IBM® Lotus® Connections R2
Reviewer’s Guide

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Abstract: The Lotus Connections Reviewer's Guide provides an overview to the latest version IBM's social software, Lotus Connections R2, and its five components: Profiles, Activities, Blogs, Dogear, and Communities. This guide also covers integration with other applications, such as Lotus Sametime and Lotus Notes.
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1. Introduction

Over the past several years Web 2.0 technologies have surged in adoption and have brought about improved ways to think about our Web experiences. Many of these new technologies have gained popularity and become mainstream; for example, blogging has become an extremely popular source of information next to online news sources, Facebook has taken college campuses by storm, MySpace has become another way to promote yourself or your music, and YouTube and Flickr have become sources to share and find media beyond your living room's TV and coffee table full of photo albums.

At IBM, we have not merely observed these technologies and their adoption in the consumer market. We have applied these technologies to our own jobs and to our customers, learning in the process what is useful in a business setting. We have also deployed innovative assets from IBM Research and internal versions of many popular social software technologies over the past six years.

1.1 The evolution of IBM® Lotus® Connections

Over these past six years the technology has evolved as we determine the specific features that add business value, but the net result is they have now become an integral part of our work environments. The Web 2.0 technology yielded significant benefits to our employees, so it was a natural decision to use it to create a social-software-for-business offering, Lotus Connections, for our customers. The following is a brief summary of the evolution and use of the components delivered with Lotus Connections.

Profiles
In 1998, the IBM CIO Office’s Intranet Development team introduced a service called BluePages, a Web-based company directory that displayed basic contact information, job title, divisions, and geographies for every employee. Over time, BluePages evolved into social software that additionally shows corporate structure, skills, background information, and photographs, and was searchable by any of these fields. Employees can use the application to find people with specific skills, learn more about a person who sent them an email or a phone call, and determine the locations of fellow employees.

Today, BluePages holds 500,000 profiles and serves 3.5 million searches per week. It is the hub of user requests and of all applications authentication for IBM. Having become one of the most-used applications within the company, BluePages provides the basis for Profiles, one of the Lotus Connections services.

Communities
The Communities component of Lotus Connections is the newest of the technologies and is conceptually based on IBM’s Community Map, which contains groups of people with similar interests. When in the community, members can exchange information and ideas. People can join and leave the community as they wish since the community membership model is very easy to use.

Blogs
Intranet blogging has been going on at IBM since 2005 and was quickly recognized as an efficient way for subject matter experts to share their knowledge with a wide audience. The service has been extremely popular and, as of April 2008, there have been over 215,000 total intranet blog entries (including comments) in the past 52 weeks. There are over 50,000 registered users that make up over 25,000 tags and over 10,000 ratings. The blogging technology in use at IBM and in Lotus Connections is based on the open-source Roller code, customized and extended for internal--and now external--use.

Dogear
As social bookmarking has become extremely popular in the consumer space, IBM has extended this concept for the intranet. Although there was nothing stopping corporate users from using consumer sites to bookmark intranet pages and resources, doing so posed challenges and potential infringement of corporate data. Corporate firewalls may prevent access to these resources to anyone outside the organization, but public sharing of bookmarks could leak information in the titles, tags, descriptions, and even URLs that are visible in the social bookmarking system.
Dogear, the social bookmarking service in Lotus Connections, was deployed at IBM in 2006 and has revolutionized how employees share knowledge and has improved search results. As of April 2008, there were almost 400,000 URLs in our social bookmarking service. IBM has integrated Dogear with IBM OmniFind search in our intranet portal, increasing search satisfaction by 50 percent.

Activities
Another project brought to the Lotus Connections suite from IBM Research, Activities is a service aimed at helping individuals organize their work and tap their professional network to get their work done faster. First deployed in 2004 as Activity Explorer, this technology addresses the productivity problem of the exploding number of ad hoc projects that require dynamic teams.

Often, process-centric or top-down systems fail to capture the real work that is required to accomplish a business objective or activity. For example, in planning an event, there may be a process that must be followed, but that process does not capture the emails that have been sent, the chats that have taken place, the documents that have been used or written, the databases that have been accessed, and so forth. Activities provide a means to capture this sort of information.

1.2 Our understanding of your goals

“The rate of change has increased dramatically. Customers are demanding radical change in product innovation. Our company will need to greatly increase its capabilities to deal with these demands.”
-- Dennis Jönsson, CEO, Tetra Pak.

This striking statement is from a 2008 IBM survey of more than 1000 business leaders from many different industries and different parts of the world. A key finding: the majority of business leaders are optimistic about their company’s ability to grow. However, they are overwhelmingly stressed that growth will come only through innovation and the ability to exceed the expectations of demanding customers. They identified three areas for innovation:

- Faster development of innovative products, services, and markets
- Adoption of new business models and processes
- Improvements to operations

Business leaders have identified from where they expect their innovations to come (see figure 1). The left side of the chart shows external sources of innovation, and on the right, internal sources. They identified business partners and customer communities externally, and the general employee communities internally, as their primary sources of innovation.
Figure 1. Survey results for new sources of innovation

More than ever, businesses now recognize that success depends on empowering employees to work together more effectively at a grass-roots level, both internally with one another, and externally with customers and business partners. This is where social software comes in.

1.3 Our approach to meeting your goals
To create a sustainable competitive advantage in the face of relentless change and intense competition, leading companies are focusing on innovation. The reason is simple: innovative companies typically grow more quickly than their competitors. The challenge is to harness and act on the best ideas from employees, partners, and even customers.

Lotus Connections is the industry's first platform for business-grade social software, providing six Web 2.0-based services: Activities, Communities, Dogear, Profiles, Blogs, and a Home page. Lotus Connections facilitates the gathering and exchange of information through professional networks, provides a dashboard-like view of current projects, and connects users to like-minded communities. In addition, Lotus Connections removes the need for multiple social software applications, providing businesses with a single destination for building professional communities.

By enabling vibrant communities of employees and customers to create innovative products, Lotus Connections helps organizations exceed customer expectations and grow. It also empowers organizations to make bold, successful changes by quickly accessing the best knowledge, experience, and skills they have available. At an individual level, it helps people work smarter by connecting to communities of knowledge based on their needs, roles, and preferred ways of working.

"IDC believes that social networking will grow quickly because of the value it provides to the individual user as well as to the organizations with which they work or do business. Social networking serves as a communication platform, a discovery mechanism, a knowledge capture tool, and as a way to develop richer relationships and connections, all of which serve in a variety of enterprise capacities." "Enterprise Social Networking Takes Hold," Rachael Happe, IDC, May 2008.

All kinds of employees can benefit from Lotus Connections. For example, an investment banker requiring information about growth in the technology sector could conduct a keyword search of Profiles that
immediately produces a list of experts in the field. Within seconds, the banker could also have access to relevant bookmarks, blogs, activities, and communities created by colleagues and partners from around the world with the same expertise.

The banker then could join the company's "Investing in Technology" Community and, by doing so, discover a group of colleagues able to instantly share knowledge it would otherwise take weeks to obtain. With a click of a mouse, they engage in an instant messaging chat session and brainstorm their ideas. From there, the group creates an Activity so they can work together to reach their goals quickly and efficiently.

Lotus Connections helps businesses to:

- Find the appropriate people quickly and discover new contacts based on topics and areas of expertise:

  With the Profiles service of Lotus Connections, users can search for people by name, expertise, or keyword. Search results provide standard name, contact information, and reporting structure details, along with links to the blogs, communities, activities, and bookmarks associated with the person being searched.

- Bring people together with common interests and assignments:

  With Communities, users can collaborate with colleagues across their organization that share common interests or work objectives. Community members discuss relevant issues, conduct polls to gather information, and share resources. Anyone within the organization or selected partners from outside an organization, such as customers, can join and participate in a community.

- Create an interactive community with external and internal audiences, sharing knowledge and opinions:

  With the Lotus Connections Blogs service, creating and posting blogs is fast and easy. Searching for information on blogs is simplified with integrated blog searching tools. In addition, users can automatically track posts from key blogs through Atom syndication format feeds.

- Access and share information that is deemed important by others and discover new people and resources with similar interests:

  Dogear, the social bookmarking service of Lotus Connections, enables users to tag and share bookmarks. Users can find pre-qualified information by using key word searches or by subscribing to an expert's bookmarks, enabling them to find the information they need faster and to discover social networks, regardless of organizational reporting structures.

- Organize the work and interactions associated with an Activity:

  With Activities, users have a Web-based dashboard for managing and completing tasks, in which they can easily organize, share, and collaborate on all files, instant messaging chats, email messages, and Web links associated with a given task. This enables employees to better track to-do lists and manage deadlines while incorporating best practices and knowledge from across their organization.

As your professional network grows and more social data is added, you need a way to quickly find the information and expertise that is relevant to your job or customer. The Home Page feature helps deliver a quick, filtered view of your information from the other services of Lotus Connections.
1.4 Integrating with other applications: An overview
All the Lotus Connections services provide a Web interface and simple APIs, providing universal access and simple extensibility. This is a critical feature because it lets you surface the value of your professional network in the context of business process. You don’t need to stop what you are doing to go to another place to get the information or expertise you need.

As proof of this capability, Lotus Connections includes a number of extensible integrations with the tools and applications you already use. The type and depth of integration varies with what is most applicable, given the tools and the Lotus Connections services. Also, note that all these Connectors are built with IBM APIs, which has allowed our partners and customers to build custom solutions to meet their needs.

The integration of Lotus Connections with the IBM Lotus Notes® 8 sidebar is a powerful extension, providing features beyond the Web application via the benefits of the rich client platform of Notes.

Activities and Profiles naturally integrate with IBM Lotus Sametime®, providing the ability find related Activities or save a chat directly to an Activity or Community forum without leaving the chat window.

The IBM WebSphere® Portal integration allows all the services to be added to a WebSphere Portal page or composite application. The wiring and parameters supported by the Lotus Connections portlet allow the contents to be filtered by service, tag, user, and other properties. For example, a composite application that manages a particular process might include the Lotus Connections portlet showing only Activities with a particular tag, enabling the use of activity-centric computing specifically targeted to the application at hand.

The Profiles contextual business card lets you surface Profiles information easily within IBM Lotus Quickr or any application. Now when you’re viewing a document within a Quickr space, you can easily identify who the author is and pivot to their profiles page, blog, bookmarks, communities, or any activities you share.

Universal and consistent support for feeds in all the Lotus Connections services allows your favorite feed reader to connect to any or all of the services, showing, for example, a feed of new entries to your high-priority Activities, another feed off a colleague’s bookmarks, and another off new blog entries with a particular tag.

There are a variety of other integration points, such as the unified bookmarklet for posting links as bookmarks, activity, or community entries. In addition, the simple Atom-based Representational State Transfer (REST) API makes it simple to create all sorts of mashups.

1.5 Lotus Connections is built on a service oriented architecture
Figure 2 shows how Lotus Connections conforms to a service oriented architecture (SOA). Each service is a set of EAR files that are installed on a Web server and that store data in a relational database. All the requests are pure HTTP requests, and the dominant means of access is via a Web browser.

The Lotus Connections services are standalone Web applications that are accessible not only through a browser but also through feed readers. Feed reader data is reverse proxy cacheable, so the application doesn’t need to regenerate the feed every time the client polls. The proxy server stores the page, asks if there are any changes, and provides a timely response.
2. Profiles
Profiles is a directory of the people in your organization along with information you need to form and promote effective networks. In addition to basic information captured in a business-card format, Profiles can catalog user-provided skills such as, for example, technical expertise, familiarity with foreign languages, and areas of interest. Profiles facilitates collaboration by helping you find and contact the right people fast.

2.1 Overview
Use Profiles to let people in the organization know who you are, what you do, what projects you are working on or have worked on, what tools and technologies you use, what problems you are currently trying to solve, and what you are reading or writing.

You can also use Profiles to discover who in the organization is working on projects like yours or is finding solutions to similar problems, and what resources they are using to simplify their jobs. Determine who your coworkers are, what their interests are, what skills they have, what they are publishing or reading, and get in touch with them.

Figure 3 shows a sample Profile and the type of information contained therein.
2.1.1 Main middle section

Profile header. Includes basic contact information such as job title and location (these defaults are configurable). The header also includes a photograph of the profile owner. Hovering over the name of the person in the profile brings up the business card, including links to all the Lotus Connections data this person may have contributed:

- Activities: Lists the Activities that you and the Profile owner share.
- Blogs: Lists the blog(s) for which the Profile owner is an author.
- Bookmarks: Lists the public bookmarks that the Profile owner has created.
- Communities: Lists the public communities to which the Profile owner belongs.

The business card is configurable to support additional custom links. Also in the header is an optional name pronunciation link. Clicking this link plays a recording of the person's name spoken with their pronunciation. When browsing others' profiles, you can also add someone to your list of colleagues by clicking the "Add to my colleagues" link. Finally, in the header, there is a business card icon that lets you export the person's contact information as a virtual card file (vCard).

Contact info. Includes the typical information you would find on a traditional business card, such as name, job title, company, location, telephone numbers, and email addresses. The information can be mapped to a corporate directory, human resources system, or other database and be kept in sync. The fields displayed in this section are also customizable and include specialized field names and values determined by the organization. Presence awareness can be enabled and shows in this area of the profile. Also, this section can be collapsed.

About Me & Background. Profile owners can provide any self-descriptive information they wish to share, including current work experience, technical skills, languages spoken, and interests. Background can be used to describe past work experience and education. These collapsible sections can be easily updated using the rich text editors provided, which allow images, links, and other rich text to be displayed.
2.1.2 Right and left column sections
To the right and left of the profile are widgets that display parts of the Profiles applications. The default widgets included with profiles include a reporting structure, recent colleagues, links, and tags. Organizations can also create their own widgets to add to the profile and choose to remove or rearrange the default widgets.

Report to chain. This widget shows a summary of the profile owner’s reporting structure, including links to the following view options:

- Full report-to chain: Shows the Profile owner’s position, from the Profile owner up to the top of the organizational chart.
- Same manager: Shows those people who also report to the Profile owner’s manager.
- People managed: Shows the Profile owner's position within the full organizational chart, including people managed by the Profile owner.

Recent Colleagues. This widget shows the profile owners’ most recent colleague acceptances. Clicking on “Show All” takes you to a page showing the full list of colleagues. Owners looking at their own page of colleagues can take actions such as modify their list or send mail to selected colleagues.

My Links. Profile owners can add link titles and URLs to this section. The favicons for LinkedIn, Facebook, and Flickr will display, although any URL can be added here. Owners can give a title to the URL (for example, “My Facebook Profile”) and the http:// address for the link. Any number of links can be added.

Profile Tags. Tags are keywords defined by the Profile owner to identify skills, areas of interest, or work activities. These tags are surfaced in search results with the other profile information.

Social Tags. Social tagging is an optional choice for deployments. With social tags, the standard “Profile Tags” widget is replaced with a widget that allows profile owners to tag each other. When tagging each other, the tagger’s name is associated to the tag given, showing who tagged whom and with what tag.

2.2 Highlights

2.2.1 Profile types
Organizations can create one or more profile types. These types describe which fields to display in the Contact Info section and which profile widgets to include on the page. For example, a “temporary employee” could be one sample profile type, which may include different fields for contact information (for example, Agency Hired From) and may not include a reporting structure widget. Administrators can define what profile types to include and what information to associate with them.

2.2.2 Establish a colleague network
Click one of your own Profile tags to quickly find other people who share your interests or who may be working on similar projects. People with whom you share common tags are likely to be good resources for you.

After you obtain their contact information from their Profiles, you can also add them to your network. Adding them to your network makes it easier for you to stay in touch with them and allows you to receive information about their activity within Lotus Connections through your personalized Home Page, which is discussed below in Section 7.

2.2.3 Tagging your Profile
A tag is a descriptive keyword that you or others assign to your Profile to identify your work activities, skills, or interests—similar to the other services described above. The tags you assign to your profile are
displayed in the Profile Tags tab of your profile. Tags describe what you do and what you care about, so when you create tags, choose keyword(s) that represent your true interests or areas of expertise.

2.2.4 Publicize your skills
By assigning tags to your profile, you describe your skills, job role, interest, and education to others in your organization. People can find you by performing searches on tags. For example, if someone is looking for an expert on financial planning, they may search on tags like “finance” and “financial-planning”. You choose the tags by which you want to be known, therefore publicizing the skills you wish to share.

Lotus Connections includes a pop-up business card wherever a person’s name appears (see figure 4). This business card includes basic contact information and links to the Connections services. The card is extensible to include links outside the services as well and can be embedded in any Web applications in which person names may appear, for example, articles on your intranet or Web views of databases.

Figure 4. Pop-up business card embedded in your own applications

2.2.5 Performing searches
Let’s now review the features of the Search Profiles tab of Profiles, as shown in figure 5.

(1) A “quick search” searches against a single field in the directory profiles. To run a quick search, select “Find by name” or “Find by keyword”, which searches based on tags or associated information.

(2) An advanced search narrows the search by letting you search specific profile fields at the same time. It’s a more-targeted search than a quick search, allowing you to search by phone number, address, email, or other fields in the profile.
Search results are displayed in the People tab (see figure 6). You can view the business card of a person returned by a search by clicking the down arrow that displays beside their name.

If Communities is enabled and you search by a tag and related information, you can click the Communities tab to open the Communities search results view, in which relevant communities will be displayed.
3. Communities
Lotus Connections provides tools for finding, joining, and watching communities, so users can see what's new, popular, or active. In a community, you can work with people who share a common interest, responsibility, or area of expertise. Communities can discuss topics in a forum and can reference and tag Blogs, Activities, and other resources via bookmarks and feeds. Communities can also integrate with external applications to provide a seamless user experience with the necessary flexibility.

3.1 Overview
You can easily create a community by clicking the “Start a Community” button. Required information includes a community name. All other information is optional, including description, tags, photo, and members. By default, communities are public, but you can also elect to create a moderated or a private community, defined as follows:

- **Public Community.** Anyone can join and participate. All information shared is public.
- **Moderated Community.** Anyone can request to join, but the owner must approve membership before the requestor is accepted and can participate. All information shared is public.
- **Private Community.** Only the owner can add members to the community. All information is closed for only the members to view. Private communities are unlisted.

Communities provide an excellent way to connect people across organizational silos and physical boundaries. Use the tools provided with the communities service to reach out, make connections, get organized, and start sharing information. As a community owner, you can invite others to join and to manage the content and membership for the community.

3.2 Highlights
Let's review some of the community highlights, as shown in figure 7.

Figure 7. Highlights of the All Communities page

(1) **All Communities** and **My Communities** tabs. View all the communities in your organization or just those to which you belong, using these navigation tabs.
(2) **View Communities.** View the most recent or most popular communities, or browse them alphabetically.

(3) **Start a Community.** Start a community quickly by providing a name, description, and tag(s).

(4) **Browse by tags.** Browse the community content by tags, filtering on frequently used tags as needed.

(5) **Add a feed reader.** Subscribe to a community outside the Web page by adding the feed to your feed reader.

Whether you are joining a community or starting one of your own, you can use the above features to get the most out of your experience.

Now let’s touch on the highlights of a sample Community about Worldwide Events (see figure 8).

**Figure 8. Highlights of a sample Community**

- **Overview.** This view aggregates into one view the latest content added to the community. The overview page is divided into sections containing the latest updates.

- **Members.** This view shows the list of members in the community. Use it to add or remove members from your community. All members of the community can see the list.

- **Forum.** Members can post new topics and start a discussion for each topic. Discussion content can include images, links, and rich text.

- **Bookmarks.** Members can add bookmarks to Web sites of information or feeds to the community.

- **Feeds.** Members can add RSS or ATOM feeds to the shared feed reader.

- **Associated applications.** Communities can include external applications that are aggregated into the community, with Administrators controlling which applications to include as options:
• **Confluence wiki.** As you are creating a community, you can create a Confluence wiki and associate it to the community as well. When you associate the wiki, all membership in the wiki will respond to the fluctuating membership of the community automatically, so that community owners don’t need to manage membership in more than one place.

The wiki’s pages are displayed as subsections on the community Overview page, and expanding each subsection shows the rich content from the wiki page. Clicking a page or the “Confluence wiki” link in the navigation takes you to the wiki page directly from the Confluence server.

• **Socialtext wiki.** As you are creating a community, you can create a Socialtext wiki and associate it to the community as well. When you do this, all membership in the wiki will respond to the fluctuating membership of the community automatically, so that community owners don’t need to manage membership in more than one place.

The wiki’s pages are displayed as subsections on the community Overview page, and expanding each subsection shows the rich content from the wiki page. Clicking a page or the “Socialtext wiki” link in the navigation takes you to the wiki page directly from the Socialtext server.

• **Sametime Advanced Communities.** Each community can also have an associated community for real-time collaboration by use of Sametime Advanced’s Broadcast Suite. The real-time community bases its membership list on the members of the Connections community, and any broadcast messages started from that community channel can be saved to the community discussion forum, even after the real-time communication is complete.

**Tagging.** Use tags to assign descriptive keyword(s) to your community. Tags are useful for searching for a particular type of community or filtering the list.

**Graphics.** Import a graphic to give your community a unique look.

**Important Bookmarks.** Add important links to the home page of the community to keep the group updated on important information.

### 4. Blogs

Blogs are a key tool for social networking, providing a medium to share knowledge and build networks and relationships. Blogs can be used for many different business purposes, ranging from sharing product direction, asking and answering questions, gathering feedback, and learning best practices, just to name a few. Other features of blogs are explained later, including:

- Creating a group blog in which you and others can post information.
- Creating blogs using a theme and switching to different themes at anytime.
- Using the Blogs home page as a source to view hot blogs and popular comments available across the entire organization.
- Rating blog entries, to find information that others have found especially helpful.

#### 4.1 Overview

Blogging lets you share information and events such as a new product launch. Blogs are growing widely with Web 2.0 technologies, enabling you to inform your colleagues, business partners, and customers about topics that range from experiences at a trade show to tips on using new technology. In short, blogs are a fast, effective way to “get the word out.”

The Blogs home page consists of a dashboard-type visual display of the blog service of Lotus Connections (see figure 9). It provides a snapshot of what blog entries are active and allows you to
search quickly by tag or full text index to find information that suits your needs. Blogs are a flexible medium for communicating within an organization or across business partners and customers.

Figure 9. Blogs home page

Let's review some highlights in the figure above:

(1) **Latest Blog Entries.** Shows an aggregation of blog posts that you can sort by date, title, recommendations, comments, and visits. You can view in a list view or detailed view, where each entry displays the entry title, tags, blog name, date posted, number of recommendations, number of comments, and author.

(2) **Featured Blogs.** View featured blog entries here.

(3) **Active Tags.** Tagging is an important aspect of social software and of Lotus Connections—a fact that's been noted throughout this document—and these same characteristics can be applied to blogs. Though tags are optional with blog entries, they are recommended as a method to improve searching and build folksonomies. The tagging in blogs makes the body of information increasingly easy to search, discover, and navigate over time.

(4) **Most Recommended.** Shows a list of blog entries with the highest ratings.

(5) **Most Commented.** Provides a list of blog entries with the most comments, letting you share your thoughts and opinions with your colleagues, business partners, or customers.

(6) **Most Visits.** As blog entries have become a mechanism for knowledge sharing and feedback, users want to be notified or "pushed" information that is relevant to the blogging service. Hot blogs lists those entries that have been viewed the most.

**4.2 Highlights**

Let's now review some highlights of blogs:
Create a blog. Simply click the Start a blog button in the upper-left-hand corner of the Home page, and give it your own title, such as “Web 2.0 Technology,” and a description for your readers. As the blog owner, you can also change your theme. The theme is the collection of templates that controls the look and layout of the blog.

Rich text editor. Posting a blog entry gives you complete rich-text-editor ability to insert hyperlinks, images, horizontal rules, and bullets. The available text attributes include color, bold, italic, underline, and strikethrough.

Uploading a file to a blog. Use the file upload utility to enhance your blog with graphics, podcasts, or various other files. Manage your uploads and easily add new or existing images to your blog entry as shown in figure 10.

Figure 10. Add an image dialog box

Change the look and feel of your blog. It’s your blog, so you have a variety of theme options with which you can change its look and feel. For example, you can change the color scheme and mash up other Lotus Connections services like Dogear.

Team blogging. A blog can have a single author or allow for multiple contributors. As blogs give you the tools to collect and share input, team blogging allows a collection of authors to provide their ideas and thoughts.

Flag a blog entry for review. If you’re worried that some bloggers may post internal or private information, you can now flag those blog entries and notify the appropriate people to take action, as shown in figure 11.
5. Dogear

Dogear lets you save, organize, and share bookmarks, and also reveals bookmarks that have been qualified by others with similar interests and expertise. The tagging is a Web 2.0 capability offered by all the Lotus Connections services. Tagging replaces fixed, top-down taxonomy classification with bottom-up "folksonomies," from which emerge superior categorization and searching capabilities--the "wisdom of crowds" aspect of Web 2.0. The tagging in Dogear is intended to make a body of information increasingly easy to search, discover, and navigate over time.

5.1 Overview

Dogear (a.k.a, social bookmarking) lets you store Web sites or any addressable URL to a central location. By storing bookmarks to a central location, you can access your bookmarks from multiple computers and browsers while maintaining the same user experience. Since Dogear is based on this central location, the service provides added value by allowing users to tag and describe the resource that is helpful when sharing this information with others.

When tags are used to describe a resource, a level of credibility is added to that resource when returned within a search result set, since someone else tagged that resource based on their description. Dogear opens the flow of information by letting you subscribe to tags or to people so you can receive "just-in-time knowledge." Other features of Dogear that are discussed later include:

- A central spot for storing and organizing bookmarks across workstations.
- A way to publish some or all your bookmarks so that others can see your collection of content.
- Tags that let you identify bookmarks with a keyword that you choose. Tags make searching for and sharing bookmarks easier.
- Contact information about bookmark owners is provided so you can locate and connect with other users.
- Users notified of interesting bookmarks

**Why would I store bookmarks to a central location?** Dogear enables users to import into a single location bookmarks that are stretched across different browsers. The information is stored on a server, making it easy to access, manage, and update.
For the many users who are forced to upgrade hardware and software regularly, Dogear alleviates the need to move files between computers. Storing your bookmarks on a central server also lets you share content that you find interesting or critical to your job. For example, if you are in someone else’s office or if you have multiple machines, you can easily find, share, and collaborate on information stored on the central server.

How does it work? Dogear easily integrates with your browser to be able to store bookmarks. Whether browsing the Internet or Intranet, you can have the same experience when bookmarking Web sites.

Tags. When you decide to bookmark a Web site, you are presented with the New Bookmark dialog box (see figure 12). The Title and URL are pre-populated, but you can modify these, and you can add your own rich text Description or just copy content from the Web site. Optionally, you can also store this bookmark in a Community or Activity.

Figure 12. New Bookmark dialog box

Dogear provides recommended, popular, and recent tags to help you build the folksonomy. This helps users understand what others are using when they visit the same page with respect to referencing it for future use. The tag type-ahead feature presents a dialog box of previously used tags within the service. Additionally, you can see how many times a tag has been used, to aid you in tagging and contributing to the folksonomy, so common tags are used across the organization.

5.2 Highlights
To build synergy among the services, a user-friendly Web interface is provided for Dogear, as shown in figure 13.
(1) **My Bookmarks.** Dogear lets you store any Web site you like and provide a description, title, and tag(s) associated with it. The My Bookmarks page is specific to you and allows you to view your most recent Dogear bookmarks. If you do not want some of your bookmarks to be shared and visible to other users, Dogear has the option to mark bookmarks as private.

(2) **My Related People.** Dogear can find related people within the service that have bookmarked the same URLs as you. So you can discover other people with similar interests and view their bookmarks to reveal information and Web sites you have not visited.

(3) **Search for people and information.** Storing bookmarks is not a new concept; however, now you are able to search for both shared and private bookmarks from the same location, yielding better information management and improved productivity. Using the Dogear service, you can search within your bookmarks or all shared bookmarks, and the use of tags to describe a bookmark makes for quick and improved search results.

Since Dogear lets you bookmark both external and internal Web sites, searching also returns both internal and external results. For example, a search on “finance” returns internal as well as external bookmarks related to finance.

(4) **Tagging.** Tags, a fundamental aspect of Web 2.0, are one or more keywords you want to associate with a resource or, in this case, a bookmark. The bigger and bolder the font, the more often that tag word has been used (for example, “electronics” in figure 14). If you hover over the word, it will provide a pop-up with the current number of times that tag has been used.
Dogear displays tags associated with each bookmark, if available (tagging is optional, but recommended). Lotus Connections also provides tag clouds within each of the services as a visual depiction of content tags. Tag clouds are prevalent throughout Dogear as you can view your personal tags, other people’s tags, associated tags, and all tags within the Dogear service.

Tagging is designed to be dynamic and informative, and the Dogear service allows you to manage your tags. As new buzz words, product name changes, and new information becomes relevant to a bookmark, you are able search and replace tags as well as delete them by using the Tools link.

5.3 Other features

What about all my local bookmarks? With Dogear, you can import your locally stored bookmarks and automatically create tags based on folder names, if you have created folders for your favorites. For instance, if you have a folder called “connections,” when you import the bookmarks contained in that folder, Dogear will automatically tag them as “connections.” You can also modify the bookmarks later to remove or add any additional tags. To import your local bookmarks, select Tools > Import Bookmarks.

Who’s reading my bookmarks? Now that you are using Dogear to store your bookmarks in a central location, people within the organization can find your content. Suppose some people revere you as an expert on certain topics based on the information they see you have bookmarked. That’s a case in which they may want to use the “Watchlist” option, which enables them to continually watch as you bookmark new information. In addition, you can see who has watchlisted you (see figure 15).
Is there anybody else like me? Sharing information and drawing correlations with other people and information is a driving force behind Lotus Connections. Dogear compares the Web sites you have bookmarked across all users in the system to display a list of people with which you are associated. With this list you can view other people that are bookmarking the same Web sites and could use it to start a Lotus Connections Community around a specific topic.

6. Activities

Activities help you organize your work, plan next steps, and easily tap your expanding professional network to help execute your everyday deliverables faster. Activities provide a more natural way to get work done, unlike current document- and tool-centric approaches. The Activities approach is to let your work happen and capture the *ad hoc* collaboration and artifacts as they occur. Thus, it’s easier to manage one's daily work with others and to discover and capture best practices in a simple manner.

6.1 Overview

An Activity is the collection of relationships between people, the materials with which they work, their communications, and the processes they use to achieve a common goal. Rather than complete work in several disparate and disconnected tools, activities bring information from a variety of tools and places together to be shared by the group achieving the goal.

Simply put, Activities are tasks that require coordination and collaboration with others to complete. For example, an activity can be:

- driving a sales process to close
- preparing for an important meeting
- writing a report for a client
- hiring a new employee

An Activity is a way for you to organize your work and collaborate with others. You can post messages, share files and Web links, and create to-dos in Activities. With extensions to Lotus Notes and Sametime, and Microsoft® Outlook, Office, and Windows®, you can add information from these different tools, such as emails, instant messages, or files, easily to an Activity without needing to go there. Activities also allow you to create your own custom entries based on the information you need to collect to accomplish your goal.

It's easy to share Activities with others, and you can use the Web-based Activity Dashboard to keep track of your current, prioritized, and completed Activities.

**How do people use Activities to be more effective?** Activities are a good way to improve awareness and coordination in small groups. For example, suppose you identify a goal ("create a presentation" or "resolve a software problem" or "research a topic") and create an Activity for that goal. You can share the Activity with your coworkers so you all can stay on the same page. You can post content to the Activity...
and collaborate with a variety of shared tools. When you are done with it you can mark it complete, so your Activity dashboard is always up-to-date with your current information.

Activities are also a single place in which you can bring together the various elements that are required for a task or project, including chats, documents, images, messages, and Web links, to name a few. Activities do not make you switch between the tools you use on a daily basis; instead, Activities bring them all together.

**How can I create an Activity?** Your Activity list contains a list of your current Activities and is the main page you see when you log in. From your Activity Dashboard, click the "Start an Activity" button in the top left-hand corner and complete as much information as you want (see figure 16).

*Figure 16. Creating a sample new Activity*

In the Activity, you can specify members to be in different roles, such as author, or reader vs. public access, as well as base an Activity on a template. You can find these selections by expanding the “Member options” and “Template options” sections.

### 6.2 Highlights

Now let’s discuss the Activities, To Do List, and Templates portions of an Activity (see figure 17). The first view, “Activities”, shows you your current set of in-progress Activities.
(1) **Start an Activity.** Select this button to create a new Activity.

(2) **Prioritized & Public Activities.** You can filter your list of Activities by selecting only your High or Medium priority Activities. You can also filter based on Active-only Activities (versus completed ones), Completed Activities, or Activities in the trash. To prioritize an Activity, mark it complete, or move it to the trash, select “More” next to the Activity name and choose the option.

(3) **Tags.** Activities can be tagged as well as the content within them. Use this view to filter your Activities based on a tag.

(4) **Recent Updates.** This view shows you the latest actions in your Activities and allows you to navigate to the items mentioned. You can subscribe to this view in a feed reader using the feed icon at the bottom of the list.

Now let’s look at the inside of an Activity (see figure 18).
Sections. An Activity can contain a flat list of content or it can be organized into sections. Sections are customizable by the Activity owners and, once added, are available for everyone in the Activity to use to group relevant activity content. To add a new section, click the “Add Section” button and give your section a title. Sections are optional but are excellent for managing larger Activities.

Add Entry. One way to add a new piece of information to an activity is by clicking the “Add Entry” button. In the default New Entry form that pops up, you can add a title, description, and tags to the entry (see figure 19). You can optionally add in more fields as necessary.

These fields can include a file type field, a calendar type field with a date picker, a link field for URLs, a person field for Lotus Connections person names, and a plain text field for adding any information. You can change any of these field names by clicking on the field name and renaming it.
If you find that you are using a custom entry repeatedly, you may wish to save that as a set of information others can use. You can do this by going to your newly created entry in the Activity and clicking “More Actions” – “Create another like this”. This prompts you for a name, and after you name it, the entry will appear in the list of new entries.

**Add To-do Item.** Using To-dos, you can create action items as you are working through an Activity, assign due dates to them if you wish, and even assign ownership. They can help augment and assign work to the people involved in the Activity. All the to-dos across all your Activities are collected into one view for you to act on.

**Add Members.** You can share Activities with other people directly from the “New Activity” form or within the Activity itself. The type-ahead feature lets you find people within the organization (see figure 20). If you cannot locate the person with which you want to share the Activity, you have the option of adding them using their email address. You can add multiple people to an Activity at the same time by using a comma-separated list.
You can also set up Public Activities. Public access (read only) makes the Activity completely public for anyone to view but not edit. Public access (without the read only) allows anyone to add content to the Activity and edit their own entries.

There are three different types of roles—Owner, Author, and Reader—with which you can provide different levels of access to content within Activities. Owners have the ability to view, edit, and delete all the Activity objects. Owners can also add people to the Activity in any role. Authors have the ability to view and add objects as well as to edit and delete their own entries. Authors can also add people to the Activity in the Author or Reader role. Readers have the ability only to view.

Templates: **Reuse existing knowledge.** If you find that you do the same type of Activities repeatedly (for instance, creating a patent or delivering a customer briefing), you can create an Activity template (see figure 21) with all the content you need to complete the task (a To Do list, some Web links, etc). You can then instantiate a copy of the template to get started with a "pre-filled" Activity.
Using the template, you can structure the Activity as you see fit without imposing deep structure and you can use placeholders, tags, and even add members just as you would with a regular Activity.

Others can then find your Activity template and create a new Activity from it, saving considerable time. The ad hoc communications that occur during the Activity can be added to the Activity naturally without affecting the template.

### 6.3 Other features

**Change the priority of your Activities.** Prioritizing Activities enables users to surface the most critical Activities on their dashboard. You can set High Priority and Medium Priority (see figure 22) on Activities simply by clicking "More” next to the Activity in the main list, or under “More Actions” in the individual Activity, and choosing the appropriate priority from the list.

You can also set the Activity back to the default (Normal), tune Activities you no longer wish to see in your main list, create templates of Activities, copy Activities, Edit Entry Templates, or even add Related Activities from this menu.

![Figure 22. Setting the priority](image)

When an Activity is completed or you no longer need to track it in your main view, you can use the "Tune Out" command to move the Activity out of your main view and into your "tuned out" list. Even though an Activity is set to “tune out,” you are still able to access and post information, and you can always select the "tune in" option so that the Activity reappears in the current Activities list.

### 7. Home Page

As your deployment of Lotus Connections grows over time and with use, more and more information will be available for you to discover. To help focus your attention on the information most relevant to you, there is a new capability in Connections called the Home Page. The Home Page delivers the most recent information within or outside your network to help you stay informed on what’s new.
7.1 Overview
The Home Page is based on Lotus mashups technology and allows users to create a custom view of information relevant to them. The Home Page includes five widgets, one for each of the Lotus Connections services, that can be added, removed, or rearranged on the Home Page:

- **Profiles widget.** Gives you the option to display your own business card or show people within your colleague network. This view shows your most recent colleagues and their latest contributions to Lotus Connections. You can scroll your list for more colleagues and can also do a basic person search from this widget on Name or Tags.

- **Activities widget.** Shows you a calendar in which dates you have assigned to-do items that are due appear in shaded blue, and clicking on the date opens a pop-up view with the to-do item. The widget also shows you the latest responses to your posts, new entries in your high-priority Activities, and a list of all your Activities. Clicking on any of these links displays a pop-up view in which you can browse the information before clicking through.

- **Communities widget.** Toggles between your communities and all communities, and displays those most recently updated and by whom. You can also scroll for more entries.

- **Blogs widget.** Currently shows the most recent blog entries and author, and is scrollable to show more.

- **Dogear widget.** Can display the most recent bookmarks in your organization, your most recent bookmarks, the most popular bookmarks, and bookmarks that are on your Watchlist.

The Home Page can also include widgets from external sources. Administrators can take widgets provided by other Web sites and embed them into the Home Page by wrapping them in code that interacts with the Lotus Connections Home Page. For example, Google™ Gadgets, Yahoo!® Maps, and Yahoo Answers can be added to the Home Page as optional widgets for deployments to leverage (see figure 23).

*Figure 23. Example Home Page*
7.2 Highlights
The Home Page is also the central point for viewing people, tags, and content across all of Lotus Connections. In the Search tab, you are able to search across all the Connections services and retrieve the results in one consolidated view.

The search technology is based on a social search project from IBM Research that takes into account all the social relationships established in Connections to tailor search results based on social data. The search shows the closest matches highlighted in grey and subsequent matches below. Using the content links in the upper left-hand corner of the Search page, you can filter the search results based on the Lotus Connections service (see figure 24).

The search also shows related tags and people. A tag cloud from across all the services is constructed based on the search terms and the tags most frequently appearing in the search results. You can filter the search view based on these tags. Similarly, a related People view appears showing the names and pop-up business cards of the people who contributed the most content related to the search terms.

Figure 24. Search results

8. Extending Lotus Connections to other applications
Lotus Connections can be easily extended because the data supports a REST-style, HTTP-based API with XML, JavaScript, and HTML-formatted output. Thus you can leverage the data and content within Lotus Connections to existing desktop and browser-based applications. Whether you are an amateur or professional developer, these open standards provide the access to build integration inside your organization’s applications.
8.1 Integrating Lotus Connections with Lotus Sametime using Activity plug-in
Activities are designed to provide the tools to organize your work so as to best complete your goals. Often, information contained in emails or instant messages are relevant to a broader community and can contribute to completing a goal you may be working toward as an Activity.

Instant messaging can be a critical application for completing an Activity. While Lotus Sametime provides for group chats, often the contents of the chat should be distributed or shared among all members of an Activity. To that end, the Activity plug-in lets you add a chat to a new or existing Activity (see figure 25) and provide a name and tags.

Figure 25. Add Chat to Activity dialog box

8.2 Integrating Lotus Connections with Lotus Notes 8 using Activity side shelf
Email messages are just as important as instant messages and sometimes need to be shared among all members of an Activity. The Activities side shelf for Lotus Notes 8 (see figure 26) lets you drag and drop an email message to an Activity and display all your Activities. Additionally, you can display the members of the Activity or sort the content in a list view, outline view, or To Do list. The Activities side shelf for Lotus Notes 8 requires the Activities service that is part of Lotus Connections.
8.3 Integrating Lotus Connections with WebSphere Portal

WebSphere Portal provides core portal services that aggregate application and content, enabling them to be delivered as role-based applications or portlets. All five Lotus Connections services can be deployed to WebSphere Portal. Using the multi-service portlet, you can switch between the Lotus Connections services, allowing the data to be surfaced through messaging, collaboration, business applications, and more in your environment (see figure 27).
You can also use the Lotus Connections multi-service portlet more than once on a WebSphere Portal page and can customize each portlet to your needs; for instance, default Activities to view your ToDo’s, or Dogear to view your Watchlist.

The Lotus Connections portlet can also be locked down with an administrative setting so the portlet cannot switch between services or views when, for example, an administrator may want to have a company information portal page. That page could consist of a company profile, company stock, company news, with company-related bookmarks and blogs to be added, as shown in figure 28.

**Figure 28. Integration of WebSphere Portal and Lotus Connections**

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### 8.4 Integrating Lotus Connections with Lotus Quickr

Lotus Connections and Lotus Quickr integration allow you to extend the value of team spaces, personal file sharing, and social software. You can bookmark any page within Quickr to the Dogear service or even add that page to a community or Activity. You can also extend the Profiles card to contain a link to a user’s personal file library in Quickr Entry.

Figure 29 shows how you can leverage the profiles service in Lotus Connections to surface that Profiles card when you see a name within Quickr.
8.5 Integrating Lotus Connections with Microsoft technologies

Lotus Connections can integrate with Microsoft browser-based technologies and client applications. Microsoft Office users can now easily post a document, spreadsheet, or presentation to a new or exiting Activity to collaborate with colleagues. Using Microsoft Word, you can record notes and save them to an Activity as To Do’s, or even create your next blog entry and easily upload that to your Connections blog with the simple click of a button.

You can integrate Lotus Connections with Microsoft SharePoint as outlined in the developerWorks article titled “Integrating IBM Lotus Connections with Microsoft technologies.” Also discussed in that article is how to provide awareness in Profiles using Microsoft Office Communications Server, as shown in figure 30.
Microsoft Outlook users can also take advantage of social networking capabilities. In addition to using the native feed reader in Outlook to subscribe to the feeds within Lotus Connections, users can add an email to a new or existing Activity to better manage their workload.

Within Outlook, with a simple click of a button, you can surface an email sender’s Profile card to quickly learn more information about the sender and even go directly to that person’s blog or social bookmarks in Lotus Connections (see figure 31). Using the Microsoft Outlook plug-in for Lotus Connections, you can also search all five services of Lotus Connections.
8.6 Integrating Lotus Connections with other applications
Now let’s look at integration with some other applications.

8.6.1 Using feed readers to view Lotus Connections content
Since Lotus Connections is based on open standards and is extensible with a REST-style HTTP-based API and support for ATOM feeds, you can surface the content in your favorite feed reader. Lotus Connections generates ATOM-based URLs that let a variety of software programs check for updates via feeds (see figure 32). These feeds can then be downloaded by Web sites that syndicate content from the feed, or by feed-reader programs that allow Internet users to subscribe to feeds and view their content.

Figure 32. Sample ATOM-based URL
http://connections.renovations.com/dogear/atomFeed?author=dadasma

For instance, Frank Adams wants to stay current with all Ted Amado’s recent bookmarks. To do this, Frank just needs to add the ATOM URL for Ted Amado to his RSS Feeds such as Sage (see figure 33).
8.6.2 Lotus Connections mashups

By leveraging the extensibility of Lotus Connections, organizations can mash up their existing applications and Web sites. For example, the Dogear service provides code snippets at the bottom of the Web interface in the “Add to your site” menu option (see figure 34).

Figure 34. Viewing a Dogear code snippet

So you can embed a view of the current Dogear page in your own Web page by copying and pasting the code snippet into the HTML source code of your page (see listing 1).

Listing 1. Code snippet

```
<script
  language="javascript"
  type="text/javascript"

```

Then, this code snippet, generated from a Dogear tag search on “java,” can be used to build a mashup on a Java™-related Web site to include recent social bookmarks that have been tagged with “java” (see figure 35).
9. Atlas for Lotus Connections

Atlas for IBM Lotus Connections is a social networking application that unlocks the valuable business intelligence of "who knows what?" and "who knows whom?" residing in an organization. Atlas enables users to find experts, communities, and networks in companies through data mining, information retrieval, and social network analysis techniques.

This suite helps users manage their personal networks and reach out to their extended network (the friends of their friends) to find and access expertise and information. Atlas extends the value of Lotus Connections by providing:

- Enhanced expertise location across the organization
- Enterprise social network visualization
- Personal social network visualization

Components of the Atlas suite include:

My Net. Understand and capitalize on the value of your personal social network. My Net is a personal social capital management tool that automatically creates a visualization of your personal social network. It also shows a colleague's potential social network value to you by showing you the people they could connect you to, along with their organizational and geographical distribution.

Find. Locate expertise, expand your social network, and build awareness of expertise to facilitate knowledge sharing. Find is an expertise search engine that shows for a given topic a ranked list of people with the desired knowledge along, with the shortest social path to reach that person. Search within the company or by business division, geography, or degrees of separation within your extended social network.
Reach. Display skills description, community membership, and public knowledge-sharing activities found in blogs, forums, and social bookmark tools. Reach helps you decide who is the "best" person to approach and how to get an introduction by showing you the people you have in common and social paths to a colleague.

Net. Visualize the social network of a formal organization, community, or group. Net is a social network visualization and analysis tool that shows for a given topic the linkage among experts or the visualization of a formal organization. It can be used to find alternate experts, identify key influencers and brokers, or understand organizations.

10. Lotus Connections Solution Catalog

The Lotus Connections Business Solutions Catalog expands the social software ecosystem, allowing partners and customers to post plug-ins and services that help you expand your investment with Lotus Connections. The solutions catalog is where you can go and download plug-ins for Lotus Sametime, Microsoft Office, RIM® BlackBerry® (see Figure 36) and more. If you've created a unique solution related to Lotus Connections, you can post your solution on the catalog.

Figure 36. BlackBerry application for Lotus Connections

11. Conclusion

To create a sustainable, competitive advantage in the face of relentless change and intense competition, leading companies are focusing on innovation, capturing and deploying the best ideas from employees, partners, and even customers. IBM Lotus Connections speeds growth and unlocks the collective knowledge base within and outside an organization. Lotus Connections is the industry's first platform for business-grade social computing, helping organizations become more agile and execute faster.

12. Resources

Learn

• Introducing Lotus Connections for Partners:  

• IBM Lotus Connections: Enhancing productivity with social computing:  

• Integrating IBM Lotus Connections with Microsoft technologies  

Discuss

• Lotus Connections forum:  
  http://www.lotus.com/ldd/lcforum.nsf

• Lotus Connections deployment wiki  
  http://www.ibm.com/developerworks/wikis/display/lotusCollaborativeDocumentation/Home

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