



IBM Software Group

IBM Lotus Quickr Customization

Making a place your own

An IBM Proof of Technology



Agenda

- What is Lotus Quickr Customization?
- Lotus Quickr Architecture
- Basic Customization
 - ▶ Basics
 - ▶ Themes
 - ▶ Forms
- Enhanced Customization
 - ▶ PlaceBots
 - ▶ PlaceTypes

What is Lotus Quickr Customization



- **Create custom forms for simple workflow or project-specific needs (can use MS Office)**
- **Designate existing designs and content as templates for future places: re-use best practices**
- **Change the look and feel to create a unique sense of community**

What can you customize in Lotus Quickr

- Change existing place objects or create new place objects with IBM® Lotus® Notes® and IBM Lotus Domino® Designer.
- Perform a wide variety of actions on places using XML to access the IBM Lotus Quickr™ Java™ API.
- Automate certain tasks in places by writing agents, called PlaceBots, which run in places.
- Customize the look and layout of places to make them fit your enterprise.
- Use an existing place as a template, called a PlaceType, with which you can create new places containing the same characteristics and customizations.



Lotus Quickr Architecture Overview



- Lotus Quickr services for Lotus Domino is implemented using core Domino Technologies
- Lotus Quickr also uses a subset of the Domino/Notes security and authentication model to manage access to a place.
- There are relations between Lotus Quickr objects and Notes Domino Objects
- You can use the Notes client and Domino Designer to view, customize, and create new objects in a place.

Example: Objects Relationships

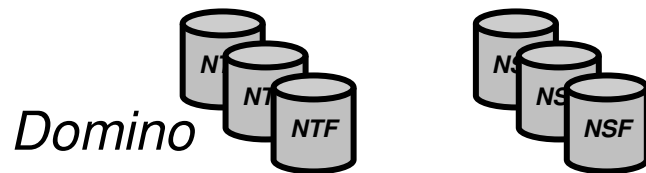
- A place in Quickr corresponds to a File System Directory
 - ▶ Place consists of 3 or more .nsf files
- A room is a Domino database
- A folder is a Domino folder or view
- A place type represents a database template
- For a complete list review the InfoCenter, the Developer's guide, and the Best Practices wiki.



* - Requires separate purchase & supported after initial Lotus Quickr release

Lotus Quickr Directory Structure

- The Lotus Quickr data is stored in a directory called LotusQuickr:
 - ▶ <Domino data directory>\LotusQuickr\AreaTypes : Templates for places and rooms
 - ▶ <Domino data directory>\LotusQuickr\LotusQuickr : Administrator places files
 - ▶ <Domino data directory>\LotusQuickr\<place> : Contains the files for a certain <place>



Places Databases

- The following databases are the building blocks to any place:
 - ▶ The place database (main.nsf)- The place database is the parent database in any place. All other databases in the place are children of the place database.
 - ▶ The Members Directory database (Contacts1.nsf) - Each place has a Members Directory database.
 - ▶ A room database (Pagelibrary.ntf)- A room database structures the contents of a particular room in a place

Basic Customization

- Basics
- Theme
 - ▶ Choose a Theme
 - ▶ PlaceType Options
 - ▶ Custom Themes
- Forms
 - ▶ Existing forms
 - ▶ New forms

Customize

As a manager of this place, you can customize it in a variety of ways by clicking on the links below.



Basics

Choose a logo, reorder the table of contents, show or hide various items, select notification, mail-in, offline, and other options, delete the place.



Choose a Theme

Change the way your place looks. Choose an overall visual theme for it from a gallery of standard themes, plus any custom themes you have created.



Forms

Create custom forms for authors to fill out. Forms can have fields such as text, pop-up lists, etc., and a workflow such as approval cycle or editor-in-chief.



PlaceType Options

Use this place as a template for future places! Choose whether this place can be used as PlaceType, and which of its features to include in future places based on it.



Custom Themes

Create custom themes for your place, to give it a new layout and visual style. Upload new custom themes, and edit or delete existing custom themes.



PlaceBots

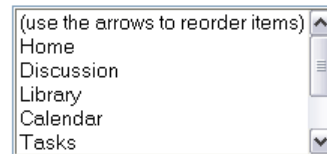
Customize how your place operates by creating PlaceBots - procedures that run when a form is submitted or on a scheduled basis.

Basic Customization - Basics

- Reorder
- Show/Hide

Reorder:

Change the order of the table of contents of this place.



You can reorder an item in the list by clicking on the item and then clicking on the up/down arrow.

Show/Hide:

Check the items that you would like to show in this place.

Calendar: Show the Calendar in the table of contents and enable calendar event forms.

Tasks: Show the Task list in table of contents sidebar and enable task forms.

Room Index: Show a link to the Index.

Members: Show members and authors a link to the Members page.

Security: Show members and authors the Security link.

What's New: Show the What's New link.

Daily: Provide a link to the daily news format.

Weekly: Provide a link to weekly news format.

Daily | Weekly: Provide links to both formats.

Room Map: Show a link to the Room Map.

Advanced Search: Show a link to Advanced Search.

Chat: Show the Chat link.

Help: Show the Help link.

Work Offline: Show a link to Work Offline.

My Places: Show a link to My Places.

Feeds: Show a link to feeds.

Note: Some custom themes may not include all the above features.

Basic Customization - Basics

- Notifications
- Incoming Mail
- Real-time collaboration
- Encrypt Offline Places
- Delete this place...

Notifications:

Choose how members are notified about important events in this place.

Send calendar events to subscribers' personal calendars

Send a regular email news update to members

[Customize News...](#)

Notify those responsible when content needs review

Notify those responsible when tasks are assigned and completed

Incoming Mail:

Do you want people to be able to send email to mytestteamp@quickr04.edc.ibm.com as a means of adding content to this place? (Mail will arrive in the Index.)

Yes, put new mail in room: ▼

No

Real-time collaboration:

You can choose whether members can work together in real time using instant messaging and online meetings.

Members can see who is online and send instant messages

Members can schedule online meetings

Disable ActiveX:

If your organization has a policy against using ActiveX, you can disable it here. Your team will not be able to use some advanced authoring features.

Disable ActiveX

Disable Java Applets:

If your organization has a policy against using Java Applets, you can disable them here. Your team will not be able to use some advanced authoring features.

Disable Java Applets

Encrypt Offline Places:

Encrypt the database files comprising this place on the offline user's machine?

Yes, use encryption level: ▼

No

When you delete a place, all content is discarded, and all rooms are discarded. There is no way to recover a place after it has been deleted. If you are absolutely sure that you want to delete this place, type "yes" below, and click Delete Place.

If you do not want to delete this place, click Back.

Basic Customization - Theme

- Default themes

- ▶ Quickr
- ▶ Quickr (with classic navigation)
- ▶ Quickplace Classic



Choose a Theme

Change the way your place looks. Choose an overall visual theme for it from a gallery of standard themes, plus any custom themes you have created.

- Use themes from Business Partners

- ▶ Eg. SNAPPS

- Or build your own

Choose a Theme

Change the way your place looks. Choose an overall visual theme for it from a gallery of standard themes, plus any custom themes you have created.



Quickr

Quickr default theme.



Quickr (with classic navigation)

Modern theme with an expandable Table of Contents.



Quickplace Classic

The Quickplace 6.5 and 7 theme with an expandable Table of Contents.



My Place

Herbert Hilhorst | Sign Out

New Post New... Copy Move Delete Folder Options

- Home
- Discussion
- Library
- Folder1**
- Calendar
- Tasks
- Index
- Customize
- Members

Search

What's New

Work Offline

My Places

Help

Atom

Folder1		
Type	Title	
<input type="checkbox"/>	Subfolder1	Herbert H
<input type="checkbox"/>	Test upload	Herbert H

Quickplace Classic example



Basic Customization - Theme

- Themes are collections of HTML, JavaScript, image and CSS files that collectively define the look, feel, and sometimes functionality of a Quickr
- Quickr 8 and 8.1 services for Lotus Domino is an evolution of IBM Lotus Quickplace®. For 8.0, the elements of theme customization remain mostly the same
 - ▶ Files are stored in main.nsf as “Skin Groups”
- 8.1 implements additional functionality in the theme
 - ▶ Implemented using div tags and javascript
 - ▶ Full 8.1 functionality is available *only* in the 8.1 theme or custom themes derived from it
 - ▶ The 8.1 theme *is* the 8.1 UI (although we still allow use of older themes)
 - ▶ New file set and directory structure
 - ▶ Increased use of AJAX

Basic Customization - Theme

- Build your own
- Generate, modify and upload specific theme parts
 - ▶ Style sheet
 - ▶ Page Layout
 - ▶ Edit Layout
 - ▶ List Folder Layout
 - ▶ Headlines Folder Layout
 - ▶ Slideshow Folder Layout
 - ▶ Image for theme

Custom Themes

You can create custom themes for your place, to give it a new layout and visual style. Once you have created at least one custom theme, you can control which themes are shown to managers when they choose a theme for their place.

Create a Custom Theme

What is the title of this theme?

You can optionally provide a fuller description of the theme:

Styles and Basic layout - Provide a style sheet file and the HTML layout files for reading and editing content - or check "Generate" if you want QuickPlace to generate the file based on the other files that you supply.

Style Sheet (.css file) - defines visual style (fonts, colors, etc.) for all layouts.

Drop File Here!

Generate

Page Layout (.htm file) - defines the layout of content while being read.

Drop File Here!

Generate

Edit Layout (.htm file) - defines the layout of content while being edited.

Drop File Here!

Generate

Folder Layouts - Provide HTML layout files for different kinds of folders - or check "Generate" to have QuickPlace generate the file for you.

List Folder Layout (.htm file) - defines the layout of list and discussion folders.

Drop File Here!

Generate

Headlines Folder Layout (.htm file) - defines the layout of headlines folders.

Drop File Here!

Generate

Slideshow Folder Layout (.htm file) - defines the layout of slideshow folders.

Drop File Here!

Generate

Image to be used in Themes Gallery (80x60)



Basic Customization - Forms

- Use existing forms
- Or build your own

Create:

What would you like to create?



Post

Post a new topic for discussion that can include formatted text, images, and file attachments.



Imported Page

Import an existing Microsoft Office, HTML, JPEG or GIF file from your computer.



Event

Create a new event on the calendar.



Online Meeting

Work with others in real time using screen sharing, chat, and other tools.



Task

Create a new task that you can assign and track on the Tasks page.



Microsoft Word Page

Create content based on a new Microsoft Word document.



Microsoft Excel Page

Create content based on a new Microsoft Excel document.



Microsoft PowerPoint Page

Create content based on a new Microsoft PowerPoint document.



Multiple Imported Pages

Create multiple pieces of content using the contents of existing files on your computer.



Link Page

Create a link to an existing web page.



Upload

Upload a set of file attachments to the Lotus Quickr library for this place.



Page

Create a new page that can include formatted text, images, and file attachments.



Survey

This is a survey form to get feedback on the quality of this place.



Folder

Create a new folder in which you can place content or additional folders.



Room

Create a new private space in which you can place content, folders, or additional rooms.

Basic Customization - Forms

- Create new form
 - ▶ Simple form
 - ▶ Microsoft Office form
 - ▶ Imported HTML form
- Reorder forms
- Show/Hide forms

Home Discussion Library Calendar Tasks Index **Customize** Members

Forms

You can easily create and edit custom forms for authors to fill out. Each form you create will be listed as an option when an author clicks Create...

- ▶ Create a new form by clicking the New Form link on this page.
- ▶ Edit an existing form by clicking its name below:
 - (no custom forms have been created in this place yet)
- ▶ Reorder Forms. Change the order that forms are shown in when an author clicks Create... in this room. Click Reorder Forms.
- ▶ Show/Hide Forms. Choose which forms to show when an author clicks Create... Click Hide Forms.

Click New Form to create a new form.

Create...

New Form

[Reorder Forms](#)

[Show/Hide Forms](#)

[Notify](#)

[Print](#)

[Work Offline](#)

About this Folder:

Name: Forms

Description: Create custom forms for authors to fill out. Forms can have fields such as text, pop-up lists, etc., and a workflow such as approval cycle or editor-in-chief.

Role: Manager

What kind of form would you like to create?

- Simple Form. Create a form using standard QuickPlace fields such as plain or rich text, attachments, date popup, task information, etc.
- Microsoft Office Form. Use a Microsoft Word, Excel, or PowerPoint document as a template for new content.
- Imported HTML Form. Create a form using your own HTML.

Basic Customization - Forms

- Create new form

What kind of form would you like to create?

- Simple Form. Create a form using standard QuickPlace fields such as plain or rich text, attachments, date popup, task information, etc.
- Microsoft Office Form. Use a Microsoft Word, Excel, or PowerPoint document as a template for new content.
- Imported HTML Form. Create a form using your own HTML.

What is the title of this form?

Survey

What fields would you like to include in this form?

Add...	Title
Modify...	How do you rate this place
Remove...	
Reorder...	

Workflow: Do you want content created with this form to be reviewed before being published?

Modify... Standard Workflow

Do you want content created with this form to always be placed in a specific folder?

—No Specific Folder—

You can optionally provide a fuller description of the form.

This is a survey form to get feedback on the quality of this

Cancel Delete Form Done

What type of field would you like to add to this form?

- Plain Text. Presents a one-line unformatted text field.
- Text Area. Presents a multi-line unformatted text field.
- Pop-up List. Presents a list of choices from which to choose.
- Date Pop-up. Presents a field with a pop-up calendar for choosing a date.
- Time Pop-up. Presents a time pop-up.
- Name Pop-up. Presents a list of place members.
- Attachments. Presents a field for adding file attachments.
- Rich Text. Presents a field where the author can enter formatted text and images.
- Legacy Rich Text. Presents a field where the author can enter formatted text and images using the editor from previous releases.
- Calendar Date-Time. Presents a combination that content created with this form will automatically add to the place's calendar.
- Task. Presents a combination of task related with this form can be tracked as tasks.
- Notification Indicator. Used to automatically notify the author when content is created.
- Non-Editable Rich Text. Presents non-editable rich text. Typically this is used to provide an attachment.
- Content Author. Presents the non-editable name of the author who created the content with this form.
- Creation Date. Presents the non-editable date and time when the content was created.
- Last Content Editor. Presents the non-editable name of the author who last edited the content with this form.
- Last Modified Date. Presents the non-editable date and time when the content was last modified.
- Content Size. Presents the non-editable size of the content.
- Serial Number. Presents a non-editable unique identifier for the content created with the form (e.g. Purchase Order Number).

What is the title of this field?

How do you rate this place

Pop-up choices (enter one choice per line):

Excellent
Good
Average
Bad

Initial choice (from the list above):

Other settings:

Alert the author if they forget to fill out this field.

Optional. Do you want to present any instructional information about this field that will be helpful to authors?

This helps us to improve the place

Basic Customization - Forms

- Create new form and new content

What is the title of this form?

What fields would you like to include in this form?

Workflow: Do you want content created with this form to be reviewed before being published?
 Standard Workflow

Do you want content created with this form to always be placed in a specific folder?

You can optionally provide a fuller description of the form.

Workflow. By setting the workflow for a form, you can route content to specific members and folders as it is being published.

What type of workflow should this type have?

- No special workflow. Content is simply created by an author and published by the member who created it. The content can also be saved under construction.
- Simple Submit. Content is simply created by an author and submitted.
- Editor-In-Chief. Content is created by authors, but will only be published after being approved by a specific member - the Editor-In-Chief.
- Approval Cycle. Content is routed through a series of members in a specific order.
- Multiple Editors. Content is created by an author and then, once published, can be further edited by any of the authors in the room.

Create:

Title:
 Show the title, author and date on page?

How do you rate this place. This helps us to improve the place

Enhanced Customization

- Creating and Customizing Objects using Notes
- Using PlaceBots

Enhanced Customization - Creating and Customizing Objects using Notes

- Since Lotus Quickr Objects are based on Domino Objects, you can use Lotus Notes and Domino Designer to customize these Objects
- It is important to note that the Schema could change at any release and it may be necessary to change some of your customizations
- The place database has a specific QDK view that allows you to:
 - ▶ Customize an existing Object using Lotus Notes
 - ▶ Create a new Object using Lotus Notes

Enhanced Customization - Creating and Customizing Objects using Notes

Quickr Obj.	Lotus Domino Object	Description
Place	File system directory	Organizes pages in rooms and folders.
PlaceType	A collection of database (.nsf) or Notes template (.ntf) files derived from a parent place.	The structure and design used to create a particular type of place. For example, the default place is Main.nsf, which is created from the MeetingRoom.ntf template. MeetingRoom.ntf is a PlaceType.
Room	Notes database (.nsf)	A collection of pages with its own security and authentication protection.
RoomType	Notes template (.ntf)	The structure and design used to create a particular type of room.
Folder	Domino folder or view	An organizing structure for collecting and displaying related pages in a site.
Page	Domino form + subform + data note	The basic vehicle for content. You can create content using the Lotus Quickr editor or import content from an external source.
Member	Domino data note	A member note contains information about a team member of a place.
Form	Data note of type "h_Form"	Manages the display of data notes. A form can contain fields for containing data and employ scripts to process and compute data.
Field	Data note of type "h_Field"	Allow for user input of data into data notes.



Enhanced Customization - PlaceBot

- PlaceBot is an agent written in either Java or IBM Lotus LotusScript®, that performs a certain task, such as updating other contents when creating new content or other actions in a scheduled way.
- PlaceBots can access, manage and process data in a place.
- PlaceBots can be setup to run on two occasions:
 - ▶ On a schedule
 - ▶ Once a form is submitted



PlaceBots

Customize how your place operates by creating PlaceBots - procedures that run when a form is submitted or on a scheduled basis.

Enhanced Customization – PlaceBot files

- A PlaceBot file can consist of many files. There are five formats supported:
 - ▶ Java based (.java, .class, .jar, .zip)
 - ▶ LotusScript (.lss)
- If importing multiple java agent files, provide the name of the agent base class

What is the title of this PlaceBot?

You can optionally provide a fuller description of the PlaceBot:

When should this PlaceBot run?

When a form is submitted:

On a scheduled basis:

Import the Java (".java", ".class", ".jar", ".zip") or LotusScript (".lss") agent file(s) by clicking the folder icon below, and selecting the desired file(s). (You can also drag file(s) from your desktop):



File Name	S

If you are importing multiple java agent files, provide the name of the agent base class:



Enhanced Customization - Creating a PlaceBot

- Schedule PlaceBots on
 - ▶ Content that has been modified or added to this room since the last time the PlaceBot ran.
 - ▶ All content in this room.
- In a specific folder only or not
- Frequency
- More options

What content should the PlaceBot affect?

Content that has been modified or added to this room since the last time the PlaceBot ran

Should the PlaceBot affect only content in a specific folder?

—No Specific Folder—

How frequently do you want the PlaceBot to run?

Monthly

Run monthly on day: 1

Start at: 01:00 AM

Weekly

Run weekly each: Sunday

Start at: 01:00 AM

Daily

Run daily at: 01:00 AM

Don't run on weekends

More Than Once Daily

Start at: 01:00 AM End at: 11:00 PM

Every: 1 hour(s) 0 minutes

Don't run on weekends

The following options are also available:

Don't start until this date: 07/09/2007

Stop running on this date: 07/09/2007

Disable PlaceBot



Summary

- What is Quickr Customization?
- Quickr Architecture
- Basic Customization
 - ▶ Basics
 - ▶ Theme
 - ▶ Forms
- Enhanced Customization
 - ▶ Creating and Customizing Objects using Notes
 - ▶ PlaceBots








PlaceTypes

- PlaceTypes are blueprints to create Lotus Quickr places from and are like Domino templates
- There are two steps to make a place available as a PlaceType:
 - ▶ Place owner creates a place and allows it to be a PlaceType with options shown below
 - ▶ Lotus Quickr administrator creates the PlaceType based on the previous place



PlaceType Options

Use this place as a template for future places! Choose whether this place can be used as PlaceType, and which of its features to include in future places based on it.

<p>Allow PlaceTypes to be created from this place?</p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p> <p>Description to be used in the PlaceTypes gallery:</p> <div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div> <p>Image to be used in PlaceTypes gallery: (100x80)</p> <p><input type="button" value="Browse"/> <input type="button" value="X"/></p> <div style="border: 1px solid #ccc; width: 100%; height: 80px;"></div> <p>URL to additional information about this PlaceType:</p> <div style="border: 1px solid #ccc; width: 100%; height: 20px;"></div>	<p>Include the current members of this place in places created from the PlaceType?</p> <p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Give place creator manager access to rooms in places created from the PlaceType?</p> <p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Show the Members page? Hiding Members removes the ability to manage membership in the place.</p> <p><input checked="" type="radio"/> Show members</p> <p><input type="radio"/> Hide members</p> <p>Allow managers to make changes to the table of contents?</p> <p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p>	<p>Enable these areas in future places created from this PlaceType:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/>  Basics <input checked="" type="checkbox"/>  Decorate <input checked="" type="checkbox"/>  Forms <input checked="" type="checkbox"/>  Rooms <input checked="" type="checkbox"/>  PlaceType Options <input checked="" type="checkbox"/>  Custom Themes <input checked="" type="checkbox"/>  PlaceBots
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PlaceTypes

- Useful places can be enabled to serve as models for new places
- Allow place to be used as a template (owner via customize)
- Create PlaceType (administrator creates and adds to available list)

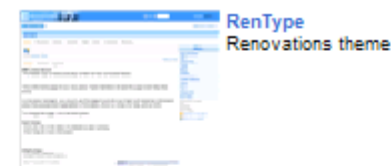
Allow PlaceTypes to be created from this place?

Yes

No

Description to be used in the PlaceTypes gallery:

- Create a Place:
- **Work with Templates**
- Site Administration



Click Create PlaceType to create a new PlaceType.

Create PlaceType ... Reorder Show/Hide Refresh List

Lab overview

- In this lab, you will explore the various options for customizing a Quickr place
- The goals of the lab are to:
 - ▶ See how easy it is to customize place options, look, and behavior
 - ▶ Work with themes and build new ones
 - ▶ Understand and create forms
 - ▶ Discover PlaceBots
 - ▶ Configure and build new place types
- Customizing Quickr Lab can be found in the Lab Workbook

Lab – Lotus Quickr Customization (Domino Services)

- Purposes
 - ▶ Basic customization of an existing place
 - ▶ Configure and build new place types
 - ▶ Work with themes and build new ones
 - ▶ Understand and create forms
 - ▶ Discover PlaceBots

- Lab
 - ▶ Change Basics
 - ▶ Work with Themes
 - ▶ Create new Forms
 - ▶ Discover PlaceBots
 - ▶ Create a new PlaceType

Questions

