

IBM® Workplace™ Services Express

FOR
DUMMIES®

by Stephen R. Londergan

Author of Lotus Notes 6 For Dummies

Foreword by Michael Loria

Director, Worldwide Channels and Product Marketing
IBM Software



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IBM® Workplace™ Services Express

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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.

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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.

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Foreword

The 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

IBM Software

Introduction

First 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

In This Chapter

- ▶ Understanding collaboration and portal software
 - ▶ Introducing IBM Workplace Services Express
 - ▶ Getting more productive with IBM Workplace Services Express
-

IBM 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.

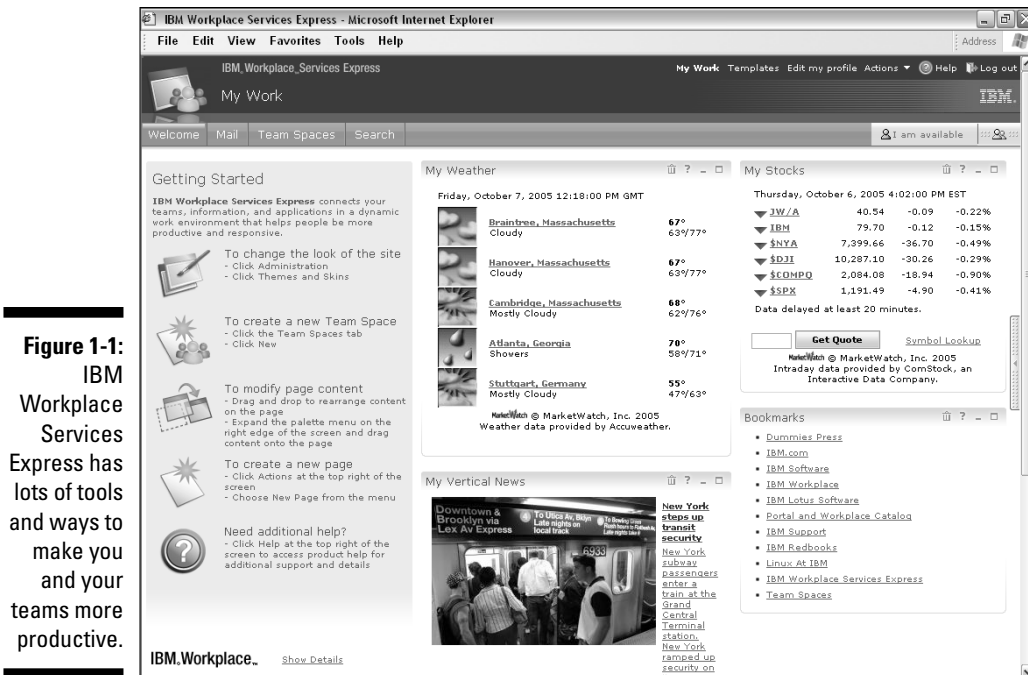


Figure 1-1:
IBM Workplace Services Express has lots of tools and ways to make you and your teams more productive.

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.