapter, I show you how to navigate, search, and chat in the IBM Workplace Services Express interface so that you can maximize your productivity.

REMEMBER

As they say in the TV car ads, "actual mileage may vary." That is, the user interface you see when you use WSE at your organization may be a little bit different than what you see in this chapter. But that's okay. All the main functions work exactly the same, so when you have the basics down, you're good to go.

Getting the Big Picture

Figure 3-1 shows a fairly simple WSE Welcome page, which probably looks very much like the Welcome page you see when you log in to your WSE server.

Menus and navigators

Figure 3-1:
Your own
WSE
Welcome
page
probably
looks like
this.
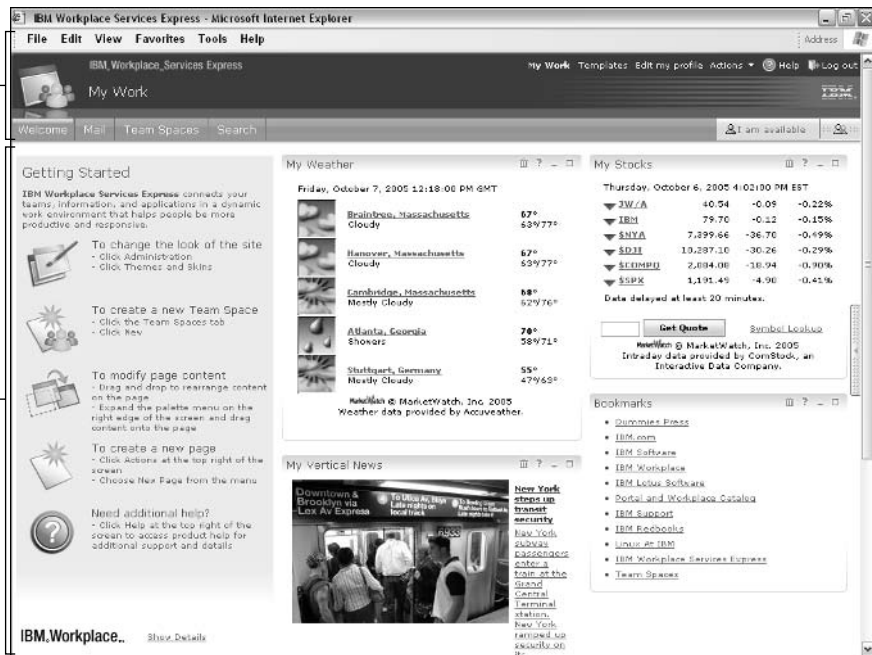
Work area

As you can see, the basic WSE screen is divided into two main parts: the menus and navigators area and the work area. The work area is the biggest part of the screen, and the work area is where most of the action is. In the simplest terms, the buttons and menus toward the top of the screen help you determine what you see in the work area, such as your e-mail, the Welcome page, your team's team space, and so on. Your actual work (your messages and documents that you and team members have posted, and so on) appears in the work area.

Figure 3-1 also shows a couple of important sets of buttons and menus, which I discuss in the following sections.

Meeting the Navigation bar

The Navigation bar, usually located on the upper-left side of the screen, contains the set of buttons you'll use most often to move around the major areas

of WSE. The Navigation bar usually has at least six buttons; however, the Navigation bar that you see when you log in to WSE at your company may very well have more or fewer (the number of buttons you see depends on your company's configuration of the software). In general, you'll see

- ✔ **Welcome:** Click this button to visit the IBM Workplace Services Express home page.
- ✔ **Mail:** If WSE is set up to connect with your company's e-mail and calendar system, clicking this button takes you to your e-mail inbox, and (maybe) your calendar, and (maybe) your personal address book.
- ✔ **Team Spaces:** Team spaces are essential to your WSE experience. Click this button to visit the team spaces for all the teams of which you're a member.
- ✔ **Search:** Click this button to locate information in WSE — documents, milestones, discussion items, and even chat transcripts.
- ✔ **Availability:** Click this button to set your availability in WSE's instant messaging system.
- ✔ **People Palette:** Click this button to search for people, send invitations to chat, and manage your Instant Contacts list.

If you encounter more buttons on your WSE Navigation bar, don't despair; it's pretty common. The powers that may be — like the WSE administrator, for example — may add more pages, for example, or even rename the pages and buttons I describe earlier.

Meeting the toolbar

In the upper-right corner of the screen is the toolbar, which usually includes six buttons:

- ✔ **My Work:** A Home button of sorts, this button transports you from wherever you are to a list of all the document libraries without forcing you to manually backtrack. For example, if you are knee deep in a specific document library but you want to see all your work, the My Work button brings you back to the list of all of the document libraries.
- ✔ **Templates:** Click this button to create and manage the templates that you use when you create and modify forms and team spaces. You may not see this button if you're not authorized to see it.

✓ **Edit My Profile:** Click this button to change settings that control the way WSE works for you. You can change your time zone, the language WSE uses, your password, and more.

✓ **Actions:** Click this button to access a menu that enables you to create and edit pages and/or to manage access rights of your teammates.

✓ **Help:** Click this button for a detailed index of help topics.

✓ **Log Out:** Click this button when you're ready to go home for the day (see Chapter 1).

Getting to Know the Welcome Page

When you first log in to WSE, the work area is taken up by your Welcome page. Your WSE administrator decides, based on your role in the company or in particular projects, what your Welcome page looks like and contains, which explains why your Welcome page may look different than those shown in this book, and why your Welcome page may even look different than your teammates'. The Welcome page is divided up into five distinct areas, known as *portlets*.

REMEMBER

Most of the portlets have control buttons in their upper-right corner. The controls enable you to edit a portlet's content, collapse or expand the portlet, or remove the portlet from view altogether; I discuss the ins and outs of using portlets in Chapter 4.

TIP

In Figure 3-1, the portlets are named Getting Started, My Weather, My Vertical News, My Stocks, and Bookmarks.

Introducing IBM Workplace Services Express and Your E-mail

Because the whole point of IBM Workplace Services Express is to promote your productivity and streamline your team communications, you won't be surprised that WSE can be connected to your company's e-mail system.

WSE comes with special tools (portlets) to connect to Microsoft Exchange, Lotus Domino, or any POP3/IMAP e-mail system. That's another way of saying that WSE works with just about any e-mail program you can name.

REMEMBER

WSE doesn't have an e-mail system of its own. But when and if the time is right, WSE is designed to connect to whatever e-mail system you already have.

TIP

If your WSE has been connected to your e-mail, you won't have a new e-mail address, you won't have a different inbox, and you won't have to do anything different than what you've already been doing.

Understanding why e-mail may not be integrated

If your e-mail isn't integrated into WSE, don't be alarmed. In some situations, e-mail integration isn't appropriate for WSE. If, for example, you log in to a WSE portal at a different company (maybe your supplier hosts a WSE portal for you, or maybe you're a customer who has been invited to join a team space by one of your suppliers), it's unlikely that your e-mail is included in that other company's portal. Or if your company has given you special software to read your e-mail, such as Microsoft Outlook or Lotus Notes, your administrator probably wants you to continue to use that software for e-mail, and may consequently remove the Mail tab from WSE altogether.

Using your e-mail with IBM Workplace Services Express

If your WSE has been set up to work with your e-mail, you can find it by clicking the Mail button on the Navigation bar. What you see when you click the Mail button depends, of course, on how WSE has been set up and what e-mail system your company uses. Figure 3-2 gives you an idea of what your e-mail interface looks like if your company uses Lotus Domino with IBM Workplace Services Express.

REMEMBER

This is the same old inbox you've always had for your e-mail; you don't have to figure out anything new or different in order to send and receive e-mail messages.
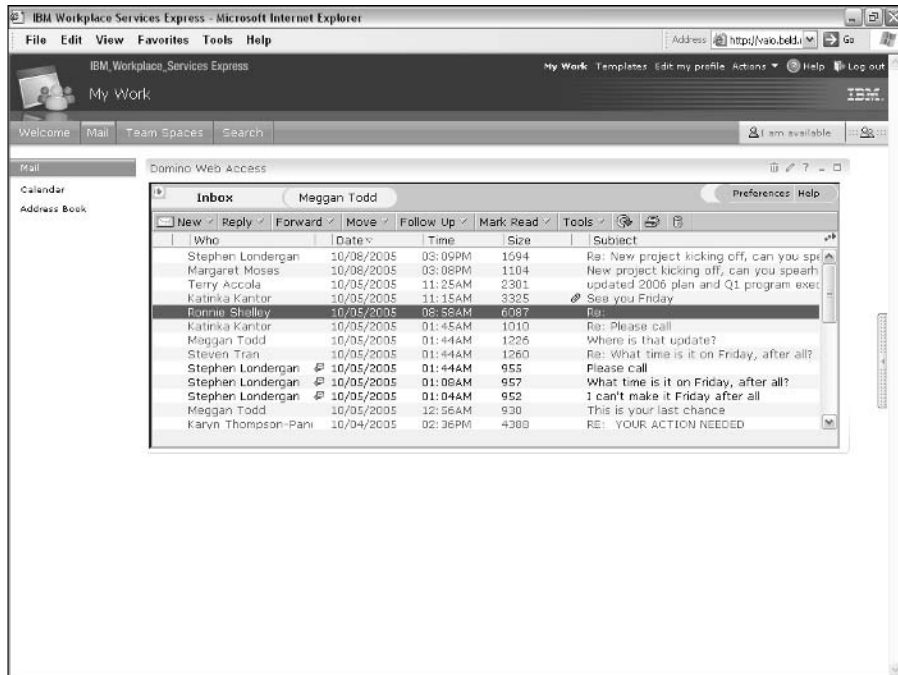
Figure 3-2:
WSE can
hook up
with your
existing
e-mail
system.

Finding Out about the Search Button

IBM Workplace Services Express includes built-in search functions that you can use to find documents, information, and people. In fact, you're likely to encounter many different ways to search for stuff in WSE. However, the Search button on the Navigation bar offers the most comprehensive search options in one place.

As Figure 3-3 illustrates, clicking the Search button on the Navigation bar enables you to find all kinds of information. You choose where, exactly, WSE looks for the information you seek. You can use the Applications, Documents, or Team Spaces tab to specify the scope of the search. Chapter 15 has all you'll ever need to know about searching in WSE.

The difference between the Navigation bar's Search button and any others you encounter is the scope; the Navigation bar's Search button offers the widest possible scope because it searches all of WSE.

Figure 3-3:
WSE
includes a
built-in
search
facility that
you can use
to find any
document
or piece of
information.
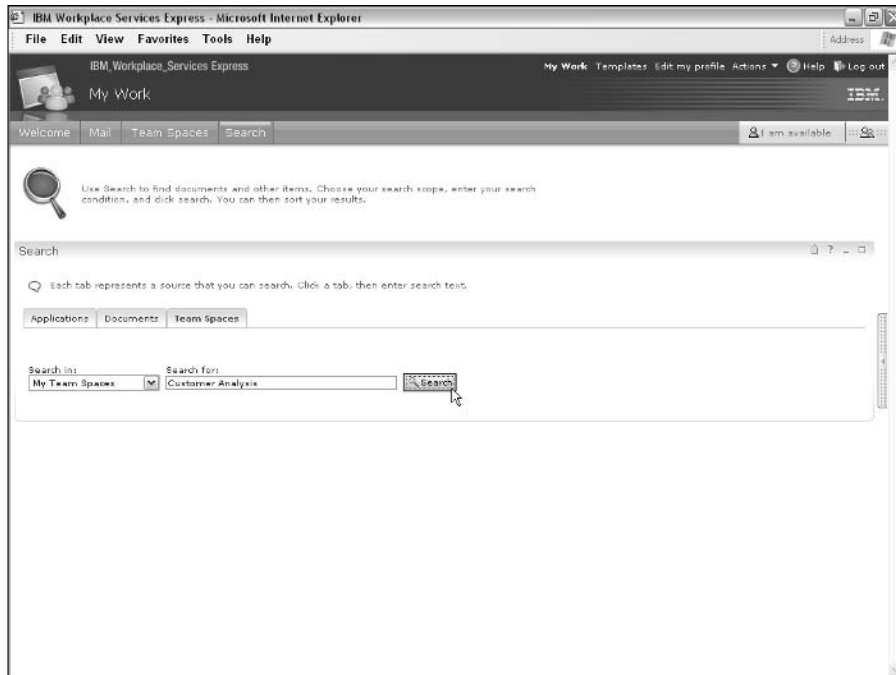
Introducing IM Availability
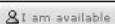
One of the most innovative and useful aspects of IBM Workplace Services Express is that *instant messaging* (IM) is built in to the product, and the IM feature is available all over the place. As you see in Chapter 5, any time you encounter a person's name, say in your buddy list, document libraries, the list of team space owners, and so on, you can usually initiate a chat with the person by clicking his or her name.

The Presence indicator identifies whether a person is interested in talking. The four designations are

- Available
- Away
- Do Not Disturb
- Logged Out

TIP

At any time, users can change their Presence based on their individual needs.

Keeping in Touch with Your Team with the People Palette

Click the People button whenever you need to interact with the members of your team. When you click the People button, the People Palette slides out, as you can see in Figure 3-4. You use the People Palette to do three distinct things: find people, exchange instant messages with them, and manage your Instant Contacts/Buddy List.

People button

Figure 3-4:
Use the People Palette to work with the people on your team.

People Palette
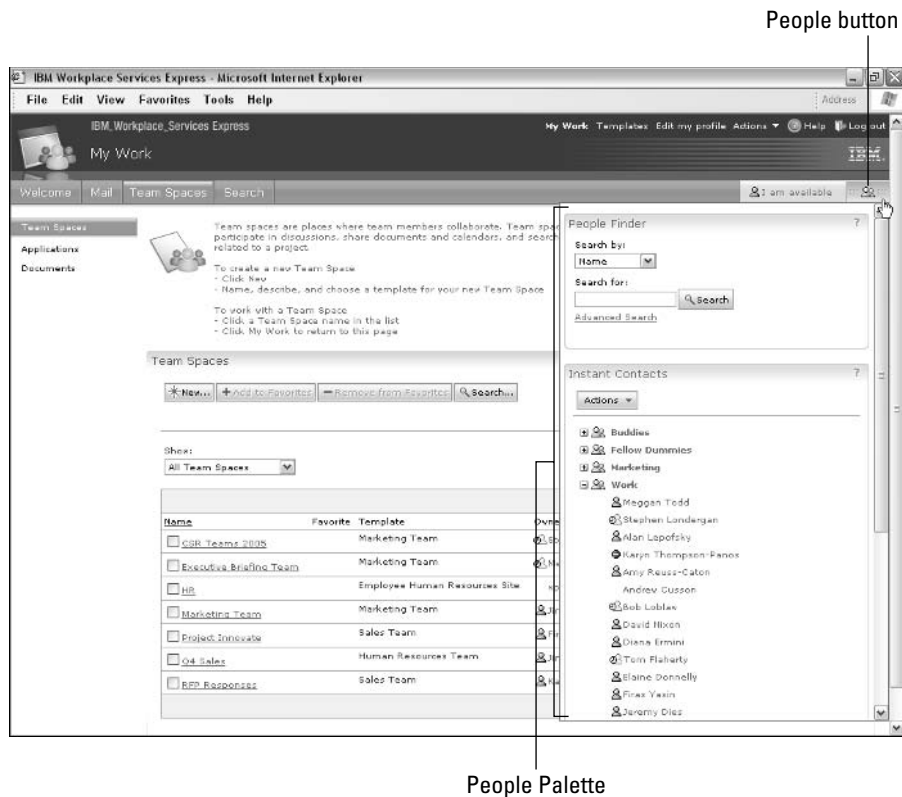
Using Page Menus

At the risk of jumping the gun a bit, take a look at Figure 3-5, which happens to show the Documents page in a team space.

What's important to notice in Figure 3-5 is the array of buttons on the left: Marketing Team Home, Schedule, Documents, Discussions, and Search. As you can see in the figure, Documents is selected and highlighted to indicate that it is the page currently being viewed.

TIP

The point here, dear reader, is not so much about the particular buttons in that list, or to explain the ins and outs of a document library. Rather, the point is that some WSE pages have menus and buttons of their own. These menus and buttons are usually listed on the left side of the screen. Just click a button in a WSE page's menu to open the page or access the function.
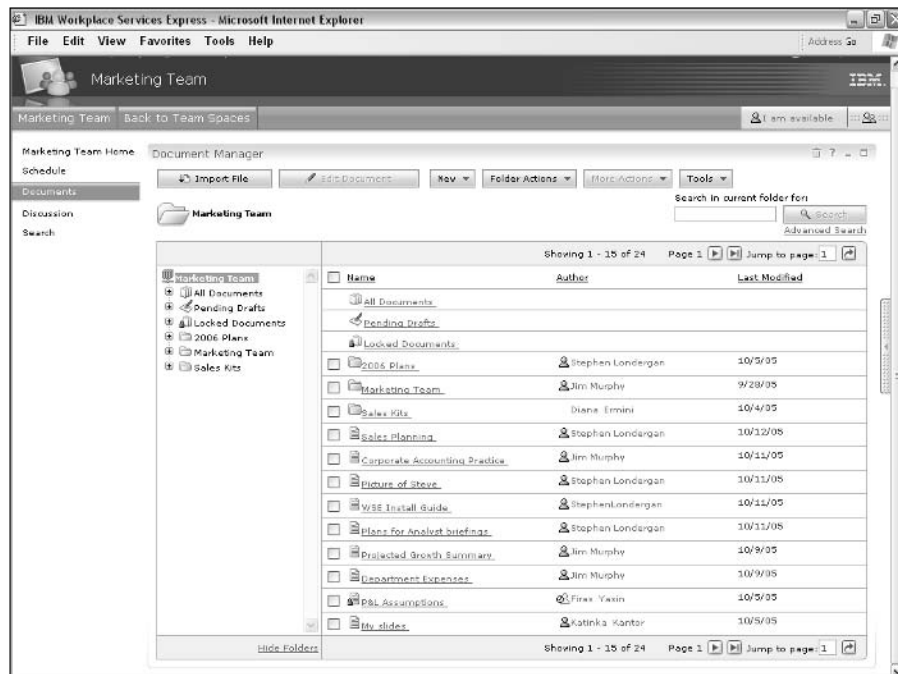
Figure 3-5: Some WSE pages have menus of their own, with buttons on the left side of the screen.

Handling Themes 'n' Such

The overall look and feel of WSE is controlled by WSE's *skins* and *themes,* as I show you in Chapter 15. Even if you're not personally in a position to change the way WSE looks by working directly with its skins and themes, you may notice that your WSE looks different than WSE looks in this book, or you may notice that the way WSE looks at your company on Monday is different than it looked on the previous Friday. If that happens, your administrator probably changed the skin or theme over the weekend.

Figure 3-6, for example, shows WSE using a different theme and skin. In this case, the default gray and orange theme has been shifted to a lovely shade of blue. There are pretty stars at the top, and you may notice a few buttons are in different places.
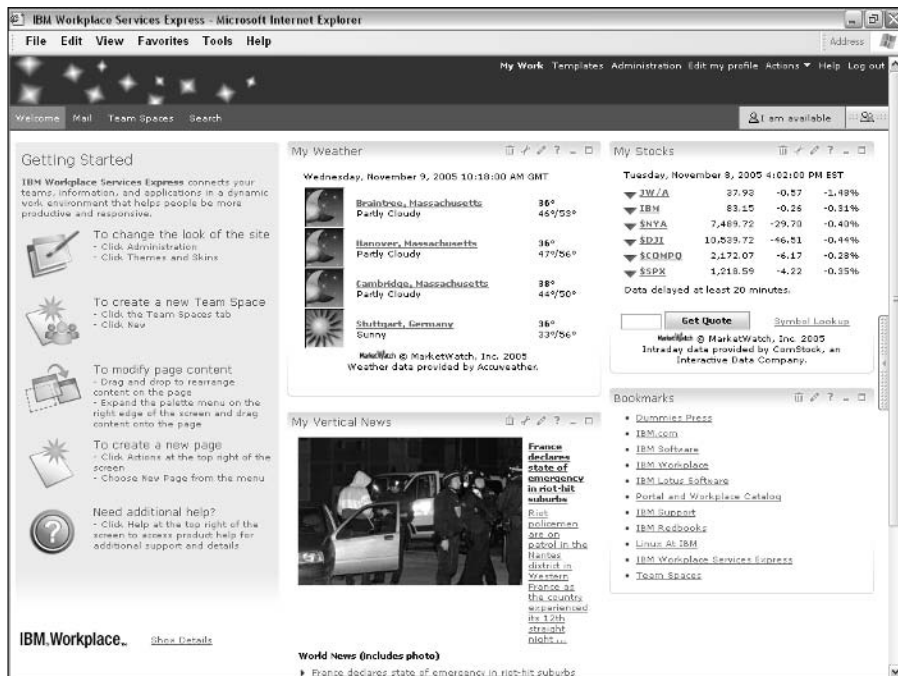
Figure 3-6: WSE skins and themes make WSE look different.

Part II
Making Use of the Main Features

The 5th Wave   By Rich Tennant
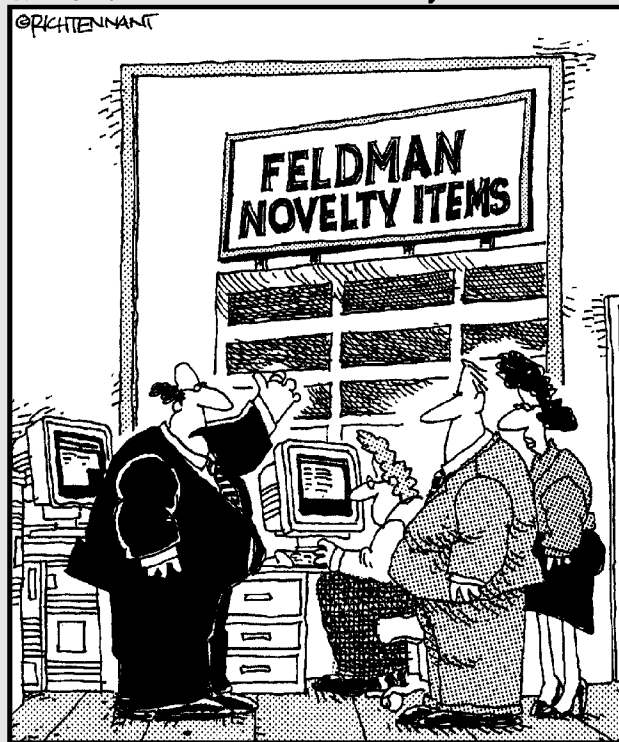
"We can monitor our entire operation from one central location. We know what the 'Wax Lips' people are doing; we know what the 'Whoopee Cushion' people are doing; we know what the 'Fly-in-the-Ice Cube' people are doing. But we don't know what the 'Plastic Vomit' people are doing. We don't want to know what the 'Plastic Vomit' people are doing."

In this part . . .

*W*hen you know what WSE is (and isn't), and when you can toss around words like *team space* and *integrated instant messaging* with abandon, you're ready to log in and read about the the two features that you see each and every time you use WSE.

The chapters in Part II explain how you use the WSE Welcome page, and (more important, we daresay) how you use WSE's built-in People Finder and instant messaging system.

Chapter 4

This Is Your Welcome Page, and It Was Built Just for You

● ●

In This Chapter

▶ Discovering the default Welcome page

▶ Finding out how portlets work

▶ Using and configuring the MarketWatch portlets

● ●

*P*ages, pages, everywhere. The most important page you use in IBM Workplace Services Express is your Welcome page because that's the first place you find yourself every time you log in to WSE.

Chapter 4 is all about using WSE pages in general, and using your Welcome page in particular. It also takes you through the ins and outs of how portlets and pages fit together.

Getting to Know the Welcome Page

When you first log in to WSE, the work area is taken up by your Welcome page. Your WSE administrator decides, based on your role in the company or your role in particular projects, what your home page looks like and contains, and you may be able to alter its contents yourself. That explains why your Welcome page may look different than those shown in this book, and why your Welcome page may look different than your teammates'.

The Welcome page shown in Figure 4-1 is the default Welcome page you see *out of the box,* as they say (not that software is sold in boxes anymore).

This prebuilt and ready-to-go Welcome page embodies, in a lot of ways, what makes WSE cool. When you buy WSE, you get a Welcome page like this one that's fully functional, and that you (this is the important part) didn't have to create, build, or buy on your own. WSE is designed to get you up and running very quickly, which you definitely can do, because you don't have to worry about creating your own Welcome page.

Column 1   Column 2   Column 3
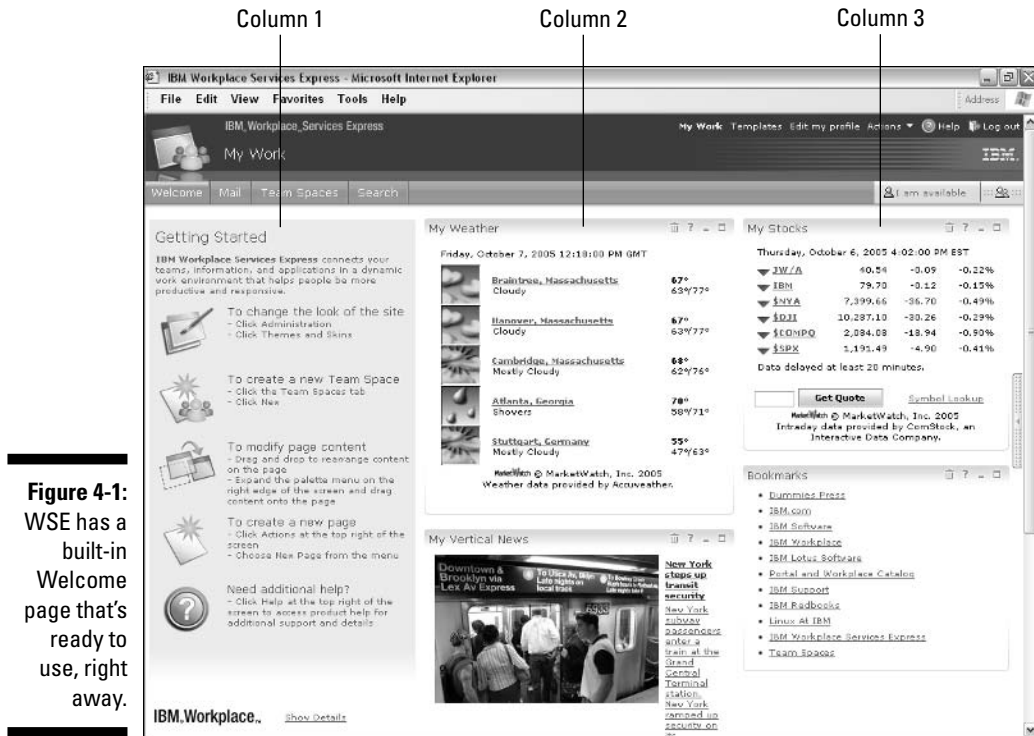
Figure 4-1:
WSE has a
built-in
Welcome
page that's
ready to
use, right
away.

About WSE Pages, in General

WSE pages come in many sizes, colors, purposes, and guises. Some WSE pages are fairly staid, such as the Help screens, or perhaps the page you see when WSE has automatically logged you out. Other pages (the Welcome page is a good example) are much more dynamic, because their contents change based on your role, the time of the day, what's happening in the stock market, or maybe what new documents you and your teammates have posted.

The most exciting WSE pages are the ones that are collaborative in nature; for example, the home page in a team space is chock full of information about the team or project, as you see in Chapter 6.

A team space is actually a collection of pages related to a particular project or team, and a team space for one team may have many pages, while another page may have few. Most of the pages you use in WSE are built by IBM and included with the product. That means that finding your way around one

page pretty much ensures you know your way around all of them. That said, sometimes you use home-grown pages — created by you or someone at your company. Chapter 7 discusses how you build and assemble your own pages.

REMEMBER

Just because you *can* create a page from scratch doesn't mean that you *should.* Customizing an existing page to suit your own particular needs is usually preferable to creating a brand-new one.

Making Your Way through Page Columns

Most pages are divided into columns. For example, the default Welcome page that figures so prominently in Figure 4-1 is actually made up of three columns; the first has the Getting Started box, the second contains information about the weather forecast and news, and the third has information about the stock market and some Web page links.

Other pages have fewer columns, such as the one shown in Figure 4-2.

Figure 4-2: This document library page shows content in one big column.

In this example, the page has two columns; one on the left for the Team Spaces, Applications, and Documents buttons, and then a much wider column on the right that contains, on this sample page anyway, a catalog of document libraries.

Day in and day out, it may not be that important to you whether a given page is divided into columns. In fact, you may not even have noticed that pages are divided into columns if you hadn't read all about it right here. But as you see in the following section, the basic layout of a page — its foundation, so to speak — *is* important if you need to add or remove portlets from a page, or move a portlet from one part of a page to another.

TIP

You can use your browser to create a bookmark or favorite for any part of WSE that you find yourself visiting on a regular basis.

Discovering Portlets

Any page that's interactive in any way includes one or more *portlets*. A portlet is actually a small computer program, written in Java. Some pages contain multiple portlets that display information or are used to interact in some way with a team space, document, library, or application.

TECHNICAL STUFF

You could use WSE all day long without ever knowing what a portlet is or what Java is, and that's half the point. WSE provides you with collaborative team spaces and tools and all kinds of cool things like that, and now you know that a lot of those cool things are, in computer terms, called portlets.

Understanding where portlets come from

Ninety-five percent (give or take) of the portlets that you encounter in WSE are built in with the software from IBM. Just about everything you see on the default WSE Welcome page, for example, is actually a portlet, as are the tools you use to manage a team space member list, view the documents in a document library, exchange instant messages with your colleagues, view your inbox, and on and on.

There is also a special bunch of WSE portlets, called *form portlets*. These special portlets are important to your use of WSE, and some of them get used in just about every team space. Figure 4-3 shows the Marketing Announcements, Members, and Links portlets, which have been collected in a page in a team space.

Figure 4-3:
WSE
includes
built-in
collaborative
form
portlets.
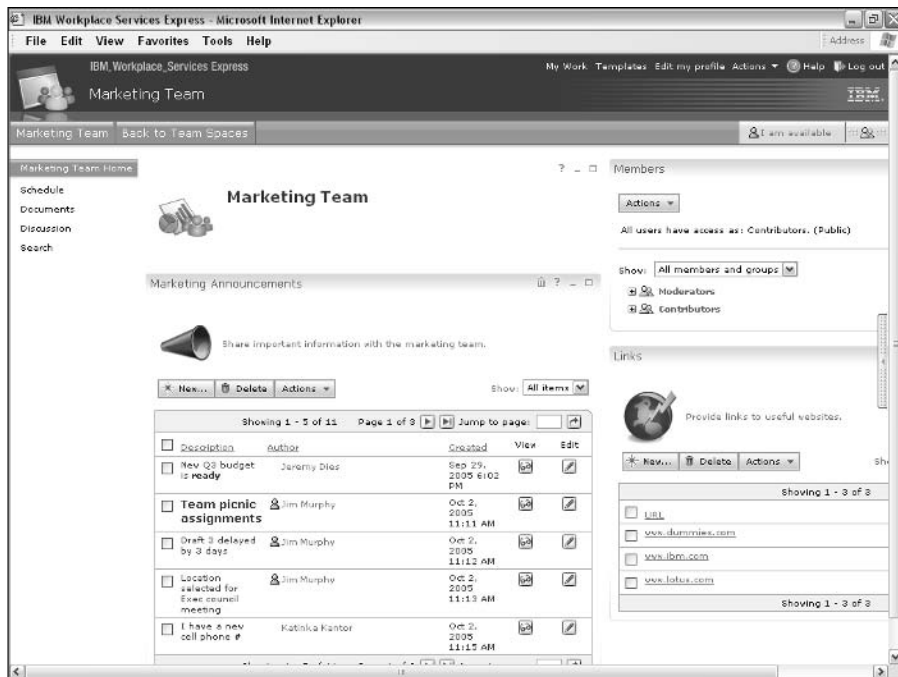
Understanding why portlets are so cool

Portlets are so special for a few reasons:

- ✔ They come with WSE, which means you don't have to create, build, or buy them.

- ✔ They're all designed to be very collaborative in nature; the good folks at IBM have built portlets to handle the most common collaborative activities. For example, these form portlets can be used as-is, or modified to suit a particular project or team, as discussed in Chapter 13. Form portlets aren't just about providing information (such as the info provided by the Weather portlet). Rather, they help people work together. You can track vacation schedules, collect and graph survey results, and more.

- ✔ You can make your own portlets. If you're wont to do so, you can roll up your sleeves, do a little Java development, and then use the portlet you create with WSE.

✔ You can download portlets for use with WSE; some downloadable portlets are free and some cost some money. There are a ton of portlets available, from both IBM and its business partners. If you visit the IBM Workplace Solutions Catalog (point your browser to `http://catalog.lotus.com/wps/portal/workplace`) and can't find a portlet to suit your fancy, you can find a business partner or consultant who'd be happy to help you, for a (no doubt) very reasonable fee.

Working with portlets

The portlets in WSE function much the same way application and document windows do in Microsoft Office and/or your favorite version of Linux GUI.

As you can see in the My Vertical News portlet shown in Figure 4-4, portlets have an array of small buttons that are used to control the size and/or content of the portlet.

Figure 4-4:
Every portlet has buttons that you use to control the portlet's size and contents.

How much control you have over any one portlet is determined by your access level, so don't be surprised if some portlets you encounter don't have all the buttons shown in this list:

✔ **Delete:** This button removes the portlet from the page altogether.

✔ **Configure:** This button determines how the portlet functions.

✔ **Edit:** This button usually changes or affects the portlet's contents.

✔ **Help:** This button provides information about how the particular portlet works.

✔ **Minimize:** This button collapses the portlet so that only its title is visible.

✔ **Maximize:** This button makes the portlet fill the entire Web browser window, and hides most everything else.

Figure 4-5 shows a WSE Welcome page with the My Weather and Bookmarks portlets minimized.

Minimizing portlets and maximizing portlets is really only worth the trouble if you're working with WSE pages that are so packed with information that you can't see it all; this situation probably won't occur as often as you may think.

These portlets have been minimized.

Figure 4-5:
Minimize and maximize portlets to control how much you do (or don't) see.
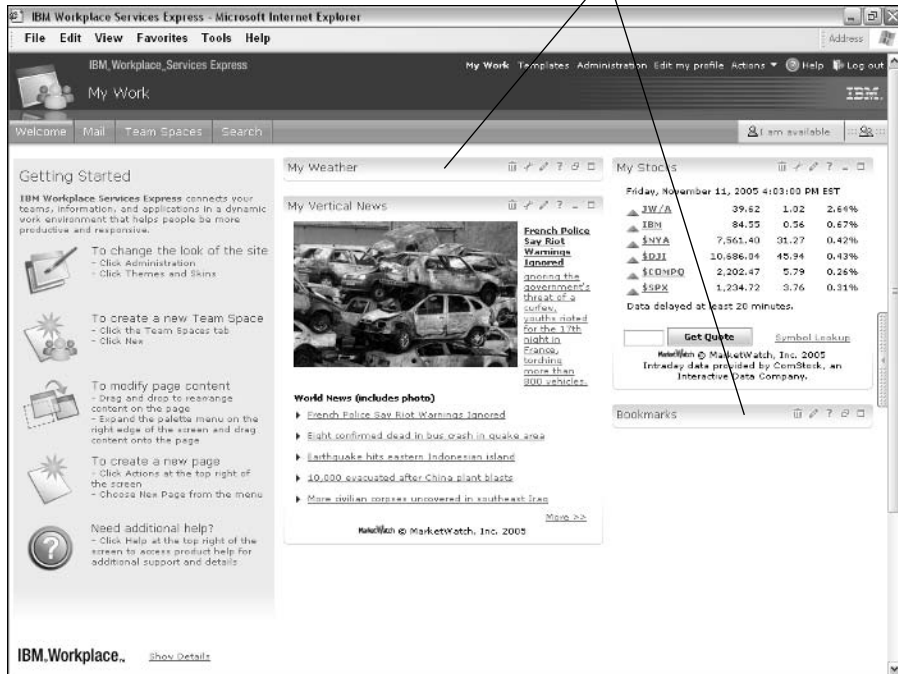
Those minimize and maximize controls come in handy, however, if you want to print content from one, but not all, the portlets on a page. In other words, you can minimize all the portlets except the one whose contents you want to print, or, better yet, maximize the portlet you want to print so that it fills the work area.

✓ **Restore:** This button reduces a maximized portlet to its previous state.

Moving portlets

Depending on your access level, you may be able to move portlets on a page. If you'd prefer, for example, to have the My Weather portlet on the left instead of the middle of your Welcome page, you can click and drag it to a new location.

Use the following steps to move a portlet:

1. **Position the mouse over the title bar of the portlet you want to move.**

   The mouse cursor changes to a four-headed arrow, officially called a Move cursor.

2. **Hold down the left mouse button to grab the portlet.**

   The mouse cursor changes to a hand and the portlet's contents dim.

3. **Drag and drop the portlet to its new location.**

   If the page has other portlets on it (as the Welcome page does), WSE shows a big orange bar to indicate that dropping the portlet there moves the existing portlet farther down on the page. For example, letting go of the mouse as shown in Figure 4-6 moves the My Weather portlet to the top of the second column on the page, and pushes the My News portlet down, to make room for it.

Whether you realize it or not, this drag-and-drop business is a big deal. If WSE didn't let you drag and drop portlets with your mouse, you'd be in a world of hurt, and up to your eyeballs in things like Java development, DHTML, and Cascading Style Sheets every time you wanted to move the parts of your pages around.

Adding portlets to a page

Depending on your access level, you also may be able to add new portlets to a page. For example, say you just created a new team space, and you want to add a different form portlet to the team's home page. Adding a new portlet to a page is easy.
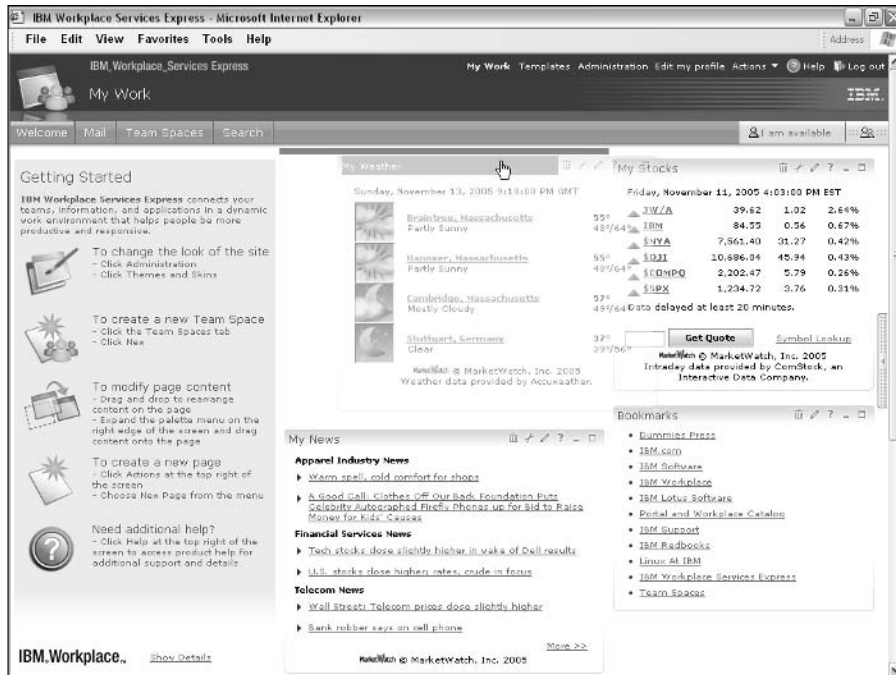
Figure 4-6:
Drag and
drop
portlets
anywhere
on a page.

Use these steps to add a new portlet to a page:

1. **Click the Portlet Palette button to maximize the list of available portlets.**

   The Portlet Palette slides out, as shown in Figure 4-7. (Come on, admit it; it's cool.)

2. **Scroll through the list to find the portlet you want to add to the page.**

   If you want to add a portlet that's not in the list, scroll through the list and select Add.

3. **Drag and drop the portlet to its new location on the page.**

   When you move the mouse over the portlet's icon, the mouse cursor changes to a four-headed arrow. When you're satisfied with the portlet's new location, let go of the left mouse button.

Depending on the portlet you choose, you may have to configure it before it is ready to use.
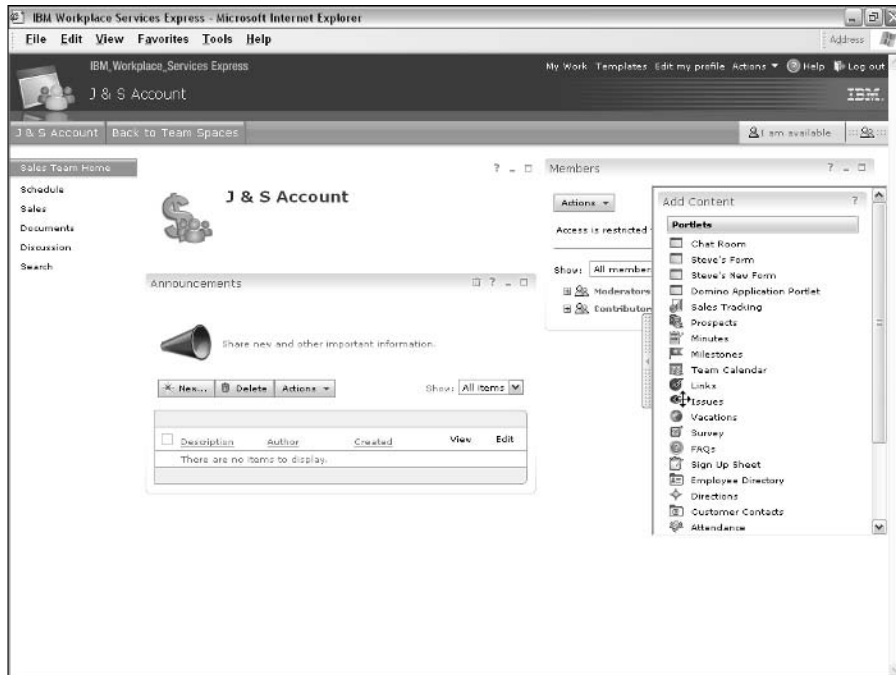
Figure 4-7:
Adding a
new portlet
to a page.

Although WSE makes using and managing portlets — and even adding new portlets to a page — easy, you may have noticed that I've made no mention of how you *create* portlets. That's no mistaken omission; WSE has tools for assembling collaborative applications (that's what you're doing when you add a portlet to a page, believe it or not), but WSE is *not* for creating portlets. If you're a Java developer, this means you can develop your portlet in a Java environment. (May I suggest an IBM product such as Rational Application Developer?) When you complete you masterpiece, you can then use it on a WSE page, team space, or what have you.

Working with the MarketWatch Portlets

WSE includes a few portlets, in addition to the collaborative ones described in the previous sections. These other portlets are provided by a company called MarketWatch, and although they're not free — you have to pay to use them — MarketWatch lets you try them out for 30 days at no charge.

Three of these portlets (My Weather, My Vertical News, and My Stocks) are automatically part of the WSE Welcome page, as you can see in Figure 4-1; there are a couple of others you can use, too.

Forecasting My Weather

You can edit the My Weather portlet to add cities that are more interesting to you — your hometown, or perhaps your next vacation destination.

Use these steps to edit the contents of the My Weather portlet:

1. **Click the Edit icon in the upper-right corner of the My Weather portlet.**

   The My Weather form appears.

2. **Enter the name of the city (or a zip code) in the Add a City field; click Add.**

   You can enter as much or as little of the city and state (or city and country) as you know; WSE prompts you to make a choice if more than one city matches your criteria.

3. **To change the order in which the cities are listed, select the city you want to move in the My Cities list and click the Up and Down links to move it.**

   You can also use the Delete link to remove a city.

4. **Determine whether temperatures should be displayed in Celsius or Fahrenheit.**

   Simply click the radio button that corresponds with your desired temperature scale.

5. **Click OK.**

   Figure 4-8 shows the My Weather form.

Getting caught up with My Vertical News

The My Vertical News portlet gives you headlines and links to news stories based on the topics you select. Some of the available news topics also include an image or photograph, which, if nothing else, livens up your Welcome page.
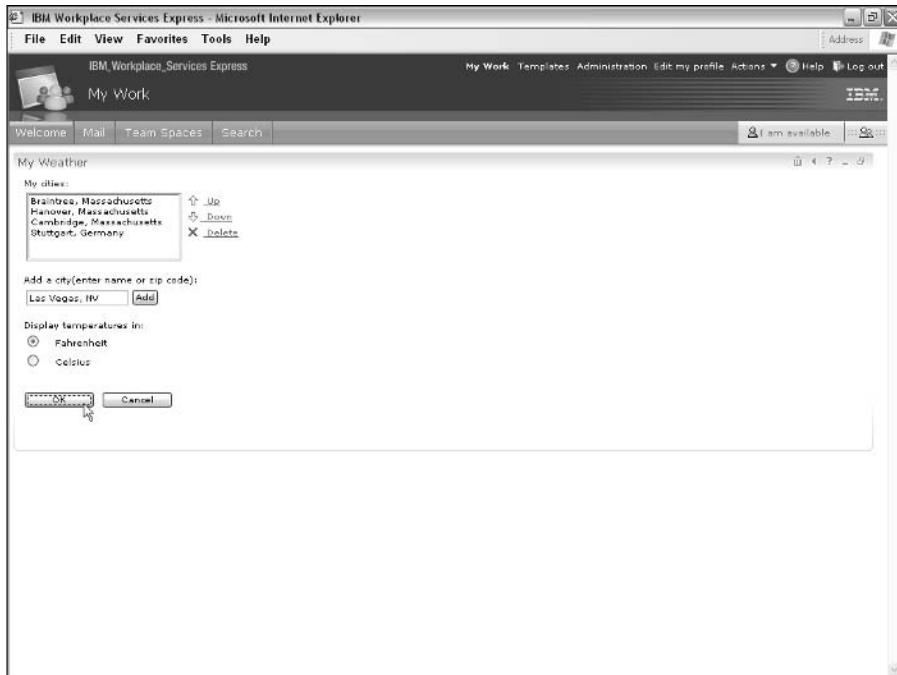
Figure 4-8:
You can add
your own
cities to the
My Weather
portlet.

TIP

You can control the size of the image that's displayed by clicking the portlet's Configure control.

You control the topics of the stories that are displayed to match your own personal interests; simply click the My Vertical News portlet's Edit control and use the News Categories form.

As you can see in Figure 4-9, the News Categories form has a long list of news categories, listed on the left; the Your Normal Selections column on the right represents which topics are displayed (and regularly updated) on your Welcome page.

If you see a topic that grabs your fancy, and you want to add it to your Welcome page, select it and click the right arrow button to move the topic to the Your Normal Selections column on the right. You can Shift-click to select items in sequence or Ctrl-click to select out-of-sequence items. To reorder the topics on your home page, select the topic you want to move in the Your Normal Selections column, and then click the Up and Down links to move it. The higher an item appears on the Your Normal Selections list, the closer it is to the top of the My Vertical News portlet.
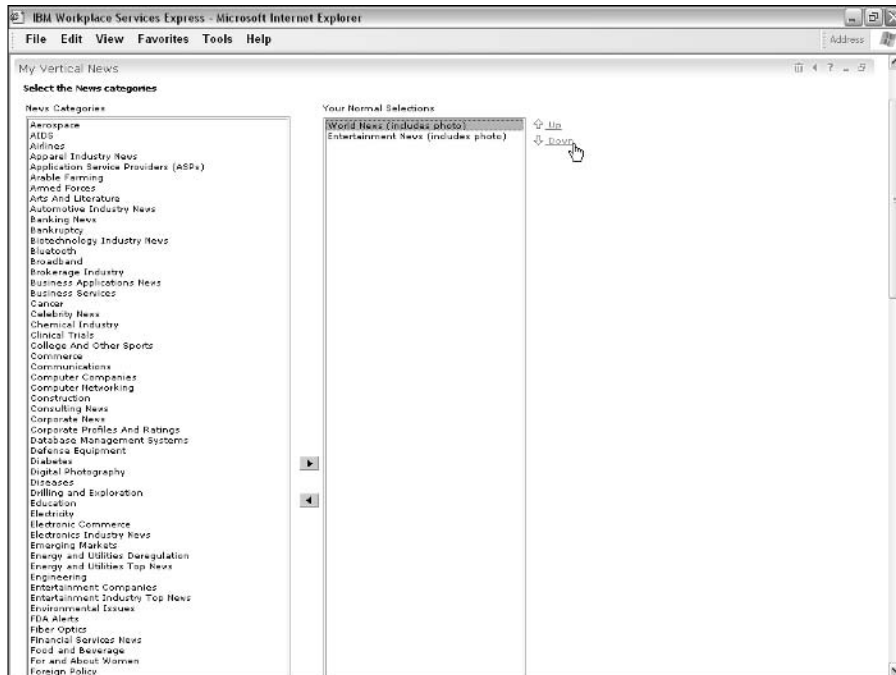
Figure 4-9:
The My
Vertical
News
portlet
keeps you
up to date
with a
variety of
topics.

Here are some other items you find on the News Categories form:

✓ **Your Additional Maximized Selections:** Scroll to the bottom of the
News Categories form to find this column on the right side of the screen.
You can add news topics to this column too, but these topics only show
up on your Welcome page if you maximize the My Vertical News portlet.

✓ **With Leading Photo:** At the very bottom of the News Categories form,
you find the With Leading Photo radio button; click Yes to include a photo
on your Welcome page. Not all of the news topics available in the News
Categories column include photos, so if you really, really want a photo on
your Welcome page, make sure to select a category that includes a photo,
such as *U.S. News,* which specifies that it includes photos.

✓ **Number of Headlines Per Topic (Normal):** This field enables you to
specify how many news items are displayed for the categories you
choose for your Welcome page.

Resist the urge to pick too many categories or select too many head-
lines; your Welcome page is liable to be so full of news stories that it
won't be much use for anything else.

✓ **Number of Headlines per Topic (Maximized):** This field determines
how much news is displayed if and when you maximize the My Vertical
News portlet.

Click the OK button when you're finished selecting the news categories for your Welcome page.

Taking care of My Stocks

The My Stocks portlet keeps you on top of your (no doubt) significant Wall Street investments. As you can see in Figure 4-10, you can click the name of any of the stocks or indices in the My Stocks portlet to see details about that particular commodity; click the Summary button to return to the summary list of stocks.

Figure 4-10:
The My Stocks portlet can also provide details about a particular stock or index.

Click here to return to Summary view.

When you need a quote on a particular stock that's not included in your portfolio, enter the name of the stock in the stock field and click the Get Quote button. (You can also use the Symbol Lookup link if you're not sure what a company's stock ticker symbol is.)

Use these steps to manage the stocks that are listed in the My Stocks portlet:

1. **Click the portlet's Edit control.**

   The My Stocks form appears.

2. **Enter the name of the stock you want to track in the Add a Symbol field and click the Add button.**

   Your stock gets added to the list.

3. **If you want to reorder a stock, select the stock in the list and use the Up and Down links until you're satisfied with the order.**

   Use the Delete link to remove a stock.

4. **If you want to track an index or indices, select them from the indices list.**

5. **When you're satisfied, click OK.**

Staying on top of My News

The My News portlet is similar to the My Vertical News portlet, but it's smaller and contains topics related to particular industries. Because the My News portlet is not included on the WSE Welcome page by default, you need to add the portlet to the Welcome page if you want to use it.

Use these steps to add the My News portlet:

1. **Click the Portlet Palette.**

   The list of available portlets appears.

   You won't find the My News portlet in this list.

2. **Scroll down the list and select Add.**

   The Add Content form appears.

3. **Enter** news **in the Title Contains field and click the Search button.**

   WSE displays all of the available portlets that match your search term.

4. **Click the Select box next to My News and click OK.**

   The My News portlet is added to the list of portlets.

5. **Drag the portlet from the list onto your Welcome page.**

   Figure 4-11 shows the My News portlet.

You can control the way the My News portlet is displayed and the topics it presents by following these steps:

1. **Click the portlet's Edit control.**

   The My News form appears.

2. **Select the topics you want from the News Categories column on the left. Click the right arrow button to add them to the columns on the right.**

   You can Shift-click to select items in sequence or Ctrl-click to select out-of-sequence items.

   The top column represents the topics that are displayed when the portlet is normal-sized; the topics you add to the bottom column only display if and when you maximize the My News portlet.

3. **Use the With Leading Photo field to determine whether or not the My News portlet shows a picture.**

   Not all the news categories include photos.

4. **Use the last two fields to determine how many headlines are displayed.**

5. When you're done, click OK.

WSE displays your Welcome page, and adds the topic(s) you selected to the My News portlet. Whenever there's a breaking story related to the topics you choose, you'll be in the loop.

Working with CT News portlets

WSE also includes a number of *company tracker* (CT) portlets from MarketWatch; just like the rest of the MarketWatch portlets, they're only free for the first 30 days.

The company tracker portlets provide different kinds of information, related to the companies and industries you choose; for example, the CT Profile portlet displays *profile data* (address of record, executive staff, competitors, and so on).

Like the My News portlet, the CT portlets aren't included in the Welcome page by default, so you have to add them to use them.

Use these steps to add a company tracker portlet:

1. Click the Portlet Palette.

The list of available portlets appears.

2. Scroll down the list and select Add.

Company tracker portlets aren't included in this list by default.

The Add Content form appears.

3. Enter ct **in the Title Contains field and click the Search button.**

WSE displays all of the available portlets that match your Search term.

4. Click the Select box next to whichever company tracker portlet you want; click OK.

The portlet is added to the list of portlets.

5. Drag and drop the portlet from the list onto your Welcome page.

All the company tracker portlets work similarly; you can edit them after you add them to a page to specify which company or companies you want the portlet to track. For example, Figure 4-12 shows profile and stock performance information for a large and well-known computer company.

Figure 4-12:
The
company
tracker
portlets
provide
information
about
whichever
company
you want.
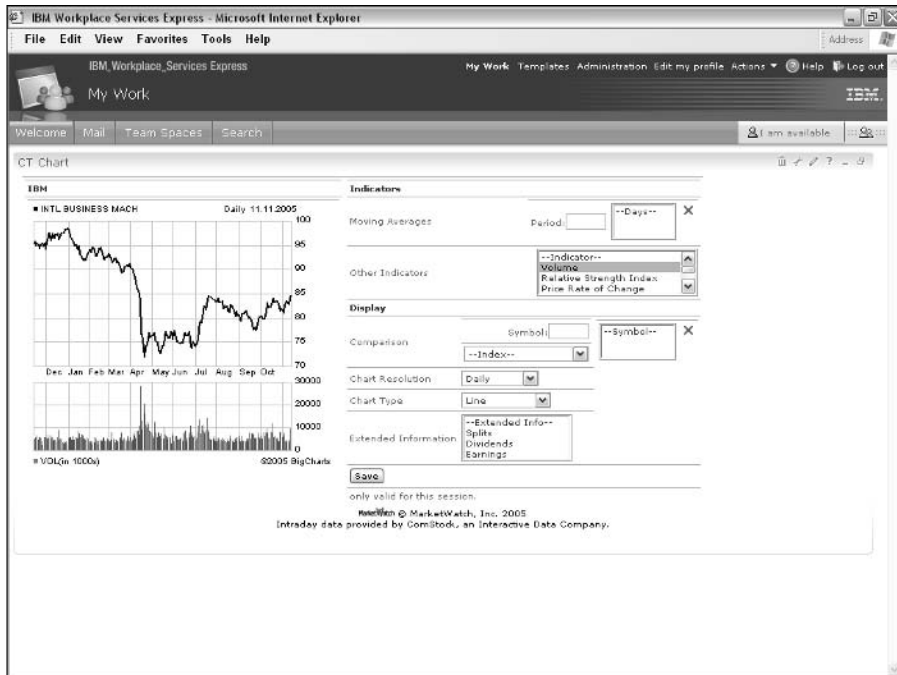
Chapter 5

Keeping in Touch with the People Palette

*N*ot to sound like the guy at the front of the room at some new-age self-help seminar, but I'm here to say that people are the most important part of any team or project. (Okay, group hug, everyone . . .)

IBM Workplace Services Express puts the members of a team front and center; as you see in this chapter, WSE thrives with team-related functions, offering some pretty cool and compelling ways to use technology to enable teams to interact. Without people, WSE would just be another place to dump documents, and it certainly ain't that.

In this chapter, I show you how to find and interact with the people on your team, and how to decide whether and when they can interact with you.

Introducing IM in General

Instant messaging (IM) will change your life, or maybe it already has. Do you remember the day you first started using e-mail? Or better yet, can you imagine doing your job today, without e-mail? Instant messaging has as momentous an effect on how you do your job as the e-mail revolution had. After you start using it (if you aren't already addicted), you won't be able to imagine how you ever did your job without it.

IM has grown up, in a lot of ways. When I met with CIOs, say, five years ago, any IM discussion always began with why IM was more than just a passing fad for teenagers, and why IM has real value for use in business.

Although IM has moved beyond justifying its existence as a way to reduce travel expenses, reduce phone tag, and streamline communication, some businesses still aren't using IM to their full advantage. Teams operate more efficiently, meet their goals quicker, and just plain get things done faster when they can use IM to communicate.

If you ever used a program like Lotus Sametime, or one of the public IM systems like AOL Instant Messenger (AIM) or Yahoo! Messenger, you know the drill; IM is a way to communicate, in real time, with someone using computer technology and the Internet. You use the Chat dialog box to send, read, and exchange instant messages, as shown in Figure 5-1.

There are two important things to know about IM as it relates to WSE:

✔ **IM is built right in to WSE.** WSE includes a built-in contacts list, and has all the tools you need to interact and chat with your team in real time. You can chat with one person or many, without having to stop what you're doing to switch to a different program to see your list of contacts.
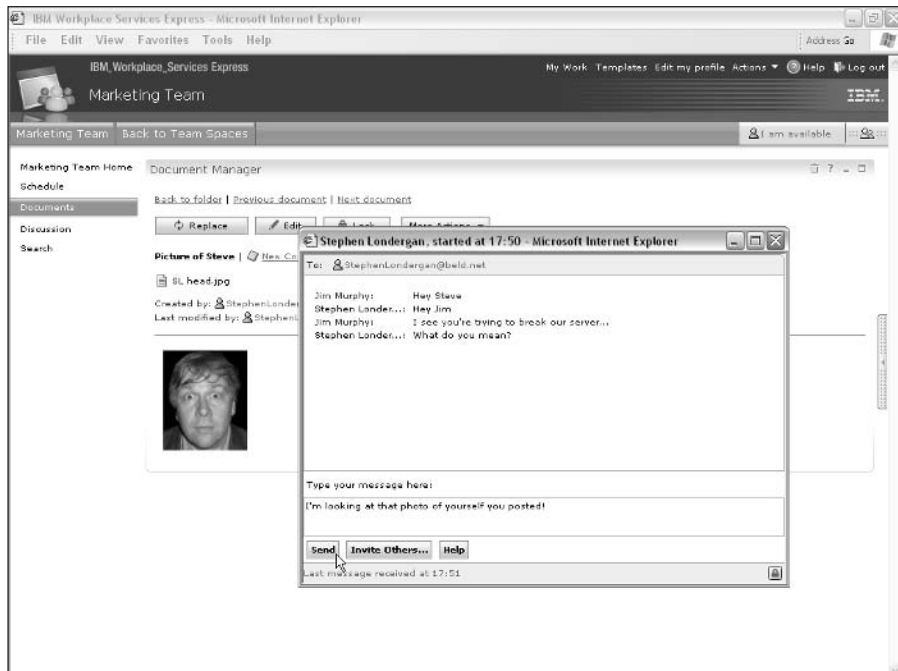
Figure 5-1: Instant messaging is built in to WSE.

REMEMBER

If you think I'm bragging that having IM functions built in makes it easier to use, you're right, but the benefits stretch beyond mere convenience. Having a built-in IM program also means your company doesn't have to shell out any additional cash to purchase or license an external IM system.

✔ **As Jeremy Dies (world-recognized IM expert) once put it, WSE helps you "think beyond the buddy list."** WSE affords many different opportunities and contexts to work together in real time, whether you use the built-in contacts list or not. If you want to ask someone (perhaps the author of a document you're reading in a WSE document library) a question, WSE makes that easy, even if you've never met the person before and have no reason to include him or her in your list of contacts (called the Instant Contacts list). One of the coolest features WSE sports is a chat room (see Chapter 9), which is based on the IM program.

TIP

The bottom line is that saying that IM functions are built in to WSE is an understatement. IM is ubiquitous in WSE. You can IM coworkers, teammates, and anyone else in your company without even trying, because you always know an employee's online status and availability. Any time you encounter a person's name, say in your Instant Contacts list, the document libraries, a list of team space owners, and so on, you can chat with the person with a simple mouse click.

Introducing IM Availability

One of the bedrock principles of IM is called *availability,* which is used to indicate whether or not a member of the team is interested and capable of interacting. Will Joe on the Sales team answer your chat message, or won't he? The answer is revealed in his availability status.

When Joe is home, asleep, obviously, he isn't available, and WSE is smart enough to prevent you from sending him instant messages. But when 9:00 a.m. rolls around, and good old Joe arrives at the office and logs in, wouldn't it be nice to know, should you have a question for him, that he's there, logged in, sipping his Double Latte Grande Frappuccino, with just enough time to chat before his next team meeting? That's the essence of availability.

Figure 5-2 shows a *document library* — a list of folders, documents, and document authors. Look closely for some of the author names and you see a little green icon (supposed to look like a bust of a person's head and shoulders) that indicates that the person is available. He or she is ready, willing, and able to receive instant messages.

Sometimes, you or a teammate may not want to be interrupted by an IM. When that's the case, you'll know it. You can see that one of the authors shown in Figure 5-2 doesn't have the little presence indicator at all, and that tells you that the person isn't online and isn't going to respond to your IMs.

Figure 5-2:
Names in
WSE are
live, and tell
you if a
person is
online,
available,
and willing
to chat.
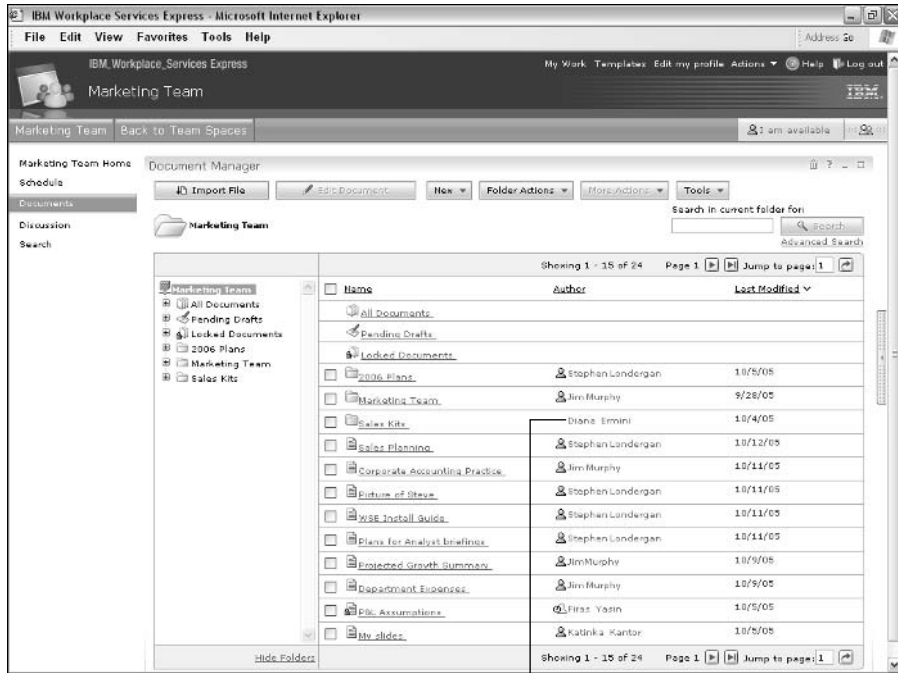
This person is offline.

TIP

To chat with someone who is online, simply click his or her name. A little
built-in menu appears, giving you the option to start a chat with the person.

There are actually four different states of availability:

✔ **Available:** The person is online, logged in to WSE and IM, and ready to
receive IMs.

✔ **Away:** The person is logged in to WSE, but isn't paying attention to WSE
at the moment, perhaps he or she stepped away for lunch or a meeting.
You can still send this person an IM, but don't be surprised if he or she
doesn't reply right away.

Any message you send to someone with the little clock icon next to his
or her screen name stays on the user's screen in the hopes he or she will
notice it upon return. Similarly, if you set your own status to Away, your
teammates can send you IMs, which you'll find waiting on-screen when
you return.

Stephen Londergan

✔ **Do Not Disturb:** This status indicates that the user is logged in to WSE, but is too busy at the moment to accept IMs. When your status is set to Do Not Disturb, no one can send you an instant message, and when you see that your buddy's status is set to Do Not Disturb, you'll have to send an e-mail instead. WSE won't even let you send an IM to a person who is "in" Do Not Disturb.

David Nixon

✔ **Logged Out:** When a user isn't connected to instant messaging, you see no icon or indicator. There's no status at all. You can't send the person an IM.

Knowing about your teammates' availability is important, but what about your own? You have to decide whether you, yourself, are available. In other words, do you want your teammates to be able to send you instant messages? When a teammate sees *your* name, how shall it be represented, availability-wise? Do you have that little green head, or not?

Setting your availability

Use the Availability button, located in the upper-right corner of the interface (usually just below the IBM logo) to change your status. Figure 5-3 shows that the Availability button has its own drop-down menu from which you can choose your WSE status.

Figure 5-3:
Use the
Availability
button to set
your status.

I am available		& I am available
I am away		
Do not disturb		
Customize status		
Log out of instant messaging		

When you change your status, you yourself won't see much happen, other than the fact that the Availability button itself changes to reflect your say so. However, as soon as you change your status from, say, Available to Away, the icon next to your name automatically and instantly changes in all of your teammates' Instant Contacts lists, and next to your name in every document you've authored, team space you own, and so on.

Changing your message

When you hover your mouse over a person's name in WSE, you see a short message that gives you a little more information about the person's status, or maybe about his or her state of mind. The default messages are pretty ho-hum and matter-of-fact. They indicate that you are available, have stepped away, or don't want to be disturbed.

However, you can change your availability message — what your teammates see when they hover over your name — by following these steps:

1. **Click the Availability button.**

   A drop-down menu appears.

2. **Select Customize Status from the drop-down menu.**

   The Availability dialog box appears.

3. **Select either I am Available, I am Away, or Do not Disturb in the Availability dialog box.**

4. **Enter your customized message in the corresponding Status Message field.**

   See Figure 5-4.
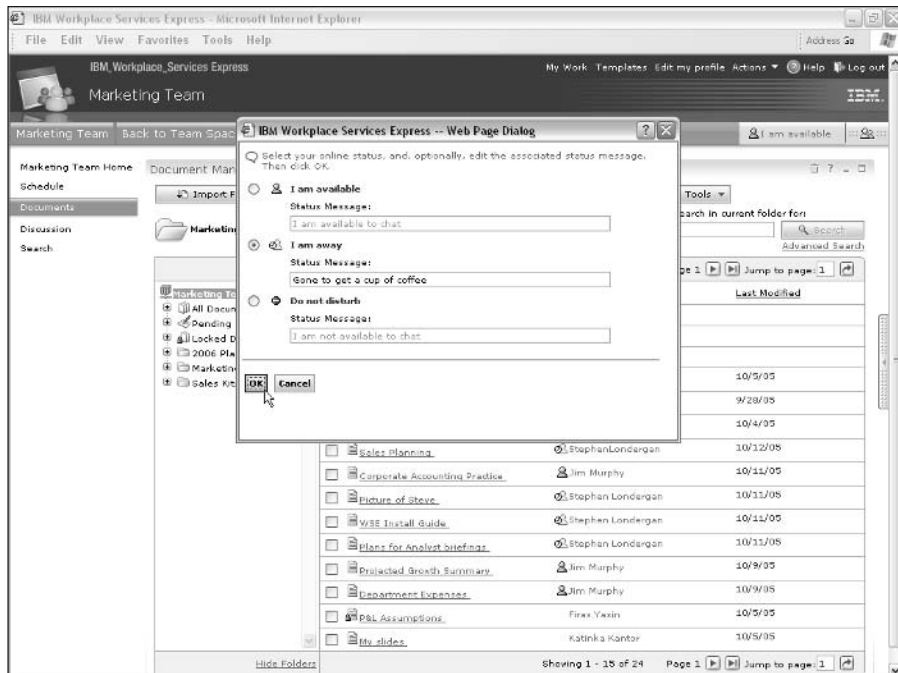
Figure 5-4:
You can customize this message to let people know how you're feeling.

5. **Click the OK button.**

   The dialog box closes. Now every time a teammate hovers his or her mouse over your name, he or she sees your message.

Introducing Live Names

One of the central and most innovative aspects of WSE is the way it enables you to work with people. In any context, at any time, your team is available to you. You can see at a glance who is online; communicating, instantly, with someone on your team is as simple as clicking your mouse.

When you encounter a person's name, you can interact with that person by clicking the person's name. Whether you're looking at the name of someone who appeared as the result of a search, the name of a person who created a team space, or the name of a person who composed the document you are reviewing, all you have to do is click. The technology that enables all this interactive clicking is called *Live Names.* As you can see in Figure 5-5, when you click a person's name, you get a menu of options for interacting with that person.
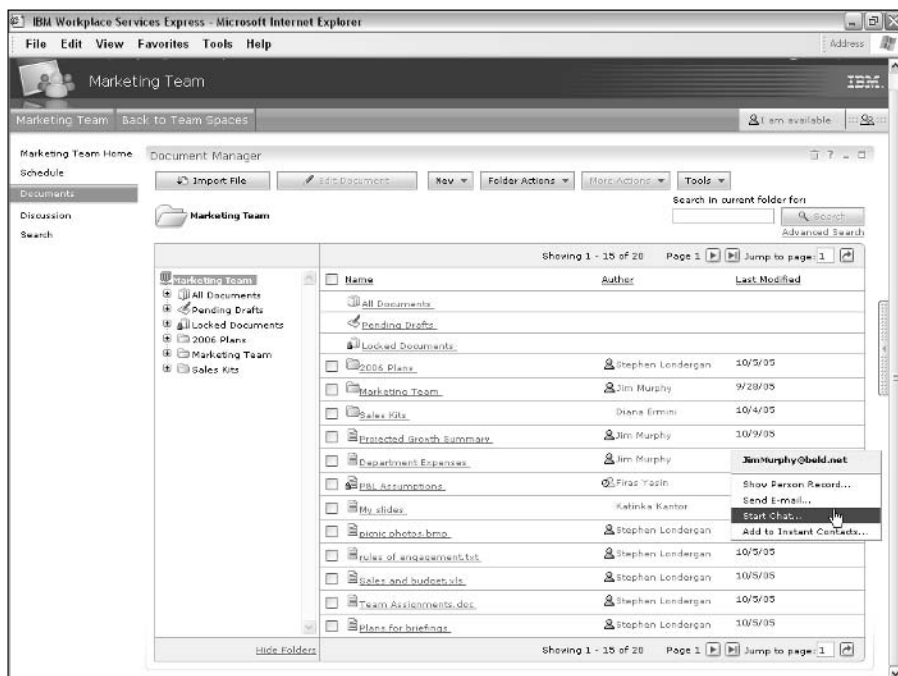
Figure 5-5: Any time you see a person's name, you can click it to interact with the person.

Another thing you may see when you click a person's name is his or her directory information — like phone number and so on. Here is a list of the other menu options sometimes supplied by Live Names:

✔ **Show Person Record:** Choose this option to see all of the information that is in your company's directory about the person.

✔ **Show in Organization View:** Choose this option to see a mini organizational chart, especially useful if you need to see who the person's boss is so you can rat the person out for doing a crummy job.

✔ **Send E-mail:** Choose this option to switch to your e-mail; useful if the person is not online and you need to ask a question or make a comment.

✔ **Start Chat:** Choose this option to open a Chat dialog box and exchange instant messages with the person.

✔ **Add to Instant Contacts:** Choose this option to add the individual to your WSE list of contacts.

This idea of being able to reach out and touch someone any time is one of the most important and central ideas to WSE. In fact, instant access to teammates (whether they're down the hall or on a separate continent) is crucial and is the whole concept of team collaboration.

Keeping in Touch with Your Teammates with the People Palette

Click the People button whenever you need to interact with the members of your team. When you click the People button, the People Palette slides out, as you can see in Figure 5-6. You use the People Palette to do three distinct things; find people, exchange instant messages with them, and manage your Instant Contacts list.

Most IM programs include what's called a *buddy list.* Although the WSE refers to its "Instant Contacts list," you can call it a buddy list if you want.

Using the People Finder

The People Finder is an aptly named tool in the People Palette. Use the People Finder to look up a member of your team. Maybe you need to find a person's phone number, or you want to see if he or she is online and

available for a quick chat. Perhaps you aren't exactly sure what the person's name is, but you need to find someone in a certain department or division. All of these are great quests to which you can (and should) put the People Finder to great use.

You usually search for a person by name; conducting such a simple search is a matter of following these steps:

1. **Click the People button.**

   The People Palette appears.

2. **Enter the person's name in the Search For field.**

   Enter as much of the person's first and/or last name as you can.

3. **Click the Search button.**

Figure 5-7 shows the results of such a simple search. As you can see, the Search results show as much information as is available about the individual, including the person's full name, e-mail address, and phone number.
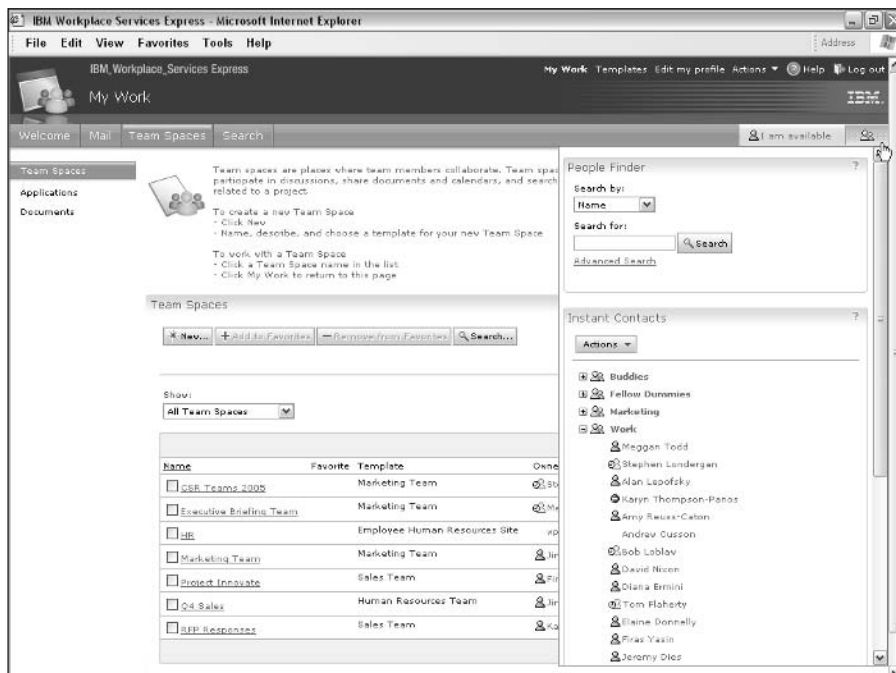
Figure 5-6: Use the People Palette to work with the people on your team.
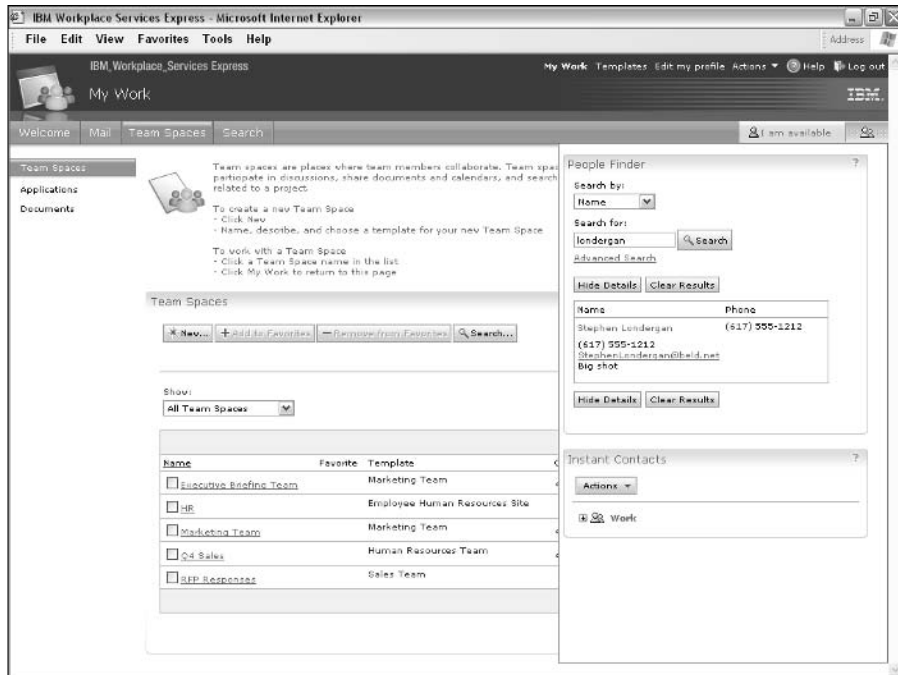
Here are some tips for using the People Finder to go beyond the basics:

- ✔ If you need to find someone but you don't know his or her name, use the Search By list to pick a different field to match. You can search by name, user ID, e-mail address, phone, department, or job title.

- ✔ When you get search results, you can use the Hide Details button if you don't need to see all the particulars. This is a useful option if a search for John Smith resulted in several names. Hiding the details enables you to make the list as concise as possible. (Of course, you may need to use Show Details if you want to differentiate between all these Smiths.) Use the Clear Results button to start a new search.

- ✔ If you need to find a person but you don't know the person's name, you do have some options, as long as you have *something* to go on (hey, the People Finder isn't a miracle worker). If you know that the person is the head of a department, or you know the person's employee ID number, that's a start. When you click the Advanced Search link (it is just below the Search For field), you see the Advanced Search form, as shown in Figure 5-8. When you perform an advanced search, you have more fields to use. Enter what you know about the person in the appropriate field(s), and click the Search button to see whether you get any matches.
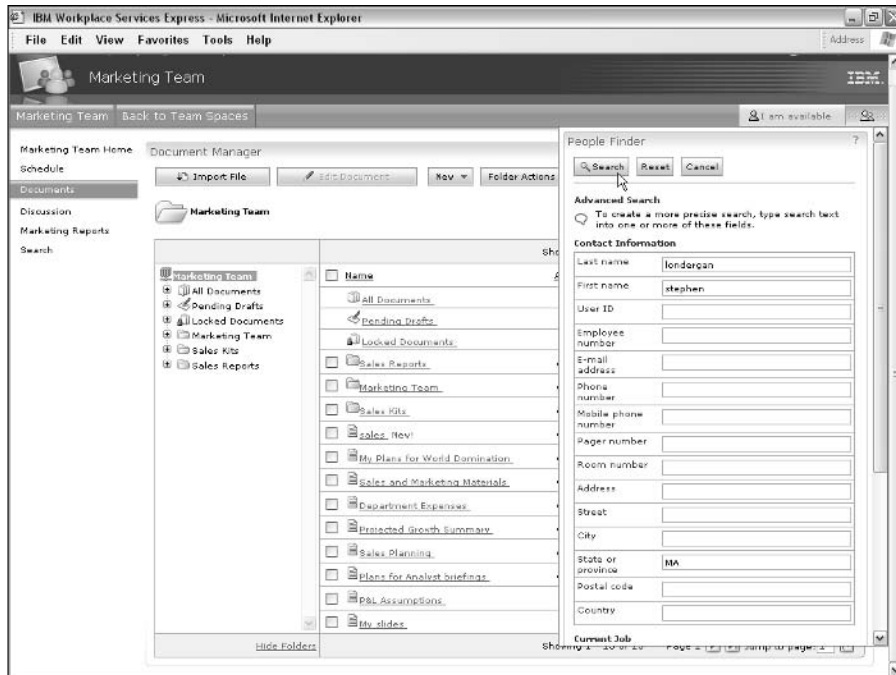
Figure 5-8:
You can use advanced search functions to find people.

Sending instant messages

Instant messaging is all over the place in WSE; every time you encounter the name of a person who is logged in, you can chat with the person without having to stop what you're doing or switch to another program.

Figure 5-9 shows a Chat dialog box, and as you can see, instant messaging works pretty much the same way it does in other instant messaging programs. You type a message at the bottom of the dialog box. Click the Send button (or press Enter), and your message appears in the Chat dialog box.

Most of the Chat dialog box is taken up by the transcript area, where you can see what you've been talking about. When you look at the chat transcript, your messages appear in blue text, while your teammate's messages are black.

TIP
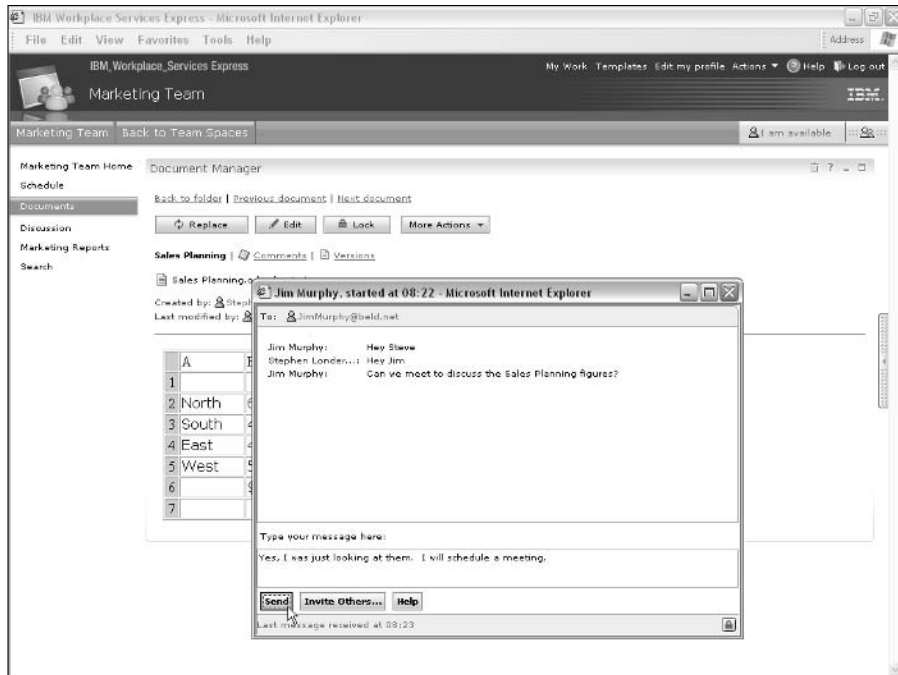
Here are some friendly tips and tricks for using the IM functions:

✔ **Quickly add hyperlinks:** When you type a Web page URL in a chat
(www.dummies.com, for example), the URL automatically becomes a
clickable hyperlink.

✔ **Invite others to the party:** Use the Invite Others button when you
want to ask someone else to join your conversation; you can use the
Directory Search dialog box to search for the name of the person you'd
like to invite to the chat.

Of course, you can only invite a person if his or her status is Available
or Away. If the person is not logged in or if he or she sets her status to
Do Not Disturb, WSE stops you from sending the invite. Also, when you
have more than three or four people in a chat session, things usually get
out of hand pretty quickly. Figure 5-10 shows an IM chat with four
people; if you had 12, that'd be too many.

✔ **End the chat with a click of the mouse.** Close a chat and end your
conversation by clicking the X in the upper-right corner of the Chat
dialog box.
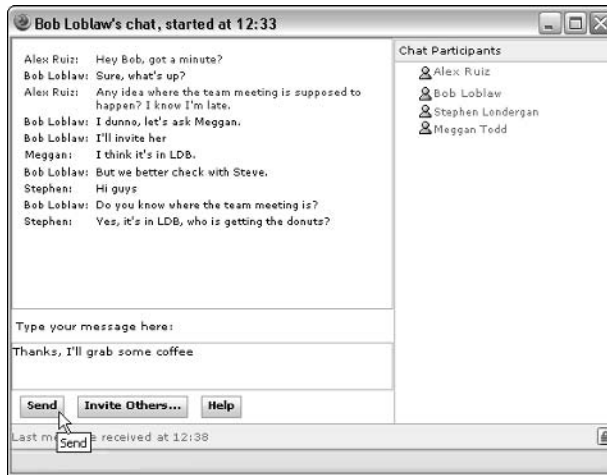
Figure 5-10:
You can
have more
than two
people in an
IM chat.

When you end a chat, the conversation goes away, and isn't saved at all. WSE does include a facility called a *chat room,* which is like instant messaging but *does* preserve a conversation's transcripts after the conversation is over. Take a look at Chapter 9 to read more about my favorite WSE feature.

Using (Or not) the Instant Contacts list

The People Palette includes a built-in Instant Contacts list, which you use to keep your close contacts near and dear. The basic premise is that the people with whom you interact with most often belong in your Instant Contacts list, so that they're always just a click away. You can also have groups in your Instant Contacts list to help keep the names of your contacts organized.

You may be surprised to find that you will use the Instant Contacts list less than you think; because names are *live* and chattable all over WSE, you have less reason to open your Instant Contacts list when you need to ask someone a question. Say, for example, that you're reading a document that has been posted to your team's document library, and you have a question or need clarification from the document's author. You could, of course, use the People Palette and your Instant Contacts list to see whether the document's author is online and available, and then start a chat. But because the document already identifies the author's name, and because the author's name is alive (it automatically lights up to tell you whether he or she is available), you can just click the author's name to get your little chat party rolling. For more information about Live Names, check out the section earlier in this chapter, "Introducing Live Names."

But don't dump the Instant Contacts list just yet. This handy list of buddies is very useful in a variety of situations.

You can add a name to your Instant Contacts list in one of three ways. You can

✔ Click the user's name and select Add to Instant Contacts from the built-in drop-down menu (see "Introducing Live Names," earlier in this chapter).

✔ Search the directory for the individual in question.

✔ Add the individual's name to your Instant Contacts list by entering his or her e-mail address.

Searching the directory to add a person to your Instant Contacts list

Use these steps to find a person in the directory and add him or her to your Instant Contacts list:

1. **Click the People button.**

   The People Palette appears.

2. **In the Instant Contacts portlet, choose Actions⇨New Contact.**

   The New Contact form appears in the Instant Contacts list.

3. **Click the Find Person button.**

   The Directory Search: Find People dialog box appears.

4. **Enter the name (or as much as you know of the name) in the Search For field. Click the Search button.**

   The name(s) of the people who match your search term appear.

5. **Select the name(s) you want to add and click the Add button.**

   You can add multiple names at the same time, and/or remove a name you have mistakenly added.

6. **Click OK.**

7. **If you want to add the new contact to a group you already have in your Instant Contacts list, select the name of the group from the Add to Existing Groups list.**

   For example, if you want to add Martha Stewart from Sales to your Sales Instant Contacts group, select the radio button for that group.

8. **If you want to add the contact to a brand-new group, click the Add to New Group radio button and enter the name of the new group in the Add to New Group field.**

The contact you choose is actually listed as the new group's founding member.

9. Click OK when you're done.

TIP

Searching is the best way to add a person to your Instant Contacts list, because you guarantee you won't accidentally misspell a person's name. Using the Search tool also prevents you from adding the wrong contact (say Martha Stewart from Accounting instead of Martha Stewart from Sales).

Adding a person to your Instant Contacts list by using his or her e-mail address

Use these steps to add someone to your Instant Contacts list by looking up his or her e-mail address in the directory:

1. Click the People button.

The People Palette appears.

2. In the Instant Contacts portlet, choose Actions⇨New Contact.

The New Contact form appears in the Instant Contacts list.

3. Click the Add by E-mail Address tab.

4. Enter your new contact's e-mail address in the E-mail Address field.

5. In the Display Name field, enter the name by which you want the contact to be listed in the Instant Contacts list.

You can add a nickname (Marti) or another identifier (Martha in Sales).

TIP

One distinct advantage of adding people to your Instant Contacts list by typing their e-mail addresses is that you also get to use the Display Name field. You have the power to change `stephen_londergan@ dummiespress.wiley.com` to something a little more user friendly, like `Steve L`, in your Instant Contacts list.

6. To add the new contact to a group you already have in your Instant Contacts list, select the group from the Add to Existing Groups list.

7. To add the person to a brand-new group, click the Add to New Group radio button and enter the name of the new group in the Add to New Group field.

The contact will be listed as the new group's founding member.

8. Click OK when you're done.

Figure 5-11 shows the Add by E-mail Address form.
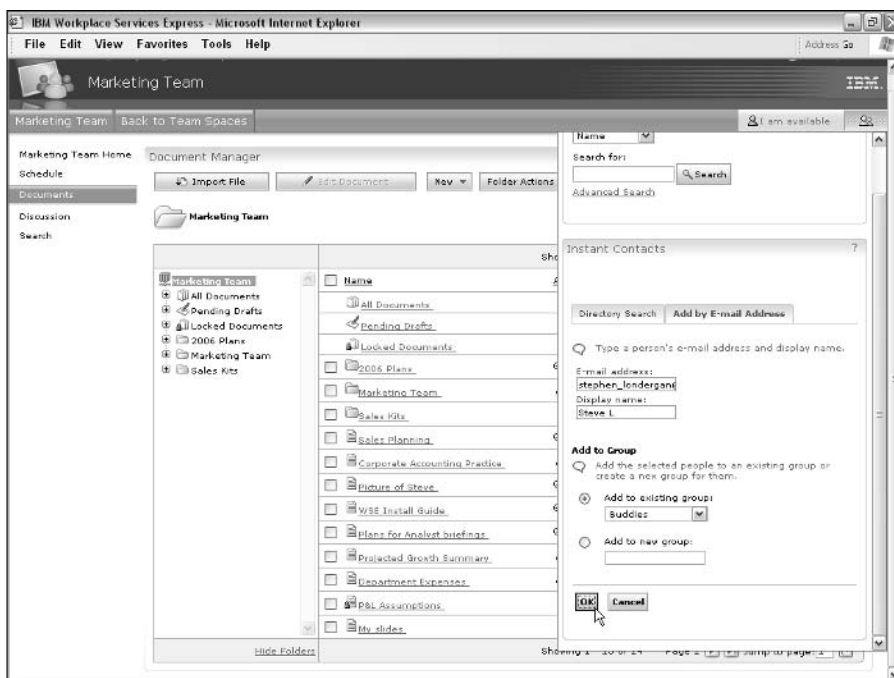
Removing someone from your Instant Contacts list

If you find that you don't want a particular person in your Instant Contacts list any more, you can click the contact's name in your Instant Contacts list and select the Remove from Instant Contacts list option.

Banishing a person from your Instant Contacts list isn't quite as antisocial as it may first appear, because you can always chat with the person by clicking on his or her name when you run across it in a document library, chat room, or some other WSE cyber location. And if the person is ever back in your good graces, you can use the steps outlined in the previous sections to add the contact to your Instant Contacts list.

Adding a group from the directory

The quickest way to load up your Instant Contacts list with people is to add a group from your company's directory. Chances are that your administrator has already set up a group that contains all of the names of the people on your team, for example, so adding that group is a shortcut to making an Instant Contacts list that includes all your teammates.

Another advantage to this tactic is that you eliminate some of that mainte-
nance work everyone hates. Ready-made groups that appear in your Instant
Contacts list are updated automatically, as your system administrator adds
and removes people from the master membership list.

Use the following steps to add a public group to your Instant Contacts list:

1. **Click the People button.**

   The People Palette appears.

2. **Choose Actions⇨New Group.**

3. **Click the Public Group radio button.**

4. **Click the Find Group button.**

   The Directory Search: Find Groups dialog box appears.

5. **Enter the name of the group in the Search For field and click the
   Search button.**

   WSE displays all of the groups that match what you entered in the
   Search For field. The Directory Search: Find Groups dialog box appears;
   if you're not sure which group to select, click the View Group Members
   button to see the names of individual group members.

6. **Select the group you want to add and then click OK.**

   WSE closes the Directory Search dialog box and displays the Instant
   Contacts list.

7. **Click OK.**

   Your Instant Contacts list expands to include the group you selected,
   and displays the names of all the members. That's a lot easier than
   adding each name one at a time.

Got a big team?

If you have a big team, or a long Instant
Contacts list, the Actions button in your Instant
Contacts list can help in two ways:

✔ **Choose Actions⇨Show Online Contacts
Only.** The list contracts to show only the
people who are currently logged in to the
WSE system. Most people use the WSE
Instant Contacts list this way, and if you think
about it a second, it just makes sense. The
reason you have a contacts list in the first

place is to chat with your teammates; so
when the person isn't online and available,
why bother displaying his or her name?

✔ **Choose Actions⇨Collapse All Groups.** The
contacts list contracts to show just the
names of the groups. Click the plus sign
next to the name of a group to expand it
again and see its particular members, or
click the Actions button and select Expand
All Groups to see all members of all groups.

Part III
Getting Involved with Team Spaces

The 5th Wave   By Rich Tennant

"And tell David to come in out of the hall. I found a way to adjust our project budget estimate."

In this part . . .

*T*eams aren't just for sports players, these days. The concept of a team has become almost a cliché, but it is nonetheless important to WSE. You may belong to one team or many, and your team may be small (2 people) or large (2,000). Whatever the case or team size, WSE is here to help you and your teams become more productive.

These next chapters guide you through one of the most important parts of WSE: using team spaces.

Caution: Reading Part III can lead to a frenzy of new ideas and ways to work with your colleagues. By the time you get to the end of this part, you'll be wondering how you (and your team) ever worked without WSE.

Chapter 6

Introducing Team Spaces

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*T*eam collaboration is the very essence of IBM Workplace Services Express, and so most of your interaction with your team's information, documents, and members happens in your *team spaces.* This chapter shows you where team spaces come from, how you find them, and how to start using them.

For even more information about team spaces (how to create them, and how to use team space templates, for example), check out Chapter 14.

Getting to Know a Team Space

Figure 6-1 shows you what a *team space* looks like. A team space is sort of the home page for a particular team or project; it's the online place where everything that's related to the team or project is stored. (Got a kitchen sink?) All the documents, information, schedules, discussions, milestones, and contact info for key players are collected together in a team space and made available to everyone connected to the project or team.

No two teams are exactly alike, and no two projects are, either. That's why each team space you use is a little different in its design and content. Some team spaces are relatively staid, with infrequent updates and relatively stable content, while others are much more interactive, with daily (or even hourly) updates, new documents being posted all the time, and what seems like constant updates to the team's calendar and tasks.
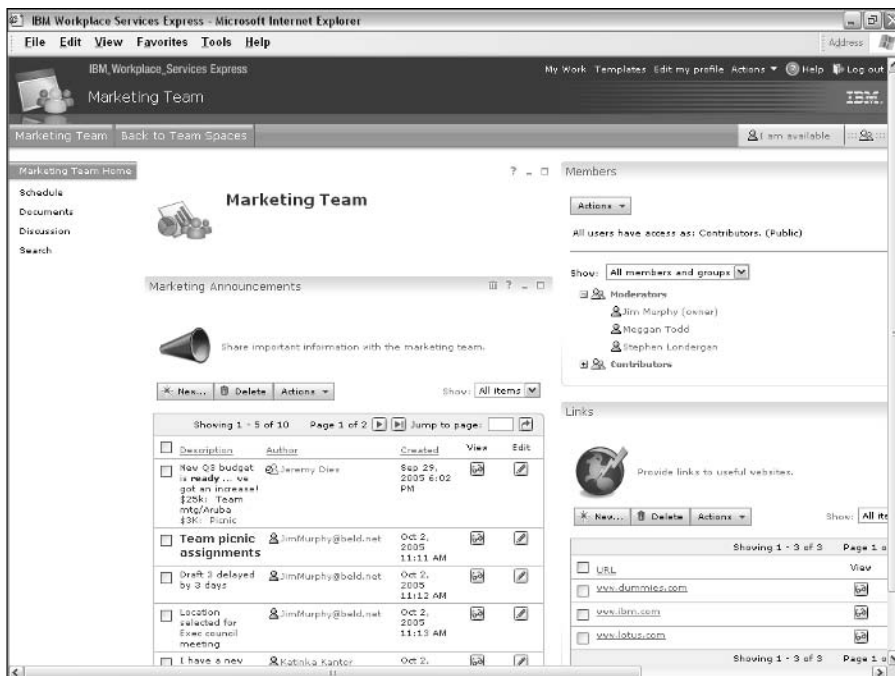
Figure 6-1:
A typical
team space
features
announce-
ments, a list
of members,
and maybe
some links.

Creating a team space from a template

IBM Workplace Services Express makes starting a new team space easy because you don't have to start from scratch. WSE comes with about a dozen team space *templates,* which are intended to jump-start your team or project.

The basic idea here is that because you're so busy working on your project, you don't have time to build a bunch of pages or assemble all the collabora-tive tools to support your team. You instead pick the template on which your new team space will be based and modify it to suit your particular needs.

REMEMBER

I really can't think of too many scenarios in which you need to build a brand-new team space 100 percent from scratch; you're more likely to make a new team space, based on one of the WSE team space templates, and then modify the new team space to suit your needs. The good folks on the development team over there at IBM put some effort into providing a variety of templates that are most commonly used. Some companies (IBM business partners) sell team space templates that they've created.

TIP

Building your own team space templates

If you run across a scenario in which none of the existing team space templates can do the job, you can make your own templates. If you're in a real bind, you can buy templates, too.

Say you've modified a team space to suit your needs for the type of project that frequently gets repeated. You could turn that team space into a template of your own — that way, the next time you start a similar project, you'll be *two* steps ahead of the game. See Chapter 14 for more information.

Templates save you time, which means your team is up and running quickly. The bottom line is that team space templates put you one step ahead of the game.

Here's a list of the team space templates (IBM sometimes refers to them as *application templates,* but that's a little stuffy, don't you think?) that come with WSE:

- ✔ **Chat Room:** A chat room is a virtual place where people can have real-time discussions. A chat room is similar to instant messaging, but chat room conversations are automatically recorded, can be archived, and are searchable.

- ✔ **Customer Support Team:** A collection of announcements, issue-tracking tools, FAQs, and other functions that help a customer support team.

- ✔ **Discussion Thread:** A threaded discussion forum enables continued dialogue, but unlike a chat room, the dialogue doesn't occur in real time. You *post* topics to the discussion board at your convenience, and others read your posts and reply when they have time, as well.

- ✔ **Document Library:** A complete document management solution that includes versions, approvals, and integration with familiar desktop applications.

- ✔ **Employee Human Resources Site:** This template provides an online place for an HR team to share or publish announcements, links, FAQs, and documents to the entire company.

- ✔ **Event Planning:** Plan group events, outings, and meetings with this template.

✔ **Human Resources Team:** Use this template to create a team calendar, employee directory, document library, and other tools to help a Human Resources team.

✔ **Marketing Team:** Use this template to create team tasks, a team calendar, document library, and other tools to help a Marketing team.

✔ **Meeting Materials:** A great template if you plan on meeting with your team mostly in person; this template consists of a virtual location to plan and organize meetings, and to track their results.

✔ **Sales Team:** Set up team tasks, a team calendar, customer tracking functions, and other tools to help a Sales team.

✔ **Team Project:** Set up team tasks, a team calendar, a discussion forum, a real-time chat room, and document management functions.

✔ **Team Project, Extended:** Building off the original, this template also offers FAQs, links, vacation schedules, and project milestones, but is intended to serve long-term projects.

Using the team space member list

One of the things that defines and distinguishes a team space is the list of people who have access to it. You probably won't have access to every team space at your company, for the same reasons you don't have to attend every single meeting at your company. And if you wanted to attend a meeting in some other department, you'd probably get stopped at the door.

Likewise, every team space has a membership list that determines who does and who doesn't have access. For those people who *do* have access, the member list also explains exactly *how much* access the person has.

Most team spaces have at least three levels of access:

✔ **Owner:** The king or queen of a team space, who has the veritable keys to the kingdom, is the *owner.* The owner can do just about anything in that team space. The most important power this sovereign has is the power to grant and deny other people access to the team space; his or her highness can also delete the entire team space, if he or she is so inclined. Owners can add and delete documents as well. Usually, the owner is a manager, team leader, or project manager. And there's only one king or queen of the kingdom, so only one person is designated this supreme right.

✔ **Moderator:** A team space can have multiple *moderators,* and these people hold a lot of water in a team space because they can grant and deny access to other people, too. The other thing moderators can do is delete documents and information that other people post. The only difference between a moderator and a team space's owner is that a team space only has one owner, who can do *everything,* including transferring ownership of the team space altogether. Moderators, on the other hand, are different because a team space can have multiple moderators, who can do everything, *except* transfer ownership.

✔ **Contributors:** The most common type of person in a team space is a *contributor;* the rank and file contributors can add documents to the team space's libraries and discussion areas, interact with others, post information in the team space's forms and calendars, and so on. Contributors can't grant team space access to other people, and they can only edit and delete the documents and information that they themselves post in the first place. You will probably have contributor access to most of the team spaces you use.

Although some team spaces have even more levels of access (which are officially known as *roles*), it's a pretty safe bet that you'll always encounter at least these three.

Getting to Know the Team Spaces Catalog

The Team Spaces Catalog is the directory of team spaces to which you have access, and it's also where you go when you want to create a new team space. The Team Spaces Catalog has a few built-in tools to help you manage and organize the list of team spaces, which, in the likely event that your organization has many team spaces, may become big and unwieldy.

To access specific team spaces through the Team Spaces Catalog, click the Team Spaces button on the Navigator toolbar at the top of the screen.

The Team Spaces Catalog, which shows you the team spaces to which you have access, appears (see Figure 6-2).
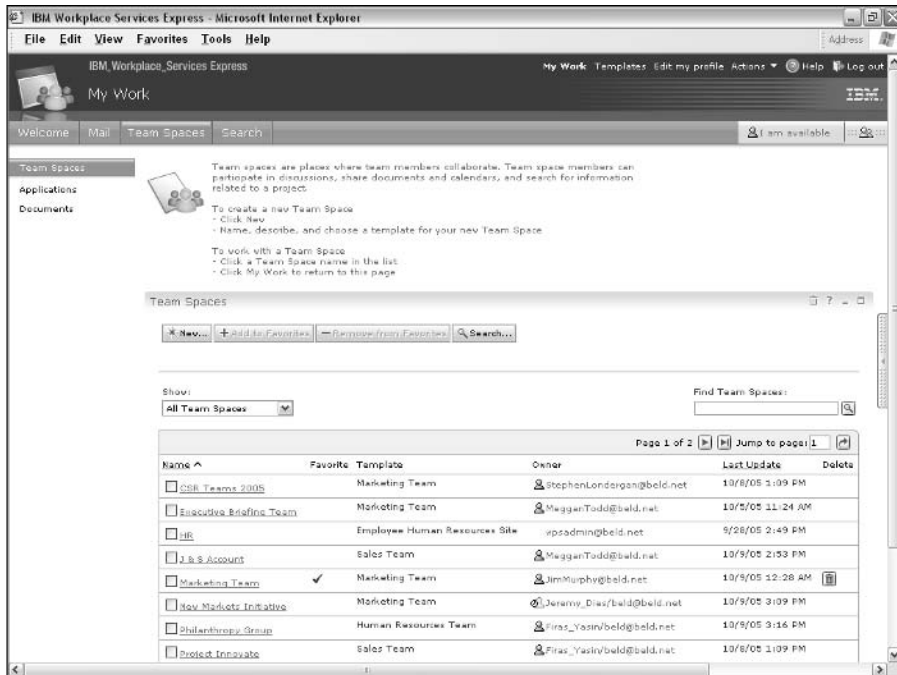
The Team
Spaces
Catalog is
your entrée
into a team
or project's
information,
documents,
and people.

Team spaces to which you don't have access don't appear in the catalog.

The list of team spaces in the catalog has six columns:

- ✔ **Name:** Every project or team has a name, and so does its team space. The team space's name is also the link you click to open the team space.
- ✔ **Favorite:** This column indicates whether or not you have selected the team space as one of your own personal favorites.
- ✔ **Template:** This column indicates which team space template was originally used to create the team space.
- ✔ **Owner:** The name of the person in charge of the team space appears in this column.

✔ **Last Update:** This column identifies the date and time of the last change that was made to the team space. Perhaps a revised document was added, a new item was posted in a discussion area, or an out-of-date contact was removed.

✔ **Delete:** If, and only if, you are a team space's moderator or owner, you can delete a team space altogether.

TIP

Click the column heading for the Name column or the Date column to have the list of team spaces sorted by that column.

Accessing a team space

Opening a team space couldn't be easier, because the name of each team space to which you have access is a clickable link. Just click the team space's name to leave the catalog altogether and open the team space in question.

Searching for a team space

If you know a team space's name but you can't find it in the list, you can enter the name in the Find Team Spaces field and click the Search button. The Find Team Spaces field is at the top of the catalog.

To search for a team space by name, enter the first few letters of the name in the Find Team Spaces field and click the Search button. The list of team spaces listed in the catalog shortens to show just the team spaces that start with the same letters. Figure 6-3 shows the results of a search that begins with *RFP.*

REMEMBER

This search feature is poorly named, because you aren't searching, you're matching the first few letters of a team space's name. For example, if there's a team space named *2005 Marketing Plans,* and you enter **Marketing Plans** into the Find Team Spaces field, the search won't find it. You have to know and enter the beginning characters of the team space's name to use this feature.

Use the Clear Results button if you want to reset the list of team spaces that you can see.
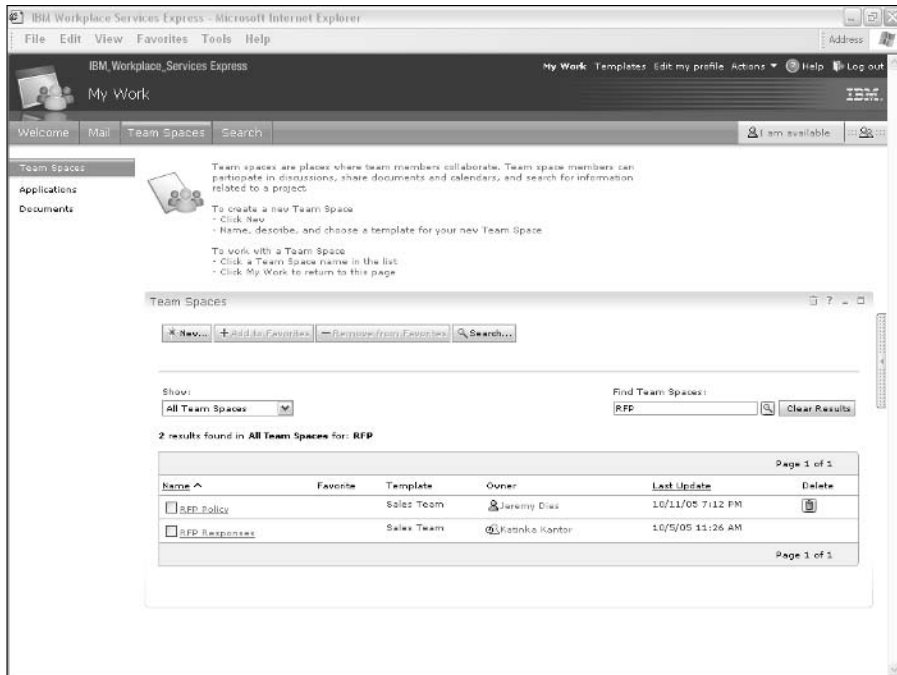
Figure 6-3:
Use the
search
options to
find a team
space by
name.

Sorting the Team Spaces Catalog

You can sort the team spaces with the Show drop-down list. Click the drop-down list to sort

✔ **All Team Spaces:** This sorting option is pretty straightforward. These are all the team spaces for which you're a contributor, moderator, or owner.

✔ **My Team Spaces:** These are team spaces for which you're a moderator or owner.

✔ **Public Team Spaces:** These are team spaces that are open to everyone in the organization.

✔ **Favorite Team Spaces:** These are the team spaces that you designate as favorites. See "Using and setting favorites" for more information.

Even when you choose to view all team spaces, you only see the team spaces to which you have access. You can't view any other team spaces.

Using and setting favorites

If you find that there are certain team spaces that you use more often than others, tell WSE that these team spaces are your favorites by clicking the selection box next to the team space's name and clicking the Add to Favorites button. You can select more than one team space at a time. The team spaces you select as favorites are always displayed with a check mark in the Favorite column. Figure 6-4 shows the Team Spaces Catalog with two team spaces listed as favorites.

Now you can use the Show menu to have WSE display only these favorites (see "Sorting the Team Spaces Catalog").

TIP

If your company or organization has only a few team spaces, or if you personally have access to only a few team spaces, your list will be small enough that it's not going to be worth the trouble of setting up Favorites. This feature is only worth the clicks if your personal list of team spaces is so long that it's getting unmanageable, and you need a way to shorten it. And if that's the case, boy, are you a busy bee.

Figure 6-4: Identify your favorite team spaces to make them easier to find later.

These team spaces are designated as favorites.

Using the Team Spaces, Applications, and Documents Navigation Links

Team spaces make IBM Workplace Services Express work. However, WSE helps collect information in other ways and in other places. For example, *document libraries* help you share and organize documents, and the more you use WSE the more likely you are to create applications that connect WSE with, say, an Oracle database or another external application.

The links to document libraries and such applications (if you have any applications, that is) usually appear on the left side of the WSE screen. The menu enables you to choose from the following options:

✔ **Team Spaces:** Clicking the Team Spaces link takes you to the Team Spaces Catalog.

✔ **Applications:** Clicking the Applications link takes you to available software tools (usually, these tools are available to your whole company or organization).

✔ **Documents:** Clicking the Documents link takes you to available document libraries.

Most team spaces have document libraries of their own, which are specifically available to members of the team. You also have access to the system-wide document library area of WSE. The document libraries in a team space contain documents and files that are related to that particular team or project, while the document libraries in the larger WSE interface contain documents and files that are relevant to, and accessible by, your entire organization.

Check out Chapter 10 to find an introduction to WSE document libraries.

The WSE documentation considers a team space to be just another kind of application, albeit an application with a special, team- or project-related purpose.

Chapter 7

Working Together with Pages and Forms

. . . .

In This Chapter

▶ Navigating a team space

▶ Using team space forms to view, enter, and share information

▶ Understanding what makes tasks and the calendar special

. . . .

Sure, every team space is a little different. But there are certain things that are the same, in all of them. In this chapter, I explore how you master the stuff that will make you a master of them all.

The stuff that you can master to call yourself an expert is made up of pages, and forms. *Pages* are a lot like the Web pages you find on the World Wide Web, but team spaces have a lot of them, and they're a lot more interactive, as this chapter shows you. *Forms* are built-in features that help your team collect, organize, and display information about the project.

TIP

For basics on the different kinds of team spaces and form templates, check out Chapter 14.

Checking Out the Layout of a Team Space Page

The most basic part of a team space is the *page,* which contains a series of *forms.* Any given team space will have several pages, and any given page can contain multiple forms.

TIP

Forms are sometimes called *form portlets* in the WSE documentation and help screens, but I'll just refer to them as *forms,* if only for the sake of brevity. Forms contain *items,* sometimes called *documents*.

Some team spaces have many pages, and some have few, but every team space has at least one page. The Team Space home page in Figure 7-1 has four pages listed in the far-left column of the screen under the Marketing Team Home heading: Schedule, Documents, Discussion, and Search.

The home page also contains three forms, located in the main part of the page: Marketing Announcements, Members, and Links. If you examine the Marketing Announcements form, you can see that it contains ten items, but only five are displayed.

These are four separate team space pages.

Figure 7-1:
Team spaces contain one or many pages, and pages contain one or many forms.

Announcements appear here.

Navigating from one page to another in a team space couldn't be easier; just click the name of the page you want to view. For example, Figure 7-2 shows what happens in the Marketing Team Space when you click the Schedule button; not surprisingly, you see the Team Schedule page.

The pages themselves are divided into large columns. For example, the Schedule page in Figure 7-2 has one big column on the left that contains the Team Calendar, and another column on the right that contains the Team Tasks and Milestones forms.

Click here to see a page of schedule-related content.

Team Tasks

Figure 7-2:
Team Space pages organize information into columns.
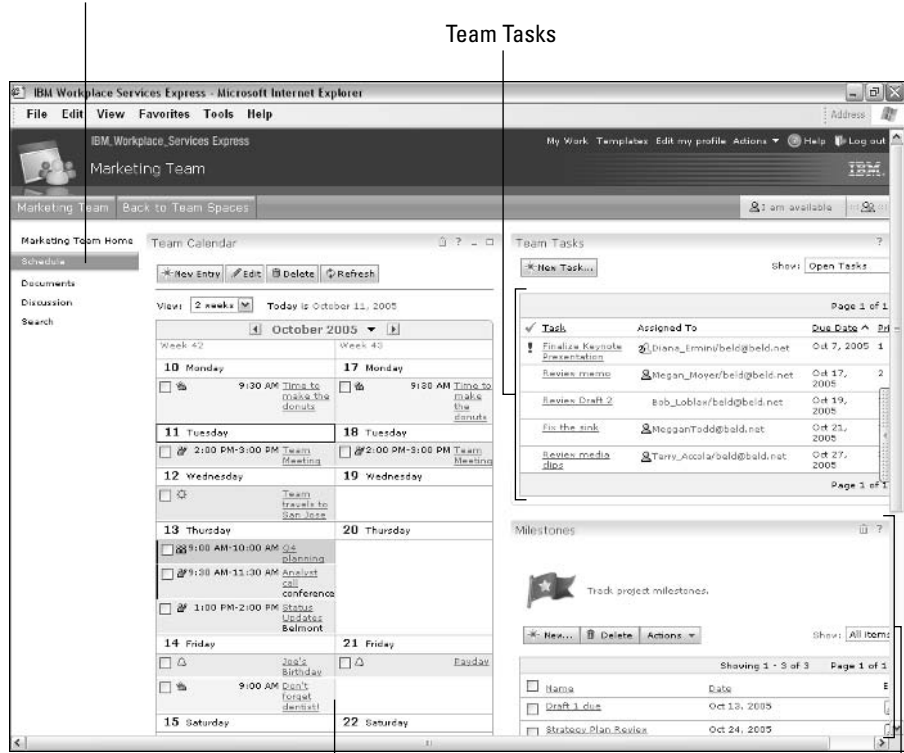
Team Calendar

Milestones

Having Fun with Forms

You and your team use forms to collect and display information in a team space.

TIP

You can create your own forms, but IBM Workplace Services Express comes with several built-in templates, so you can easily start with (and modify to your heart's content) the forms that come in the box. See Chapter 15 for more information about creating or modifying forms.

WSE comes with 19 of these built-in form templates, each of which can be broken into important project-related functions. Although there are many form templates in WSE, most of them work the same way, so mastering a few key concepts makes you a master of them all.

Using forms to access and manage people

Here are some of the ready-made forms you can use to organize and interact with the people who are involved with your team or project:

- **Attendance:** Helps keep track of who is coming (or who came) to a meeting or event.
- **Customer Contacts:** Keeps track of customer names and addresses.
- **Employee Directory:** Enables access to contact and address information about people in your organization.
- **Prospects:** Enables tracking of potential customers.
- **Sales Tracking:** Tracks the deals you have in the works.
- **Sign Up Sheet:** Enables employees to register for an event or project.
- **Survey:** You ask for information; team members answer.
- **Issues:** Helps track issues, whether good or bad.

Using forms to communicate messages

Here are some of the wonderful forms you can use and modify when you want to easily communicate with people on your team about project specifics:

- **Announcements:** Used to broadcast important information.
- **Agenda:** Helps you plan and run effective meetings.
- **Directions:** Gives people info about where they need to go.

- ✔ **FAQs:** Displays frequently asked questions and answers.
- ✔ **Links:** Keeps track of Web pages that your team should know.
- ✔ **Minutes:** Used for broadcasting meeting minutes and go-forwards.

Using forms to manage your deadlines

Calendar-related options ensure that no one on your team can say, "I didn't know that big report was due Tuesday!" Here is a list of forms you can use to manage your deadlines:

- ✔ **Milestones:** Keeps projects on schedule by enabling you to track key events.
- ✔ **Vacations:** Skiing, anyone?
- ✔ **Team Tasks:** Enables you to keep track of who is doing what, and under what deadlines.
- ✔ **Team Calendar:** The interactive team calendar enables quick and easy updates.

Managing views

When you encounter a form on a page in a team space, you see either a summary of all of the items in the form or you see details about one particular item. The summary of the items in a form is called a *view*. For example, refer to Figure 7-1 to see the portlet's display of the Marketing Announcement items.

You can click underlined column headings to sort the form's contents.

Say you have many items in the Announcements portlet — so many that you can't see them all on-screen. Use the Jump to Page field at the top and bottom of the screen, or use the Next Page and Last Page buttons to go to the next page or the last page.

You can confuse the Next Page and Last Page buttons in a portlet with the Next Page and Last Page buttons that correspond with pages in the team space itself. When you use a portlet's buttons, you change only what's shown in that portlet, not the rest of the team space's portlets. For example, referring to Figure 7-1, clicking the Next Page button in the Marketing Announcements portlet doesn't affect the Links portlet.

Using the Show menu

Many, but not all, forms have tools for changing the amount of information the form shows you. Using these particular features isn't worth the trouble if you're using a view that only has a few entries, but they can be very useful if the view has several entries.

Figure 7-3 shows the Team Tasks form, with a Show menu that helps you determine who's been slacking off. You can sort tasks in progress, overdue tasks, completed tasks, and more.

Not every form allows you to change the data shown, and the exact behavior of the Show menu is different from one form to the next. For example, the Employee Directory form's Show menu can display all of the employees, just the people who work in Boston, or just Chicago, San Jose, or Staines, while the Show menu on a Sign Up Sheet displays the names of those who have said they're not coming to your meeting.

Figure 7-3:
Use the
Show menu
to view a
portion of
categorized
information.

Using filters

You can control what you see in a form's view with *filters*. Filters reduce what's shown in a view, limiting information to just the items you want. Not all forms have filters.

Use these steps to turn on filters and limit which items are displayed:

1. **Choose Actions⇨Show Filters.**

   A list of filters appears.

2. **Double-click the document you want to see from the drop-down list at the top of the appropriate column.**

Figure 7-4 shows an example Description drop-down menu when you use filters with the Marketing Announcements portlet.

Figure 7-4:
Use filters to show just the items you want.
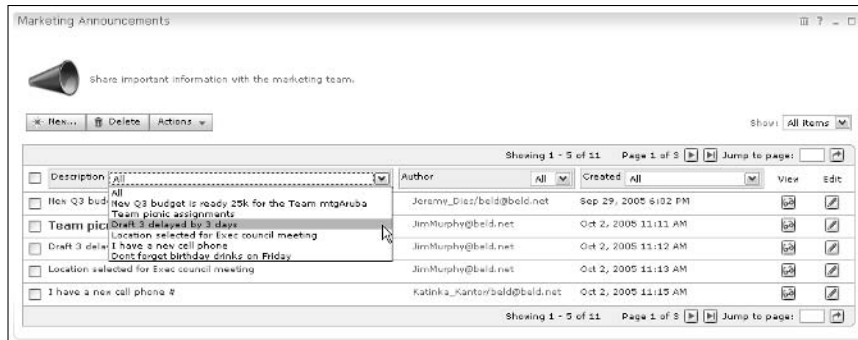
When you're finished using a filter, don't forget to click the Actions button and deselect the Hide Filters option so that you can view all the items again.

Searching a view

You can seek out specific items within a view using the built-in search capabilities that come with IBM Workplace Services Express. The Search function appears in most form portlets. Use these steps to search for information within a view.

1. **Choose Actions⇨Show Search in the portlet.**

   The Search By menu offers a list of options.

2. **Choose either All or the name of the field you want to search.**

3. **Enter the word or phrase you seek in the Search For field.**

4. **Click the Search button.**

   A list of results appears. (WSE lets you know if no items matched your search criteria.)

Reading items

You may want to view an item so that the item fills the entire portlet. When you click the View button next to the item in which you're interested, the Summary view is replaced with a detailed view of the item.

As you can see in Figure 7-5, when you open an item, you can then use the buttons at the top of the item to add a new item or (depending on your access rights) edit or delete the item. You can also click the Return to Form Documents button to return to the Summary view.
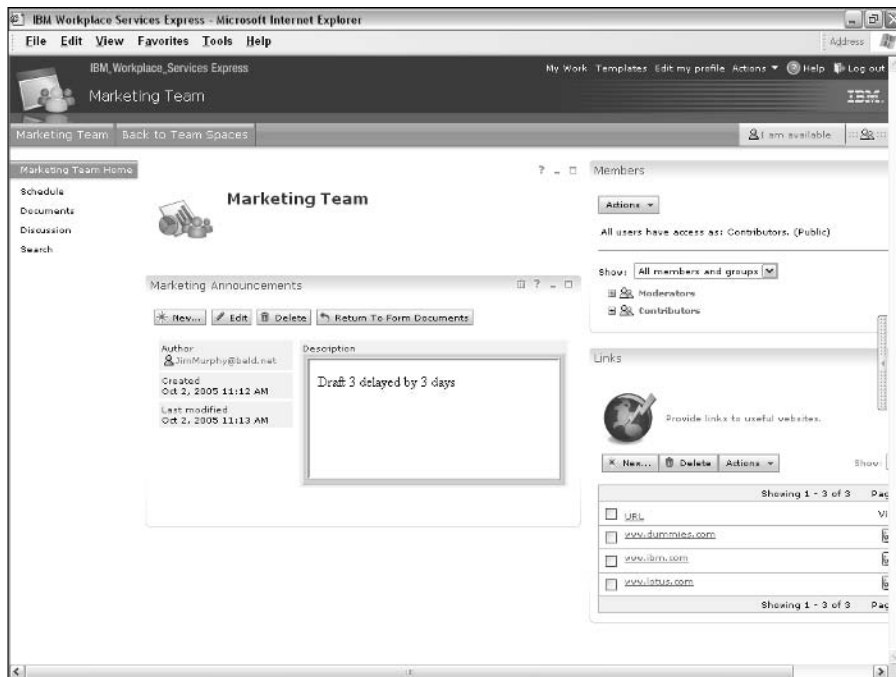
Figure 7-5:
Reading
an item
in detail.

Deleting items

🗑 Delete

In some situations you may want to delete an item — perhaps the item is something that you posted last year, and now it's out of date. Or maybe the item was posted by someone who is no longer on the team, and you want to remove it.

REMEMBER

Your role in a team space determines which, if any, of the items you can delete. If you're not the team owner or one of its moderators (see Chapter 6), you can only delete the items that you, yourself, posted in the first place. You can always ask your team space's owner for a promotion; or, failing that, to raise your access level if you need to delete items from other people.

You can delete an item when you view it in Summary view, or when you have the item open:

✔ **To delete an item in Summary view:** Click the check box next to the item you want to remove, and then click the Delete button at the top of the form, as shown in Figure 7-6.

✔ **To delete an open item:** Click the Delete button at the top of the form.

TIP

You can delete multiple items by clicking more than one check box before you use the Delete button.
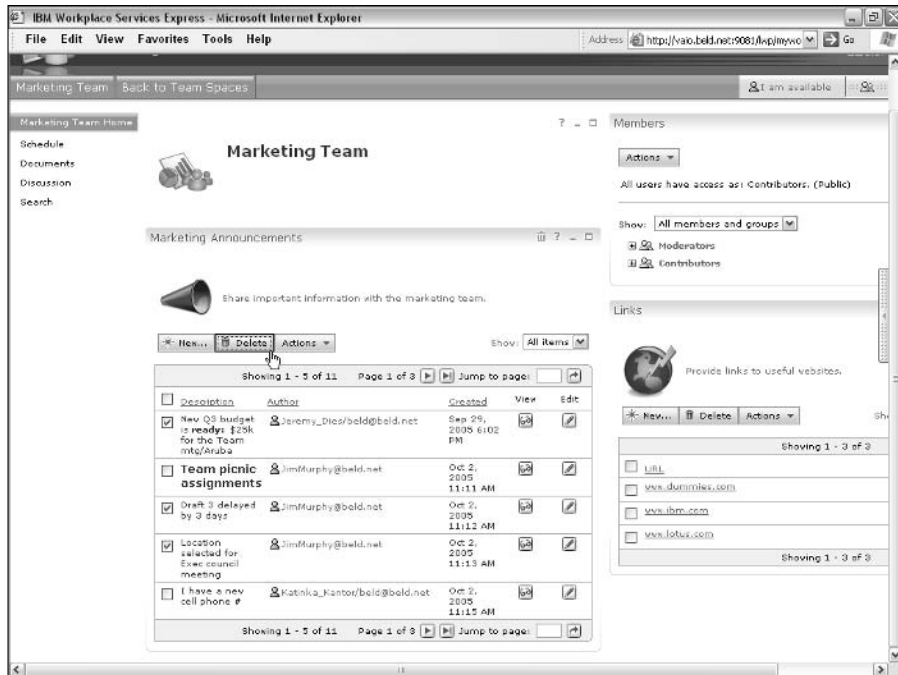
Figure 7-6: Deleting an item.

WSE doesn't have an Undo button for deleting items from a portlet, so be careful. When an item is gone, it's *really* gone.

Entering information in a form

Most forms have a New button, which you use to add a new agenda item, URL link, announcement, and so on. What exactly you see when you click that New button depends very much on the form you're using, of course. Sometimes you see a one- or two-field affair — perhaps just the description of the new task you're adding and the name for the person to whom it's being assigned.

In other cases, there's a little more to it. Figure 7-7, for example, shows the form used for entering a new Announcement. As you can see, this field offers *rich text* formatting options that enable you to use bold and italicized text, change fonts, and more.

Figure 7-7:
Some forms
let you
format
the text.

Don't get alarmed if you don't see buttons for creating new items or editing
existing items — many team spaces are designed so you can look but not
touch. And in most team spaces, you may have contributor access status,
which means you can only edit your *own* items, but not the items posted by
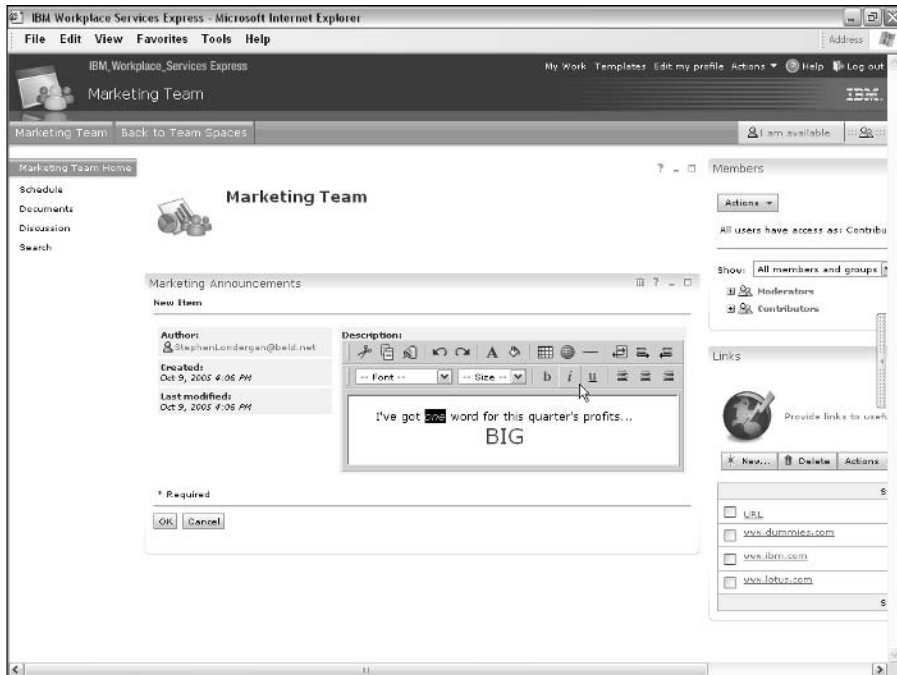others. If you think you need a higher level of access, you can always ask one
of the team space's moderators for a promotion.

The rich text editor in WSE works like other text-editing programs you've
used, so you should feel right at home when you're using a form that lets you
format the text in one of its fields. For example, you can use your mouse to
select multiple words, you can use Ctrl+C and Ctrl+V to copy and paste, and
so on. The buttons at the top of the editor help you control the way the text
you enter looks. Specifically, you can

✔ **Undo:** Nice to have this button, when you realize that you just made a
mistake.

✔ **Redo:** Nice to have *this button* when you realize that mistake you just
undid wasn't a mistake after all.

✔ **Text Color:** Changes the text color.

✔ **Background Color:** Changes the background color.

✔ **Insert Table:** Creates a table; you must choose the number of rows and columns.

✔ **Insert Link:** Adds a URL link that your team can click to open a Web page.

✔ **Insert Horizontal Rule:** Adds a horizontal line, which is useful for divvying your item up in to sections.

✔ **Flip Whole Document Direction:** Changes the text's orientation.

✔ **Text Direction Left to Right:** Changes the text direction to the right.

✔ **Text Direction Right to Left:** Changes the text direction to the left.

✔ **Font:** Picks a typeface.

✔ **Size:** Picks the text size.

✔ **Bold:** Emphasizes text with **boldface.**

✔ **Italics:** *Italicizes* a word or phrase.

✔ **Underline:** Underlines text.

✔ **Align Left:** Aligns the paragraph flush left.

✔ **Align Center:** Aligns the paragraph in the middle.

✔ **Align Right:** Aligns the paragraph flush right.

Click OK at the bottom of the form when you are finished creating or editing it, or click Cancel if you change your mind.

REMEMBER

Resist the temptation to use too much formatting with the rich text editor! Whatever you type is going to show in the form's Summary view, so if you get carried away, your entire team space's home page could be affected — especially if several other forms and portlets have to get pushed out of the way to make room for your flashy missive. If you refer to Figure 7-1, you can see that the text in the item about Team Picnic Assignments is larger than the rest. Imagine what would happen to the layout of the portlet (and the entire page) if you made too much text too large.

TIP

If you have a longer announcement with lots of text, or text that needs a ton of fancy formatting, you should put that item in the document library instead. See Chapter 10 for information on how to do exactly that.

Using Two Very Special Forms

Of all the forms you encounter in WSE, two are special enough, and different enough, that they merit some special attention. The *Team Task* forms and views are used to create and track activities that are related to your team or project. What makes these forms stand out from all the rest is that they enable you to assign tasks to a teammate, and then keep track of those tasks and whether or not your teammate is completing the task on schedule and keeping the project on schedule.

Slightly more complicated (and oh-so-much more special) is the *Team Calendar,* which resides in many team spaces, and which represents all of the meetings and events that are connected with the project or team.

Using the Team Task forms

Use the Team Task forms to assign and track work items relating to your project or team. Just because you assign a task to a person doesn't mean that he or she will do it, or do it on time, but WSE does help you track what has been assigned to whom, and what a task's status is.

TIP

Each task has a status associated with it; it can be open, completed, or overdue. Similarly, a task has a *priority* associated with it (priorities are ranked 1, 2, or 3). This tool is handy for determining how you handle tasks you've been assigned — tackle those Priority 1 tasks before you start Priority 3 tasks.

Deciphering task status symbols

Tasks are usually listed by due date, with tasks that are due the soonest listed first. As with any form, you can reorder the way the task items are listed by clicking the column heading for the task. Figure 7-8 shows a sample task list, sorted by status.

Some of the items in a task list may have an icon on the left side, such as the exclamation point that Figure 7-8 shows next to the Finalize Keynote Presentation item.

This item is overdue.

Figure 7-8:
Viewing
your team
tasks.

Here's the lowdown on each of the status options:

✔ The exclamation mark indicates that the task is overdue.

✔ The check mark means that the task has been completed.

✔ No icon at all means that the task is still open.

You can use the task list's Show menu to display just the tasks that have been assigned to you (including open, completed, and overdue tasks), all overdue tasks assigned to anyone on the team, just the tasks that are completed by the team, or all open tasks assigned to the team.

I show you how to make changes to a task in the following sections. Rest assured that the person who created the task (if that's not you) is notified by e-mail whenever someone completes, annotates, edits, or deletes a task. If you create a task for someone and you make a major change (it's now due tomorrow, not next week), you ought to drop the assigned task owner a quick note.

Creating a new task

Use these steps to create a new task:

1. **In the Tasks portlet, click the New Task button.**

2. **Enter a short description of what needs to be done in the Task Name field.**

3. **Enter the date by which the task needs to be complete in the Due Date field.**

   You can also use the Calendar picker to select the date.

4. **Select the task's priority level from the Priority drop-down list.**

   Choose 1 (High), 2 (Medium), or 3 (Low).

5. **If the task is being assigned to a specific person on the team, click the Find Person button to select the name of the task's owner.**

   You don't have to assign the task to anyone in particular.

6. **If you want the person who is assigned the task to be able to delete it, click the Allow Assignee to Delete Task check box.**

7. **If you want to allow the person to whom you assign the task to duck the task altogether by making someone else do it, click the Allow Assignee to Reassign Task check box.**

8. **Enter more detail about what needs to be done in the Task Description field.**

9. **Click OK.**

Figure 7-9 shows a sample task.

Figure 7-9:
Entering a
new team
task.

Editing a task

Usually, you can only edit a task if you are the task's owner, or the person to whom it has been assigned. If you don't see the Edit button associated with a task, and you want to make changes to it, you need to contact a team moderator to get permission to make changes. Assuming you have all the access you need, follow these steps to edit a task:

1. **Click the name of the task in the first column.**

2. **Click the Edit button.**

3. **Make the changes you need in the task's fields.**

4. **Click OK.**

    The task is updated. From here on out everyone who sees it sees the new version.

Making sure a task is listed as completed

If you're the person to whom a task has been assigned, you have the power to mark the task as completed. Use these steps to mark a task as complete:

1. **Click the name of the task, in the first column.**

2. **Click the Complete button.**

3. **Click OK.**

4. **Go out and celebrate.**

Commenting on a task

Add Comment... Sometimes you may have something to say about a task, even though you aren't its owner or aren't the person to whom it was assigned. You can say what you have to say by adding a comment to a task.

1. **Click the name of the task in the first column.**

2. **Click the Add Comment button.**

3. **Enter your suggestions or comments in the Add Comment field.**

4. **Click the OK button.**

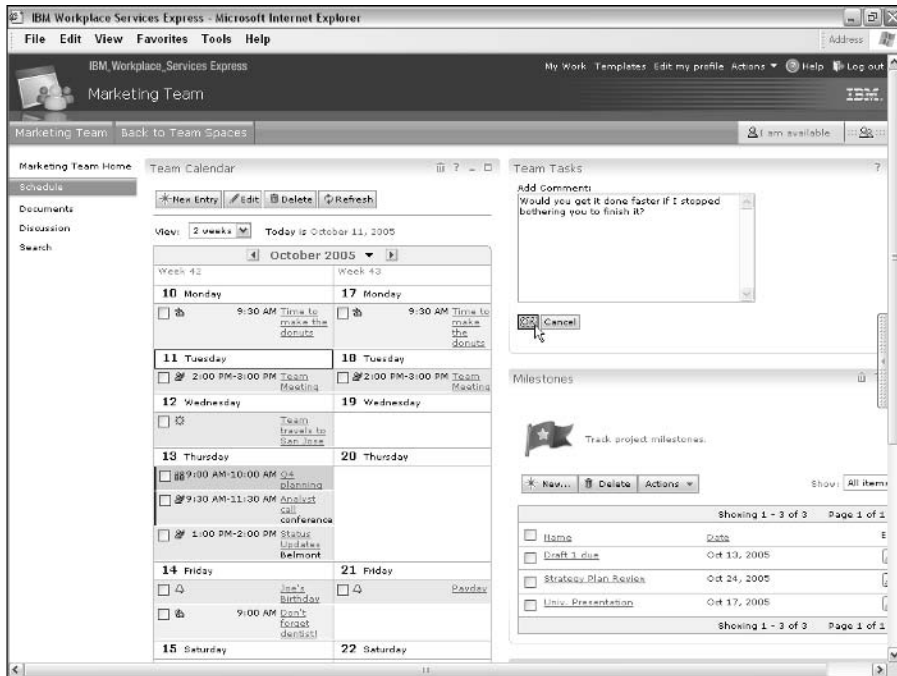Figure 7-10 shows how it looks when you add a comment to a task.

Figure 7-11:
Many team
spaces
include
a team
calendar.

Only include details you want the whole team to see.

✔ **Anniversary:** Anniversaries are items that appear on the date you spec-
ify, used to remind the team that an event has been commemorated.
Anniversaries automatically repeat, usually for ten years (you can
change that).

✔ **Reminder:** Reminders are just like anniversaries, but they appear on the
calendar at a specific time.

✔ **All Day Event:** You can identify how large blocks of time are being spent
(at one of those boring, all-day type meetings). Use this item to make
sure someone's assigned to bring the coffee.

Each type of calendar entry is distinguished on the calendar; all items show
up in different colors, and each type of entry has its own icon, too.

Changing the team calendar's view

The Team Calendar portlet always shows the month being displayed at the
top (for example, in Figure 7-11, it's October). You can use the buttons next to
the month to change what you see.

Click the Previous Month button to scroll into the past, and click the Month Forward button to move into the future.

To jump to a specific date, click the triangle next to the name of the month you're viewing and pick the date you want from the Date Picker, as shown in Figure 7-12.

TIP

You can always click the Today is link at the top to go back and view the calendar entries for the current date.

Several buttons appear at the top of the form. You can use them to change which days, weeks, or months are shown in the calendar. Use the team calendar's View menu to change the way the calendar is displayed — you can view the calendar by an entire month at a time, or two weeks, or one week, or just two days.

Figure 7-12:
Use the Date Picker to choose a particular date.

Date Picker

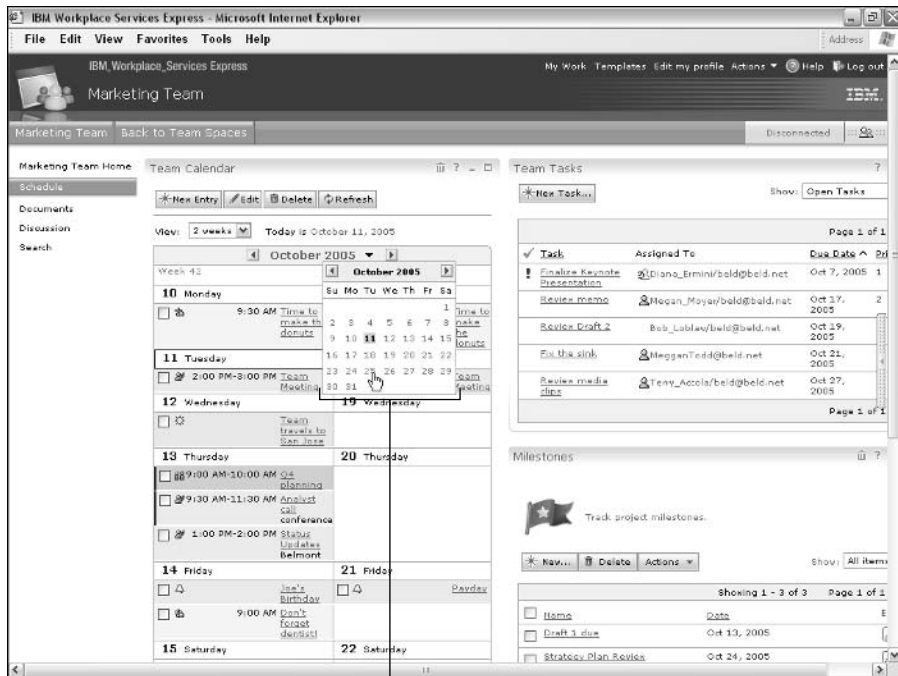### Entering an appointment in a team calendar

`Appointment ▼` Use the following steps to add a new appointment to a team calendar.

1. **Click the New Entry button.**

2. **Enter a brief description of the appointment in the Subject field.**

   What you enter in this field is displayed in the team calendar views, so brevity is a good thing; use the Details field at the bottom of the form if you have more on your mind.

3. **Use the When and Where fields to enter the starting and ending dates and times for the appointment, as well as its location.**

   An appointment's location can be as far away as Boston or as local as Conference Room B.

   Use the Time and Date Pickers, if you prefer, to choose the times and dates of the appointment instead of typing them.

4. **Use the Repeating Entry fields if the appointment will occur more than once.**

5. **Enter a more detailed description in the Details field if you desire.**

6. **Click Save.**

Entering a meeting in a team calendar

`Meeting ▼` Use the following steps to add a new meeting to a team calendar. Entering a meeting is just like entering an appointment, except that you can invite other people to join and attend your team meeting.

1. **Click the New Entry button.**

2. **Select Meeting from the Entry Type drop-down list.**

3. **Enter a brief description of the meeting in the Subject field.**

4. **Use the When and Where fields to enter the starting and ending dates and times for the meeting, as well as its location.**

5. **Use the Repeating Entry fields if the meeting will occur more than once.**

6. **Enter the names of the people who are invited to the meeting in the Required, Optional, and FYI fields.**

TIP

If you don't want to type the names of the people who are invited, use the Find Addresses button to search for and select names from the directory. Because this option prevents typos, you may want to get into the habit of always using the Find Addresses button. The only time you *can't* use this button is when the person you want to invite to the team is not a member of the team.

7. Enter a more detailed description in the Details field if you desire.

8. Click Save.

Figure 7-13 shows a sample Meeting form.

Everyone you include in an invitation to a meeting receives an invitation to the meeting via e-mail. From there, members can add the meeting to their calendars. If you reschedule or cancel a team meeting, the new time, date, or cancellation is automatically forwarded to your invitees.

REMEMBER

Unlike some calendar and scheduling systems, the IBM Workplace Services Express calendar can't conduct free-time searches to see when the invitees are available; also, WSE doesn't accept RSVP responses from the invitees.

Figure 7-13:
Meetings are posted to the invitees' personal calendars.

Entering an anniversary in a team calendar

Anniversary ▼ Use the following steps to add a new anniversary to a team calendar:

1. **Click the New Entry button.**

2. **Select Anniversary from the Entry Type drop-down list.**

3. **Enter a brief description of the anniversary in the Subject field.**

4. **Use the When and Where fields to enter the date of the first anniversary, as well as its location.**

5. **Use the Specify How Often to Repeat field to determine how often the anniversary appears on the team calendar. Use the Specify How Long to Repeat field to determine how far into the future and how many times the anniversary is entered in the calendar.**

6. **Enter a more detailed description in the Details field (optional).**

7. **Click Save.**

Entering a reminder in a team calendar

Reminder ▼ Entering a reminder in a team calendar is just like entering a new anniversary, except that a reminder also has a time associated with it. Reminders don't automatically repeat the way anniversaries do. Follow these steps:

1. **Click the New Entry button.**

2. **Select Reminder from the Entry Type drop-down list.**

3. **Enter a brief description of the reminder in the Subject field.**

4. **Use the When and Where fields to enter the starting and ending dates and times for the reminder, as well as its location.**

5. **Use the Repeating Entry fields if the reminder will occur more than once.**

6. **Enter a more detailed description in the Details field (optional).**

7. **Click the Save button.**

Entering an all day event in a team calendar

All day event ▼ Use the following steps to add a new all day event:

1. **Click the New Entry button.**

2. **Select All Day Event from the Entry Type drop-down list.**

3. **Enter a brief description in the Subject field.**

4. **Use the When and Where fields to enter the starting and ending dates and times for the event, as well as its location.**

5. **Use the Repeating Entry fields if the event will occur more than once.**

6. **Enter a more detailed description in the Details field (optional).**

7. **Click the Save button.**

Editing a team calendar item

Any member of a team can edit an item on the team calendar by opening the item and clicking the Edit button. Alternatively, you can select the item in the calendar's Summary view and click the Edit button.

If you edit a meeting by changing the time, date, or invitee list (or all three), IBM Workplace Services Express sends the appropriate e-mail message to the appropriate people to let them know about the change.

Cancelling a team calendar item

Deleting an item on a team calendar is just like deleting any other item on any other form; you open the item and click the Delete button. Alternatively, you can select the item in the calendar's Summary view and click the Delete button.

If the item you delete is a team meeting, the meeting's invitees receive an automatically generated e-mail telling them that they don't have to come to the meeting anymore.

Chapter 8

Holding and Managing Discussions

. . . .

In This Chapter

▶ Holding and managing discussions

▶ Posting and editing posts of your own

▶ Keeping it all organized

▶ Using Search to see what the team's been talking about

. . . .

*W*ithout discussions, IBM Workplace Services Express would just be a dumping ground for documents. One of the activities that is important to WSE, and that sets WSE apart from other kinds of software, is the ability to hold discussions. A discussion area gives you and your team a venue for, well, talking about things. Not every team space has a discussion area, of course, but many do.

In fact, depending upon how your team or project is organized, you may have more than one discussion area. For example, say you're working on a massive project with many subteams, each of which is assigned to work on very specific subprojects. Ultimately these subteams need to report to the larger team. What better way to keep each other informed as they work toward completing their piece of the project than to use discussions?

As you can see in this chapter, WSE has tools for making your discussions as organized, or as disorganized, as you want to them to be. In this chapter, you also discover how to create a discussion forum, how to manage discussion forums and topics, and most important, how to chime in on the conversation yourself.

Diving In to Discussions

Discussions give you and your team a fairly structured place to talk about any topic related to your team or project. Discussions can be rigid affairs, with specific areas dedicated to the discussion of very specific topics, or they can be more freewheeling and loosey-goosey, where your team is just turned loose to discuss whatever issue they want — and however they want.

Discussions are, by their very nature, supposed to be highly interactive, with lots of people contributing ideas, posting topics, adding replies, and so on. You set up a new discussion because you anticipate that the members of a team need a special venue for collectively arriving at a decision or making a collaborative recommendation.

REMEMBER

If, on the other hand, you just need a place for your team to post and be able to find things, discussions aren't necessarily the right answer — that sounds a lot more like a time to use a document library, perhaps, or the Announcements form.

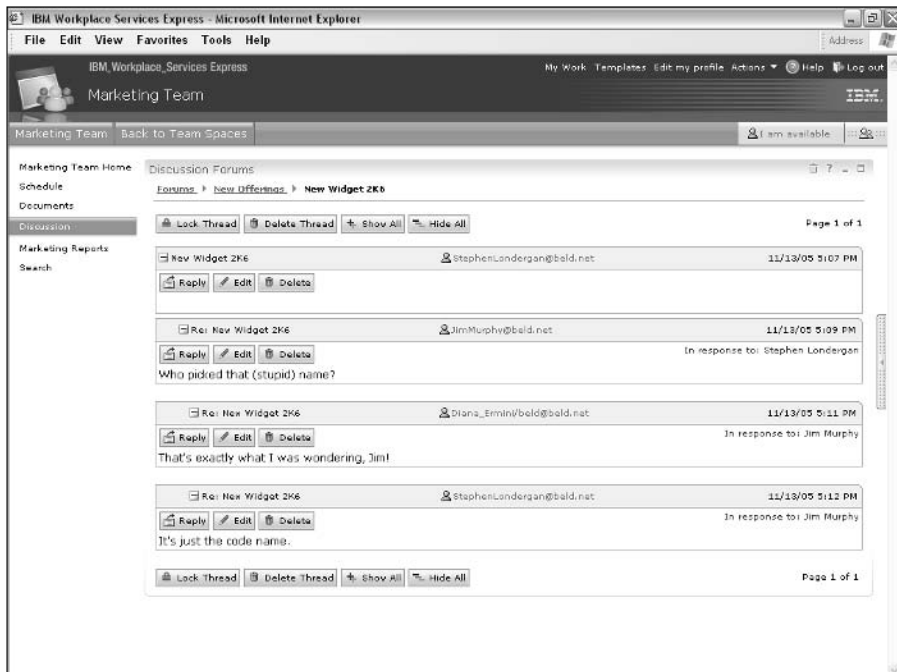Figure 8-1 shows a sample discussion, where a team is having a go-around about a new product name.

Figure 8-1: Discussions give teams a place to talk about just about any project-related topic.

Understanding how discussions are organized

Because a team may have any number of topics to discuss, WSE provides a few different ways of organizing them, so that team members can easily find the topic or discussion that they need to read up on or contribute to.

Discussions are organized hierarchically. Here's how the hierarchy breaks down, from the top to the bottom:

- **Forum:** At the top of the hierarchy are forums (or is it *fora,* or maybe *fori?*). A team space can have any number of these forums.
- **Threads:** Forums in turn contain *threads.* A thread is a collection of posts related to a particular idea or item that the team needs to discuss.
- **Topics:** Threads are made up of a series of *topics.* A topic is just a page that some member of the team posts to get the conversational ball rolling.
- **Posts:** People who are participating in a discussion can either post *replies* of their own, or submit their own topics. Any contribution at this level is officially called a *post.*

A team space can have a discussion area. That discussion area can have any number of discussion forums, and each forum can have any number of threads. Each thread consists of one post, which is called a topic, and a series of related posts from other people, which are called replies.

Using and Managing Discussions

Discussions are actually quite easy to set up, use, and manage. Remember that not all team spaces have discussions, and the ones that you do encounter may very well only have one big forum with a lot of posts in it. As a great man once said "Just because you *can,* doesn't mean you *should,*" and that sage advice definitely applies to how much time you can/should spend worrying about how to organize WSE discussions. Having six large forums and an infinite number of threads is simply overkill for a team made up of ten people.

Working with forums

Figure 8-2 shows a team space discussion area, which includes two sample discussion forums: Planning for 2006 events and RFP responses. As you can

see in the figure, this list of forums works much the same way as other WSE tools (like the Team Spaces Catalog, for example, which I describe in Chapter 6). It is made up of columns of information about the discussion forums, including the forum's title, the number of topics and posts the forum contains, and the date of the most recent post in the forum.

TIP

You can sort the list of forums by clicking the <u>Forum</u> link at the top of the first column in the list of forums. The little arrow next to the word Forum indicates whether the list is being presented to you in ascending or descending order.

At the top of the list of forums are five buttons that are used to interact with the forums. They are, from left to right:

- ✓ **New Forum:** Adds a new forum to the discussion area in the team space.
- ✓ **Lock Forum:** Prevents the team from adding any new posts to a forum. This is a useful tool when the team has been given a deadline to submit posts for a topic that is time sensitive. The Lock Forum button makes very clear to team members that they've missed the boat for expressing dissatisfaction with the new controversial policy you've enacted, and that they must now commence calling you the Venerable, Honorable Mr. (or Ms.) Cool when they bow to kiss your ring.
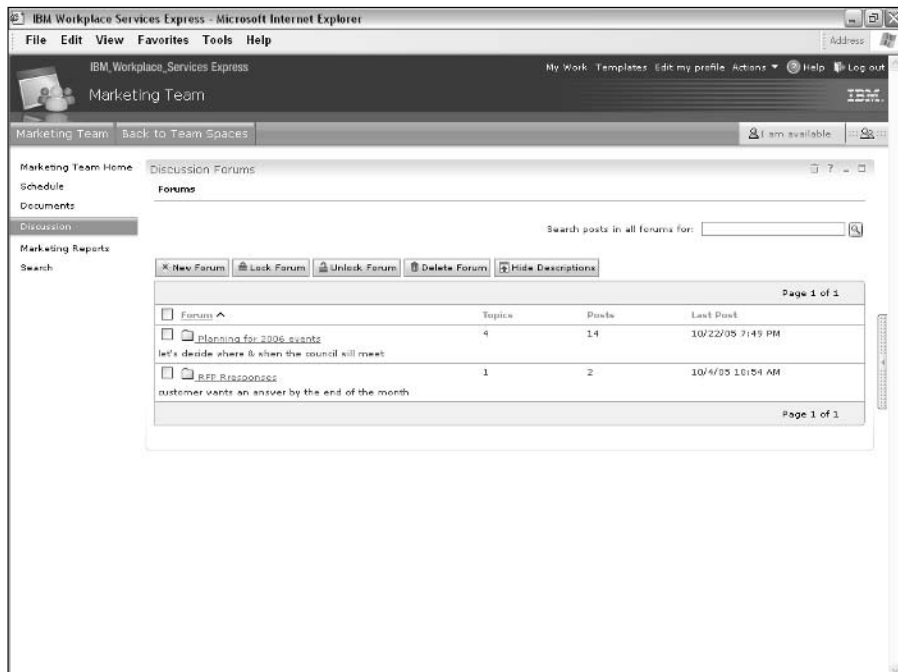

Figure 8-2:
Use the discussion forum list to enter a forum, and, if you have access, create a new one.

✔ **Unlock Forum:** Switches a forum that you have previously locked, so that it is open for business again, and so that your team can add new topics and posts to it.

✔ **Delete Forum:** Removes a forum, along with all accompanying threads and posts, forever and ever. When you delete a forum, it's gone for good — you and your team can't ever see its contents again.

✔ **Hide Descriptions:** Hides the description line that appears under the name of each discussion forum. This button is useful if you have a particularly long list of forums.

Creating a new forum

Use these simple steps to create a new discussion forum:
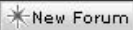
| ✳ New Forum |

1. Click the New Forum button.

   The New Forum form appears.

2. Enter the name (required) and description (optional) for the new forum.

3. Click OK.

When you click the OK button, the new forum is created and opened for you automatically. Not surprisingly, the new forum is empty, so the first thing you'll probably want to do is add a new topic.

Editing a discussion forum

Use the following steps if you want to rename a forum or change its description:

1. Click the name of the forum you want to edit.

   The forum's topics are displayed.

| ✎ Edit Forum |

2. Click the Edit Forum button.

   The forum's properties form is displayed.

3. Enter the new name and/or description for the forum.

4. Click OK.

TIP

You can also use the Properties form to lock the forum, or unlock it, as appropriate.

Entering a discussion forum

You can easily enter a forum — this is what you do when you want to dig a little deeper and actually read the posts in a particular forum. Assuming you have the right level of access and the forum isn't locked, you can post your own topics and replies, too.

Just click the name of the forum in the list of forums. The forum list goes away and is replaced by the list of topics and posts in the forum you selected.

Check out the following section, "Working with topics and threads," to find out how to navigate the posts.

Working with topics and threads

Figure 8-3 shows the topics in the first of our sample forums. As you can see in the figure, this forum's title is New Offerings; note that the list of topics also tells you who posted the topic in the first place, how many replies are in the given topic or thread, and when the last post was made.

As the figure also shows, this particular forum contains three topics, which have already been posted by members of the team.

Much like the list of forums we saw in the previous section, you can use the six buttons at the top of the screen to work with the topics in the forum:

- ✔ **New Topic:** Adds a new topic to the forum, which your teammates can read and to which your teammates can post replies.

- ✔ **Lock Thread:** Shuts a thread down, so that your team can't add any new topics or replies. You and the team can still read the posts and replies in a locked thread, you just can't add any news ones.

- ✔ **Unlock Thread:** Unlocks a thread that you have previously locked, so that your team can start adding new posts and replies to it again.

- ✔ **Delete Thread:** Removes the thread, and all of the posts in the thread. After you delete a thread and its posts, it can't be recovered or retrieved.

- ✔ **Lock Forum:** Prevents the team from adding any new posts to the entire forum.

- ✔ **Edit Forum:** Enables you to change a forum's title or description.

Notice the Forums link at the top of Figure 8-3. You use this link to exit the forum you're in and return to the list of all the forums in the team space's discussion area.
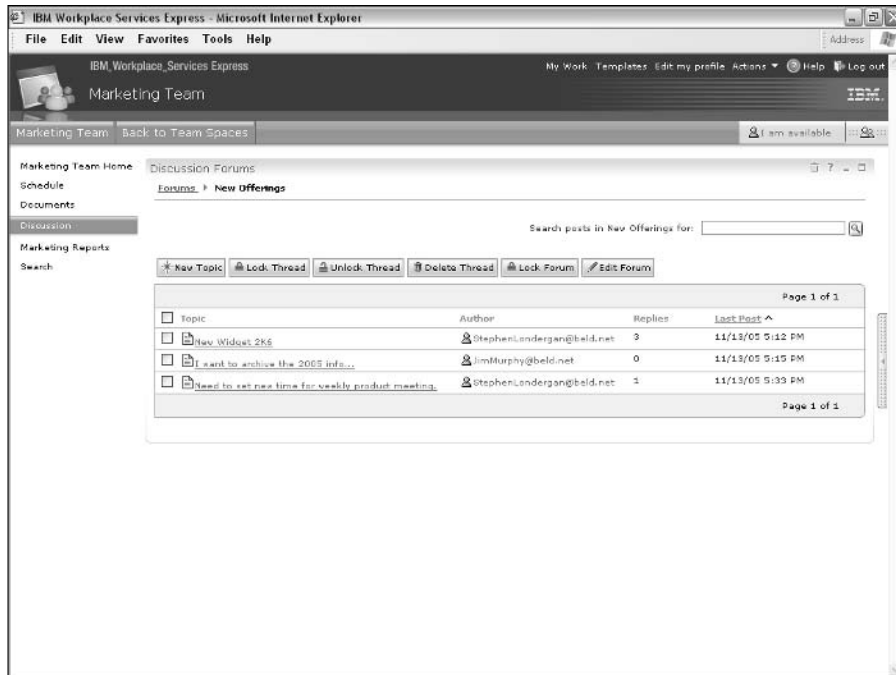
Figure 8-3:
When you
click the
name of a
forum, a list
of topics
and posts in
that forum
appears.

Posting a new topic in a thread

Use these three simple steps to add a new topic to a discussion forum:

1. **Click the New Topic button.**

   The New Topic form appears.

2. **Enter the topic's description and body in the New Topic form.**

3. **Click OK.**

When you click the OK button, the new topic is added to the forum and is opened for you automatically, as you can see in Figure 8-4.

Click the appropriate buttons for your new topic. Although you *could* use the Reply button to reply to the topic you just created, that would be a little like talking to yourself. In most cases, you'll want to instead click the link at the top of the screen to return to the list of topics. Likewise, you probably don't want to start out by locking a topic that you've just created.
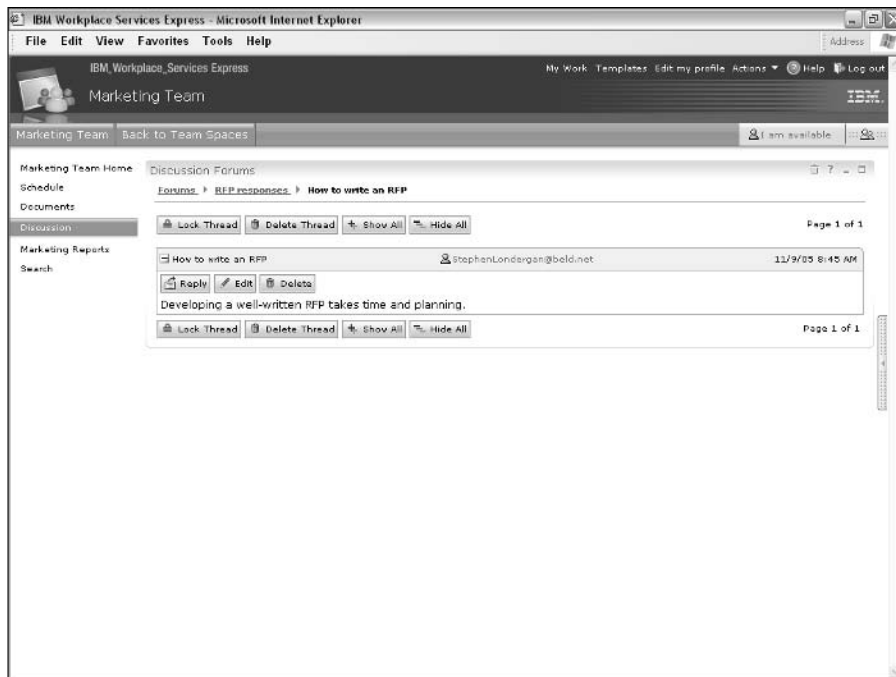
Reading topics in a thread

To open a given thread and see all of the posts in that thread, click the thread you're interested in and then click the topic name in the topic list. See Figure 8-5.

Figure 8-5 shows a sample discussion thread, one that has two posts from different members of the team. If others on the team reply to these posts, their replies are automatically indented, to help you make sense of who is replying to what.

Use the following steps to dig down and see all of the posts in a given topic/thread:

1. **Click the name of the thread you want to read.**

   The forum's topics are displayed.

2. **Click the Edit Forum button.**

   The forum's properties form is displayed.

3. **Enter the new name for the forum.**
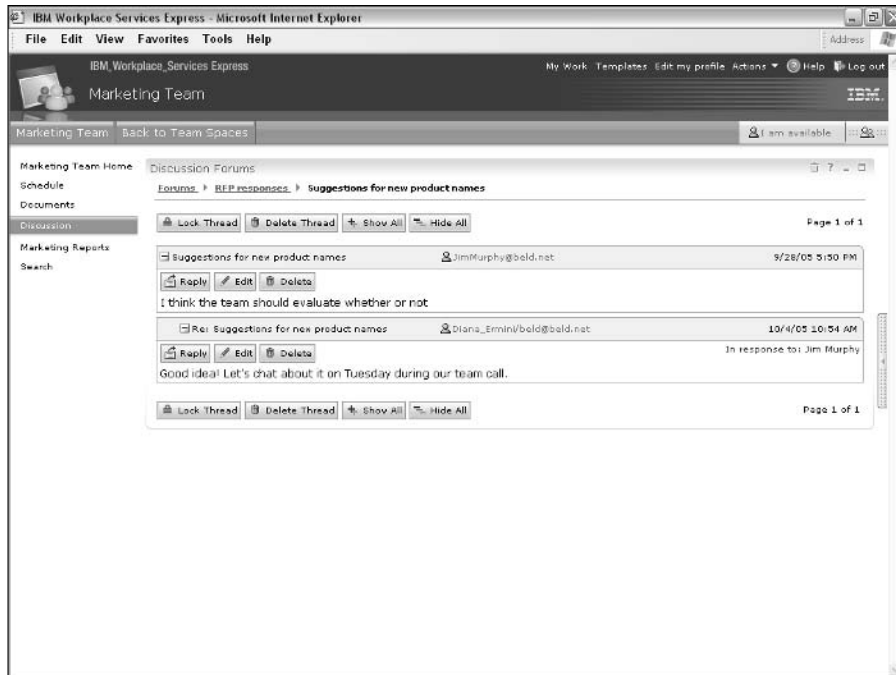
   You can also add a description.

4. **Click OK.**

Figure 8-5:
Discussions
can include
multiple
posts from
team
members.

Making sense of the madness: Expanding and collapsing threads

Because discussion threads can grow to be long and unruly, WSE has a way to help you find your way through them. When you have multiple posts in a thread, you see either a + (plus sign) or a – (minus) sign next to the thread; click the + or – sign, to expand the post to show all of its contents or minimize it to show just its description. Clicking these symbols shows or hides a post's body.

You can also use the Show All and Hide All buttons to expand and collapse the entire thread. Expanding and collapsing threads can be handy, especially if you're working with a particularly long thread with multiple posts, and you need to hide some of the detail in order to make sense of the whole mess.

Editing a topic or post

In most cases, you can only edit the topics and posts that you yourself posted. Assuming you have the access rights, you can use the following steps to edit a topic or post:

1. **Click the Edit button for the post you want to change.**

   The discussion forum is displayed.

2. **Make your change to the topic or post's subject and/or body.**

3. **Click OK.**

Replying to a post

Replying to a post is a lot like adding a new topic, except that your reply is automatically displayed in the thread, indented underneath the post to which you replied.

TIP

Be sure you click the correct Reply button, especially in a long and complicated thread that has a lot of posts. Did you ever hear that joke about the three most important things in real estate? (Location, location, location.) The same rule applies to clicking the Reply button in a WSE discussion thread — you can easily reply to the wrong post.

Use the following steps to post your own reply:

1. **Click the Reply button on the post you're replying to.**

   The Reply form is displayed.

2. **Enter your comments in the Body field.**

3. **Click OK.**

TIP

When you read a thread, WSE always tells you whether the authors of individual posts are online and available for a chat (as I discuss in Chapter 5). If you have a quick question for the author of a post, and it's not necessarily something the whole team needs to read, click the person's name to start a chat session. If you have a question or need clarification, sending an IM is always the fastest way to get your answer.

Searching through Discussion Threads

You can search a discussion thread for a particular word or phrase. This is particularly useful if your team has several discussions in operation, or when you have long discussions with tons of posts and replies.

Keeping discussions in perspective

Discussions are certainly important, and one of the most interesting methods that WSE utilizes technology to help keep teams collaborating. That said, you may not use the discussions described in this chapter as much as you think. (I know what you're thinking: Now he tells me?!) Although knowing about discussion forums is important, and although (in the interests of full disclosure) including information about discussions in this book is important, chat rooms are often a better way to keep in touch and make group decisions for a couple of reasons:

✔ Chat rooms are a lot like discussion forums, in that they offer the team a place to go and have a free-for-all discussion about just about any topic. And they're also like discussions because the comments and messages from the team are automatically stored in the chat room transcript's archive. The chat goes on and on; any member can

come along and read or contribute to the chat at any time. (All of this chat room business is covered, ad nauseum, in Chapter 9.)

✔ Chat rooms offer a level of immediacy that discussions do not. As Chapter 9 shows, if two, three, or four people are working together in a chat room, they are collaborating in real time.

One down side to chat rooms is that they don't offer the level of organization that discussion areas do; for example, you can't organize a chat room discussion into topics and forums the way you can with discussion forums. In my humble opinion, however, the immediacy of a chat room discussion trumps the organization offered by a discussion forum. I guess which of these conversation methods you find most effective depends on the team's purpose, as well as the kind of discussions the team needs to have.

Or say you haven't been keeping up with a particular forum or thread, but you need to get up to speed in time for your meeting in 15 minutes; searching is a great way to see what your team has had to say on a particular word, phrase, or topic.

As you can see in Figures 8-2 and 8-3, both the forum list and the topic list pages have a search field in the upper-right corner. When you want to find a particular word or phrase, enter it in the Search For field, and click the Search button.

As you can see in Figure 8-6, WSE shows you all of the posts that match your search terms — assuming there are any.
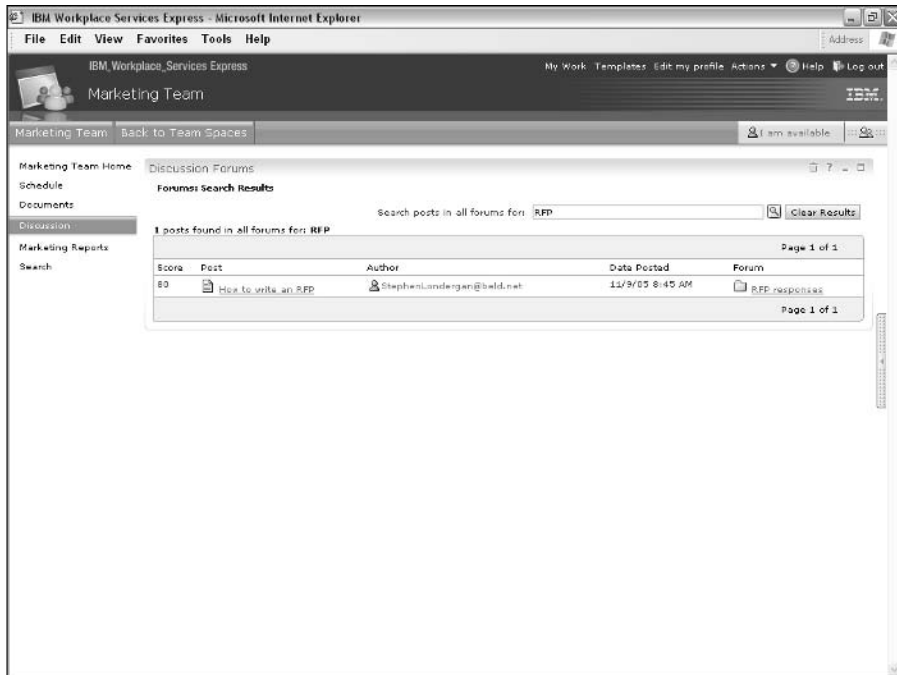
Figure 8-6:
Use the
Search
button to
see whether
your team
has been
discussing a
particular
word or
phrase.

Chapter 9

Chat Rooms and Why They're Handy

*C*hat rooms are a special combination of instant messaging and discussion forums. They give team members a way to work together, in real time; whoever is with you in a chat room sees what you type, as soon as you type it. Given this immediacy, chat rooms are the best way to work when several people need to come together to talk about a particular topic or idea, reach a decision, or get some questions answered — fast.

In this chapter, I show you where to find chat rooms, how you participate in the chats, how to find out what the team was up to when you weren't around, and how you can use and manage chat archives.

Getting Chat Room Basics

Chat room features are among the most interesting and distinctive facets of IBM Workplace Services Express; they embody the difference between dynamic team collaboration and ho-hum, relatively static document libraries and discussion databases.

The basic idea behind chat rooms is that you and any number of your teammates can come together to collaborate in real time. In this regard, using a chat room is similar to instant messaging, because the chat room conversations you have with your teammates happen instantly. Just like an IM chat,

when you type a message in a chat room, all of the participants in the chat room can see it and can respond.

What makes chat rooms particularly interesting and useful is that the conversation that you have is archived. A member of the team who wasn't part of the chat can still come to the chat room after the fact, and see what was being talked about.

And, in most cases, the straggler can continue the conversation, because you can post a message to a chat room even if no one else is around, sort of like leaving a note or a question for the next person or group of people who visit the chat room. Because every message posted to a chat room is automatically time stamped and every participant is identified by name, you can always tell who said what — and when.

Because WSE chat transcripts are automatically saved, they live on in the team space long after the chat is over. For example, if one of your teammates performs a search for RFPs, say three weeks after you had a chat about RFPs, the teammate gets a hit that leads to your chat archive (assuming that the term *RFP* occurred in your chat, of course, and assuming that the teammate has access rights to see your chat). Figure 9-1 shows a sample chat room.

Figure 9-1:
Chat rooms enable you to work in real time, and can also preserve your discussions for later use.
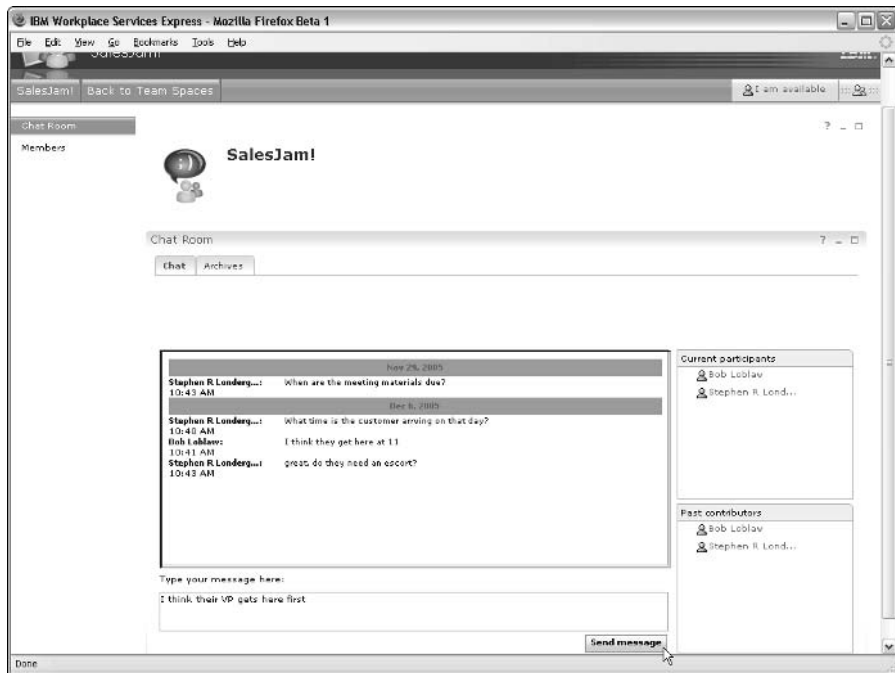
Chat rooms are usually open for business, 'round the clock. Thinking metaphorically, using a chat room is a lot like having focused conversations around the water cooler; sometimes you'll find a lot of people there, and sometimes you won't, but whenever people are around, they'll be talking about whatever theme the chat room was set up to address.

To extend the water cooler metaphor just a bit, imagine a big, magic bulletin board on the wall behind the water cooler, which auto-magically records all of the conversations that transpire there. That way, someone who visits at, say, 11:00 a.m., can see what the rest of the people were talking about at 10:00 a.m. This magic bulletin board is also the way you leave a comment or question, in case there's no one else there when you arrive.

Understanding the important differences between chats and IM

What transpires in a chat room is a lot like instant messaging — it's certainly instant, for example. However, a few key differences between instant messaging and chat rooms are worth considering:

- ✔ **Chat rooms become part of your team's history:** Unlike instant message chats, chat rooms automatically preserve and display previous conversations. If you have an IM chat with someone, the record of the conversation disappears when you close the chat window. There's no way to archive it.

- ✔ **Chat rooms are searchable:** You can search contents of chats, both in the chat room itself, and when you search in an entire team space or all of WSE. You can quickly find a conversation about a particular topic, after the fact, as long as the conversation happened in a chat room and you know which terms to look for. Instant messaging conversations, on the other hand, aren't recorded, and so you can't search them after the conversation has concluded.

- ✔ **Chat rooms have a wider audience:** The conversations that you have via IM are, by their nature, fairly private affairs, because the contents are only visible to the two or three people participating in the IM session, and because the remarks they make there are only visible to the person for as long as the participants have their chat windows open. Chats are viewable by the entire team.

If you've got something bad to say about your boss (or anyone on the team or at your company), you're better off saying nothing (or at the very least making your comments in an instant message); avoid the permanence of the a chat room.

Understanding the important differences between chats and discussion forums

What transpires in a chat room is also a lot like a discussion area, because the chat room is a place for people to come together, collaborate, and interact with each other. But there's one key difference between discussion areas and chat rooms that is worth getting down in black and white.

The conversations in a chat room occur mostly in real time; whatever you type is seen by others in the chat room as soon as you type it. In discussion forums, the expectation is that posts don't need to be read immediately.

Some ideas for how to use a chat room

Chat rooms give you a whole new way to work with your team. Here are some ideas about how you might use a chat room to foster your team's collaboration:

- **Hold a team meeting:** Set up a regularly scheduled (weekly, perhaps) online meeting for members of the team where they can quickly come together to check in and provide status updates. Chat rooms shouldn't replace conference calls and face-to-face meetings, but sometimes a quick chat session with five or ten members of your team is just the ticket. Don't diss this idea until you've tried it. It's got one perk that no face-to-face conversation can manage — an instant transcript of what everyone had to say.

- **Have a caucus:** Maybe a subteam or subcommittee needs to get a decision made? A chat room is a great place for a smaller bunch of your teammates to come together and have a discussion or make a decision.

- **Hold online office hours:** If you're a team leader or project manager, how cool would it be if your team knew that you will always be online and ready to chat in a chat room at a preset time (say, every Tuesday at 10:00 a.m.)? Because chat room conversations are automatically recorded and archived for your team, and assuming the conversations you have with your minions are for the greater good of the entire team, chat rooms are a good way to get the word out.

- **Have an ask-the-expert session:** If you (or a member of the team) have expertise in a particular area or on a particular part of the project, help out your team by availing yourself to their questions at set times. Because the chat room archives the discussion, members of the team can review or search the conversation to get quick answers. If you're the expert, using a chat room in this manner may even mean that people bug you less often (but don't hold your breath on that one).

One man's opinion: Is a conversation best held in a chat room, discussion area, or IM?

I'm a big fan of chat rooms, and that's the first place I look when I need to discuss something with the members of my teams. I like the fact that chat rooms enable us to work together in real time, and preserve the conversation for people who can't be there live. Because of the highly interactive and versatile nature of a chat room conversation, things just get done faster and questions get answered more quickly.

IM is a close second, and I guarantee that if you don't already use IM for work purposes it will become one of your frequently used WSE tools, too. The biggest benefit of IM versus chats is the privacy that IM affords; your IM exchanges are just between you and the person(s) with whom you're conversing. When what you need to talk about is for a smaller and more limited audience, IM is the answer.

Discussion forums are, in my experience, anyway, of limited value. Although sometimes discussion forums work well for a project (say you need a place to post discussion items and questions so that people can read and respond at their leisure), I think discussion forums are too passive and too slow paced. You and your teammates have to remember to go to the thread to see whether anything new has been added to the conversation, and you have to wait for replies.

Using Chat Rooms

Using a chat room is as painless an experience as you'll have in WSE. The following sections give you everything you need to know, from entering into a chat to searching chat archives and managing chat room members.

Finding and entering a chat room

Some chat rooms are part of a team space, and other chat rooms are listed in the Team Spaces Catalog. If the chat room is part of a team space, you access the chat room by clicking its name in the team space menu. If, on the other hand, the team space is more of a stand-alone space, you access it by clicking the name of the chat room in the Team Spaces Catalog.

Regardless of the chat room's name, you can tell which of the items in the Team Spaces Catalog are chat rooms by looking in the Template column of the Team Spaces Catalog.

Figure 9-2 shows a sample Team Spaces Catalog, and as you can see, the SalesJam entry uses the Chat Room template.
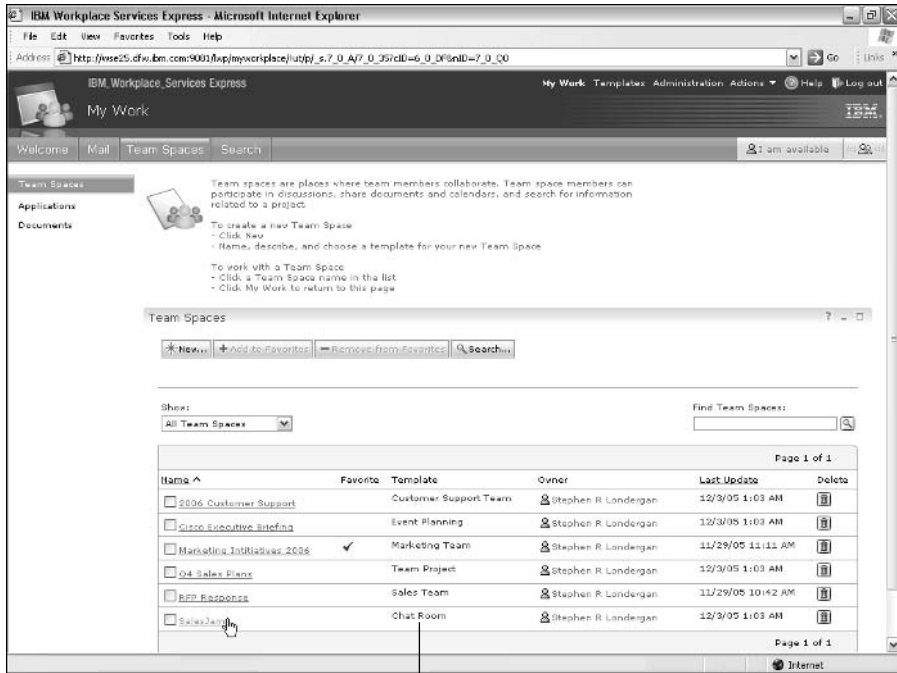
Figure 9-2:
Click the
name of the
chat room in
the Team
Spaces
Catalog to
open it.

A sure sign that this is a chat room.

A chat room is made up of several parts, including the chat transcript, the Type Your Message Here field, and the Current Participants and Past Contributors lists.

The chat transcript shows you all of the messages that are part of the discussion; you can use the scroll bars as appropriate to see what the team's been talking about. Don't forget that a chat room is open for business 24/7, so what you see in the chat transcript could be from earlier today or even last week. Fortunately, WSE puts a time stamp on each entry so that you know the timing of chat entries. Figure 9-3 shows a chat room in action.

The Current Participants list alphabetically lists which of your teammates is currently participating in the chat session.

TIP

If a member has posted in the past, he or she is only noted as a current participant if he or she is in the chat room at the moment. Likewise, everyone who is in the chat room is listed as a participant, even those participants who are *lurking* (reading along but offering no comments of their own). In the Current Participants list, you may also notice a little hand icon next to the name of the people as they are typing messages.

Figure 9-3:
Chat rooms give your team an innovative way to work together in real time.
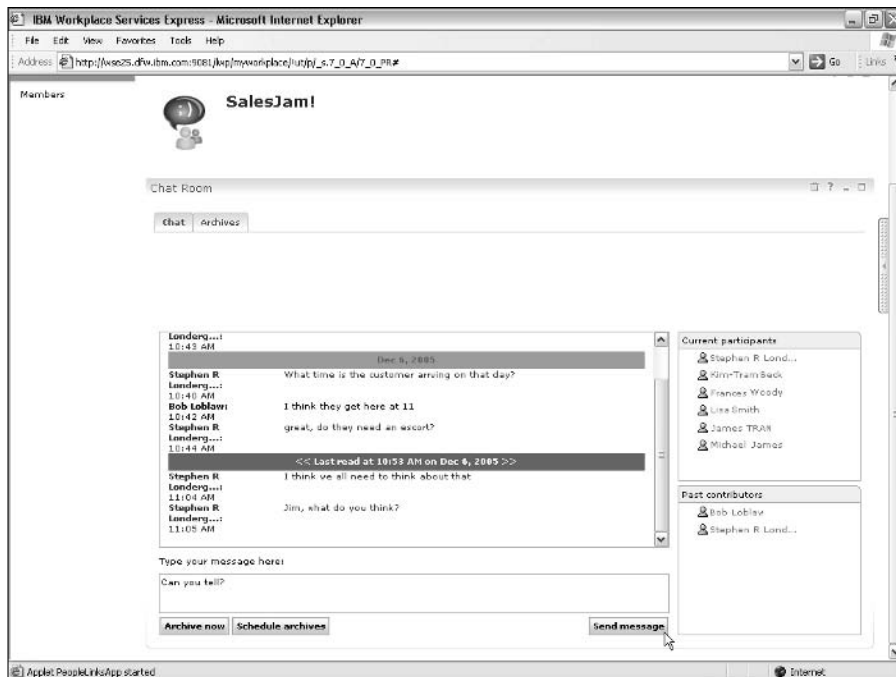
Sometimes, when lots of people are in a chat room, the conversation flows very quickly. Other times, when fewer people are present, the conversation lags. If you visit a chat room looking for someone to answer a question for you, and there's no one there but you, don't feel lonely, and don't despair; you should still type your question. The next person to visit the chat room will respond.

Typing a message

Typing a message in a chat room is easy; to type a message and post it to a chat room, you follow these steps:

1. **Type what you want to say in the Type Your Message Here field.**

   No one can see what you type until you click the Send Message button or press the Enter key on your keyboard, so you can correct mistakes, or change your wording.

2. **Click the Send Message button or press Enter.**

   As soon as you click the Send Message button, what you type is displayed in the chat transcript; anyone with access to the chat room can see what you typed.

TIP

Just as in an IM exchange, if you type a Web page address (like `www.dummies.com`) in a chat room, your teammates can automatically click it to visit that Web page.

Use a chat archive to keep things fresh

When you archive old chats, you keep things fresh (archiving clears the Chat Transcript window) and provide a way to make what's transpired in a chat room searchable. If you want to archive chat room contents regularly (say once a week), you can set up automated archives (see "Scheduling archives," later in this chapter). Saved archives are saved as part of the chat room on the WSE server.

You can also use the Archive Now button to archive the contents of a chat session.

Archive now When you click the Archive Now button, you see the Archive Now form, as shown in Figure 9-4.
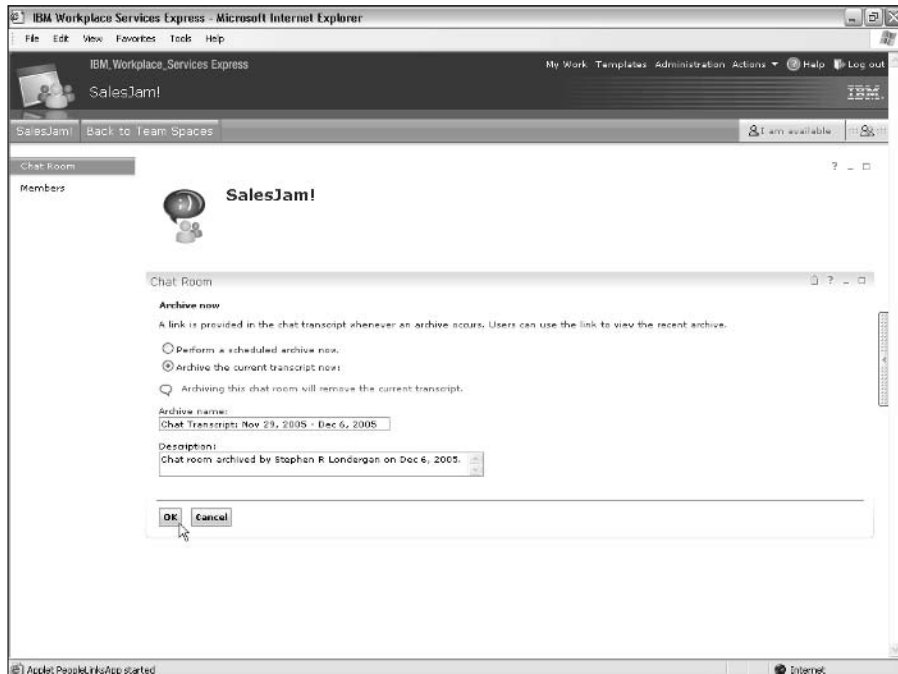
Figure 9-4: Archive a chat room periodically to clean it up and store its contents.

Follow these simple steps to archive a chat:

1. **Click the Archive the Current Transcript Now check box.**

   I discuss scheduled archives later in this chapter.

2. **Enter the name for the chat transcript in the Archive Name field.**

   Adding a name is optional, but it can come in handy, especially if the chat room has a lot of traffic. Your transcript name could be by date, such as *chat archives, December 10 through 17,* or by topic, such as *Discussion about using the new phone system.*

3. **Enter a description about the content of the transcript you're archiving in the Description field.**

   Adding a description is optional.

4. **Click OK.**

When you archive a chat, two things happen:

- ✔ The entire contents of the chat transcript are removed.
- ✔ Those same contents are saved in a chat archive document, for your (and your team's) later viewing and searching pleasure.

As far as space is concerned, you could run WSE forever and ever without archiving a single chat session and probably be okay; however, catastrophic system crashes happen all the time for no good reason, so archiving chat transcripts on a semi-regular basis is a good idea. Even if you don't need the contents of a chat transcript saved, archiving is still a good idea because you can clear the Chat Transcript window and let a new conversation start from scratch.

Scheduling archives

Setting up a scheduled archive is a good way to keep your chat room lean and mean without having to remember to manually click the Archive Now button (as I describe in the previous section). If you have a chat room that sees a lot of visitors and conversations, having the room's contents automatically archived is doubly important.

Figure 9-5 shows the Scheduling Archives form that appears when you click the Schedule Archives button.

Follow these easy steps using the Scheduling Archives form to schedule auto-
matic, regular archives:

1. **Click the Automatically Archive Older Messages in the Chat
   Transcript check box.**

2. **Use the Archive Messages Older Than list to determine how much of
   the chat transcript you want removed from the Chat Transcript
   window each time the archive is run.**

   For example, you can set the archive to save messages that are older
   than a week; all the messages that were typed within a week remain in
   the Chat Transcript window, dropping into the archive day by day.

3. **Use the Perform This Archive list to determine how often, and at what
   time, the automatic archive will perform its magic.**

   Your choices include weekly, every two weeks, monthly, and daily.

4. **Click OK.**

Using and searching a chat archive

Everyone who has access to the chat room can use the archives to view previous conversations. Click the Archives tab at the top of the chat room to open a list of archives.

Figure 9-6 shows a chat archive list; each archive name is a link (such as <u>Chat Transcript March 23</u>) that you can click to view its contents.

TIP

If you have the correct level of access, you can click the trash can icon next to a chat archive to delete it. But be careful, because when you delete a chat archive, it's gone forever.

You can also use the Search Chat Archives For field to search for and display only the archives that match the term you're interested in. The search facility in a chat room is not the only way to locate a particular chat discussion; as I show you in Chapter 16, the wider-scope searches that the main WSE search facility performs also search chat archives.

Figure 9-6:
Use the chat archives list to view and search old chat room transcripts.

Managing members

If your chat room is part of a team space, the people who can participate in chats and read and search chat archives are all the members of the team space.

If, on the other hand, your chat room is a stand-alone application, use the Members button on the left side of the screen to manage precisely who can come to your little chat party.

Managing the member list for a chat room is exactly the same as managing the member list for a team space. You have to have the right access role.

Part IV
Sharing and Safeguarding Documents

The 5th Wave   By Rich Tennant

"Our automated response policy to a large, company-wide data crash is to notify management, back up existing data, and sell 90% of my shares in the company."

In this part . . .

WSE users come from all over the world, and the teams and projects that WSE is used for are as varied as the contestants on *American Idol*.

But one thing that all teams seem to have is common is the number of documents, and content in general, they produce. Some teams turn out Microsoft Word documents by the truck load! Whether you use Microsoft Office or not, it's a pretty safe bet that you, your team, and the projects you work on will need places to store and produce them.

So, then, we have Part IV, which is focused on exactly that: how you use WSE to store, organize, produce, and collaborate on content — like documents, spreadsheets, presentations, and just about anything else you can think of.

Chapter 10

Introducing Document Libraries

. . . .

. . . .

*T*ake a look at your desk right now. Is it strewn with papers? Yeah, that's what I thought. Document management (sometimes referred to as *content management)* is one of the things almost all people (and certainly all teams) have to deal with; thus, document management is built in to IBM Workplace Services Express.

No matter where documents come from, or what software was used to create them, the WSE document libraries help extend your software investments and intellectual capital. Whether you just need a place to put documents so your team has access to them, or you intend to use WSE in a more collabora- tive way so that people can work together to produce new documents, WSE has great document management features that are ready, willing, and able to do what you need them to do.

In this chapter, I introduce document management, discuss some of the ways document libraries can streamline your content management, and get you started with a new WSE document library.

Introducing Document Management

Document management has an entire arm of the software industry devoted to it; software vendors (including IBM) sell very large, complex, and expensive document management systems that can be used to run an entire enterprise.

The aspirations of WSE document management are more humble; the docu- ment management facilities WSE offers are, as you'd probably guess, focused on the needs of teams and projects (as opposed to an entire conglomerate).

In general, companies and organizations use document management in two scenarios: *content publishing,* in which the document management system is used as a library or reference system of sorts, and *content production,* in which the system facilitates the creation of new content, files, and documents. WSE uses a little of both.

Using document management for reference

Many companies and organizations can benefit from online content libraries, which may contain policies and procedures, user manuals, design specifications, presentations, templates, auditing tools, and more. These are fairly common uses for a document management system, and tasks to which WSE is particularly well suited.

Keeping such materials in an online document library in WSE has many benefits, including

- ✔ **Consistency:** Because all the important information is maintained in the same place, document libraries are great for keeping everyone on the same page (pardon the pun). Anyone who needs to get information from the horse's mouth, so to speak, knows that the official, approved policy guide, manual, or what have you is available in the document library. No more will you hear anyone say, "Gee, I didn't know that!"

- ✔ **Reference:** Most companies and organizations have policies and procedures that every employee is supposed to know; some companies even certify that employees have reviewed these policies. From a team perspective, there may be situations where the design specification, rules of engagement, or even just simple, informal instructions on how to use the fax machine are stored in a WSE document library, for all to see.

- ✔ **Best practices:** A common use for document libraries is to store guidelines and instructions on how to perform a job. Imagine you're a new consultant, just hired at one of the Big Five accounting companies — wouldn't a document library full of best practices, as well as a formal job description, make your transition to that new job easier?

- ✔ **Reduced, more efficient storage:** Twenty years ago, a stroll through most businesses revealed entire bookshelves filled with three-ring binders, which were stuffed to the gills with policies and procedures, manuals, and the like. The advent of the digital age has gotten much of that material and content online, and saved a lot of shelf space and trees in the process. However, too many organizations still rely on e-mail to distribute such electronic materials; having such content posted instead in a central, server-based location is wiser, and leads to leaner and more manageable inboxes. And document libraries save your company tons of disk space, too.

✔ **Compliance:** Compliance has become a big, big deal in some industries, especially since the willy-nilly days before the high tech bubble burst. If your company is subject to government audits, regulation, and oversight (such as the Sarbanes-Oxley Act in the United States), putting your corporate information in a document library where all your team has access can ease your compliance efforts. Even if you don't fall under such oversight at your own company, this kind of regulation is becoming prevalent enough that a company with which you do business may require it of you.

✔ **Enablement:** A very common use for online libraries is to enable employees to be more self reliant. Often these days, employees are asked to multitask and manage themselves. In their multiple roles, they can't do their jobs well if they're not provided access to the right tools. Say you have a sales team that's in the business of writing proposals. Putting a boilerplate template for a sales proposal in a document library enables your sales team to do its job independently instead of either coming to you for the updated template or having to reinvent the wheel every time they're trying to close a new deal.

Figure 10-1 shows such a document library that acts as a reference library that contains a bunch of documents concerning accounting best practices.
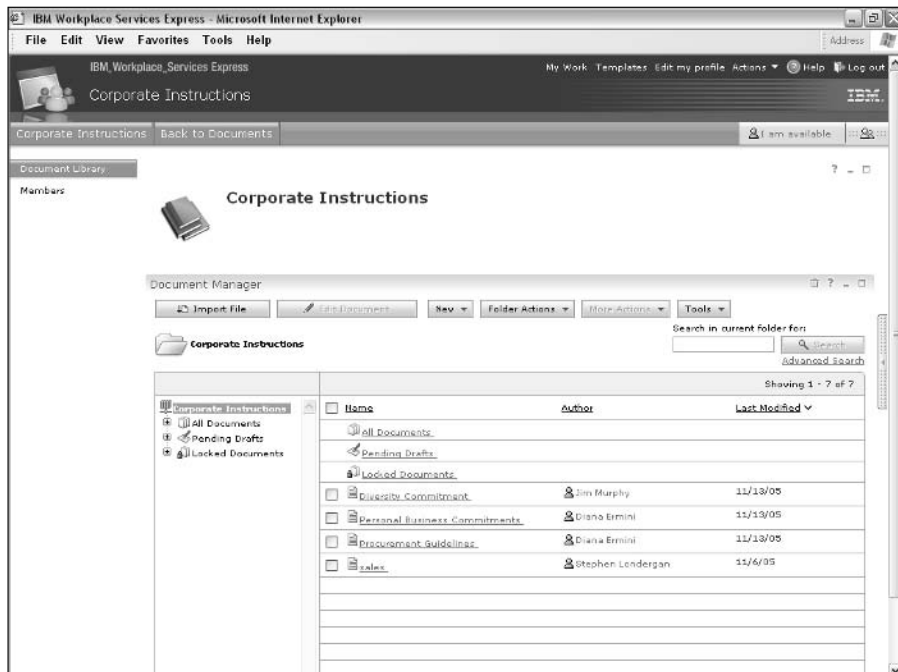
Figure 10-1: Use the document libraries to publish information to your team, such as policies and procedures.

Using document management for content creation

A common use, and one where WSE really shines for document management, is related to the creation of new documents and files (as opposed to just warehousing, as described in the previous section, "Using document management for reference"). In this case, document libraries aren't used solely as part of a reference system, but are also the collaborative foundation of the way content is produced, edited, and perhaps eventually disseminated outside the organization.

Imagine, for example, a product marketing team that is working together to design a marketing campaign for a new product, and which, for the sake of the argument, is producing a press release about why your company's new thingamajig is the best ever. A few people may be involved in turning out that release: Two or three might write the documents; then their manager needs to sign off on it; after that, the Public Relations department has to chime in; and eventually a lawyer needs to make sure that the press release is all ship-shape, legally speaking.

WSE document libraries have built-in collaborative tools to aid such a team as they work together to create and produce the press release, or any other kind of document. Features such as integrated instant messaging, document locking, and workflow can streamline and speed up the way a team works together. And imagine, for the sake of argument, that the lawyer in this little story is not an employee of the company at all, but a hired gun. The lawyer can still participate as a member of the team, because he or she can access the WSE document library.

Here are some ideas about how you can use collaborative document management in your organization:

✔ **Product Design:** The design process for new products is a highly collaborative affair, unless you're self employed and work all by yourself, down in your cellar. Document management can help your team design the new widget.

✔ **Responding to an RFP:** A request for proposal is the *lingua franca* for many large companies when they're soliciting bids. An extended sales team can benefit from working together in a WSE document library to create and manage the company's collective response to such a request.

✔ **Customer Service:** Rather than just throwing documents over the wall to a customer, why not invite the customer to participate in the production process for that document? Collaborating with customers leads to tighter relationships and better customer service.

✔ **Process Definition:** Similar to product design, teams that work together to produce a process (maybe to define a new human resources policy, for example) get that done more quickly and efficiently when they use WSE document libraries to churn out their stuff.

Figure 10-2 shows a collaborative document library in which a team is working to produce a new set of RFPs.

You can use WSE-based document management in so many ways, so this list is just a smattering of the most common ways WSE gets used to streamline the collaborative content creation process.

In general, any time people need to work together to create something — whether that something is a new policy for travel expenses or the design of a new jet airplane — they'll probably be working with content, and that means WSE document libraries can help.
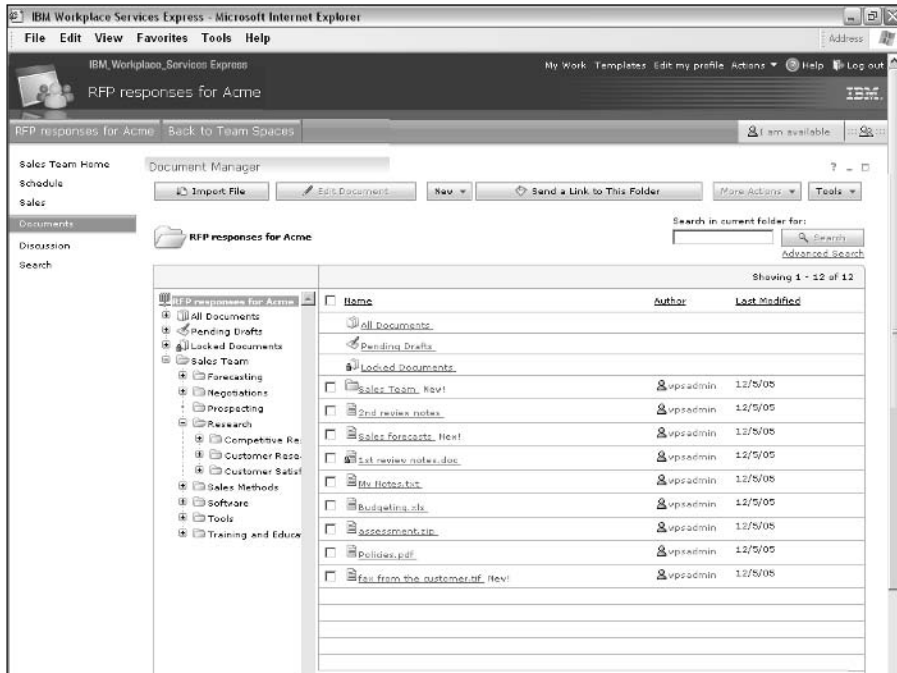
Figure 10-2: Use the document libraries to create information.

Integrating Microsoft Office

The documents, content, and files that you share in WSE document libraries can come from just about anywhere. Often, much of the content you want to share already exists before you start out with WSE. Not surprisingly, then, there's an easy way to import documents, en masse, into a WSE document library. Of course, WSE also has built-in methods to create content.

Pound for pound, more content comes from Microsoft Office than any other software program, so WSE has a special relationship with Microsoft Office. For example, WSE supports *round-trip editing* with Microsoft Office, which means that in the WSE interface, you can click the New Document button and be magically transported to Microsoft Office. Write your document or create your spreadsheet just as you've done a million times before. When you save the Office file, WSE takes over and automatically uploads it to the WSE document library. This seamless integration between Microsoft Office and IBM Workplace Services Express means that every document instantly enters the collaborative process; your boss can sign off on it immediately, your team can comment on it before the big meeting, and so on.

Or not. If you don't use Microsoft Office, WSE can still help. In fact, sometimes WSE is just the alternative for people who do not use Office (such as Linux users), or for people who use other programs (such as Adobe Photoshop or a different word processor) in addition to Office. The bottom line is that document libraries are built to work with whatever kind of document or content you have.

Getting Started with Document Management in WSE

Amazingly enough, all the WSE document management features discussed in Chapters 10, 11, and 12 are managed by a single portlet, called the *Document Manager*. The Document Manager organizes the *document libraries* you come across.

As a result of the massiveness of the WSE document management machine, predicting exactly how you'll first encounter the document libraries isn't as easy as it seems; the document libraries can even be added as a feature of any team space.

Usually, however, document libraries are not created as free-standing affairs, separate and distinct from any single team space. In most cases, you access WSE document libraries by clicking the Team Spaces button, and then clicking the Documents button. Doing so shows the Document Libraries Catalog, shown in Figure 10-3.

Figure 10-3:
The
Document
Libraries
Catalog lists
all the
document
libraries you
can use.
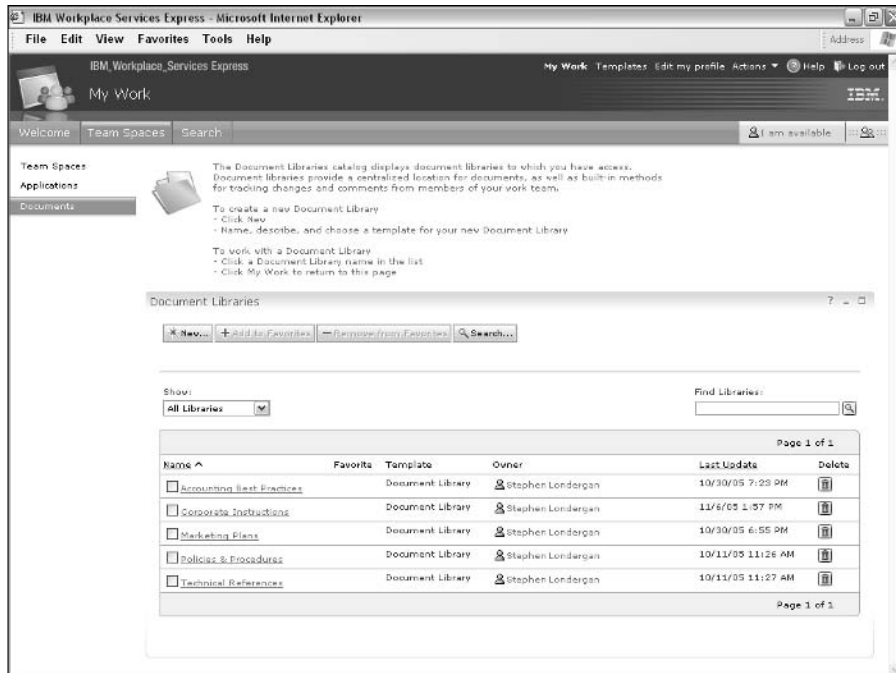
The Document Libraries Catalog is the list of libraries you have access to and can use. Much like the Team Spaces Catalog (see Chapter 6), the Document Libraries Catalog has built-in tools to help organize the list. You don't see any document libraries in this list for teams of which you're not a member.

The list of document libraries in the catalog has six columns:

- ✔ **Name:** The library's name is listed in this column as a clickable link. Click it to access a list of all the documents contained in a library.

  To open a particular document library, click the library's name in the first column. Click the individual folders and files in the library to access them.

- ✔ **Favorite:** This column indicates whether you've selected the library as one of your own personal favorites.

- ✔ **Template:** This column tells you that it is, in fact, a document library.

- ✔ **Owner:** Check this column to see the name of the person who created the document library.

- ✔ **Last Update:** This column tells you the last time a document was created, edited, or deleted.

- ✔ **Delete:** Clicking the button in this column permanently deletes the document library. Only a document library's moderator or owner can delete a document library. Proceed with caution.

TIP

Click the column heading for the Name column or the Last Update column to sort the list of libraries by that column.

Searching for a document library

If you know a library's name but you can't find it by searching through the entire list of document libraries in the catalog, you can enter the first few letters of the name in the Find Libraries field and click the Search button. The Find Libraries field is at the top of the catalog (refer to Figure 10-3).

REMEMBER

The Find Libraries field doesn't enable you to conduct a bonafide search. You really need to know the exact name of the document library (or at least the first word in the library's name) to see the results you want. After you enter the first portion of the document library's name and click the Search button, the list of document libraries in the catalog shortens to show just the ones that start with the same letters. Figure 10-4 shows the results of a search for *policies*.

Use the Clear Results button if you want to reset the list of team spaces and see all the libraries in the catalog.

Figure 10-4: Use the Find Libraries field to find a document library by name.

You can also sort the list of libraries with the Show drop-down list. Click the drop-down list to select

✔ **All Libraries:** Shows all the libraries to which you have access.

✔ **My Libraries:** Shows libraries for which you're a moderator or owner.

✔ **Public Libraries:** Shows libraries that are open to everyone.

✔ **Favorite Libraries:** Shows the libraries that you've designated as favorites. See "Using and setting favorites" for more information.

Using and setting favorites

If you find that there are certain document libraries that you use more often than others, tell WSE about it by clicking the selection box next to the library's name and clicking the Add to Favorites button. The libraries you select as favorites are always displayed with a check mark in the Favorite column, as you can see in Figure 10-5.
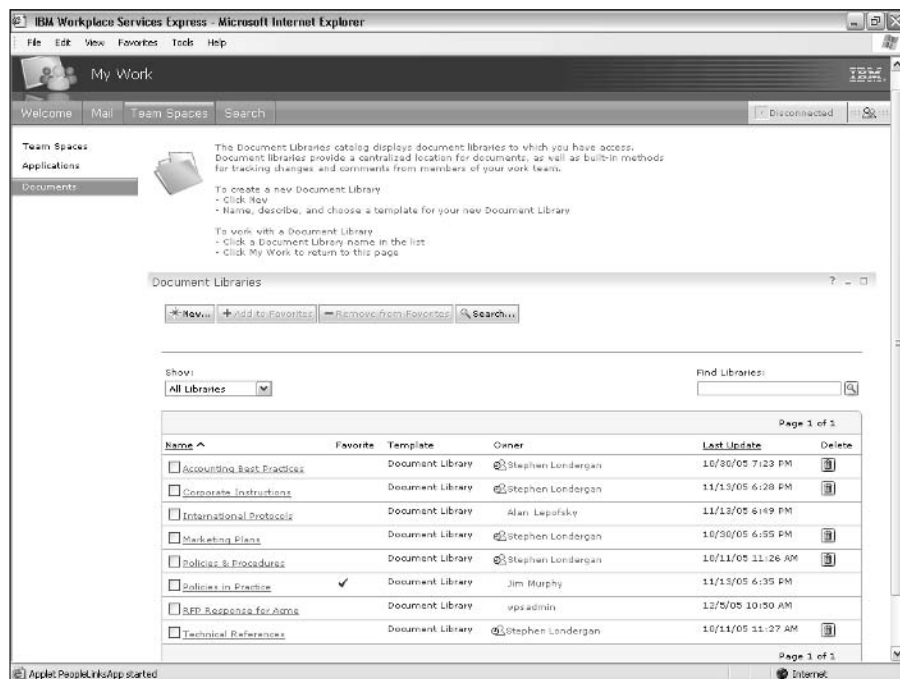
Figure 10-5: Identify your favorite libraries to make them easier to find later.

TIP

Now you can use the Show menu to display only these favorites.

If you have access to just a few document libraries, your list will be small enough that using the Favorites option is not worth the bother.

Creating a new document library

If you have the appropriate level of access to WSE, you can create a new document library. Access the Document Libraries Catalog and follow these steps:

1. **Click the New button.**

   The New Document Library form appears.

2. **Fill out the form by giving your new document library a name.**

   You can also add a description if you like.

3. **Click OK.**

   The Set Component Properties form appears.

4. **Use the New Member Notification drop-down list to determine whether or not the team members will be notified when new documents get posted.**

5. **Click OK.**

   A notification appears on-screen, telling you that the new document library has been successfully created, as shown in Figure 10-6.

TIP

Of course, the only benefit to creating a document library is the ability to post documents in it. For information about dealing with documents in document libraries, check out Chapters 11 and 12.

Adding members to a document library

Usually, the first thing you want to do after creating a new document library is set it up so that teammates have access to it and can begin contributing documents. Use these steps to add members to your document library:

1. **Open the document library.**

   The Document Manager page appears.

2. **Click the Members button on the left side of the screen.**

3. **Choose Actions⇨Add Members.**

   The Directory Search: Find People dialog box appears.
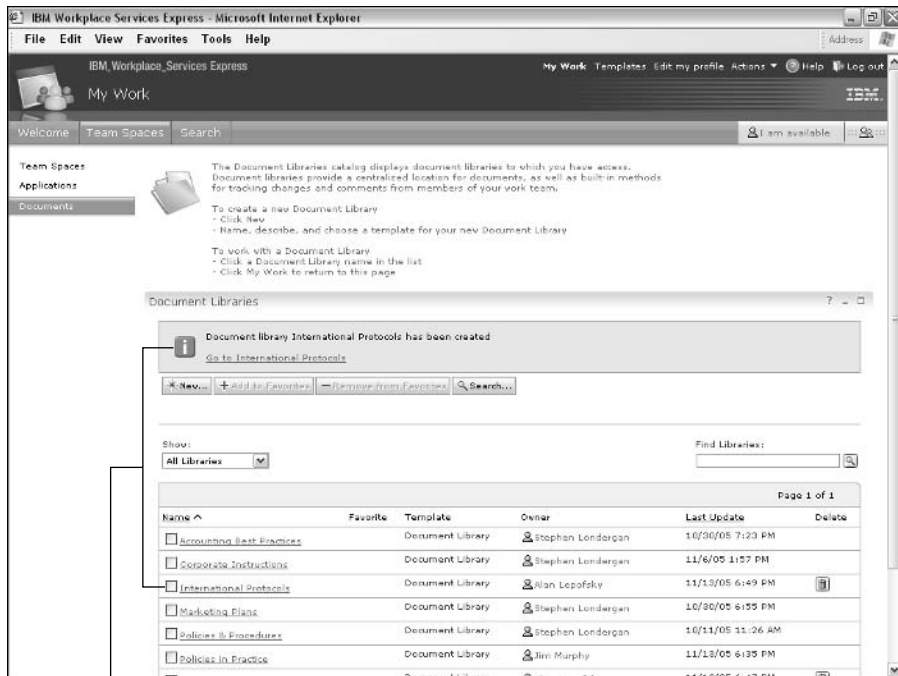
Figure 10-6:
A new
document
library has
been
created.

WSE lets you know that your document library has been created and puts it in the catalog.

4. **Enter the name of the person to whom you want to grant access in the Search For field and click the Search button.**

   The Search results list displays the names of the people who match.

   TIP

   You can use the asterisk (*) wildcard in the Search For field. For example, if you enter Lon*, WSE finds anyone whose name begins with *Lon* (*Lon*dergan, for example). Entering an asterisk all by itself in the Search For field displays all the entries in the directory, which is a cool trick if you want to scroll through the list and select names at your leisure.

   Figure 10-7 shows the Directory Search: Find People dialog box with results of a search for *lon*.

5. **After you select the name(s) you want, click the Add button.**

   TIP

   To select more than one name, hold down the Ctrl key when you click each name.

6. **Click OK.**

Figure 10-7:
Adding new
members to
a document
library
with the
Directory
Search: Find
People
dialog box.
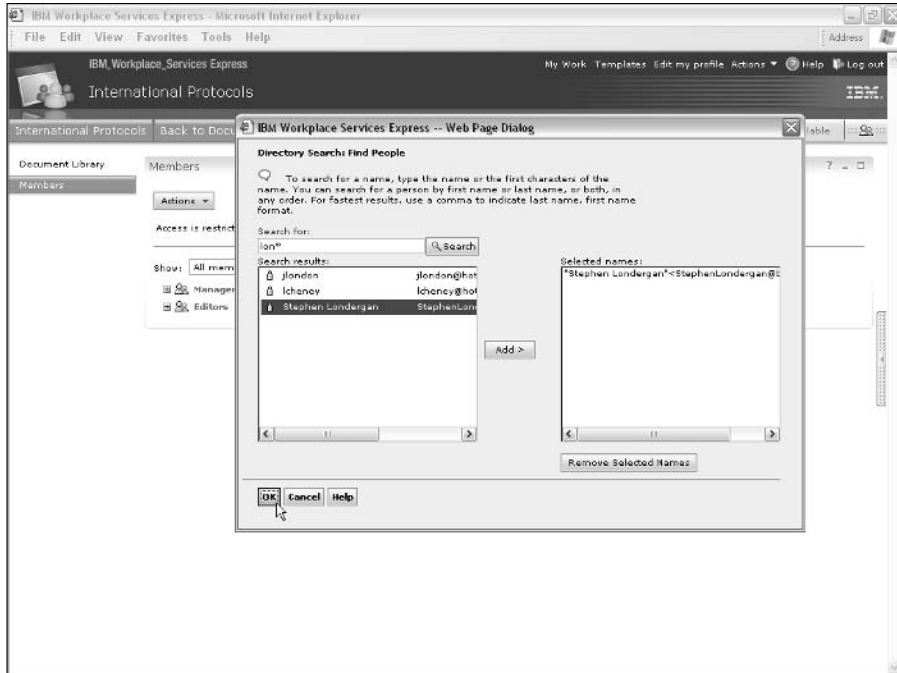
Finding your way around a document library

Figure 10-8 shows a sample document library. Although the document and folder names in your document libraries will be different than the ones shown here, certain parts of a document library are common to every document library you use.

Use these parts of a document library:

- ✔ **Document Manager toolbar:** This toolbar contains buttons for interacting with the documents and folders in the document library, including the Import button, which I discuss in Chapter 12.

- ✔ **Search:** Type the name of a document in the Search in Current Folder For field and click Search to find a document in the library.

- ✔ **Document list:** In the Name column, you see a list of documents in the library; if the list takes up more than one screen, WSE automatically

adds Jump to buttons at the top and bottom of the document list so you can navigate through the documents.

✔ **Folder list:** The list on the left side of the screen shows you a list of folders. Each of these folders contains more documents.

Document Manager toolbar
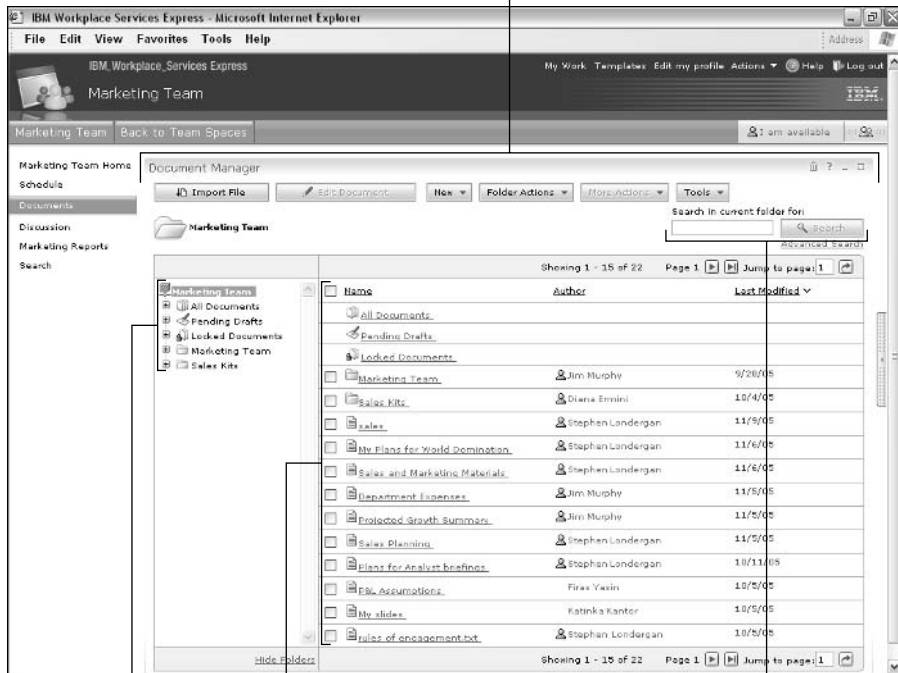
Figure 10-8: Document libraries help keep you and your team on the same page.

Folder list   Document list   Search field

Chapter 11

Don't Just Sit There, Get Involved with Document Libraries

● ●

● ●

*I*n Chapter 10, I introduce you to the basics of interacting with the Document Libraries Catalog. I show you how to set up a document library of your own, and show you the major facets and functions of the system. But there's a whole lot more to using a document library! In fact, how you use a particular document library depends on its purpose and the function of your team.

Sometimes, you use documents in the libraries as references. You and your team access the files to read and interact with the content, but not to edit or change them in any significant way.

In other cases, document libraries and the documents in them are very collaborative. The idea is that you and your team are constantly editing and changing content; working together to produce the best and most comprehensive press release, marketing report, budget spreadsheet, RFP response, or what have you.

REMEMBER

Chapter 11 focuses more on how you use, organize, and manage document libraries, but not so much about how you create and edit the contents of the documents. Creating and editing content in a document library gets the attention it deserves in Chapter 12.

Getting Familiar with Your Document Access and Editing Rights

As is always the case with IBM Workplace Services Express, what you can see and do in any given document library is determined by your role in that particular document library. Of course, your role in *this* document library isn't necessarily your role in *that* document library. Sometimes you can look without touching; other times, you can delete documents with impunity.

For example, imagine a document library that acts as a reference for your organization's human resources policies — it tells you how much vacation you get to take (never enough), how to qualify for health benefits, and how to get reimbursed for business expenses. In this kind of document library, you can't modify a darn thing. Look, but don't dare touch!

Here's a list of roles you may find assigned to you when you access various document libraries:

- ✔ **User:** This role essentially means that you can read, but not edit, the documents in the document library. That just makes sense — we can't have people outside the HR department editing those documents.

- ✔ **Editor:** Editors can make edits to a document, and even have the power to delete their own documents. In the HR document library example, employees in the HR department have editor access to the files, but employees of the company have user access.

    In most document libraries, and most teams, the large majority of people have user status. Only a select few have editor status.

- ✔ **Privileged user:** In a collaborative team space, where you and your team are working together to bring some new product to market, you need more people to be able to post, edit, and delete their own documents, as well as edit other people's documents. The big difference between editors and privileged users? The latter can edit and delete anyone's documents, while the former can edit and delete only their own.

    The coveted rights most members of a team space vie for are the ability to add and edit documents in a document library. If you're a document library owner (see the following bullet), you have to think about the access level a given person has to a document library. On one hand, you don't want to give too many people the power to muck up your documents. On the other hand, if you give too few people the right access, the library will be empty, and team members will harangue you for access rights all the time.

✔ **Owner:** The owner of a team space (and the document library it contains) has a much higher level of access. Owners, well, own the library, so they have the power to grant and deny access levels to the other people on the team. They can also modify or delete any document in the library.

TIP

In a collaborative situation, the percentage of people who have privileged user access — and can create and edit the documents in the document library — is much higher than in a reference document library like the one in my HR document library example.

✔ **wpsDocReviewer:** As you can see in Chapter 12, roles sometimes get a little more complicated in a document library. Some users may have a special role that enables them to approve draft documents from other team members.

✔ **Specially modified access roles:** In large document libraries that contain lots of documents and document folders, it's often useful to define your own roles, to help you determine who can see what. For example, if you have a bunch of documents or folders that only certain people — perhaps only sales managers — should see, WSE lets you define your own roles and access levels to accomplish exactly that.

Using a Document Library

In the big picture, when you use a document library, you do one of three things:

✔ Work with the document lists, wherein you can search for documents, sort their titles, delete them (if you have the right to do so), and so on.

✔ Work with a particular document, usually to read its contents, or perhaps to comment on it without making editorial changes to the content.

✔ Work on a document, editing its contents. (See Chapter 12.)

Figure 11-1 shows the Document Manager page, with a document library that's part of a marketing team's team space. Because this particular document library has more documents than can be displayed all at once, it has Jump to buttons for navigating to the previous or next page of document summaries.

The Document Manager page divides the document library into two areas; on the right is the *list view*, which contains the items in the document library, and on the left is the *folder tree*. Click the items in the folder tree to navigate the subfolders and change the views in the document library.
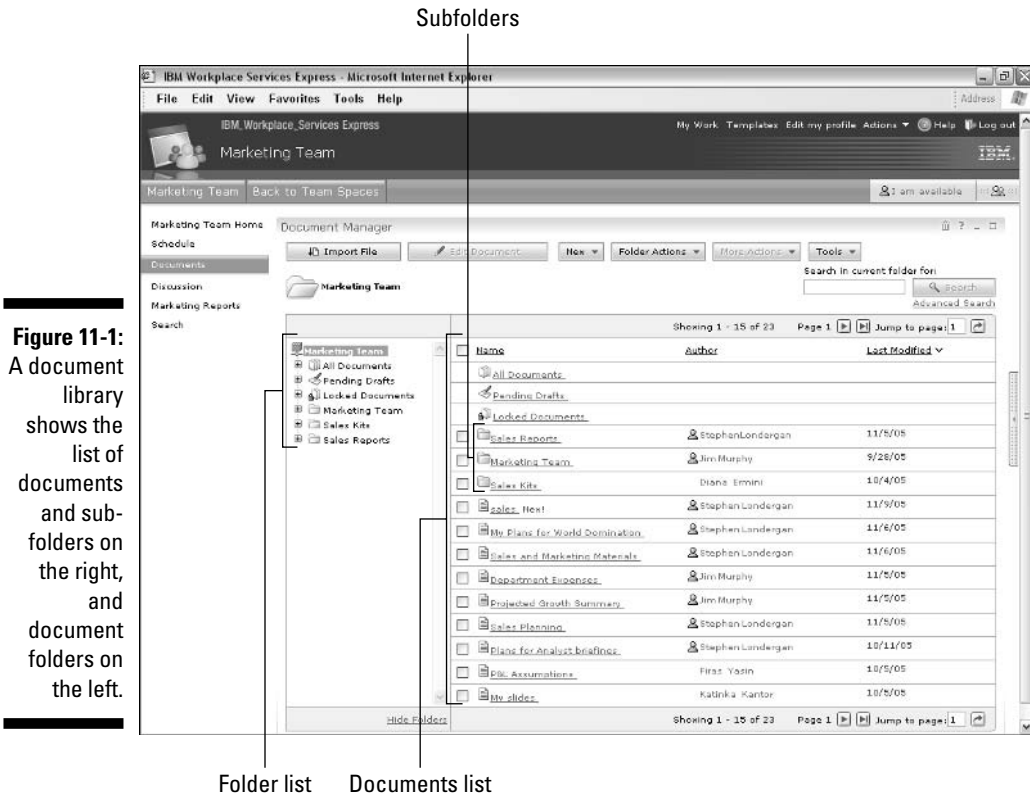
Subfolders

Figure 11-1:
A document
library
shows the
list of
documents
and sub-
folders on
the right,
and
document
folders on
the left.

Folder list   Documents list

What you select in the folder tree on the left determines what you see in the
list view on the right.

Working with documents

As you can see in Figure 11-1, the Document Manager lists each document by
title, and includes information about the author and the date on which the
document (or folder, or view) was last modified. As you'd expect, clicking
the author's name also indicates whether the individual is online.

To the left of each item in the list is a selection box, which you use to pick an
item, or items, in preparation for taking some action upon them. For example,
if you wanted to *lock* three documents to prevent your team from making
any further edits to them, you simply click these boxes so that check marks
appear next to the three documents. Then choose More Actions⇨Lock (see
Figure 11-2).
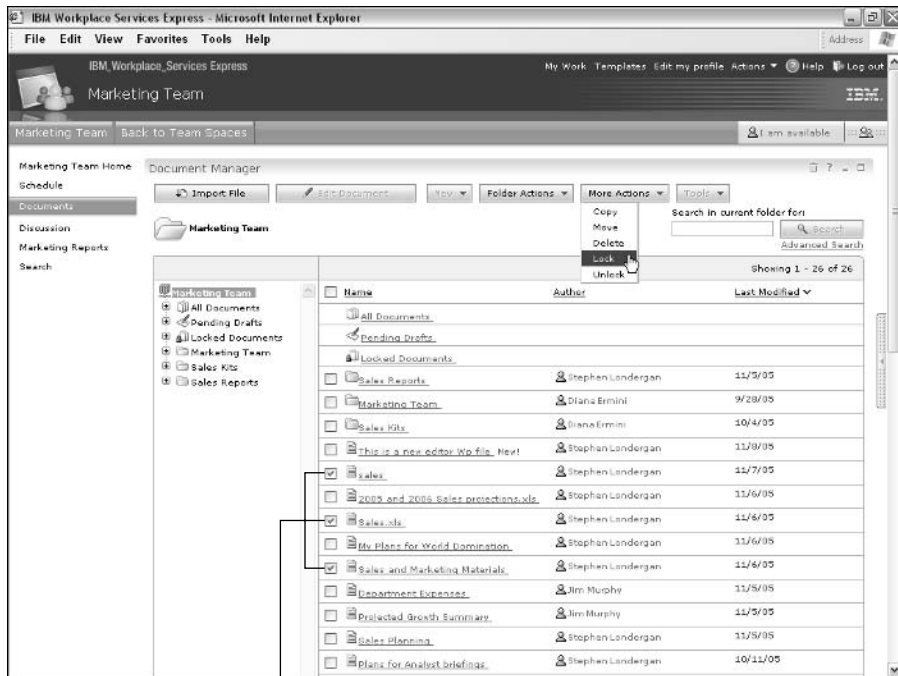
Figure 11-2:
Selecting
multiple
items in a
document
library.

All three of these items have been selected.

The Document Manager page also contains icons to indicate what, exactly,
the item is, and what state it is in. Here's a handy-dandy list of the icons
you'll encounter in a document library:

✔ **Folder:** This icon indicates that the item isn't a document at all, but a
collection of documents.

✔ **View:** This icon indicates that this collection of documents is organized
differently; perhaps it's organized and sorted by a different column.

✔ **Document:** This icon indicates that the file has been created or imported;
for example, you might see this icon next to a Microsoft Excel worksheet.

✔ **Locked:** This icon indicates that a document has been locked (probably
by its owner). Locked documents can't be edited.

✔ **Pending drafts:** This icon indicates that the document isn't yet ready
for the whole team. Pending drafts only appear in the summary if you
are the document's owner or the person to whom it has been sent for
approval.

Working with folders

The *folder tree* is used to determine what files are listed in the Document Manager; it also enables you to navigate among the various folders and views in the library. You can *nest* folders (create a subfolder inside parent folders), and the items listed in the folder tree can be expanded and collapsed by clicking the + or – sign next to the folder in question.

Understanding the difference between a folder and a view

When you click an item in the folder tree, the list on the right automatically displays the contents of that particular item. In the folder list, you will find both *folders* and *views*.

You use folders to organize the documents in a document library. A folder is a collection of documents. Sometimes a folder also contains other folders. A document ends up in a folder because a person put it there, as you see in Chapter 12.

A view, on the other hand, is a little different. Like folders, views are used to organize a document library. However, views differ from folders in that a view's contents are controlled *programmatically.* In other words, every view has specific selection criteria, so that when you click the name of a view, only the documents that match the view's selection criteria appear. For example, you may create a view to show all of the documents created by a particular member of the team, or a view that shows all of the documents that have the word *August* in their title. You can create as many views as you need in order to slice and dice the documents whichever way you want.

A document appears in a folder because a person put it there; but a document appears in a view because it matches the selection criteria you built for a view.

Navigating through the folder tree

You can hide the folder tree altogether by clicking the aptly-named <u>Hide Folders</u> link (refer to Figure 11-1) at the bottom of the folder tree; click the equally well-named <u>Show Folders</u> link to bring the folder tree back.

The most important entry in the folder tree is that one at the very top, which is called the root. (Trees, root, you get it, right?) The root is important because it's like a home page of the document library. If you're using an especially large document library with lots of documents, and lots of folders and subfolders, you might get lost or disoriented. Click the root to go back to the top of the folder hierarchy. In Figure 11-2, the root is called Marketing Team.

I've always bought in to the whole tree metaphor to understand the way folders and nested folders work in a document library, but the word *root* is a little

misleading because the root is the topmost, highest level view of a document library. In nature, of course, roots are underneath and at the bottom. To mix this awkward arbor metaphor with another, think of clicking the topmost item in a folder tree as a means of quickly getting back home. Just pretend you're a friend of Dorothy, and click your heels twice.

When you click a folder's name in the folder tree, one, or maybe two, things happen:

➤ The list on the right changes to show you only the documents and folders that are contained in the folder you clicked. Because a folder can contain both documents and other folders, you are likely to see both folders and documents in the list.

➤ The second thing that happens, sometimes, is that the folder tree itself expands to show the folder's subfolders. This change only occurs in the folder tree if the folder you click contains one or more subfolders.

Figure 11-3 shows a document library with nested folders. As you can see in the figure, the contents of the Client-Ready Materials subfolder are displayed in the list, including a document and a subfolder (called My New Folder). This same subfolder also appears in the folder tree, listed under the parent folder Client-Ready Materials (which itself is a subfolder of the Sales Kit folder).
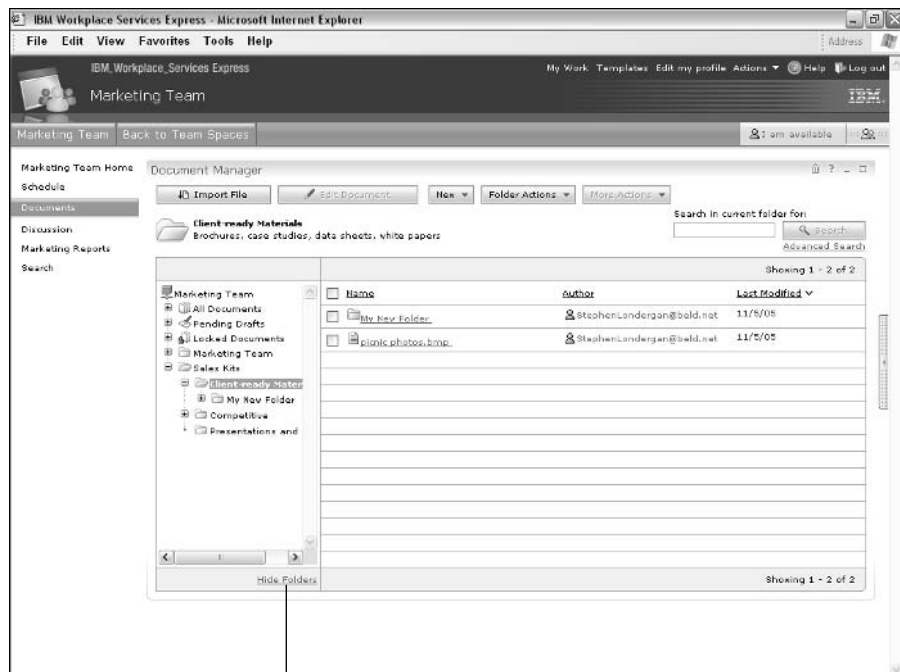
Figure 11-3:
Click a folder's name to display its contents.

Click to hide folder list.

Creating a new folder

Create a new folder in a document library to give your team a way to organize documents. Figure 11-4 shows the new folder form that you use to add a folder to a document library.

Use the following steps to create a new folder:

1. **Select the folder that will contain the new folder.**

   Select the root to have the new folder appear at the highest level of your library's folder tree, or select an existing folder if you want your new folder to be a subfolder.

2. **Choose New➪Folder.**

   The New Folder form appears.

3. **Enter the name of the folder in the Folder Name field.**

   If you want, you can also add a few words describing the folder's purpose in the Description field.

4. **Click OK.**

   The new folder is created, and it is selected in the folder tree. The list view is empty, of course, because new folders are empty until someone on the team puts documents in them.
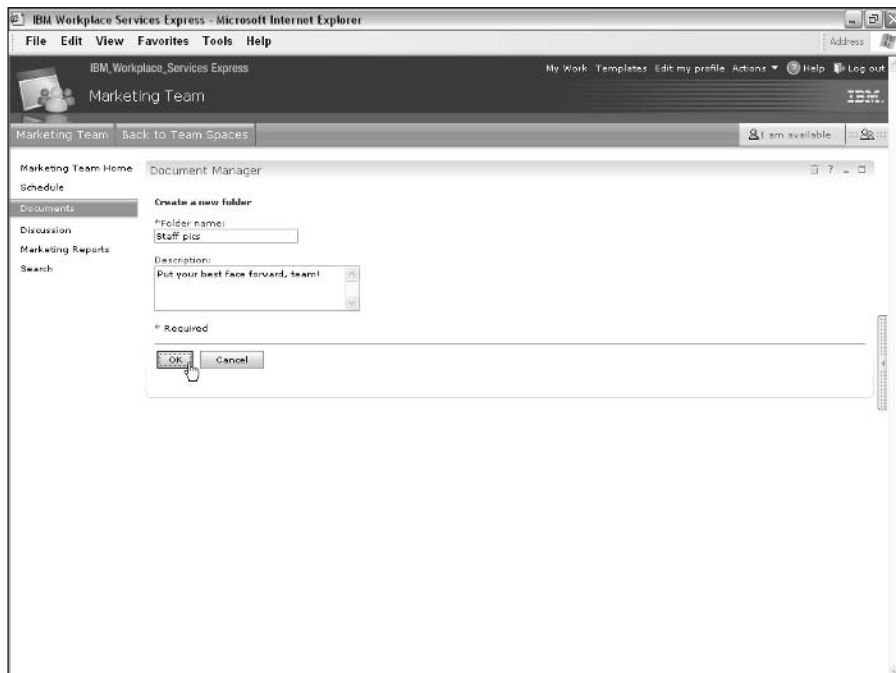
Figure 11-4:
Creating a
new folder.

If you've used Windows Explorer, you are probably used to moving files and folders with a quick movement of the mouse. But in the document libraries, you can't move a folder after it has been created. If you find that you have a folder in the wrong place (say as a subfolder of the wrong folder), the only way to move it is to essentially delete it altogether and then recreate it in its proper location. But deleting a folder also permanently removes the folder's contents, so deleting and recreating folders can become a relatively time-consuming process that involves moving each document in the folder to its new location.

Deleting a folder

Deleting a folder also deletes its contents, including documents, subfolders, and all the documents in the subfolders. Don't delete a folder unless you're really sure you're done with the contents. IBM Workplace Services Express doesn't give you a way to bring these files and folders back.

Use these steps to delete a folder:

1. **In the folder tree on the left, click the name of the parent folder that contains the subfolder you want to delete.**

   The list view shows the contents of the folder you selected, including all documents and subfolders.

2. **In the list view on the right, select the folder you want to delete by clicking the selection box next to its name.**

3. **Choose More Actions⇨Delete.**

   The Confirmation dialog box appears.

4. **If you're sure you want to delete the folder and all its contents, click OK.**

   The folder and all its contents are gone, forever.

Deciding who can use a folder

By default, the access settings for a folder are inherited from its parent. If you create a folder called *January* inside a folder called *Sales Reports,* for example, anyone who has access to the Sales Reports folder automatically has access to the January folder, too. Folders at the top level of the folder tree inherit their access from the document library's access list, and a document library inherits its access level from the team space in which it is contained.

That sounds like a complicated list of rules, but it actually makes your life easier. More often than not, the access you want to provide for that subfolder is the same access you want to provide for its parent, and even the whole document library and team space; as long as you have set up the right access rights and have defined the right roles for the team space, your January folder has the right level of access too. (Setting access levels for a team space is covered in Chapter 7.)

REMEMBER

The only time you need to sweat the access list for a particular folder is if you want a particular folder's access list to be different than all the rest.

Imagine, for example, a sales team place, that contains a document library. In the document library there's a folder called Sales Reports, and that folder contains 13 subfolders. Folders 1 through 12 are for the months of the year — January, February, March, and so on. The 13th folder is different, however. It's called Commission Statements, and is used by your sales managers. You want that folder's contents to be off limits to everyone except the sales managers.

The access level for the whole team space is already set to give the sales team access, and that access level is inherited all the way down to the monthly sales folders, so you don't have to do anything special to give the team access to those 12 folders.

You do, however, have to set up a more restricted access list for the Commission Statements folder so that just the sales managers have access to it, its subfolders, and any of their contents.

Use these steps to set the access rights for a folder:

1. **Navigate to the folder whose access level you want to change.**

   The list view shows the contents of the folder.

2. **Choose Folder Actions⇨Set Access to This Folder.**

   The Resource Permissions page appears. See Figure 11-5.

3. **Select the roles that you want to have access to the folder by clicking in the check box(es) of the roles on the Resource Permissions page.**

   These roles will also have access to all the contents of the folder (including subfolders).

4. **Click OK.**

REMEMBER

Inheritance is the coin of the WSE access realm, so changing a folder's access level so that it can be used only by certain members of the team means that the documents in the folder (and any subfolders in the folder) will only be accessible to people with that role, too.

See Chapter 15 to read about defining the roles that you have available on the Resource Permissions page.
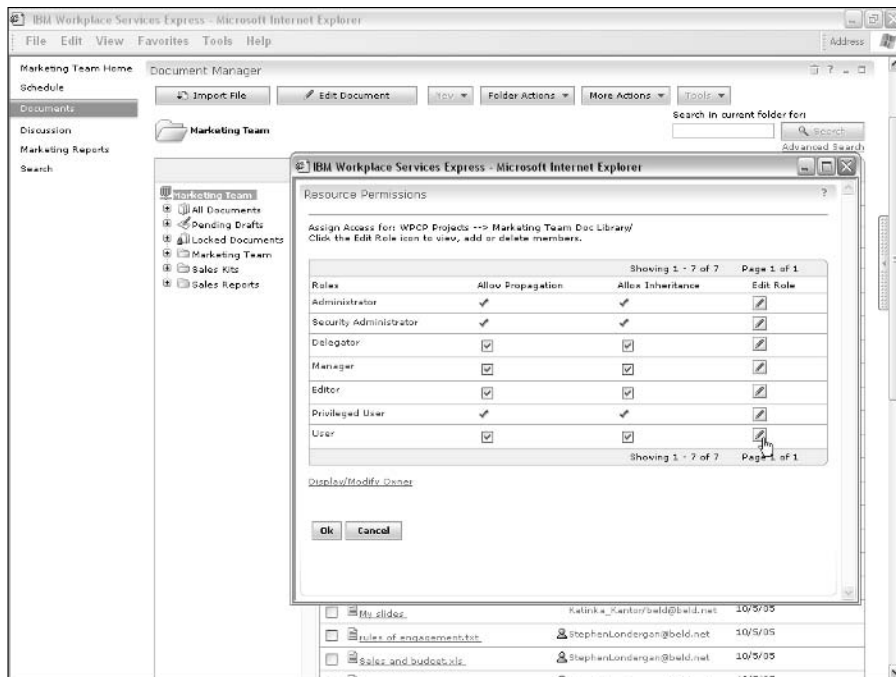
Figure 11-5:
Deciding
which role
is required
to access a
folder and
its contents.

Renaming a folder or changing its description

If the content or purpose of a folder changes, you may feel like you need to change the folder's name, too. Or maybe your esoteric naming system is only memorable and descriptive to you. Whatever reason you may have to change a folder's name or description, you can use these steps to make the necessary changes:

1. **Navigate to the folder whose properties you want to change.**

   The list view shows the contents of the folder.

2. **Choose Folder Actions⇨Edit Folder Properties.**

   The Edit Folder Properties form appears.

3. **Enter the new name and/or description.**

4. **If you want to announce the folder's new name to members of the team, click Send a Link to These People and then click the Add button to select the names of the people you want to notify.**

5. **Click OK.**

Creating a view

Views provide a way to organize the documents in a library. Every view has its own selection criteria, which WSE uses to determine which documents to display when you select the view. Unlike folders, views can't be nested. In fact, views are always displayed at the top, root level of a document library.

REMEMBER

You can't have a view inside a folder.

To create a new view, choose New⇨View. Figure 11-6 shows the View Criteria form that appears.

Figure 11-6: Use the View Criteria form to name a view and determine which documents it displays.

TIP

Although the most common views are based on document filenames, a view's selection criteria can also be based on the documents' titles, descriptions, authors, languages, or creation and modification dates.

Views are especially useful in large document libraries with many levels of nested folders. Such libraries, although admittedly well organized, present navigation challenges; team members may not know where in the hierarchy particular folders and documents are scattered, for example. The selection

criteria associated with a view transcends the folder hierarchy, and the view displays all the matching documents, no matter how deeply buried they may be in the library's folder hierarchy.

REMEMBER

If a given member of the team doesn't have the role required to see a given document, that document isn't displayed when that person uses that view, even if the document meets all the other criteria.

Establishing the criteria for the new view is just a matter of filling out the form and entering the appropriate search terms in the appropriate field(s).

TIP

Here are some tips:

- ✔ View names can contain spaces; however, asterisks (*), question marks (?), greater than (>) and less than (<) signs, percent signs (%), at signs (@), forward (/) and backward (\) slashes, apostrophes ('), double quotes (" "), pipes (|), colons (:), plus signs (+), pound signs (#), and ampersands (&) can't be included.

- ✔ For each criteria you enter — title for example — use the drop-down list to determine whether you want the view to display documents that match all of the words you have entered in the criteria field, or the exact phrase you entered in the criteria phrase, or at least one of the words, or none of the words.

- ✔ You can use the asterisk (*) wildcard in the Filename, Title, Description, and Author fields.

- ✔ Use the Case Sensitive check box if you want words to match exactly. For example, if you click in this check box, the view displays titles like SALES REPORTS, but not sales reports.

- ✔ Use the date range fields at the bottom if you want the dates that documents were created or last edited to be a part of the view's selection criteria.

- ✔ You can combine multiple criteria (documents created by Stephen Londergan in January, for example) by using the Combine Criteria With drop-down list. Select And if you want the view to display documents that match all of the criteria fields you fill out; select Or if you want the view to display documents that match any of the criteria.

- ✔ Click OK when you're finished defining the selection criteria.

Getting a jumpstart on view criteria

How many times have you been at a cocktail party, bris, or wedding reception, when someone said to you, "Geez, I wish I could think of reasons to create views in my WSE document libraries"? Well, now you know how to

answer that question. Armed with this list, you'll never be at a loss for words or without ideas on how views can help your team sort through the documents in a document library:

- ✔ **By Author:** Create a view to display all of the documents that were created by a certain person.

- ✔ **By Date:** Create a view with date-based criteria to show all the documents that were added in a given month, quarter, or year.

- ✔ **By File Type:** For example, if you're looking for photographs, use `*.jpg` in the filename field to display all the JPEG files in the library. Or you can create a view that shows all of the Microsoft Word documents that have been posted by using `*.doc` in the filename criteria field.

- ✔ **By Project or Customer:** Use the * wildcard, the title, and the Description field criteria to show all of the documents related to a particular project or initiative. (Of course, this option only works if your team is responsible about always including the name of the project or customer in the description for the documents members create.)

TIP

Views, by their very nature, are used to limit the number of documents that are being displayed, and are only worth creating in large document libraries. If you have a document library with only a few documents, creating a bunch of views to manipulate those few documents just isn't worth the trouble.

Deleting a view

Use these steps to delete a view:

1. **Click the name of the document library's root.**

   The list view shows all of the contents of the document library.

2. **Select the view you want to delete by clicking in the selection box next to its name in the list view.**

3. **Choose More Actions⇨Delete.**

   The confirmation dialog box appears.

4. **If you're sure you want to delete the view and all of its contents, click OK.**

   The view is deleted.

REMEMBER

Deleting a view is significantly less dangerous than deleting a folder, because deleting a view doesn't delete the documents that match the view's selection criteria.

Finding the Documents You Need

The more you and your team use document libraries, the more important knowing how to search becomes. Document libraries with lots of documents and complicated hierarchies of nested folders often require a whole lot of (perhaps too much) clicking and navigating to find just the document you need. WSE has a built-in search facility that automatically indexes the documents in a document library, to make them easy to find.

The WSE search engine indexes both the *metadata* (each document's file-name, title, author, and so on) as well as the document's content, so performing a search means WSE actually examines the body of the documents as it build its list of hits.

REMEMBER

When you search in a document library, you only get hits from the documents in that library that match your search criteria. If you want to search multiple document libraries, use the Search button in the WSE Navigation bar.

TIP

You can also find documents by using views, which I cover earlier in this chapter in the section "Creating a view."

Conducting simple searches

WSE displays the Search field and button at the top of every folder, so it's easy to use and always on hand. Searches are automatically reduced in scope so that they focus on the current folder, which means that entering a word or phrase in the Search For field and clicking the Search button only finds matching documents in the folder that's currently selected.

REMEMBER

To search the entire document library, make sure you click the document library's root before starting your search.

Figure 11-7 shows the results of a simple search for the documents in the library that contain the word *sales.* The results list works very much like any other list view, but does not include the folder tree. You can read, edit, and delete the documents as you would in any other document list.

Click the name of the document library (in Figure 11-7, the name of the document library is Marketing Team) to clear the search results and return to the folder tree and document list.
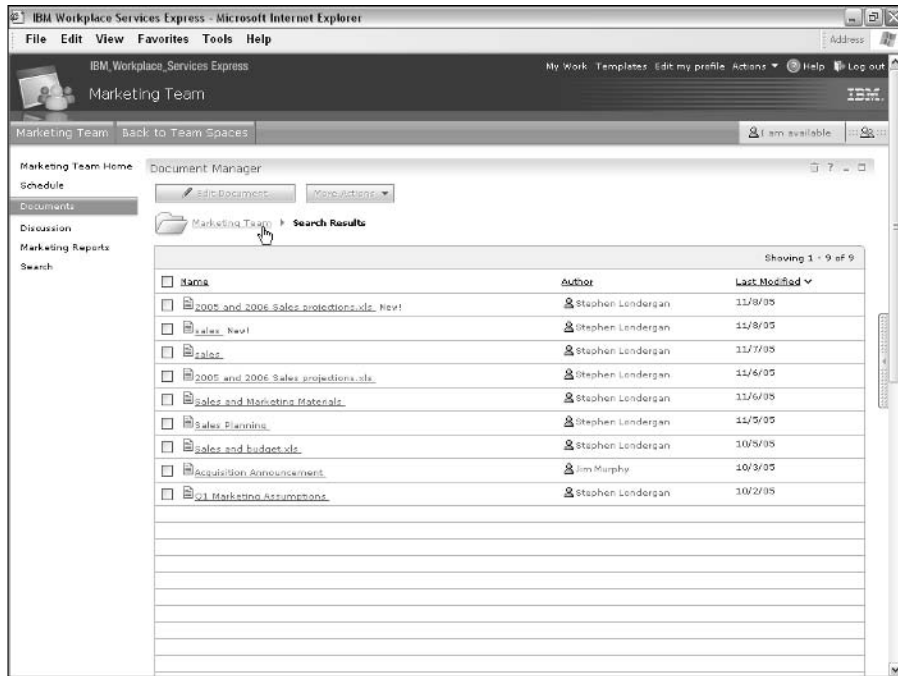
Figure 11-7:
The results
of a simple
search.

Using the Advanced Search page

WSE enables you to be more particular in your search with Advanced
Searches, which is shown in Figure 11-8 and displayed in WSE when you click
the Advanced Search link.

As you can see in the figure, an advanced search lets you use the Include in
Search radio buttons to narrow the search to just the title, perhaps, or just
the document's author. You can also widen the scope of the search to the
entire document library, and/or search for documents that are in a particular
language.

To perform an advanced search, enter your search terms and click the Search
button.

TIP

WSE isn't multilingual, so it doesn't know on its own whether a document
was written in English, Cantonese, or French. It bases its language search
results on what the author says about the language. As you see in Chapter 12,
when you or a member of your team creates a new document, one of the
fields WSE asks for is the language in which the document is written. The
Language of Search String drop-down list only works if your team has been
responsible about selecting the right language for each and every posted
document.
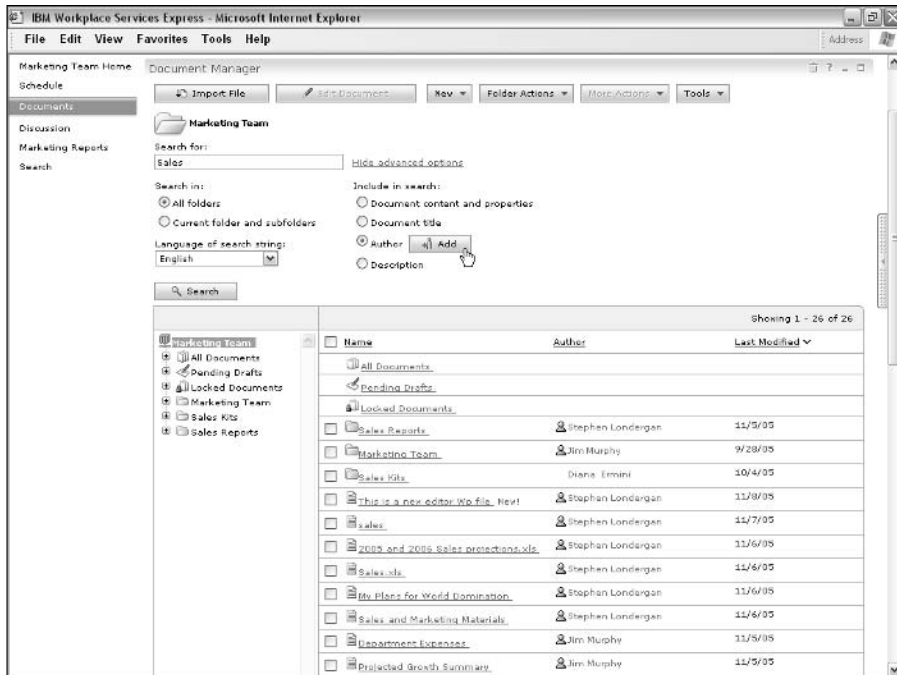
Figure 11-8:
The
Advanced
Search
page.

Sorting documents

Another easy way to find documents it to sort the items in a document library. Every folder's contents can be sorted by the Name, Author, or Last Modified column, in either ascending or descending order. Just click the name of the column to sort and reorder the contents of a folder.

Managing Documents

Chapter 12 contains more detail than you can imagine on how to create new documents and edit existing ones, but this section is your first stop if you want to know how to manage existing documents. Managing documents includes downloading, reading, and locking documents. Your ability to manage documents is, of course, based on the level of access you have to the team space, library, folder, or document in question.

Configuring your browser to download documents

Use these steps to configure Internet Explorer to download files from a WSE document library:

1. **Open Windows Explorer.**

2. **Choose Tools⇨Folder Options.**

   The Folder Options window opens.

3. **Click the File Types tab.**

4. **Select the extension you want to configure from the Registered File Types list.**

   For example, select DOC to associate that extension with Microsoft Word documents.

5. **Click Advanced.**

   The Edit File Type window opens.

6. **Choose Actions⇨Open.**

7. **Ensure that the Confirm Open After Download option is checked.**

8. **Click OK to save your settings and return to the Folder Options window.**

9. **Click Close to save your changes.**

Use these steps to configure Netscape Navigator to download files from a WSE document library:

1. **Open Firefox.**

2. **Choose Tools⇨Options.**

   The Options window opens.

3. **Expand the Navigator Category and select Helper Applications.**

4. **Click New Type.**

5. **Type** unknown **in both the MIME Type and Extension fields.**

6. **Select Save It to Disk.**

7. **Click OK to save your settings and return to the Preferences window.**

8. **Click OK to save your changes.**

Repeat this process for other file types that you plan to download.

Downloading documents

You can download any document in a document library. Downloading documents essentially puts a copy of the document onto your computer's hard drive for your personal use.

REMEMBER

If you intend to edit a document in a team space and make your revisions and edits available to the team, downloading the document is very clearly *not* the way to go. (I discuss editing content with or for the team in Chapter 12.)

Downloading a document is of fairly limited use because you are only getting a copy of the file. You should only download files that you intend to use for particular purposes. For example, in a library of human resources forms, you may need to download a claim form so that you can fill it out and mail it to your insurance company for reimbursement for those new eyeglasses (they look great, by the way).

You *can* download a document, make the changes to it, and then upload it back to the document library. Although that is technically possible, it's not a good idea because you have no way of eliminating the possibility that someone else comes along, makes changes to the document, and reposts it, therefore putting two versions of the file into circulation. In Chapter 12, I show you the built-in WSE features that facilitate creating and editing documents.

You've been warned.

To download a copy of a document, open the document in question and choose More Actions⇨Download.

What happens next depends on the way your browser is configured; if it's a Word document, Microsoft Word probably opens and loads the document automatically. Other kinds of documents may get automatically saved to your computer's hard drive so you have to start the program in order to open and work with the document.

Reading documents

Opening a document to view and read its contents is easy; just click the document's name in the list view. The list view is replaced by the document you clicked, as you can see in Figure 11-9.

WSE automatically renders the contents of the document, so that you (and your team) can view its contents with your Web browser. This is important, because it means that someone who is reading a WSE document doesn't *need* to have the software that was used to create it in the first place. For example, anyone on the team can view the contents of a Microsoft Word document, without having to start (or even purchase) Microsoft Word.

This rule applies to any program, not just Microsoft Office. Even though most of the content in your WSE document libraries probably originates in Microsoft Office, WSE works with just about anything. When you open a document in a WSE document library, you don't know if it's a PDF, Word document, Excel spreadsheet, photograph, or database file. And that's half the point of using WSE in the first place.

In Figure 11-9, you see links at the top of a WSE document. You can use the links to view the next document in the folder or the previous document in the folder. The <u>Back to Folder</u> link closes the document and returns you to the document list and folder tree (I suspect that you'll use this link most often).

Use these links to navigate between documents.
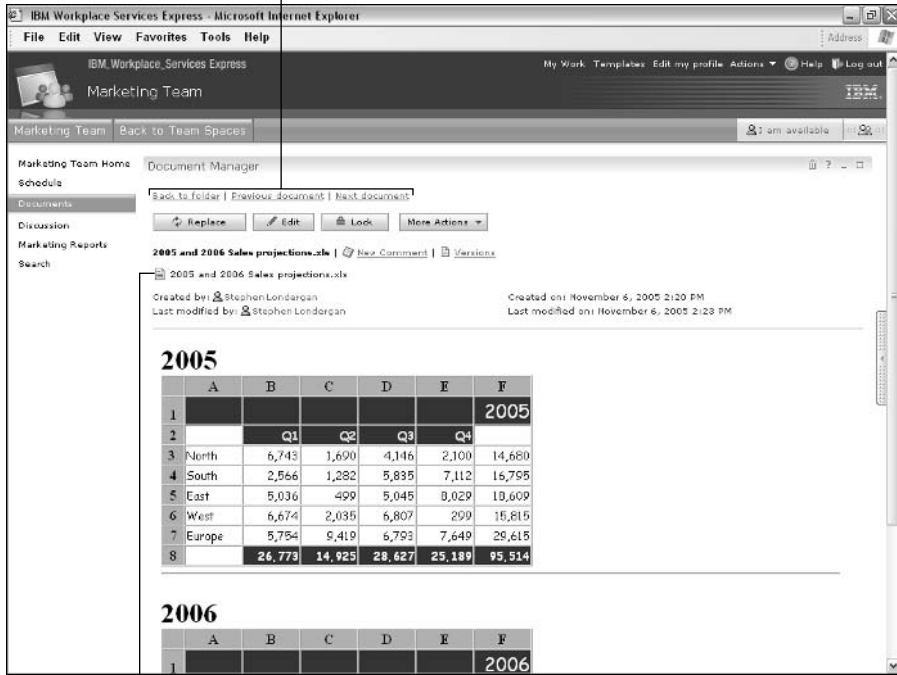
Figure 11-9:
Reading a
document
from a WSE
document
library.

Click here to access the document in its native format.

Locking and unlocking documents and folders

A locked document or folder is one whose contents can't be changed. Select the document(s) or folder(s) in question in the list view, and choose More Actions⇨Lock. Locking a document prevents everyone (including you) from editing or deleting the document.

TIP

As you can see earlier in this chapter in the section "Working with documents," locked documents are highlighted as such in the list view with a special padlocked document icon.

To unlock a document or folder and let the whole team edit it, select the document(s) or folder(s) in question in the list view, and choose More Actions⇨ Unlock.

Locking documents is a convenient way to prevent people from making a change to a document, and to let the team know that the document in question is finished. Although I just provided pretty easy instructions for unlocking a document, the access settings in most document libraries are such that most people can't unlock a document after it's been locked. Wouldn't that defeat the whole purpose of locking it in the first place?

Collaborating in a Document Library

The most important and interesting kind of collaboration that takes place in a document library is all about the creating and editing of documents — setting up a document library, for example, so that people can work together to produce content, edit one another's documents, and so on. This is such an essential part of WSE in general and document libraries in particular that all of Chapter 12 is focused on exactly that.

But in advance of Chapter 12, there are a couple of other cool things you can do in a WSE document library to make a document library and its contents more collaborative.

Finding ways to interact with an author

You have a few ways to interact with a document's author, or a folder's owner. Figure 11-10 shows you what happens when you click an author's name. You can interact in any of the following ways:

- **Show Person Record:** Choose this option to look up the person in your organization's directory; this is a useful option if you need to know more about the person than is shown when you click his or her name.

- **Send E-mail:** Choose this option if you need to communicate with the person and he or she isn't available for a chat session.

- **Start Chat:** When you're working with the list view, or have opened a document to read, you can send the document's author an instant message if you have a question or need clarification about the document. (Or how about just sending an IM to tell the author what a good job he or she did? It's not always about *your* needs, you know.) See Chapter 9 for more information on chatting.

- **Add to Instant Contacts:** Choose this option to make the person one of your buddies.

Commenting on documents

You can comment on a document in a document library, if you have some words of wisdom to add or clarification to make. Other people in the team can read and respond to comments, so you can have a discussion of sorts about a particular document, right in the context of the document itself.

To view the comments that your team has made about a document, click the Comments link at the top of the document. Usually, this button is immediately below the Edit button.

TIP

If you don't see a Comments link on a document, but you see a New Comment link instead; that just means that you'll be the first person to chime in.

Figure 11-11 shows a short discussion thread about the Sales Planning spreadsheet.

To add a comment to a document, open the document and click the New Comment link, or, if the document already has a raging discussion, open the document's comments and click either the New or Reply button, and fill out the New Comment form, as shown in Figure 11-12. Click OK when you're finished.
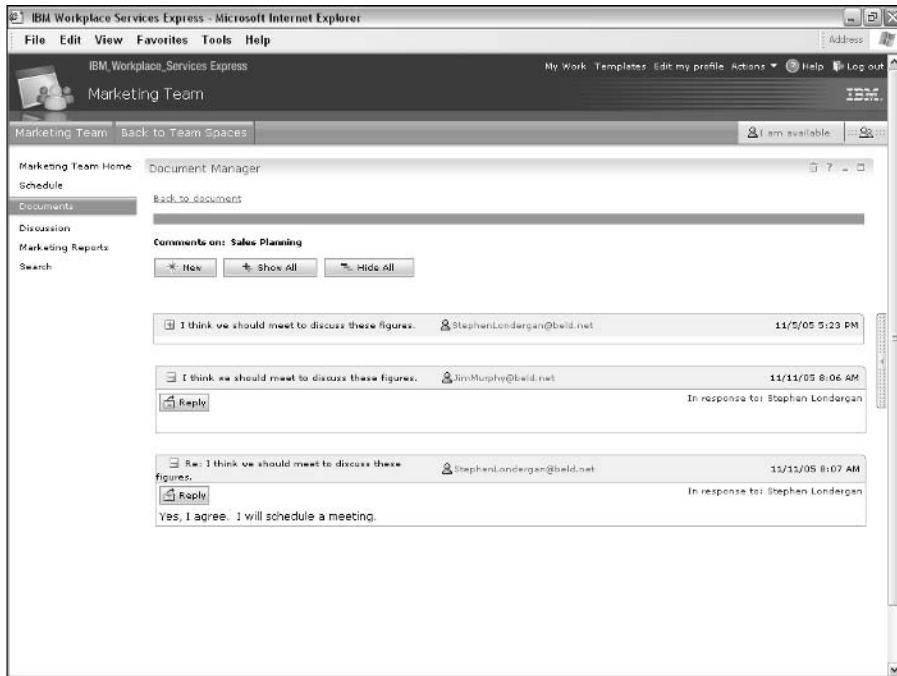
Figure 11-11:
You can
discuss
documents.
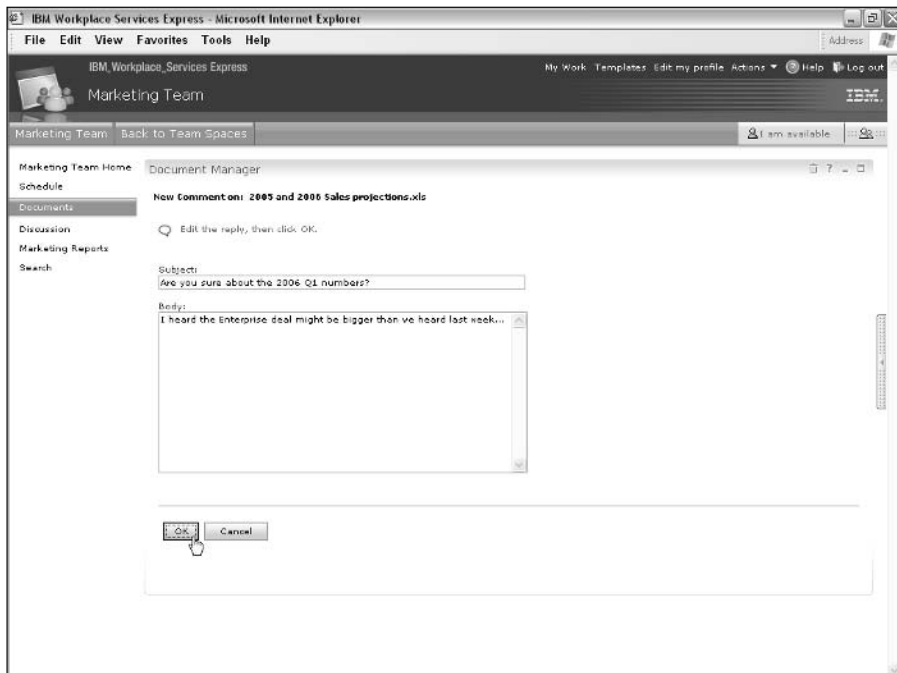
Figure 11-12:
Adding a
comment to
a document.

Sending a link

WSE has a built-in way to notify members of the team about changes to a document library. You can send a link to members of the team so that they can easily access the new version of the document, renamed folder, or what have you. You can send a link to any document, folder, or view.

TIP

Sending a link has two big benefits. First, and probably most obvious, it lets people know that there is a new or revised document, an especially useful tool if you have a big team working in stages on the same documents. Second, it reduces e-mail clutter, because you're sending a link via e-mail, as opposed to sending the 47MB (megabyte) document itself.

To send a link, open or select the document, folder, or view you want to tell the team about, and then choose More Actions⇨Send Link.

Use the Add button to pick the names of the people who you want to receive the link to the document, folder, or view via e-mail. Enter comments, if you have any, in the Comments field and click OK.

Figure 11-13 shows the Send a Link form.
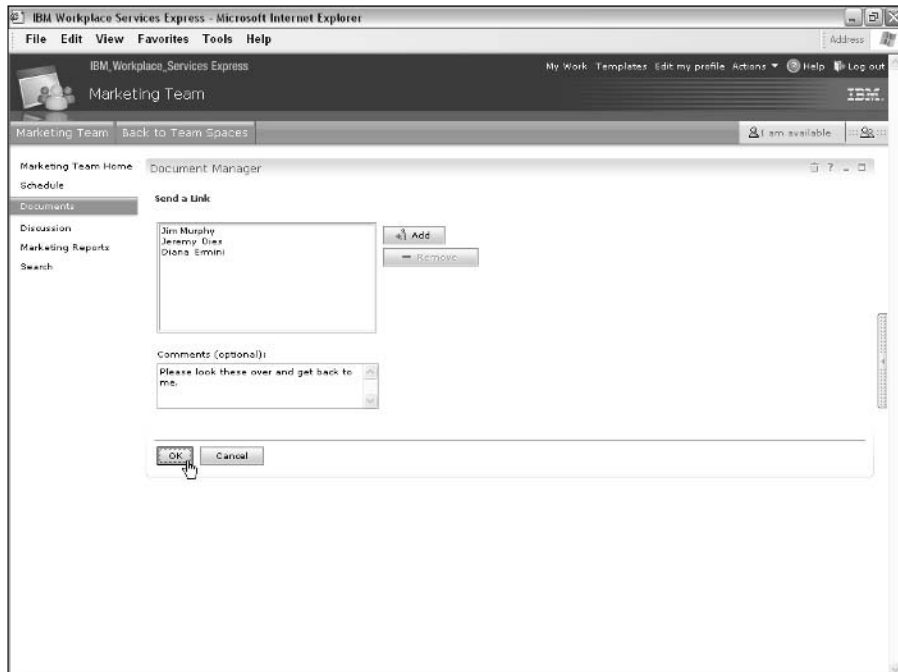
Figure 11-13: Sending links from a document library keeps the team up to date and reduces inbox clutter.

Managing Document Libraries as an Administrator

If you have administrator rights to WSE, you can manage a document library through the WSE administrator, often abbreviated as *admin*. The easiest way to tell whether you have this level of access is to look for the <u>Administration</u> link in the toolbar at the top of the WSE page. If you see it, you have administrative rights to WSE, and if you don't, you don't.

Use these steps to manage a document library:

1. **Log in as an administrator.**

2. **Click the <u>Administration</u> link in the toolbar.**

3. **Click Portal Content in the Navigator.**

4. **Click Manage Document Libraries.**

   The Document Library Manager appears, as shown in Figure 11-14.
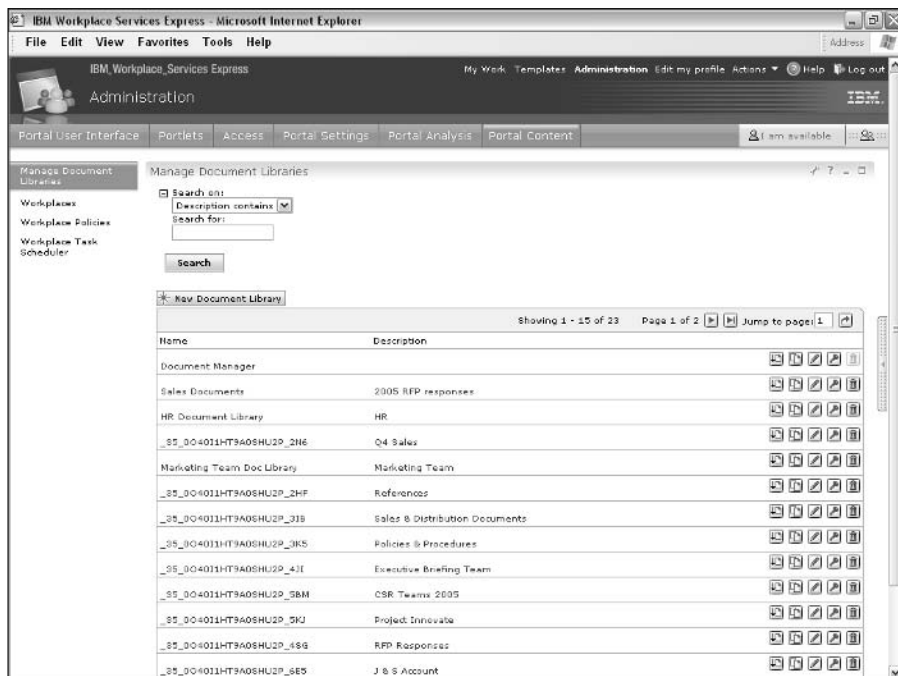
Figure 11-14: Managing WSE document libraries.

Because just about every team space has a document library, it's not surprising that there are a lot of libraries in the list.

As you can see in the figure, each document library has five buttons you can click to interact with it:

✔ **Import files to document library:** This button offers a quick and easy way to load a whole bunch of documents into a document library, all in one fell swoop.

✔ **Copy Document Library:** Before you had one document library, after you had two. Why would you want to copy a document library? Good question. But you *can*.

✔ **Edit Document Library:** Click this button to change a document library's properties.

✔ **Access Control:** Click this button to control the roles associated with the document library.

✔ **Delete Document Library:** Click this button to remove the document library, and all of its contents, forever.

Importing files

If you're going to import documents to WSE, it's usually because it's a brand-new document library, into which you want to upload a bunch of existing content. If, for example, you had previously been using shared folders on your local area network to distribute files to a team, importing them is the best way to load those documents into WSE document libraries, instead.

Although Chapter 12 discusses importing an individual document, importing through the Document Library Manager gives you (as an administrator) more control over the import process, and (most important) enables you to import more than one file at a time.

You can import files in one of three ways, the second of which is the method you'll likely use most often:

✔ **From the server file system:** Choose this option when the files to be imported are located on the WSE server.

If the files you're importing are located on the server's hard drive, click the Import from Server File System field and enter the path to the files in the Server Directory field.

✔ **From the client file system:** Choose this option when the files to be imported are on your own hard drive or network drive.

If the files you're importing are located on your computer, click the Import from Client File System field and use either the Select Files or Select File Directory button to find the files you want to import.

✔ **HTTP import:** Choose this option to create a document in the library based on the elements of a Web page you specify.

If you are importing the contents of a Web page, click the HTTP Import field and enter the Root URL of the page you want to import.

If you choose to import the files from the server's file system or if you choose an HTTP import, you can also schedule the import to take place at a later time, clicking the Import Content as a Background Process field, and using the Start Date and Start Time fields to pick the time.

Figure 11-15 shows the Import Files form.
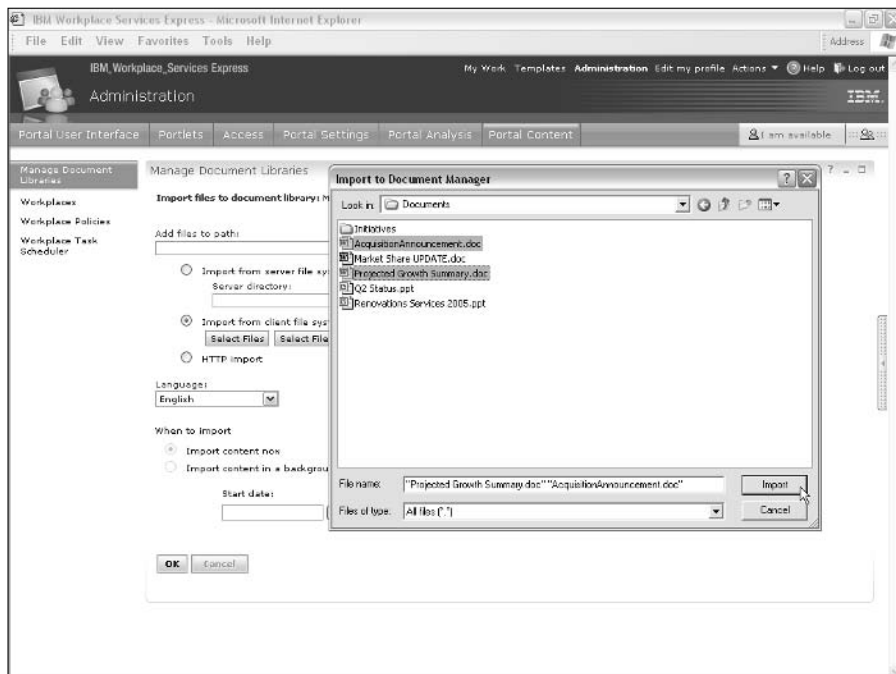
Figure 11-15:
Importing files into a document library.

The Add Files to Path field tells WSE where, in the document library's folder hierarchy, to put the documents you are about to import. If you leave this field blank, the files end up in the document library's root; if that's not where you want them, you should enter a more specific folder name, such as Sales Reports.

TIP

If you enter a folder name that does not exist, WSE creates the folder as it imports the files.

REMEMBER

When you import files from the client file system (also known as your computer), the files are imported immediately.

Editing a library's properties

Click the Edit Document Library button to change various document library settings, such as its title, version control settings, and so on. Figure 11-16 shows the document library properties form.
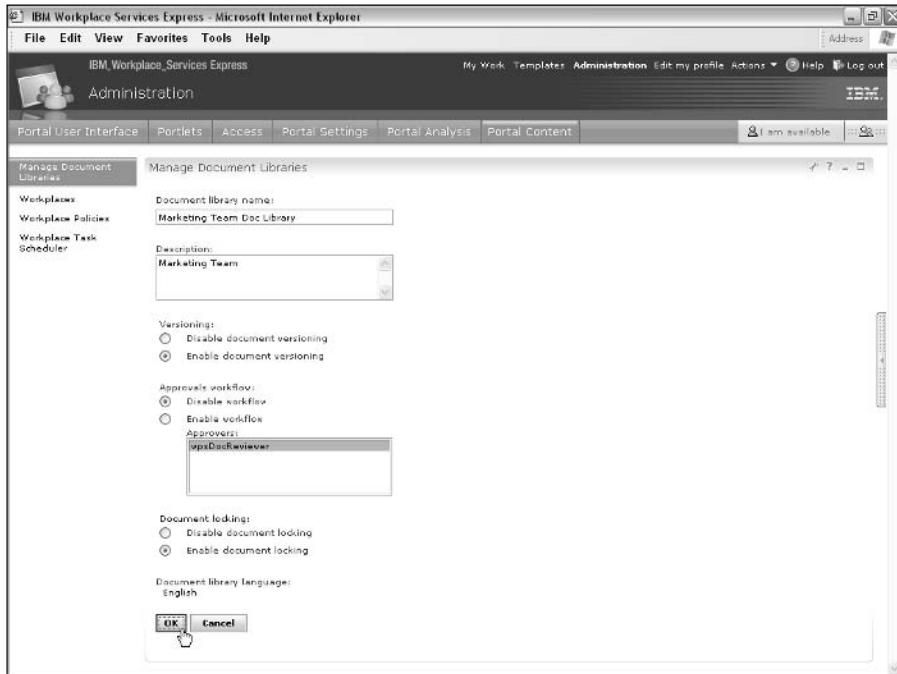
Figure 11-16:
Managing a document library's properties.

TIP

Here's a list of properties you can change:

- ✔ **Document library name:** The default name that WSE assigns to a document library that is created as part of a team space is fairly nonsensical, something like _35_0O40I1HT9A0SHU2P_4JI (it rolls off the tongue nicely, doesn't it?). Use the document library properties form to give a document library a more reasonable name, such as *Marketing Team Document Library*. Although this isn't a required change, it sure makes WSE document libraries just a tiny bit easier to find and manage.

- ✔ **Versions of documents:** As you see in Chapter 12, WSE document libraries store multiple versions of a document, by default; every time a document is edited, WSE stores the older version in the document library for future reference. You can turn this feature off, if you don't need multiple versions of a document to be preserved, by clicking the Disable Document Versioning radio button.

- ✔ **Document workflow features:** Workflow is a WSE feature that optionally enables new documents to be routed to certain members of the team before they are published and made available for the wider team to see. Click the Enable Workflow radio button to turn on this feature (it's off by default, unlike document versioning), and then use the Approvers field to determine the name of the group to whom those draft documents will be sent.

- ✔ **Document locking:** This feature is turned on by default, and is one that you probably should leave turned on. When a member of the team edits a document, for example, WSE automatically locks the document so that no one else can edit that document at the same time.

Managing access control

Click the Access Control button to manage the permissions associated with the document library.

The Resource Permissions form, shown in Figure 11-17, appears. Use this form to edit the role membership for the document library. If, for example, you need to add a person to the Manager role, click the Edit Role button on the right, and then use the Add button on the Edit Manager form to select the name of the person, people, or group who will be granted Manager access to the document library.
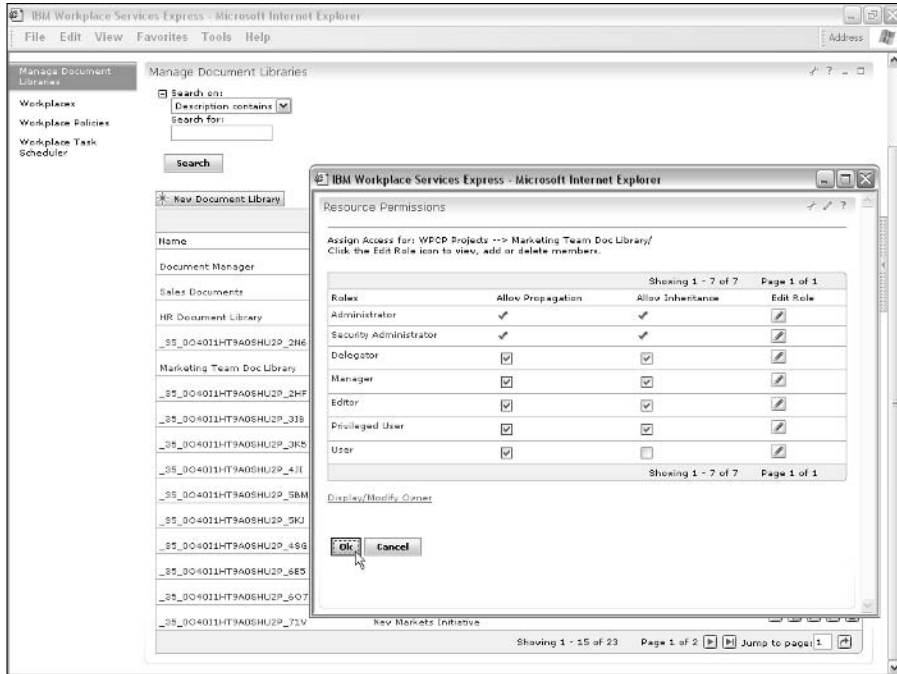
Figure 11-17:
Managing a
document
library's
access
settings.

Chapter 12

Working with Documents

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*J*ust about every team or project has a need to produce content. No matter how big or small your company is, and no matter what business you're in, you probably churn out documents by the gazillion.

Adding and managing content — such as word-processing documents, spreadsheets, presentations, PDFs, images, and anything else you can think of — are two of the most common activities in a team space, and this chapter is where you should start if you want to create, edit, and manage content.

Because teams spend so much time cranking it out, IBM Workplace Services Express puts a lot of effort into making it easy to create and share content. WSE also provides some pretty cool and innovative ways for a content-based team to work together. Think of the built-in IM functions, or the ability to send users a link to a document, which I discuss in Chapter 11.

Improving Productivity with Document Management Tools

One of the central promises that WSE makes is about team productivity — making it easier for teams to do what they need to do in less time. In the simplest case, that might be making it easier for a person (you or a member of your team) to produce a new document; just reducing the amount of time and clicks it takes to get a new document published and shared, for example.

But there's more to team productivity than saved mouse clicks. Lots of teams, whether they realize it or not, come together to make decisions; they decide how to market new products, how to respond to a customer RFP, or how to deal with some new market opportunity or competitive threat. So if you consider all the clicks WSE saves teams as they create their documents, and add to that the streamlined way teams can operate by having the documents and content they need so easily accessible from WSE document libraries, you'll find WSE just makes every project go down smoother.

Microsoft Office, anyone?

Have you ever heard of Microsoft Office? Just kidding. Since Microsoft Word's debut in 1989, Office has pretty much taken the world by storm, and is the de facto standard for producing documents, spreadsheets, and presentations.

Not surprisingly, WSE works very well with Office, with built-in features that allow you to use Office to create documents, which you then share with WSE.

However, Office isn't always the answer — particularly for people who use WSE to consume (read) content; that's why, for example, WSE automatically *renders* Office documents. WSE transforms Office documents into Web pages, so that readers don't need Office to see what's in those files. Most would agree that Office excels (pardon the pun) at producing documents, spreadsheets, and presentations, but sometimes Office just isn't necessary. Here are a few reasons it's so great that WSE works around Microsoft Office:

✔ **No need to buy Office for employees who will never use it:** As you see in Chapter 11, many teams have more readers than they do editors. For example, say you have 100 people using a human resources document library; maybe only 10 of those 100 produce content for the HR library. All the rest are just readers. Buying those other 90 people a copy of Microsoft Office just doesn't make sense, at least not for the sake of accessing the HR document library. (Of course maybe you'd buy them Microsoft Office for other reasons.)

✔ **If you have Linux, Office won't work anyway:** Sometimes Office isn't the right answer for producing documents. More and more companies use Linux for their desktops, and those people all need another choice, because Microsoft Office doesn't run on Linux.

✔ **Team members outside your company can still read documents:** WSE teams probably include employees of your company, along with one or two members who aren't — maybe a business partner or a customer. In that scenario, it's impractical to assume that your business partner has the same version of Office that your employees use, and it's unwise to demand that your customer upgrade.

Microsoft Office is clearly the best choice for many companies and in many situations. (Most of this book was written in Microsoft Word, by the way.) But it's not the only game in town. WSE broadens your horizons a bit, content-wise, so that you can think about other ways teams interact with document and content.

Shifting your document paradigm

Isn't paradigm an obnoxious word? Fancy nomenclature aside, the point is that you create documents a little differently with WSE than you do without it. That's not to say that you use Word any differently than you have for the past ten years. Rather, it's the process that's different.

Say that you need to write a new draft of a press release to share with your team. In the old days (before the dawn of WSE, circa 2004), you would start Word in your computer and write your opus. Then you'd save the file (Opus.doc) on your computer and either print it (gasp!) or, more likely, e-mail the thing around to your team as an attachment.

What's different in the world of WSE is just that first step — when you sit down to write the press release, you start with WSE. You still use Word to create the press release, but because you begin the document in WSE, it is automatically saved in the document library; it's automatically uploaded to the server — and that means, among other things, that you don't have to e-mail it around.

There are a million reasons why having documents on the server is good for business: Among other things, you can save the steps of having to upload it, reduce e-mail traffic, and make the press release immediately available to the team. Putting a Word document directly into a document library means you can use workflow to get the document approved and use WSE version tracking to preserve changes, too.

Using Microsoft Office to Create Documents

Figure 12-1 shows a document library; as you can see, you can click the New button to create a new Microsoft Office document.

The next section describes the steps for creating a new document; see Chapter 11 for steps to import an already-existing document into a WSE document library.
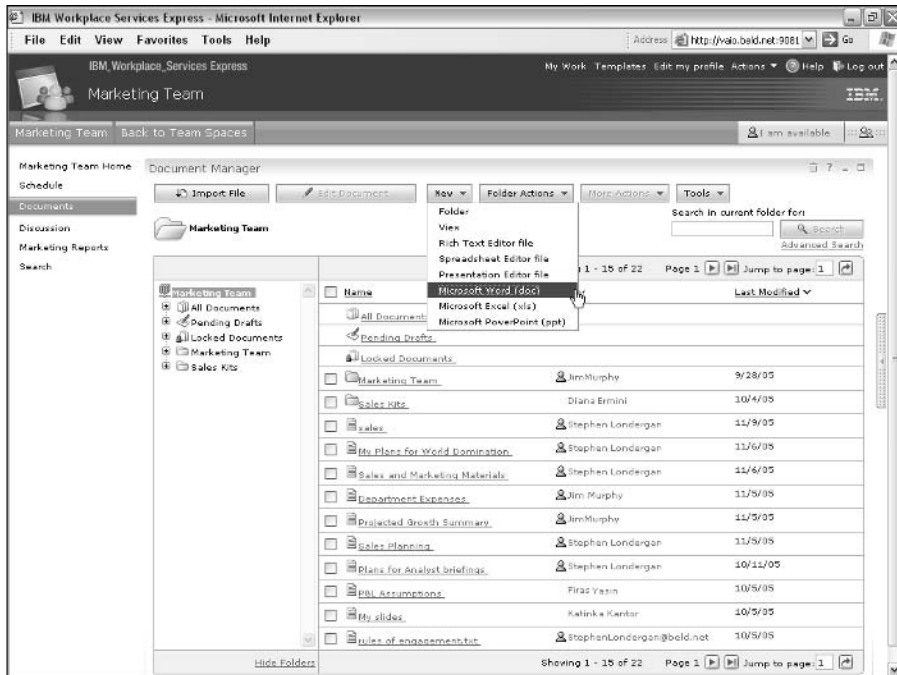
Figure 12-1:
Creating
a new
Microsoft
Office
document
in WSE.

The following steps show you how to create a new Office document:

1. **Open the document library to which you want the new document to be saved.**

2. **Open the folder, if appropriate, in the library where you want the document to be saved.**

   You can always move a document to a different folder, after the fact, as you can see later in this chapter.

3. **Choose New⇨Microsoft Word (.doc).**

   If you're creating a spreadsheet, choose Microsoft Excel (.xls); if you're creating a presentation, choose Microsoft PowerPoint (.ppt).

   The New Document form appears.

4. **Enter the title for the document in the Title field.**

   WSE automatically fills in the filename for you, based on what you enter in the Title field. Although you can change the filename, you always interact with the document by its Title, which means that filenames in WSE are a lot less important than you're used to them being.

5. **Optionally, enter a comment about the document in the Description field.**

6. **Choose the document's language from the Document Language list.**

   WSE isn't multilingual; choosing the language is useful if you (or someone on your team) want to limit a search to documents in a particular language.

7. **Click the Open File button.**

   Although this button's name is 100 percent technically accurate, I wish this button said "Start Word and let me edit my document," because that's really what it does.

8. **If the Document Manager plug-in dialog box is displayed, click OK.**

   After you click OK, Microsoft Word (or Excel or PowerPoint) starts. If you don't see this dialog box, the Microsoft application opens on its own.

9. **Create your document, build your spreadsheet, or do whatever you need to do in Office.**

10. **When you're finished with the document, choose File⇨Save and File⇨Exit.**

    Microsoft Office closes, and you return to the WSE New Document form.

    As you can see in Figure 12-2, there's one more step to finish the document and upload it to the document library.

Figure 12-2:
The last
step is
to publish
the new
document.

Local file has been saved on your computer. Click Publish or Save as Private Draft to store the file in the document library.

11. **Click the Publish button.**

    When you click the Publish button, watch for the Saving to Document Manager dialog box, which is shown in Figure 12-3.

    You may not see a Publish button; you may see a Submit for Approval button, instead (see Chapter 11 for more on *workflow* and the Submit for Approval button).

Figure 12-3:
WSE
uploads
your new
document
to the
document
library.

REMEMBER
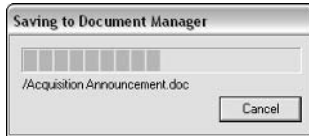
Depending on the size of the file you created, it may take a few moments for WSE to upload the file. At this stage, WSE renders the document so that people can read it even if they don't have Office. You don't have to do anything special — WSE takes care of converting the file automatically.

When the upload and conversion process is complete, you're returned to the folder you selected in Step 2, and you see your new document listed, in all its glory, among all the rest.

TIP

When all is said and done, WSE stores your document two separate ways. First, the Office file (.doc, .xls, or .ppt file) is attached to and stored in the document library, should you need to edit it later. Second, the file is converted to a Web page so that people can read it with their browser. I include this tip in the interest of full disclosure, and for intrepid readers who wonder how they'll be able to edit their Office documents after they're uploaded and converted for the team. Fear not, dear reader; your file is there.

TIP

If you want to save the document without making it available to the team — maybe it's lunch time, or maybe you're at the office and want to save and upload your draft so that you can edit it later, from home — click the Save as Private Draft button in Step 11. If you save document as a private draft, the team can't see it; only you can.

Creating Documents with the Document Editors

IBM Workplace Services Express includes a way to create simple documents without using Microsoft Office. Using these tools, you can create simple word-processing documents, spreadsheets, and presentations. These tools are officially called the *productivity components,* or more simply, the *editors.*

If your goal is to write the great American novel, or a complex, multipage statistical analysis spreadsheet, the productivity components aren't for you. You'd be better served by Microsoft Office. If, however, you and your team have humbler intentions, and need to produce a simple document quickly, WSE's built-in editors may be just the ticket. As a group, the editors are the cornerstone of WSE productivity; imagine the team with a mixture of Windows users and Linux users, or a team with some people who work at your company and some people who don't.

Creating documents with the WSE editors

Creating a document with the editors is very much the same as the steps outlined in the previous section "Using Microsoft Office to Create Documents," except that in Step 3 you choose New⇨Rich Text Editor File, New⇨ Spreadsheet Editor File, or New⇨Presentation Editor File.

If you're creating a new file with one of the WSE editors, when you click the Open File button in Step 7, the built-in editor window opens.

With Linux operating systems, WSE uses a special applet to communicate with your workstation, so you need to install a supported Java Runtime Environment (JRM) on your browser. Chapter 19 offers more information.

Make sure your browser allows pop-up windows. WSE editors won't run if the automatically generated windows are blocked.

I've noticed when I travel that the TV remote control at hotels always has a sticker on the back that says `This device will not work outside of Motel 8`. Sometimes the remote is even bolted to the table. (Maybe you get to stay in better hotels.) Similar rules apply to the WSE editor files; they only work in WSE. You can't, for example, use the Spreadsheet Editor to save a spreadsheet locally on your own hard drive. The files you create with WSE's rich text, spreadsheet, and presentation tools have to be saved in a WSE document library.

Introducing the Spreadsheet Editor

WSE's Spreadsheet Editor functions much like any other spreadsheet; it organizes information in rows and columns. The individual cells in a row or column are named by the coordinates (A1, B7, and so on), and each cell can contain a label, number, or formula.

Spreadsheets are all about the formulas you can put in a cell; what makes spreadsheets special is that when you change a number somewhere in the spreadsheet, the effect on the entire spreadsheet can be seen immediately.

The Spreadsheet Editor has formatting commands to determine how the contents of a cell will be displayed — bold, font size, number of decimal places, and the like.

Figure 12-4 shows the WSE Spreadsheet Editor. You can find a list of spreadsheet formulas and functions in Appendix F.

Figure 12-4:
The Spreadsheet Editor is just the ticket when your team needs to create simple spreadsheets.
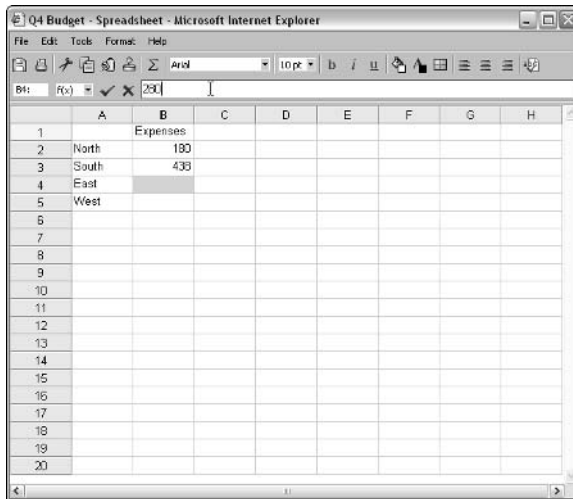
Using the Spreadsheet Editor's Edit bar

The Spreadsheet Editor's Edit bar contains buttons for formatting cells in your spreadsheet. Here's a set of buttons and what they do:

✔ **Save:** Saves the spreadsheet.

✔ **Print:** Prints the spreadsheet.

✔ **Cut:** Cuts a selection to the Clipboard.

✔ **Copy:** Copies a selection to the Clipboard.

✔ **Paste:** Pastes a selection from the Clipboard into the selected cell(s).

✔ **Copy Format:** Copies the format of selected cells (but not the contents).

✔ **Sum:** Adds the selected cells.

✔ **Bold:** Applies **bold** to the selected cell(s).

✔ **Italic:** *Italicizes* the selected cell(s).

✔ **Underline:** <u>Underlines</u> the selected cell(s).

✔ **Background Color:** Chooses the background color for the selected cell(s).

✔ **Text Color:** Changes the font color.

✔ **Cell Border:** Adds a border to a cell.

✔ **Align Left:** Makes contents of a cell flush left.

✔ **Center:** Centers the contents of a selected cell.

✔ **Align Right:** Makes a cell flush right.

✔ **Check Spelling:** Checks the spelling of the selected cell(s).

Changing the size of a spreadsheet

When you create a new spreadsheet, by default the spreadsheet contains eight columns (A through H) and 20 rows. Choose File⇨Set Size to use the Set Size dialog box to make the spreadsheet larger or smaller. You can also choose Tools⇨Insert Row or Tools⇨Insert Column to add rows and columns. Similarly, choose Tools⇨Delete Row or Tools⇨Delete Column to individually add and delete rows and columns.

Of course, the smaller the spreadsheet the better.

Using the Spreadsheet Editor's menus

The Spreadsheet Editor's Menu toolbar provides drop-down menus that offer the following options:

- ✔ **File:** Save, Set Size, Print, and Close.
- ✔ **Edit:** Cut, Copy, Paste, Paste Values, Clear, Fill Down, Fill Right, and Macros.
- ✔ **Tools:** Insert rows and columns, delete rows and columns, change row heights and column widths, sort the spreadsheet, and hide the spreadsheet grid lines.
- ✔ **Format:** Change cell's appearance.
- ✔ **Help:** Contains the Help Center.

Using the spreadsheet macros

WSE spreadsheets can contain *macros* (mini bits of code that automate a particular sequence of commands or spreadsheet operations), and WSE includes a series of logical statements and operators to help build them. A *macro* is a mini computer program (that looks a lot like regular old JavaScript). Macros are incredibly helpful in spreadsheets because you can set them up to tabulate a series of numbers automatically, for example.

The Macro Editor is available from the Edit menu.

Introducing the Rich Text Editor

WSE's Rich Text Editor is used to create documents, as you can see in Figure 12-5.
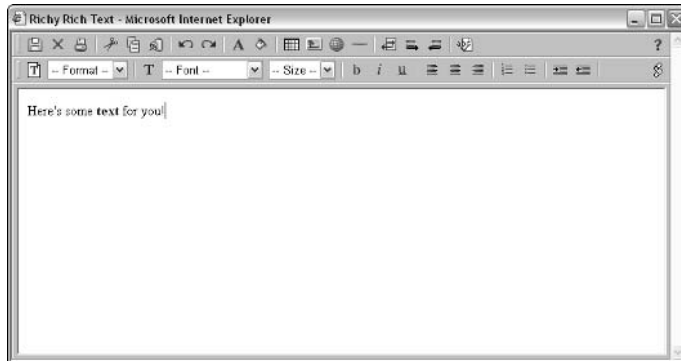
Figure 12-5: WSE's built-in document editors are used to create and edit simple documents.

Using the Rich Text Editor's Edit bar

The Rich Text Editor's Edit bar contains buttons for formatting and working with text in a document:

✔ **Save:** Saves the document.

✔ **Close:** Closes the editor, gives you the option to save your changes, and returns to the new document in WSE.

✔ **Print:** Prints the document.

✔ **Cut:** Cuts the selection to Clipboard. (Some browsers may not support this option.)

✔ **Copy:** Copies the selection to Clipboard. (Some browsers may not support this option.)

✔ **Paste:** Pastes the selection to Clipboard. (Some browsers may not support this option.)

✔ **Undo:** Undoes the last thing you did.

✔ **Redo:** Redoes whatever you just undid. (Make up your mind, will you?)

✔ **Text:** Changes the text color; you can also use Ctrl+Shift+G.

✔ **Fill:** Changes the background color; you can also use Ctrl+Shift+J.

✔ **Insert Hyperlink:** Inserts a hyperlink into your document.

✔ **Insert Picture:** Inserts an image.

✔ **Insert Table:** Inserts a table with rows and columns.

✔ **Insert Line:** Inserts a horizontal rule.

✔ **Switch Text Direction:** Switches the document's direction.

✔ **Switch Text Direction to Right:** Switches document direction for the selection from left to right.

✔ **Switch Text Direction to Left:** Switches document direction for the selection from right to left.

✔ **Spell Check:** Checks the document's spelling.

✔ **Question Mark:** Displays the WSE Help window.

✔ **Format:** Selects the format of the text, such as Normal, Heading 1, Heading 2, and so on.

✔ **Bold: Bolds** selected text.

✔ **Italic:** *Italicizes* text.

✔ **Underline:** Underlines text.

✔ **Align left:** Aligns the selected text to the left.

✔ **Center:** Centers the selected text.

✔ **Align Right:** Right-aligns the selected text.

✔ **Numbered List:** Puts a selection in a numbered list.

✔ **Bulleted List:** Puts a selection in a bulleted list.

✔ **Indent:** Indents the selection to the right.

✔ **Remove Indent:** Removes the indentation of the selection.

✔ **HTML:** Shows the HTML source for a document.

TIP

Unlike the Spreadsheet Editor, the Rich Text Editor doesn't have menus. If you prefer not to use the mouse, press Shift+Control+M to access a special set of word-processing icons. Press the Tab key to navigate among the icons and press Enter to select the one you want.

Introducing the Presentation Editor

WSE's built-in Presentation Editor helps you create simple presentations, *álà* PowerPoint. WSE presentations are made up of pages, and the Presentation Editor has buttons to create, edit, arrange, sort, and display them. There are two parts to each presentation page: the title area (which usually consists of words) and the content area (which usually consists of words and images).

The overall look and feel of a presentation is determined by the presentation's *master page,* which is a lot like a template; it sets the style of all the pages in the presentation. WSE includes the following master pages:

- ✔ Default Master
- ✔ Basic Master
- ✔ Title Master
- ✔ Ruled Master
- ✔ Wood Master
- ✔ Blocks Master
- ✔ Grandma's Garden
- ✔ Chocolate Bananas
- ✔ Let's Watch TV

Working with a presentation

You can view a presentation in one of three ways: Outline, Sorter, and Screen Show. Figure 12-6 shows a presentation in Outline mode, and as you can see, WSE provides a tree view of the presentation's pages, on the left, and a draw area on the right which you use to edit the selected page.

Click the View toolbar's buttons in the lower-right corner of the Presentation Editor to switch between the three view modes. In Outline and Sorter modes, you can also click the buttons in the Arrow toolbar to navigate between the pages in the presentation.
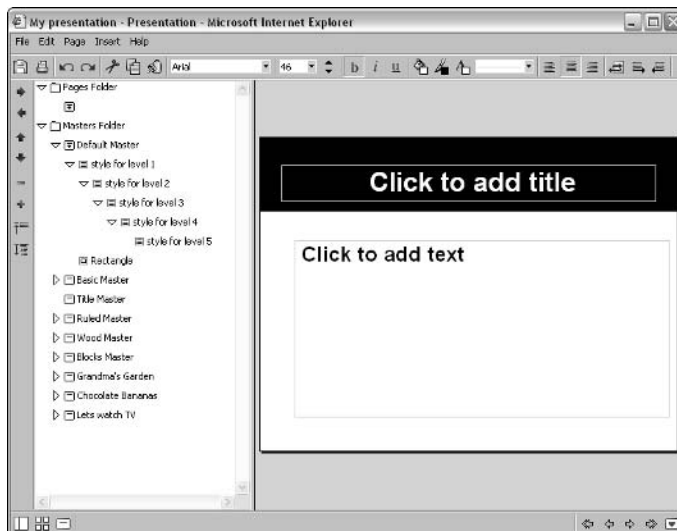
Figure 12-6:
This editor is used to create and edit simple presentations.

Using the Presentation Editor's buttons

The Presentation Editor's Edit bar contains buttons for formatting the individual pages of your presentation:

✔ **Save:** Saves the presentation you are working on.

✔ **Print:** Prints your resentation.

✔ **Undo:** Takes away your most recent change.

✔ **Redo:** Repeats your most recent change.

✔ **Cut:** Cuts the selection to a Clipboard.

✔ **Copy:** Copies the selection to a Clipboard.

✔ **Paste:** Pastes the selection.

✔ **Bold: Bolds** the selection.

✔ **Italic:** *Italicizes* the selection.

✔ **Underline:** Underlines the selection.

✔ **Fill Color:** Fills in the color of a selected element.

✔ **Line Color:** Changes the color of a selected line.

✔ **Font Color:** Changes the color of the selected text.

✔ **Align Left:** Aligns the selection to the left.

✔ **Center:** Centers the selection.

✔ **Align Right:** Aligns the selection to the right.

✔ **Switch Document Text Direction:** Toggles text direction for the entire document. This only affects documents in Arabic and Hebrew languages.

✔ **Text Direction Left to Right:** Toggles text direction of the selected section from left to right. This only affects documents in Arabic and Hebrew languages.

✔ **Text Direction Right to Left:** Toggles text direction of the selected section from right to left. This only affects documents in Arabic and Hebrew languages.

✔ **Indent:** Indents selected item.

✔ **Remove indent:** Removes indent of selected item.

✔ **Move Up:** Moves selected item up the Outline view.

✔ **Move Down:** Moves selected item down the Outline view.

✔ **Collapse:** Collapses the selected item in Outline view.

✔ **Expand:** Expands selected item in the Outline view.

✔ **Collapse All:** Collapses all the items in Outline view.

✔ **Expand All:** Expands all the items in Outline view.

REMEMBER

Handling (or not handling) file compatibility issues

The files that you create and share with Office are different than the files you create and share with the WSE editors, and in the current version of WSE you can't mix and match between Office and the editors.

In other words, you use Office to edit Office files and you use the productivity components to edit productivity component files, but you *don't* use Office to edit non-Office files or use the productivity components to edit nonproductivity component files.

This discussion is about *editing,* not *reading* documents. Anyone with the correct WSE access rights can read any document, no matter where or how it was created.

About Editing Documents, After the Fact

Sometimes you can edit a document, and sometimes you can't. Usually you can edit your own documents, and, depending on the document library's access settings, you may able to edit teammates' documents, too. However, sometimes you can't edit documents at all, not even the documents you created yourself.

You can easily tell whether you can edit a document, because when you open it you either see the Edit button or you don't.

Here are some reasons you might be prevented from editing a document:

- ✔ The document library may not be set up to let you edit any of the documents, because of the nature of the library itself.
- ✔ The document is *locked* — either someone else on your team is editing it, or someone manually locked it to prevent further changes.

Assuming you can edit a particular document — because you have the correct access and the document isn't locked — the following sections cover a few of the additional things you can do with the document in addition to editing its actual content.

Editing a document's properties

The most important part of a document, of course, is its content. But there's more to a document, as far as WSE is concerned.

You can edit the document's properties — the fields that WSE tracks about every document — such as the document's name, description, and so on. This content *about* a document is sometimes called *metadata*. Document properties can be very important for making sure that other team members can find the document, especially when they search for it. The more information you include in the property fields, the more likely it will be that other users can access and use the content in the document.

To edit a document's properties, whether it was created with Office or a WSE editor, follow these steps:

1. **Locate and open the document you want to change and click the Edit button.**

   The Edit Document form appears.

2. **Use the Edit Document form to change the document's title, description, or preferred language.**

3. **When you're finished, click the Publish, Submit for Approval, or Save as Private Draft button, as appropriate.**

The document is saved and closed.

Replacing a document

On occasion you may need to replace a document, lock, stock, and barrel. This isn't something you do often, but sometimes you have a file on your local hard drive that you need to upload in place of a document that's already in the library. Needless to say, the existing document is, well, *replaced* — permanently — so proceed with caution. You can not replace a document that has been saved as a pending draft.

Use these steps to replace an existing document in a document library with one from your computer:

1. **Locate and open the document you want to replace.**

2. **Click the Replace button.**

The Replace Document form appears.

3. **Click the Browse button and select the file on your hard drive that you want to upload as the replacement.**

4. **Click the Publish, Submit for Approval, or Save as Private Draft button, as appropriate.**

The new document appears in the document library and the old one vanishes.

Moving or copying a document

Although the steps for copying and moving a document are almost the same, the results are, of course, different. When you copy a document, you end up with two identical versions of the document in two different folders. When you move a document, the document is taken out of its original folder and deposited in the folder you specify.

Use these steps to copy or move a document in a document library:

1. **Locate and open the document.**

2. **Choose More Actions⇨Copy or More Actions⇨Move.**

The Copy to Folder (or Move to Folder) form appears.

3. **Select the destination folder where you want to put the copied or moved document.**

4. **Click OK.**

   The document is copied or moved to its new location.

Deleting a document

The steps to delete a document deserve a little special consideration, given the inherent danger. Think twice about deleting a document, because the document is removed from the WSE document library permanently and irrevocably.

Use these steps to remove a document from a document library:

1. **Locate and open the document.**

2. **Choose More Actions⇨Delete.**

   The Are You Sure You Want to Delete This Document dialog box appears.

3. **If you are 110 percent certain you will never need the document again, click the OK button.**

   Click Cancel to change your mind and leave the document right where it is.

Converting documents

You can't use Microsoft Office to edit a document, spreadsheet, or presentation that was created with WSE productivity components, and you can't use the productivity components to edit Office documents, either.

WSE does include a built-in conversion mechanism intended to help you convert files back and forth, from whatever format the document is in (Microsoft Office for example) to WSE format, and vice-versa.

When you convert a document, the converted document replaces the original document. Therefore, you lose the original document.

WSE's document conversion process is far from perfect. Before converting a document, it's a good idea to make a copy of the file (see "Moving or copying a document," earlier in this chapter), and then put the copy through the converter. That way, if you don't get the results you expected from WSE's conversion, you still have the original.

Use these steps to convert a document:

1. **Locate and open the document.**

2. **Choose More Actions➪Convert.**

   A list of formats to which the document can be converted appears.

3. **Select the format into which you want the document to be converted from the Create New Version As field.**

4. **Click OK.**

   WSE converts the document's internal file format, so that it can be edited by the other program.

Managing access to a document

In Chapter 11, I show you how to use WSE roles to determine which folders in a document library are available to which users. You can follow similar steps to determine which members of a team can view or edit a document.

The most common reason for hiding a document from certain members of the team is because it's not finished. WSE handles this scenario for you, by letting you save documents as private drafts, so if you've already saved a document as a private draft, you don't need to do anything else. Nobody else can see the document until you publish it.

Hiding documents isn't difficult, and can be just the ticket when certain documents are intended for certain people. That said, you will likely find that managing access to entire folders, rather than individual documents, is easier and less time consuming.

As I discuss in Chapter 11, WSE documents inherit their access settings from their parent folder, so rest assured that protecting an entire folder from certain individuals protects the documents in the folder, too.

Use these steps to change a document's access:

1. **Locate and open the document.**

2. **Choose More Actions➪Set Access.**

   The Resource Permission form appears, showing the roles that have been defined for the document library.

3. **To remove access for the people assigned to a certain role, click the check box next to the role, or click the Edit button in the last column to view or change the people who are assigned to the role.**

4. **Click OK.**

Working with versions

Versions

WSE has options for working with multiple versions of a document. Much like WSE's workflow capabilities, versioning has to be turned on as part of the document library's settings, which I explain in Chapter 11.

As you can see in Figure 12-7, versioning is a handy way to keep track of how a document has changed through a collaborative editing process; the basic idea is that a given entry in a document library might, in fact, have several versions. One version is special, called the *current version,* and it's the one and only version that is displayed when a member of the team clicks the document's title in the list view. Other versions of a document are accessible via a <u>Versions</u> link that appears at the top of WSE document versions.

TIP

When you have a version-enabled document library, you can view earlier versions of a document, save a new version of a document, change which version is the current version, and download a version to your computer.

Viewing versions

To work with versions, open the document in question and click the <u>Versions</u> link at the top of the document.

Creating a new version of a document

To create a new version of a document — essentially making a new copy of the document — follow these steps:

1. **Open the document.**

2. **Click the <u>Versions</u> link.**

   The Document Versions list appears.

3. **Click the New Version button.**

   The New Version form appears.

4. **Enter a description of the version — what makes this version different from all the rest — in the Note field.**

5. **Click OK.**

   WSE copies the document you selected in Step 1, and creates it as a new version. If there are multiple versions of a document, they are listed in descending order so that the most recently created version is always at the top of the list.

You can tell which version is the current version because it is the one that is listed as *active* in the Status column of the Versions list.

Changing which version is the current version

You can select a version and make it the current version — in effect promoting it so that it is the one that team members see when they open the document. Follow these steps:

1. **Locate and open the document.**

2. **Click the <u>Versions</u> link.**

   The Document Versions list appears.

3. **Click the version you want to promote.**

   The selected document version opens.

4. **Click the Promote to Current Version button.**

5. **Click OK.**

   WSE copies the document you selected in Step 1 and creates it as a new version. If there are multiple versions of a document, they are listed in descending order, so that the most recently created version is always at the top of the list.

Downloading a version

Download a version if you want to create an extra copy of the document on your hard drive for your own or backup purposes. Follow these steps:

1. **Locate and open the document.**

2. **Click the <u>Versions</u> link.**

   The Document Versions list appears.

3. **Click the Download button.**

4. **Select the location where you want to save the document (**`C:\My Documents`**, for example).**

5. **Click Save.**

   The document version is saved to your hard drive, and it is still accessible through WSE. If the version available through WSE is edited, your copy won't be changed.

Working with draft documents

There are two kinds of draft documents in WSE, *private drafts* and *pending drafts.* Any document saved as a draft is not yet ready for a wide audience. Private drafts are documents that you yourself have saved for your own purposes; pending drafts are documents that are in a *workflow process* and have been submitted to an approver. In either case, draft documents are not visible to the entire team.

Working with private drafts

The first, and most common, kind of draft document, is your own. You can save a document as a private draft if you're finished editing it for the moment (maybe it's lunchtime) but you're not ready to release the document to the whole team.

Every WSE document library contains a special folder, called Private Drafts, in which you store such documents.

Figure 12-8 shows a private draft document from a Private Drafts folder. You have already noticed, no doubt, that a draft document has a couple of special buttons at the top:

✔ **Accept:** When you click this button, the document is no longer considered to be a draft document and no longer appears in your Private Drafts folder. More important, the document assumes its rightful place among the rest of the documents in the document library, so that the whole team has access to it. Click the Accept button when your private draft document is finished and ready to go.

✒ **Delete Draft:** When you click this button, the draft document is gone for-ever and ever.

✒ **Edit:** When you click this button, the document opens so that you can continue working on it.

As you can see in the figure, a private draft document also has two special tabs the top of the page: Current Document and Private Draft.

Imagine that you come to work on Monday and write a new press release. You finish the document late Monday afternoon, and you save and publish it so everyone can read it. On Wednesday, you decide to revise the press release. You click the document's Edit button and start editing away. But you're a might bit peckish as noontime rolls around, so you save the docu-ment as a private draft and head off to the cafeteria.

In this little story, as far as WSE is concerned, there are two versions of the press release. There's the version that you finished and published on Monday, and there's the version you've been working on all morning Wednesday. That's what those tabs are about; the Current Document tab is where you (and the team) can find the published document from Monday. The Private Draft tab is where you (and you alone, because no one else can see it) can find your draft after lunch.
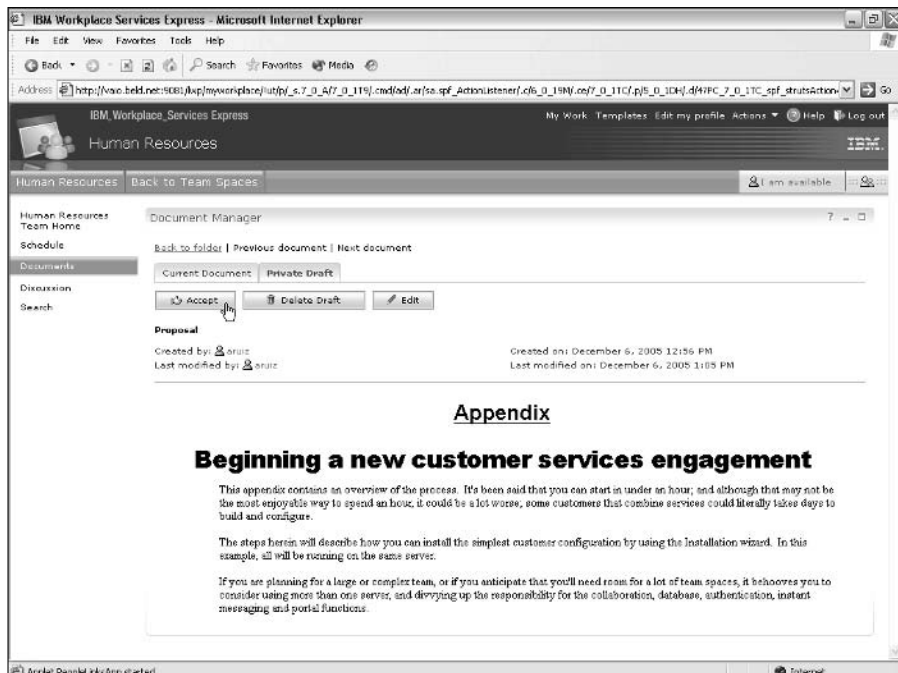
Figure 12-8:
Editing
a draft
document.

Working with pending drafts

Although every document library has a Private Drafts folder, only some have a Pending Drafts folder.

Some document libraries are set up to use *workflow.* In such a document library, every document goes through an approval process before it's available to the whole team. This workflow business is either turned on for a given document library, or it isn't. See Chapter 11 for details on how to enable workflow and how to identify who on the team is an *approver.*

When you work in a document library that has workflow turned on, team members can't publish a document when it's finished. Instead, the author submits it for approval. Doing so uploads the file, and converts it, too. But WSE submits the document for approval, by putting it in the Pending Drafts folder of the person who has been identified as the approver. Only after it's approved is the document published for others on the team to see.

Working with a pending draft is much the same as working with a private draft, with two notable exceptions. A pending draft includes both an Accept button and a Reject button at the top of the page.

As an approver, you get to decide whether a document is ready to see the light of day. If you click the Accept button, the document is removed from the Pending Drafts folder (where only the approver and the author could see it) and is posted to the document library at large.

If you click the Reject button instead, the document isn't published at all, but is instead returned to the author for more work.

Although there can be multiple people who are identified in WSE as approvers, the first one to approve or deny a submitted draft wins. In other words, the workflow in WSE isn't complex or smart enough to manage complex approval chains. It's a simple first in, first out kind of affair.

Managing a Document Library

If you're the manager of a team space that contains a document library, you may very well want to fine-tune the way the document library functions. You can tweak a few document library settings so that the document library does exactly what you want it to do. Log in to WSE with administrator rights, open the document library, and click the portlet's Configure button to use the configure form, shown in Figure 12-9.
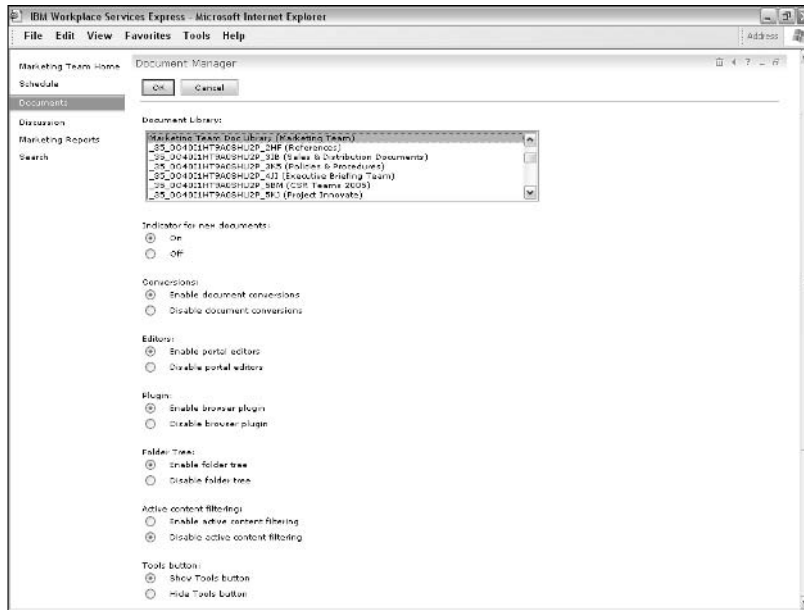
Figure 12-9:
Changing a document library's configuration settings.

As you can see in Figure 12-9, the form has eight fields you can use to config-ure the document library:

✔ **Indicator for New Documents:** This field determines whether or not recently added documents are described as such with that cute little red New! descriptor. In document libraries with frequent updates, enabling this option is a cool way to let everyone know which documents have been changed recently. In document libraries that don't have frequent updates, this feature isn't worth the trouble.

✔ **Conversions:** This field determines whether the WSE conversion feature can be used in the document library. See "Converting documents," ear-lier in this chapter.

✔ **Editors:** This field disables or enables the document editors. Disabling them means that the team can't use WSE's built-in productivity compo-nents to create simple documents, spreadsheets, and presentations. By default this feature is enabled.

✔ **Plug-in:** Disabling the use of plug-ins forces people to use the WSE edi-tors to create and edit documents, and means that people on the team can't use external programs (such as Microsoft Office) to create and edit content. By default, this feature is enabled.

Attention Linux users: An applet is used to communicate with your client file system, so Linux users must have a supported Java Runtime Environment installed.

✔ **Folder Tree:** Disabling the folder tree means that the document library won't display that easy-to-navigate folder tree on the left, when a person opens the document library. It's a matter of preference, of course, but I can't imagine a reason to turn this off.

✔ **Active Content Filtering:** This field controls a security option that prevents certain kinds of documents from displaying potentially harmful content. Turning Active Content Filtering on automatically removes certain JavaScript, Java, and ActiveX components when a document is viewed. If the content and documents in your library come from trustworthy sources — usually, people on your team — you probably don't have to worry about changing this setting. If, on the other hand, your libraries contain a lot of external content that you get from other places, you might consider turning this feature on.

✔ **Tools Button:** This field allows or prevents people from downloading and installing the Document Manager desktop components on their computer. Check out Appendix B for more information about the desktop components.

✔ **Default Folder:** Use this field on the off chance that you want to change the root folder of the document library.

You can also click the portlet's Edit button to use the Edit form. As Figure 12-10 illustrates so effectively, there are five fields that further fine-tune how a document library functions.
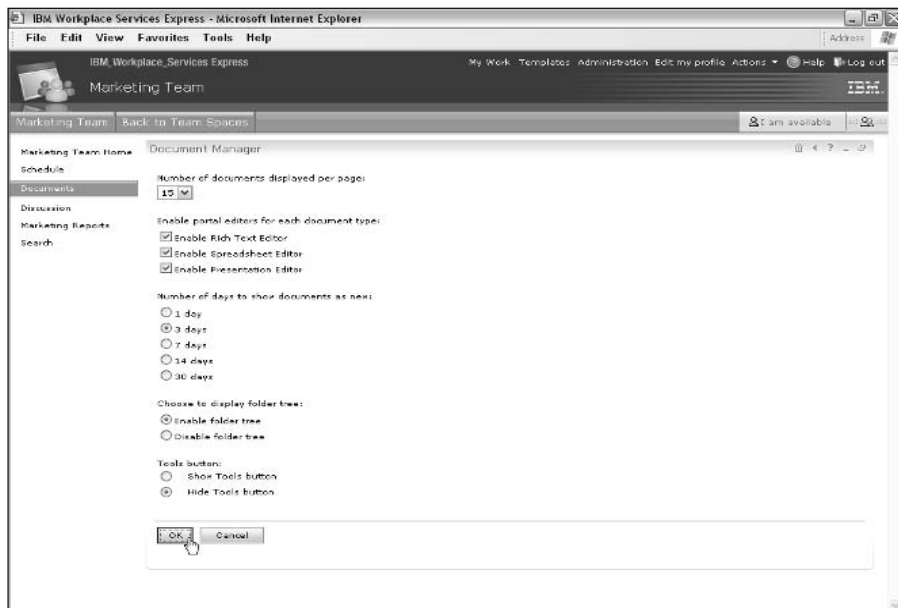
Figure 12-10:
Editing a document library.

Use these fields if you need finer control over how your document library works:

- ✔ **Number of Documents Displayed per Page:** Although most document libraries display 15 documents in the list view; you can change this to 5, 25, or 50 documents.

- ✔ **Enable Portal Editors for Each Document Type:** Pick and choose which of the WSE productivity components your team can use to create content.

- ✔ **Number of Days to Show Documents as New:** If, and only if, you turned on the Indicator for New Documents field described in the previous list, use this field to determine how long WSE considers a document to be new. Your choices are 1 day, 3 days, 7 days, 14 days, or 30 days.

- ✔ **Choose to Display Folder Tree:** Disabling the folder tree means that the document library doesn't display that easy-to-navigate folder tree on the left.

- ✔ **Tools Button:** This field allows or prevents people from downloading and installing the desktop components.

Click OK when you are finished changing the document library's configuration.

Part V
Making IBM Workplace Services Express Your Own

The 5th Wave   By Rich Tennant

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"...so if you have a message for someone, you write it on a piece of paper and put it on their refrigerator with these magnets. It's just until we get our e-mail system fixed."

In this part . . .

In the old days, making a portal suit your own particular tastes and needs was a daunting affair, because it meant rolling up your sleeves and delving into the world of portlets, Cascading Style Sheets, and Java programming.

With the advent of tools like IBM Workplace Services Express, however, setting up portals got a whole lot easier. WSE is flexible, so you can customize it as you see fit; because you can use your web browser to customize the program, everything is a whole lot easier. WSE takes care of all the technical lifting, so you can focus on the job at hand, without becoming a Java programmer in the process.

This part of the book is devoted to making WSE work the way you want it to. Like the burger joint says: Have it your way.

Chapter 13

Working with Forms

*F*orms make IBM Workplace Services Express special. When you drag a form out of the Portlet Palette and drop it on your team space's home page, it's easy to forget how much work and time you're saving yourself, and your team.

First, consider all the technology behind each form, which you get to take for granted. You (and your team) can use a form to collect information about how to get to a meeting with a customer without thinking about all the whys and wherefores of how Java, DHTML, Cascading Style Sheets, and all the other technical stuff are used to set up the form, control its layout, *and* make sure it works for Windows and Linux users.

Second, the forms in WSE are infinitely modifiable; without any in-depth programming or Web development know-how, you can add fields to WSE's forms, create and edit form views, add charts to a team space or page, and so on.

REMEMBER

Traditionally, portals have been impractical for a lot of companies (particularly smaller ones) because portals require so much technological heavy lifting. But WSE in general and forms in particular remove that complexity.

Chapter 13 is all about how you modify forms to suit your own particular needs or preferences.

Putting Forms in Context

You can use forms in WSE without ever changing a thing. You may find that the forms that come with WSE work just great for your purposes. On the other hand, you may decide that a tweak here or a change there might make the forms you use even better suited to your team's purposes. There are a couple of reasons you might modify a form, and just like everything in WSE, your ability to do so is based on your access level.

Here are a couple of really good reasons for changing forms:

✔ **To meet your team's specific needs.** The most common, immediate, and practical reason you'd modify a form is to make it suit the needs of a particular team or project. Say you added the Customer Contacts form to your team space's home page. Maybe your company tracks customers by a company number, so you want that number to be tracked by the Customer Contacts form, as well. Adding a new field to the Customer Contacts form in your team space is very easy to do.

✔ **To meet your organization's long-term needs.** An admittedly less-frequent scenario is that you want to edit a form's template. This scenario requires a long-range perspective. Say you want to make that aforementioned Customer Number field something that is *always* included in the Customer Contacts form, no matter who in your company uses it. You're showing a little foresight by planning ahead so that if someone creates a new team space tomorrow or next month that happens to use the Customer Contacts form, he or she doesn't need to add this field. Furthermore, the field not only appears in the form always, but always in the same place.

REMEMBER

Foresight is a wonderful thing of course, but sometimes it's hard to come by. If you notice that you are making the same modifications to a given form every time you use it ("Wait, didn't I do this last month?"), you should decide to save yourself the trouble *next month* by making the change to the template *this* month.

TIP

You can modify a given form in a given team space on a one-time basis to meet the needs of a particular team. Or, thinking a little more broadly, you can modify a form's template, so that any time anyone uses that form, your modifications are included.

You can also take a form that you have customized and turn it into a template. This is an ideal situation if you have made a bunch of modifications to a form, because you don't have to make those same changes again to the template. Also, you still have both the original version of the template and the customized version to choose from in the future.

REMEMBER

Understanding instances

WSE uses the word *instance* to distinguish between one place where you have used a given form and another place where you have used a given form. For example, you might have two instances of the Customer Contacts form in a team space, on two different pages. Changing an instance of the form in one part of the team space *doesn't* change it in its other location. If you subsequently add a new instance of the Customer Contacts form to a team space, the new instance will *not* have the new field, either.

Similarly, if you modify a template, your changes take effect and appear in the template every time you use it in the future. However, WSE 2.5 doesn't support *design inheritance* between a form template and the instances of that form that you've previously used in WSE. In other words, if you add a new field to the Customer Contacts form template, any existing places where you have already used the Customer Contacts form are *not* affected and *don't* include the new field.

Working with Forms

WSE forms are small enough, and easy enough, to change, so you don't need to spend a lot of time planning how a form will work. Most people take a let's-try-it-and-see-if-we-like-it approach to creating and customizing forms.

That said, each form is used in four different ways, and keeping them in the back of your head is a good idea as you add fields, design the views, and so on. I show you how to change the views in the following section, "Modifying a form in a team space."

You view forms in a variety of ways. You use the same portlet to summarize, read, edit, and graph items.

Figure 13-1 shows a List view, in which WSE summarizes the documents that have been entered in the form. The list usually consists of documents, organized in a table; each row contains information about the particular item, and each column represents a particular field. Depending on the number of fields the form has, a view may not show all of the fields (there simply may not be enough room).

Figure 13-1:
A form's views are used to summarize the items that have been entered.
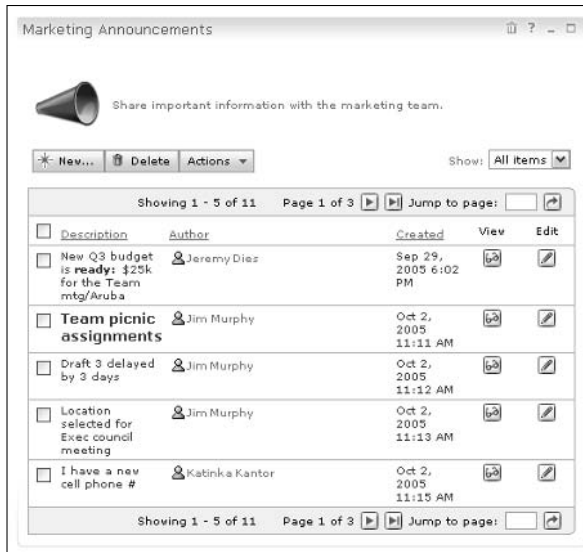
Figure 13-2 shows the same form being used to read an item. Unlike the List view, when you read an item, all of the fields that are part of the item appear.

Figure 13-2:
You can use a form to read an individual item and display all of the fields.
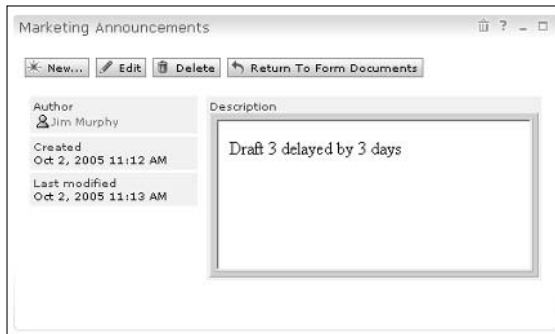
Using a form to edit an item is a whole lot like using a form to read an item, except that when you read an item you can't change the values in the fields, and when you edit an item, you can (see Figure 13-3).

Figure 13-3: Forms are also used to add and edit items.
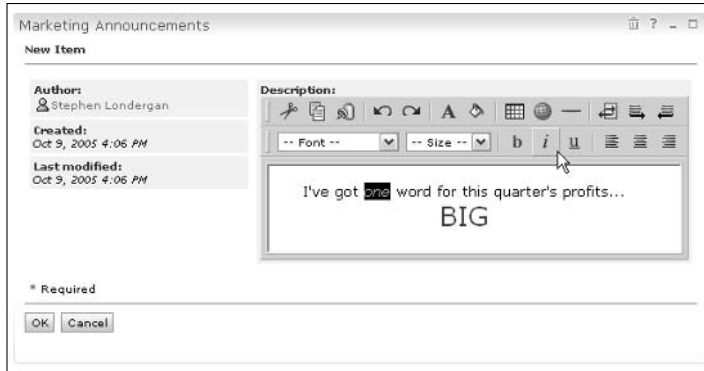
Figure 13-4 shows a special view, called a chart. When you choose this view, WSE summarizes any list of items in either a bar or pie chart.

Figure 13-4: Forms summarize items in a bar or pie chart.
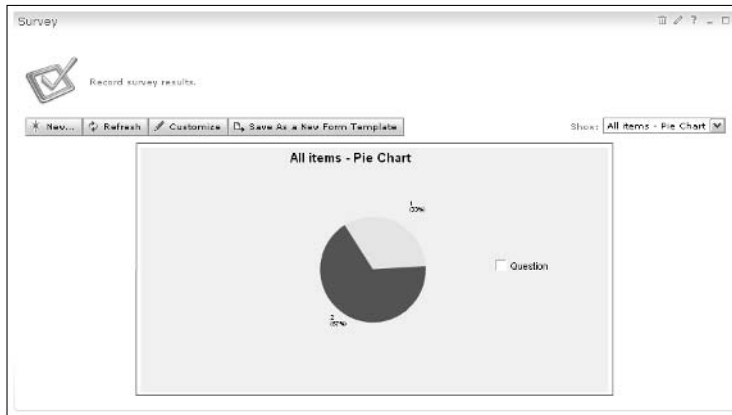
Modifying a form in a team space

To modify a form in a team space, open the team space and click the Edit button for the form you want to change. Figure 13-5 shows the dialog box for editing a form.

Use these three tabs to customize your forms.
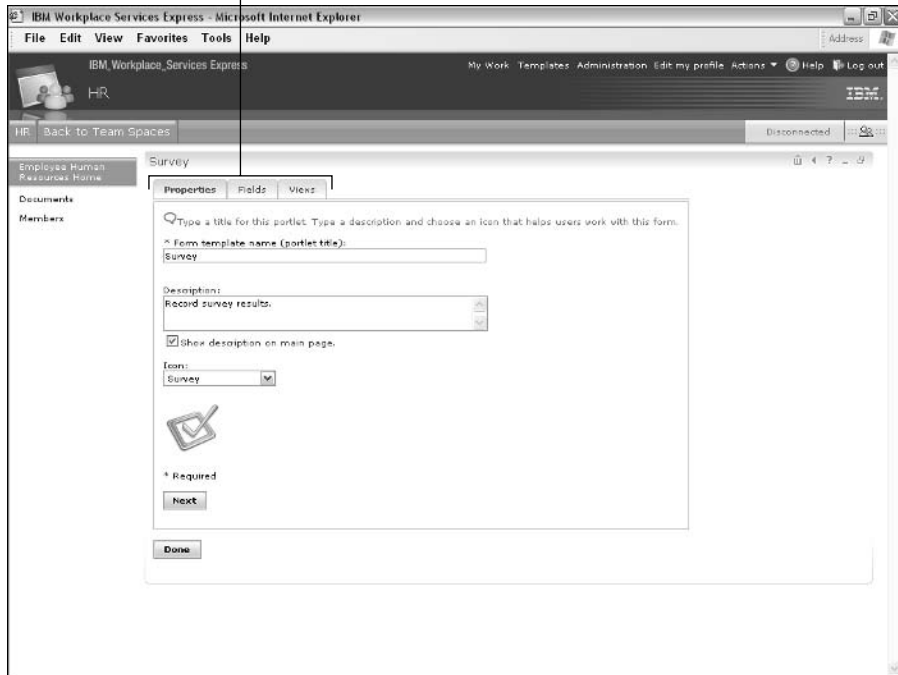
As you can see in the figure, there are three tabs you can use to change the way a form works:

- ✔ **Properties:** This tab helps you determine the name that is displayed at the top of the portlet and the icon that is used for the form.
- ✔ **Fields:** Use this tab to manage the fields that are part of the form, the type of information they each contain, and their placement on the screen.
- ✔ **Views:** With this tab, you can control the form's views, including the columns that view will or will not display. You can also create charts with this tab.

Modifying a form that is already in use in a team space is a matter of clicking the Edit button to open the Edit Form dialog box, and using whichever of these three tabs is appropriate; click the Done button when you are finished making changes to the form.

REMEMBER

When you edit a form in a team space, your changes affect that instance of the form, and none other. See the sidebar, earlier in this chapter, "Understanding instances," for more information.

Modifying a form template

Use these steps to change a form template so that the changes you make to the template are available each and every time you use the form:

1. Click the Templates link in the toolbar.

The Application Template Library appears.

2. Click the Navigator's Form Template Library button.

The Form Template Library appears, listing all of the form templates that are available.

3. Click the name of the template you want to change.

TIP

If the name of the form template you want to edit doesn't appear as a link, the form template is locked. You can use the Unlock button on the right to unlock the form template. If you can't unlock the form template, someone else may be modifying it already; consult your teammates to see who is working on the form, if necessary.

As you can see in Figure 13-6, modifying a form template works much like modifying a form in a team space, except that the page includes a Preview Main Page button, a Save and Close button, a Save As button, a Cancel button, and a Help button at the top of the screen.

4. Click the Properties, Fields, or Views tab to determine what and how the form will present it contents.

TIP

As you design a form's fields, layouts, and views, get in the habit of using the Preview Main Page button to get a look at how your final product will look.

5. When you are finished changing the form template, click the Save and Close button.

Your changes apply to any subsequent uses of that form.

REMEMBER

Your changes take effect and appear in the template every time you use it in the future, but WSE 2.5 doesn't support *design inheritance* between a form template and the instances of that form that you've previously used in WSE. See the sidebar, "Understanding instances," earlier in this chapter, to find out more.
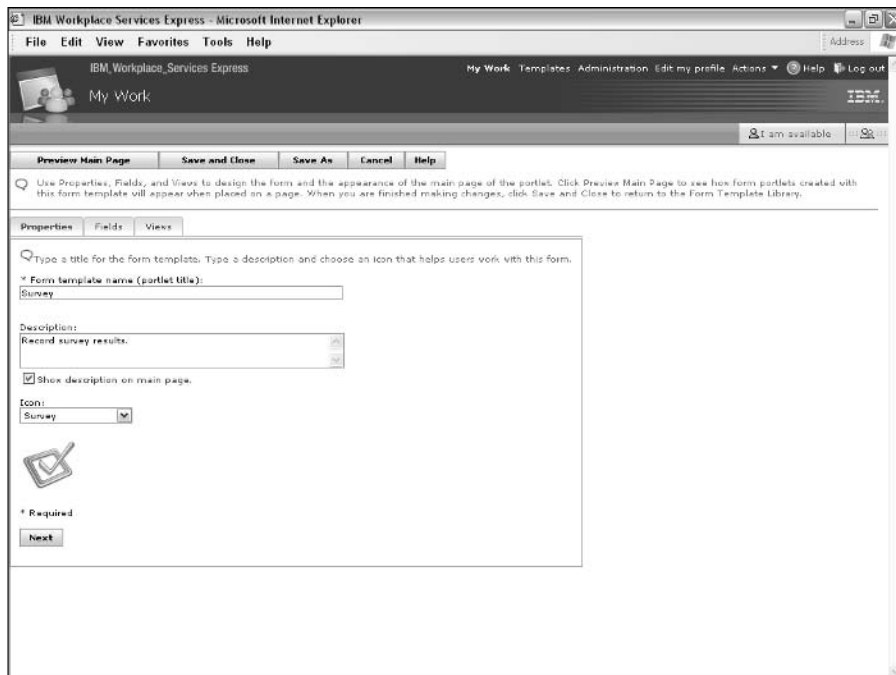
Figure 13-6:
Modifying
a form
template.

Creating a new form template

Rather than starting from scratch, WSE jump-starts a new form by copying
the fields, properties, and views of an existing form template, which you then
modify to suit your needs. (If you're not sure where to start, see the handy
table in "Finding Out WSE's Built-in Form Templates," later in this chapter.
The table contains a description of each form template, including its fields
and views.)

Use these steps to create a brand-new form template:

1. **Click the Templates link in the toolbar.**

   The Application Template Library appears.

2. **Click the Navigator's Form Template Library button.**

   The Form Template Library is displayed.

3. **Click the New button.**

   The New Form Template form appears.

4. **Enter the name for the new form template in the Form Template Name field and select the form on which your new form will be based from the Starting Point drop-down menu.**

   The form name you enter must be unique.

5. **Click OK.**

   The new form template's properties are displayed.

6. **Use the Properties, Fields, and Views tabs to modify how the form works, what fields it contains, and how its views function.**

7. **Click the Navigator's Save and Close button when you are finished.**

   As soon as you create your new form template, it is available for use in any team space or on any WSE page.

You probably want to put your new form template to immediate use in a team space or on a WSE page. Don't be surprised, however, if your new form template is not listed in the Portlet Palette; you will probably have to use the Add button at the bottom of the Portlet Palette to get your new form template to show up.

Setting a form template's roles

By default, you can assign one of two roles to a form template:

✔ **Template Editors:** Users assigned to this role can edit the form template and change the template's roles.

✔ **Template User:** Users assigned to this role can drag and drop the form onto a page.

If there are other people in your company or organization that need to modify the form template, you should add them to the Template Editors role; anyone who needs to use the form (to add the form to a page, for example) should be assigned the Template Users role.

By default, no one is assigned to either of these roles when you create a new form template. That's why it's important to modify a template's roles as soon as you can so that other people can use it.

Use these steps to assign the roles for a form template:

1. **Click the <u>Templates</u> link on the toolbar.**

   The Application Template Library appears.

2. Click the Navigator's Form Template Library button.

The Form Template Library appears.

3. Find the form template whose roles you want to modify and click the Template Roles button.

4. Use the Template Roles form, shown in Figure 13-7, to manage the form's two roles.

5. Use the Role field to select either Template Editors or Template Users, and then use the Add and Remove buttons to determine who has the selected role. Click Add.

The Directory Search dialog box appears, listing the names of the people or groups who will be assigned the selected role.

In the figure, I have assigned the Template Users role to *Everyone,* which is the name of a group defined in my WSE directory.

Just because a person or group is designated a Template Editor doesn't mean that he or she is a Template User; and Template Users aren't necessarily Template Editors. You have to assign each role explicitly.

6. Click the Close Template Roles button when you are finished assigning the form template's roles.
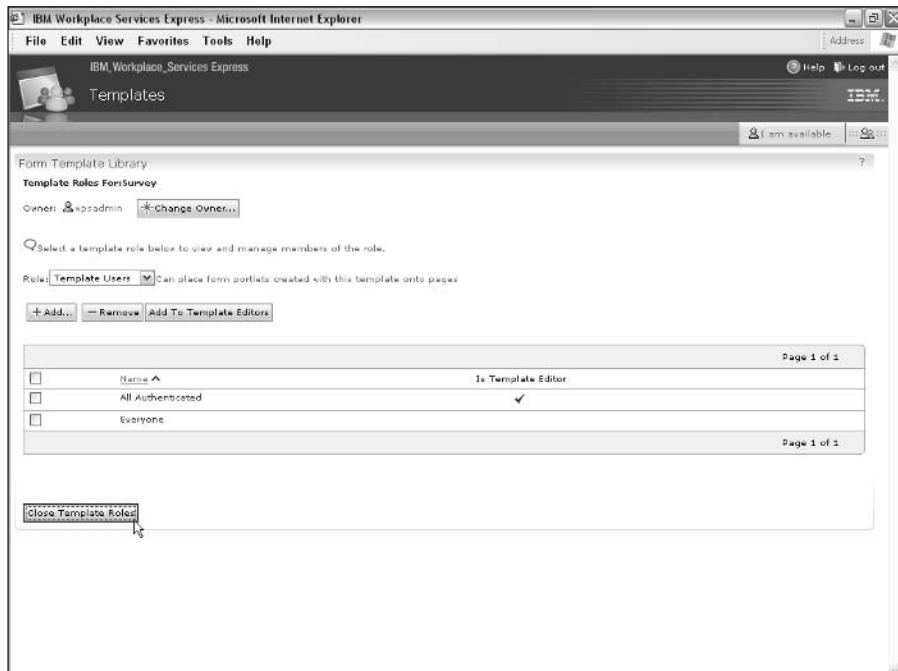
Figure 13-7:
Setting
a form
template's
roles.

Creating a new form template from an existing form

Perhaps you have modified a form in a team space, and the modifications you made have worked out so great that you want to turn your form into a form template.

Almost every form has an Actions button, from which you can select the Save As a New Form Template option. You give the new form template a name, and you're in business. The new form template appears, for example, in the Form Template Library, and is available in the Portlet Palette.

Working with Fields

The most basic element of every WSE form is a *field,* which is one snippet of the item, such as the customer's last name, the date the contract was opened, whether or not the invoice has been printed, and so on. WSE fields may behave a little differently, depending on how you're using them.

For example, consider the File Attachment field type. If you edit an item that includes a File Attachment field, you get to use the built-in Browse button to upload a file from your file system to WSE. If you are instead reading an item, a File Attachment field displays the name of the attached file, and includes a built-in link so that you can download it. When you include a File Attachment field in a view, however, it displays the name of the file that was uploaded.

WSE supports 16 different field types in all (skip ahead a bit to Figure 13-9 if to see them):

- ✔ **Plain-Text, Single-Line:** One line of words.
- ✔ **Plain-Text, Multiple-Line:** Like a single-line field, but this field has (you guessed it) more lines. This field type can have between 2 and 99 lines worth of information.
- ✔ **Rich-Text, Multiple-Line:** Can contain character formatting (bold text, for example), tables, different font sizes, URLs, and so on.
- ✔ **On-and-Off Control:** More commonly known as a *radio button field;* displays a check box with two possible choices, only one of which you can select. Appropriate for yes/no, is-it or isn't-it situations.
- ✔ **Single-Item Selection:** Works like an on-and-off control field, but has a list of possible choices, only one of which you can select.
- ✔ **Multiple-Item Selection:** Works like a single-item selection field, but can have more than one item selected.

Manager:

- ✔ **Date:** Includes a built-in calendar that you can click on to pick a date.

- ✔ **Time:** Stores a time value, and includes a control to make entering a time easy.

- ✔ **URL:** Holds URLs that can be clicked to open the Web page in question.

- ✔ **Name:** Holds the name of a person from your organization's directory. Also includes a built-in dialog box to look people up.

- ✔ **File Attachment:** When you view this field, it automatically helps you download the attached file. When you edit this field, it includes a Browse button that uploads a file from your hard drive to the WSE system.

JimMurphy

- ✔ **Item Author:** A calculated field that automatically displays the name of the person who created the item in question.

Created:
Nov 13, 2005 11:15 AM

- ✔ **Creation Date:** A calculated field that records the time and date that the item was created.

Last modified:
Dec 4, 2005 5:32 PM

- ✔ **Modification Date:** A calculated field that displays the last time the item was edited.

- ✔ **Rich Text:** Not a field, *per se,* but a way to enter static information that appears on the form, such as special form instructions, section titles, and the like.

- ✔ **Section Header:** Similar to rich text, but doesn't have any rich text for-matting options.

Adding and managing fields

You can (assuming you have the appropriate access) add a new field to an instance of a form or to a form template. The steps for each are slightly different.

Working with the fields on a form

Use these steps to add, edit, reorder, or remove a field from a form:

1. **Open the page in the team space that contains the form you want to change.**

2. **Choose Actions⇨Customize.**

   The form's properties screen is displayed.

3. **Click the Fields tab.**

4. **Create and manage the order of the fields on the form.**

   See "Managing fields," later in this chapter.

5. **Click Done when you're finished.**

Adding a field to a form template

Use these steps to add, edit, reorder, or remove fields on a form template:

1. **Click the <u>Templates</u> link in the toolbar.**

   The Application Template Library is displayed.

2. **Click the Navigator's Form Template Library button.**

   The Form Template Library is displayed.

3. **Click the name of the template you want to change.**

4. **Click the Fields tab.**

5. **Use the steps described in the following sections to create and manage the order of the fields on the form.**

6. **Click the Done button when you are finished.**

Managing fields

Figure 13-8 shows the Field Summary list, which is used to create and manage the fields on a form or form template.
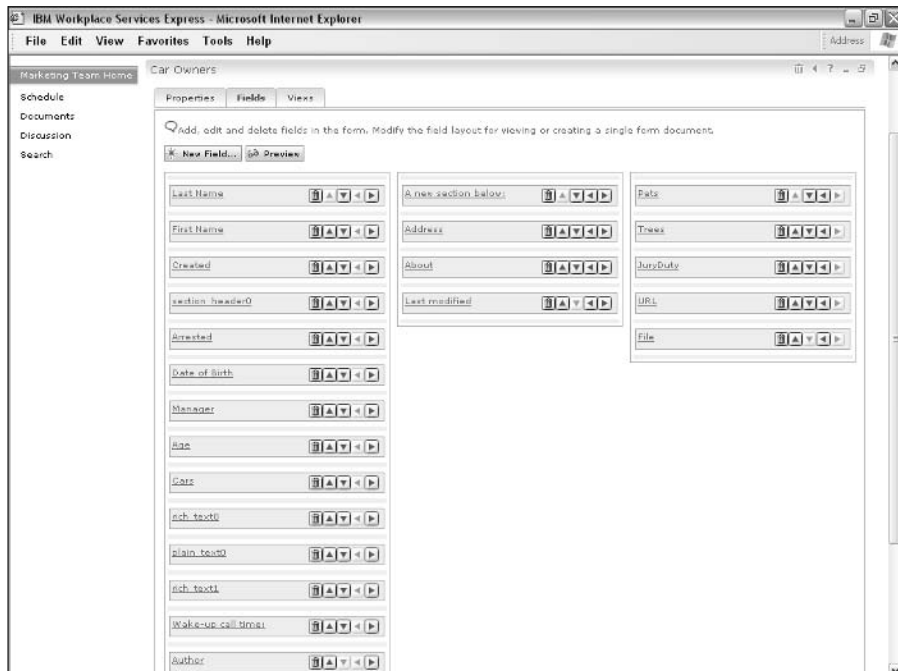
Figure 13-8: Managing the fields on a form or form template.

As the figure illustrates, the fields on a form are laid out in up to three columns; the fields in each column determine how the form displays its contents when you use the form to read or edit a document. Here are some tips for managing fields:

- Use the up, down, left, and right arrows to control where a particular field will be displayed; you can reorder the fields in a particular column, or move them from one column to another.

- Use the Trashcan icon to remove the field altogether; or click the field's name to change its properties and type.

- Because this page looks so dissimilar to the version of the form you'll actually use, click the Preview button early and often to see how the form will look when it is being used to read or edit an item.

- Select the field by which a matching item will be listed when someone searches WSE with the Field list.

- Click Done when you're finished changing the fields around.

Adding a new field

New Field... Defining a new field is a pretty painless process that involves choosing the field's type, entering the field's properties, and determining where the field will appear on the form.

Figure 13-9 shows the New Field form, which appears when you click the New Field button.

Follow these steps after you click the New Field button:

1. **Select the type of information that you want the field to hold.**

2. **Click Next.**

3. **Use the form to define the properties for the field.**

   See Figure 13-10. Which properties, exactly, you set are determined by the field type you chose in Step 3. For example, the Rich Text field has a width and a height setting that a Date field does not.

4. **You can (but do not need to) change the default name that WSE supplies.**

   Every field has a unique field name, which is required, that is automatically generated by WSE. This is the name by which the field will be known internally by WSE.

Figure 13-9:
WSE
supports 16
different
field types.
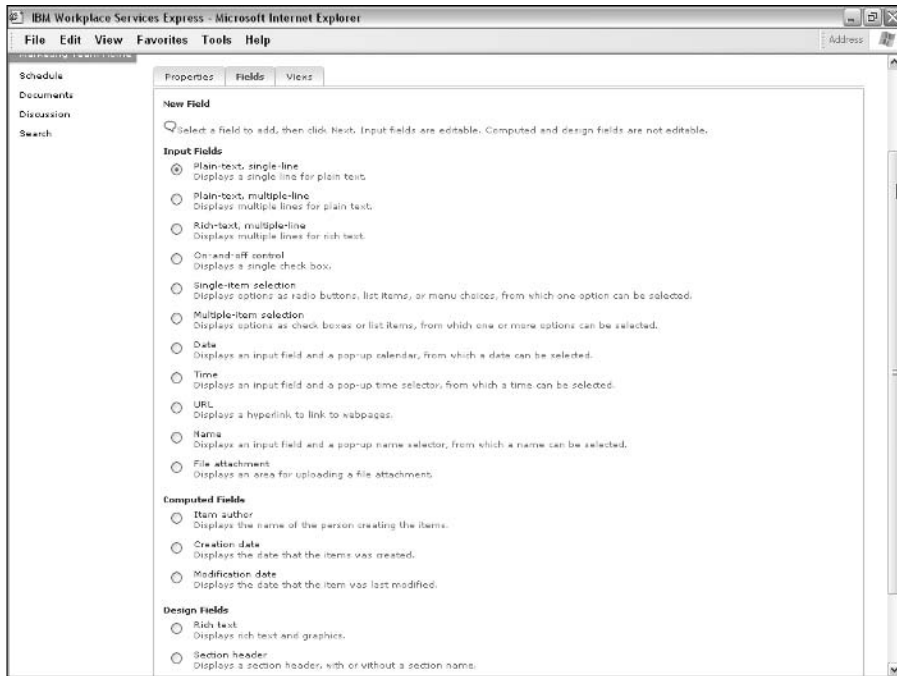
Figure 13-10:
Adding a
new field to
a form.
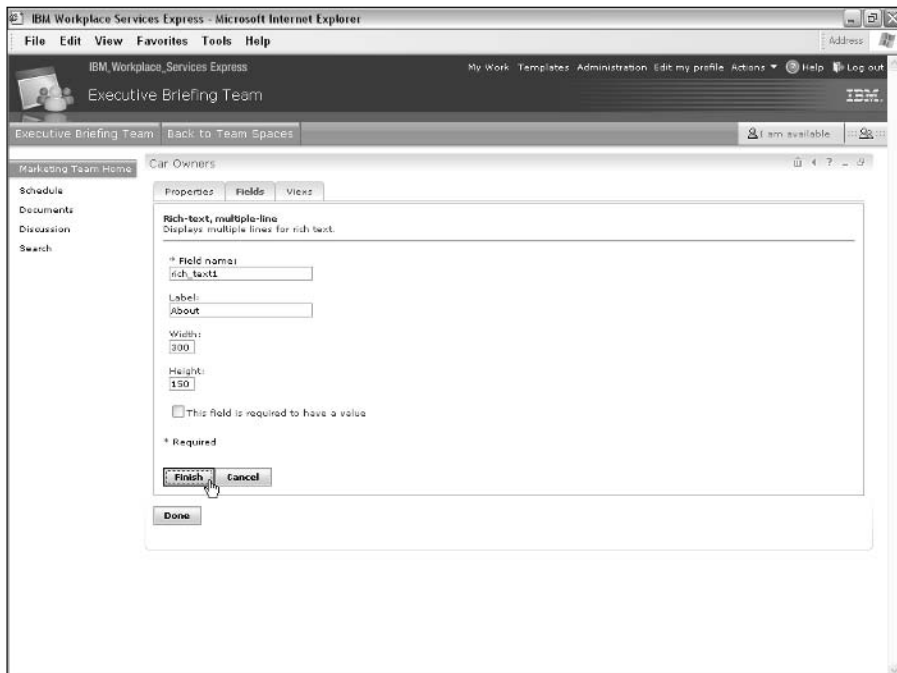
5. **Add a descriptive label.**

   Every field includes an optional label, which is what WSE uses on the form, as the field's column heading in views, and so on. Because there are rules for field names (spaces aren't allowed, for example), it's a good idea to use a more descriptive and easier-to-read label for every field you define.

6. **Add default values if necessary.**

   Many fields include a default value, in which you can enter a word, phrase, date, or whatever. The value is entered in the field, automatically, whenever someone creates a new document.

7. **Click the This Field Is Required to Have a Value check box if you want to make a field mandatory.**

8. **If you have nothing else you want to do, see the section, "Previewing and completing the process of adding and modifying a new field," later in this chapter, to wrap up the process.**

   If you have additional changes you want to make to your new field, read the following section, "Modifying a field you've added."

Modifying a field you've added

You can make other changes to a field you have added to a form. For example, six of the field types have additional attributes:

- ✔ Plain-Text, Single-Line fields require you to enter a size and a maximum length of between 1 and 99 characters. The Size attribute determines how big the field will be when displayed on the form; the Maximum Length attribute prevents anyone from entering a value longer than the length you specify.

- ✔ Plain-Text, Multiple-Line fields ask you to specify the columns and rows for the field, all the better to determine the number of characters (width) and height of the field's contents.

- ✔ Rich-Text, Multiple-Line fields include settings for the field's width and height, which you enter in pixels. The default value is 300 pixels wide and 150 pixels tall.

- ✔ On-and-Off Control fields allow you to determine whether the field is checked or unchecked, by default.

- ✔ Single-Item fields present a list of choices; you must enter the list of possible values in the choices box, and (optionally) choose one to be the default by entering it in the next field. This field type also asks you to

Knowing about other special fields

The Item Author, Creation Date, and Modification Date fields are special because they are calculated automatically by WSE and aren't editable. Putting one of these three fields on a form still requires you to name the field and give it a label, however.

The Design fields types — Rich Text and Section Header — are also special. These fields aren't editable either, and are used to help organize your form. For example, if you want a big bold heading on your form, you could create a Rich Text field on the form for the heading. Similarly, a section header can be used to divide a form into logical sections, to improve the organization and readability of a form that has a lot of fields. Rich Text and Section Header fields are, in effect, static; their contents cannot be changed, and their contents do not change from one item to the next.

choose a user interface for the field. For example, do you want the field to list possible values as radio buttons, in a list box, or in drop-down menu? Answer this question with your choice here.

Screen real estate is often at a premium, so the list box option is often the best choice for a Single-Item Selection field, since it's the smallest.

✔ Multiple-Item fields are similar to the list of possible choices and default values you see when you use a Single-Item field; however a Multiple-Item field's user interface setting allows you to either display the field as check boxes or as a list box.

Previewing and completing the process of adding a new field

To complete the process of adding a new field, follow these steps:

1. **Click the Done button when you are finished changing the fields.**

   WSE automatically puts the new field at the bottom of the first column, which means the field appears in the lower-left corner of the form when you use it to read, add, or edit a document.

2. **Click the arrow buttons next to the field's name if you want to make the new field appear higher in the column, or if you want to move it to another column altogether.**

3. **Optionally, click the Preview button to see how the form looks when it is used to read or edit an item.**

4. **Click the Done button when you are finished adding new fields.**

A form is used to summarize, display, and edit information, and usually doesn't have the luxury of being the only form or portlet on the page. Most pages have several other forms and portlets surrounding your little beauty. In particular, Rich Text fields can get you in trouble, because they are big. Aesthetically speaking, try to keep your forms small, and the number of fields in them low.

Working with Views

Every form (and form template) has at least one *view*. Views allow you to summarize and organize a form's documents in a simple, easy-to-read format. Most views are essentially tables, containing rows and columns of information. Views usually display some, but not all, of the fields in a given form, and have built-in tools for sorting the items.

A special kind of view is called a chart, which you can use to provide a simple pie chart or bar chart summary of documents.

Views display all of the documents in a given form. If you want to see only certain documents, use WSE filters (which I discuss in Chapter 7) to limit which documents are shown in a particular view.

Figure 13-11 shows WSE's Customer Contacts form, which comes with a view called All Items. This particular view lists all the documents that have been entered in the Customer Contacts form, and summarizes them to list the contact's last name, first name, work e-mail address, and work phone number.

Figure 13-11: Views are used to summarize a form's documents.

TIP

You can modify the views that come with WSE, or you can create your own. If, for example, you added a new Customer Number field to the Customer Contacts form, you'd likely want to modify the All Items view to include that new field.

Or maybe you need a new view for the Customer Contacts form because your team needs to list each contact's e-mail addresses, as shown in Figure 13-12.

Figure 13-12:
Create your own views to summarize documents any which way you want.

You can either add a new view (or customize an existing one) to a form, or permanently change a form's template.

Although most views are shared — available to a wide audience — there may be times when a *private view* is useful, too. Private views are available only to you; no one else will even know that your private view exists. Private views cannot be added to a form template.

Creating a new view

You can add a new view to a form or to a form template. The most common reason to create a new view is to add some fields that the other views do not display.

To add a new view to a form, open the page that contains the form you want to change, and choose Actions⇨Customize. To add a new view to a form template, open the form template on the Form Template Library. Then follow these steps:

1. **Click the New button.**

    The View Properties form appears.

2. **Name the new view and determine the display options.**

   For example, the new view may be shared or private, or appear as a table or as a chart. You can't have two views in the same form with the same name.

   After you create and save a new view, you can't change its properties. You can't change a view's name, make a shared view private, or switch a table view to a chart view. You can only delete it.

3. **Click Next.**

4. **Select the columns that the new view will display, and the order in which the columns will be displayed.**

   By default, a new view includes all the columns that have been defined for the form, which is usually too many.

   Figure 13-13 shows the View Definition screen. As you can see, WSE displays each column that the view will display.

5. **Use the arrow buttons to reorder the columns, and use the – button to remove a column from the view altogether.**

   If you remove a column and then change your mind, you can select it from the list and use the Add Column button to put it back.

   Click the column heading to change the way the column is described in the view. For example, in Figure 13-13, the first column will display the contents of the Display Name field; however, I changed the column heading to say Name, just because I thought that was a little more user friendly.

6. **Click Finish when you're done selecting the new view's columns.**

7. **Click Done to return to the form.**

   When you finish adding a new view to a form, it is automatically added to the form's Show list, as you can see in Figure 13-14.

Modifying a view

You can modify a view to change the columns it displays, change their order, or change the order in which the views are listed in the form's Show list.

Use these steps to modify an existing view:

1. **Open the page that contains the form you want to change.**

2. **Choose Actions⇨Customize.**

   To change a view in a form template, open the form template in the Form Template Library.
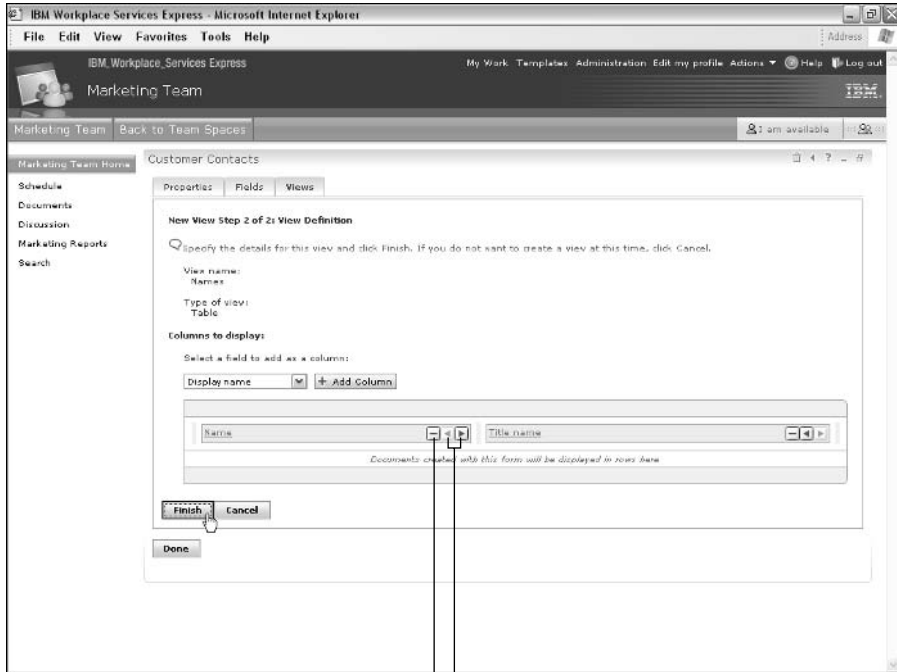
Figure 13-13:
Select the columns a view will display and decide on their order.

Click these buttons to reorder columns.

Click this button to remove a column.

Figure 13-14:
New views are automatically added to a form's Show list.

3. **Click the Views tab.**

4. **To delete the view altogether, click the Trashcan icon next to the view you want to remove.**

5. **To change the order in which the form lists the views, click the up or down button next to the views to rearrange them.**

6. **To change the columns the view displays, click the name of the view, and then follow the steps in the previous section, "Creating a new view."**

7. **When you are finished changing the view, click the Save and Close button (if you're modifying a template's view), or click the Done button (if you're modifying a form's view).**

Working with Chart views

Charts are just a fancy kind of view that you can use to graphically summarize a collection of documents in a form. For example, Figure 13-15 shows a pie chart representation of the cars owned by a bunch of people.

TIP

When displaying a Chart view, you can see details about a given bar or slice by hovering the mouse cursor over it.

Creating a Chart view is easy; you just select Chart as the view type in the View properties form.

Figure 13-16 shows the view properties form for a Chart view; as you can see in the figure, all you have to do is select the field on which the chart will be based and click either the Bar Chart or Pie Chart radio button to select the type of chart.

Figure 13-15: Chart views summarize a form's contents in either a bar or pie chart.
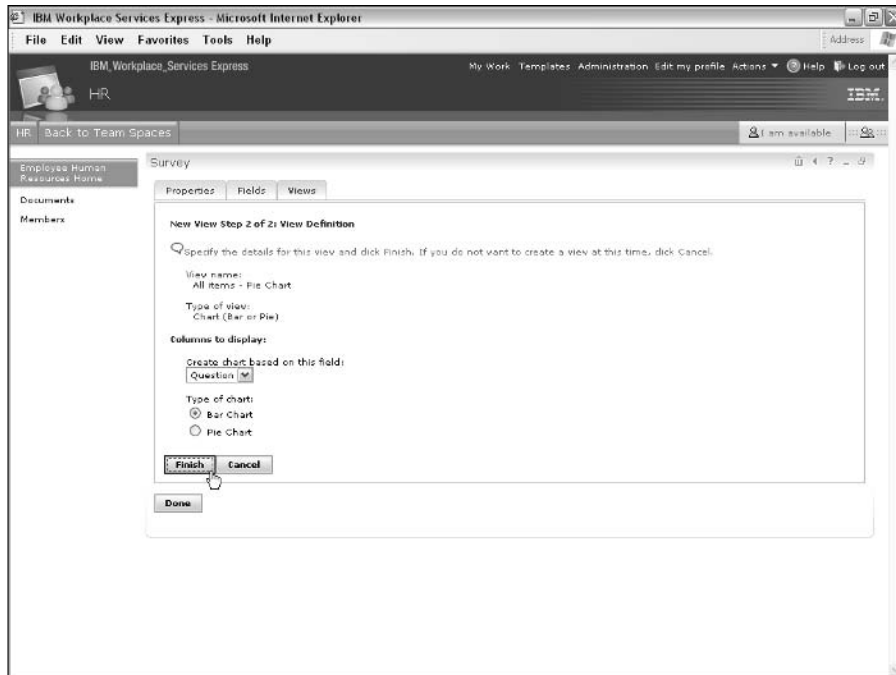
WSE charts are easy to create, and of course they're dynamic; every time you choose a WSE Chart view from a form's Show menu, the chart is updated automatically. If someone on the team has added new documents to the form since the last time you viewed that chart, the chart is updated to reflect the new documents the next time you view it.

That said, WSE charts are pretty simple; there aren't any formatting options, and you can only plot one bar per series in a bar chart.

Using WSE's Built-in Form Templates

Table 13-1 lists the form templates that are included with WSE. The first column is the name of the form template; the second column describes it; and columns three and four list the fields that the form includes, and the template's views, respectively.

TIP

Use this table as a handy-dandy reference if you are considering which form to add to a team space, if you need to modify the fields that a form uses, or if you're going to create a new form template of your own and are wondering which of the built-in forms you should use as a starting point.

Table 13-1	Form Template Options		
Form Template	*Description*	*Fields*	*Views*
Agenda	Plan and post meeting agendas	Name, Owner, Duration, Description, Attachments, Author, Created, Last Modified	All items
Announcements	Broadcast news or event information	Name, Description, Author, Created, Last Modified	All items
Attendance	Track meeting or event participation	Who, Attending	All items
Custom (Blank form)	Provided as a starting point for any custom form	Name	All items
Customer Contacts	Track customer information	Last Name, First Name, Middle Name, Title, Display Name, Work E-mail, Personal E-mail, Work Phone, Mobile Phone, Home Phone, Fax, Company, Address, Sales Representative, Products Purchased, Notes, Author, Created, Last Modified	All items
Directions	Provide directions for events and facilities	Destination, Directions, Link, Attachments	All items
Employee directory	Manage contact information for employees	Last Name, First Name, Middle Name, Title, Display Dame, Work E-mail, Personal E-mail, Work Phone, Mobile Phone, Home Phone, Fax, Address, Department, Hire Date, Notes, Author, Created, Last Modified	All items

Form Template	Description	Fields	Views
FAQs	Post answers to frequently asked questions	Question, Answer, Attachments	All items
Invitations & RSVP	Track invitation responses	Who, Invitation, Sent, Response, Created, Last modified	All items
Issues	Track and prioritize issues	Name, Owner, Status, Priority, Description, Attachments, Author, Created, Last Modified	All items, Open items, Closed items
Links	Use for providing links to related sites	URL	All items
Milestones	Track project milestones	Name, Date, Description, Author, Created, Last Modified	All items
Minutes	Post meeting minutes	Minutes, Author, Created, Last Modified	All items
Prospects	Track prospective customers	Last Name, First Name, Title, Display Name, Work E-mail, Personal E-mail, Work Phone, Mobile Phone, Home Phone, Fax, Company, Address, Sales Representative, Products, Notes, Author, Created, Last Modified	All items
Sales Tracking	Set sales targets and track progress	Sales Associate, Target, Actual, Notes, Created, Last Modified	All items
Sign Up Sheet	Plan for event attendance	Item, Who, Description	All items
Survey	Poll members	Question, Response	All items
Vacations	Track when people will be out of the office	Who, Starting, Returning, Author, Created, Last Modified	All items

Working with Other Kinds of Portlets

WSE's built-in form templates are, in fact, portlets. Because they're built in and so easy to use, they're the portlets you'll use more often than any other.

You may have occasion to use other kinds of portlets, however. WSE includes some sample portlets, of course, like the My Weather portlet that's probably right in the middle of your home page. But if you know how to build your own, or if you download portlets from the IBM Workplace Solutions catalog, you can use the portlets to your heart's content.

It's hard to offer much guidance on how to use a particular portlet, because the workings of any given portlet are up to the person who creates it. If you download one of the thousand or so portlets that are available from the IBM Workplace Solutions catalog, for example, it will probably come with its own instructions.

However, there are two things you need to do to be able to use a portlet in WSE. You must know how to install a portlet, and you must make sure it shows up in the Portlet Palette.

Adding a new portlet to WSE

Use these steps to add a portlet to WSE:

1. **Click the <u>Administration</u> link in the toolbar.**

2. **Click Portlets in the Navigation bar.**

   The Portlet Management page is displayed.

3. **Click Install.**

   The Install Portlets form is displayed.

4. **Enter the filename and path for the new portlet, or use the Browse button to locate the portlet file on your hard drive.**

5. **Click the Next button, and then click the Install button.**

   WSE tells you whether the new portlet has been successfully installed.

You have to install a portlet to be able to use it in WSE.

Adding portlets to the Portlet Palette

That oh-so-cool Portlet Palette that you use to drag and drop portlets doesn't necessarily list all of the portlets that are available. Particularly if you have installed a new portlet as described in the previous section, you need to follow an extra step or two before you can drag and drop the portlet onto a page.

Use these steps whenever you need to add a portlet to what's listed in the Portlet Palette:

1. **Open the Portlet Palette.**

   The Portlet Palette slides out.

2. **Scroll to the bottom of the list and click the <u>Add</u> link.**

3. **If you know the portlet's title, enter it in the Search For field.**

   Alternatively, click the plus sign next to the Search On field, and then select Title Contains, Description Contains, Keyword Contains, Last Modified, or Unique Name. Enter the appropriate search term in the Search For field.

   Choose All Available to see every single portlet WSE has installed.

4. **Click the Search button.**

   WSE displays all of the portlets that are installed and match what you entered in the Search For field.

5. **Click the selection box next to the portlet you want to add to the Portlet Palette and click OK.**

   The Portlet Palette now includes your portlet in the list, for your dragging and dropping pleasure.

Removing portlets from the Portlet Palette

Over time, your Portlet Palette list can become cluttered with portlets you don't use that often. Use the following (somewhat awkward) steps to remove a portlet from the Portlet Palette:

1. **Open the Portlet Palette.**

   The Portlet Palette slides out.

2. **Click the Edit icon at the top of the Portlet Palette's list (it looks like a pencil).**

3. **Click the <u>Portlets Category</u> link.**

   The list of the portlets that your Portlet Palette is using is displayed.

4. **Select the portlets you want to remove from the list by clicking the selection box next to them.**

5. **Click the Remove button and then click OK.**

   WSE shows the Portlet Palette, which no longer contains the portlet(s) you removed.

REMEMBER

Removing a portlet form the Portlet Palette isn't really deleting it or uninstalling it; you're just removing it from what you see when the Portlet Palette comes a slidin' out.

Adding categories from the Portlet Palette

In the interest of leaving no stone uncovered, consider the scenario where you have tons and tons of portlets. Can you imagine how cumbersome the Portlet Palette would be in such circumstances, and how much time you'd waste scrolling through that long list of portlets?

Fortunately, when presented with such unlikely circumstances, you can categorize the portlets that are listed in the Portlet Palette. Doing so has two effects:

✔ The Portlet Palette is *slightly* easier to use.

✔ You will look like a complete WSE hotshot the next time you need to show off to your friends.

Use the following steps to add a portlet from the Portlet Palette:

1. **Open the Portlet Palette.**

   The Portlet Palette slides out.

2. **Click the Edit icon at the top of the Portlet Palette's list.**

3. **Click the New button.**

4. **Enter the New category in the Category Name field.**

5. **Click the Add button.**

6. **Use the Search button to find the portlets that you want to be in your new category.**

7. **Click the Selection box next to the name of each portlet you want to put in the new category.**

8. **Enter the name of the new category of portlets in the Category Name field.**

9. **Click the Done button two times.**

   WSE shows the Portlet Palette, which now contains the new portlet category.

Figure 13-17 shows a Portlet Palette with two categories, and also proves that the author of this book is, in fact, a complete WSE hotshot.
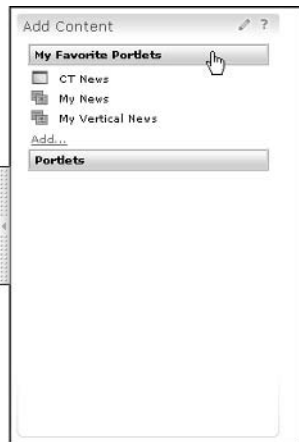
Figure 13-17: The Portlet Palette can organize portlets into categories.

Chapter 14

Creating Team Spaces and Team Space Templates

*I*t's easy to create a new team space, because you never have to start from scratch. With IBM Workplace Services Express team space templates, you can jump-start a new team space or project by loading the new team space up with the pages, portlets, and roles that you need.

Chapter 14 tells you how to create a new team space, modify an existing one, manage who can (and can't) use the team space and its tools, and how to make your own team space templates.

Getting Your New Team Space Started

In the big picture, there are three steps to bringing a new team space to life:

1. **Choose a template and create the team space.**

   A brand-new team space is just a few clicks away, but you have to choose a template first.

2. **Add members.**

   Just about the first thing you do after establishing the new team space is invite people to start using it.

3. **Customize it.**

   WSE's team space templates aren't mind readers, so chances are that your new team space isn't 100 percent *exactly* what you and your team need, even though it *will be* pretty close. You'll probably want to add some pages of your own, rearrange or select different portlets, and so on.

TIP

Depending on how much customization your team space needs, you may want to complete your team space's customizations before declaring the team space open for business. So go ahead and swap Step 3 for Step 2 if you want to.

Knowing your template options

Making a new team space is easy; the only part you really have to think about is the template on which the team space will be based. WSE includes about a dozen templates to choose from, not including any templates you create on your own (see "Creating a new template," later in this chapter).

Templates are the genesis of every team space, and are like a tear sheet for your new team space; the basic premise is that rather than starting a new team space from scratch, it's easier to start with a team space that already has pages, forms, portlets, and roles built in.

Here's a list of the team space templates you can use (in addition to any you might have created yourself). These are the templates that are included with WSE:

- ✔ **Employee Human Resources Site:** Designed to help you share human resources information with an entire organization. Its home page includes Announcements, FAQs, and Links, and a Human Resources Site that also includes a document library and members page.

- ✔ **Customer Support Team:** Useful for any group that supports another. Its home page uses the following portlets: Announcements, Issues, Members, Links, and FAQs. This template also provides a Schedule page that uses the Team Calendar and Vacations portlets. Customer support team spaces also include pages for a document library, chat room, discussion, and search pages.

- ✔ **Chat Room:** A place for the team to have live chats (we discuss using chat rooms in Chapter 9). The Chat Room template includes tools for archiving your team's pearls of wisdom.

- ✔ **Discussion:** Threaded discussion forums for teams, as discussed in Chapter 10.

- ✔ **Sales Team:** Useful for a team of sellers. Its home page uses the Announcements and Members portlets. This template provides a Schedule page with the Team Calendar, Team Tasks, Milestones, and Vacations portlets. Its Sales page uses the Customer Contacts,

Prospects, and Sales Tracking portlets, and this template also includes a document library, discussion forum, and search page.

✔ **Human Resources Team:** A simple template with just two pages. It includes a page for a chat room and a page for the team space's members list.

✔ **Event Planning:** Helps you plan an event, such as a team meeting, party, customer visit, executive briefing, and so on. Its home page uses the Team Tasks, Directions, Sign up Sheet, and Invitations portlets. The template also provides a discussion page, chat room, search page, and a page for managing members.

✔ **Marketing Team:** A lot like the Sales Team template, except that it does not include a Sales page. The Marketing Team template provides a home page with the Announcements, Members, and Links portlets. Its Schedule page uses the Team Calendar, Team Tasks, Milestones, and Vacations portlets. The template also includes a document library, discussion forum, and search page.

✔ **Meeting Materials:** Designed to help you run an individual meeting. Its home page uses the Agenda, Minutes, Team Tasks, and Attendance portlets. It also includes a chat room, document library, a members page, and search pages.

> The Meeting Materials template is found in the Applications (not Team Spaces) page.

✔ **Team Project:** Useful for running simple projects. The template provides a home page that uses the Announcements and Members lists. It also provides a Team Calendar page with the Team Calendar and Team Tasks portlets, and a document library, chat room, discussion forum, and search page.

✔ **Team Project**, **Extended:** Useful for managing and running larger or more complex projects than the "plain" team project template. Its home page includes the Announcements and Members portlets. Its Team Calendar page uses the Team Calendar, Team Tasks, Milestones, and Vacations portlets. The template also provides a document library, discussion area, chat room, and search page.

Building a team space from a template

Use the following steps to create a new team space:

1. **Click the Navigator's Team Spaces button.**

   The Team Spaces Catalog is displayed.

2. **Click the New button.**

   The New Team Space form appears, as shown in Figure 14-1.
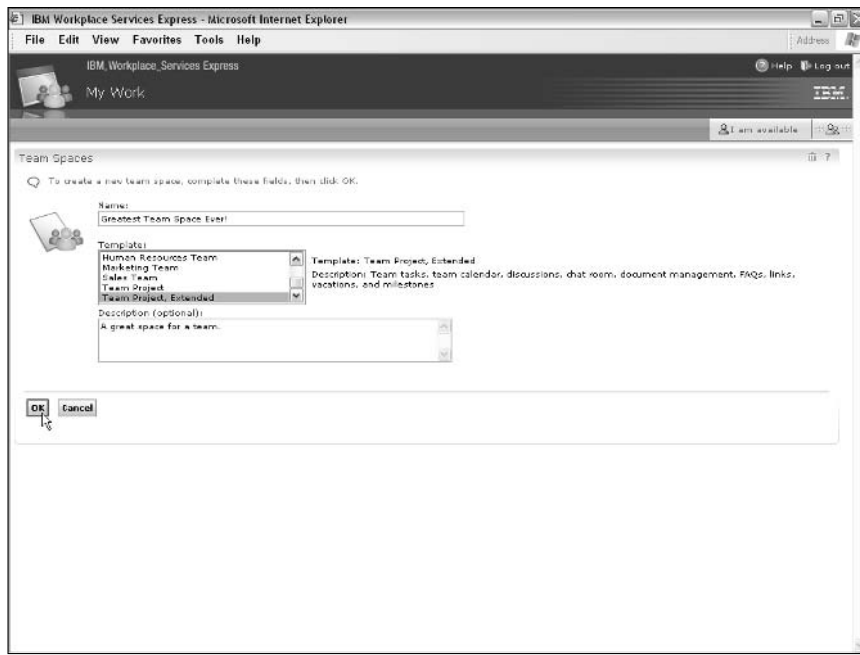
3. Enter the name for the new team space in the Name field.

Team space names can't include a back slash (\), asterisk (*), question mark (?), angle brackets (<>), or vertical bar (|).

4. Select the template on which the new team space will be based from the Template list.

5. Enter a description in the Description field.

Although it's optional, including at least a few words about what the new team space is intended to do is a good idea. What you type in the Description field appears at the top of the new team space's home page, so the description should be short, sweet, and professional.

6. Click the OK button.

The Set Component Properties form appears.

The fields that appear on the Set Component Properties form vary depending on the template you choose in Step 4. Most templates ask you whether you want to use New Member Notification tools. The Set Component Properties form may also include questions about how many team tasks should be listed at a time.

7. Click OK to create the team space.

WSE creates the new team space (it might take a minute or so for this step to finish), adds the new team space to the team space catalog, and tells you when it's finished, as you can see in Figure 14-2.

Who's the boss?

Running a team space is easy; in fact, you may find that you don't have to do that much.

Most of your activity occurs when the team space is new, or at least new to you. When you're the new manager of a particular team space — either because you just created it, or because you inherited it from someone else — you'll find yourself spending the most time involved with its day-to-day care and feeding.

For example, if you use the steps in the section "Building a team space from a template," earlier in this chapter, to create a new team space, you probably have some ideas about how to customize the team space to meet your project's needs; perhaps you need slightly different forms than the template provided, or you may even want new pages to organize the team and its deliverables. When you create a new team space, you also need to think about its membership and decide who can access the team space and use its pages and tools. In some team spaces, you may even want to divvy up access so that some people have access to *this* part of the team space and other people on the team have access to *that* part of the team space. In other words, when you create a new team space, you may need to spend some time thinking through and implementing roles and access levels.

But after a while, the design and access decisions you have to make (and the time you have to spend implementing them) tend to diminish.

When you're past the setting up stage, the most common thing you do as a team space manager is deal with membership. As people leave the team and project, or join it, it's your job as the team space manager to give or deny people access to various areas, documents, and tools.
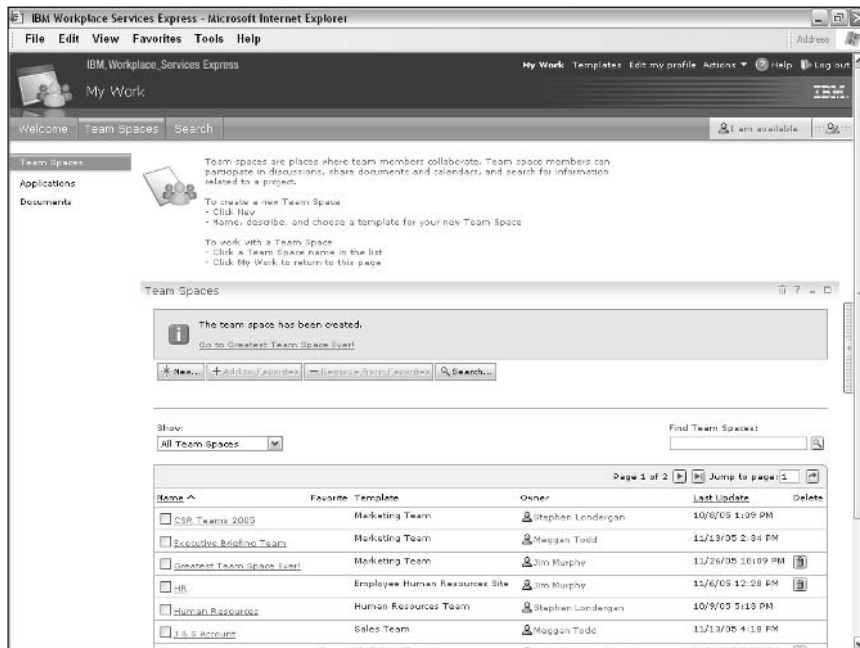
Figure 14-2:
WSE tells you when it has finished creating your new team space.

Adding and managing members

Every team space has a Members portlet that's used to manage the list of people who can (or can't) use the team space. A Members list appears on each team space, as well. Where you find the Members portlet depends on the team space and/or the template that was used to create the team space. Very often the Members portlet is front and center, on the team space's home page, but some team spaces have a special page just for the Members portlet.

When you create a new team space, as you can see in Figure 14-3, the Members list and Members portlet are pretty small. When you create a brand-new team space, you're the only person listed.

When you peek behind the curtain of any team space, you find that every part of the team space has a *role* assigned to it. Roles determine who has access to various parts of the team space. In Figure 14-3, for example, there are two roles: Moderators and Contributors. (I introduce the Moderator and Contributor roles in Chapter 4.)

Every area in WSE (including forms, portlets, pages, document libraries, and more) has a role associated with it. The roles tell individuals, "You can only see and use *this* part of WSE if you have *that* role."

Figure 14-3: A new team space's Members list starts out empty, except for your name.
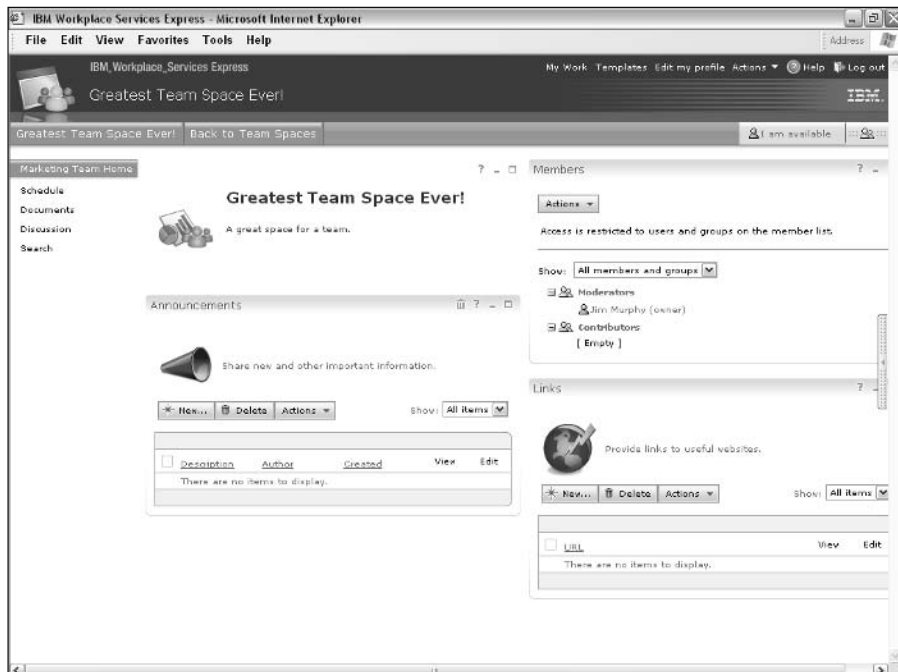
Consider the typical Sales Team template. It has *at least* 16 distinct components. The team space has six pages and a dozen or so portlets scattered around. In each of those 16 components, you can customize the roles to slice and dice exactly which members of the team have access to any one of those 16 components.

For example, the Sales Team template comes with the two roles (Moderators and Contributors) shown in Figure 14-3. The template comes ready-made to include the Contributors role on each of the 16 components.

What does that mean to you? It means you don't have to go around defining and assigning roles for every last page, portlet, and form in a new team space. The roles are predefined, so in the vast majority of team spaces, your only job is to determine which members are associated with the preset roles.

Understanding role rules

Roles are WSE's way of fine-tuning who has access (and what kind of access) to a team space.

Many team spaces, like the one shown in Figure 14-3, have just two roles:

- *Contributors* can contribute to the team space by adding and editing documents to any of the portlets on any of the pages.
- *Moderators* can contribute to the team space, edit the team space (add a new page, for example), and manage the Members list.

  A person's role varies from one team space to another, and the rights associated with a role might be different, too. For example, two different team spaces might define the specific rights associated with the Moderators role differently.

Understanding the benefits of customized roles

You can define your own roles in a team space. You might create a role to limit access to a certain part of a team space, for example, or to distinguish between who can read documents and who can edit them.

Creating a customized role requires you to follow two basic steps:

1. **Create the new role.**

   This step may involve associating the role with a specific page of the team space.

2. **Define which of the team space's members are given the new role.**

For example, say you create a 2006 Sales team space, based on the Sales Team template. The team space is a team hub for 101 people — 90 sales people, and 11 sales managers.

The team space has six pages that it inherited from the template: a home page, plus the Schedule, Sales, Documents, Discussion, and Search pages. Of course, you can add more pages. For the sake of this example, say you add a seventh page called *Commission Statements.* (I show you how to add a page in "Creating a new page," later in this chapter.) This page is intended to be the part of the team space that those 11 sales managers use to determine who is getting paid what. For the sake of the argument, you want to make the Commission Statements page available to just the 11 sales managers.

In this example, the 2006 Sales team space needs four roles:

- **Moderator:** Someone, probably *you,* has to manage the team space's components and members.
- **Contributor:** This is the rank-and-file role for the 90 sales people who will have access to the first six pages of the team space.
- **Sales Manager:** This is the custom role you have to create, assign members to, and associate with the Commission Statements page.
- **Everyone else:** Although you don't define this role explicitly, most team space membership is limited to a certain group of people. Anyone who has *not* been assigned the role of moderator, contributor, or sales manager can't access the team space at all.

It's good to understand how roles work, but don't get put off. In many team spaces, the two or three roles that come from the team space's template are sufficient. In those cases, you don't have to create any roles at all; you just have to manage who has which role.

Defining roles in a team space

Use the following steps to create and manage roles in a team space:

1. **Open the team space in question.**

2. **Choose Actions⇨Edit.**

   The team space's Properties page appears.

3. **Click the Roles button, which appears on the left side of the screen.**

   The roles that are already defined in the team space are listed on the Roles page.

4. To modify what rights are associated with a particular role, click the name of the role in the Roles list; or to create a new role altogether, click the New button.

The Role properties page is displayed.

Figure 14-4 shows a sample role being defined; needless to say, the exact contents of WSE roles are determined by the contents (pages and portlets) of the team space in question.

5. Click the OK button and then click Done when you are finished creating or editing a role.

Keep reading this section for more information about the options you can set.

> **TIP**
>
> When you create a new role, you can have it inherit settings from an existing role, or you can define the role's settings from scratch.

Figure 14-4:
Defining a team space's role.

As you can see in the figure, each role has a name, which appears in the team space's Members portlet. Make a note of the two check boxes at the top of Figure 14-4:

- ✔ **Members of This Role Can Edit the Application:** Clicking this check box means that members of this role can edit the page or pages in the team space for which this role has been set up.

- ✔ **Members of This Role Can Manage Members:** Clicking this check box means that members of this role can add and delete members for the page or pages in the team space for which this role has been set up.

  If the role is set up for just one page of the team space, individuals given editorial and management rights can only make changes to the page in question. Clicking both check boxes essentially grants all members of the role the Moderator rights that you, as manager of the team space, have — at least for the page in question.

The most important part of the Roles form is in the middle, where WSE displays each page and portlet in the team space, along with a drop-down list that you use to select what level of access, if any, the role will have. For example, for a document library, you can define a certain role as Reader (these members can read documents, but nothing more), Editor (these members can read, create, edit, and delete their own documents), or Manager (these members can manage the document library, editing and deleting any of its contents).

If you want to hide an element or page of the team space from members of a role, select the item (like the Commission Statements page) and select the No Access option from the drop-down menu.

Using the Members portlet

Use the Members portlet to determine who has access to a given team space, and what role individuals have. Although every team space has a Members portlet, you need the Moderator role in order to use it.

When you create a new team space, you are automatically set up as the team space owner, and automatically assigned the Moderator role, so you can manage its members.

Figure 14-5 shows an example Members portlet; as you can see, the portlet shows the names of the roles that have been defined in the team space. Click the plus (+) and minus (–) signs next to a role's name to see its members.

Use the Members portlet's Show drop-down list to change which members are displayed; you can select All Members and Groups, All Members, or Online Members Only.

Figure 14-5:
An example team space's Members list.
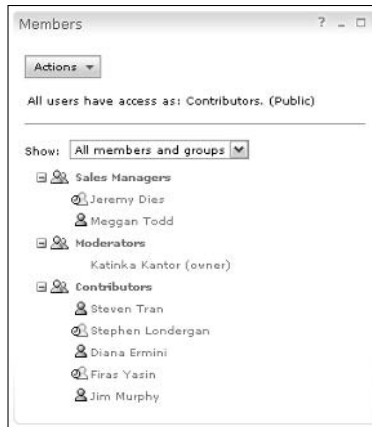
Actions ▼

If you have Moderator access to a team space, you can use the Actions button in the Members portlet to manage the team space's members. The Actions button has five options:

- ✔ **Add Members:** Use this option to give people access to the team space.

- ✔ **Manage Members:** Change the role assigned to a particular person or group of people, or revoke access altogether.

- ✔ **Change Owner:** If you're the owner, you can make someone else the owner.

- ✔ **Cancel My Membership:** Any member of a team space (except its owner) can voluntarily resign from a team space.

- ✔ **Give All Members Access as Contributors:** Choose this option to let anyone who has a username and password for your WSE server access the team space.

Using the Members portlet to add members to a team space

Use the following steps to make a person (or group of people) a member of a team space:

1. **Open the page in the team space that has the Members portlet.**

   When in doubt, look on the team space's home page.

2. **In the Members portlet, choose Actions⇨Add Members.**

   The Directory Search: Find People dialog box is displayed.

3. **Enter the name of the person or group in the Search For field and click the Search button.**

   You can use the asterisk (*) wildcard in the Search For field.

   The list of matching people and group names is displayed in the Search results list.

4. **Select the person, people, or groups to whom you want to grant access; click Add.**

   The names you selected are displayed in the Selected Names list.

5. **Click OK.**

   WSE tells you that the people you have selected have been added to the Members list. These people can now use the team space, will see the team space listed when they visit the Team Spaces Catalog, can search the team space's contents, and so on.

REMEMBER

When you add a person or group to a team space's Members list, the person is assigned to whichever is the last role in your Members list. Use the steps outlined in the next section, "Using the Members portlet to manage members," to change the role.

Using the Members portlet to manage members

When you choose Actions⇨Manage Members, WSE displays the Manage Members page, as shown in Figure 14-6.

Click here to assign group roles.

Figure 14-6: Use the Manage Members page to change or revoke a member's access.

Use the following steps to change a person's role:

1. **Click the name of the role that contains the member whose role you want to change.**

   The list of the role's members is displayed.

2. **Select the person whose role you want to change by clicking the selection box next to their name.**

   You can select more than one person.

3. **To revoke access for those you've selected, click the Remove button.**

4. **To change the role the person has, click the Reassign button. Select the person's new role from the Reassign Members To drop-down list.**

   TIP

   As you can see in Figure 14-6, the Members page has tabs for setting member access and group access. Because a group's members are defined in your organization's directory, using groups is often preferable, especially if the team space has a lot of members. The steps for adding groups to a team space's Members list are the same as those for adding individuals, except that you click the Group Access tab.

5. **Click the <u>Close Manage Members</u> link when you are finished reassigning roles.**

Customizing a Team Space

As the moderator of a team space, you can change the team space — for example, you might need to change the team space's name, or (more likely) add new pages and customize existing pages.

Editing team space properties

When you choose Actions⇨Edit, the team space Properties page is displayed.

Figure 14-7 shows the Edit Application Properties Of form. You can change the following:

✔ **Application Name:** Enter the new name in the Application Name field to change the name of the team space; what you enter in this field determines how the team space is identified in the Team Spaces Catalog, and what is displayed at the top of the team space's home page.
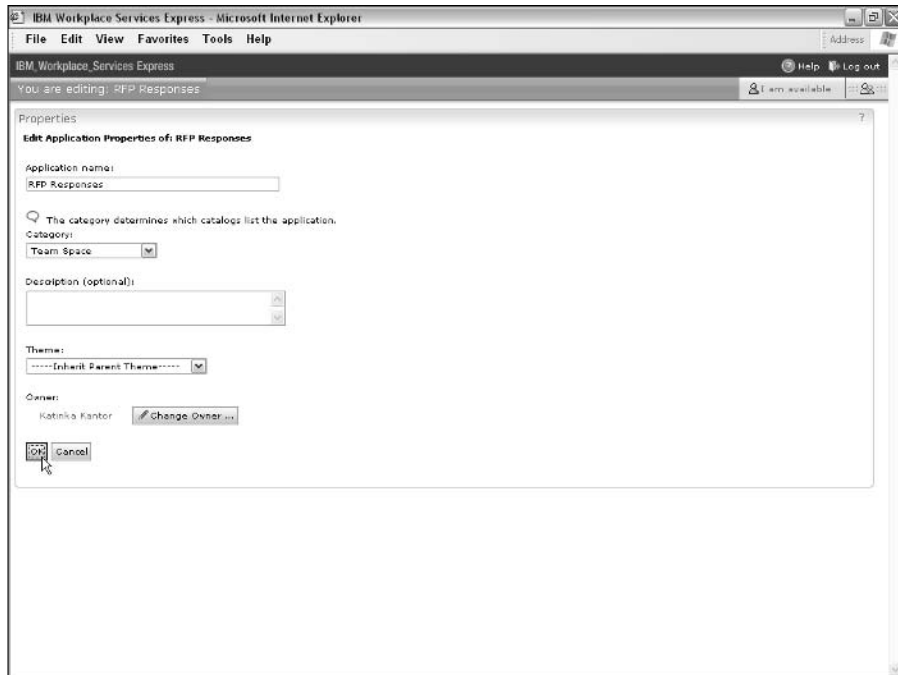
Figure 14-7:
Changing
a team
space's
properties.

- ✓ **Category:** If you make changes to the Category field, the team space is no longer listed in the Team Spaces Catalog, and instead appears among either your document libraries or applications.

- ✓ **Description:** Change what's in the Description field. This text is also displayed at the top of the team space's home page.

- ✓ **Theme:** This drop-down list enables you to change the look and layout of the team space. In the unlikely (and rather unadvisable) event that you want a team space to look different than the rest of WSE, select a different theme from the drop-down list.

Click the OK button when you are finished editing a team space's properties.

Editing a team space's component settings

Some team spaces include optional components that extend the team space's operation. Click the Component tab on the team space Properties page.

Figure 14-8 shows a sample Components form; the configurable settings that appear on the Components form vary from one team space to the next. The team space shown in the figure uses the Team Tasks portlet, for example, so clicking the Edit button enables you to change how many tasks are displayed at a time, and in which order.

Managing a team space's pages and layout

A common reason to edit a team space's properties is to work with its pages. For example, you might want to add a new page, or change the portlets that are on an existing page. You can even delete a page (and all its contents) completely.

When you choose Actions⇨Edit, the team space Properties page is displayed; click Pages and Layout to work with the Pages and Layout form, as shown in Figure 14-9.

Figure 14-8: Changing a team space's component properties.

Reorganize up or down.
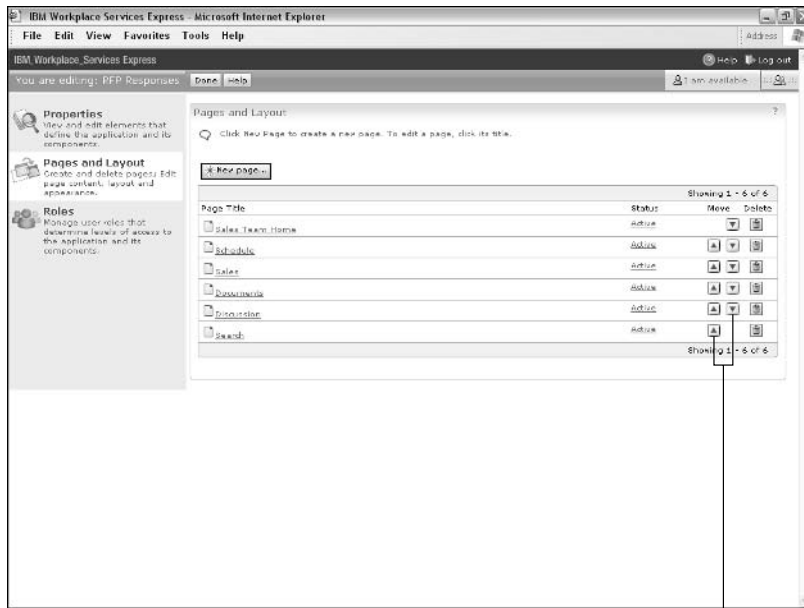
Figure 14-9:
Managing
a team
space's
pages.

As you can see in the figure, the Pages and Layout form shows all the pages that make up the team space. Use the up and down arrow buttons (shown on the right side of Figure 14-9) to change the order in which the pages are presented, and use the Delete button (cautiously) to delete a page altogether.

If you want to make a page temporarily inaccessible, use the Status column to indicate whether it is active or inactive. Inactive pages are saved as part of a team space's design, but are not accessible or usable by anyone on the team. Click the link in the Status column to toggle the page's status between Active and Inactive.

TIP

You may be wondering why you would want to make a page inactive. Well, deleting a page removes the page, the portlets on the page, and (most important) whatever information has been entered in those portlets — forever. By making a page inactive instead of deleting it permanently, the page isn't accessible to anyone on the team, but *you* still have access to it, just in case you find later that you need it again.

Creating a new page

To create a brand-new page in a team space, click the New Page button and use the form shown in Figure 14-10 to define its properties and layout. The name you enter in the Title field determines how the page is listed in the team space's navigators and menus.
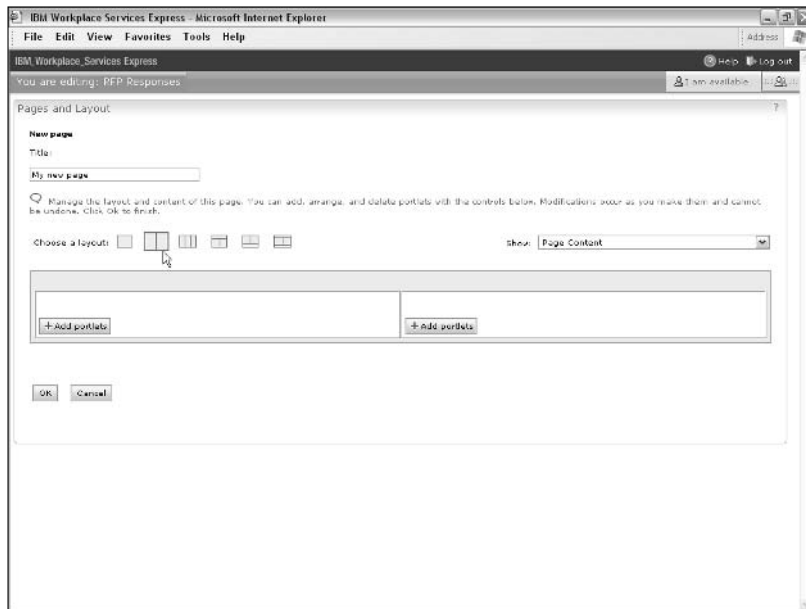
Figure 14-10:
Managing
a team
space's
pages.

A page can have one of six layouts, which you select from the Choose a Layout field. The layout you select serves as a foundation of sorts for the page, and determines where and how portlets can be added to the page.

After you select the page's layout, you can (optionally) use the Add Portlets button that is displayed in each frame of the page to determine which, if any, portlets appear in that frame.

When you click the Add Portlets button in a frame, you then use the Add Portlets to Page form to select the portlet that you want to include in that frame on that page. (You, or someone else on the team, could instead open the team space and use the Portlet Palette to drag and drop portlets on the page.)

One advantage of adding portlets by editing the page (as opposed to dragging and dropping them from the Portlet Palette) becomes obvious when you choose Show⇨Page Content with Portlet Appearance and Locks.

You can change the theme of the portlet, in the unlikely and thoroughly unadvisable event that you want it to look different than the rest. It's far more likely that you will click the portlet's Lock button, as shown in Figure 14-11, in order to prevent anyone on the team from deleting the portlet from the page. In other words, when people view the page in the team space, the portlet in question doesn't display the little trash can icon.

If you select a multiframe page layout, you can also click the up, down, left, and right arrow buttons to rearrange the portlets on the page.

Click Done when you're finished creating a new page.

TIP

When you create a new page in a team space, WSE always puts it at the bottom of your existing pages. Click the up and down arrow buttons if you want your new page to get top billing.
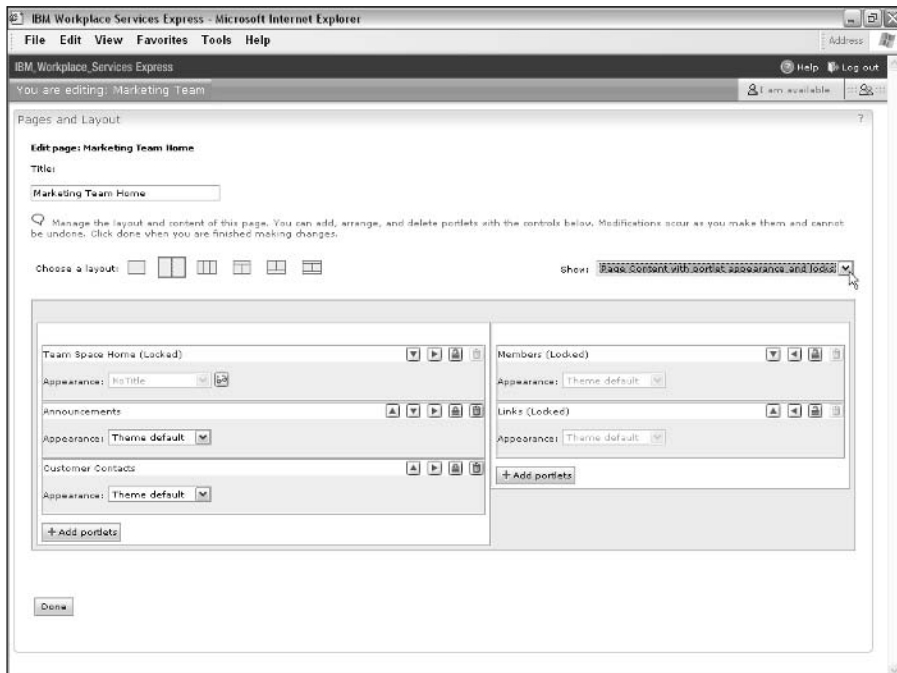
Figure 14-11: Setting a portlet's appearance and lock status.

Editing a page

The steps for editing a page — to change its name, its layout, or the portlets it contains — are the same as those for creating a new page, except that you click the name of the page you want to edit on the Pages and Layout form.

Working with Team Space Templates

With just a few exceptions, the concept behind and steps involved in editing a team space template are the same as those involved in editing individual team space pages. Of course, you edit a template for different reasons, but the way you edit it is the same.

Why would you edit a template? You might create your own. Perhaps you find that every time you create a new team space, you end up adding a new page — such as the Commission Statements page example I discuss earlier in this chapter. Make those changes once to the template so that you don't have to make them each and every time you create a team space based on the template in question.

Managing templates

When you click the Templates link on the toolbar, the Application Template Library is displayed, as shown in Figure 14-12. Use the library to create new templates, and manage and modify existing ones.

The library lists each template's name, owner, category, and modification date; it also provides icons for editing the template:

✔ **Template Roles:** Click this icon to determine the names of the roles that a new team space will inherit from the template, and what, if any, members are assigned to the roles.

✔ **Export:** Creates an XML representation of the template that you can import into the Application Template Library on another WSE server. This is the way you move templates from one WSE server to another.

✔ **Delete:** Deletes a template altogether.

✔ **Unlock:** Because templates can be locked to prevent anyone from changing them, you may sometimes see the Unlock button in the last column instead of the trash can button. Click this button to unlock a template and allow changes to be made to it.
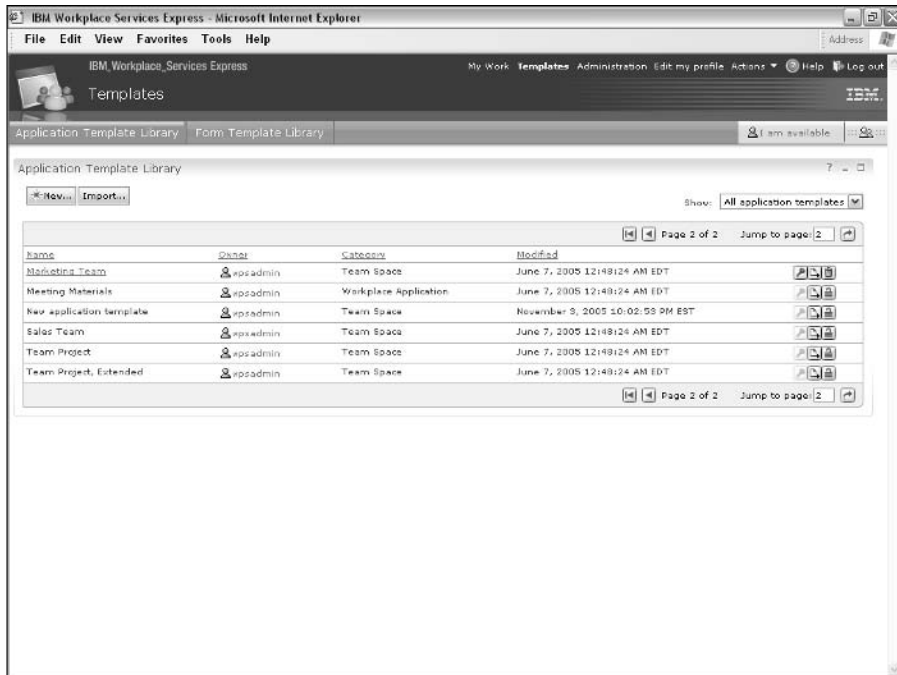
The
Application
Template
Library lists
all of the
team space
templates
that are
available.

Managing a template's roles

When you click the Template Roles button, you use the Template Roles form, shown in Figure 14-13.

Use the Template Roles form to define the roles that you want the template's descendants to have. Optionally, you can determine which people or group names are inherited, too. For example, if you always route submitted drafts to a group called *Expense Approvers,* you could prepopulate that group name in one of the template's roles.

Although you can preload a role with member names, it's more common to define roles generally and leave the assignment of actual people and groups to particular roles to individual team space owners.

If you are the WSE administrator, consider adding your name as a member of the Moderators role on each of the templates; then you will automatically have moderator access to all of the team spaces that are created at your organization — which can be helpful if you have to help a team space owner troubleshoot problems.

Click the Close Template Roles button when you are finished editing template roles.

Figure 14-13:
The roles and members you define in a template will be inherited every time you use the template to create a new team space.

Importing and exporting templates

The import and export facility is used to convert a template back and forth between XML. This is the way you move a team space template from one WSE server to another, and is also an easy way to create a backup of a template.

When you click the Export button, WSE converts the template into an XML document, and prompts you where to save the new XML file.

Creating a new template

Use the following steps to create a new template:

1. **Click the New button.**

   The New Application Template form is displayed.

2. **Enter the name by which the new template will be known in the Application Template Name field.**

3. **Choose Category⇨Team Space.**

4. **Optionally, enter a few words about the template's purpose in the Description field.**

5. **If you want your new template to be based on another template, select the template from the Starting Point drop-down list.**

6. **Click OK.**

   WSE creates the new template, and lists it with all the rest in the Application Template Library.

Editing a template

Edit a template by clicking its name in the Application Template Library. Figure 14-14 illustrates how similar editing a template is to editing a team space; the steps, for example, to add a new page to a template are the same as those described earlier in this chapter in "Customizing a Team Space."

The WSE Template Editor includes a special toolbar of its own, with five buttons:

| Preview | ✔ **Preview:** Temporarily closes the Template Editor so that you can see what a team space based on the template will look like. Click the Done Previewing button when you're, well, done previewing.

| Save and Close | ✔ **Save and Close:** Saves the changes you make to the template and closes the Template Editor.

| Save As | ✔ **Save As:** Saves the template with a new name, which you specify.

| Cancel | ✔ **Cancel:** Abandons the changes you make to the template.

| Help | ✔ **Help:** Although owning a copy of *IBM Workplace Services Express For Dummies* dramatically diminishes your need and desire to click the Help button, there just might be a hint or two in the WSE help system that's worth a look.

Creating a new template from a team space

Although you can always use that aptly named New button to create a new template, there's another way that may be easier and more practical.

The idea here is to take a team space that's in production, and convert it to a template. Because you've already made a bunch of modifications to the team space, converting it to a template (assuming you need it as a template) just saves you the steps of making those same modifications all over again.

Figure 14-14:
Click the
Edit button
to change
the proper-
ties, pages,
roles, and
parameters
of a
template.
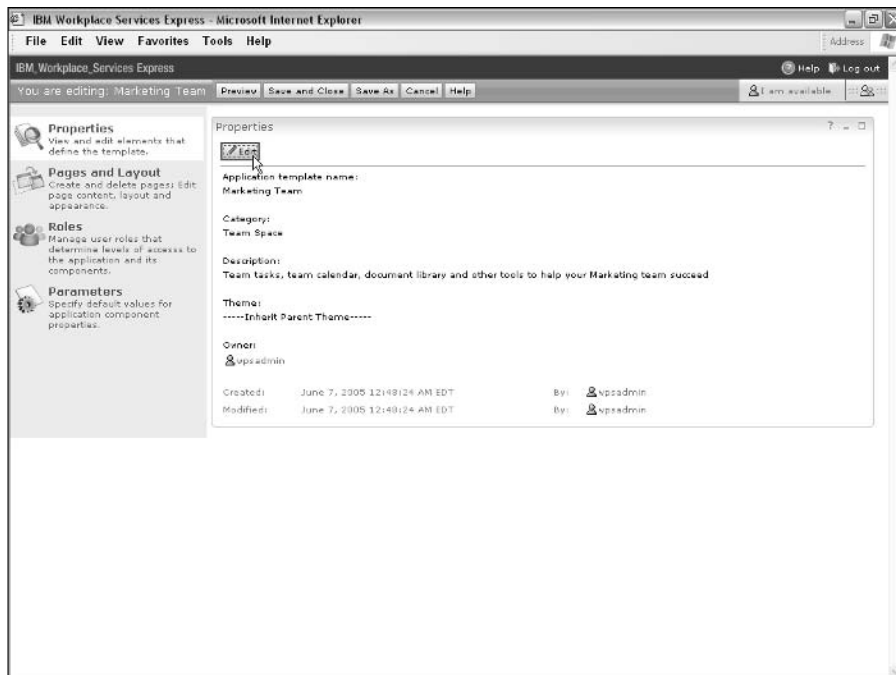
Use the following steps to convert a team space to a template:

1. **Open the team space in question.**

2. **Choose Actions⇨Edit.**

   The team space properties page is displayed.

3. **Click the Save as New Application Template button.**

4. **Enter the name for the new template in the Application Template Name field, and (optionally) add some words describing the template's purpose in the Description field.**

5. **Click OK, and then click Done.**

Unlike some other programs, WSE does not support inheritance between templates and their descendants. Say that on Monday you create a new team space based on the Sales Team template. Then, for the sake of the argument, you add a new page to the Sales Team template, on Tuesday. WSE does *not* have a way for the subsequent changes you make in a template to get pushed into its descendants. In other words, you have to manually add that new page to the team space, too.

Chapter 15

Running WSE

In This Chapter

▶ Managing users, groups, and access

▶ Managing portal content and tasks

▶ Working with administrative settings to fine-tune WSE's look and feel

*I*BM Workplace Services Express is designed to be easy to run and manage, and although WSE and the IBM WebSphere Portal and IBM Workplace platforms on which it is based are *infinitely* configurable, most of the heavy-duty stuff is purposely buried and hidden from you.

Day in and day out, you will spend more time managing individual team spaces, and less time worrying about and managing the system itself; the fact that it's a pretty self-sufficient program is half the reason you're using WSE in the first place.

But there are occasions where you need to administer other parts of WSE. For example, you may need to manage some custom WSE pages, or perhaps you want to change the amount of time that WSE waits before automatically logging out an inactive user.

Chapter 15 lets you get under the hood, introducing you to the important concepts and settings that you need to know about in order to manage WSE.

Putting on Your Administrator Hat

Administratively speaking, the three areas where you'll spend your time are, in order of priority:

1. **Managing users:** People inevitably come and go, need access to this or that team space, get transferred from one project to another, and so on.

2. **Managing applications:** All the things you do to keep a team space or document library up and running — managing the pages, portlets, scheduled tasks, and other parts.

3. **Managing the portal itself:** These are the administrative tasks related to the portal itself, such as taking care of the URL that people use to access their team spaces, tweaking the auto logout time period, setting administrator passwords, and so on.

Considering your entire career with WSE, you'll spend far more time on items Number 1 and Number 2 than you will spend on Number 3.

Managing Users and Groups

How, exactly, you manage users depends very much on how your WSE server and system are set up. More specifically, it's based on how your WSE server is configured to use directory services (the database of usernames, passwords, groups, and so on).

In the simplest WSE installations, WSE uses its own, built-in directory, running on a single WSE server. In this scenario, you use the built-in WSE Administrator to add and edit users, define and edit group members, and so on.

More often, however, WSE is configured to use an external, existing directory, for a couple of reasons:

- ✔ **From a very practical point of view, running directory services on a separate server makes the WSE server perform better.** Offloading directory services to a different server means there is just one less thing for the WSE server to worry about.

- ✔ **Most organizations already have a directory that's set up and functioning to help administer your e-mail system and other applications.** Pointing WSE at an existing directory means that people use the same usernames and passwords in WSE that they use to access other applications.

Although you don't have to use an external directory with WSE, it's usually a good idea, for both performance and practical reasons.

Registering a new user

If you are using WSE's internal directory, or have write access to an external LDAP directory, use the following steps to create a new user:

1. **Log in to WSE with a username and password that has administrative rights.**

   The home page is displayed.

2. **Click the toolbar's <u>Administration</u> link.**

   The WSE Administrator forms are displayed.

3. **Click the Navigator's <u>Access</u> link.**

   The Access page is displayed.

4. **Click Users and Groups.**

   The Manage Users and Groups form is displayed.

Do you LDAP?

WSE works with LDAP (Lightweight Directory Access Protocol) directories. LDAP is a standard, and that means you can use WSE with Microsoft Active Directory, a Lotus Domino Name and Address book, and so on. In the cases where WSE uses a separate and external directory, it may or may not be configured with write access to the LDAP directory; this determines whether or not, for example, you can add new users from the WSE administrative pages, or if you must use some other application (Microsoft Active Directory, or Lotus Domino, for example) to create and manage users and groups.

From a strictly make-this-easy-for-me-to-manage point of view, it's certainly easiest for WSE to have write access to the LDAP directory, but there may be other concerns that make that impractical or even downright unadvisable for your organization. For example, if WSE is being used and managed by a business unit or department in your organization, your IT department probably is (quite understandably) hesitant to let WSE change the organization's directory.

All the issues pertaining to WSE's directory and its relationship with your organization's directory affect the mundane tasks of adding and managing users. Here are the options:

✔ If your WSE server is using an external LDAP directory, you probably won't use WSE to create and manage users and groups — you'll do that in some other application. You will manage roles in WSE, but that's it.

✔ If WSE uses its own internal directory, or if WSE is configured with write access to an external LDAP directory, you can use the WSE administrative forms to manage users.

✔ If WSE is configured to use an external LDAP directory, but does *not* have write access to the directory, you can *not* use WSE to create and manage users; you'll have to do that externally.

The issues and how-to's of designing, managing, and deploying an organization-wide LDAP directory strategy are well beyond the scope of this book, and could easily warrant (and already have, in the case of Microsoft's Active Directory) an entire book of their own — check out *Active Directory For Dummies* by Marcia Loughry, published by Wiley.

5. **Click the Search button.**

   All of the available groups are displayed.

6. **Click the group to which the new user will belong.**

   WSE displays the users who are already members of the group you selected.

7. **Click the New User button.**

   The Provide User Information form is displayed, shown in Figure 15-1. The form contains a dozen fields. The basic information is required; the regional fields are optional:

   - **User ID (required):** The ID that the person will use to log in to WSE, which can be between 3 and 60 characters long.

   - **Password (required):** The accompanying password the person will use to log in to WSE.

   - **Confirm Password (required):** Make sure you entered the password correctly.

   - **First Name and Last Name (required):** Fill in what the user's momma calls him or her.

   - **E-mail (required):** The person's e-mail address.

   - **Preferred Language:** The language in which the portal will be presented to the person.

   - **Preferred Regional Format:** Further customizes the way WSE presents itself, including such minutiae as currency symbols, date formats, and the like.

   - **Time Zone:** Sets the international time zone for the user.

   - **Preferred Calendar Type:** Select Gregorian, Japanese, Taiwanese, Buddhist, or Islamic.

   - **First day of the week:** Determines which day will be listed first in calendars, such as the one presented by the Team Calendar form.

   - **First work day of the week:** Determines which day is considered the first day of the week for appointments and meetings.

8. **Click OK.**

   WSE adds the new person to the directory, and includes the person as a member of the group you selected.
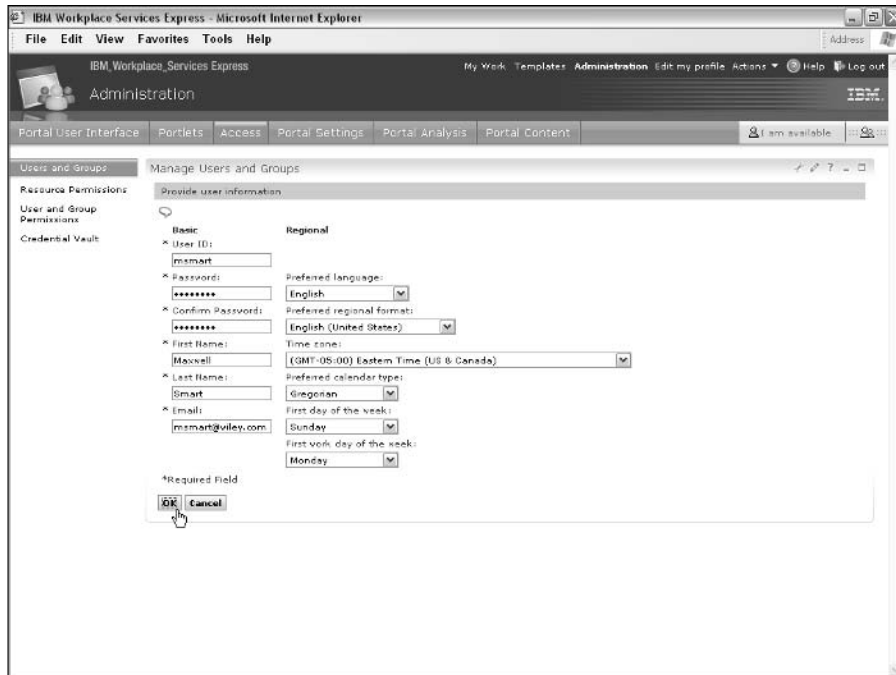
Figure 15-1:
Registering
a new user.

Adding an existing user to an existing group

The steps for adding an existing user are easy, because you don't need to specify a new password and so on for the person. Use these steps to add an existing member to a group:
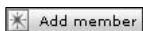
1. **Log in to WSE with a username and password that has administrative rights.**

   The home page is displayed.

2. **Click the toolbar's <u>Administration</u> link.**

   The WSE Administrator forms are displayed.

3. **Click the Navigator's <u>Access</u> link.**

   The Access page is displayed.

4. **Click Users and Groups.**

   The Manage Users and Groups form is displayed.

Excusez-moi, mais parlez-vous WSE?

WSE includes built-in support for 24 languages: Arabic, Brazilian Portuguese, Czech, Danish, Dutch, English, Finnish, French, German, Greek, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Russian, Simplified Chinese, Spanish, Swedish, Traditional Chinese, and Turkish.

When you register a WSE user, the Preferred Language field determines what language appears on-screen. When a user who selects (or for whom you select) English logs in, the portal is presented in the language of London; likewise, *les utilisateurs français verront la français.* WSE is even smart enough to reorient the portal based on the language; for example, when Arabic users log in, the portal is presented in Arabic and is also presented in a right-to-left orientation.

Also, many of the WSE portlets are already multilingual; for example, log in as a French user and the weather portlet might predict *la neige* instead of snow; log in as a German user and the team calendar knows enough to list *Montag, Dienstag, Mittwoch,* and so on (see the figure). German users don't see a New Entry button; they see a *Neuer Eintrag* button.

However, WSE doesn't translate content. In other words, although WSE can translate the name of, say, the built-in Pending Drafts folder or the days of the week in a team calendar, WSE won't translate the name of a folder you created, or the body of a Microsoft Word document you posted.

5. **Click the Search button.**

   All of the available groups are displayed.

6. **Click the group(s) to which the user will be added.**

   WSE displays the users who are already members of the group you selected. You can add the user to more than one group by Shift+clicking or Ctrl+clicking.

7. **Click the Add Member button.**

   The list of WSE users is displayed.

8. **Select the name(s) of the people or person to add by clicking the selection box to the left of each individual's name.**

9. **Click OK.**

   WSE makes the person or people you selected members of the group.

Working with users

As you can see in Figure 15-2, when you search for a user, WSE presents five buttons:

- ✔ **View Membership:** Shows all the groups of which the individual is a member, and lets you revoke membership.

- ✔ **Duplicate Group Assignments:** Makes two people members of the same groups; this is especially useful when adding new members.

- ✔ **Duplicate Role Assignments:** Assigns the same roles to two people; also very useful when adding new members.

- ✔ **Edit:** Edits the user's profile, such as resetting their password, preferred language, and so on.

- ✔ **Delete:** Removes the user — be careful.

Most often, when you add someone to your directory, he or she is joining an existing team or project. WSE makes duplicating role and group assignments easy; select the name of the person whose role or group assignments you want to copy and use the second or third button, shown in Figure 15-2, to copy the settings to a different person.
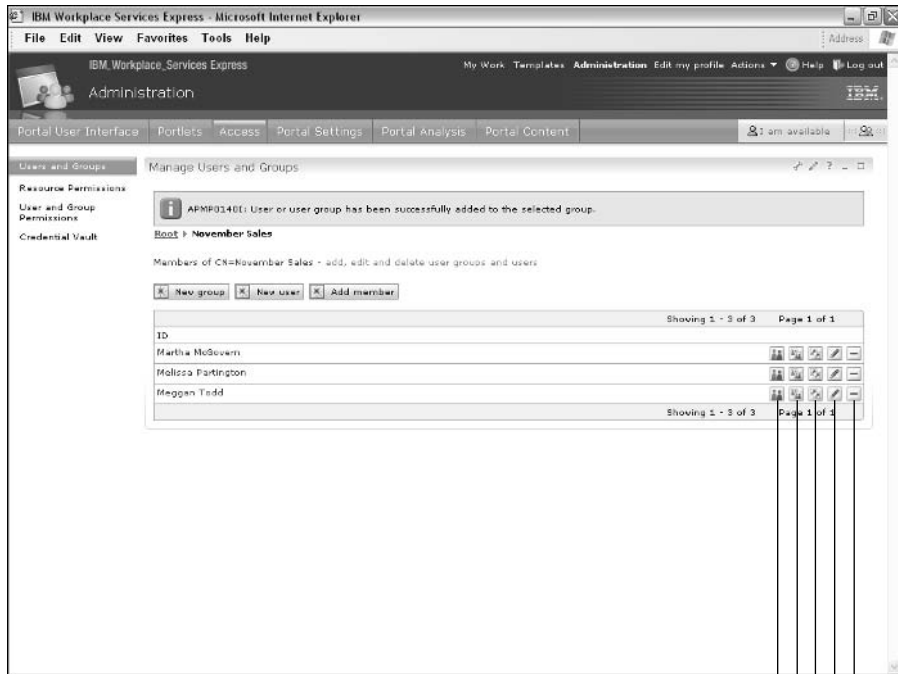
Figure 15-2:
You can
easily
duplicate
group and
role assign-
ments.

View Membership | Delete

Duplicate Group | Edit

Duplicate Role Assignments

Creating a new group

Technically, adding a new group is a one-step process, but in practical terms you really have to do two things. First you create the new group, and then you add members to it. Use these steps to add a new group:

1. **Log in to WSE with a username and password that has administrative rights.**

   The home page is displayed.

2. **Click the toolbar's <u>Administration</u> link.**

   The WSE Administrator forms are displayed.

3. **Click the Navigator's <u>Access</u> link.**

   The Access page is displayed.

4. **Click Users and Groups.**

   The Manage Users and Groups form is displayed.

5. **Click the New Group button.**

   The New Group form — it only has one field — is displayed.

6. **Enter the name for the new group in the ID field, and click OK.**

   After you create a new group, use the steps in the section, earlier in this chapter, called "Adding an existing user to an existing group," to add members to it.

Handling resource permissions

The word *resource* is somewhat loaded. Everything in WSE is considered to be a resource — every page you see, every page you create, every portlet, and so on. Fortunately you don't have to manage the vast majority of WSE resources; you are likely to be worried about only the resources that are relevant to your particular team space or document library. Here are a few areas where you need to edit resource permissions:

✔ You might modify one of the form portlets (see Chapter 13), and subsequently want to set the permissions for the new portlet so that only people with a given role can use it.

✔ You may need to manage your portal pages. For example, if you add a new page to WSE, you can modify the resource permissions settings to determine who has access to it.

✔ If certain users don't use their e-mail inside WSE; you could use the resource permissions settings to determine which role your portal requires to see and use the Mail page.

   You can use resource permissions to set role requirements for any part of WSE — the home page, the Team Spaces Catalog, an individual team space, a page in the team space, and so on.

Figure 15-3 shows the Resource Types page, which appears when you click the <u>Resource Permissions</u> link.

WARNING!
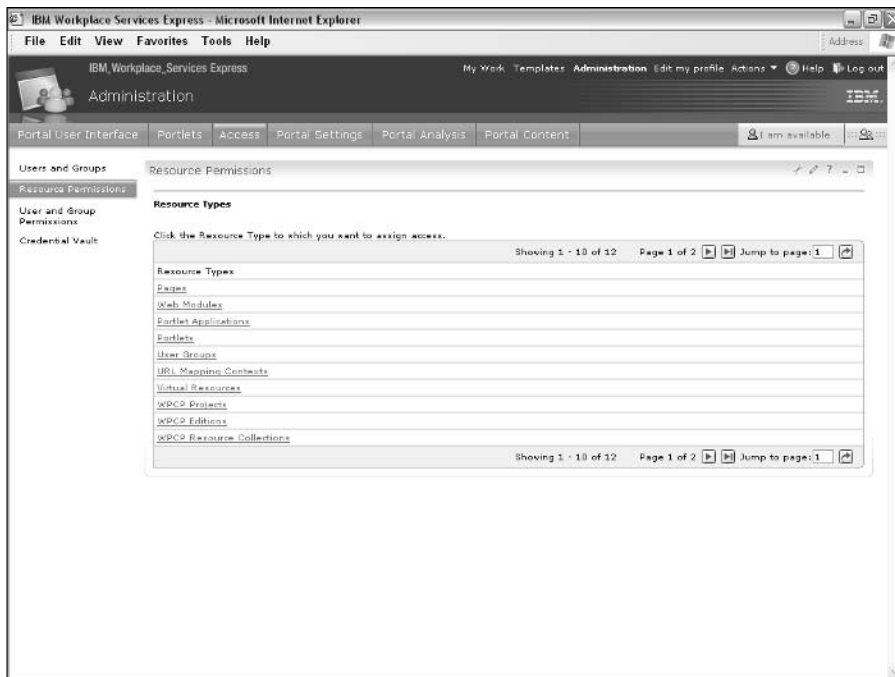
Tread lightly when managing resource permissions. Many of the resources are necessary system components, and setting their access inappropriately can make WSE unusable.

Taking on the hierarchy

The pages in WSE are collected in a hierarchy. For example, consider the To Do page. That To Do page is part of the *Mail* page. The Mail page is itself a member of a collection called *My Portal,* which also includes the Welcome, Team Spaces, and Search pages. Further, My Portal is a member of *Content Root,* which also includes the Administration pages, Page Customizer, and a whole host of other internal pages.

In most cases, the permissions for a given page are inherited, which is to say that a child page

has, by default, the same permission requirements as its parent. For example, the To Do page in the Mail hierarchy is, by default, available to everyone who has access to the Mail page. And by default, the Mail page is available to everyone who has access to My Portal.

If you wanted to limit the access to the entire Mail hierarchy, you can do one-stop shopping by simply modifying the resource permissions for the Mail page.

Setting permission for a page

Figure 15-4 shows what it looks like when you edit the resource permissions for the Mail page. To set the permissions for a given page, you first navigate to the page in question, by clicking the <u>Pages</u> link on the Resource Types page, and then clicking as many links as it takes to dig through the hierarchy to get to the page you want to change.

As you can see in the figure, the Mail page contains, by default, four pages of its own: Mail, Calendar, Address Book, and To Do.

When you click the Assign Access button, WSE displays the Assign Access form, as shown in Figure 15-5. Use the check boxes to determine whether or not a given role is required to use the page you selected, and use the Edit Role buttons to determine which people are assigned as members of the specific role.

Click OK when you're finished changing the resource permissions for a given page.

Figure 15-4:
Managing permissions for a page.
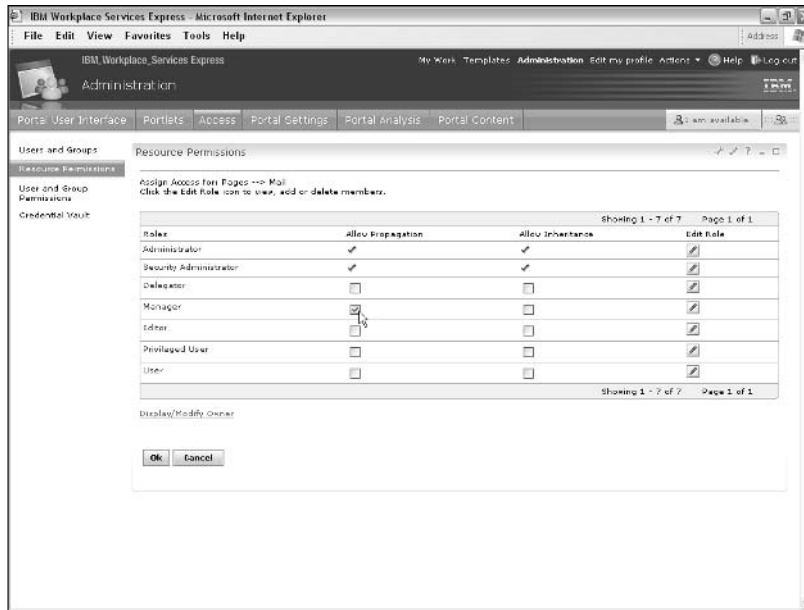
Setting user and group permissions

In the previous section, "Setting permission for a page," I discuss how you determine access for a given resource. Alternatively, you can approach access from the user's perspective. In effect, you select the person and then determine what resources he or she can and can't access.

Simply click the User and Group Permissions button to manage access for an individual person or for a group of people. After you search for the person or group, you navigate through the entire resource hierarchy (as described in the previous section) and select the resources for which the person or group has access.

Managing Portal Content

The Navigator's Portal Content button provides the opportunity to manage how your team spaces and document libraries function.

Keeping things fresh with workplace policies

A *workplace policy* keeps a team space or document library in check. You can specify the maximum size to which the team space can grow, and also set up use policies to determine what happens if a team space or document library languishes, unused, on the WSE server for a specified period of time. If and when a team space is getting close to either threshold, WSE send a warning e-mail message to whomever you specify.

> **TIP**
>
> Although they're not required, policies are helpful management tools, especially if you have lots of team spaces. On the other had, if you only have five or six team spaces, policies probably won't be worth the trouble.

Figure 15-6 shows the Workplace Policies list, which is used to set up the policies that WSE has available.

Figure 15-6: Use policies to help manage your WSE server.

As you can see in the figure, WSE lists three policy options: Default Team Space Policy, Default Web Conference Policy, and Default Workplace Application Policy.

Because WSE doesn't support Web conferences, and because the like-named policy was included in WSE by mistake, you only need to worry about team space and application policies. Team space policies apply to (you guessed it) team spaces, and application policies are used with document libraries.

In the unlikely event that you have so many team spaces and document libraries that you need to create multiple policies to manage them, you can use the New Workplace Application Policy button to do exactly that.

It's conceivable, for example, that you have two kinds of team spaces — maybe one bunch that was created by employees of your company, and another that was created by business partners — so you could have different policies to help you manage each. You can set up different rules for different kinds of team spaces, but quite frankly, I think it's pretty unlikely that you'll need to micromanage team spaces this much.

When you create a new policy or edit an existing one, use the fields on the New Properties form (shown in Figure 15-7) to determine how the policy functions. There are five fields on the form:

- **Name:** The policy's *nom de plume*.

- **Maximum Workplace Application Size:** These fields determine what, if anything, is considered to be the maximum size for the team space or application. If you set a maximum size, you can also use the Send Warning Message At field to decide when WSE starts squawking about that the team space is bloated.

- **Send Warning Message When Maximum Workplace Application Size Is Exceeded To:** If you activate this option, choose one or more roles to get the notification e-mail from WSE that team space needs to lose some weight; you can also warn all visitors that the team space is tipping the scales by clicking the Display Warning Message in Home Page of Application check box.

- **Length of Time to Keep After No Activity:** This setting determines how long a team space or document library has before WSE considers it to have gone stale because of inactivity.

- **Send Warning Message for Maximum Days with No Activity To:** Select the people to whom WSE sends an administrative e-mail warning about a team space that is suffering from lack of use.
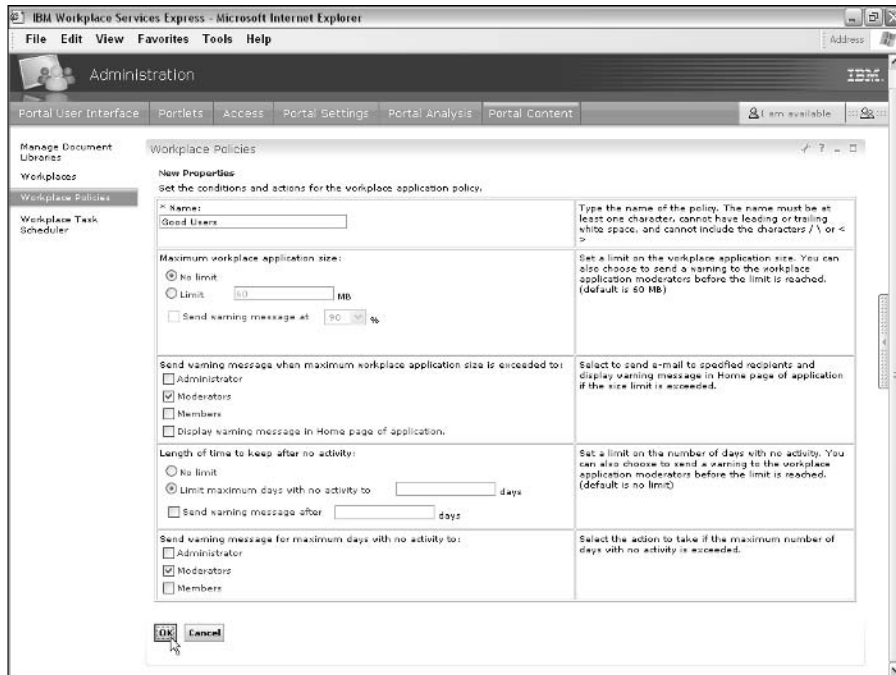
Figure 15-7:
Setting up
the rules for
a workplace
policy.

Applying workplace policies

After you define the thresholds and parties to be notified, you can then choose the team spaces and document libraries to which the WSE policy applies.

Use the following steps to apply a policy to a team space or document library:

1. **Log in to WSE with a username and password that has administrative rights.**

   The home page is displayed.

2. **Click the toolbar's <u>Administration</u> link.**

   The WSE Administrator forms are displayed.

3. **Click the Navigator's <u>Portal Content</u> link.**

   The Portal Content Management page is displayed.

4. **Click Workplaces.**

   The Workplace Policy page appears, as shown in Figure 15-8. The table shows the list of all the team spaces and document libraries, and which policy is being used with the application.

Figure 15-8:
Select a
team
space or
document
library and
use the
Assign
Policy list
to set
its policy.
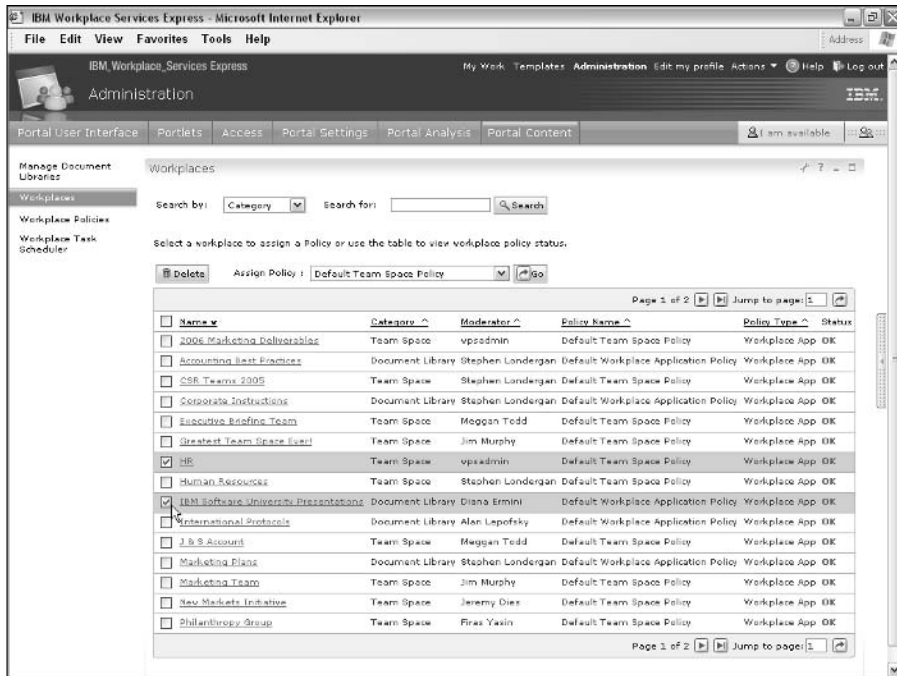
5. **Select the team space or document library to which you want to add a policy by clicking the selection check box next to its name.**

   You can select more than one option.

6. **Choose the policy to apply to the applications you selected by selecting it from the Assign Policy drop-down list.**

7. **Click the Go button.**

Timing workplace tasks

Some team spaces and document libraries use *scheduled tasks;* for example, the Team Tasks form sends e-mail notifications when tasks are nearly overdue. Use the Workplace Task Scheduler to tell WSE what to do and when.

Unless you have built your own portlets, or perhaps downloaded a portlet from the IBM Workplace Solutions catalog, you probably only have two tasks on your WSE server:

✔ **Update Overdue Team Tasks:** Part of the Team Tasks Form portlet, this task runs at the time you specify. WSE examines the team tasks to make sure that everything is up-to-date and on track.

✔ **Collect Workplace Notifications:** Part of workplace policies, as discussed in the previous section, this task analyzes all of the WSE team spaces and document libraries vis-à-vis their respective workplace policy and sends the administrative e-mails for any that have exceeded their thresholds.

As you can see in Figure 15-9, the Workplace Task Scheduler indicates whether or not a given task is active in the Enabled column; select a task and click the Enable or Disable button to determine whether or not WSE should run the task.

When you click the name of a task, WSE displays the Workplace Task Scheduler form, as shown in Figure 15-10. Use the fields on the form to select the time of day when the task will be run, as well as the frequency (daily, weekly, and so on).
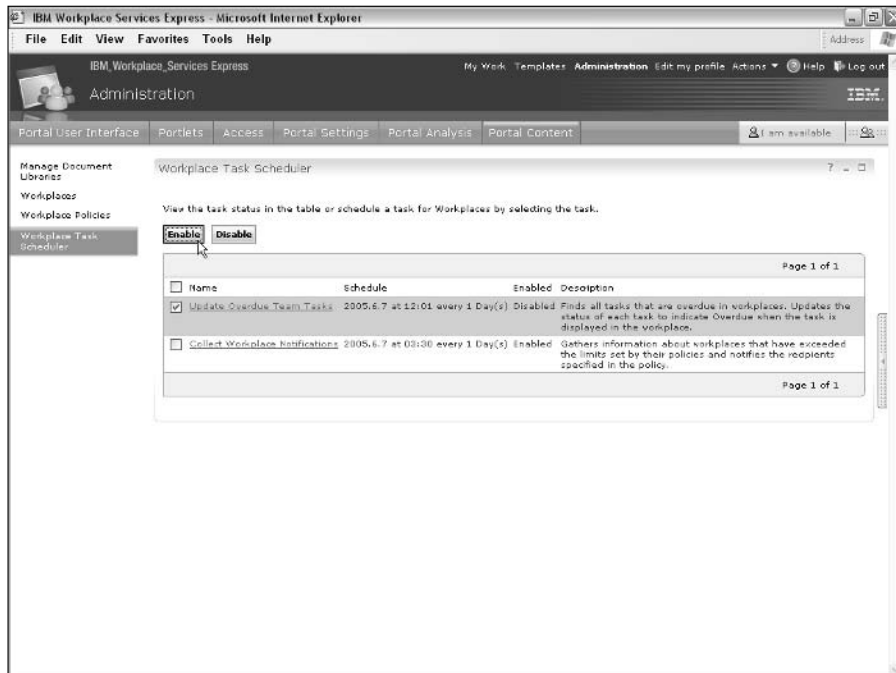
Figure 15-9:
Use the Workplace Task Scheduler to determine when and if a given task will be run.

Figure 15-10:
Use the
Workplace
Task
Scheduler
form to
determine
the exact
time and
frequency
that a given
task will run.

Click the OK button when you are finished scheduling a workplace task.

Managing pages

The WSE Administrator includes management features for pages, similar in many ways to the page management tools I discuss in Chapter 4.

As you can see in Figure 15-11, the Manage Pages form is displayed when you click the Navigator's Portal User Interface button.

TIP

It's a pretty safe bet that the first thing you do after clicking the Navigator's Portal User Interface button is click My Portal in the page list, because it contains the user pages that make up your portal.

You use the Manage Pages form to create and manage three types of portal resources:

New page

New label

✔ **Pages:** 'Nuff said.

✔ **Labels:** Used to separate content on a page. For example, on a page that contains other pages, you might use a label to put a separator in the list of pages that appears on the left.

New url

✔ **URLs:** An external Web page, or a link to a WSE Web page.

REMEMBER

If a given page contains child pages, its name will be a link; click the link to manage the page's children pages.
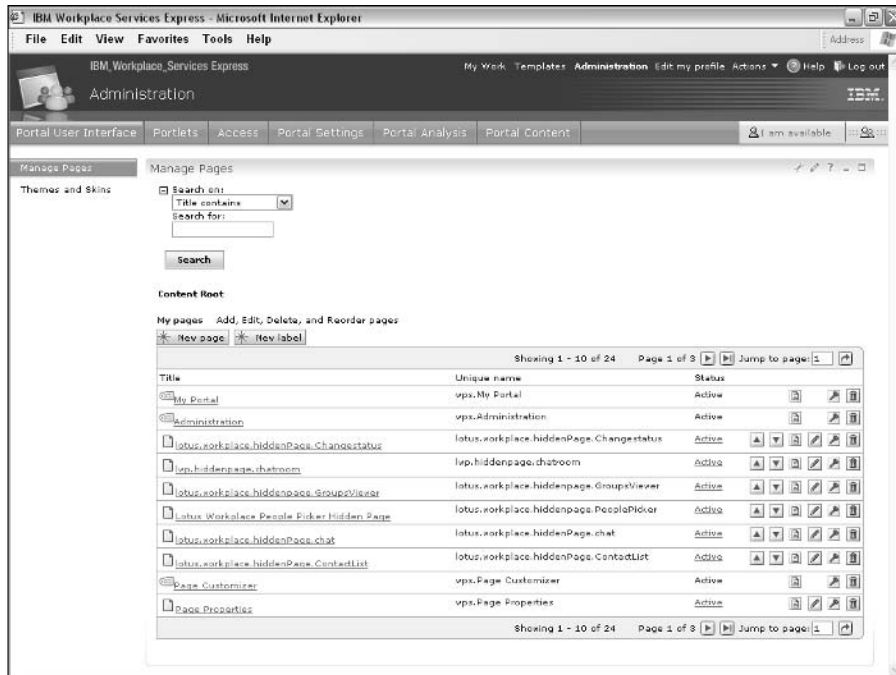
Figure 15-11:
Manage
pages,
labels, and
URLs with
the Manage
Pages form.

When you use the New Page, New Label, or New URL buttons, the new resource comes into the world as a child of the page you're editing, and as a sibling, so to speak, of the pages that are already on the page you are working with. If, for example, you are viewing the Mail page when you add a new page, after the new page is created it is listed on the Mail page alongside the Calendar and To Do pages. If, on the other hand, you create a new page while viewing My Portal, the new page will be listed amongst the Welcome, Mail, Team Spaces, and Search pages.

For each existing page, URL, or label that the Manage Pages form lists, you can perform six actions:

✔ **Move Up:** Move the page up, or to the left, among its peer pages.

✔ **Move Down:** Move the page down, or to the right, among its peer pages.

✔ **Edit Page Properties:** Change the page's title and properties.

✔ **Edit Page Layout:** Determine the number of columns on the page and which portlets the page will contain.

✔ **Set Page Permissions:** Determine who can see and use the page.

✔ **Delete:** Remove the page and its contents altogether (proceed with caution).

Changing the look and feel of WSE with themes and skins

Skins and *themes* control the way WSE presents itself to users. Such attributes as the portal's colors, button placement, and so on, are under your control. WSE includes 20 themes, and you can make your own too.

Skins have a subtle effect; they determine the shading and appearance of the borders that surround each portlet. Themes make more noticeable changes to the WSE interface.

Some of the themes have names that are self-explanatory; you can probably guess that choosing Lime, for example, makes WSE take on a distinctive green tint. When you change themes, you can adjust navigation models for WSE. For example, you can specify whether the Navigator and Page buttons are presented in a top-down or left-right orientation. Figure 15-12 shows the Forest theme.

Playing with the WSE themes is a fairly safe thing to do, so experiment with the themes until you find the color and navigation combination that suits your fancy.

Two of the themes that come with WSE are special:

✔ IBM Workplace Services Express is the default, out-of-the box theme. The figures in this book use this theme.

✔ Alloy looks and functions very much like the IBM Workplace Services Express theme, but does not include any IBM branding.

Use the following steps to change the theme that WSE uses:

1. **Log in to WSE with administrative rights.**

   The home page is displayed.

2. **Click the toolbar's <u>Administration</u> link.**

   The WSE Administrator forms are displayed.

3. **Click Themes and Skins.**

   The Themes and Skins page is displayed.

Figure 15-12:
The Forest theme is very green.

4. **From the Themes drop-down list, select the theme you want WSE to use as the default. Click the Set as Default Portal Theme button.**

   WSE tells you that the new theme is in effect.

5. **Exit the WSE Administrator.**

   Click the My Work link. You won't see your changes take effect until you log out as an administrator.

Getting a peek behind the scenes with skins and themes

For those in the know, you can create your own WSE skins and themes by editing the Java Server Pages (JSPs), Cascading Style Sheets, and HTML pages that make up each theme and skin.

You can find a skin's files in a directory on the WSE server, such as

```
C:\WebSphere\AppServer\installedApp\yourservername\wps.ear\
   wps.war\skins\html\skinname\Control.jsp
```

(continued)

(continued)

Files associated with a theme are in a different directory, such as

```
C:\WebSphere\AppServer\installedApp\yourservername\wps.ear\
    wps.war\themes\html\workplace\Default.jsp.
```

The ins and outs of Java Server Pages and Cascading Style Sheets are, quite frankly, not for the faint of heart. If, dear reader, you're already comfortable working with such, here are a few tips for editing WSE skins and themes. In general, you need to restart WSE every time you make one of these modifications.

To get started, locate the file named `ibm-web-ext.xmi`, which is usually in a directory along the lines of

```
C:\WebSphere\AppServer\config\cells\yourservername\applications\
    wps.ear\deployments\wps\
```

In this text file, find the string `reloadingEnabled="false"` and change it to `reloadingEnabled="true"`. Restart the WSE server after you edit and save this file.

Make sure, when you are done creating your new skin or theme, that you set the `ibm-web-ext.xmi` file's `reloadingEnabled` attribute back to `"false"`.

Make a copy of the theme and/or skin you want to modify by copying the theme's and/or skin's directories; use the WSE Administrator's Add New Theme button to register the new skins and themes. You can then edit the theme and skin files you copied.

Resource strings for the buttons that are used in a given theme and skin are contained in a series of files named `workplacetheme_XX.properties`, where *XX* indicates the language the file contains; for example, `workplacetheme_fr.properties` contains the resource strings for French. These files are typically found in `C:\WebSphere\PortalServer\shared\app\nls`.

So-called general audience resource strings (such as the portal's title, which displays each page's title) are also found in `C:\WebSphere\PortalServer\shared\app\nls`, and have similar names, such as `workplacetheme_XX.properties`.

To add a custom image as the portal's logo, you need to edit two toolbars: `ToolBar Includes.jsp` and `TemplateToolBarIncludes.jsp`; add an HTML tag, such as `<img src="myownlogo.gif" width="235" height="25" alt="My Own Company Logo">` in the `<%-- Link to content --%>` section of each JSP.

You can find the reference of record for modifying WSE and WebSphere skins and themes online from IBM. Visit

```
http://publib.boulder.ibm.com/pvc/wp/502/ent/en/InfoCenter/
    index.html.
```

Getting Specific Administrative Tips

Here are a few administrative tips — things you might consider if you want to make WSE a little better or easier to use.

Configuring the Forgotten Password page

The WSE Login page includes a link for people to click when they've forgotten their password; the page itself is shown in Figure 15-13. To add your own instructions to this page, edit the file called engine_XX.properties in the C:\WebSphere\PortalServer\shared\app\nls directory. If you're editing the version of this page for English users, for example, you edit engine_en.properties.
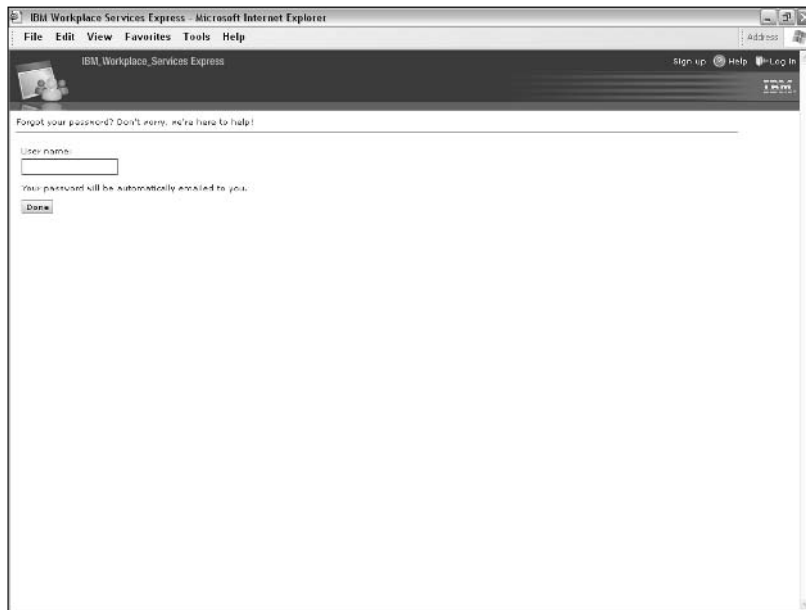
Figure 15-13: You should customize WSE's Forgotten Password page.

Find the section of the file called Forgot Password, and edit the forgot.sample, forgot.support, forgot.help, and forgot.secret statements to suit your needs. Doesn't Figure 15-14 look better?
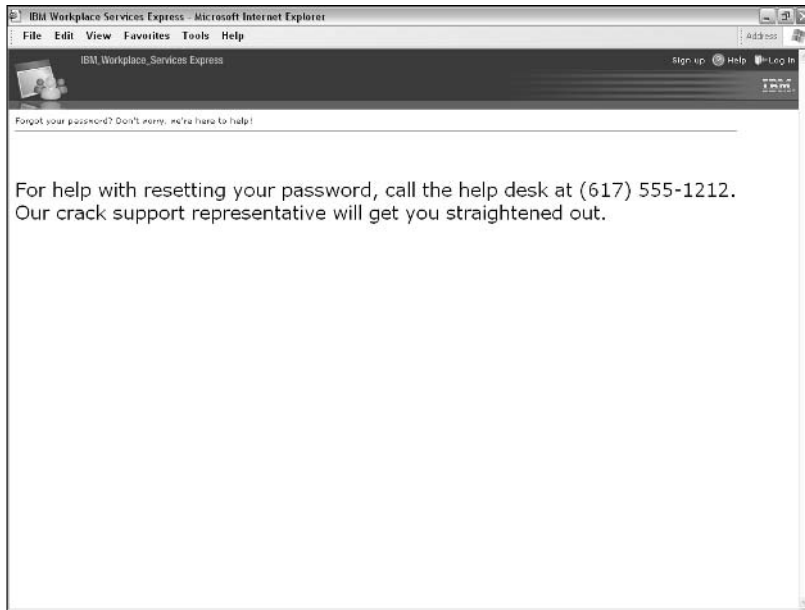
Setting auto logout features

For privacy and security reasons, WSE automatically logs out inactive users, usually after 30 minutes. These steps let you change the amount of time WSE waits before forcing a user to log in again:

1. **Log in to the WebSphere Application Server administrative console.**

   The URL for the WebSphere Application Server administrative console is probably something like `https://yourservername:9044/admin/logon.jsp`.

2. **Choose Servers➪Application Servers➪WebSphere Portal➪Web Container➪Session Management.**

   The WebSphere Session Management form is displayed, as shown in Figure 15-15.

3. **In the Session Timeout field, enter the number of minutes WSE should wait before kicking an inactive user out of the system.**

   The default setting is 30 minutes.

Figure 15-15:
Use the
WebSphere
Adminis-
trator to
change the
auto logout
time period.

4. **Click OK and then click the Save link.**

5. **Click the Logout link to apply the new setting and close the WebSphere Administrator.**

   You have to log out for your changes to take effect.

Adding a Web-based Search engine to WSE Search

WSE's Search facility includes three tabs, by default: Applications, Documents, and Team Spaces. If you want your searches to be a little more global, you can follow these steps to add a new tab to WSE search, so that users can use an external search engine to search the Web:

1. **Click the Navigator's Search button.**

   The Search form is displayed.

2. **Click the Search portlet's Configure button (which looks like a little wrench).**

   The Search Source list is displayed.

3. **Click the Add Search Source button.**

4. **The Search Source Details form contains three fields, which you must complete:**

   • **Name:** What you enter in this field becomes the name of the tab that WSE shows in the Search portlet.

   • **Description:** A hint.

   • **Web Address:** The URL for the search engine you're adding.

   To add Google, try this URL:

   ```
   http://www.google.com/search?hl=en&ie=UTF-8&oe=UTF-
           8&q=
   ```

5. **Click OK to add the new Search tab.**

6. **Click OK again to save the new Search tab.**

   Figure 15-16 shows the Search portal with a Google tab. If you use the Google URL supplied in Step 4, WSE passes search terms between the Search portlet's tabs. In other words, if you were to search Team Spaces for *books by londergan,* when you click the Google tab, you automatically see the results of a Google search for *books by londergan.*

Changing the WSE default language

Use these steps to determine WSE's default language. This is the language WSE will use on the Login page, and for any page in the portal, when the page is viewed by a person whose profile does not have a language setting. Follow these steps:

1. **Log in to WSE with administrative rights.**

   The home page is displayed.

2. **Click the toolbar's <u>Administration</u> link.**

   The WSE Administrator forms are displayed.

3. **Click the Navigator's <u>Portal Settings</u> link.**

   The Portal Settings page is displayed.
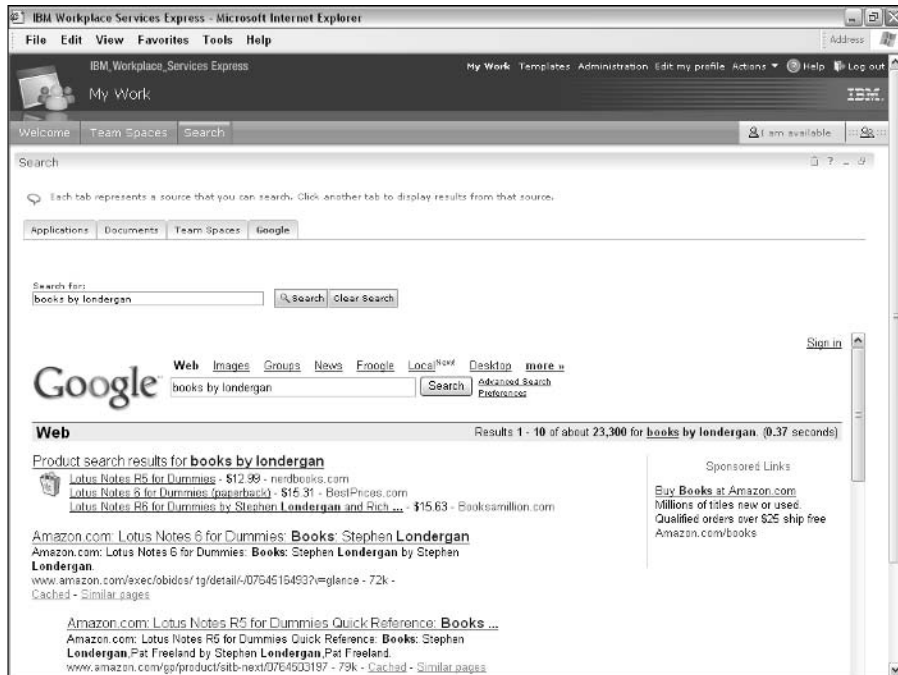
Figure 15-16:
You can add an external search engine, like Google, to WSE's Search portal.

4. Click Global Settings.

The Global Settings form is displayed.

5. Select the WSE default language from the Default Portal Language list and click the Save button.

You need to stop and restart WSE before the new language setting takes effect.

Part VI

The Part of Tens

The 5th Wave   By Rich Tennant
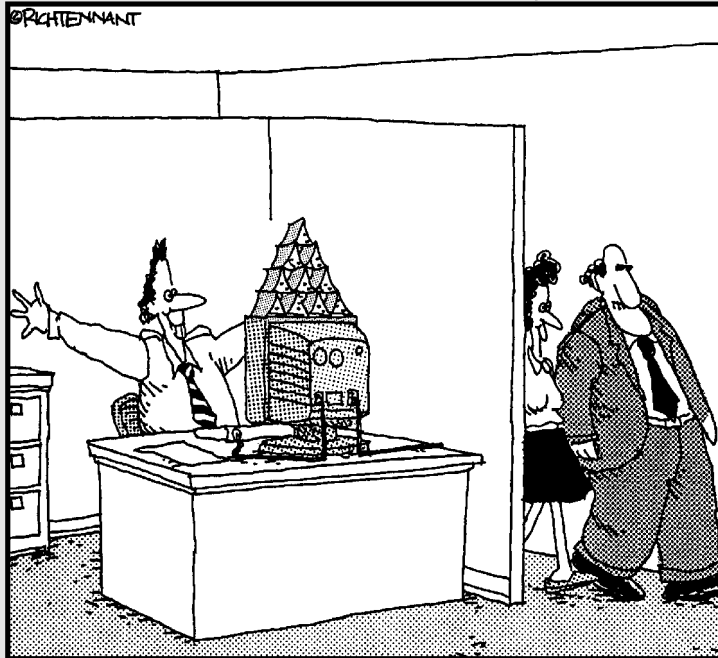
"Why, of course. I'd be very interested in seeing this new milestone in the project."

In this part . . .

You have ten toes to wiggle in the sand, ten idle fingers to tap, and ten dollars (I hope) to spend. The chapters in this part also contain sets of ten things I thought you would find useful or interesting or, perish the thought, even necessary.

Don't consider these chapters to be frills, icing on the cake, or lace on the shirt-front of life. No, these chapters are the result of hours and hours and hours of list making on the part of your earnest and hard-working *IBM Workplace Services Express For Dummies* author, who likes to think that you will be glad he included all this information. You will indulge him, won't you?

Chapter 16

Ten (Okay, Eight) Workplace Services Express Tips

*I*mpress your friends and coworkers with the following tips and techniques.

Turning Off That Pop-up Ad Blocker

If you have external pop-up ad blocker software, or if your Web browser uses a pop-up ad blocker, you may have trouble getting WSE to do what it needs to do. The WSE software often needs to open a new browser window in order to accomplish a task, so if you're using pop-up blocker software, you should turn it off when you're using WSE.

Bookmarking Anything and Everything

Most people know that bookmarking the WSE Login page is a smart idea, but did you know you can bookmark anything? If, for example, you frequently use the same team space, or frequently access a particular document in a particular document library, create a bookmark when you have the page open. You just saved yourself a step the next time you need to visit the team space or document library!

Checking Out the IBM Workplace Solutions Catalog

WSE comes with a ton of built-in portlets, but that's just the beginning. You can find a whole world of additional portlets just waiting for you. WSE works with any IBM WebSphere 5.1 portlet — and if you don't know what that means, you probably don't need to know what that means. The best place to get new portlets is the IBM Workplace Solutions catalog, which is owned and operated by IBM. Not all portlets are free, but some are, and this Web site is definitely worth a look-see: `http://catalog.lotus.com/wps/portal/workplace`.

Creating Documents with the Built-in Editors

Sometimes Microsoft Office isn't the right answer, so don't forget about the Document, Spreadsheet, and Presentation editors that come with IBM Workplace Services Express. You wouldn't write the great American novel with the WSE's document editor, but it's a nice to have when Microsoft Word isn't appropriate.

Checking Out the IBM Web Site

The best place to look for information about IBM Workplace Services Express is, not surprisingly, IBM's own Web site. This site is the best place to check technical specifications, download the software, and become a member of the worldwide WSE community. Take a look at `www.ibm.com/software/workplace/servicesexpress`.

Making a Team Space for Anything

Team spaces are easy to create and use, so think outside of the proverbial box and use WSE early and often. The more team spaces you create and the more you use WSE, the more ideas you'll have for using WSE.

Using the Rich Text Editor's Menus

Press Shift+Control+M when you use the Rich Text Editor (see Chapter 12) to use its built-in menus. Also check out the Cheat Sheet for a list of the menus and buttons.

Cleaning Up the Portlet Palette

If your palette is cluttered, click the Portlet Palette's Edit icon (it looks like a pencil), click the <u>Portlets Category</u> link, select the portlets you want to remove by clicking the selection box, and click the Remove button and then the OK button.

Chapter 17

Ten Things You Should Never Do with Workplace Services Express

In This Chapter

▶ Playing it safe with your password

▶ Experimenting with the tools

▶ Getting over the fact that someone might mess up your documents

▶ Logging out

*I*n this chapter, you find a list of ten WSE-related things you should *never* do. Heed these warnings and save yourself some heartbreak; or ignore them at your own peril.

Don't Tell Anyone Your Password

This probably isn't the first time you've heard this, but the first no-no in IBM Workplace Services Express is sharing your password. At some companies, it's grounds for dismissal. Because so much of your access to WSE materials is based on who you are — what team spaces you can use, which documents you can edit, and everything else — you wouldn't want an unauthorized person to be able to log in to WSE and wreak havoc. And writing your password on a sticky note and sticking it to your monitor isn't such a hot idea, either. Make your password easy for you to remember and hard for others to guess. And then keep it quiet.

Don't Resist Getting Your Feet Wet

Are you having WSE anxiety? Don't! WSE is easy to use, and is pretty forgiving. The best way to start using WSE is to *start using WSE*. Create a team space, post some documents, and play around with some pages on your own. Go ahead, the Portlet Palette won't bite. If you're not sure how to do something, experiment anyway. What's the worst that could happen?

Don't Change Your User ID on Your Own

It's just not a good idea. If you do need a new or different user ID, that usually happens in your external LDAP directory, and not in WSE. Talk to your administrator or manager if you want to change this kind of information.

Don't Forget the Team

Wouldn't life have been better in preschool if everyone had remembered to share? It's not *yours,* it's *ours.* The kind of work you do in WSE and the kind of information you post is, by its very nature, shared. That means that sometimes you need to think twice about changing a document or page you see in WSE; even though you might have ideas about how a document could be improved, you'll probably want to gather consensus from the team before making a ton of wholesale changes.

Don't Use Office When the Productivity Components Will Do

Sometimes Microsoft Office isn't the right choice, so don't forget about the Document, Spreadsheet, and Presentation editors that come with IBM Workplace Services Express. They're nice to have if Microsoft Word isn't appropriate.

Don't Get Too Caught Up in WSE Discussions

Many WSE team space templates provide a page for discussion forums, but the discussion forums may not be as robust as you need them to be. They don't support rich text, you can't attach files, and so on, so they may be impractical — even if you do like using them. WSE chat rooms — where your team can work together in real time — are way, way better.

Don't Forget to Log Out

When you're leaving WSE (is it time for lunch already?), make sure to log out in order to prevent any unauthorized access. Logging out only takes two seconds, and logging back in takes even less time when you return. In other words, you really have no excuse. . . .

Don't Forget to Publish a Document

Remember to click that Publish button when you are finished editing an older document or creating a new document. Otherwise, your changes may be lost.

Don't Manage Users in WSE

In almost all cases, user management (defining user IDs and passwords, specifying which person belongs to which group, and stuff like that) is best handled externally, as far as WSE is concerned. See Chapter 15.

Don't Talk to Strangers

And it's not a good idea to take wooden nickels, either.

Chapter 18

Ten (Okay, Seven) Special Reminders If You Use Microsoft

1s your company a Microsoft shop? Here are a few things you should keep in mind if you're a Microsoft person (or working for a company that uses a lot of Microsoft stuff) using IBM Workplace Services Express for the first time.

Using Round-Trip Editing

WSE is designed to work very, very closely with Microsoft Office. *Round-trip editing* is the fancy feature that lets you create a Microsoft Office document (or spreadsheet, or presentation) in WSE and save it into a WSE document library, where it's available to the whole team. See Part IV for everything you need to know about handling documents in WSE.

If you use Office, you should *not* be importing documents on a regular basis. Use round-trip editing instead. It's faster and more convenient.

Sending E-mail from within the WSE Program

WSE comes with a built-in portlet that you can use to add your Microsoft Exchange–based e-mail, calendar, and contact list to the Mail page. You don't have to toggle over to your Outlook inbox!

Remembering the Desktop Components

Sometimes Microsoft Office isn't the right answer, so don't forget about the document, spreadsheet, and presentation editors that come with IBM Workplace Services Express. You wouldn't write the great American novel with the WSE's Document editor, but it's a nice to have when Microsoft Word isn't appropriate.

Using WSE with any Version of Microsoft Office

WSE's content features (drag-and-drop publishing, round-trip editing, desktop components, and so on) work with Microsoft Office 97, Office 2000, and Office XP.

Following the Single Server Promise

WSE is intended to run on as little hardware as possible. Sometimes that means you run WSE on a single server, or (more likely) you run WSE on one server, but point it at a different server for its LDAP (Lightweight Directory Access Protocol) directory — otherwise known as your company's address book. WSE is intended to work very well alongside Microsoft's Active Directory.

Moving Beyond Windows and Office

Extended teams — especially those that include people from outside your organization — don't necessarily use the same software you use. Some may

use an older version of Microsoft Office, and others may use Linux. WSE eliminates the compatibility issues that may come up, so feel free to extend your idea of what a team is.

Relaxing

Despite the fact that WSE comes from IBM, and despite the fact that IBM and Microsoft compete in many areas, WSE is designed to be a very easy and natural choice for Microsoft customers. Don't fall into the trap of thinking that just because your company is a Microsoft shop, you need to use all Microsoft products. WSE is designed to work in any kind of company and with just about any kind of technology, so the hope is that you'll find that WSE is a great complement to whatever Microsoft software you already use.

Chapter 19

Ten (Or So) Special Reminders If You're a Penguin

● ●

In This Chapter

▶ Getting comfortable with the productivity components

▶ Installing JRE

▶ Avoiding the desktop components

● ●

*D*o you use Linux? Or are you part of a team that uses Linux? Here are a few things to keep in mind.

Getting the Support You Need

If you're reading this chapter, you don't need to be told that Linux has started to take the world by storm. As Linux becomes more and more popular, a lot of software vendors are rushing to include Linux support in their applications. But sadly, Linux support is often an afterthought; some software that boasts both Windows *and* Linux support treats Linux users as second-class citizens. That is *not* the case with WSE; it's been designed from the get-go to deliver the same functionality to users, whether they use the Linux operating system or Windows. Put simply, WSE works great with Linux.

Using the Productivity Components

Penguins should become comfortable with WSE's built-in productivity components for creating simple documents, spreadsheets, and presentations. These components are essential to the collaborative functions of IBM Workplace Services Express. The productivity components help you create and share content with the other people on your team, who themselves may or may not be Linux users, and who may or may not use Microsoft Office.

Installing That Special Applet

Linux desktop users need a special applet to work with WSE document libraries — specifically to connect WSE with your local document editing applications, to communicate with the desktop, and to let you import multiple files from your local file system to the WSE document libraries. The applet, in turn, requires you to have a Java Runtime Environment (JRE) installed on your browser.

The good news is that the required applet is automatically downloaded and installed the first time you import a document. If you have a JRE installed, you're prompted to accept an IBM certificate. Not surprisingly, you should accept this IBM certificate when prompted to do so. That's all you need to do to install the applet.

Steering Clear of the Desktop Components

The desktop components that come with IBM Workplace Services Express — which allow Windows users to treat a WSE document library as a virtual Windows Explorer folder — do not work with Linux desktops. Skip them.

Moving Beyond the Users

IBM Workplace Services Express isn't just about the users. Sure, WSE supports Linux clients, but don't forget you can also use Linux as the operating system for your WSE servers, too.

Remembering that Not Everyone Uses Linux

Some members of your team will inevitably use Windows and Office. Take pity on them, but don't forget them. Be prepared, and don't be surprised if you see some documents in your team spaces that originated in Microsoft Office.

Keeping in Mind that WSE Works with Many Versions of Linux

So you don't use plain-vanilla Linux? IBM Workplace Services Express is compatible with Red Hat Enterprise Linux and SuSE Linux Enterprise Server; check `www.ibm.com/software/workplace/servicesexpress` if you need more particulars about a release, which Linux components need to be installed, and so on.

Part VII
Appendixes

In this part . . .

Your appendix is a small organ located on the left side of your lower abdomen. Although doctors long thought it to be a vestigial organ of unknown origin, new research has shown . . . Whoops, wrong book.

The brief appendixes in this part contain some important information about Workplace Services Express, none of which will cause swelling or inflammation.

Appendix A

Maybe Mail, Maybe Not

*B*ecause you use your inbox all the time, it's fairly common that you'd want to have access to it from within IBM Workplace Services Express; almost every example presented in this book, for example, includes a tab for accessing your mail. Click the Mail tab and you can find your inbox, calendar, contact list, and so on — assuming that it's configured to work with IBM Workplace Services Express.

WSE comes with a set of portlets that you can use to hook up with your mail system. This short appendix describes the whys and hows of configuring your e-mail with WSE. Listen up if you're an IT administrator!

Getting Your Mail Program in Line with WSE

WSE has a lot of features built in, but e-mail isn't one of them. WSE provides the portlets you can use to wire WSE up with whatever mail system you *already have.*

There are eight portlets that come with WSE. One of them is surely the right one to interact with your current mail program:

✔ **Consolidated Mail Client:** Use this portlet to connect WSE to an IMAP, POP3, Microsoft Exchange 5.5, or Microsoft Exchange 2000 server.

✔ **IBM Internet Mail Box:** Use this portlet to connect to an Internet-based mail server that receives, composes, and sends mail (you can use many Web-based e-mail programs, such as Gmail or Hotmail).

- ✔ **Microsoft Exchange 5.5 Mail:** This portlet connects WSE to (you guessed it) Microsoft Exchange 5.5 so that you can read and send e-mail messages.

- ✔ **Microsoft Exchange 5.5 Calendar:** This portlet connects WSE to Microsoft Exchange 5.5 so that you can work with your meetings and appointments.

- ✔ **Microsoft Exchange Contacts:** This portlet connects WSE to Microsoft Exchange 5.5 so that you can work with your Microsoft contacts.

- ✔ **Microsoft Exchange Notes:** This portlet connects WSE to Microsoft Exchange 5.5 Notes.

- ✔ **Microsoft Exchange Tasks:** This portlet connects WSE to Microsoft Exchange 5.5 so that you can work with your meetings and appointments.

- ✔ **Domino Web Access:** This portlet connects a Domino server so that you can interact with your mail, calendar, to-do list, contacts, and notebook.

TIP

If your mail system isn't listed here, or if you want to download the latest and greatest version of the mail portlet you'll be using, visit `http://catalog.lotus.com/wps/portal/workplace`.

WSE's Mail tab in the Navigator comes preloaded with three pages of mail-related activities. The three pages are called Mail, Calendar, and Address Book. Setting up WSE to connect with your (or your users') e-mail is simply a matter of picking the right portlet for the right page and then doing a little configuration work (entering the name of your POP3 server, for example).

Setting Up WSE and Your Mail System

In the following section, I show you how to set up Lotus Domino–based mail. If you don't use Domino, use one of the other portlets instead. The steps for setting up, say, Microsoft Exchange, or Internet-based mail are remarkably similar to those I present in the next few pages — except for Steps 4 and 6, when you pick one of the portlets.

Adding the Domino Web Access portlet to the Mail page

Use these steps to use WSE with IBM Lotus Domino–based e-mail:

1. **Click the Mail tab in the Navigator.**

   The Mail page appears.

2. **Click the Portlet Palette.**

   The WSE Portlet Palette slides out to show you the tools you have available. (That slider thing is still my favorite part of WSE.)

   Because the Domino Web Access portlet probably isn't in the default list, you have to add it.

   If you see the Domino Web Access portlet in the palette, skip ahead to Step 6.

3. **Scroll to the bottom of the Portlets list and click Add.**

   The Add Item To Category Portlets form appears.

4. **Enter** Domino **in the Title Contains field and click OK.**

   The list of matching portlets appears.

5. **Select Domino Web Access by clicking the check box that appears next to it. Then click OK.**

   Domino Web Access is listed among the available portlets in the Portlet Palette.

6. **Add the Domino Web Access portlet to the Mail page.**

   Simply drag it from the Portlet Palette to the page.

   The portlet appears on the page and (usually) magically displays your e-mail inbox, in all its sartorial splendor.

Configuring the Domino Web Access portlet

The Domino Web Access form, shown in Figure A-1, is used to control how the portlet interacts with and displays your mail. Click the Domino Web Access portlet's Edit button to open the form.

Figure A-1:
The Domino Web Access portlet is used to connect WSE with a Domino-based mail system.
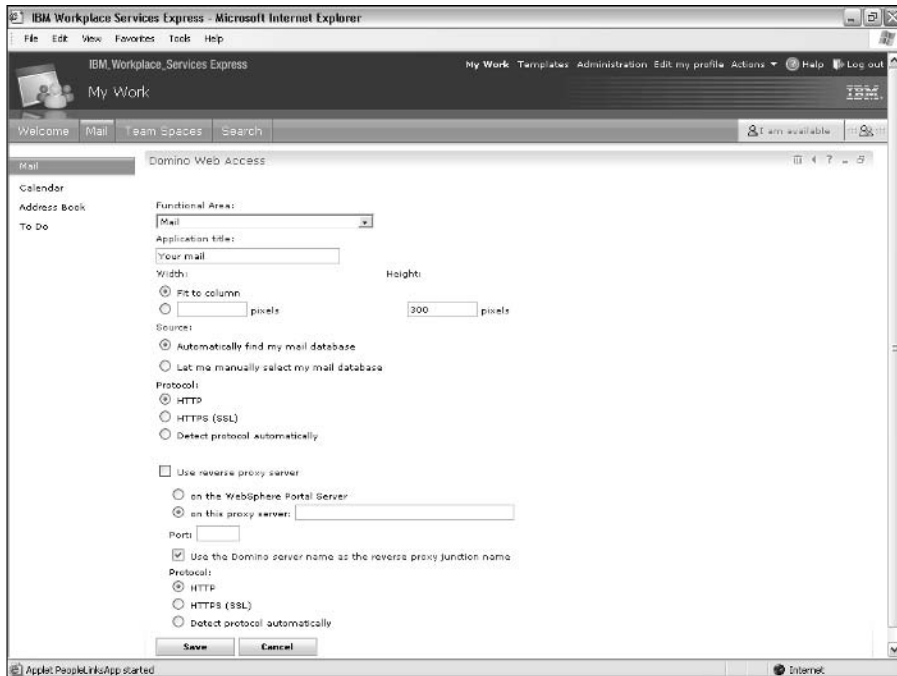
As you can see in the figure, the form has several fields that you can use to fine-tune how WSE interacts with Domino:

- **Functional Area:** Because the Domino Web Access portlet can display more than just your inbox, use this field to select what the portlet will display.

  In the example described in the previous section, you'd select Mail; if you were adding the Domino Web Access portlet to the Calendar page, you'd pick Calendar in this field instead.

- **Application Title:** This title appears at the top of the Mail portlet.

- **Width:** Determines how much of the screen the Domino Web Access portlet will take up when it's open.

- **Source:** Determines whether WSE should automatically interact with the Domino server to determine your mail file's location, or if users will have to enter the server name, filename, and port number manually.

- **Protocol:** Determines which protocol WSE will use when communicating with the Domino mail server.

- **Use Reverse Proxy Server:** If your mail server is protected by a reverse proxy server, use the fields in this section to indicate the server's name and other particulars.

Knowing the Domino Web Access portlet's other attributes

The Domino Web Access portlet is also the portlet you use if you want to have access to your calendar, to-do list, Personal N&A book, and notebook.

> **TIP**
>
> There is one difference between using Domino-based mail with WSE and using Exchange-based mail with WSE. For Domino, you use one portlet, and then configure it to display your inbox, calendar, Personal N&A book, and so on. Although Microsoft Exchange sports all those same capabilities when used with WSE, you must use a separate portlet to access each.

The steps to make your Domino-based calendar and address book appear on the WSE Calendar and Address Book pages are almost the same as those described for adding your inbox:

1. **Open the page you want to add the portlet to — the Calendar page, for example.**

2. **Use the Portlet Palette to drag the Domino Web Access portlet onto the page.**

3. **Click the Domino Web Access portlet's Edit button and use the Functional Area field to change the portlet's content to the appropriate selection.**

   For example, if you're adding the calendar, select Calendar from the Functional Area drop-down list.

Depending on which Functional Area you choose, the Domino Web Access form may have a few more questions for you. For example, when you choose the Calendar option, the form automatically expands so that you can determine whether the default calendar will be one day, one week, one month, and so on.

> **TIP**
>
> You may want WSE to display your Domino-based notebook or to-do list in addition to your calendar. The easiest way to add them is to add the Domino Web Access portlet to your Calendar page, twice. You then point the top instance of the portlet at your calendar and point the second instance of the portlet at your to-do list or notebook.

Alternatively, you can add a new page to hold your to-do list or notebook.

Use these steps to add a new page altogether (you may need to log in with administrative rights to complete the steps):

1. **Click the <u>Administration</u> link in the toolbar.**

   The Portal User Interface page appears.

2. **Click Manage Pages.**

   The Content Root list (every WSE page on your server) appears.

3. **Click My Portal.**

   A list of pages in My Portal appears.

4. **Click Mail.**

   A list of pages in Mail appears.

5. **Click the New button to add a new page.**

   The New Page Mail form appears.

6. **Enter a name for the new page in the Title field.**

   If you're adding the notebook, type **notebook**.

   What you enter in the Title field is what's listed in the Mail page's Navigator.

   If you are creating one new page to hold both your Domino To Do list and Notebook, use the Properties field in the Advanced Options section of the form to make the page use two columns.

7. **Click the OK button. Then click it again.**

   The new page is listed among the other pages in Mail. Optionally, use the up and down arrow buttons to manually rearrange the pages.

8. **Click the Edit button to change the new page's content.**

   The Edit layout form appears.

9. **Click the Add Portlets button.**

   The Add Portlet form appears. If the Domino Web Access portlet isn't in the list, use the Search On field or the Jump to Page button to find it.

10. **Click the Selection box next to Domino Web Access and then click OK.**

11. **If you are finished adding portlets to the page, click Done.**

    If not, use the Add Portlets button to add more portlets and click the Done button when you have added them all.

    The list of pages in Mail appears.

    You can confirm that your new page has been added to Mail by clicking the toolbar's My Work button to close the WSE Administrator, and clicking the Mail tab in the Navigator.

REMEMBER

Because the page in the previous example was added through the WSE Administrator, the new page (which includes the Domino Web Access portlet) will be included in Mail for all of the portal's users. However, each person must configure the Domino Web Access portlet to display the notebook or to-do list.

No Mas? No Mail?

What if you don't want people to see the Mail tab in WSE? Perhaps your company uses Microsoft Outlook or Lotus Notes for e-mail, and consequently you don't want people getting confused and trying to use WSE to interact with their mail. Or perhaps you're inviting customers to collaborate with you in WSE; although such customers would visit your WSE server to interact with your shared team spaces, letting them visit *your* WSE server to read *their* e-mail doesn't make sense.

The easiest way to mask the Mail pages from all or some of the users in your organization and beyond is to use the Mail page's access permissions to exclude specific users.

Use these steps to change who can see and use the Mail page:

1. **Click the <u>Administration</u> link in the toolbar.**

   The Portal User Interface page appears.

2. **Click Manage Pages.**

   The Content Root list (which includes every WSE page on your server) appears.

3. **Click the Set Page Permissions button (which looks like a key) for the Mail page.**

   The Assign Access for Pages⇨Mail form appears.

4. **Assign the access as you see fit.**

   Figure A-2 shows the Resource Permissions page. What you do here depends on how you intend to manage the Mail tab. If, for example, you intend to hide the Mail page from everyone on the team, uncheck all of the boxes on the Assign Access for Pages⇨Mail form.
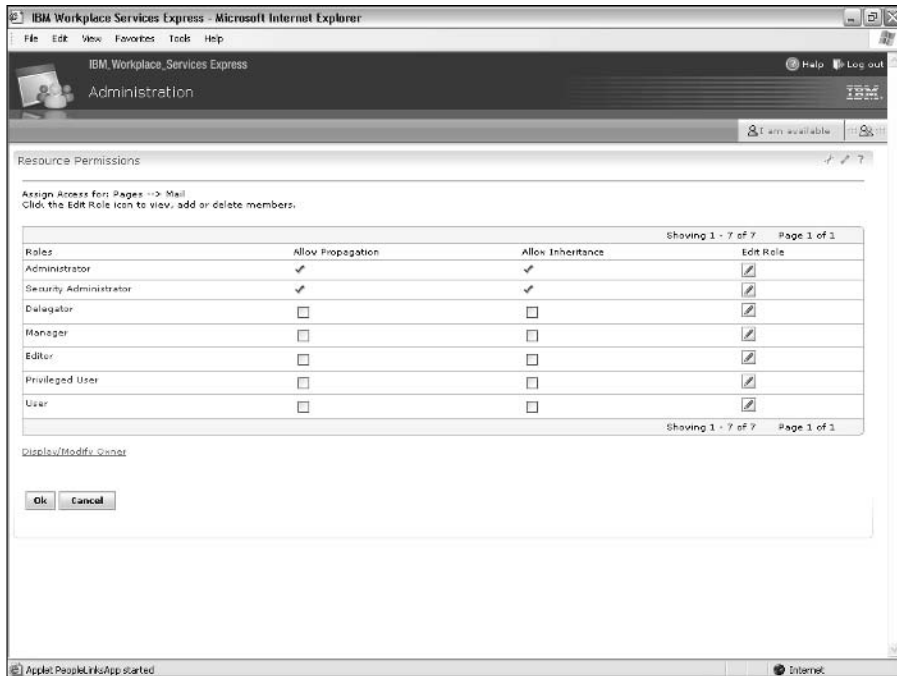
Figure A-2:
Changing
access
permissions
for the Mail
page.

If, on the other hand, you intend to hide the Mail page from some (but not all) members of the team, use the role check boxes to select the role that is required to use the page, and use the Edit Role buttons to determine which user or group is or isn't a member of the requisite role.

5. **Click OK, and then click Done, when you're finished changing the Mail page's access properties.**

Appendix B

The Desktop Components

. . . .

In This Appendix

▶ Understanding what the desktop components do

▶ Installing and configuring the components

▶ Using the desktop components with Microsoft Office

. . . .

*T*he desktop components that come with IBM Workplace Services Express provide an optional way to interact with document libraries through Windows Explorer, and this appendix explains how to install and use them.

REMEMBER

If you're a Linux user, skip this appendix. The desktop components don't work unless you use Microsoft Windows and have Microsoft Office installed. Also, some Windows users may prefer to interact with document libraries with their Web browsers, as we discussed in Chapters 11 and 12. If you prefer the browser view, go ahead and skip this appendix.

Discovering the Desktop Components

The IBM Workplace Services Express *desktop components* provide an interesting alternative for interacting with WSE document libraries, because they allow you to work with document libraries without using your Web browser.

When you install the desktop components, you can work with WSE document libraries directly from Windows Explorer. For example, you can drag a file from your desktop into the Desktop Components window, and, like magic, the file is automatically uploaded to the document library.

The desktop components also integrate with Microsoft Office. For example, you can use the Microsoft Word menu to save a file directly into a WSE document library.

REMEMBER

In effect, installing the desktop component software on your Windows workstation fools Windows into thinking that a WSE document library is a local folder.

Figure B-1 shows, for example, a Microsoft Windows Explorer window, viewing the folders and contents in a WSE document library. What's important to note is that those are the exact same folders and documents you'd see if you visited that same document library with your favorite Web browser.

If you want to use the desktop components, installing and running the desktop component software is pretty easy, as you can see in the following section. In fact, the desktop components software is typically installed so that it is loaded, automatically, every time you start your computer, and it runs in the system tray.
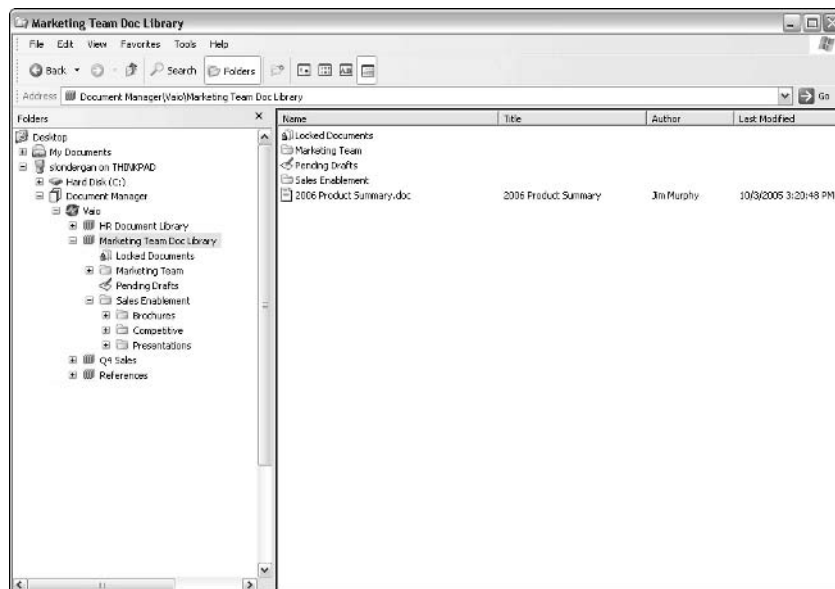
Figure B-1: The desktop components can connect Windows Explorer to a document library.

Installing the Desktop Components

Use these steps to install the WSE desktop components on a Windows workstation:

1. **Open a WSE document library.**

2. **Choose Tools⇨Install Desktop Components.**

   The desktop components Installation screen appears.

3. **Click the <u>Install Now</u> link to begin the installation process.**

   You could instead use the <u>Download</u> link to download the desktop components installer if you want to install them later.

4. **Click OK if you see the Document Manager Plug-In dialog box.**

   The IBM Workplace Document Manager Desktop Components InstallShield dialog box appears.

   If you don't see the Document Manager Plug-In dialog box, the InstallShield dialog box appears on its own.

5. **Click Next.**

   The License Agreement dialog box appears.

6. **Read every last word of the license (there will be a quiz later) and, if you agree, click the I Accept the Terms in the License Agreement radio button. Then click Next.**

   The Destination Folder dialog box appears. By default, WSE installs the desktop component software in the directory shown. Use the browse button if you need to change the location.

7. **Click Next.**

   The Ready to Install the Program dialog box appears.

8. **Click the Install button.**

   WSE installs the software; this step usually takes about two minutes. When finished, the InstallShield Wizard Completed dialog box appears.

9. **Click the Finish button to exit the installation program and load the desktop component software.**

Configuring the Desktop Component Software

Figure B-2 shows the Desktop Components Setup dialog box, which is used to configure the desktop component software to connect with your WSE server.
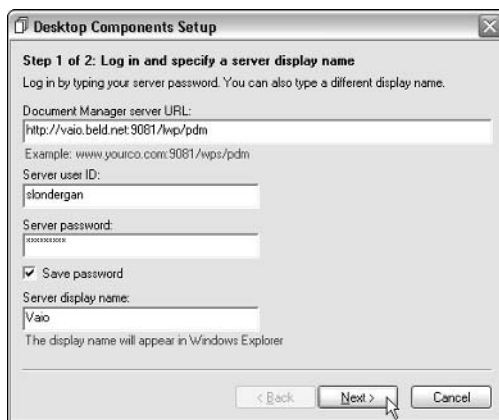
Before you can use the desktop components, you must configure them. To access the Desktop Components Setup dialog box, open My Computer and double-click the Document Manager option. In the new window that appears, choose File⇨Add Server.

The Desktop Components Setup dialog box has several fields, all of which (except Save Password) are required:

- ✔ **Document Manager Server URL:** Add the URL that the desktop component software will use to access your WSE server.

- ✔ **Server User ID:** Enter your user ID, the same one you use when you log in to WSE with your browser.

- ✔ **Server Password:** Enter your password, the same one you use when you log in to WSE with your browser.

- ✔ **Save Password:** Click this check box if you don't want to get asked for your password every time you start the desktop component software.

- ✔ **Server Display Name:** Enter the name by which you want the server to be listed in Windows Explorer.

- ✔ **Local Directory:** This field determines where WSE will store the local, temporary files you work on. You usually do not need to change this field's default value, so don't change the info here unless you have a good reason.

When you're done with this part of the Desktop Components Setup dialog box, click Next. The Step 2 dialog box appears, as shown in Figure B-3.

TIP

Don't get put off by the fields in the Desktop Components Setup dialog box; enter the same URL and username that you've been using all along. Give your WSE administrator a call if you do get thwarted.
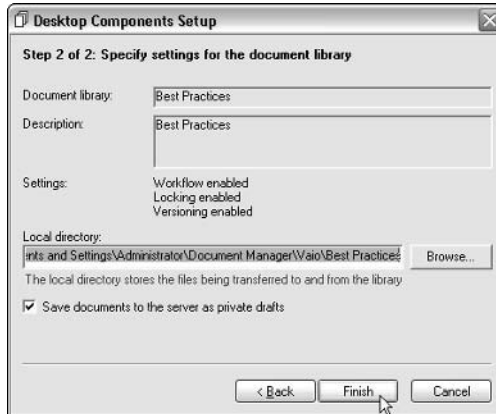
Figure B-3: Configuring the desktop components.

Desktop Components Setup

Step 2 of 2: Specify settings for the document library

Document library:	Best Practices
Description:	Best Practices
Settings:	Workflow enabled Locking enabled Versioning enabled

Local directory:

ints and Settings\Administrator\Document Manager\Vaio\Best Practices   [Browse...]

The local directory stores the files being transferred to and from the library

☑ Save documents to the server as private drafts

[< Back] [Finish] [Cancel]

TIP

You have to decide whether to click the Save Documents to the Server as Private Drafts check box. If you don't want documents you edit with the desktop components software to be immediately published or submitted for approval, then click the check box. If you do, leave it alone.

When you're done with the Step 2 dialog box, click Finish. A Windows Explorer window opens, showing the folders and documents in the WSE document library intermingled with the folders and documents on your local hard drive.

Although this window is connected to your WSE document library, you can use it as you would any other Windows Explorer window — for example, you can click the column heading to sort the window's contents, change from a detail view to a large icon view, and so on. You will also find a new Document Manager icon listed under My Computer.

Using the Document Manager Icons

Here's a list of the special Document Manager icons you're likely to see in Windows Explorer:

✔ **Document Manager:** The gateway to the WSE document libraries.

✔ **WSE Server:** This icon appears next to the name of the servers when you open the Document Manager.

✔ **Document Library:** You see this icon when you open a WSE server; it appears next to each document library you can use.

✔ **Folder:** The name says it all.

✔ **Document:** A document that's in the document library.

✔ **View Pending Drafts:** Click this icon to see the documents in the library that are pending your review.

✔ **Draft:** This icon appears next to a document that is not yet published.

✔ **Pending Approval:** This icon appears next to a document in a workflow-enabled library, which is not yet approved.

✔ **Locked Documents:** Click this icon to see the documents in the library that are locked.

✔ **Locked Document:** This icon appears next to a document that can't be edited.

✔ **Upload Failure:** This icon identifies a document that the desktop component software could not upload to the WSE server for some reason. (Did you kick out that Ethernet cable?)

Using the Desktop Components to Interact with a WSE Document Library

If you know how to use Microsoft Windows, you know how to interact with a document library; you just treat it almost like another drive or folder on your computer.

For example, to copy a file from your local file system into the document library, simply click the Document Manager icon, navigate to the document library's folder, and then drag and drop the file from your computer into that folder. When you drop a file into a Document Manager folder, you are really uploading the document into the document library; when the copy finishes uploading, for example, anyone who visits the document library with their browser can see and use the document as they would any other.

To delete a file, right-click on the file and select Delete from the mouse's pop-up menu. Same (or similar) deal if you want to create a new document or folder, and so on.

REMEMBER

These processes work just the same way that any other Windows folder does —
with one exception: You can't use the desktop components to create a new
document library.

Using a new document library

When you use WSE for the first time, it is configured to point at the document
library you used to download the desktop component software. Use the fol-
lowing steps to add an additional document library:

1. **Open the Document Manager.**

   The list of WSE servers you can use appears.

2. **Open the WSE server.**

   Double-click it.

   The list of document libraries you are already connected to appears.

3. **Right-click in the Document Manager window and select Add Library
   from the pop-up menu.**

   The Add Document Library dialog box, which lists all of the document
   libraries that are available on the WSE server, appears.

4. **Select the document library you want to add and click Next.**

5. **Use the Local Directory field to determine where WSE will store the
   local temporary files for this document library.**

   Usually you do not need to change this field's default value.

6. **Click the Save Documents to the Server as Private Drafts check box if
   you don't want the documents you edit when using the desktop compo-
   nents software to be immediately published or submitted for approval.**

7. **Click Finish.**

   A Windows Explorer window opens, showing the folders and documents
   in the document library you added.

Editing documents

When you edit documents with the desktop components (open such a file
by either double-clicking it in the Desktop Component window or by using
Microsoft Office to open the document from the library directly), the desktop
components software downloads the file you choose into the directory you

selected when you added the library. When you save the file, the desktop component software takes care of uploading the file back into the document library.

Using the desktop components with Microsoft Office

WSE has a special relationship with Microsoft Office, so it's no surprise that the desktop components software does, too.

When you install the desktop components, and you have Microsoft Office, a special addition is made to Office's File menu, in order to make it easy to use Microsoft Office with your document library.

For example, Figure B-4 shows what it looks like when you open a Microsoft Word document from a WSE document library.
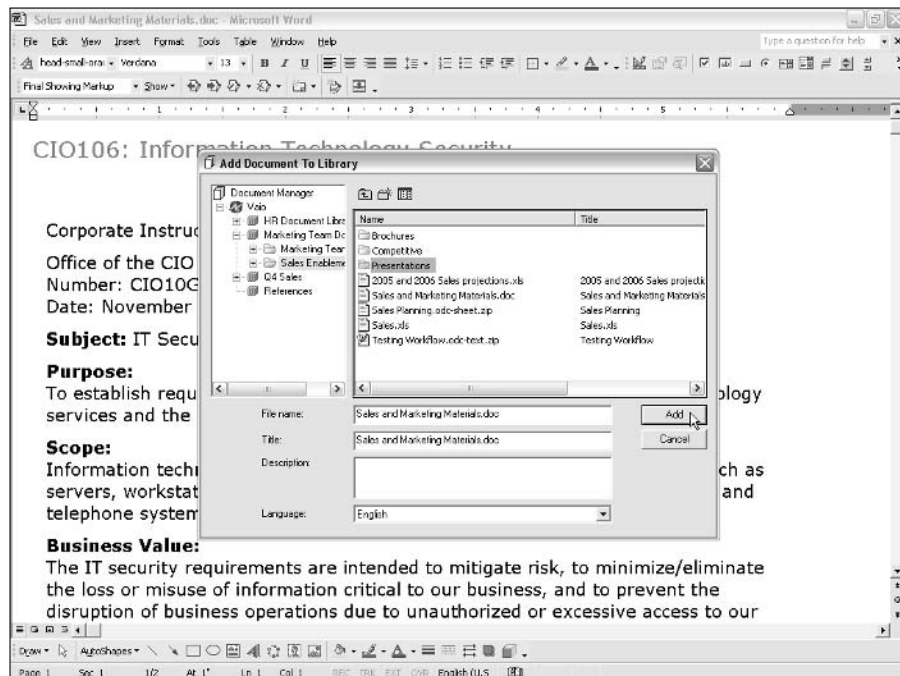
Figure B-4:
Using
Microsoft
Office with a
document
library.

When you use Office to work with a document library, choose File⇨ Document Manager to interact with your libraries on the WSE server. You have seven choices:

- ✔ **Open from Library:** This option lets you open and edit a document from a WSE document library. When you save the document, it is automatically saved in the WSE document library.

- ✔ **Add to Library:** Similar to Save As, this option takes whatever document you have open in Office and saves it in a document library.

- ✔ **Lock:** After you select a document in a library, use this option to prevent anyone from making changes to a document.

- ✔ **Unlock:** After you select a document in a library, use this choice to allow someone on the team to make changes.

- ✔ **Submit Draft:** When you have opened a document from a document library that has workflow turned on, use this choice to submit a document for approval.

- ✔ **Delete Draft:** This option removes the selected document.

- ✔ **Properties:** This option displays information about the selected document.

These WSE options should sound familiar; they mimic the buttons you have available when you are working with a document library via your browser.

Using the Desktop Components with Other Windows Applications

Although the desktop components sport such tight integration with Office, you can use them with any Windows application. If you use Lotus 1-2-3, for example, and want to edit a spreadsheet from a document library, choose File⇨Open in Lotus 1-2-3 and navigate to My Computer⇨ Document Manager⇨ your WSE server⇨your document library, and so on until you find the file you wanted to edit. Figure B-5 shows that any Windows program can be used to work with the files in a document library.

Figure B-5:
The desktop components let you use a document library with any Windows application.
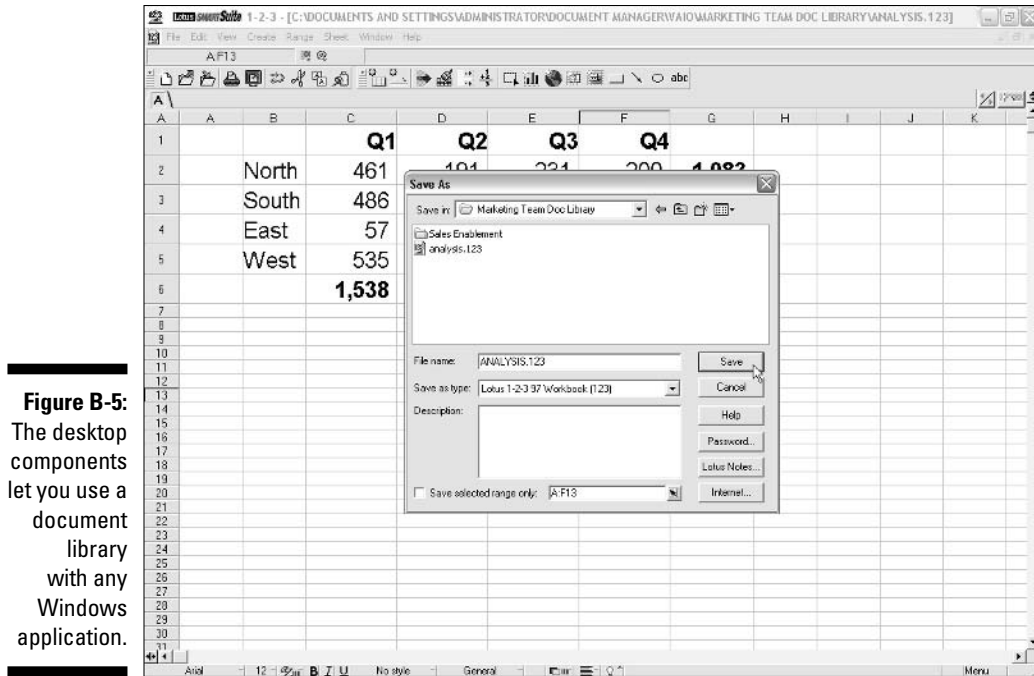
Appendix C

Using the Domino Application Portlet

● ●

In This Appendix

▶ Using the Domino Application Portlet

▶ Configuring the portlet to access a Domino application

● ●

*T*he Domino Application portlet is special. It provides an easy way to com-
bine your WSE portal with Domino applications. If you have a Domino
server, and Domino applications on the server, use this portlet to make those
applications work with WSE. What makes the portlet so special? Well, it's free
and included with WSE.

If you can't find a copy, or want to make sure you have the latest and greatest,
search for *domino application portlet* at the IBM Workplace Solutions catalog.

The other thing that makes the portlet special is how easy it is to use. You
just drop this baby on a WSE page, tell it which Domino server and database
to use, and you're off to the races.

Adding the Portlet to the Portlet Palette

Although the Domino Application portlet is included with WSE, it usually isn't
included in the Portlet Palette, until you add it. Use the following steps to add
the Domino Application portlet to the Portlet Palette:

  1. **Open the Portlet Palette.**

     The list of available portlets is displayed.

2. **Click the <u>Add</u> link at the bottom of the list.**

   The Add Item To Category Portlets form appears.

3. **Enter** domino application **in the Title Contains field and click the Search button.**

   The Domino Application portlet appears.

4. **Click in the check box next to the Domino Application portlet to select it and click OK.**

   The Domino Application portlet is added to the list of available portlets in the Portlet Palette.

Using the Domino Application Portlet in IBM Workplace Services Express

Add the Domino Application portlet to a WSE page the way you would add any other portlet; open the Portlet Palette and drag the Domino Application portlet onto the page.

Figure C-1 shows the newly added, but not yet configured, Domino Application portlet.
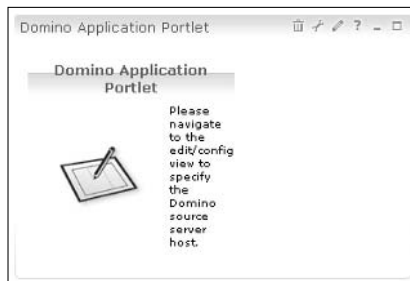
Figure C-1: The Domino Application portlet.

Click the portlet's Edit button (which looks like pencil) and use the Domino Application Portlet form, shown in Figure C-2, to configure it.

Figure C-2:
Tell the
Domino
Application
portlet how
to talk to
your
Domino
server.

The form has ten fields:

- ✔ **Username:** If the Access Control List (ACL) of the Domino database requires authentication, enter the name the portlet should use to log in to WSE in this field.

- ✔ **Password:** If the ACL of the Domino database requires authentication, enter the password the portlet will use to log in to WSE in this field.

- ✔ **Protocol:** The protocol that the Domino server uses for Web connections — either HTTP or HTTPS.

- ✔ **Host:** The name of the server that holds the Domino database.

- ✔ **Port:** The port number used for access to the Domino server.

- ✔ **Path and Filename:** The path and filename of the Domino database.

- ✔ **Width:** This field sets the width for the frame the portlet will use. The default value is 100 percent; you probably don't need to change this value.

✔ **Height:** How tall the portlet will be, in pixels. The default setting is 500 pixels, and you probably don't need to change this value.

✔ **Border:** The number of pixels for the portlets border; enter 0 if you don't need a border.

✔ **Portlet Title:** Text that goes at the top of the portlet. If you don't change this field, the title remains Domino Application Portlet.

REMEMBER

The Authentication Model, Credential Vault Setting, and System Slot Identifier fields are used in certain portal configuration settings. You need to contact your system administrator if you have reason to believe that these fields are for you, because they probably aren't. Otherwise, leave them alone.

Click the Save button and then click the Close button when you're finished.

Figure C-3 shows a sample Domino application in WSE.

Figure C-3: Using a Domino application in WSE is easy.

Appendix D

Document Types that IBM Workplace Services Express Supports

In This Appendix

▶ Finding out which file types WSE supports

*T*able D-1 lists all the document formats that WSE supports.

Table D-1	Files That Can Be Rendered by WSE as Web Pages
File Extension	*Application*
`.acm`	Microsoft Access
`.ami`	Ami Pro, Ami, Professional Write Plus
`.bdr`	Microsoft Office Binder
`.bmp`	Bitmap
`.cal` and `.cals`	CALS Raster
`.cgm`	Computer Graphics Metafile
`.dbs`	dBase
`.dez`	DataEase
`.dif`	Navy DIF
`.doc`	Microsoft Word
`.drw`	Micrografx
`.dx`	DEC DX

(continued)

Table D-1 *(continued)*

File Extension	Application
`.dxf`	AutoCad Interchange
`.emf`	Enhanced Windows Metafile
`.en4`	Enable Word Processor
`.ens` and `.enw`	Enable Spreadsheet
`.eshr`	Escher internal Microsoft Office graphics format
`.exe`	Executable
`.fax`	CCITT Group 3 Fax
`.fcd` and `.fcs`	First Choice DB
`.fft`	IBM DCA/FFT
`.flw`	Lotus Freelance
`.fpx`	Kodak Flash Pix
`.fwk`	Framework III
`.gdsf`	Interface for *.FLT filters
`.gif`	CompuServe GIF
`.gzip`	UNIX GZip
`.hgs`	Harvard Graphics
`.html` and `.htm`	HyperText Markup Language (up to 3.0 with some limitations)
`.ich` and `.ich6`	Ichitaro
`.img`	GEM Image
`.iwp`	Wang IWP
`.jpg, .jpeg*, .jif,` and `.jfif`	JPEG image
`.Jw`	JustWrite, Q&A Write
`.leg`	Legacy, Wordstar for Windows
`.lwp, .lwp7`	Lotus WordPro

File Extension	Application
`.lzh`	LZH Compress
`.m11`	Mass 11
`.manu`	Lotus Manuscript
`.mcw`	MacWrite
`.mif`	FrameMaker
`.mm, .mm4, and .mmfn`	MultiMate
`.mp`	Multiplan
`.mpp`	Microsoft Project
`.msg`	Microsoft Outlook
`.msw`	Microsoft Word, Windows Write
`.mwkd and .mwks`	Mac Works
`.mwp2 and .mwpf`	WordPerfect
`.mwrk`	Mac Works
`.odc-present.zip`	WSE's Productivity Components Presentation
`.odc-sheet.zip`	WSE's Productivity Components Spreadsheet
`.odc-text.zip`	WSE's Productivity Components Rich Text
`.ope`	Presentation Editor
`.ort`	Rich Text Editor
`.oss`	Spreadsheet Editor
`.ow`	OfficeWriter
`.pbm`	Portable Bitmap
`.pcd`	Kodak Photo CD
`.pcl`	PC File
`.pcx`	Paintbrush
`.pdf`	Adobe PDF and Adobe Illustrator

(continued)

Table D-1 *(continued)*

File Extension	Application
`.pdx`	Paradox
`.pfx`	PFS: Write, Professional Write, IBM Writing Assistant, First Choice word processor
`.pgl`	HP Graphics Language
`.pic`	Lotus PIC
`.pict`	Macintosh PICT
`.png`	Portable Network Graphics
`.pntg`	MacPaint
`.ppl`	PFS: Plan
`.ppt`, `.pp97`, `.pp7`, and `.pp2`	Microsoft PowerPoint
`.psp6`	Paint Shop Pro
`.qa` and `.qad`	Q&A Write. Database
`.qp6` and `.qp9`	Quattro Pro
`.ras`	Sun Raster
`.rbs`	R:Base
`.rft`	IBM DCA/RFT
`.rfx`	Reflex
`.rtf`	Rich Text Format
`.sam`	Samna
`.sc5`	SuperCalc
`.sdw`	Ami Draw
`.shw3`	Novell Presentations, Corel Presentations
`.smd` and `.sms`	Smart DataBase, Spreadsheet
`.smt`	SmartWare
`.snap`	Lotus Snapshot
`.soc`, `.soi`, and `.sow`	StarOffice Calc
`.spt`	Sprint

File Extension	*Application*
`.taz`	UNIX compress, UNIX tar
`.text`	Text
`.tga`	Targa
`.tif6`	Tagged Image File Format
`.tw`	Total Word
`.txt`	IBM DisplayWrite
`.vcrd`	vCard
`.viso`	Visio
`.vw3`	Volkswriter
`.doc`, `.word`, `.w6`, and `.w97`	Microsoft Word
`.wbmp`	WBMP wireless graphics format
`.wg2`, `.wk4`, `.wk6`, and `.wks`	Lotus 123
`.wm`	WordMarc
`.wmf`	Windows Metafile
`.wml`	Wireless Markup Language
`.work`	Microsoft Works
`.wp5`, `.wp6`, `.wpf`, `.wpg`, and `.wpg2`	WordPerfect 5.x
`.wpl`	Dec WPS Plus
`.wpw`	Novell PerfectWorks
`.ws`, `.ws2`	Wordstar
`.x11`	X-Windows dump
`.xbm`	X-Windows bitmap
`.xls`, `.x15`	Microsoft Excel
`.xpm`	X-Windows Pixmap
`.xy`	XyWrite / Nota Bene, Signature
`.zip`	PKZIP

Appendix E

Installing IBM Workplace Services Express

. . . .

In This Appendix

▶ Getting WSE installed and running

▶ Playing with the WSE server

. . . .

*T*his appendix contains an overview of the installation process for IBM Workplace Services Express 2.5. It's been said that WSE installs in under an hour, and although that may not be the most enjoyable way to spend an hour, it could be a lot worse; some products that combine collaboration, document management, instant messaging, and a portal could literally take days to build and configure.

The steps in this appendix describe how you can install the simplest WSE configuration by using the Workplace Services Express Installation Wizard. In this example, all of WSE will be running on the same server.

If you are planning to use WSE for a large or complex team, or if you anticipate that you'll need room for a lot of team spaces, it behooves you to consider using two or more servers, divvying up the responsibility for the collaboration, database, authentication, instant messaging, and portal functions between them.

TECHNICAL STUFF

Details about installing and configuring such a WSE system are described in the documentation for WSE, available online at IBM's Web site. Visit `http://publib.boulder.ibm.com/infocenter/wseic/v2r5/index.jsp?topic=/com.ibm.wse.doc/wpf/cust_ovr.html`.

Installing WSE

Of course, the first step in installing WSE is to get your hot little hands on the software. After you do that, you can either run the installation program and wizards directly from the WSE DVD, or you can copy the WSE DVD's contents onto the hard drive of the computer onto which you're installing WSE.

In either case, you need to switch to the directory that contains the installation files, which is usually named `WSEserver`. For example, switch to perhaps `D:\WSEserver` (if `D:` is your server's DVD drive, or whichever drive is appropriate for your system). Then follow these steps:

1. **If you're installing WSE on a Windows server, run the** `install.bat` **batch file that's in the** `WSEserver` **directory.**

   If installing on Linux, run `/install.sh`.

   You must be logged in as a root user to install WSE on a Linux server.

2. **Select the language for the installation, and then click OK.**

3. **Click Next on the Welcome panel.**

4. **Select I Accept the Terms in the License Agreement and click Next.**

5. **Enter the name of the directory in which you want to install WSE in the Directory field, or use the Browse button to select the directory and click the Next button.**

   You can install WSE in any directory you want, as long as you remember where you put it.

6. **Enter the WSE server's host name in the Hostname field (shown in Figure E-1) and click the Next button.**

   The Password dialog box appears.

Figure E-1: Enter the new WSE server's host name.
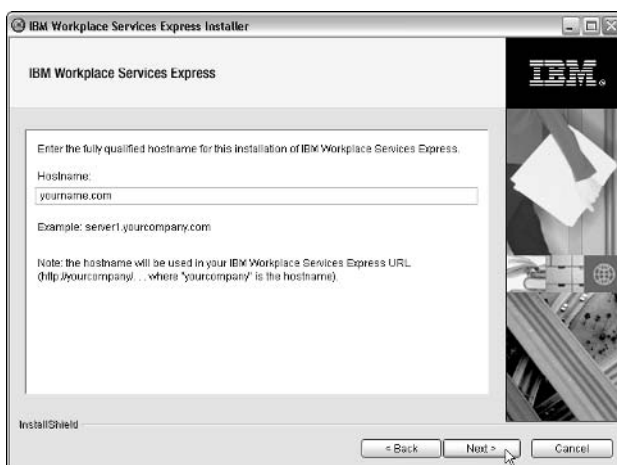
7. **Choose an Administrator ID and password, and enter them in the Administrator User ID, Password, and Confirm password fields and click the Next button.**

8. **Make sure that you're cool with everything shown in the Confirmation dialog box. If you notice a mistake, use the Back button to go back and fix the error. If everything looks okay, click the Next button.**

9. **Go get a cup of coffee.**

   I'm not even kidding. It'll take WSE a good 20 or 30 minutes to copy all the files, unpack them, put them where they belong, and generally get everything nice and tidy. There's no reason for you to sit there while WSE grinds away. Trust me, there's nothing to see.

   Finally, the Congratulations dialog box appears.

10. **Click the Start IBM Workplace Services Express check box and then click the Next button.**

11. **Time for more coffee.**

   Starting WSE for the first time is going to take awhile, too. Not as long as Step 9 did, but you *definitely* have time to get a refill on that cup of joe.

   The IBM Workplace Services Started Successfully dialog box appears.

12. **Select the Launch First Steps check box and click the Next button.**

   What happens next definitely, as they say, *depends.* The WSE Installation Wizard starts your Web browser and opens your WSE server's home page. At this stage of the game, it's likely that the only user ID that's been set up is the one you entered in Step 7, so you can either log in with that user ID and password or register (see Chapter 2) to give yourself a real user ID and password.

If you plan to configure WSE to use an existing directory (LDAP or Active Directory) rather than its own built-on directory, now's the time to do that. Similarly, if you plan to use a different database than the one WSE installs by default, do that before building a ton of team spaces. Information on these and other installation-related tasks are made available by IBM on the WSE Infocenter, which is on IBM's Web site at `http://publib.boulder.ibm.com/infocenter/wseic/v2r5/index.jsp?topic=/com.ibm.wse.doc/wpf/cust_ovr.html`.

Starting the WSE Server

Although the WSE Installation Wizard starts the WSE server automatically, sometimes you need to do the same thing, manually. The server has to be up and running before any of your team members can access it. Use these steps to start WSE, manually:

1. **Get thee to a command prompt.**

2. **Switch to the directory where you installed WSE (as you promised to remember back in installation Step 5).**

3. **Switch to the directory named** `PortalServer\rootscripts`**, which is inside the directory you found in Step 2.**

   For example, the directory might be `C:\Program Files\IBM\WorkplaceServicesExpress\PortalServer\rootscripts\subtasks`.

4. **Enter one of the following commands:**

   • If you use Windows, type **startWorkplaceServices.bat**.

   • If you use Linux, type **./startWorkplaceServices.sh**.

   Watch for a message in the command prompt window that states that the server has started successfully.

> **TIP**
>
> When you install WSE on Windows, it is automatically configured for you as a Windows service.

Stopping the WSE Server Manually

Use these steps to stop WSE manually:

1. **Get thee to a command prompt.**

2. **Switch to the directory where you installed WSE (as you promised to remember back in installation Step 5).**

3. **Switch to the directory named** `PortalServer\rootscripts`**, which is inside the directory you found in the previous step.**

   For example, the directory might be `C:\Program Files\IBM\WorkplaceServicesExpress\PortalServer\rootscripts\subtasks`.

4. **Enter one of the following commands:**

   • If you use Windows, type **stopWorkplaceServices.bat**.

   • If you use Linux, type **./stopWorkplaceServices.sh**.

5. **Watch for a message that states that the server has shut down.**

> **TIP**
>
> You can start and stop the server without using the command prompt. Simply traverse to the same `C:\Program Files\IBM\WorkplaceServicesExpress\PortalServer\rootscripts\subtasks` folder using Windows Explorer, find the appropriate `.bat` or `.sh` file, and double-click it. A command prompt window opens. After the server completes its latest process, it shuts down.

Appendix F

Fun with Formulas and Functions

*T*he simplest formulas use cell references; for example, a simple formula in cell C1 might be =A1+B1.

REMEMBER

WSE formulas always begin with an equal (=) sign.

WSE also includes a series of built-in functions to make it easier to perform common applications. This appendix gives you the low-down.

Financial Functions

fv(r, nper, pay): Returns the future value of a series of payments, at a specific interest rate, where *r* is a cell containing the interest rate, *nper* is the total number of compounding periods for the loan, and *pay* is the payment amount.

ipmt(r, per, nper, pv): Returns the interest portion of a payment for a specified period, where *r* is the interest rate, *per* is the number of the period of interest, *nper* is the total number of compounding periods, and *pv* represents the value of the series of payments, today.

nper(r, pay, pv): Generates the number of periods required to pay off a loan, *pv,* based on constant periodic payments and a constant interest rate.

npv(r, pay1, pay2, . . .): Returns the net present value of a series of payments, where *r* is the interest rate per period, and *pay1. . . payn* are the payment amounts.

pmt(r, nper, pv): Returns the payment amount for a loan of amount *pv,* where *r* is the interest rate, *nper* is the total number of compounding periods, and *pv* is the loan amount.

pv(r, nper, pay): Returns the present value of a series of payments, where *r* is the interest rate, *nper* is the number of compounding periods, and *pay* is the amount paid each period (normally negative).

Math Functions

abs(number): Returns the absolute value of the number.

acos(number): Returns the arc cosine of a value (angle returned in radians).

asin(number): Returns the arc sine of a value.

atan(number): Returns the arc tangent of a value.

atan2(x-coord, y-coord): Returns the arc tangent of the angle.

average(number1, number2, . . .): Calculates the average of all numbers.

ceiling(number, round): Rounds a number up to the nearest multiple of round.

cos(angle): Returns the cosine of an angle.

degrees(radians): Converts an angle from radians to degrees.

e( ): Returns the constant, *e*.

exp(exponent): Raises the constant, *e,* to the specified exponent.

floor(number, round): Rounds the value down to the nearest multiple of round.

int(number): Returns the integer.

ln(number): Takes the natural logarithm of number.

log10(number): Takes the logarithm (base 10) of number.

max(number1, number2, . . .): Compares and returns the maximum value.

median(number1, number2, . . .): Returns the middle value of a set of numbers.

min(number1, number2, . . .): Returns the minimum value.

mod(number, divisor): Returns the remainder of number/divisor.

pi( ): Returns the constant, *pi,* up to 16 decimal places.

power(number, exponent): Raises the number to the specified exponent.

product(number1, number2, . . .): Multiplies all the arguments.

radians(degrees): Converts an angle from degrees to radians.

rand(number1, number2): Returns a random number; both arguments are optional, so if you include just *number1* you get a random number between 0 and *number1;* if you also include *number2* you get a number between *number1* and *number2*.

round(number, places): Rounds the value up or down to the specified number of decimal places.

sign(number): Returns 1 if the number is positive, -1 if the number is zero or negative.

sin(angle): Returns the sine of an angle (in radians).

sqrt(number): Returns the square root of a number.

sum(range): Adds the values of the listed cells and ranges.

tan(angle): Returns the tangent of an angle.

trunc(number): Truncates a number to an integer.

Text Functions

concatenate(string1, string2, . . .): Joins the strings supplied as arguments.

left(string, length): Returns a substring from the beginning; the length determines how many characters are included.

right(string, length): Returns a substring from the end; the length determines how many characters are included.

Date Functions

date(year, month, day): Returns the serial number for a specified date, which you typically then use the format menu to display as a date.

datevalue(datestring): Returns the serial number for a date string that displays the serial number where *datestring* is in the format *month/day/year*.

day(number): Returns the day of the month corresponding to the supplied number.

hour(number): Returns the hour corresponding to the supplied number.

minute(number): Returns the minute corresponding to the supplied serial number.

month(number): Returns the month of the year corresponding to the supplied serial number.

now( ): Returns the serial number for the current date and time. (Use *today()* if you just want the date.)

second(number): Returns the second corresponding to the supplied serial number.

time(hour, minute, second): Returns the serial number for a specified date.

timevalue(timestring): Returns the serial number for a specified time, where *timestring* is in the format *hour:minute:second*.

today( ): Returns the serial number for the date.

weekday(number) or **weekday(datestring):** Returns the day of the week ranging from 1 (Sunday) to 7.

year(serialnumber/datestring): Returns the four-digit year.

Lookup Functions

hlookup(val, range, row): Looks up a value within a horizontal range and returns a cell value from the column in which the looked-up value was found.

large(val1, val2, . . . , n): Given a set of numbers or cells, returns the *nth* largest.

select(index, val1, val2, . . .): Selects the value number index from a set of values or a range.

small(val1, val2, . . . , n): Given a set of numbers or cell range, returns the *nth* smallest.

vlookup(val, range, col): Looks up a value within a vertical range of cells and returns a cell value from the row in which the looked-up value was found.

Web Functions

hyperlink(url, text): Creates a hyperlink to URL from the text displayed within a cell. If text is omitted, the URL name is displayed.

image("url"): Displays a Web-hosted image within a spreadsheet cell, where *"url"* (enclosed in quotes) is the URL where the image is located.

Logical and Information Functions

and(arg1, arg2, . . .): Returns 1 if all arguments are true.

err(ET, ED): Returns an error object where *ET* is a string containing a short error label and *ED* is a string containing a more descriptive error message.

false( ): Returns 0.

if(test, trueval, falseval): Returns *trueval* if the test returns true, *falseval* if the test returns false.

isblank(cell): Returns true (the value 1) if the cell is blank; otherwise, returns 0.

iserror(cell): Returns 1 if the cell contains an error value; otherwise, returns 0.

isstring(cell): Returns 1 if the cell contains a string value; otherwise, returns 0.

isvalue(cell): Returns 1 if the cell contains a numeric value; otherwise, returns 0.

not(logical)L: Returns false (the value 0) if true; true (the value 1) if false.

or(arg1, arg2, . . .): Returns 1 if any or all of the arguments are true.

true( ): Returns 1.

xor(arg1, arg2, . . .): Returns true (the value 1) if only one of the arguments is true.

User Interface Functions

button(button_name, macro_to_run, optional_macro_function_argument_0 [, . . ., optional_macro_function_argument_N]): Creates a button inside a cell that, when clicked, executes a specified macro.

menu(key1, value1, key2, value2, . . .): Builds a pop-up menu within a cell, where *key* is the text to be displayed in the menu and *value* is the value seen by other cells and used in calculations when *key* is chosen.

Index