



Editorial

With the publication of *Doing Business with IBM Connections* six months ago, I finally completed something that had been on my list since 2010. I had been looking for a way to explore the usefulness of IBM Connections to organizations, and to examine ways that people could make practical use of Connections in their daily work. Based on the feedback I have received from many readers, the book hits that mark—and that's great.

However, there is so much more to be explored, examined, and shared. I have been wrestling with how to keep the ideas flowing across a growing network of people who are similarly interested in maximizing the value of IBM Connections. While a second edition of the book will make sense at some point in the future—aligned with IBM's continued investment in expanding and refining the product—that time has not yet come. Hence this newsletter.

In this first edition of the newsletter, you will find three core ideas. The first is on managing the profile lifecycle by integrating with your current directories. In the book I talk about how to

encourage employees to fill out their profiles, and in the article herein I present a couple of case studies of how ISW, an IBM Premier Business Partner in Australia, has been helping its customers with profile management. The second idea is on the value of integrating calendar information into IBM Connections, and looks at the offerings from IntraVision, an IBM Premier Business Partner in Denmark. Finally, I review some of the key updates to Connections that IBM has released in recent months.

I have included opportunities throughout this newsletter for you to engage with me on your work. If you have an example of how IBM Connections has been used to great effect in your organization, I would love to hear it. If you have been integrating other systems with IBM Connections to expand the benefits achieved by your employees, I would love to hear that too. Or if you have a question about maximizing the value of Connections in your work, ask away.

*Michael Sampson is a Collaboration Strategist. He advises organizations around the world on making collaboration work, with key focus areas of culture, governance, and adoption. Michael is the author of six books on making collaboration work, the latest being *Doing Business with IBM Connections* (2013). Contact Michael at michael@michaelsampson.net.*



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Managing the Profile Lifecycle

In Chapter 6 of *Doing Business with IBM Connections (2013)* I talk about the importance of having profiles up-to-date in IBM Connections. In the chapter I lay out a pragmatic approach for individuals to follow in order to achieve a first cut of their profile within 15 minutes. In the advanced concepts section of that chapter, I also note some additional ways for getting profiles filled in, including the integration of data from other systems. ISW, an IBM Premier Business Partner located in Australia and active globally, is frequently called on by customers to help with these more automated ways of establishing a baseline of profiles and associated attributes. ISW uses a combination of IBM's Tivoli Directory Integrator and its own bespoke approaches. Here are two examples.

Retail: Managing Profiles in the Context of Significant Turnover

The retail sector faces significant and regular employee turnover. A Hay Group study from early 2012 pegs the annual turnover rate at 67% for part-time and 24% for full-time employees.¹

For retail customers using IBM Connections to bring its employees together, maintaining an accurate and up-to-date set of profiles is critical. For one of ISW's retail customers, the firm already had a couple of sources of up-to-date employee information. The firm's Domino Directory held core information on about 1,000 users, and its hosted HR system held data on additional employees, as well as complementary attributes for those employees in the Domino Directory. For example, for an employee listed in the Domino Directory, their job title, department, and roles were authoritatively held in the HR system, but not in the Domino Directory. The firm wanted a way of populating the profiles in IBM Connections based on these two systems, without making modifications to either.

In consultation with the customer, ISW created an automated routine for maintaining up-to-date profiles in IBM Connections. Once a day, the HR

system automatically creates and exports a list of all employees who should have a profile in IBM Connections. This export is posted to a secure location, and then retrieved for processing by the ISW routine. The exported file is analyzed, compared with the list of people in the Domino Directory, and then compared to the current data in IBM Connections. Whenever changes are identified, these are pushed through to IBM Connections. Often this involves adding new people to IBM Connections, or marking a profile as inactive. It also involves updating job titles, department names, and the relevant roles a given person fulfils.

One of the risks ISW had to mitigate is the handling of exceptions and errors in the export file. For example, if the HR system exports a

duplicate record, the ISW integration approach needs to identify this and prevent the duplicate from being created in IBM Connections. Or if the HR system suddenly reports 1,000 fewer people than the night before, there is an automated escalation to query if this is actually correct before proceeding.

The retail sector faces significant and regular employee turnover—at 67% for part-time employees (Hay Group)

Utilities: Using Connections Profiles for the Company Directory

For a client in the Utilities sector, ISW faced a different challenge regarding profiles in IBM Connections. The client had almost 4000 employees, and while all of these full-time employees were present in Microsoft Active Directory, there were also another couple of thousand contractors who were not. While these contractors would never log into IBM Connections as such, the client wanted an enterprise-wide directory and cohesive phone list in IBM Connections.

ISW's approach involved touching a number of different systems. All of the employees in Active Directory were populated into IBM Connections, with a profile created for each employee. Since the client had a security system with employee photos for security badges, ISW also pulled through the current photo for each employee. Finally, there

¹ Hay Group, *Hay Group study finds employee turnover in Retail Industry is slowly increasing*, May 7, 2012.

www.haygroup.com/ww/press/details.aspx?id=33790. Hay Group has also published comparative rates for 2011 and 2012 for different employee groupings. These are available from the link above.

was a third database system that held additional attributes for employees—such as contact information and reporting lines—and these were integrated into the correct profile in IBM Connections. As with the retail customer, this is an automated process that runs daily, so as the employee base changes, the corresponding set of profiles in Connections are automatically updated.



A different approach was required for contractors. All contractors are listed in a database system, and ISW created a separate area in Active Directory to act as a temporary holding place for directory information for the contractors. With those details in place, standard routines in Tivoli Directory Integrator were used to import the information into IBM Connections. The net result is an integrated, cohesive enterprise-wide directory and phone list that automatically remains up-to-date with changes in employees and contractors.

As with the retail client above, the exceptions were the interesting part of the integration. What's the correct approach for a part-time employee who then becomes a contractor? Or what about a contractor who becomes a full-time employee? Noticing these exceptions and creating the appropriate routine to address each involves some upfront analysis, as well as ongoing monitoring.

ISW was able to leverage its expertise with IBM Connections to help the client address another challenge too. With security-controlled physical premises in various locations, providing a way for employees to advise of new vehicle purchases was an ongoing issue. Rather than give employees direct access to the security system, ISW used one of the hidden attributes in the IBM Connections profiles area to enter an up-to-date vehicle registration number. It is hidden in the sense that while the employee themselves can edit the attribute when the profile is in Edit mode, the attribute is not displayed for people to read. ISW

monitors for changes to this attribute, and on identification of such a change, will push that directly out to the security system, giving the security guards at each location an up-to-date list of permitted vehicles.

Conclusion

The centrality of people in IBM Connections requires that organizations invest appropriate effort in ensuring Profiles are up-to-date. Part of this calls for effort from each employee, and part calls for a systematic approach to maintaining profiles. ISW's experiences with helping customers are illustrative of the types of capabilities available and the approaches that are both practical and pragmatic.

About ISW

ISW is an IBM Premier Business Partner, offering services and solutions across the IBM portfolio. It has productized a number of add-on products for IBM Connections, including Kudos Badges. ISW won three IBM Collaboration Solutions Awards at IBM Connect 2013, including the *Best of Show* and *Chief Technology Officer* award. To contact ISW, visit www.isw.com.au.

Your Approach

How are you approaching the challenge of keeping profiles up-to-date in IBM Connections, whether by automated means or not? Please send your comments and experiences to michael@michaelsampson.net

Integrating Calendar Information in Connections

When Lotus Notes was released in the early 1990s, Jens Overgaard Dinesen was newly working at Arthur Andersen. As one of the early adopters of Lotus Notes, Arthur Andersen needed people who could champion the use of Notes through internal education and training. Jens stepped into that role, and over the next few years made a significant contribution to how Arthur Andersen leveraged the power of Notes. Some years later Jens left Arthur Andersen and founded IntraVision with a few colleagues to take Notes more widely into the market. One early customer of IntraVision asked for a better way of working with calendar information in Lotus Notes, given the core functionality didn't

provide what the client needed, and neither did any of the other 19 add-on calendaring packages for Notes. The team at IntraVision went to work on a new way of handling calendar information, and the OnTime Group Calendar was the result. That product continues to be used across the world to this today, and has been updated many times over the past 15 years.

The OnTime Group Calendar extends the core calendaring capabilities in Lotus Notes and IBM Notes. These capabilities include better visibility of calendar availability for colleagues, improved performance for calendar information across distributed Notes environments, and simpler ways of promulgating calendar events across groups, locations, and departments. IntraVision has recently extended OnTime to support enhanced calendaring in Office 365 and Microsoft Exchange Server as well.

I set out this historical context to establish a sense of the pedigree behind IntraVision's current work with integrating calendar information into IBM Connections. IntraVision is a long-term established player. It has been around. It has seen what does and doesn't work.

The OnTime integrations for IBM Connections bring the same approach of making calendaring work for employees and organizations into the Connections environment.

Integrating OnTime with Connections

The OnTime integrations for IBM Connections bring the same approach of making calendaring work for employees and organizations into the Connections environment. At this time, there are three standard points of integration. The first is with each individual's profile, whereby their current calendar is displayed in the right-hand navigation pane of their profile. There are security settings that can be used to set permissions for who can and can't see their calendar. This means that a colleague looking at a profile can immediately get a sense of the person's availability (via meetings scheduled for today and upcoming days) and focus (via color-coding of events).

The second integration adds an awareness into an IBM Connections community of the upcoming

calendar for community members (see *Figure 1*). Communities in IBM Connections are increasingly used for running projects, and being able to see which community members are available immediately or shortly helps with addressing the never ending

question of available time slots for real-time interaction. Of course presence information from IBM Sametime gives a snapshot view of current availability, but calendar information overlays a much richer perspective on current and upcoming availability—which helps with making decisions on when to engage with fellow project members.

The third integration is also displayed within a community in Connections. It provides an at-a-glance snapshot of current availability for community members. This is based on an algorithm developed by IntraVision to summarize calendar availability. This availability snapshot is displayed in the right-hand navigation pane of the community (see also *Figure 1*).

While these three integrations into IBM Connections are a great starting place, it is only the beginning. IntraVision is actively engaging with its customers to explore other standard integration points, and the OnTime Group Calendar includes capabilities that enable customers to develop their own integrations as well—with Connections and

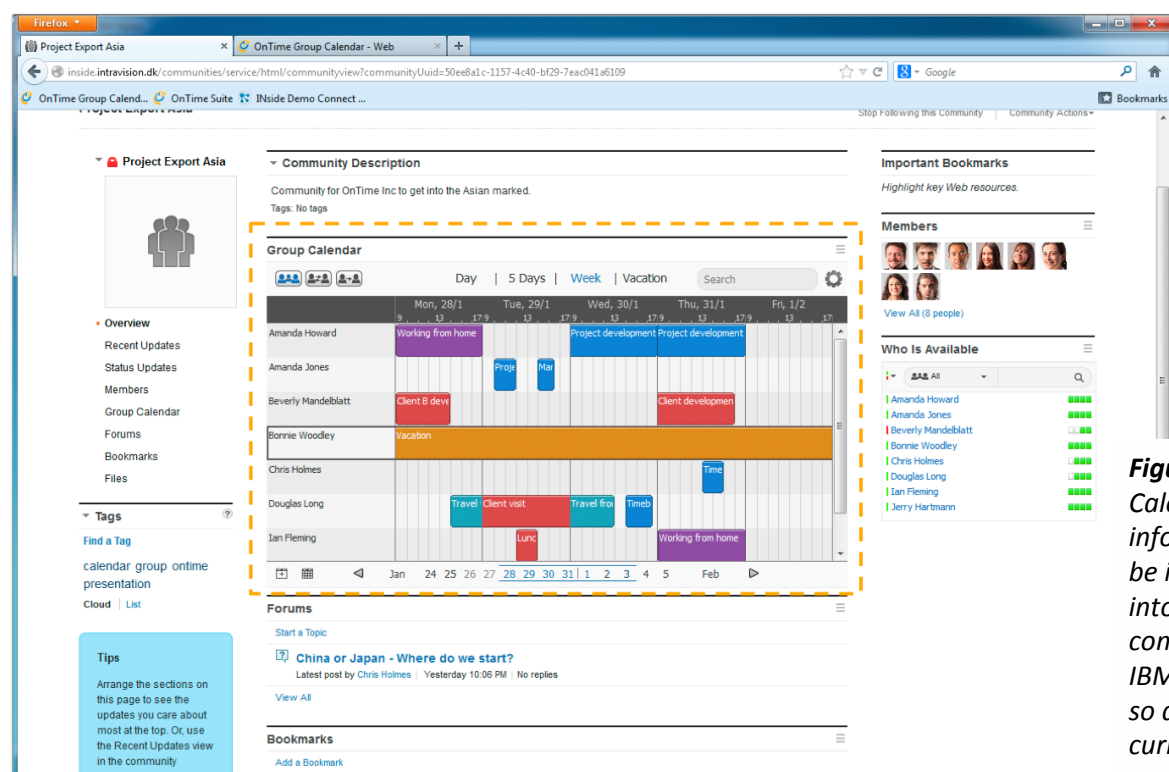


Figure 1
Calendar information can be integrated into a community in IBM Connections so as to display current and upcoming commitments of community members.

other systems too. For example, one client in the insurance industry uses OnTime to integrate appointments for insurance agents that are made in their Siebel system with IBM Notes. This gives agents a single view of their calendar, and enables employees who are not insurance agents to participate in meetings with the agents.

Two Perspectives on Calendaring in Connections

We can think about IntraVision's current work in a number of ways, but two will suffice for our analysis here. The first is that social business and collaboration platforms like IBM Connections champion a change in culture and work practice to working "in the flow." In other words, as things show up, employees complete them immediately and move on to the next challenge. What is valuable in this flow-based approach to work is the increased efficiency with getting things done. Clearly this will impact metrics such as time-to-market and responsiveness. However at the heart of this change remains the requirement for visibility into which of your colleagues are available immediately to lend a hand, or if none of them are directly relevant, who else across your organization can help based on their skills and availability. This is what IntraVision has delivered with its three integrations for IBM Connections.

The second way of thinking about IntraVision's integration with IBM Connections is to stand back from the capabilities of Connections and remind ourselves that calendaring information has been a core tool for organizing collaborative work for a long time. Knowing what each person is going to be doing at a particular time in the future, and having a way of easily sharing that with other interested and affected parties is essential. These integrations bring forward the calendaring approaches that are already working in organizations today, and integrates them with this new locus of work.

About IntraVision

IntraVision ApS is an IBM Premier Business Partner based in Denmark. It is actively working with customers across the IBM portfolio. See www.intravision.dk for corporate information, and explore the OnTime suite of calendaring and meeting products at www.ontimesuite.com.

Your Approach

How important is integrating calendaring information into IBM Connections in your organization? How have you approached this challenge? Please send your comments and experiences to michael@michaelsampson.net

Recent Updates to IBM Connections

IBM continues its relentless drive to add more capabilities to IBM Connections, and refine those that are already there. This covers both IBM Connections 4.5 and the SmartCloud version.

Updates to IBM Connections

In September, surveys and polls were added to IBM Connections 4.5. These capabilities have been available for some months as an extra cost add-on, but from late September they are included for free in the base product. Surveys and polls work in communities, and give capabilities to:

- Write a survey to gather feedback from community members.
- View the survey responses as a chart or table, or export them to a spreadsheet for analysis.
- Feature a survey in one of the navigation panes.

Updates to SmartCloud for Social Business

IBM has separately released a series of updates to SmartCloud for Social Business, its hosted version of IBM Connections. It is important to maintain an awareness of what IBM is doing with SmartCloud since these capabilities will be delivered in the next major version of IBM Connections—most likely called Connections 5.0. Some of the new capabilities include:

- A revised layout for the homepage, to streamline access to information in Connections, and make it easier for employees to focus on what's important. Community owners also have greater control over what members see when visiting the community.
- @Mentions are extended into blog posts and ideation blogs, to create new ways of bringing people into a conversation or discussion.
- Additional notifications can be sent out to mobile devices, to bring the right people into current activities.

For more, see Luis Benitez's blog post and slide deck on the coming changes, at www.lbenitez.com/2013/11/ibm-connections-november-2013-release.html. Mr. Benitez is one of the product managers for Connections at IBM.

Insights on Connections (November 2013)

Success with IBM Connections

To help you successfully navigate the business and human aspects of achieving value from IBM Connections, we offer three core resources.

Doing Business with IBM Connections (2013)

Michael's book, *Doing Business with IBM Connections*, is a 400-page exploration of the many ways people can make use of the power of IBM Connections in their day-to-day work. The book examines how Connections can be used to support ten core collaboration scenarios, including document co-authoring, managing meetings, and running projects.



Order your copy now, available exclusively from www.michaelsampson.net/doingbusinesswithconnections.html.

In-House Workshop

Bring together 15-25 of your people for a two-day in-house working session to plan your business and human strategy for IBM Connections. The two-day workshop is presented and facilitated by Michael Sampson, and builds on the frameworks and strategies presented in Michael's recent books.

View the workshop agenda at www.michaelsampson.net/doingbusinesswithconnections-workshop.html.

Professional Services

Engage with Michael for a longer-term project to help with maximizing the business and human value of IBM Connections in your organization.

Please contact Michael via the web site at www.michaelsampson.net/contact.html.

About Insights on Connections

Insights on Connections is a publication of The Michael Sampson Company Limited for people interested in maximizing the business and human value of IBM Connections in their organization. It builds on the theory, scenarios, and approaches presented in *Doing Business with IBM Connections (2013)*, authored by Michael Sampson. For more on the book, see www.michaelsampson.net/doingbusinesswithconnections.html.

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