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# Using QuickPlace 3.0 on the IBM iSeries Server

**DL15** 

#### ITSO iSeries Technical Forum 2003

**Debbie Landon** 





### Notes: Using QuickPlace 3.0 on the iSeries server



The focus of this presentation is to introduce you to QuickPlace and provide some tips and techniques for deploying and administering QuickPlace 3.0 on a Domino for iSeries server.

This presentation was developed in the ITSO Rochester Center in November 2002. Many thanks to the following people for creating this presentation:

- Wendy Thomson, Enlighten Computer Services, Australia
- Wilfried Blankertz, IBM Enterprise Systems Group iSeries Technical Support, Germany

What is QuickPlace?

Installing and Using QuickPlace on the iSeries Server

**New Features in QuickPlace 3.0** 

**Summary** 

# Notes: Agenda



Here is the agenda for our presentation.



# What is IBM Lotus QuickPlace?

# **Notes:** What is IBM Lotus QuickPlace?



In this first section of the presentation we introduce you to QuickPlace and describe what it is as well as some of the basic components that that are included in a QuickPlace.

### What is QuickPlace? 1 of 2



#### **Instant Team Workspaces for the Web**

- Web-based collaborative team workspace
- Self-service application
- Enables instant user-based creation of a secure workspace on the Web
- Add team collaboration to a broad range of Web applications
  - -Lotus Notes 6 and Notes R5, Lotus Sametime, and Microsoft Office

#### Find information faster

- Search across all of a person's workspaces (Places) or a single Place
- Automatically track and present all the Places to which a person belongs
- Users can take information off-line using Domino Off-Line Services (DOLS)

#### **Use familiar tools**

Schedule meetings that automatically appear in Notes or Outlook calendars

#### Notes: What is QuickPlace? 1 of 2



IBM Lotus QuickPlace is the Web-based solution for creating team workspaces for collaboration. With QuickPlace, companies give users a way to securely work with colleagues, suppliers, partners and customers. QuickPlace provides teams with workspaces where they can reach consensus through discussions, collaborate on documents and coordinate plans, tasks and resources.

#### **Instant Team Workspaces for the Web**

IBM Lotus QuickPlace is a Web-based collaborative team workspace. QuickPlace integrates with existing applications, such as Lotus Notes 6 and Notes R5, Lotus Sametime and Microsoft Office to help users schedule meetings, manage tasks, communicate in real-time, present ideas and create and edit documents using familiar tools. QuickPlace is a self-service application so once administrators install QuickPlace on the iSeries server and add it to a Domino server, users can take responsibility for creating a new team workspace and managing users for that workspace.

#### Find information faster

QuickPlace's design allows team members to find information quickly by giving them the ability to search across all of the workspaces (or what is now called Places) they have membership in as well as within a single Place. You can quickly locate and enter team workspaces through "My Places", a new feature which automatically tracks and presents all the Places to which an individual belongs. Unlike most Web applications, team members can also bring information with them offline when they disconnect from the network using Domino Off-Line Services or DOLS.

#### Use familiar tools

You can also schedule meetings more effectively using QuickPlace 3.0's team calendar. Make a reservation for Sametime Web conferencing events and have them automatically appear in peoples' individual Lotus Notes R5, Notes 6, or Microsoft Outlook calendars. Create, publish, and share content using round-trip editing with Microsoft Office tools.

### What is QuickPlace? 2 of 2



#### **Customization capabilities**

- Customize the look and features to fit specific requirements
- Changes to multiple QuickPlaces can be propagated simultaneously
- Integrate into a Web portal using QuickPlace Java/XML API

#### Add awareness

- Work more efficiently in real time using Sametime.
- Schedule and attend Web conferences within QuickPlace Group Calendar

#### Retain collective knowledge

Keep information organized in a single spot



#### Notes: What is QuickPlace? 2 of 2



#### **Customization capabilities**

QuickPlace has the customization capabilities that allow companies to maximize their investment in Web applications. Web designers and developers can customize the look and features of QuickPlace to fit either horizontal or an industry segment's specific requirements. Changes to the look and functions of multiple QuickPlaces can be propagated simultaneously through centralized administration and template designs. A QuickPlace can also be integrated in a Web portal using the QuickPlace Java/XML API.

#### Add awareness

Work more efficiently in real time by tapping into IBM Lotus Sametime. See if a document author is online and ask questions through instant messaging or schedule and attend Web conferences directly from within the QuickPlace Group Calendar.

#### Retain collective knowledge

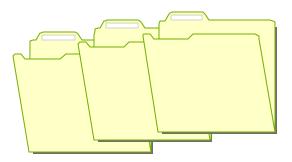
Keep information organized in a single spot. Team members switch teams, people forget how they reach decisions. QuickPlace keeps information where new team members can access and review it.

# Main Components of a QuickPlace - User





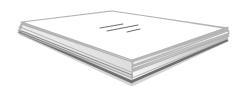
**Places** 



**Folders** 



Rooms



Pages

# Notes: Main Components of a QuickPlace - User



The main components of a QuickPlace from a user perspective consists of places, rooms, folders, and pages. We describe each of these in more detail on the next four slides.

### What is a Place?



- Virtual collaborative workspace
- Create your own Places
- QuickPlace can have many Places
- Each Place maybe a separate project





#### **Notes:** What is a Place?



A Place is a virtual collaborative workspace, created on a QuickPlace Domino server, that is composed of a collection of Domino databases.

The name assigned to a Place must be unique among all Places on the QuickPlace Domino server as well as those within the entire QuickPlace service. When a user creates a Place, QuickPlace first verifies that the QuickPlace Domino server's data directory does not already include a subdirectory with this Place name. To ensure that a place name is unique across the entire service, QuickPlace automatically registers each new Place in the Place Catalog for the service.

A Place manager can create rooms or folders within a Place, create online meetings, enable or disable mail for the Place, specify the room where mail is delivered, and otherwise customize the Place. The Place manager controls membership for the Place and designates each member as a Reader, Author, or Manager of the Place.

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### What is a Room?



- Each Place may have many Rooms
- Each Room can be used to reduce the clutter in the main Place
- Different groups of team members could use different Rooms



### **Notes:** What is a Room?

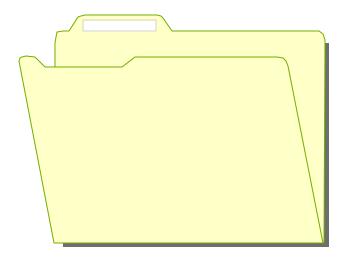


A Place manager can create rooms to expand a Place and create private areas for smaller teams to work in. Rooms can contain pages, folders, and other rooms. Access to a room can be restricted to a subset of group members who need to work together privately.

### What is a Folder?



- Used to help organize the content of a Place
- Used for storing pages related to a particular topic
- Appears in the table of contents of a Place or Room
- Have their own security
- Anyone with Author access to a Place or Room can create pages in a folder
- Who ever creates the folder can limit Author access to Managers only



#### **Notes:** What is a Folder?



Folders help organize the content of a Place.

Members can create folders for storing pages related to a particular topic.

Folders appear in the table of contents of a Place or Room and have their own security. The member who creates the folder can limit author access to managers only. By default, anyone who has Author access to the Place or Room can create pages in a folder. All members of a Place or Room can always see and open all the folders it contains. By hiding the "New" option, members with Manager access to a folder can prevent other members from creating pages in a folder.

## What is a Page?



- Basic unit for adding content to a Place
- Can include formatted text, images, and file attachments
- Authors can create pages in a Place using:
  - QuickPlace rich text editor
  - Import content from an existing Microsoft Office, HTML, JPEG, or GIF file
- Place members can create pages in Places, Rooms, or Folders
- Pages can be published as:
  - private drafts
  - a restricted set of readers and authors
- Pages can be checked in and out to control access during editing



### **Notes:** What is a Page?



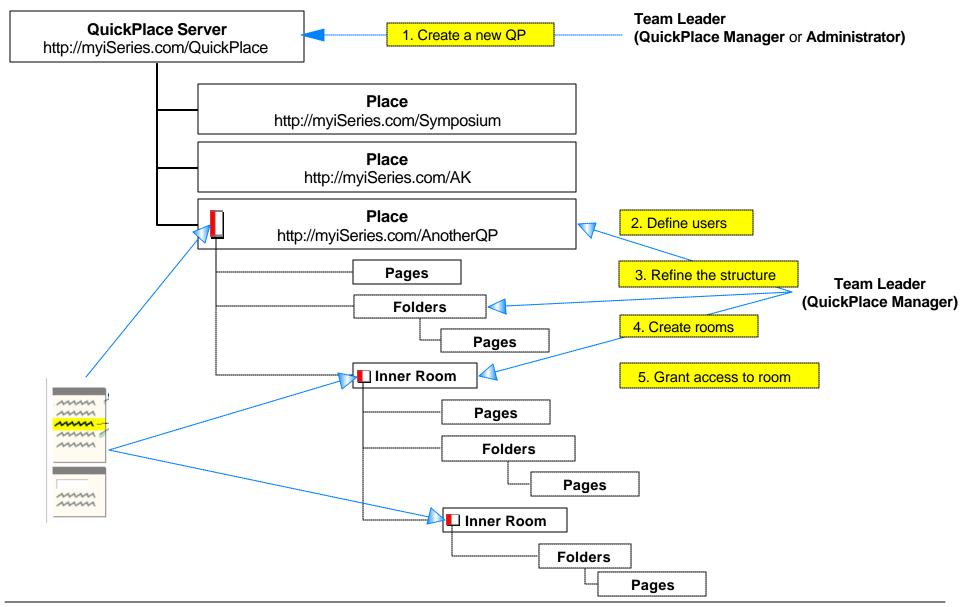
Pages are the basic unit for adding content to a Place and can include formatted text, images, and file attachments.

Authors can create pages in a Place using the QuickPlace rich text editor, or import content from an existing Microsoft Office, HTML, JPEG, or GIF file. Place members can create pages in Places, Rooms, or folders to which they also have Author or Manager access. A member who creates a page or who has been given edit rights to it can edit the page after it is published.

Pages can be published as private drafts or to a restricted set of readers and authors. Pages can be checked in and out to control access during editing.

### **QuickPlace Structure**





### **Notes:** QuickPlace Structure

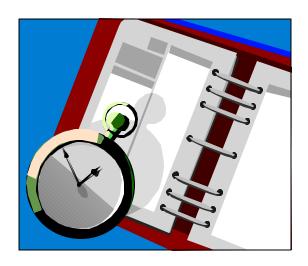


Here we outline the basic structure of a QuickPlace server. Notice that there are three (3) Places within this QuickPlace server. Also notice that within a Place you can have multiple pages, folders, and rooms.

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# Other components within a Place





Calendar



**Task List** 



Index

# **Notes:** Other components within a Place



Other components within in a Place include a calendar, task list, and index.

# **Using QuickPlace**



#### Team member creates online Place for the team to collaborate

#### Manager adds members

Readers, Authors, Managers

#### **Create Place elements**

- Discussion area
- Document Library
- Team calendar
- Task list

#### **Customize**

- Add "Rooms" as required
- Use "Themes" to change look and feel of the Place
- Use "PlaceTypes" to reuse content, structure, etc... from previous Place
- Create "PlaceBots" to automate or perform a task

### **Notes:** Using QuickPlace



<u>Themes</u>: When you create a Place, you can select its look and layout by choosing from a gallery of predefined themes. The theme controls the look of a Place by determining aspects such as fonts and background colors, how an element looks when it is selected, and where the navigational controls appear. You can create new themes based on existing themes or from scratch. By creating a custom theme, you can give your Place a strong brand identity, design it to look like other corporate sites, supply additional functionality, or just give it a unique look.

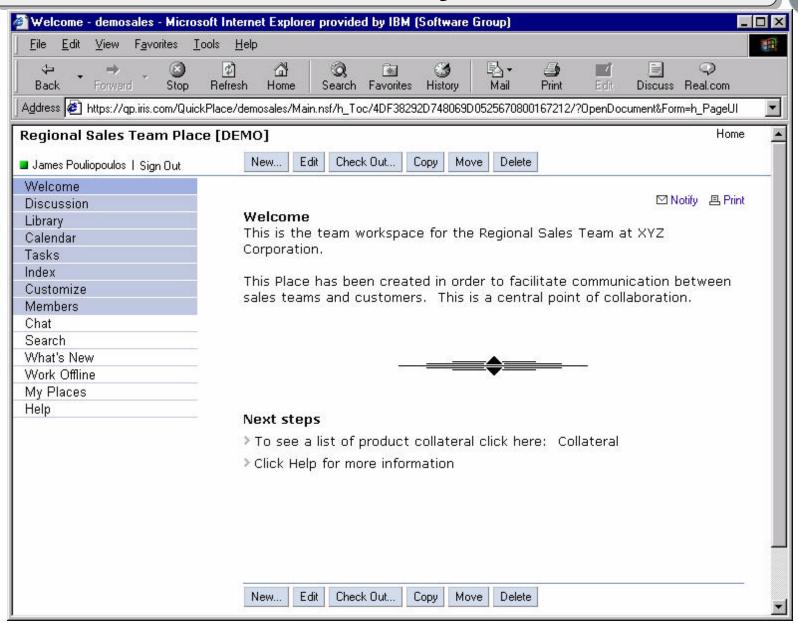
<u>PlaceTypes:</u> As you set up a Place to meet the needs of your team or organization, you may want to preserve your customizations for use in other places. For example, if you create a theme that gives a particular place the look and feel of your corporate Web site, you may want to make that design available for creating other Places in your organization. You can preserve the design and structure of a Place by creating a custom PlaceType. A PlaceType is a blueprint from which other users can create new places. If you are familiar with Domino/Notes architecture, a PlaceType is a Domino database template.

<u>PlaceBots:</u> A PlaceBot is an agent, written in either Java or LotusScript, that perfoms a task. PlaceBots can access, process, and manage the data in a Place. For example, you can create a PlaceBot that sends an e-mail to members of a Place notifying them when a particular document has been edited. You can set PlaceBots to run on a schedule, or run when a particular form is submitted. Or you can set a PlaceBot to run manually. You must have Manager access to the Place to create, edit, copy, delete, or run PlaceBots manually.

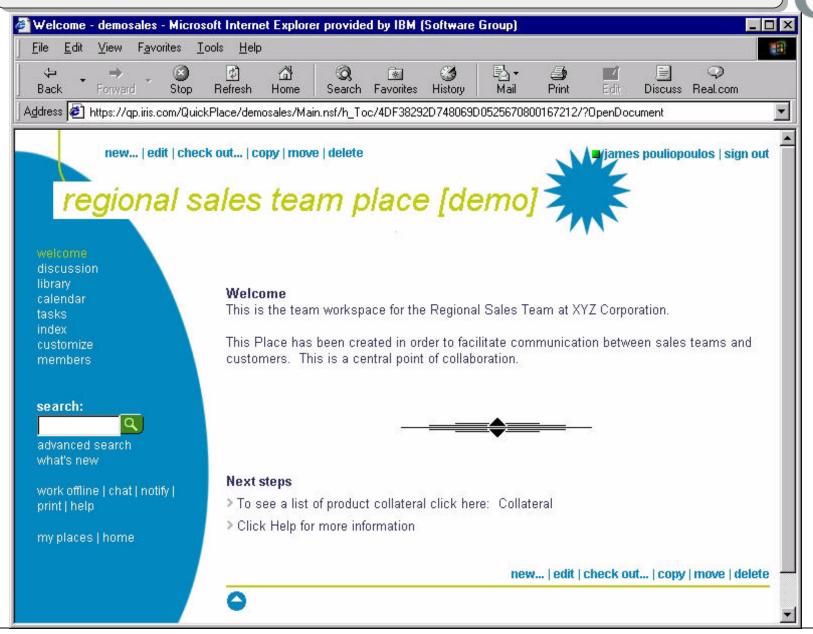
The next four slides show the same Place converted to a different look and feel using Themes that are built into QuickPlace. These four different looks took less than ten minutes to create and publish.

For more information on customizing QuickPlace, see the Lotus QuickPlace 3.0 Developer's Guide.

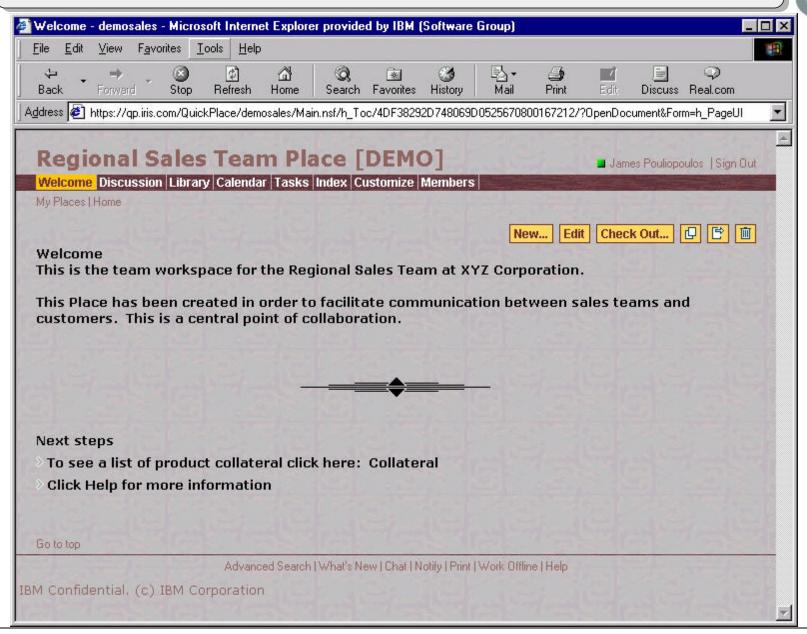
# **Themes - Standout Layout**



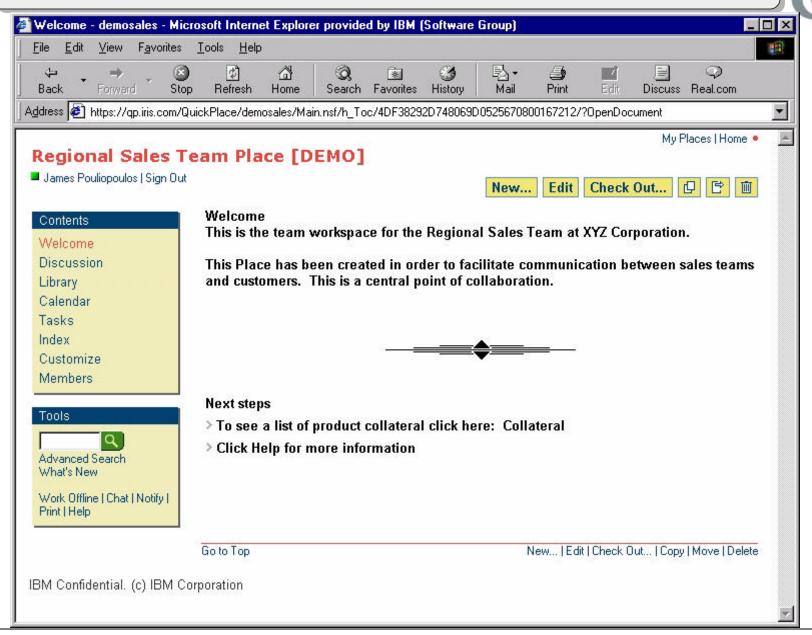
#### Theme #2



### Theme #3



### Theme #4



### Other functions available in

# QuickPlace user directory

- Uses external LDAP directory
- Central repository for user information
- QuickPlace administrator selects the directory for each server
  - Multiple servers must use same directory for multi-server session authentication

#### E-mail

- Uses Domino SMTP to send mail to members
- Supports inbound mail
  - Each Place has its own e-mail address
  - Uses mail-in database to receive mail

#### **Off-line access**

- Support to work with Places off-line
- Uses Domino Off-Line Services (DOLS)

### **Notes:** Other functions available in QuickPlace



<u>QuickPlace user directory:</u> An external LDAP directory that provides a central repository for user information. QuickPlace refers to the user directory to fulfil requests from members and applications and to locate contact information and other attributes for users, groups, and other entities in an organization.

For example, when a user invites members into a newly created Place, QuickPlace uses the directory to find the invitees and their e-mail addresses. When an invited member signs in to the Place, QuickPlace again refers to the user directory to authenticate the user's password.

The QuickPlace server administrator selects the directory for each server. In QuickPlace services that have multiple servers, you must configure all servers to use the same directory in order to use multi-server session authentication.

<u>Email:</u> QuickPlace uses the Domino SMTP service to send mail to members. Members can generate messages from links with a page and the QuickPlace service can be configured to automatically send members information about updated QuickPlace content. QuickPlace can rely on the native Domino SMTP routing, or you can configure the underlying Domino server to send outbound mail through a dedicated rely host.

For inbound mail, each QuickPlace has its own e-mail address and uses a mail-in database to receive mail. Contributions may be mailed into the QuickPlace allowing critical e-mails from external sources to be gathered for future reference.

Off-line access: QuickPlace provides the ability to work with Places offline through the use of Domino Off-Line Services (DOLS).

### Main Components of a QuickPlace - Admin



#### QuickPlace servers

#### QuickPlace service

- Multiple deployment of QuickPlace servers and clusters
  - Resides in the same network (not separated by a firewall)
  - Shares the same user directory and authentication system.
  - Connects to the same Place Catalog
- A QuickPlace server can only belong to ONE QuickPlace service
- Members can use single sign-on to access multiple servers
- Servers can reside in the same or multiple Domino domains

#### QuickPlace cluster

- Group of QuickPlace servers
  - Replicates data among themselves
- All servers in a cluster must be the same QuickPlace release
- Can be used for failover or load-balancing

#### Place Catalog

Collects information about all Places in a QuickPlace service

02/19/03

# **Notes:** Main Components of a QuickPlace - Admin



The main components of a QuickPlace from an administrator's perspective includes:

<u>QuickPlace servers:</u> A QuickPlace server is a Domino server to which you have added QuickPlace to. Each QuickPlace server is part of a QuickPlace service and hosts Places created by QuickPlace users. You can set up specialized QuickPlace servers that do not have Places on them to host the Place Catalog for the QuickPlace service or a Domino domain catalog for searches across multiple Domino servers.

QuickPlace service: A multiple server deployment of QuickPlace servers and QuickPlace clusters that reside in the same network (that is, are not separated by a firewall), share the same user directory and authentication system, connect to the same Place Catalog, and are managed by the same administration team. A QuickPlace server can belong to only one QuickPlace service. QuickPlace servers within a QuickPlace service share information and have a consistent configuration. Members can use single sign-on authentication to access all QuickPlace servers in a service. Typically, QuickPlace servers in a service reside within a single Domino domain, but a QuickPlace service can span multiple Domino domains as long as the servers are cross-certified with the Place Catalog server and have at least Editor access in the ACL of the Place Catalog database.

QuickPlace cluster: A group of QuickPlace servers that replicate data among themselves in real time. The servers that make up the cluster must all be running the same release of QuickPlace. QuickPlace does not support mixed-release clusters. QuickPlace servers can be clustered for failover using Domino clustering. The QuickPlace service treats a QuickPlace cluster as a single virtual server. In clusters that provide failover only, one member server, or node, is configured as the master server, and the othe nodes are configured as slaves. Under normal circumstances, the master server handles all incoming client requests. If the master server is unavailable for some reason, service fails over to the slave servers.

In a complex cluster configuration, load-balancing services are provided in addition to failover. Load balancing requires the installation of a special computer known as a network traffic dispatcher. The network traffic dispatcher is not a QuickPlace server, but is responsible for receiving all incoming client requests and distributing them among the cluster nodes based on the availability of each node. In this type of cluster, individual nodes remain hidden. From a user's point of view, all interaction is with the virtual server. For example, in a cluster that includes servers apple.acme.com, orange.acme.com, and kumquat.acme.com, and the designated virtual server for the cluster is the network traffic dispatcher fruit.acme.com, users address all QuickPlace requests to fruit.acme.com rather than to individual servers in the cluster. Fruit.acme.com then directs the requests to one of the cluster nodes based on availability.

<u>Place Catalog:</u> The Place Catalog is a Domino database that collects information about all Places that are on the QuickPlace servers and clusters in a QuickPlace service. The Place Catalog contains information about servers, places, and members of a service. Using this information, users and administrators can work with all Places in the entire service, rather than being confined to working with Places on a single server only.

Administrators use the information in the Place Catalog to establish management policies and ensure the integrity of Places across multiple servers. The QuickPlace administration tool, QPTOOL, queries the Place Catalog and generates reports that help track QuickPlace use.

When building the My Places view for a user, the QuickPlace server uses the Place Catalog to track the user's membership in places and to determine which servers to search when a user performs a cross-place search.

By default, the QuickPlace setup program creates a Place Catalog in the prince server's data directory. To configure multiple servers to use a single Place Catalog, add in the information library in the Place Catalog server must be accessible over the Notes port (1352) and HTTP to all servers 4 the QuickPlace service.

### **How Do Teams Use QuickPlace?**



#### **Out-of-the-box Team Workspace**

#### Tailored to an Industry or Business Process

- Product Lifecycle
- Professional Services Engagement
- Project Management
- Mergers and Acquisitions
- Automated RFP
- Claim Management
- Supply Chain Crisis Management
- Case Management
- Team Library



### Notes: How Do Teams Use QuickPlace?



Here are some examples of how you could use QuickPlace:

**Team place:** Simple team workspace for intranet and/or extranet collaboration.

**Project management:** Identify, assign and track tasks and deliverables, make and track schedules, plan and hold critical meetings, etc...

**<u>Discussion</u>**: Lightweight place in which to hold discussions, co-author documents, make decisions, and track action items.

**Event planner:** Plan an event and share photos, etc... afterwards.

<u>Team Library:</u> Co-author documents, spreadsheets and presentations, organize them in a central location, make it easy for a larger audience to browse, search, and read them.

Consulting project: Consulting teams can host a client team in a project place.

<u>Development project:</u> Capture requirements, discuss designs, develop storyboards, prepare presentations, write and review specifications, make schedules, manage action items, analyze competition, develop feature lists, document prototypes, plan and report on testing.

**Engineering project:** Author, share, review and mark up CAD drawings.

Evaluation project: Capture requirements, evaluate vendors and features, discuss pricing and terms, plan deployment.

<u>Launch</u>: Plan and track the rollout of a new product/service to market. Plan marketing and sales enablement, prepare press releases, manage contacts, organize trade shows.

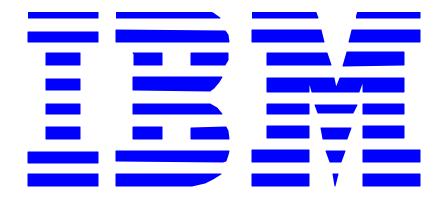
**Proposal development:** Invite proposals, review and evaluate, develop final proposal

### **IBM - QuickPlace at Work**



#### IBM Team Workspaces, as of August 2002

- All IBM employees worldwide are able to create, own, and manage a Place(s) for internal or external use via the IBM intranet
  - http://w3.lotus.com/quickplace
- >3,000 active Places for intranet use only
- >3,000 active Places for extranet use



# Notes: IBM - QuickPlace at Work



For more infomation on creating a QuickPlace hosted by Lotus, go to http://w3.lotus.com/quickplace. (Note: this is an IBM only internal web site.)



# Installing and Using QuickPlace on the IBM iSeries server

# **Notes:** Installing and Using QuickPlace



In this next section of the presentation, we discuss installing and using QuickPlace on the IBM

iSeries server.

# **QuickPlace Release Compatibility**



- QuickPlace 2.08 can be stand alone or on a Domino server
- QuickPlace 3.0 requires a Domino server

Domino ===>	5.0.8	5.0.9	5.0.10	5.0.11	Domino 6
QuickPlace 2.0.8	Yes	No	Yes*	No	No
QuickPlace 3.0	No	No	Yes	Yes**	No

<sup>\*</sup>QP 2.0.8 compatibility with Domino 5.0.10 is currently available as a hotfix

OS/400 ===>	V4R5	V5R1	V5R2
QuickPlace 2.0.8	Yes	Yes	Yes
QuickPlace 3.0	No	Yes	Yes

<sup>\*\*</sup>QP 3.0 compatibility with Domino 5.0.11 is currently available as a hotfix

# **Notes:** QuickPlace Release Compatibility



QuickPlace 3.0 is installed on a Domino 5.0.10 or later server, in a configuration that is referred to as an overlay. In previous QuickPlace releases, a standalone QuickPlace server that provided limited Domino functionality was available, but in release 3.0, the standalone server is no longer an option. By installing QuickPlace on your Domino server, you can take advantage of Domino functionality, such as clustering and replication, to manage your Places.

If you are upgrading your QuickPlace servers to release 3.0, try to upgrade all servers in the domain at the same time. You can upgrade your QuickPlace servers without upgrading your Places, which significantly reduces the time in which your servers are down.

If you have an existing Domino environment, but are not running Domino release 5.0.10, upgrade your Domino servers to the 5.0.10 maintenance release; then install or upgrade to QuickPlace 3.0. The Domino server type that you choose depends on whether or not you can cluster your QuickPlace servers. QuickPlace takes advantage of Domino clustering functionality, so if you plan to cluster your servers, choose the Domino Enterprise server license.

Note: QuickPlace 3.0 compatibility with Domino 5.0.11 is now available as a hotfix.

# **Languages and Platforms**



#### **Language Support:**

- English (American)
- English (International)
- Danish
- Dutch
- English
- French
- Finnish
- Italian
- Norwegian
- Brazilian Portuguese
- Spanish
- Swedish
- Chinese (Simplified)
- Chinese (Traditional)
- Japanese
- Korean

#### **Cross-Platform Server Support:**

- IBM iSeries (OS/400)
- IBM pSeries (AIX)
- IBM zSeries (OS/390 & z/OS)
- Microsoft Windows NT & 2000
- Sun Solaris

# **Notes:** Languages and Platforms



In non-English environments, Domino 5.0.10 or 5.0.11 may be installed either as a fully translated national language version (for example French #2928) or it may be installed as English (#2924) with a language pack optionally applied. The QNOTES user profile locale value will be set according to the language version or language pack that is installed.

Prior releases of QuickPlace for iSeries had corresponding national language versions available. However, with QuickPlace for iSeries 3.0, only an English language feature is available which may be used with a corresponding language pack. A language pack is an image that can be used to apply translated resource files to your Domino or QuickPlace product and servers. The result is a product that provides English interfaces for administration functions and translated interfaces for client/end-user functions.

#### Supported server operating systems:

- Microsoft Windows NT 4.0 operating system
- Microsoft Windows 2000 operating system (Server and Advanced Server editions)
- IBM AIX operating system: Version 4.3.3
- iSeries/OS 400 -versions: V5R1, V5R2
- zSeries -OS/390 2.10, and zSeries OS, z/OS 1.1 through 1.4.
- Sun Solaris 8

# Installing QuickPlace on the iSeries



#### IBM Lotus QuickPlace for iSeries

• Product ID: 5733-LQP

#### Use the Load and Run (LODRUN) command

LODRUN DEV(\*OPT) DIR('/OS400)

# Notes: Installing QuickPlace on the iSeries



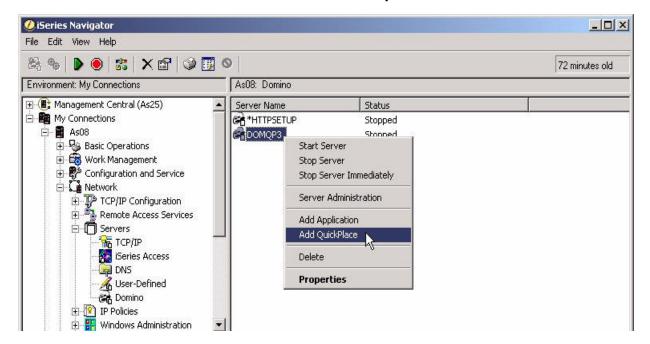
The IBM Lotus QuickPlace for iSeries product (product id 5733-LQP) is installed on the iSeries server using the Load and Run (LODRUN) OS/400 CL command.

# **Configuring QuickPlace**



#### Configuring QuickPlace on an existing Domino Server

- Using iSeries Navigator
  - Network -> Servers -> Domino
  - Right-click the Domino server name that QuickPlace is to be added to and click Add QuickPlace from the drop-down menu



- Using OS/400 CL command
  - Add QuickPlace to Domino (ADDLQPDOM)

# **Notes:** Configuring QuickPlace



Perform the following steps to configure QuickPlace on an existing Domino server using iSeries Navigator:

- Ensure the Domino server you are going to install Domino on has been ended.
- Open iSeries Navigator and expand the iSeries server that your Domino server is installed on.
- Expand Network->Servers then click Domino.
- In the right panel a list of configured Domino servers are displayed.
- Right-click the Domino server that you want to install QuickPlace on.
- From the drop-down menu, click Add QuickPlace.
- Your Web browser will launch and connect to the Domino for iSeries \*HTTPSETUP server. You will proceed through a series of Web pages which make up the QuickPlace for iSeries Web Setup Web site.

(Note: When using iSeries Navigator to add QuickPlace to a Domino server, the \*HTTPSETUP server will automatically be started, even if it is not already active.)

• You must enter your OS/400 user ID and password. This OS/400 user ID must have the appropriate authorities required to set up QuickPlace.

# Adding QuickPlace to Domino Server



♥ [Session A - [24 x 80]	_ O X						
File Edit Transfer Appearance Communication Assist Window Help							
PrtScrn Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipbrd Support Index							
Add QuickPlace to Domino (ADDLQPDOM)							
Type choices, press Enter.							
Domino server name							
QuickPlace administrator name							
Administrator account							
Administrator password	_						
Additional Parameters							
Traditional Farameters							
Start Domino server <u>*NO</u> *YES, *NO							
	Bottom						
F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use t	his display						
F24=More keys							
M <sup>A</sup> a	05/037						
Connected to remote server/host rchas08 using port 23	- li						

# **Notes:** Adding QuickPlace to Domno Server



When adding QuickPlace to an existing Domino server (either with iSeries Navigator or using the OS/400 CL command) you must specify the following parameters:

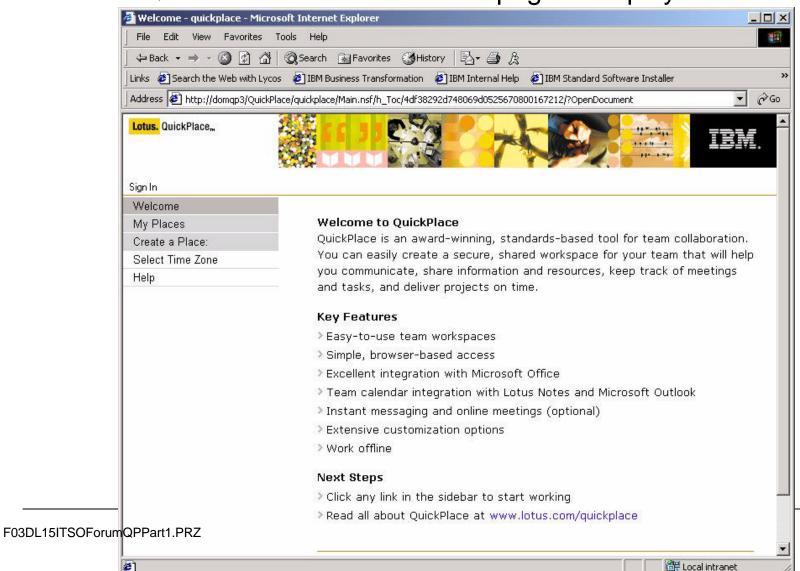
- The name of the Domino server where you will add QuickPlace.
- Specifiy the name and password of the person who will be the administrator for this QuickPlace server. The administrator's name should be a local user and should not be present in the external directory.
- The Server ID password is required only if the Domino server is password-protected. You would have specified this password when the Domino server was created.
- Select whether you want to start the Domino server automatically after adding QuickPlace to it.

If QuickPlace was successfully added to the Domino server you will receive a "Congratulations" message.

# **Accessing QuickPlace**



- Start your Web browser and enter the URL:
  - http://DominoServerName:port/quickplace
- The QuickPlace default Welcome page is displayed



# **Notes:** Accessing QuickPlace



Once you have added QuickPlace to the Domino server and restarted the Domino server, you or your users can now start to configure your own Places.

# **Web Browser Options**



#### Works best with Microsoft Internet Explorer 5.5

Support for other Web browsers with restrictions

#### Set TLS 1.0 off:

- Under Tools -> Internet Options -> Advanced tab -> Security section
  - set TLS 1.0 option off
  - set PCT 1.0, SSL 2.0 and SSL 3.0 options on

#### If TLS 1.0 set on:

- Server appears as not responding
- First time access may be much slower

# **Notes:** Web Browser Options



#### Supported client operating systems:

- Windows NT
- Windows 98
- Windows 2000
- Windows XP Professional
- Macintosh System 9

#### **Supported Web browsers:**

- Microsoft Internet Explorer 5.5 for Windows
- Microsoft Internet Explorer 6 for Windows
- Microsoft Internet Explorer 5.1 for Macintosh
- Netscape 4.79 for Windows

# Tips for Running QuickPlace on iSeries



#### Domino must be loaded on same iSeries server as QuickPlace

Software levels of the two products must be compatible

#### Can add QuickPlace to multiple Domino servers

#### QuickPlace Domino server must use the Domino HTTP server

Does not work with Domino servers using the OS/400 HTTP server

#### File attachment size limited to 2GB

#### **User directories supported:**

- LDAP server
- Lotus Domino server

# **Notes:** Tips for Running QuickPlace on iSeries



There several items that need to be considered when running QuickPlace and Domino on an iSeries server.

Lotus Domino for iSeries must be installed on the same iSeries server as Lotus QuickPlace for iSeries. Also the software level of the two products must be compatible. QuickPlace 3.0 requires Domino 5.0.10 or 5.0.11.

You must install both Domino and QuickPlace on an iSeries server by installing Domino first and then installing QuickPlace. If you already have a previous version of QuickPlace installed (for example, release 2.0.8), you must first remove the QuickPlace product and then install QuickPlace 3.0.

If you have the compatible releases of Domino and QuickPlace already installed on your iSeries server, you can add QuickPlace to existing Domino servers or configure a new Domino server for use with QuickPlace.

The Domino server with QuickPlace must use the Domino HTTP server. QuickPlace will not work with Domino servers using the OS/400 HTTP server.

File attachments to a page in QuickPlace on the iSeries platform are limited to 2GB in size.

From the QuickPlace home page, the administrator can specify a user directory from which QuickPlace members can be selected. The following directory types are supported by QuickPlace for iSeries:

- LDAP server This choice allows you to add any LDAP server, including Lotus Domino or iSeries servers. When specifying an iSeries LDAP server, your iSeries server must be running V5R1 or later.
- Lotus Domino server This option is supported for backward compatibility purposes only. Once you have upgraded your Places to release 3.0, you should switch to an LDAP user directory.

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# Upgrading to QuickPlace 3.0 for iSeries



#### Only supports upgrade from QuickPlace 2.0.6a or later

• If current release is prior to 2.0.6a, recommended to first upgrade to 2.0.8

#### Steps for upgrading:

- Install or upgrade to Domino 5.0.10 or 5.0.11
- Install QuickPlace 3.0
- Add QuickPlace to an existing Domino server
- Upgrade the design of the databases on the server
- Upgrade the Places and PlaceTypes
- Register the Places and PlaceTypes with the Place Catalog in your service

#### See Lotus QuickPlace 3.0 for iSeries Installing & Managing Guide

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## **Notes:** Upgrading to QuickPlace 3.0 for iSeries



QuickPlace 3.0 for iSeries only supports an upgrade from QuickPlace 2.0.6a or later. If your current release of QuickPlace for iSeries is prior to 2.0.6a, it is recommended tha you first upgrade to 2.0.8. This will simplify the process of upgrading to QuickPlace 3.0.

With the QuickPlace 3.0 release, the process of upgrading your QuickPlace server and Places has been separated into independent stages. This separation gives you the flexibility to upgrade your QuickPlace servers with significantly less downtime than in previous releases.

Once you install the new QuickPlace server, users can continue to work in their old Places and create new Places. The old Places remain available to users except when they are locked for the relatively short time during the actual upgrade process (old PlaceTypes are not available until they are upgraded). You can choose to upgrade Places and PlaceTypes when it is most convenient.

To upgrade to QuickPlace 3.0 you must install or upgrade to Domino 5.0.10 or 5.0.11, then install QuickPlace 3.0, add QuickPlace to an existing Domino server, upgrade the design of the databases on the server, upgrade the Places and PlaceTypes, and register the Places and PlaceTypes with the Place Catalog in your service.

# **QuickPlace Administration Tool (QPTool)**



#### Can use for many common QuickPlace administrative tasks

- QPTool is a server task that you run with arguements
- Designed to run while QuickPlace Domino server is active

#### QuickPlace for iSeries offers two options for using QPTool:

- OS/400 CL command of QPTOOL
- From Domino server console

See QuickPlace 3.0 Administrator's Guide for details.

# **Notes:** QuickPlace Administration Tool (QPTool)



QuickPlace administrators can use the QuickPlace Administration Tool (QPTool) application to automate many common tasks. QuickPlace for iSeries offers administrators two options for working with the QPTool utilities. You can initiate a command using the OS/400 CL command interface or through the Domino server console. The syntax used to initiate the commands depends on which interface you use.

QPTool is a server task that you run with arguements to do QuickPlace administrative tasks. QPTool commands are designed to be used while the QuickPlace Domino server is active. You can use QPTool to complete the following tasks:

- Change user and group names in places
- Change the hierarchy of names in places
- Reset user passwords
- Remove members from places
- Send newsletters to subscribers
- Send mail to managers and members of places
- Register and unregister places
- Automate replica stub information
- Upgrade places and PlaceTypes
- Refresh places and PlaceTypes
- Lock an unlock places
- Archive places
- Remove places or PlaceTypes
- Update statistics in the Place Catalog
- Generate reports about places and servers
- Clean up dead mail
- Execute an XML API file

For detailed information on each utility available with QPTool, see the QuickPlace Administrator's Guide.



# **New Features in QuickPlace 3.0**

# **Notes:** New Features in QuickPlace 3.0



In this section of the presentation we take a brief look at some of the new features and enhancements available in QuickPlace 3.0 from both a QuickPlace administrator view and an end-user viewpoint.

## **New Features for Administrators**



#### **QuickPlace service and Place Catalog**

- Central control point across multiple QuickPlace servers and clusters
- Collects data about Places

#### **QPTool**

Utility for executing a wide variety of administrative tasks

#### Web caching

Provides faster performance

#### **Native directory names**

Provides better integration of member management with other applications

#### Clustering support for all platforms

Mapping between QuickPlace and LDAP

**SSL for LDAP directories** 



#### **Notes:** New Features for Administrators



QuickPlace service and Place Catalog - QuickPlace 3.0 introduces two important new concepts to QuickPlace administration:

- The QuickPlace service, a collection of servers administered by the same team on the same network.
- The Place Catalog, a listing of all Places that currently reside on servers within a QuickPlace service.

You administer QuickPlace servers in the QuickPlace service through the new administrative tool, QPTool, which in turn uses the Place Catalog. The catalog ensures that Place names are unique between the servers. Using QPTool, you can generate reports from the Catalog to drive management policies. The Place Catalog contains entries for each Place and for each QuickPlace server in the service. The Place Catalog entries include information such as access time, size, membership, and so on.

**QPTool** - QPTool is the successor to the Admin Utility, an administration tool provided in the previous releases of QuickPlace. With the Admin Utility, you could administer a single server. With QPTool, you can administer all the servers in a cluster. QPTool is a command-line tool that offers all the features of the Admin Utility as well as adding a number of new ones. For example, you can use QPTool to register Places with the Place Catalog and subsequently generate reports from the Place Catalog.

**Web caching -** To improve performance, Web caching has been added to QuickPlace 3.0. Web caching has been included on the server's disk to store pages the user has previously accessed. When the user later reopens the page, the server retrieves it from the cache, instead of rebuilding it. Building a page can require numerous individual steps, so retrieving an existing page from the cache can save significant time.

**Native directory names** - Native directory names in QuickPlace 3.0 provides better integration of member management between QuickPlace and other applications that share an external directory for authenticating users. QuickPlace no longer changes the format of names for members who come from an external directory.

**Clustering support for all platforms -** The previous release of QuickPlace introduced clustering for Windows NT servers only. QuickPlace 3.0 supports the same clustering functionality on all supported server platforms.

**Mapping between QuickPlace and LDAP -** If your QuickPlace server is connected to an LDAP user directory, the LDAP and QuickPlace servers might use and understand different properties for the same directory object. You must translate the LDAP server's entries so that the QuickPlace server can understand its information. You translate, or map, the information using XML.

**SSL for LDAP directories -** You can now set up the QuickPlace 3.0 server to use SSL between the server and the LDAP user directory. This provides a secure communication channel for better security during directory lookups and authentication.

Installation and upgrading - To improve the scalability, manageability, and interoperability of QuickPlace deployments, QuickPlace 3.0 no longer supports a standalone configuration. QuickPlace 3.0 must always be installed in an overlay configuration on a Domino server. There is also a separated install, server setup, and upgrade processes. (These were previously combined in a single procedure.) This helps minimize server downtime. You can now bring down the server only to install QuickPlace 3.0 and immediately bring it back up. You can then upgrade your server, Places, and PlaceTypes without bringing down the server. In addition, you can upgrade in stages, upgrading only certain Places and PlaceTypes at a time.

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# **New Features and Enhancements for Users**



#### My Places

Real-time awareness and chat

**Search Places and Advanced Search** 

**Calendar subscription** 

Improved usability

**Integration with Microsoft Office** 



# **Notes:** New Features and Enhancements for Users



QuickPlace 3.0, the latest release of Lotus's Web tool for team collaboration, offers many new and improved features. These enhancements cover all major areas of QuickPlace and apply to end users, designers, and administrators. This section of the presentation gives you an overview of some of these new QuickPlace 3.0 features for end users.

The next several pages will take a more indepth look at each of these new functions.

# My Places



#### My Places provides a single consolidated listing of:

- All Places where you are a member
- Places open for anonymous access

#### Works across multiple QuickPlace servers

End users log in once and can access any Place they are a member of

#### Only works for members added from external LDAP directory



67 02/19/03

# **Notes:** My Places



The new My Places feature was added in response to user requests. My Places provides a central, personalized listing of all Places where you are a member, as well as Places open for anonymous access. It also works across multiple QuickPlace servers. My Places gives you a single, consolidated list of all the Places you are interested in. The My Places view displays the title of the Place, its size, and the date the Place was last modified. You can bookmark My Places and open it at any time. And when you're inside a Place, you can go directly back to the My Places page from the Table of Contents. You can also choose to open My Places automatically when you log in.

My Places works only for members added to the service from an external LDAP directory. QuickPlace uses the directory credentials to find out which groups a user belongs to and then queries the Place Catalog to find all the places that the user is a member of, either explicitly or as the result of a group membership. It then provides links to those places along with their approximate size and the date when they were last modified.

#### Real-Time Awareness and Chat



#### **Before QuickPlace 3.0:**

Limited team chat capability using built-in, modified version of Sametime

#### With QuickPlace 3.0:

Support for connecting to existing, full-featured Sametime server

#### **Provides new features:**

- Awareness and chat
  - Allows you to see and chat with users currently online
- Live name links throughout a Place
- Schedule online meetings in QuickPlace calendar







## **Notes:** Real-Time Awareness and Chat



Lotus Sametime integration provides increased productivity by adding presence awareness, instant messaging (IM), and Web conferencing to any Place.

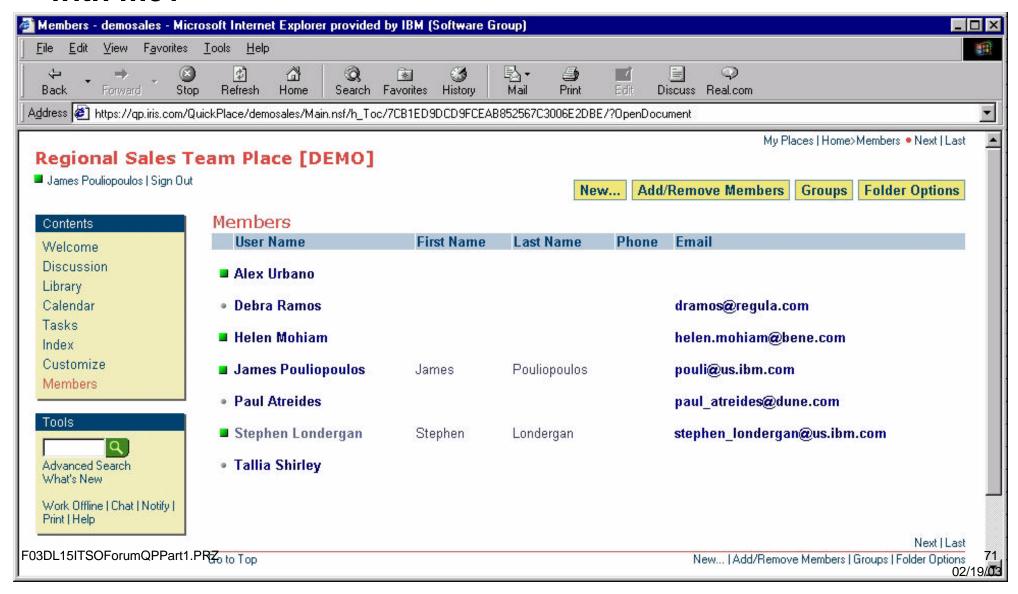
If the QuickPlace server administrator of your Place has enabled this feature, you can initiate a chat with other QuickPlace members. You simply choose Chat from the QuickPlace Table of Contents, select the person you want to chat with, and type your message in the chat window that appears. As soon as you finish typing your message and send it, it appears on the receiver's screen and the conversation's under way.

Real-time awareness goes beyond the ability to initiate a chat with someone on the members list. It also includes live name links throughout a Place, which lets you encounter members within documents they have authored. For example, if you are reading a page and the author of that page is currently online, a green square icon appears next to the author's name. You can click on the name to start a chat session with that person.

#### **Embedded Presence Awareness**



# Who's online and available to answer questions or collaborate with me?



## **Notes:** Embedded Presence Awareness



End users who have a green icon next to their names are online. These online users may also be logged into this same QuickPlace, another QuickPlace, or they may just be using Sametime instant messaging and are logged on but not "in" this QuickPlace.

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## **Search Places and Advanced Search**



### **Before QuickPlace 3.0:**

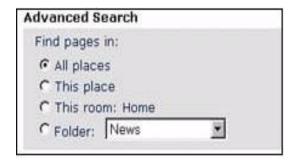
Only search in current Place

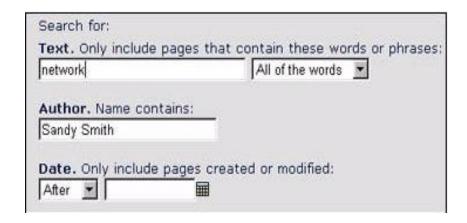
### With QuickPlace 3.0 Search Places:

- Search for pages in every Place you are a member
- Search for pages in Places that allow anonymous access

## Search Places is available through Advanced Search

### Narrow search and sort search results





## **Notes:** Search Places and Advanced Search



In previous releases of QuickPlace, you could only search the Place you were currently in. With Search Places, you can now search for pages in every Place where you are a member as well as Places that allow anonymous access.

Search Places is available through Advanced Search. When you select Search in the Table of Contents, you can decide whether to search all Places, only the particular Place or room you are in, or a specified folder. QuickPlace searches all Places that you have access to, based on the information you enter. This includes Places running previous releases of QuickPlace.

Advanced Search also gives you more control over narrowing your search and sorting your search results, making it easier to find the information you are looking for.

Because QuickPlace content is stored within Domino databases, all the information in a QuickPlace can be full-text indexed. QuickPlace 3.0 uses Domino Domain Search to search your Places. This takes advantage of Domain Search's access control security features so that search results contain only pages to which you have access. Internally, Search Places generates search results in XML, and then transforms the results to HTML for display.

With Search Places, place members added from an external LDAP directory, can search across multiple places in a domain. Search Places requires configuration of a Domain Catalog server to index the databases. Search Places manages security using the access controls built into Domain Search. As a result, the search results returned to a Place member display only those pages to which a user has access.

## **Calendar Subscription**



### See events posted to Place calendar in personal calendar

Allows you to keep track of team or project events in personal calendar

### **Calendar subscription works with:**

- Lotus Notes (both Release 5 and 6) calendars
- Microsoft Outlook calendars

### Enable calendar subscription by specifying it as a Preference

#### Administrative control

 Place manager can specify whether or not Place calendar sends new calendar events to members of the Place who have subscribed

## **Notes:** Calendar Subscription



With QuickPlace 3.0, you can subscribe to receive messages in your personal calendar about events posted to a Place calendar. This lets you keep track of team or project events in your personal calendar.

Calendar subscription works with Notes (both Release 5 and 6) and Microsoft Outlook calendars.

Enabling calendar subscriptions is easy; simply choose it as a Preferences option. At the same time, to provide an administrative layer of control to this feature, the Place manager can specify whether or not the Place calendar sends these new calendar events to members of the Place who have subscribed.

# **Calendar Integration**



Team
Calendar
(QuickPlace)

Team events sent to team members' calendars





Online meetings scheduled via QuickPlace

Lotus Notes or Microsoft Outlook Personal Calendar



Online meeting URL embedded in end user calendar entry

Sametime Meeting Center

# **Notes:** Calendar Integration



There is a three way integration between calendaring in QuickPlace, the Sametime Meeting Center, and calendar support in Lotus Notes or Microsoft Outlook as shown on this slide

## **Usability Enhancements**



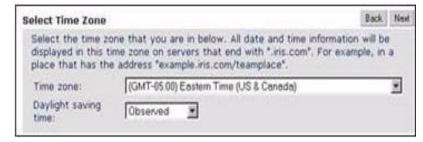
### **New Room Map**



### More Show/Hide options in Basics



### **New Select Time Zone feature**



## **Notes:** Usability Enhancements



Several improvements to the QuickPlace 3.0 user interface make your work with Places easier and more efficient:

- The new Room Map presents a clickable window that lists all rooms in the Place to which you have been granted access. These rooms appear in hierarchical order, to help you quickly navigate throughout the Place.
- QuickPlace 3.0 improves customization by offering more Show/Hide options in Basics so that you, as Place manager, can hide unwanted features. New PlaceType options also allow you to lock the sidebar and hide the members page in derived Places. You can disable the refresh option if you want to prevent live updates from the administrator.
- The new Select Time Zone feature lets you specify the time zone in which all date and time information should be displayed in the Place.

## **Integration with Microsoft Office**



- Author content using any Microsoft Office application
  - Publishs automatically and seamlessly on the Web in HTML
  - Content created in Microsoft Office maintained in native format
- Team members can read Microsoft Office-based content
  - Whether or not they have Microsoft Office on their desktop
  - Regardless of what version of Microsoft Office they are using
- Office documents can be used as custom QuickPlace forms
  - New content created in QuickPlaces have a standardized look and feel
  - Benefit from formatting and data entry capabilities of Microsoft Office tools
- Drag-and-drop Microsoft Office documents directly from desktop



## **Notes:** Integration with Microsoft Office



QuickPlace integrates tightly with Microsoft products for enhanced ease of use in several key ways:

- QuickPlace enables users to author content using any Microsoft Office application, and publish it automatically and seamlessly on the Web in HTML. Content created in Microsoft Office, such as Excel spreadsheets or Word documents, are maintained in QuickPlace in its native format for easy updating, yet are instantly accessible to Web browsers. Team members can read Microsoft Office-based content whether they have Microsoft Office on their desktop or not, and regardless of what version of Microsoft Office they are using.
- Office documents can be used as custom QuickPlace forms. In this way, new content created in Places can have a standardized look and feel, and benefit from the formatting and data entry capabilities of the Microsoft Office tools.
- QuickPlace users can drag-and-drop Microsoft Office documents and other content directly from their desktop into a Place.

## Creating a Page with Microsoft Office



# Work with the following Microsoft programs to create a QuickPlace page:

- Internet Explorer
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Excel

Support for Office 97, Office 2000, or Office XP versions only



## Notes: Creating a Page with Microsoft Office



If you are using Internet Explorer and Microsoft Word, Microsoft PowerPoint, and/or Microsoft Excel are installed on your computer, you can work with these programs within QuickPlace to create a QuickPlace page. You must use Microsoft Office 97 or Microsoft Office 2000 versions of these applications only; you cannot create QuickPlace pages using earlier versions of Word, PowerPoint, or Microsoft Excel.

When you begin creating a page using Word, PowerPoint, or Excel, QuickPlace creates a temporary file for the page in the Temp subdirectory of your Windows directory. The temporary file has the file name QuickPlace Page x (where x is a number) and the file extension of .DOC (for a Word file), .PPT (for a PowerPoint file), or .XLS (for an Excel file).

When you finish creating a page using one of these programs, QuickPlace copies the temporary file and converts it to HTML format, the format QuickPlace uses for displaying pages in your Place.

**Note:** You cannot attach files to a page you create using Word, PowerPoint, or Microsoft Excel.



# **Summary**

# **Notes:** Summary



In this final section of the presentation we provide sources of additional information for deploying and using Lotus QuickPlace 3.0 on the iSeries server.

## **Futures**



## Lotus rebranding QuickPlace to IBM Lotus Team Workplace

### QuickPlace 3.0a for iSeries available by March 1, 2003

Includes important fixes to 3.0

Support for Domino 6.0.x expected by year end.

## **Notes:** Futures

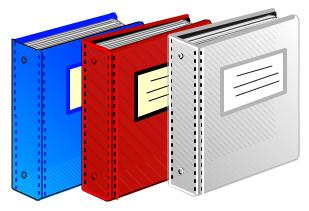


IBM Lotus software is currently transitioning many of its products to simpler, descriptive names designed to help make them more easily recognizable to customers. As part of this transition, Lotus QuickPlace will be named Lotus Team Workplace, to represent the core functionality of the product. For more information on this renaming project, please visit http://www.lotus.com/brand

# **QuickPlace 3.0 Documentation Library**



QuickPlace 3.0 Release Notes
QuickPlace Installation and Upgrade Guide
QuickPlace Administer's Guide
QuickPlace Developer's Guide
Installing and Managing QuickPlace 3.0 for iSeries
QuickPlace Deployment Guide



Documentation available at: <a href="http://www.lotus.com/ldd/">http://www.lotus.com/ldd/</a>

## **Notes:** QuickPlace 3.0 Documentation Library



Listed here is the documentation or white/yellow books that are available for QuickPlace 3.0. These manuals can be downloaded from the Lotus Developer Domain Web site (http://www.lotus.com/ldd).

## **Web Sites**



### Lotus QuickPlace home page

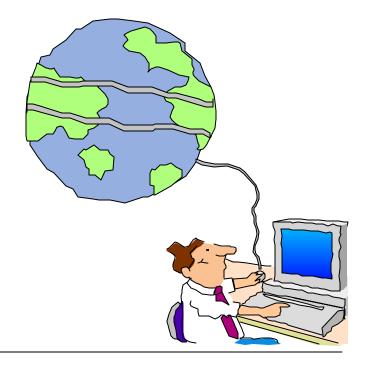
http://www.lotus.com/quickplace

### Lotus QuickPlace for iSeries

http://ibm.com/servers/eserver/iseries/quickplace/

## **Lotus Developers Domain**

http://www.lotus.com/ldd



## Notes: Web Sites



Here are important Web sites related to QuickPlace.

### Redbooks



**Deploying QuickPlace, SG24-6535** 

**Customizing QuickPlace, SG24-6000** 

Lotus QuickPlace for AS/400 Setup and Management, REDP0045



International Technical Support Organization

## Notes: Redbooks



This page lists the QuickPlace redbooks and redpapers that are available on the IBM Redbooks web site (http://www.redbooks.ibm.com).

Note: Unfortunately all of these redbooks are currently based on QuickPlace 2.0.8.

## **ITSO Rochester 2003 Domino Residencies**



#### **Planned**

- Using LEI 6 and DECS on the iSeries server
  - Scheduled for April 24 June 6
- Domino for iSeries Best Practices Guide
  - Scheduled for July 21 August 29
- Integrating Sametime and QuickPlace into your iSeries applications
  - Scheduled for October 13 November 21

## Tentative (planned for 3Q or 4Q)

- Domino 6 and WebSphere 5 Integration
- Multiple version capable release for Domino for iSeries

### If interested in participating

- See ITSO Web site: <a href="http://www.redbooks.ibm.com">http://www.redbooks.ibm.com</a> click on Residencies
- ITSO pays authorized travel and living expenses for all residents
  - does not compensate for the time or services of its residents
  - for IBMers, ITSO residency travel is pre-approved

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## **Notes:** ITSO Rochester 2003 Domino Residencies



This is a list of currently planned and tentatively planned Domino for iSeries residencies for 2003. These residencies will be run in the ITSO Center in Rochester, Minnesota. Each of these residencies will produce a redbook as well as possibly some related materials like presentations and hands-on labs.

Accepted residents join a multinational team, typically for a two-to-eight week effort, at an ITSO Center on or near the IBM development location. Often the residency leader and the accepted residents begin their communications in the weeks before the start of the residency in order to get a headstart. Working long hours during the residency is common. The emphasis is on producing the content needed for the redbook by the last day of the residency. Benefits are many...network building, obtaining a unique view of emerging technologies, meeting developers.....

Note: ITSO pays authorized travel and living expenses for all residents, but does not compensate for the time or services of its residents. For IBMers, ITSO residency travel is pre-approved

# Lab



