

# 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 databases 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.



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.



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`.

