teamware®
a Fujitsu company

Teamware Pl@za 3.4

Product Overview

MC0028EA

March 2002

This document was produced by the Teamware Group Oy in Helsinki, Finland.
We welcome and consider all comments and suggestions. Please send them to:

Teamware Group Oy

Marketing Communications

P.O. Box 135

00381 Helsinki

FINLAND

Table of Contents

1 Introduction

Teamware Pl@za is a platform for building community web sites. It provides the tools and services for constructing a web site that meets a community's needs. The site is easily customized to give the look and feel that the community wants. As it is a server-based product, users can view the site with a standard browser; no additional client software needs to be installed. Pl@za 3.4 is available on Solaris and Windows 2000 platforms.

Pl@za's services offer a consistent and simple user interface, which users will quickly understand. Pl@za automatically handles administrative tasks such as user authentication and access control.

Pl@za is written in Java. This opens up access for the developer to the wide range of Java packages that are now available. This can facilitate the integration of external components if a community should require this. Pl@za has adopted standard Internet protocols.

This document is an overview of the Pl@za 3.4 facilities. For more technical details or help on modifying the existing services, see the documents listed in Chapter 4, Pl@za Documentation.

2 Facilities

This chapter summarizes the extensive facilities that Pl@za offers.

2.1 Dynamic User Interface

Pl@za's pages are dynamically built when they are requested. They are constructed from skeleton or template pages. These templates consist of HTML interspersed with special Phoenix tags. When a template is expanded, the tags are translated into information that is specific to the community or, perhaps, even to the user. To end-users, an expanded Pl@za temp late looks like an ordinary HTML page.

The information a tag yields can vary depending on:

- The information stored in the community's site
- The user or device making the request

This provides a way of building a different view of Pl@za services for different purposes. For example, users can have their own view, which reflects their interests, access rights and role in the system.

The page a user sees is actually constructed from two different types of Pl@za templates:

- A layout template
- A service template

During template expansion the layout and service templates are combined to form the page that the user sees. To assist with the localization of a site, both of these types of templates are delivered in a language neutral form, known as a master template. In this master template, a language tag has replaced all language specific words or phrases.

During the localization process that occurs when a site is commissioned, the master templates are translated into localized versions in the appropriate language for the site. The master templates are localized by replacing the language tags with words and phrases, read from a separate file, in the language to which the templates are being localized. When the system is in use, only the localized templates are used to create the pages shown to the users.

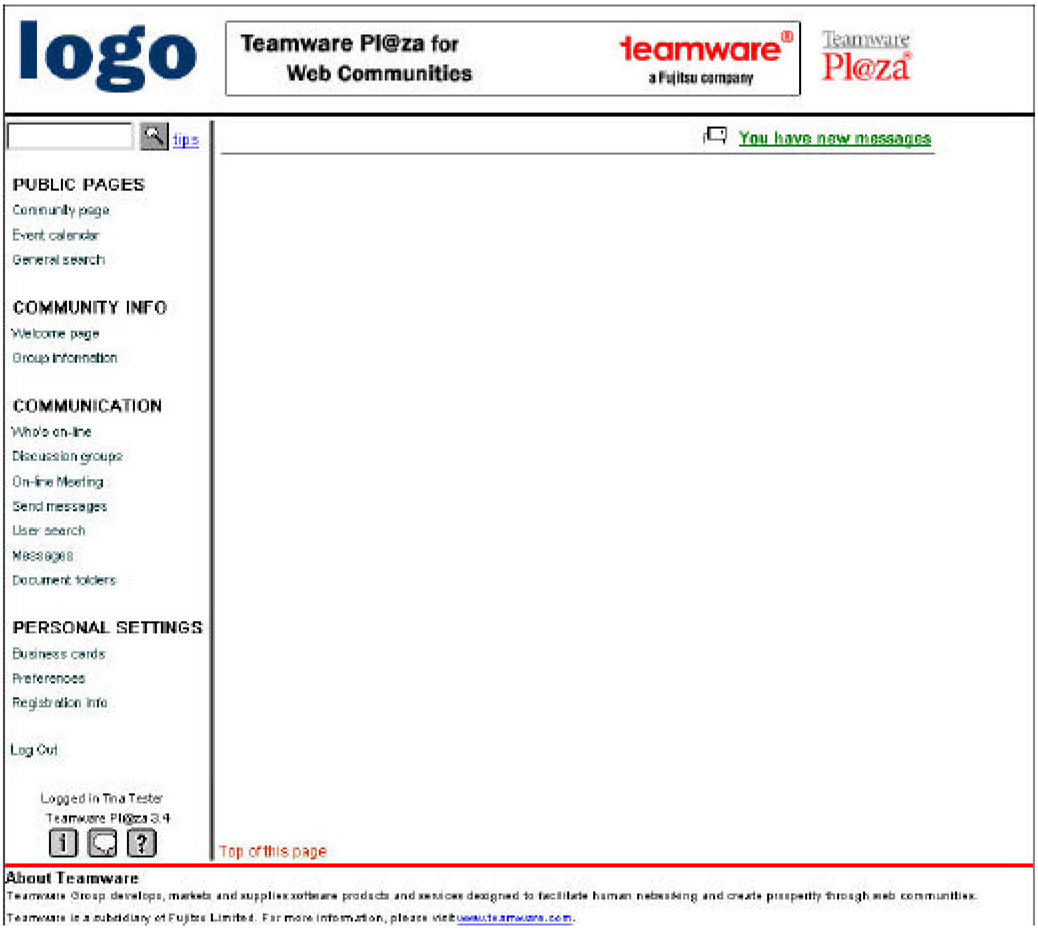
2.1.1 Layout Templates

A layout template provides the outline and general components (such as banners, counters, logos, help, navigation, and feedback functions) used on the pages of a Pl@za site. See the example of a Pl@za layout template shown at the end of this subsection.

The same layout template can be used for many pages. Several layout templates can be defined for a site. Standard Pl@za comes with the following two different layout templates:

- Public
- Community

Layout templates provide an easy and effective way of changing the look of a site. Only one file needs to be modified to change the appearance of many pages. It also ensures that a consistent look and feel is retained.

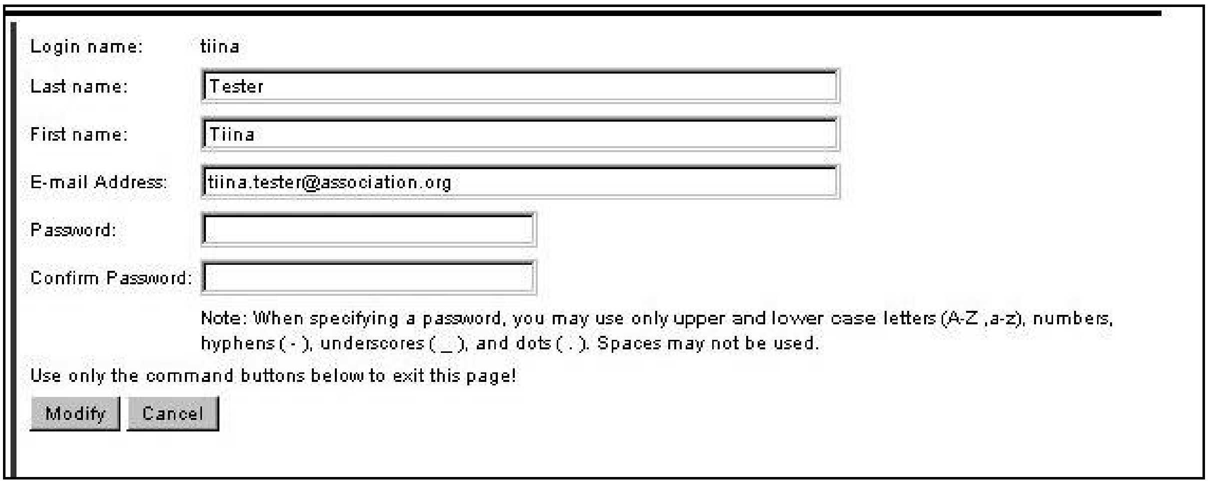


A Pl@za layout template

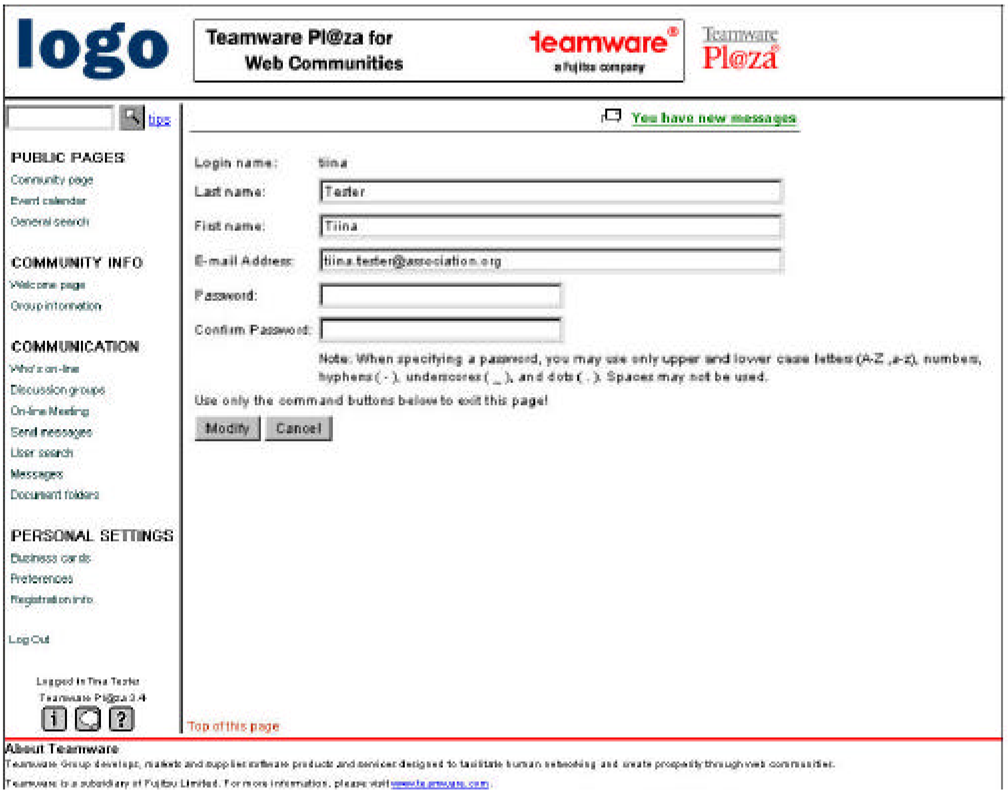
2.1.2 Service Templates

A service template defines the components used by a specific service and displays information that is specific to that service. A service template is usually combined with one of the layout templates to provide the final page that the user sees.

A service template can use Phoenix tags that are specific to the service. An example of a service template is shown below, followed by an example of a service template combined with a layout template.



A service template (registration form)



A service template combined with a layout template

2.1.3 Localizing Templates

All Pl@za templates are designed in such a way that they can be localized easily for any language by editing only the plain text files. The master templates (which may be service or layout templates) contain only placeholders for the localized text. They do not contain text for display. This means that a single template set supports multiple language versions. If needed, any templates, associated graphics and screen layouts may be modified still further for any individual language.

2.2 Authentication and Registration

A user name identifies each user. User authentication is performed only once per session. After authentication, a user will be known throughout the session so his or her access rights and user preferences can be reflected in his or her view of the services.

The services and pages can be configured to be only visible to an authenticated user, and templates can also contain different views. The choice of view to display can depend on whether the user has been authenticated or not.

By default in Pl@za, users can view the public pages without authentication.

There are three ways of registering new users on the system:

- **Open registration**
  This allows people to register themselves on the system. The user account becomes active immediately after the self-registration process.

- **Registration that needs confirmation**
  The option of sending the request for a user account to a predefined person (known as **useradmin**) is configured into the system. A user fills in the registration form and an e-mail is sent. The mail message contains links back to the site where the application can be accepted or rejected.

  If controlled user registration is used, it means that registration requests are always sent to useradmin. The system can be configured to send the registration request to a different useradmin, based on the information submitted during registration. Userdamin can then choose one of the following options:

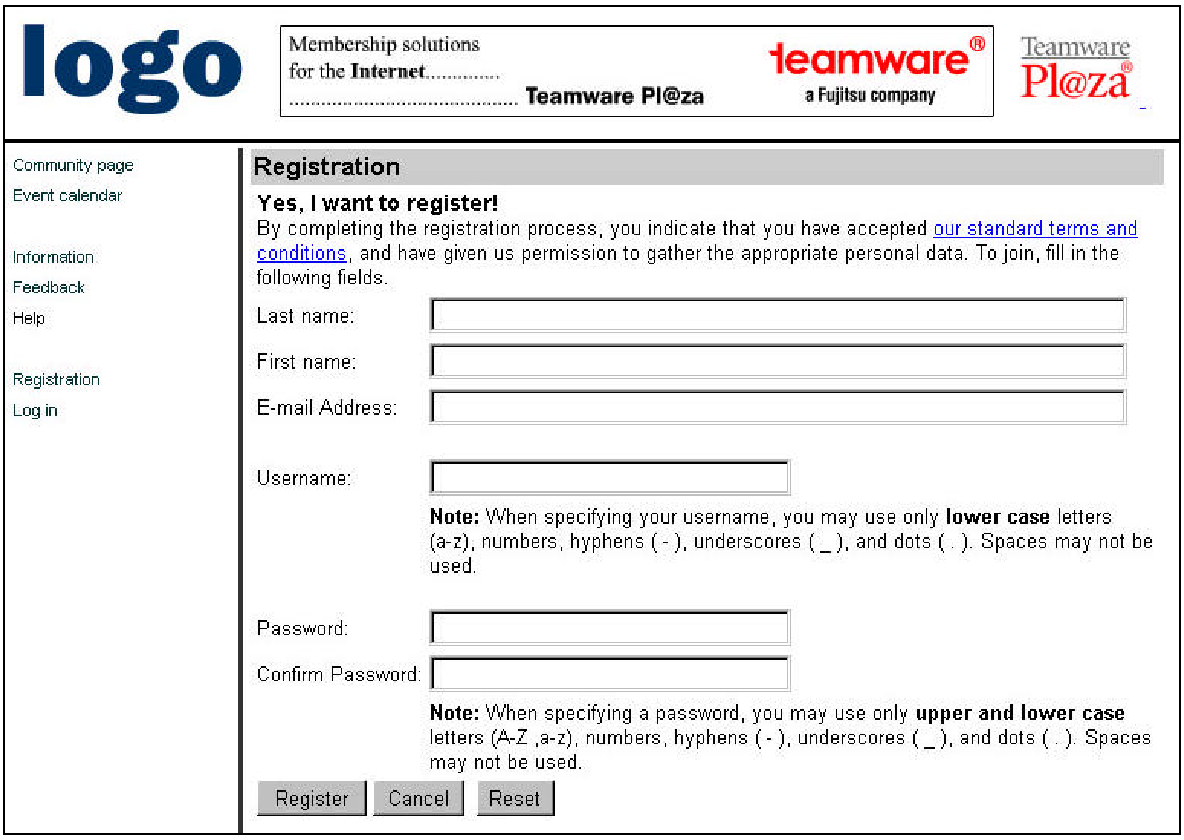
  - Accepting the registration request
  - Accepting the user only as a guest
  - Rejecting the request

  In each case, a configurable mail message can be sent to the user informing him or her of the action taken.

- **Administrative registration**
  With this, only users who are members of the system or user administrators' groups can register new users (the roles are defined in section 2.21, Administration).

- The registration form is the same for all the different types of registration. By default, Pl@za asks for the following information: last name, first name, e-mail address, username, and password. All fields need to be filled in. The form includes a link to a page explaining terms and conditions.

The registration form and its fields can be modified to meet the needs of different on-line communities. An example of a registration form is shown below.



A Registration form

2.3 Interactive Business Card (IBC)

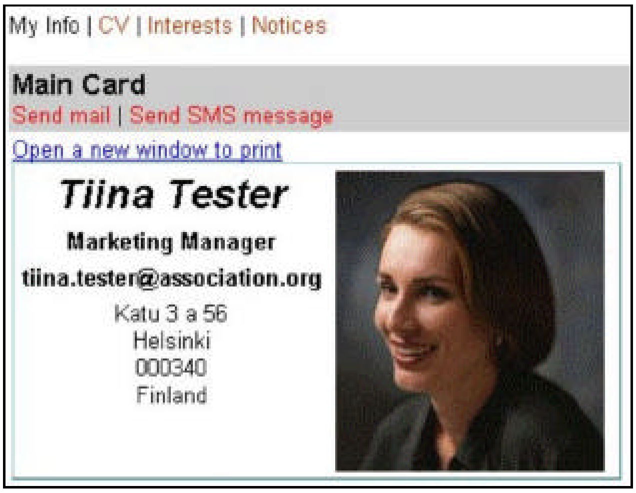
An Interactive Business Card (IBC) provides a home page and a membership card for users of the system. It also allows users' data to be viewed and edited for community records. Import and export tools are provided for moving information into other systems. By using the Data Synchronization component, users' data can be synchronized with a back office membership database.

Non-registered users of the system can view an IBC by visiting the URL:
http://<*the name of the Pl@za site*>/ibc/<*User id*>

An IBC can act as a user's Internet home page or, if the user already has a home page, it can provide a link to that page.

The IBC service gives the user a number of cards covering such areas as personal and business details, CV and interests. The number, type, content and layout of the cards can be modified for a particular community. In Pl@za, there are five default cards: My Info, CV, Interest, Fun and Notices.

An example of the main (My Info) card of an IBC is shown below.



An Interactive Business Card (IBC)

Authorized users can easily fill in their cards. The cards can contain text, images and URL links to elements within or outside the system.

A user can define the viewing rights for the cards and fields. There are three levels of access to the information on the cards:

- **Private**
  Only the user and the managers of the community can see information marked as private. This access level can be used to save information such as membership numbers.
- **Group**
  Other members of the community can see information marked as being visible to the group. Users may be prepared to give their contact information to the other users of the system, but might not want it made public.
- **Public**
  Anyone using the Internet and viewing the cards can see information marked as public.

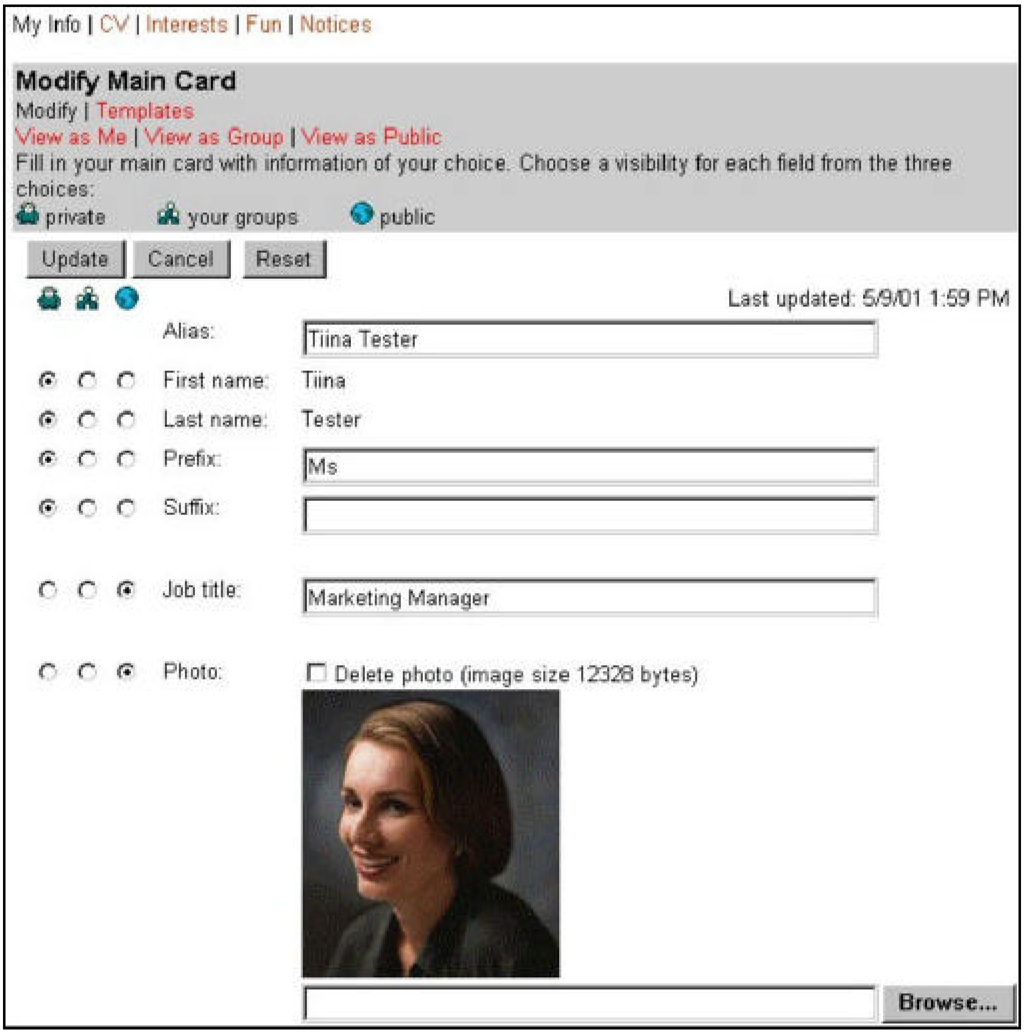
Users can choose the look of the cards from templates with different styles (background, grouping, and fonts). To give the cards a common look, the community can define the basic form and style of the cards.

An IBC also provides different methods for contacting a user. An e-mail or an SMS (the short-message-service accepted by mobile phones) can be sent from an IBC. Users can define the visibility of these contact methods in the same way as they define the visibility of the other information on the cards.

Also available is a Print button, which displays the card, without the surrounding layout template, in its own window.

All groups, including Special Interest Groups and Committees, also have their own IBC..

Interactive Business Cards are part of Pl@za 3.4 Standard Edition.



A view for modifying the content of an IBC

2.4 Who's online

With the help of Who's online users can check who else is currently logged in. Who's online assists in networking between people by providing an easy way to call others to online meetings or checking their IBCs.

In addition to users' identification, administrators can also see how each user has been logged in and their idle time during the session. Each user's client address is also shown to administrators.

Who's online is part of Pl@za 3.4 Standard Edition.

2.5 Discussion Groups

Pl@za Discussion Group services provide an easy way for users to discuss topics of common interest.

Discussion Group service is part of Pl@za 3.4 Additional Functionality.

The services provide the following basic facilities:

- Writing a message

- Replying, with or without a quotation
- Deleting one's own messages
- Sorting messages
- Marking messages as read
- Choosing to have notifications sent about new messages in chosen discussion groups
- Choosing to have notifications sent about new discussion groups that have been created

The service is based on a standard news server. One news server can be shared between several Pl@za systems.

A discussion group is divided into topics, and each topic can contain several messages. Different access rights can be defined for each group. For example, only certain people might have write access to a group, but anyone might be able to read the messages. The visibility of discussion groups can be limited to a group of users (for example, a special interest group or a committee) and hidden from the other users of the system.

A user can use the Preference page to:

- Choose the discussion groups that he or she follows. These groups will be shown on the list of chosen discussion groups. A notice about new discussion groups is displayed in the discussion group Preference page when new groups are added to the system
- Choose the discussion groups for which he or she wishes to receive notifications about new messages and about the creation of new discussion groups

One view of the discussion groups displays the messages in the following three categories:

- **Recent**, that is, messages that have arrived since the last visit to this service
- **Unread**
- **All**, that is, all the messages in the selected discussion groups

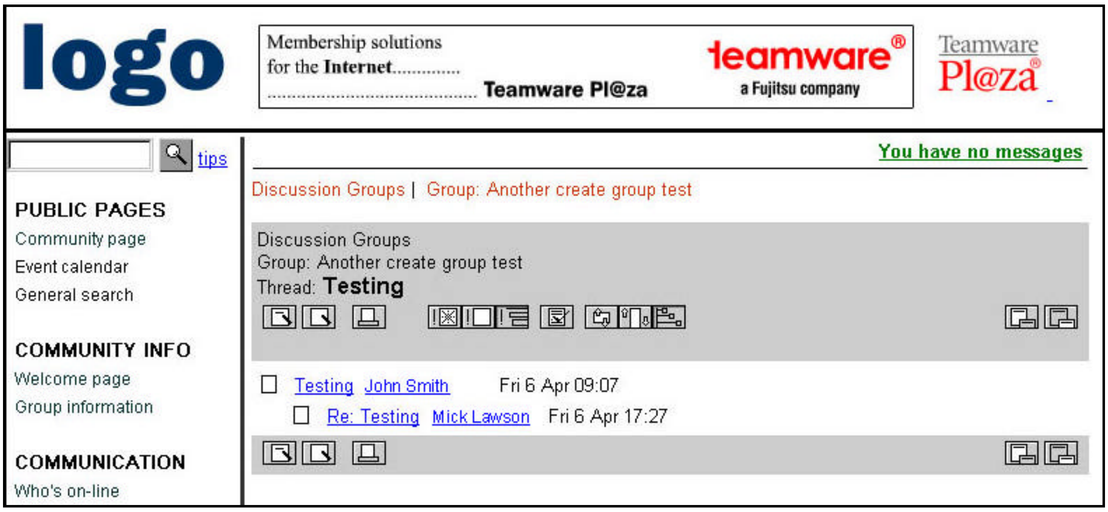
A user can choose to view the messages from any one of these categories.

These categories also apply to the lower levels. Therefore, when users browse through the contents of a single discussion group, depending on their choice, they can see the recent, unread or all messages inside a topic. A user can change this when browsing the messages at any level.

There are three different views for reading the messages: a single message view and a multiple message view and a threaded view. In the single message view, one message at a time is displayed for viewing. In the multiple message view, several messages are displayed at the same time for viewing. In the threaded view a discussion thread is shown in a hierarchical view using indentations to reflect the structure of the discussion thread.

Each discussion message has a link to the author's IBC and a Send Mail button for sending a private reply by e-mail to the author. This makes the people behind the messages seem more real and makes the system more personal.

An example of part of a discussion group topic is shown below.



A threaded view of a discussion group topic

2.6 Document Folders

The Pl@za Document Folder service allows users to share their documents with each other and to store them in the system. The service supports the following functions: reading (HTML), writing (text or HTML), uploading, downloading, and searching for documents.

Document Folders are part of Pl@za 3.4 Additional Functionality.

The document folders are arranged in a tree structure (or hierarchy) with a single folder at its root. The root folder, like any other folder, may contain files and subfolders. One of the following three levels of access rights can be defined for each folder and granted to groups or individual users:

- The right to add and modify documents and folder properties
- The right to browse the folder and read the documents
- No rights to the folder or its contents

By default, Pl@za provides each user with a home folder, with all rights to it.

Any type of document can be uploaded into the folders. Document folders displays different document file types with different icons. There is an interface to create simple HTML and text documents. When a document is saved in a folder, a user can specify its type and the time when it should become visible, add a short description, and define key words for searches. Users can add access controls to document and folders and define 'Manage,' 'Read' and 'Write' permissions.

HTML documents can be displayed in the browser. Other documents can be viewed with the appropriate application. The standard browsers can recognize the most common document formats (MS Word, MS PowerPoint, MS Excel) and open the application for viewing the document.

The Document Folder service includes a search function that allows users to search the documents in the system. Depending on the access rights defined, the search covers the summary, keywords, and content of HTML documents. PDF file indexing is supported via a third-party application.

A user can define one of the following as the search criterion:

- A single word
- The beginning of a word
- A phrase

A user can download or view a document by quoting its URL. The URL can appear as a link on another page in the system, allowing the document to be accessed from there. Non-members of the community may still be able to view certain documents. If required, the URLs for such documents could appear as links on the public community pages.

A user can choose to receive notifications about changes in chosen document folders.

An example of a document folder is shown below.

A view of a document folder

2.7 Formpage

With Pl@za Formpage, creating and updating page content is quick, easy and needs only basic HTML skills.

Formpages are part of Pl@za 3.4 Standard Edition.

Formpage has two different modes:

- **Viewing mode** (shown below)
  in which the page appears the same as any other Pl@za page
- **Editing mode**
  in which the content can be created or modified, and a template can be chosen. The

editing rights to the page can be limited to the group of people responsible for the page's contents.

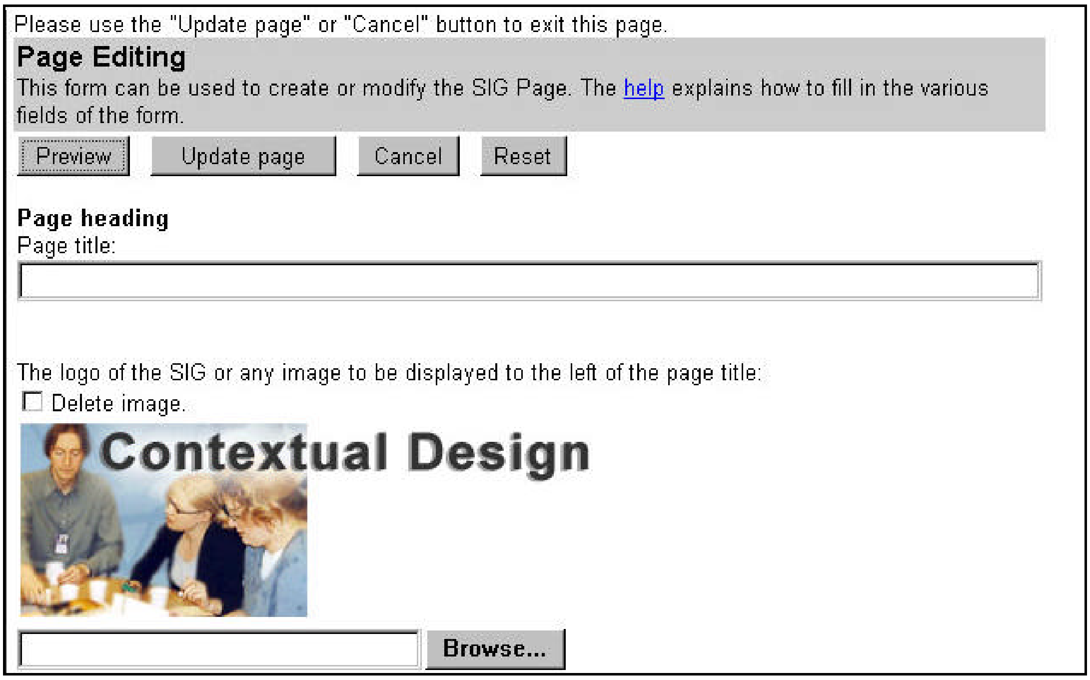
A viewing mode for a Formpage

The data entry form that is displayed in editing mode can contain fields for entry of different styles of text fields, images, links, lists, tables and files. The Formpage viewing and editing templates can be designed to satisfy the community's requirements.

The Formpage component is delivered with a number of predefined common pages such as tables, lists and news pages.

By default, Pl@za uses Formpage to create and deliver the following pages:

- The community page
- The Special Interest Group (SIG) and Committee pages



A view of the editing template for the Formpage in the previous illustration

2.8 Formpage Management

Formpage Management includes template and page management tools. With the help of these tools users with appropriate rights can design templates and forms for content providers (see Formpages in the previous section).

Formpage Management allows to browse for the formpages and formpage templates in the site. Users with formpage management rights can create, modify, copy and delete templates and pages. It is also possible to preview pages and view the source of templates. Page management also provides tools for managing folders where formpages and templates are stored.

Formpage Management is part of Pl@za 3.4 Additional Functionality.

2.9 Special Interest Groups and Committees

Pl@za provides a working environment and tools for different types of groups. Communities are usually divided into different types of groups such as committees, boards, local chapters and interest groups. Pl@za Special Interest Groups (SIGs) and on-line committees support this kind of group work.

Special Interest Groups and Committees are part of Pl@za 3.4 Additional Functionality.

Each Special Interest Group (SIG) is managed by a set of group managers. Each SIG has a page and a Group card (a modified IBC). A document folder and a discussion group, for which only members have access rights, can be created and links to them added to the SIG. The SIG manager can:

- Add members to and remove members from the SIG
- Create and modify the content of the SIG's page
- Modify the Group card

The Group card, which is a modified version of an IBC, acts as the shop window of the group for non-members. That is, it is the home page of the group. It can:

- List the members of the group and the group manager
- Describe the group
- Have images and links

The visibility of the information on the group card is controlled in the same way as the information on a member's IBC.

The membership of a SIG can be available on request, can require confirmation from the manager or can be controlled directly by the manager. The requests for membership are received as e-mail in the same way as user registration (see section 2.2, Authentication and Registration).

A committee is a type of group that is similar to a SIG. It offers more than the basic SIG. It has two managers (a chairman and a secretary) and two additional pages (an Officers' page and an Event page). Committees are listed separately from SIGs.

In addition to Committees and SIGs Pl@za makes it possible to create other types of groups as well (see section 2.19.3, Group types).

2.10 Event Management

The Pl@za Event Management service allows users to organize and publish events on the Web.

Event Management is part of Pl@za 3.4 Additional Functionality.

Members of the on-line community can view the event calendar (see the example below) and events register. Each event has its own event page, which describes the event in more detail. Events can be viewed in a list or in a visual calendar. The visual calendar provides day, week, month and year views to the events. Event can be viewed by event type. Event type is defined by using a specific event form when an event is created.

The user's registration status (registered or not registered) is displayed to each user on the event calendar and event page. A user can change the registration information or cancel it.

The viewing rights for events can limit what a user sees.

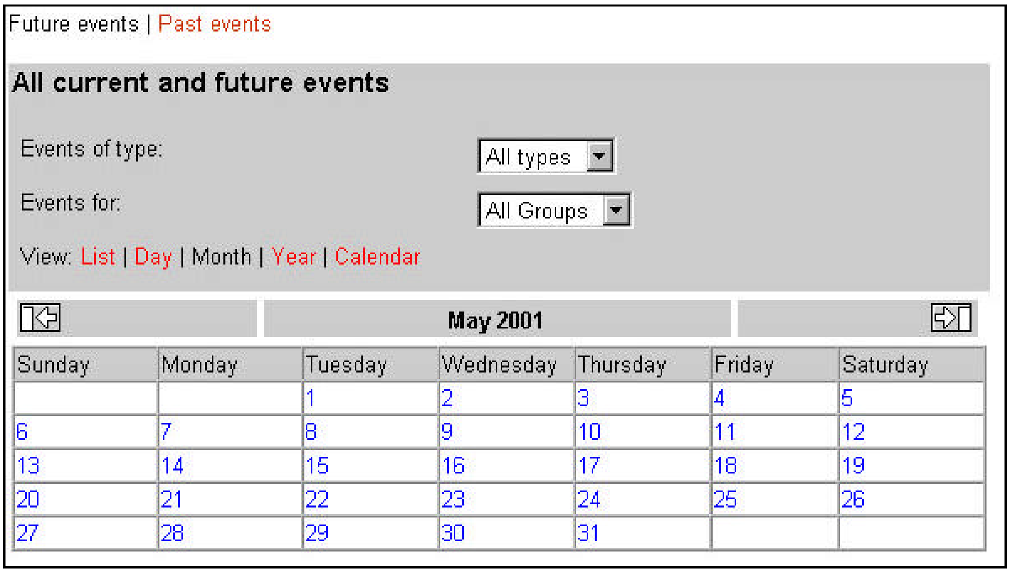
An event organizer can create a new event by choosing an event template from the event template archive. For example, there can be a template for annual meetings, monthly meetings, and training events. A new template can be created if a suitable one is not already available. Copying and modifying an existing event can also create a new event.

An organizer can choose a registration form for the event. There is a registration template archive where different types of templates are saved. A new registration template can be created if a suitable one is not already available.

An organizer can:

- Define when an event is published
- Pre-register target groups
- Define the visibility of the event and the attendee list
- Add the speaker
- Specify the registration deadline
- Remove an event from the event calendar.
  When removing an event an organizer can choose either to archive or delete the event. Archived events can be reactivated and brought back to the event calendar.

A discussion group and a document folder can be created and linked to the event.



A graphical calendar with filter options for viewing events of a month

2.11 Survey

Survey provides easy-to-use tools for setting up and managing on-line surveys and opinion polls. Surveys can be targeted to a specific group of users or the general public. They can have different levels of anonymity depending on the nature of the survey. Administration of a survey can be delegated to several Organizers.

The service provides basic statistics of responses received. The data can be exported in XML and CSV formats for more detailed analysis with other appropriate tools.

Survey is part of Pl@za 3.4 Additional Functionality.

2.11.1 Creating Surveys

Members of the Survey Administration group called Survey Organizers can create new surveys. When a Survey is created the Survey Organizer defines the deadline, anonymity level and the target group for the survey in addition to specifying the questions in the survey. A new survey can be created by duplicating it from an existing one.

Characteristics of a survey

The deadline date defines the last date when the survey can be responded to. After the deadline is met, the survey is automatically closed for the respondents.

Anonymity level defines how the responses to a survey are treated. It can be defined to be one of the following:

- The Organizer does not see which users have responded.
- The Organizer can see who has responded but does not know which user has made which response.

- The Organizer can see which respondent has made which response.

The Survey Organizer can define other Organizers who will also be able to modify and manage the particular survey.

A survey can be made visible to a defined group of users allowing only this group to respond to the survey or open to everyone. The visibility for a survey can be one of the following:

- Restrict respondents to people not logged into Pl@za
- Allow Pl@za users including guests to respond
- Allow Pl@za users excluding guests to respond
- Restrict respondents to a selected list of users

Defining the questions

The Survey Organizer can define a survey three different kind of questions: multiple choice, text and number value questions

Multiple choice questions can have several choices with only one or many selections allowed.

Text type questions allow the respondents to fill in free text responses either in a single line text field or a text box.

Number value questions allow the respondents to give a number value response to a question within the range defined by the Organizer.

2.11.2 Survey life cycle

When a survey is initially set up it is in a state where only the Survey Organizer can access it. Only in this state is it possible to add, edit and delete questions onto the survey. Nobody can respond to the survey when it is in the created state. Before publishing a survey the Organizer can preview it to see what it will looks like to the users.

Once a survey is published, the users who the survey is targeted to can respond to it. When a survey reaches its deadline it will automatically be closed. The Survey Organizers can also close the survey before the deadline is reached. Once the survey has been closed nobody can respond to it.

The Organizer can also archive a survey for future reference. A survey can be deleted at any stage of its life cycle.

2.11.3 Managing Surveys

Members of the survey administration group have the right to create new surveys and manage all existing surveys. Individual surveys are managed by Survey Organizers. A survey can have several Organizers. An Organizer can change the characteristics and view the results of the particular surveys of which he is an Organizer.

2.11.4 Responding to Surveys

When a survey is published it becomes visible to the group the survey is targeted to. After responding to a survey users can view their own answers but can not change them. Users are allowed to answer only once to a survey.

Notifications

Organizers and respondents to a survey can set notifications to be sent to them about changes in the survey.

2.11.5 Statistics

The summary of results for a survey is always available to its Organizers, and is made public when the survey is closed. The display shows the statistics of the responses to each question.

It is also possible for the Organizer to download the survey data including all responses in XML and CSV formats for more detailed analysis with other tools.

2.12 On-line Meeting

With Pl@za on-line meetings, members can meet on-line in groups or one-to-one. A member can invite any of the other members who are on-line at the time to join him or her in an on-line meeting. All discussions can be recorded in a file. An on-line meeting can also be set to be moderated. This means that all contributions to a discussion must be accepted by the moderator of the meeting.

The on-line meeting list page lists the active public meeting channels and the private ones that the member can access. Private meetings, to which the member does not have access, are not displayed.

From the list, a member can view more detailed information about a meeting, such as:

- A description of the meeting
- Access rights to it
- The participants
- Who created it
- Whether the discussion is recorded.

If a member joins a meeting a new window opens, into which a Java applet is loaded. A member can continue browsing the site while chatting in the On-line meeting window.

From the on-line meeting window, a member can switch to another meeting and send a private message to anyone in the on-line meeting.

The on-line meeting manager has access to all meetings and can modify their details. The manager can create and delete permanent meeting channels. A member can only create temporary meetings, which are removed when all the participants leave.

On-line meeting is part of Pl@za 3.4 Additional Functionality.

2.13 Payment System

Pl@za can support on-line payment for goods, using WorldPay's on-line payment system. Pl@za supports more than a hundred currencies.

Once a payment has been requested, the WorldPay system performs an authorization check to see if there are funds available or whether the account is on hold. It does this in real time and sends an acknowledgement to Pl@za, which displays a screen advising the user either that the transaction has been accepted or that there is a fault (perhaps a wrong number has been entered).

Pl@za is connected directly to WorldPay's systems by a secure encrypted connection.

WorldPay accepts payment from credit cards (Visa, Mastercard, JCB, Diners, Amex, and Delta). The community needs to set up an account with WorldPay.

There are documents that describe how to:

- Set up a connection with WorldPay
- Configure the items that can be bought in the Pl@za system
- Set up an account with WorldPay

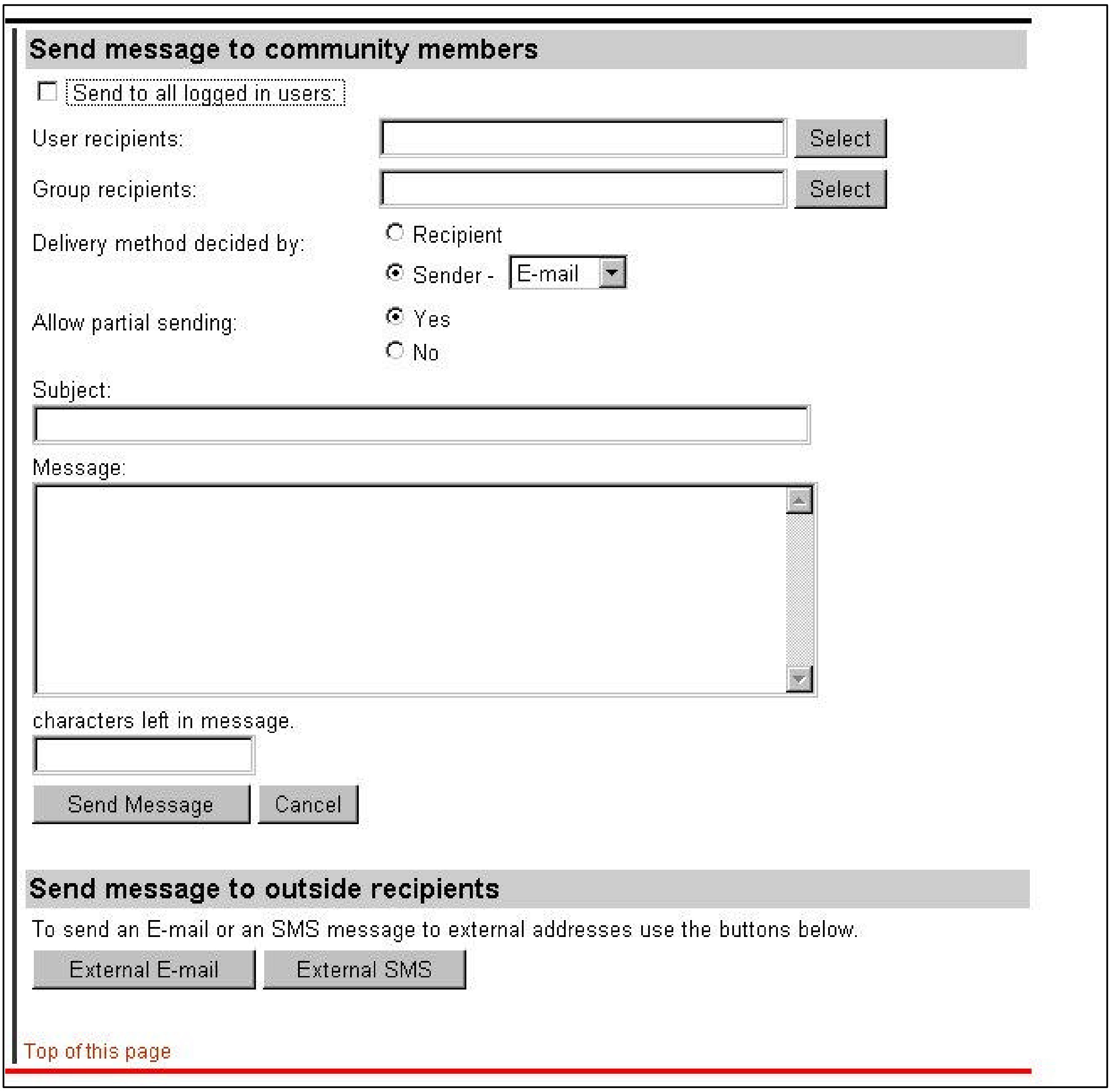
These documents are listed in Chapter 4, Pl@za Documentation.

Payment system integration is part of Pl@za 3.4 Additional Functionality.

2.14 Messaging

The Pl@za messaging service allows users to send different types of messages (e-mail, SMS and on-line messages) to groups, other users and people who are not members of the community. An example of a Send message page is shown below.

Messaging services are part of Pl@za 3.4 Additional Functionality.



A view of the messaging service

From the Send message page, a user can:

- Search for and select other users and groups in the system to send a message to
- Choose the type of message to send

When partial sending is allowed, the system sends the message even if it cannot send it to all recipients. When partial sending is disallowed, the system sends the message only after checking that all recipients can receive it.

A messages to multiple users can be sent as bcc (blind carbon copy) where the recipient see only themselves as the recipients of the message. This enables for instance sending messages to a group without revealing the members of the group to the recipients.

A recipient can only receive a message by a certain method if he or she has chosen that method as one of the communication preferences on the user preferences page (see the illustration of a view of a user preferences page).

2.14.1 Message Centre

Pl@za Message Centre allows Pl@za users to communicate with each others using an internal messaging system. Users can use Message Centre to:

- Receive messages from other users of the system
- Receive invitations to join a discussion in an on-line meeting

Message Centre allows users to reply to messages they have received. Replying to a message uses the send message facility.

An alerting facility in the standard layout informs a user of new messages in the Message Centre.

2.15 Notification Service

The Notification service provides the users with a facility for receiving notifications about changes on the Pl@za site. Users can configure which changes they want to monitor. This is managed through user preferences.

Users can configure a summary of the changes to be sent to them by e-mail. Additionally, when users log in to Pl@za they are shown the changes that have taken place since they last visited the site. Users can also check what changes have taken place while they have been logged in. When users log out both sets of changes are displayed.

Users can receive notifications about the following changes in the system:

- New discussion groups created
- New messages posted in their selected discussion groups
- New documents uploaded/created in selected document folders
- New surveys
- Changes in formpages
- New members registered (that is, new user accounts created). This information is not included in the e-mail summary.

Notifications are part of Pl@za 3.4 Additional Functionality.

2.16 Preference Information

Users can set their preferences in the Preference section, which consists of three different pages: General Preferences, Notification Preferences and Subscribe to Services.

Preference information is part of Pl@za 3.4 Standard Edition.

2.16.1 General Preferences

The General Preferences include:

- The language in which the templates are displayed. (If only one language is used in the site, 'System default' is shown)
- The communications methods by which the user wishes to receive messages and, of those methods, the one that is the user's preferred -method (e-mail, SMS or Messenger). This is the way that the user would prefer to receive messages from other members of the community

2.16.2 Notification Preferences

On the Notification Preferences page, users can view the list of discussion groups and document folders for which they have chosen to receive notifications. Here, users can set the option to receive notifications about new members registered on the site. Notifications for discussion groups and document folders are set in the corresponding services but can be disabled from here.

Users can:

- Configure that notification summaries should be sent to them by e-mail
- Set how often the notification summaries should be sent and set the starting date
- Set the format of the e-mail message (plain text or HMTL)

2.16.3 Subscribe to Services

By default, a new user is given access to some services. A new user can also subscribe to others. The services that need subscriptions are: On-line meeting, Discussion Groups, Document Folders and Interactive Business Card.

This makes it possible for users to be charged according to the services they have subscribed to.

Pl@za can be modified so that all services are available immediately. Groups can also subscribe to services, making the services available to all group members.

2.17 Search

Pl@za 3.4 Standard Edition offers comprehensive search capabilities.

2.17.1 Content Search

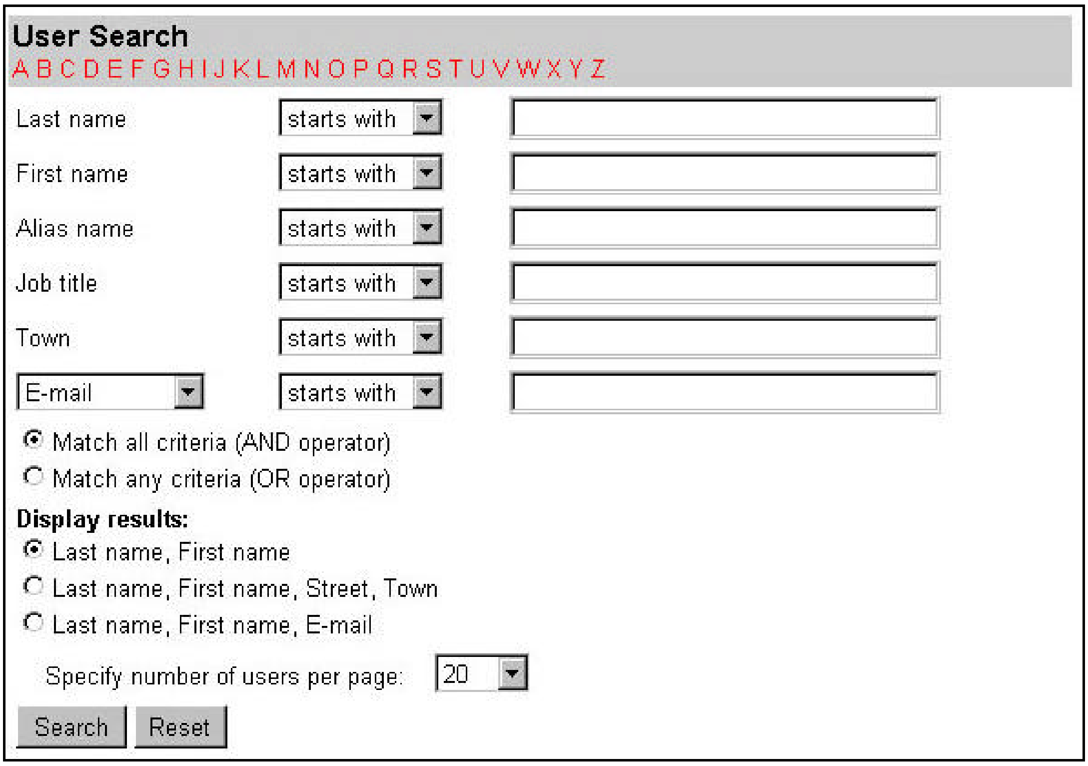
Pl@za provides a comprehensive search facility enabling information to be searched from the following services:

- Discussion groups
- Document folders
- Formapages
- Static HTML pages
- Help pages.

Search supports simple and detailed searches, prefix searches and more complex query syntaxes. Search also makes use of a stop word file of worlds that should not be added to the index, thus improving the quality of search results. A Finnish Stemmer is available as an optional component.

2.17.2 User Search

There is a separate search for users and for groups. Both user and group searches support multiple search criteria.



A view of a user search

The fields examined in the user search are: Last name, First name, Alias name, Title, Town, and one of the other items on the My info IBC (that is, e-mail, work phone, home phone, mobile, fax, pager, building, street, locality, county, post code, country, or note). Fields can be left empty if no criteria are needed for them. For example, if someone fills in only the town name, the result of the search will display everyone living there.

In the group search, the search criteria can be a group's name and/or its manager.

In both searches, there are links to the lists of users or groups that start with a certain letter.

A user can choose one of the following options for matching each field:

- Starts with
- Ends with
- Is
- Contains

The user can also choose whether they should be treated as AND (where the result must match all the criteria) or as OR (where the result must match only one of the criteria).

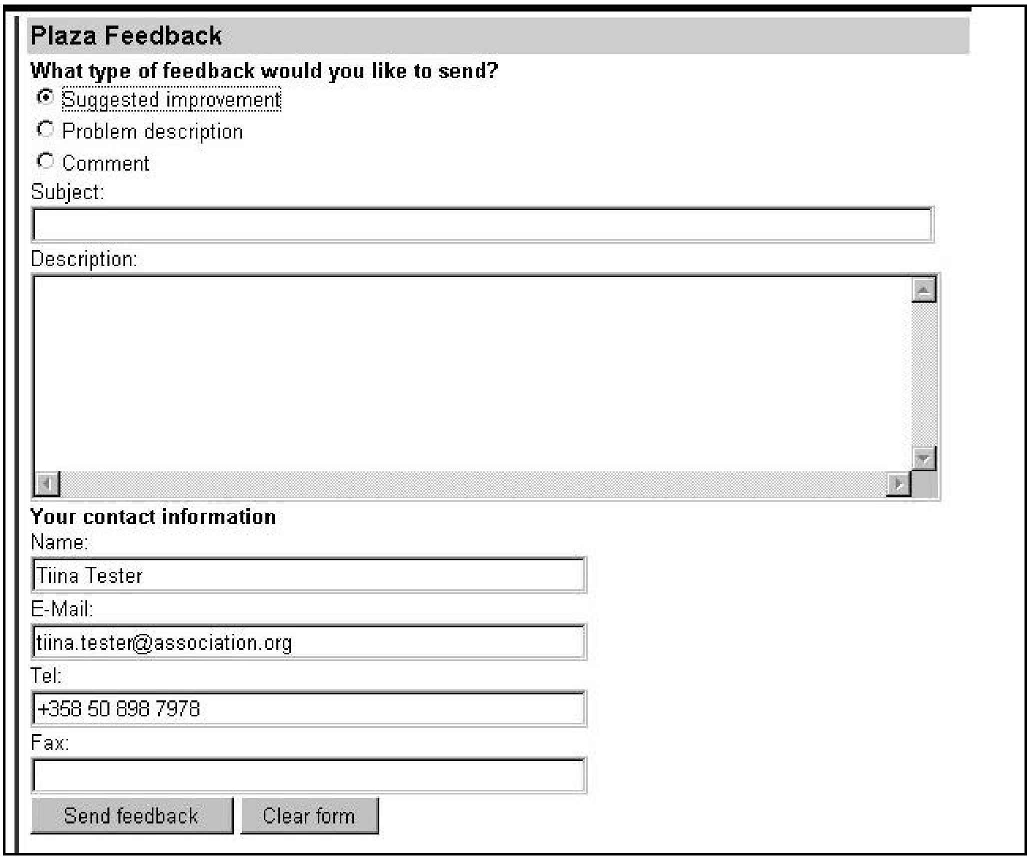
The user can also choose the way the result is displayed.

The group search is similar to the user search, although it has fewer fields to search, as the Group card has fewer fields than an user's IBC.

If a community wishes, the search templates can be customized to allow its members to search on a different subset of the IBC.

2.18 Feedback

Feedback can be sent through a feedback form (see the example below). Feedback is part of Pl@za 3.4 Standard Edition.



A feedback form

Both registered and non-registered users of the system can send feedback.

By default, Pl@za has the following three categories defined for different types of feedback:

- Improvement suggestions
- Problem description
- Comment

The different types of feedback can be forwarded to different places. The feedback can go to a responsible person's mailbox, into a file, or into a discussion group.

The feedback form, its access rights, and its recipients can be modified.

2.19 Help

There is a help file available for each Pl@za service. Users can access the service specific help file when they use the service.

A Help button on the page opens the help text in another window.

If the services are customized, the help pages should be changed to describe the new functionality.

Help texts are localized with master templates.

Help is part of Pl@za 3.4 Standard Edition.

2.20 External Data Storage

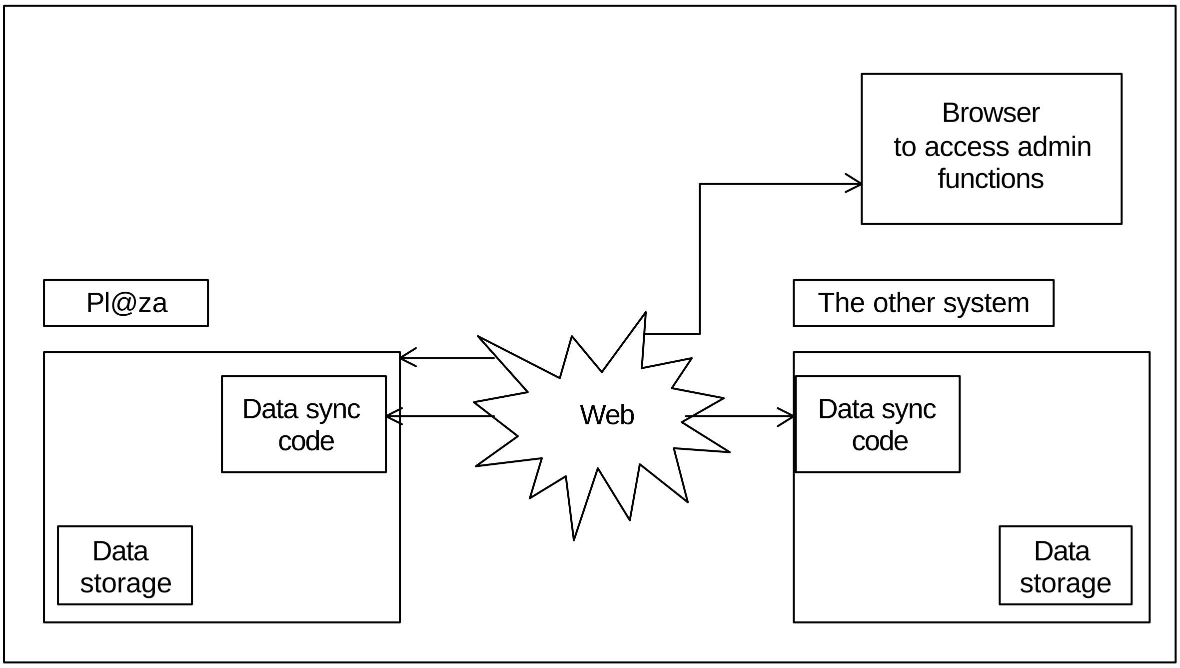
2.20.1 Data Synchronization

Data stored in another system, such as a back office membership database, can be synchronized with the data in a Pl@za system. User, group and event management data can be synchronized. However, code must be added to the external system to control the synchronization.

The information is moved between the two systems as data blocks called databites. A databite describes the changes made to the data in a given time period. XML is used to encode these databites. Synchronization, which is driven by the external system, occurs at regular intervals. An administrator can view the databite before entering the data into the external system.

The external system uses HTTP, the standard web protocol, to make its data synchronization requests to Pl@za. As a consequence the administrator can also control data synchronization using a browser. The administrator can call the same functions as the external system, that is:

- Download
- Upload
- Delete
- List databites from Pl@za
- Produce Pl@za databites
- Apply databites to Pl@za
- Abandon a databite production or application
- Get the status of a databite production or application
- Access the Data Synchronization log files



Pl@za data synchronization diagram

Data Synchronization is part of Pl@za 3.4 Additional Functionality.

2.20.2 Storage of User Information in a Relational Database

User, group and event information can be stored in a directory server, a relational database or file store.

Pl@za can be configured to store this information in a relational database accessed via an appropriate JDBC (Java Database Connectivity) driver.

Pl@za has been validated with the Oracle JDBC driver for Oracle 8 and 8i databases and can, in principle, be configured to work with other JDBC-accessible databases.

With configuration and modification, different user data fields can be stored in a database and database items displayed in Pl@za service templates. Database reports can be designed to inform a community about its membership.

2.21 Administration

Pl@za provides a predefined set of administrative roles and tools. These roles and tools are created to support the administration of a community. All the administrative tasks performed by these roles and tools can be done through a browser.

The roles are: User Administrator, Group Administrator, Document Folders Administrator, Discussion Groups Administrator, Event Management Administrator, Survey Management Administrator and System Administrator. These roles can be given to several users.

A User Administrator has the right to add members to and delete members from the system. A User Administrator can also modify users' IBCs.

A Group Administrator has the right to manage all the groups in the system and add new ones.

A Document Folders Administrator owns the main folder of the Document Folder structure. A Documents Folders Administrator can modify all the folders in the document hierarchy.

An Event Management Administrator owns the event calendar and has rights to create, modify and delete events. An Event Management Administrator can also register users on an event.

A Survey Management Administrator has rights to create, modify and delete events.

A System Administrator is the super user of the system. A System Administrator has the same rights as the other managers. He or she can also modify all the system files and templates and can stop and start the server.

The available administrator tools are the SIG, Committee, and On-line meeting management tools and a resource tree editor. By default, these tools are available only to the System Administrator in Pl@za.

With the SIG and Committee management tools, the System Administrator can create new SIGs and Committees and modify or remove existing ones.

On-line meeting management allows the creation, modification and deletion of meeting channels, as described in section 2.12, On-line Meeting.

The resource tree contains all the system files, that is, the layout, template, configuration, and property files. The resource tree editor allows admins to modify these files.

Other roles and access rights can be defined.

There are also administrative tasks (backups, installation and upgrades) for which server access is required. The system files and resource tree can also be accessed from the server. A detailed description of these server functions is beyond the scope of this document. See Chapter 4, Pl@za Documentation, for a list of the available documentation on the subject.

System, user, and group administration are part of Pl@za 3.4 Standard Edition.

2.21.1 Changing Passwords

Users can request new passwords by clicking on the "New password" link in the log-in page. Pl@za can be configured to send the request by e-mail to a predefined person or to automatically generate the user a new password. The user is primarily identified by his or her e-mail address, which is also used for returning the response to the request. The person responsible for passwords can grant a new password to the user.

The User Manager, System Administrator and the user can change the password by modifying the registration information.

2.21.2 Pl@za System Groups

It is recommended that access rights to the different services be defined at group level. This supports the community structure and also makes administration easier when the system is running.

System groups in Pl@za are defined so that the child group always inherits the access rights of its parent groups. This allows the building of a similar group structure into the system as in real living communities.

Each system group also has a Group Manager, who can modify a group by adding, modifying, and deleting users.

There is also a user group for the subscribed services; for example, the group of all users who have subscribed to the Discussion Groups service. A pseudo-group [users] exists that includes all the registered users in the system. This group can be used to define access rights and administer the system.

2.21.3 Group types

Pl@za provides the facility to create different types of groups in the system. A group type acts as a template to new groups that are created based on that group type. A group type can have its own specific set of attributes and IBC cards.

2.22 Knowledge Browser™ powered by BTexact Technologies

Using BTexact's novel agent technology, Teamware offers an intelligent system for managing and utilizing information resources over the Internet

This system consists of four different end user services Expertise Locator, Personalized Newspaper, and Reference Provider that use Profile Management functionality to provide user with relevant and timely information.

Knowledge Browser™ services are part of Pl@za 3.4 Additional Functionality. Knowledge Browser is available on Solaris and Windows platforms.

2.22.1 Profile Management

Profile Management stores user interest information in a hierarchy in which interests lower in the hierarchy can inherit their parent interest's characteristics. The profile is transparent to the user, who has complete control of what it contains.

The user profile contains two main components: contact details and an interest profile. These are regarded as separate components, which enable contact details to be stored separately from interest profile.

Contact details. The minimum essential contact details consist of name, address, phone number, fax number, e-mail address, and homepage information. Other information may be provided, along with appropriate access and API methods. This information can be used for making contact with a user in order to obtain or share unpublished information.

Interest Profiles. The Interest Profile is the core of the user profile and provides the information necessary for the agent applications to perform their tasks. Interest profile information consists of a number of categories with associated information. The information that is provided by the interest profile

- Includes a list of interest categories and keywords/phrases contained within the profile

- Can be selected from a pre loaded set of interests or created from scratch.
- Shares interests depending on privacy specifications
- Includes attributes associated with each interest category:
  - Privacy setting (private/restricted/public). In the case of an interest labeled private, no other user can know that the user has this interest. On the other hand, restricted and public interests can be shared openly with a group member and all users respectively.
  - Expertise rating (5 grades from curious to expert). This specifies the user's skill in the field of this interest, currently self rated. The curious label is the lowest level, and this means a user is not so familiar with the subject just interested in it. On the other hand the expert label shows a user is an acknowledged expert in this area.
  - Importance rating (high/medium/low). This shows how important to a user this interest is – this priority setting may change when the user is engaged in different tasks (or assignments at work). The interest labeled high is quite interesting for the user and he/she wants to know more about it than the other interest categories.

Personal profile functionality is required as a basis for Personalized Newspaper, Expertise Locator and Reference Provider services.

2.22.2 Personalized Newspaper

The Personalized Newspaper is a personalized newspaper that provides news articles that are relevant to the user's interest profile. The Personalized Newspaper performs more than a simple search of news feeds, as it makes use of importance and expertise information associated with each interest to modify the search criteria. The Personalized Newspaper attempts to find more news articles for important interests, as these are more relevant to the user. Users can optionally receive article headlines and summaries through e-mail.

The selected news articles are classified in the user's interest categories and sorted by importance rating set by the user. Therefore, a user will easily find the most interesting articles. A headline of each news items links to the full article and the Personalized Newspaper provides. Some options at the end of the full article, such as finding other people with interest/expertise in the same topic, or e-mailing the article to an associate. A user can also elect to update his/her profile with characteristic keywords occurring in the article, which are automatically extracted by the Personalized Newspaper. Thus, the user profile is semi-automatically updated, so that it remains under the user's control without adding undesirable keywords.

2.22.3 Expertise Locator

Expertise Locator is an agent designed to locate people with common interests to facilitate networking among community members. When a user queries Expertise Locator to find users with interest in certain topics, Expertise Locator returns a list of matching users within the user community, along with their e-mail address, interests, skills, and expertise levels. Searches are performed against the latest, dynamic user profiles. Of course, the search results are filtered according to privacy ratings – i.e. if a user is located, but he/she has specified an interest as private, that person will not be included in the result.

Expertise Locator can show results by sorting with matching strength, expertise, and importance level, so that a user can easily find other relevant users according to his/her aim.

2.22.4 Reference Provider

Reference Provider is an information-finding and a just-in-time information delivery agent. Reference Provider makes use of a number of information resources such as news reports, FAQs, and also the other personal agents, i.e. the Personalized Newspaper and Expertise Locator, to present appropriate information to the user at the right time. Naturally, a user can select the desirable resources by specifying a service name (e.g. Reuters News) or a service type (e.g. News articles type) of his/her desirable resources.

Reference Provider monitors the user's current activity (at present within MS Word) and uses text near the current position or a selected sentence in the document to find material that might be relevant.

3 Deliverables

The Pl@za 3.4 (Solaris and Windows 2000) release consists of the following software packages:

- Pl@za 3.4 Core Software
- Pl@za Search 1.1
- Finnish Stemmer 1.0
- Pl@za Event Management 3.4
- Pl@za Data Synchronisation 1.3
- Pl@za Survey 1.1
- Pl@za Document Management System (dman-lite) 1.2
- Pl@za SMS Server – Evolving SMS Server for Teamware v.2.01 (not changed since Pl@za 3.2 release)
- Pl@za Simplified INN News Server 1.0 (not changed since Pl@za 3.2 release)
- Pl@za WorldPay Integration 1.0 (not changed since Pl@za 3.2 release)
- Knowledge Browser for Pl@za

The Pl@za 3.4 Core Software package comprises the main Pl@za package, installation and setup guides, release notes and documentation.

The Discussion Groups service needs an NNTP news server to store messages; Pl@za Simplified INN News Server 1.0 (based on INN v.2.2.2) is recommended. DNEWS News Server is recommended on Windows 2000 platform.

PDF indexing in Document folders requires XPDF software.

For SMS messaging, the Pl@za SMS Server Software package is required. This package includes the Evolving SMS Server for Teamware 2.01.

Finnish Stemmer 1.0 requires Morfo® language techology by Kielikone Oy. Morfo is a trademark of Kielikone Oy. Finnish Stemmer is available only on Solaris.

Knowledge Browser requires agent-based intelligent information management components by BTExact Technologies.

Systems with fewer than 500 users can use the file system for storing user data. Larger systems need an LDAP directory; iPlanet Directory server 4.1 is recommended or a relational database; Oracle 8 or 8i is recommended.

Pl@za can be run on two platforms, either on a Sun Sparc Server with Sun Solaris 7 or 8 as the operating system or on Windows 2000 as the operating system. JAVA™ 2 Runtime Environment, Standard Edition Version 1.2, TCP/IP networking, DNS, and mail feed must be configured on the server.

4 Pl@za Documentation

This chapter lists and describes additional documents that include further information on running, modifying, and administrating a Pl@za system.

The documentation is part of the Pl@za package. It is located in the Pl@za system at http://<*system name*>/Resource.phx/plaza/product_info.htx

The documents are in the following main categories:

- **Release Documentation**

  The Release Notes document describes the new features in the release, related products, recommended browser versions, cleared problems, known problems and system limitations.

  The Installation and Site Setup guides provide instructions on setting up a Pl@za system.

- **Customization Documentation**

  This section consists of a number of how-to documents describing how to customize the different areas of Pl@za, explain the template structure, describe the various tags and their use etc.

- **Help Documentation**

  This section provides access to all of the Help documentation in Pl@za.