

Intro to Lotus Quickr



Jess Stratton, Solace

What We'll Cover ...

- **What IS Lotus Quickr?**
- **Why would I want to use Lotus Quickr?**
- **What are the three different Place types?**
- **What are the three ways to access Lotus Quickr?**

What IS Lotus Quickr?

- **From Lotus:**
 - ♦ **“IBM Lotus® Quickr® is team collaboration software that can help you access and interact with the people, information, and project materials you need to get your work done.**
 - ♦ **Lotus Quickr offers team spaces, content libraries, team discussion forums, wikis, and connectors to make it easy to share documents and information amongst a team.”**



In English, please!

- **Quickr does the following:**
 - ◆ **Allow you to create a central meeting place with all the people involved in a project:**
 - ▶ **You can share documents in a single repository**
 - ▶ **You can create a new “version” of a document and build it together**
 - ▶ **You can send an email to everyone involved in the project**
 - ▶ **You can create “Tasks” and assign them to people in the project**
 - ▶ **You can have a discussion forum to discuss topics involving your project**

What is a Quickr “Place”?

- **Having different Places is like having different apartments in a complex.**
 - ◆ **Each one houses different people.**
 - ◆ **Each one has some of the same elements:**
 - ▶ **Living room, kitchen, etc.**
 - ◆ **However, each place has a different style/look and feel.**
- ◆ **SO, a Place is a virtual room created for a very specific purpose for a specific group of people.**



Lesson

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Tell me if this problem sounds familiar:

- You start an email thread about your project to several people.
 - ♦ Some people Reply to All, some reply only to you!
 - ▶ People are now only getting half a conversation.
 - ♦ Then some new people need to be added to the “discussion”.
 - ▶ Someone has to forward them the disjointed conversation!
- ♦ CONCLUSION:
 - ▶ Email is NOT conducive to productive discussions!



Problem

How about this problem?

- You create a Word document, and forward it to someone for editing.
 - ♦ They forward it to someone else.
- Months later, you need to send the document to someone new.
 - ♦ However, that original person you sent it to changed it.
 - ♦ Who has the right, good, proper updated version?
- And who are we kidding anyway?
 - ♦ At this point, the fastest way to find it is to dig through your “Sent” folder, right?
 - ▶ Uuuuuuggggghhhh.....



Problem

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The three Place types:

- **Standard Place for Teams**
- **Blog**
- **Wiki**



**Decision
Point**

Place 1: Standard Place for Teams

- **This Place is good for projects and/or team-based.**
- **With this Place, you get:**
 - ♦ **A discussion forum (message boards)**
 - ♦ **Assignable task tracking**
 - ♦ **A team calendar (for milestones, meetings, etc.)**
 - ♦ **A document storage library**
 - ▶ **You can create subfolders in the library, too!**



Checklist

Place 2: Blog

- **A team blog allows for shared collaboration with more structure:**
 - ◆ **A blogroll**
 - ▶ **(A collection of links to useful web sites)**
 - ◆ **Share images**
 - ▶ **Logos, etc.**
 - ◆ **New content is posted news-style**
 - ▶ **This is GREAT for meeting minutes!**
 - ▶ **You can refer back to old minutes by calendar or month archive.**
- **A blog is NOT meant for attached documents.**
 - ◆ **For maximum return, entries should be typed directly into a Place form.**

Place 3: WIKI

- **A Wiki is a content-sharing area.**
 - ♦ **Team members can write and edit each other's content.**
 - ♦ **History of each entry can be tracked.**

 - ♦ **Wiki's are not for attached documents, either.**
 - ▶ **Think procedural documentation.**
 - ▶ **Just like Wikipedia.org!**

One more thing about Places and projects:

- You can have three Places to manage one project!
 - ◆ Have all three Place types:
 - ▶ A Standard Team Place to run the project
 - ▶ A blog to post meeting minutes and to broadcast project updates
 - ▶ A Wiki to post useful information about the project
 - *A glossary*
 - *Training guides*
 - ▶ Having a wiki and a blog could actually lessen the “clutter” from the Standard Team Place document library!



Solution

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There are three ways to access Quickr documents:

- **The full web browser**
 - ◆ **Accessing via the web**
- **Using the Quickr connectors in the Lotus Notes sidebar**
- **Using the Quickr connectors as a Toolbar in Microsoft Office products and Windows Explorer**



**Decision
Point**

Accessing Quickr outside the office

- If you are outside the office, you **MUST** be connected via VPN before you can access your documents on Quickr.
 - ◆ Quickr documents are located on the JUPITER server.
 - ▶ **They are backed up nightly!**
- When you access documents via the Notes sidebar, it's a “shortcut” to the actual documents located on JUPITER.

Using Quickr in the full web browser

- How do I get there?
 - ♦ <http://jupiter.tac.com/LotusQuickr>



What can I do in the full browser edition in my Place?

- Read and create forum posts
- Read and edit documents in the Library
- Email the Place members
- Assign tasks to members
- Create a new version of a document and see the previous edit history
- Add and read comments about documents
- Download the Quickr Connectors
- Search multiple Places at once
 - ♦ Well, - any Place you are a member of!



Checklist

A Quickr document using the web interface:

The screenshot displays the Lotus Quickr web interface. At the top, there is a navigation bar with 'Lotus Quickr' and 'My Places'. Below this, a secondary bar shows 'My Places' and the current location 'Project BugFreeQuickr'. A left-hand sidebar contains a menu with icons for Home, Library (multiple instances), Forums, Calendar, Tasks, Index, Members, and Trash. The main content area shows the breadcrumb path: 'You are in: Project BugFreeQuickr > Library > Subfolder Test > TEST DOCUMENT'. The document title is 'TEST DOCUMENT UPLOAD1.doc', created on July 21, 2011, at 11:19 AM by JESSICA STRATTON, with the last modification by STRATTON | Public. Action buttons include 'Edit Document', 'Replace', and 'More Actions'. A preview section shows a document icon with a large 'A' and options for 'Preview' and 'Download TEST DOCUMENT UPLOAD1.doc (47k)'. Below the preview are tabs for 'About', 'Comments', and 'Versions'. The 'Comments' section includes a link to 'Add Comment' and 'Expand all comments', followed by a comment: 'What this doc really needs is more cowbell.'

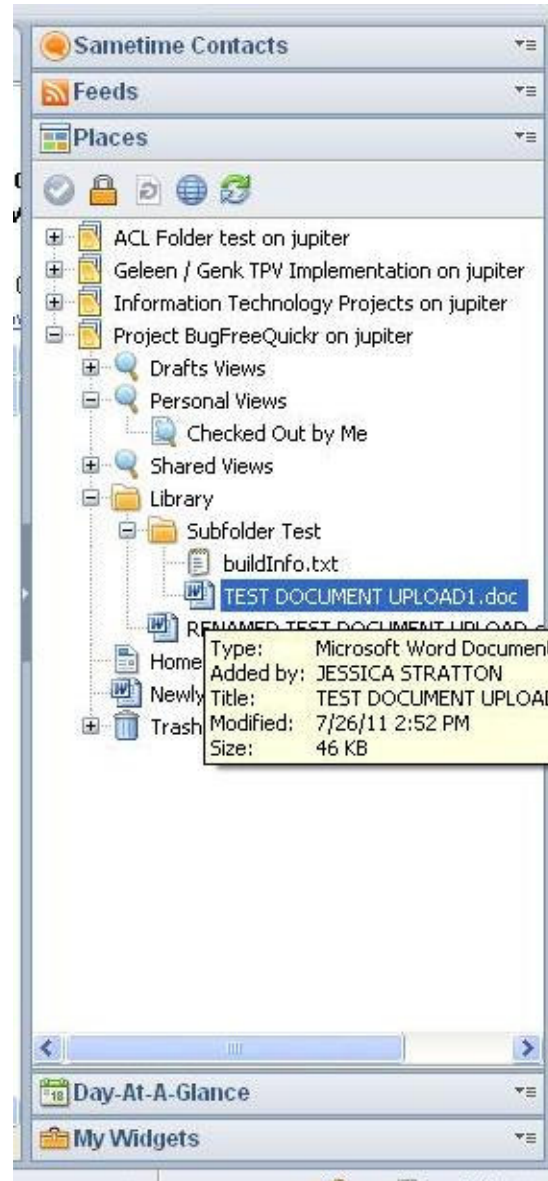
What can I do using the Connectors in the Notes sidebar?

- **View, check-in, check-out, and edit documents from the Library**
 - ◆ **Note: ONLY the library. No forums, tasks, etc.**
- **Create new versions of documents**
- **See who has checked out a document**
- **Chat about documents**
- **Send email links to documents**
- **Drag a document into a Library or folder**
- **See a list of documents you have checked out**
- **See a list of documents that are drafts only**
 - ◆ **Drafts are docs that are not published and visible only to you.**



Checklist

A Quickr document using the Notes sidebar:



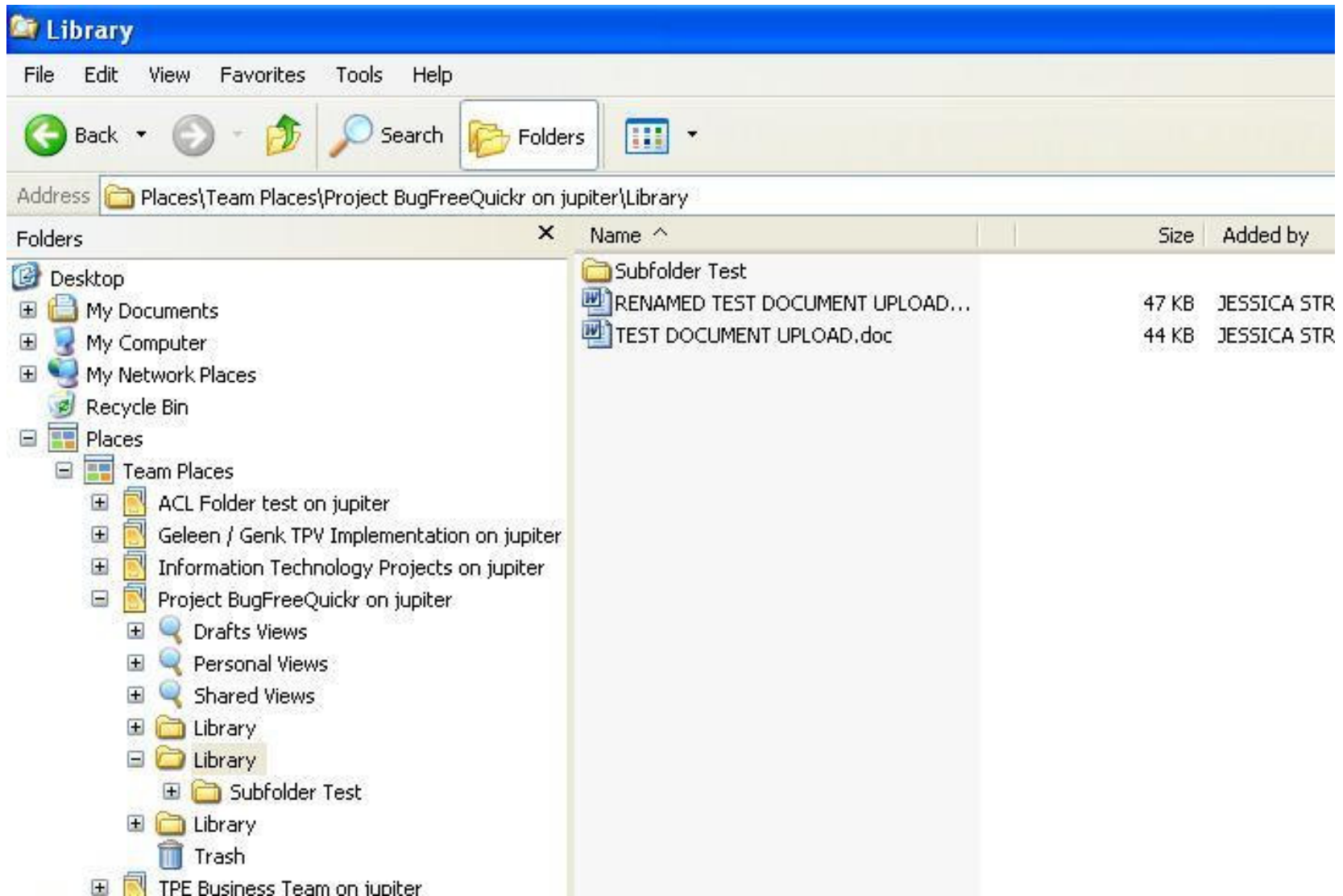
What can I do using the Connectors in Windows Explorer?

- View, check-in, check-out, and edit documents from the Library
- View forum posts here!
- Create new versions of documents
- See who has checked out a document
- Chat about documents
- Send email links to documents
- See a list of documents you have checked out
- See a list of documents that are drafts only
- Drag a document into a Library or folder



Checklist

Quickr via Windows Explorer



What can I do using the Connectors in a Word document?

- Add the current document you are working on directly to a Place
- Open a document from a Place
- Check-in/check-out a document



Checklist

The Connectors in Microsoft Word

