# BEA WebLogic™®

# Portlets for Groupware Integration User's Guide

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# Introduction

## WebLogic Portlets for Groupware Integration

WebLogic Portlets for Groupware Integration brings collaborative functionality to an Enterprise portal. The portlets allow you to work with information stored on a Microsoft Exchange or Lotus Domino server. This is the information that you typically access with a Microsoft Outlook or a Lotus Notes client. Similar to these clients, WebLogic Portlets for Groupware Integration enables you to read email, send messages, organize contacts, schedule appointments, add tasks and more.

WebLogic Portlets for Groupware Integration gives you access to the following functionality in Microsoft Exchange and Lotus Domino:

| **Feature** | **Description** |
|---|---|
| Mail | Performs email functions such as sending and receiving email messages. |
| Calendar | Allows scheduling of appointments and meetings. |
| Contacts | Enables personal address book management. |
| Tasks | Provides personal task list management. |

# What's New

WebLogic Portlets for Groupware Integration sets a new standard for enterprise-level integration of Microsoft Exchange and Lotus Domino mail, calendar, contacts, and tasks with BEA WebLogic Portal, and provides features and enhancements for three portal audiences:

- Developers
- Administrators
- End-users

## For Portal Developers

- Flexible development environment with a model-View Controller architecture based on BEA WebLogic Workshop
- Quickly deploy and configure portlets with GUI/Page Flow Control
- Easier third party single sign-on integration

## For Portal Administrators

- Single configurable portlet increases portal flexibility
- Logging enables tracking of portlet execution
- Diagnostic portlets streamline troubleshooting and diagnosis of Service and groupware connectivity

## For Portal End-Users

- Enhanced user interface with additional features such as spell check and rich-text formatting
- Access and manage multiple Exchange or Domino accounts
- Internationalization and localization for Japanese, German, and French

# How to Use WebLogic Portlets for Groupware Integration

The Groupware Portlets allow you to access your email, appointments, contacts and tasks in either a single portlet instance or from multiple portlet instances. Your Portal Administrator will determine how many portlets you will use.

Once you, or your Portal Administrator, have set up your MS Exchange or Lotus Domino account in the portal, you can access all the features and personalize the portlets to meet your specific needs.

For more information, see "Personalizing the Portlets" on page 7-1.

## Single Portlet Instance

In the single portlet instance, the first view you will see is the Home Summary view. From this screen you can get summary information for your calendar, tasks and mail messages. In this view the small "home" icon is highlighted at the bottom of the portlet.

You can scroll through the other portlets by clicking on the appropriate icon to the right of the home icon. There are six, one for home, mail, calendar, contacts, tasks and options. Each one is highlighted when you are in that view. To maximize any portlet and access the full array of features, click on any item inside the summary view of the portlet, or the appropriate arrow icon to the left of each view.

## Multiple Portlet Instances

With multiple portlet instances, there will be summary and maximized views for Mail, Calendar, Contacts and Tasks. You will be able to personalize each portlet from inside the maximized view.

There are home, or miniature, views of each portlet which provide overview information. You also have the option of including a Summary view which encapsulates recent information contained in your calendar, mail inbox and task list. From this view you can see a week's worth of appointments, how many unread messages are in your mail in-box and what tasks are due or over due.

- The amount or type of information contained in the home views can be personalized in the Options portlet. For more information, see "Personalizing the Portlets" on page 7-1.

Clicking on any of the links inside any home view will maximize that particular portlet and allow you to manage that piece of information.

CHAPTER 2

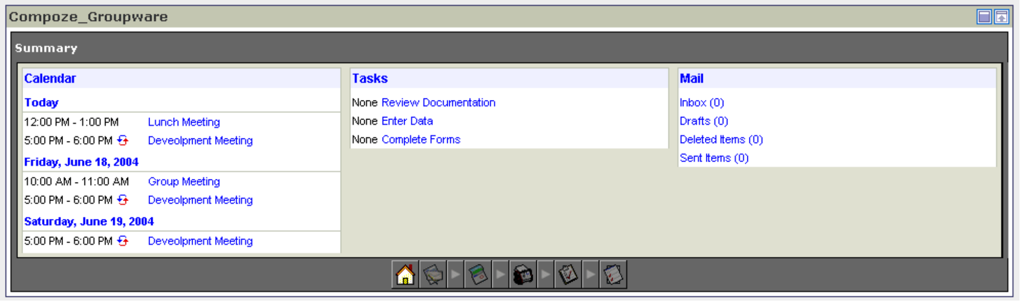
# Home

The Home page displays summary information for the Calendar, Tasks, and Mail. It is also the starting point to navigate to additional pages that contain detailed information. You can navigate the Home view and stay in the Normal (sometimes referred to as mini) view by clicking on the icons at the bottom of the Portlet. Or, you can maximize the Portlet and obtain more detailed information in any area by clicking on the small arrow next to each icon. If you decide to maximize the Portlet, you can always return to the Home page by clicking on the Home icon.

**Note:** The content that is displayed in the Home page can be customized. For more information, see “Personalizing the Portlets” on page 7-1.

## Summary

By clicking on the small Home icon, you are brought to the Home page. The optional Summary page shows you Calendar, Task, and Mail information on one screen. The amount of Calendar days to display and the type and order of the Tasks to display can be customized. For more information, see “Personalizing the Portlets” on page 7-1.



**Today**
12:00 PM - 1:00 PM Lunch Meeting
5:00 PM - 6:00 PM Deveolpment Meeting

**Friday, June 18, 2004**
10:00 AM - 11:00 AM Group Meeting
5:00 PM - 6:00 PM Deveolpment Meeting

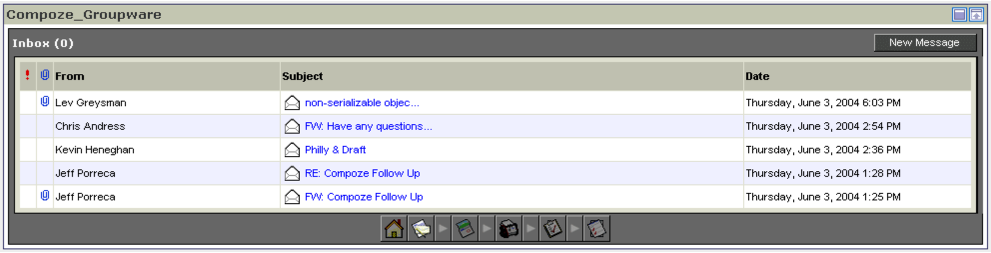
**Saturday, June 19, 2004**
5:00 PM - 6:00 PM Deveolpment Meeting

None Review Documentation
None Enter Data
None Complete Forms

Inbox (0)
Drafts (0)
Deleted Items (0)
Sent Items (0)

# Mail Summary

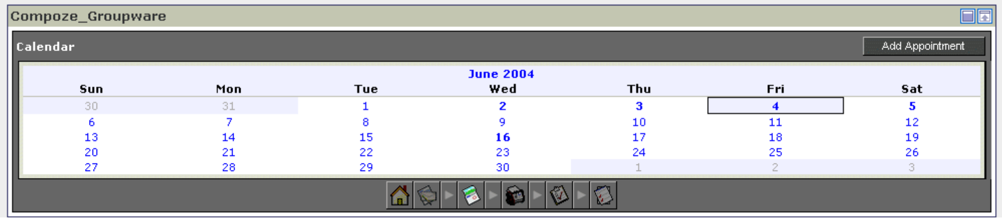
By clicking on the small Mail icon, you are brought to the Mail Summary page. This page shows the most recent messages from your Inbox. Different types of messages including email messages and meeting requests are visible. New unread email messages are highlighted. Click on a message subject to read the message, click the **Inbox** link to go to your inbox or click the **New Message** button to navigate to the New Message page.



| ! | 📎 | From | Subject | Date |
|---|---|---|---|---|
| | 📎 | Lev Greysman | non-serializable objec... | Thursday, June 3, 2004 6:03 PM |
| | | Chris Andress | FW: Have any questions... | Thursday, June 3, 2004 2:54 PM |
| | | Kevin Heneghan | Philly & Draft | Thursday, June 3, 2004 2:36 PM |
| | | Jeff Porreca | RE: Compoze Follow Up | Thursday, June 3, 2004 1:28 PM |
| | 📎 | Jeff Porreca | FW: Compoze Follow Up | Thursday, June 3, 2004 1:25 PM |

# Calendar Summary

By clicking on the small Calendar icon, you are brought to the Month page. Any day containing an appointment will be bold. Today's date will be highlighted for easy viewing. You can quickly navigate to the Day, Month, or Add Appointment pages from this view by clicking on the appropriate links.

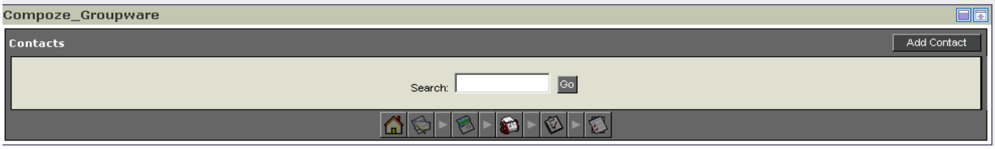


June 2004

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 30 | 31 | 1 | **2** | **3** | **4** | **5** |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | **16** | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

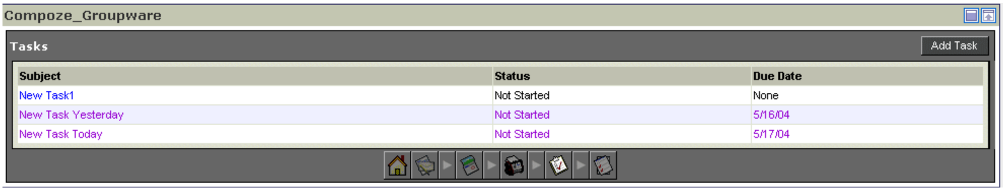
# Contacts Summary

By clicking on the small Contact Rolodex icon, you are brought to the Contacts Search page. From here you can search for contacts in your personal address book or navigate to the Add Contact page.



# Tasks Summary

By clicking on the small Task icon, you are brought to the Task Summary page. You can choose to show all tasks, only tasks that are not completed, only tasks that are complete, or only tasks that are overdue. The order of the Tasks can also be set to ascending or descending from any **of the visible fields. From here you can obtain more information about a task or click** Add Task to navigate to the Add Task page.



| Subject | Status | Due Date |
|---|---|---|
| New Task1 | Not Started | None |
| New Task Yesterday | Not Started | 5/16/04 |
| New Task Today | Not Started | 5/17/04 |

Home

CHAPTER 3

# Using the Mail Feature

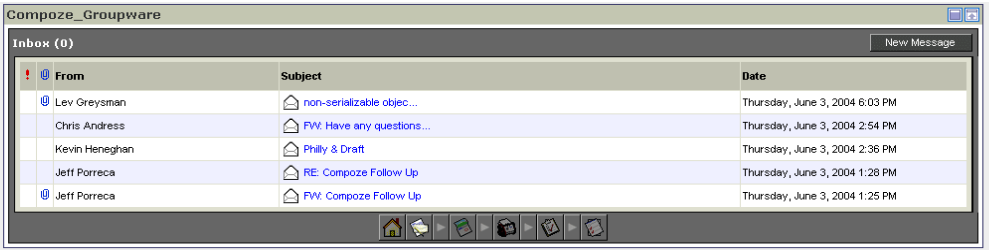
The mail portlet allows you to send, receive, and manage your email.

## Mail Summary View

In a single portlet instance, clicking on the small mail icon will bring up the mail summary view. This page lists the most recent messages in your mail inbox. The default setting is the five most recent. All types of messages are visible, including email messages, meeting requests and tasks assignment alerts. Unread messages are highlighted, in bold and display a closed envelope icon. Read messages are denoted with open envelope icons. Meeting invitations are denoted with a two person icon. From this window you can also see the message priority (high, normal or low), whether there are any attachments (paperclip icon), the message sender, subject and date the message was received.

You can also compose a new message by clicking **New Message**.

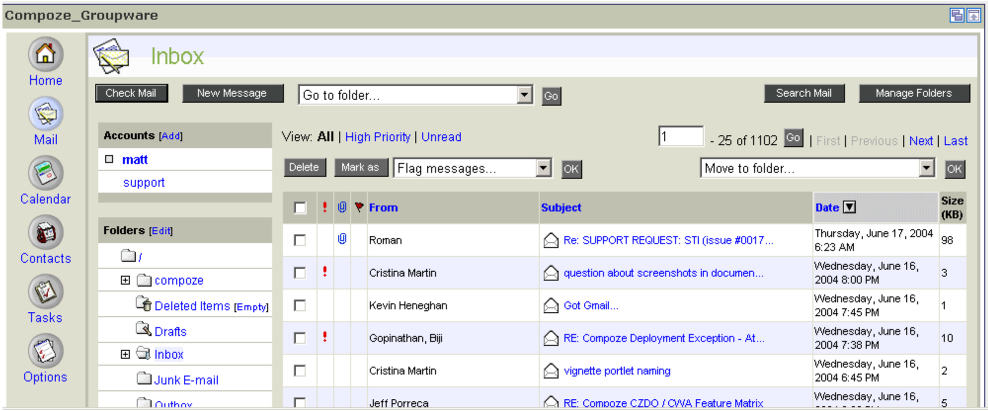
Clicking on any mail message or the arrow icon to the right of the mail icon will maximize the mail portlet. In this view you have access to all available mail features.



| ! | 📎 | From | Subject | Date |
|---|---|---|---|---|
| | 📎 | Lev Greysman | non-serializable objec... | Thursday, June 3, 2004 6:03 PM |
| | | Chris Andress | FW: Have any questions... | Thursday, June 3, 2004 2:54 PM |
| | | Kevin Heneghan | Philly & Draft | Thursday, June 3, 2004 2:36 PM |
| | | Jeff Porreca | RE: Compoze Follow Up | Thursday, June 3, 2004 1:28 PM |
| | 📎 | Jeff Porreca | FW: Compoze Follow Up | Thursday, June 3, 2004 1:25 PM |

# Mail Maximized View

In the mail maximized view, all new messages and messages that have not been filed in folders are displayed in your inbox. This view acts as the starting point for all your mail portlet features and navigation. You can move to another folder in your inbox by selecting it from the **Go to folder** drop-down menu at the top of the portlet.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Inbox
Check Mail
New Message
Go to folder...
Go
Search Mail
Manage Folders
Accounts [Add]
matt
support
Folders [Edit]
/
compoze
Deleted Items [Empty]
Drafts
Inbox
Junk E-mail
Outbox
View: All | High Priority | Unread
1 - 25 of 1102
Go
| First | Previous | Next | Last
Delete
Mark as
Flag messages...
OK
Move to folder...
OK

| ☐ | ! | 📎 | 🚩 | From | Subject | Date | Size (KB) |
|---|---|---|---|---|---|---|---|
| ☐ | | 📎 | | Roman | Re: SUPPORT REQUEST: STI (issue #0017... | Thursday, June 17, 2004 6:23 AM | 98 |
| ☐ | ! | | | Cristina Martin | question about screenshots in documen... | Wednesday, June 16, 2004 8:00 PM | 3 |
| ☐ | | | | Kevin Heneghan | Got Gmail... | Wednesday, June 16, 2004 7:45 PM | 1 |
| ☐ | ! | | | Gopinathan, Biji | RE: Compoze Deployment Exception - At... | Wednesday, June 16, 2004 7:38 PM | 10 |
| ☐ | | | | Cristina Martin | vignette portlet naming | Wednesday, June 16, 2004 6:45 PM | 2 |
| ☐ | | | | Jeff Porreca | RE: Compoze CZDO / CWA Feature Matrix | Wednesday, June 16, | 5 |

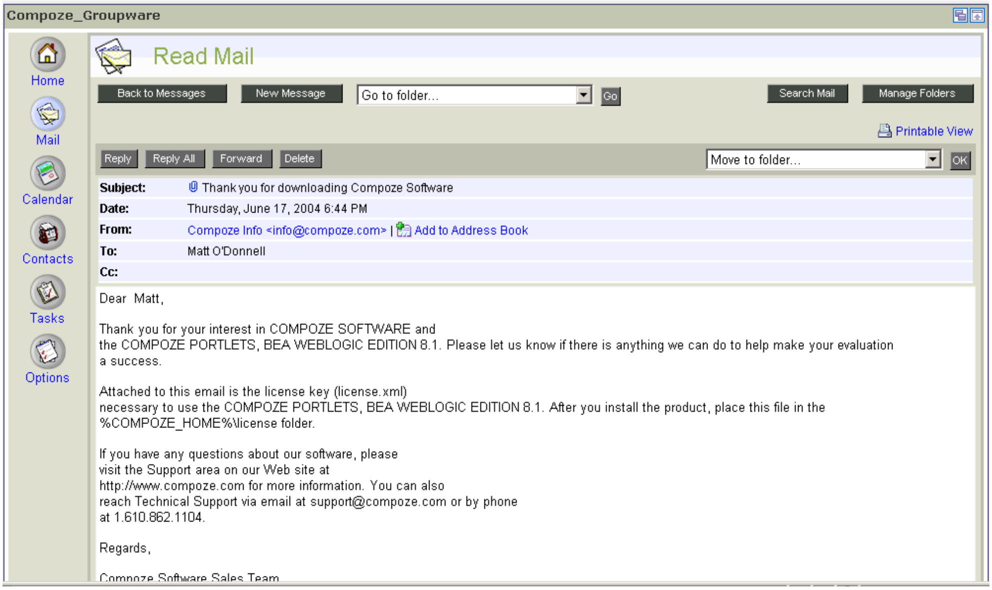
## Viewing and Reading Messages

By default, email messages in your inbox are sorted by the most recent date received. You can change sorting by clicking on the arrow icon next to the Date column to see the oldest email message first, by message sender by clicking on the From header, or by message subject by selecting the Subject header. Get new messages off the mail server by clicking **Check Mail**.

In addition to sorting, filter messages in your inbox by All, High Priority or Unread by clicking on the applicable header at the top of the portlet (Exchange Only). If you want to mark a message as read or unread, select it, and click **Mark as**. You can also flag messages for follow up by selecting the message, the desired follow up action and then clicking **OK**.

Also by default, 10 email messages are listed on a single page. Navigate to additional email messages, by clicking on the **First**, **Previous**, **Next**, or **Last** links to the far right of the portlet. The number of messages that appear on the first page, as well as other mail options, can be personalized. For more information, see "Personalizing the Portlets" on page 7-1.

Click on the message subject to read a message. This opens the Read Mail page. In the Read Mail page, you can reply to the message sender (or reply to all), forward, or delete the message by clicking on the appropriate button at the top of the page. File the message in a personal folder by selecting it from the **Move to folder** drop-down menu on click **OK**.



**Subject:** Thank you for downloading Compoze Software
**Date:** Thursday, June 17, 2004 6:44 PM
**From:** Compoze Info <info@compoze.com> | Add to Address Book
**To:** Matt O'Donnell
**Cc:**

Dear Matt,

Thank you for your interest in COMPOZE SOFTWARE and
the COMPOZE PORTLETS, BEA WEBLOGIC EDITION 8.1. Please let us know if there is anything we can do to help make your evaluation
a success.

Attached to this email is the license key (license.xml)
necessary to use the COMPOZE PORTLETS, BEA WEBLOGIC EDITION 8.1. After you install the product, place this file in the
%COMPOZE_HOME%\license folder.

If you have any questions about our software, please
visit the Support area on our Web site at
http://www.compoze.com for more information. You can also
reach Technical Support via email at support@compoze.com or by phone
at 1.610.862.1104.

Regards,

Compoze Software Sales Team

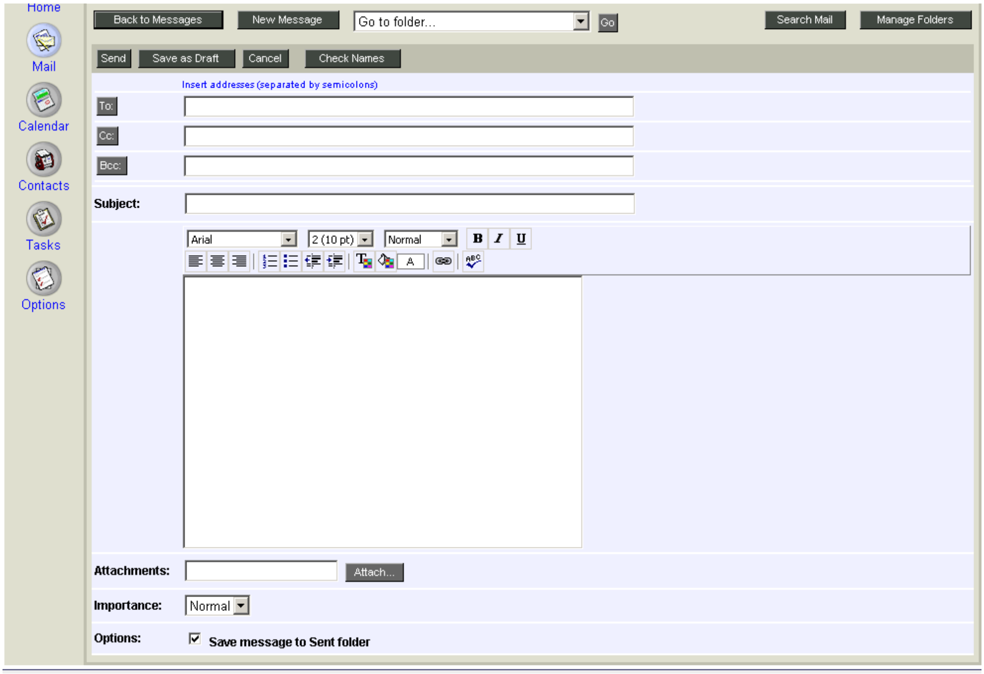
If the message has a file attached, click on the link to the attachment and either open it or save it to your local hard drive.

If the message is a meeting request, you will be able to accept, tentatively accept, decline or delete the request by clicking on the appropriate button. A meeting request is sent to you when a person invites you to a calendar appointment. When you accept a meeting request, the appointment is automatically added to your calendar and is viewable in the calendar portlet. If you created the meeting request, you will receive a meeting response in your inbox from each recipient. You are able to reply or delete meeting response messages.

Other features on the Read Mail page include the ability to add the message sender's name and email address to your personal address book and a printable view link. Once you have replied to or forwarded a mail message you will be returned to the main inbox view. You can also get back to this view by clicking **Back to Messages**.

## Composing Messages

To send a new mail message, click **New Message**. This button is found on most pages in the Mail portlet.


Home
Mail
Calendar
Contacts
Tasks
Options
Back to Messages
New Message
Go to folder...
Go
Search Mail
Manage Folders
Send
Save as Draft
Cancel
Check Names
Insert addresses (separated by semicolons)
To:
Cc:
Bcc:
Subject:
Arial
2 (10 pt)
Normal
B
I
U
A
Attachments:
Attach...

Importance: Normal

Options: ☑ Save message to Sent folder

In the **To** or **Cc** fields, type the names of the recipients. Separate multiple email addresses with semicolons (;). You may also add an address by clicking **To** or **Cc**. This will open the Address Book dialog box, which allows you to select or search through your company's address list. You can also choose your personal address book from the drop-down menu at the top of the dialog.

Once you have found the intended recipient, select the name and click **To** >> or **Cc** >> then click **OK**. This will add the person's email address to your message.

To blind carbon copy recipients, type their email addresses in the **Bcc:** field or click **Bcc:** to open the Address Book dialog. Bcc recipients receive a copy of the message, but their names do not appear in the list of recipients nor can they see the names of other blind copy recipients.

Another way to add email address is to type in the first letter or name of the intended recipient and click **Check Names**. This will check the company address book for matches and list possible entries (MS Exchange only).

In the subject field, type a brief subject line.

Type your message in the message body. Format the message by selecting one of the format options in the tool bar above the body. Formatting options include:

- Font Face - Arial, Times New Roman, etc.
- Font Size - 8 pt., 10 pt., 12 pt., etc.
- Font Style - Bold, italics, underline
- Font Color
- Paragraph Style - Normal, Heading 1, etc.
- Paragraph Justification - Left, Center, Right
- Bullets and Numbering
- Background Color

Before sending your message, click the spell check icon in the toolbar above the message body. The spell checker will offer suggestions to replace the unknown or misspelled word.

Add any attachments by clicking **Attachments**. Browse to and select the intended file on your computer and hit **Attach**. Once the file is successfully attached, it will appear on the right side of the Attachments dialog box. Remove the attachment by clicking the trash can icon.

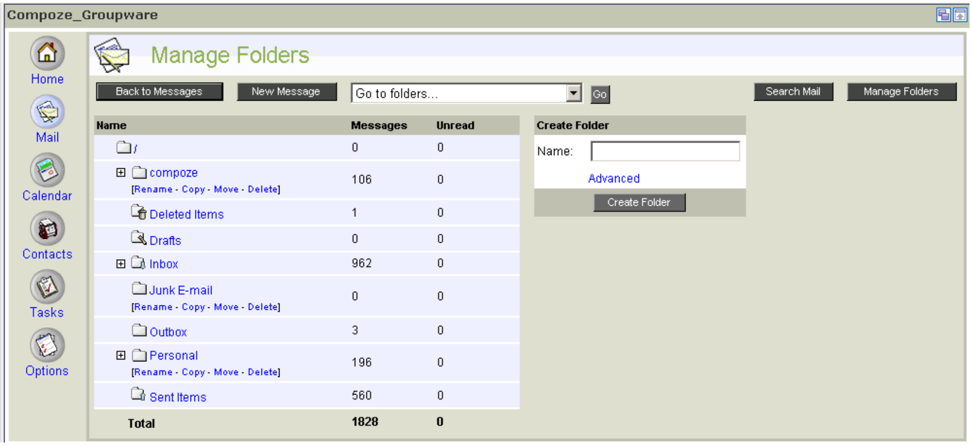
If desired, set the importance level to high, normal, or low.

Check of any of the desired mail options, from saving the message in your sent folder, to receiving notifications when the message has been delivered and/or read.

Click **Send** to send the message or **Save as Draft** to save the message to be sent at a later time.

## Managing Messages and Folders

Manage large amounts of email messages by filing them personal folders. Your personal folder tree appears on the left side of the Inbox page. You can create, rename, copy, move, and delete folders from the Manage Folders page by clicking on the appropriate link under the folder name. Navigate to this page by clicking **Manage Folders** or the Edit link at the top of the folder navigation tree.

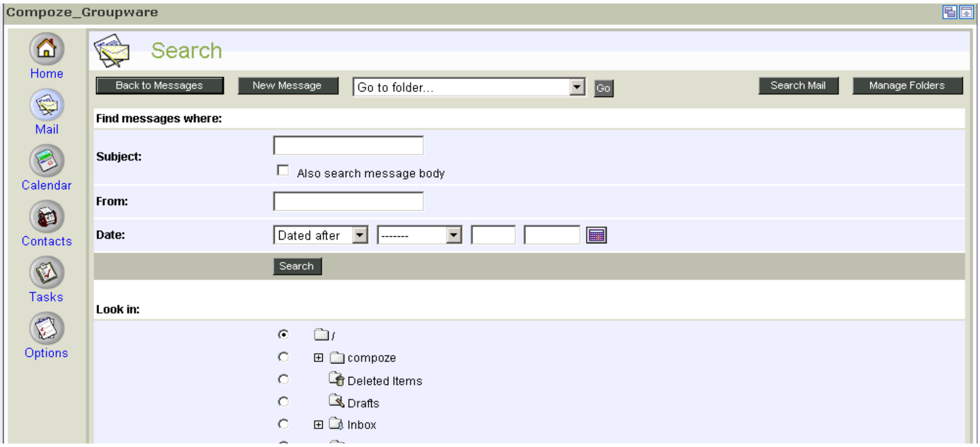

Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Manage Folders
Back to Messages
New Message
Go to folders...
Go
Search Mail
Manage Folders
Create Folder
Name:
Advanced
Create Folder

| Name | Messages | Unread |
|---|---|---|
| / | 0 | 0 |
| ⊞ compoze<br>[Rename - Copy - Move - Delete] | 106 | 0 |
| Deleted Items | 1 | 0 |
| Drafts | 0 | 0 |
| ⊞ Inbox | 962 | 0 |
| Junk E-mail<br>[Rename - Copy - Move - Delete] | 0 | 0 |
| Outbox | 3 | 0 |
| ⊞ Personal<br>[Rename - Copy - Move - Delete] | 196 | 0 |
| Sent Items | 560 | 0 |
| **Total** | **1828** | **0** |

Type a new folder name in the input box under Create Folder. File this folder under an existing one by clicking on the Advanced link. Complete the process by clicking **Create Folder**.

# Searching Messages

You can search mail by the Subject, From, and Date fields. Type in a keyword found in the message subject, a name or email address in the From field or select a date range.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Search
Back to Messages
New Message
Go to folder...
Go
Search Mail
Manage Folders
Search

**Find messages where:**

**Subject:**
☐ Also search message body

**From:**

**Date:** Dated after -------

**Look in:**
● /
○ ⊞ compoze
○ Deleted Items
○ Drafts
○ ⊞ Inbox

Searches can be limited to a specific folder or sub-folder by selecting it under **Look in**.

**Note:** Searching sub-folders and the message body is only supported with MS Exchange only.

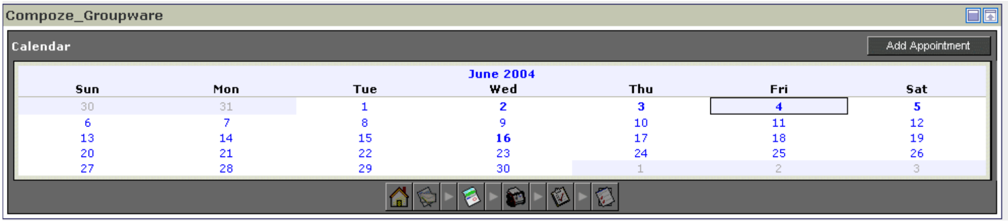
CHAPTER 4

# Using the Calendar Feature

The calendar portlet allows you to create and schedule meetings and appointments.

## Calendar Summary View

In a single portlet instance, clicking on the small calendar icon will bring up the calendar summary view. This view shows the current month. Any day containing an appointment will appear in bold. Today's date is highlighted for easy viewing. From this view you can quickly add a new appointment by clicking **Add appointment**. Clicking on any date inside the portlet will maximize it and take you to the appropriate day or month.



June 2004

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 30 | 31 | 1 | **2** | **3** | **4** | **5** |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | **16** | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

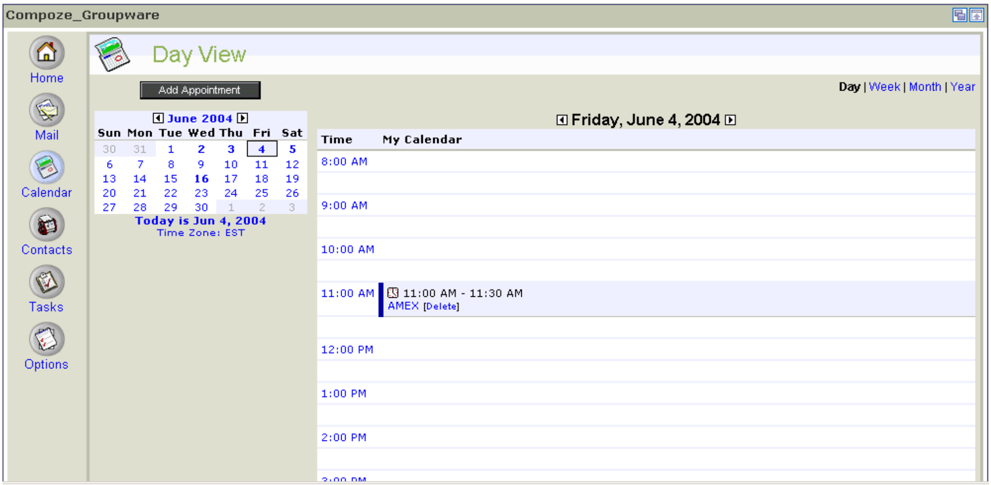
## Calendar Maximized View

### Day View

The day view lists all of your appointments for a given day. Pertinent details about these events include the type (meeting, indicated by a clock icon, or appointment, indicated by a two person icon), subject, time, location, importance, attachments and recurrence. All day appointments are shown at the top of the calendar page and indicated with a yellow bullet point to clearly distinguish them from timed appointments.

**Note:** Lotus Domino supports different types of appointments (such as reminders and anniversaries).

Scroll through days in the month by clicking on the arrows to the left or right of the current date at the top of the calendar or the Previous Day or Next Day links at the bottom of the calendar.

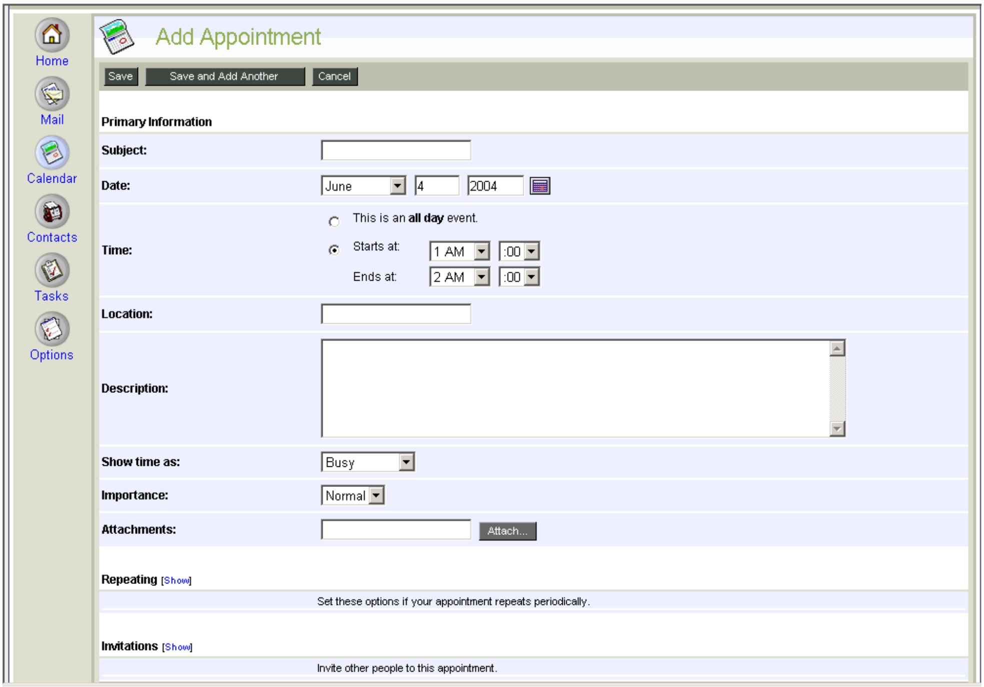

Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Day View
Add Appointment
Day | Week | Month | Year
June 2004
Today is Jun 4, 2004
Time Zone: EST
Friday, June 4, 2004
Time
My Calendar
8:00 AM
9:00 AM
10:00 AM
11:00 AM
12:00 PM
1:00 PM
2:00 PM
3:00 PM

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

11:00 AM - 11:30 AM
AMEX [Delete]

# Adding an Appointment

To create a new appointment, click on a time inside the calendar or click **Add Appointment**. Type in or select the appropriate information for the appointment including date, time and location. You can also show the time in your calendar as busy, as indicated by a dark blue bar, out of office, indicated by a purple bar, and tentative, indicated by a light blue bar.



Add Appointment

Primary Information

| | |
|---|---|
| Subject: | |
| Date: | June 4 2004 |
| Time: | ○ This is an **all day** event.<br>● Starts at: 1 AM :00<br>Ends at: 2 AM :00 |
| Location: | |
| Description: | |
| Show time as: | Busy |
| Importance: | Normal |
| Attachments: | |

Repeating [Show]

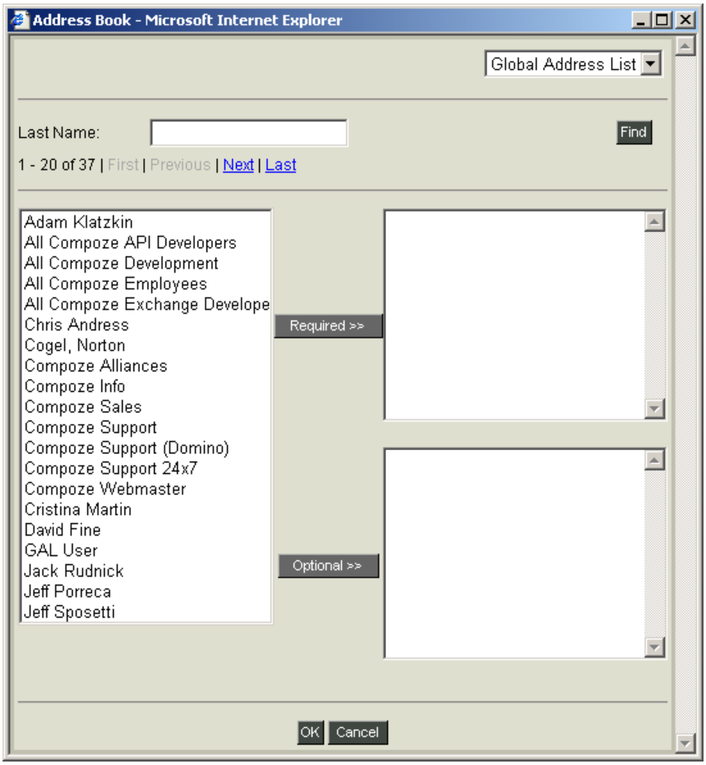
Set these options if your appointment repeats periodically.

Invitations [Show]

Invite other people to this appointment.

If your appointment repeats periodically, click **Show** under the Repeating menu and choose from various recurrence options and intervals.

By inviting others to an appointment, it becomes a meeting, and recipients will receive a meeting request in their inbox. Click on the **Show** link under Invitations to show the meeting menu. Invite people to the meeting by typing in their email addresses or by clicking on **Required** or **Optional** buttons to access the company address book. Select the appropriate person to invite, then **Required** >> if they are a required attendee or **Optional** >> if their attendance to the meeting is optional. Click **OK** and their email addresses will automatically be entered in the appropriate input boxes.



Global Address List

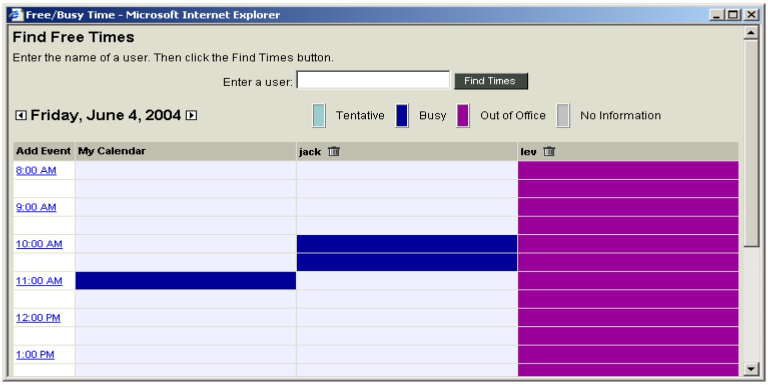
Last Name:

1 - 20 of 37 | First | Previous | Next | Last

Adam Klatzkin
All Compoze API Developers
All Compoze Development
All Compoze Employees
All Compoze Exchange Develope
Chris Andress
Cogel, Norton
Compoze Alliances
Compoze Info
Compoze Sales
Compoze Support
Compoze Support (Domino)
Compoze Support 24x7
Compoze Webmaster
Cristina Martin
David Fine
GAL User
Jack Rudnick
Jeff Porreca
Jeff Sposetti

## Free/Busy Query

You can also find out if meeting recipients are available before sending the meeting request by performing a free/busy query. This is done by clicking **Find Free Times** and then entering the email address of the recipients whose calendars you want to check. Click **Find Times** and the calendars of the invited individuals will appear next to yours. A color key will indicate where they are free or busy on the selected date. Click on the time where all your meeting recipients are free. This will automatically set the meeting time.



Free/Busy Time - Microsoft Internet Explorer

Find Free Times

Enter the name of a user. Then click the Find Times button.

Enter a user:

Find Times

Friday, June 4, 2004

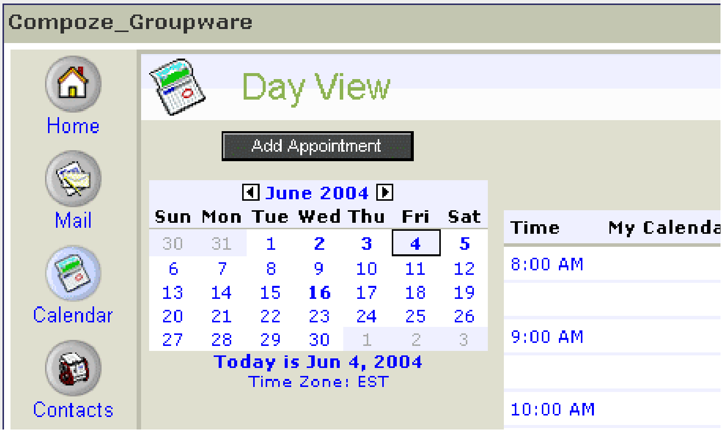
Tentative
Busy
Out of Office
No Information

| Add Event | My Calendar | jack | lev |
|---|---|---|---|
| 8:00 AM | | | |
| 9:00 AM | | | |
| 10:00 AM | | | |
| 11:00 AM | | | |
| 12:00 PM | | | |
| 1:00 PM | | | |

To send the meeting request or save the appointment, click **Save**. You will then return to the Day View. If you want to immediate create another appointment, click **Save and Add Another** and you will be taken back to the Add Appointment page.

## Mini-Month View

The day view also includes a mini-month calendar to aid in navigation. Days that have appointments are shown in bold. From this calendar you can quickly navigate to any day in a given month, and scroll through months by clicking on the arrows on either side of the current month.



Compoze_Groupware
Home
Mail
Calendar
Contacts
Day View
Add Appointment

June 2004

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 30 | 31 | 1 | **2** | **3** | **4** | **5** |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | **16** | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

**Today is Jun 4, 2004**

Time Zone: EST

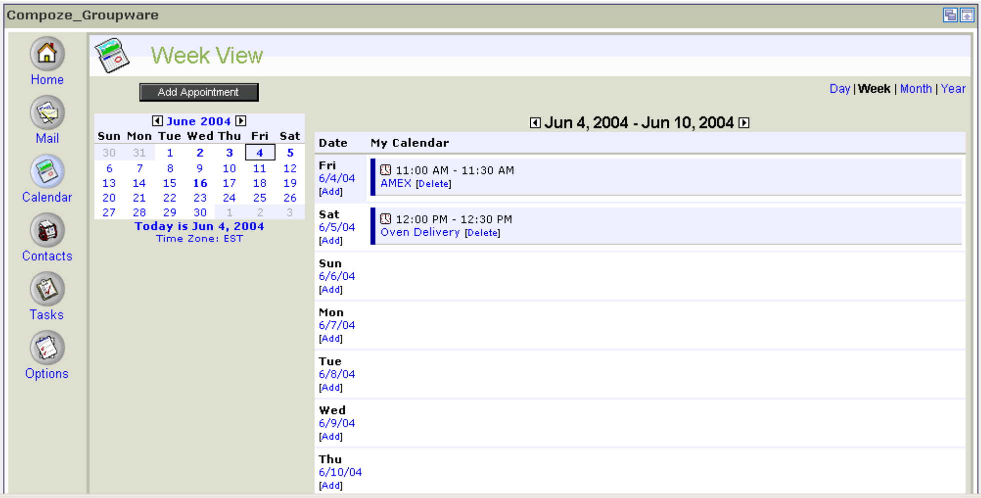
| Time | My Calenda |
|---|---|
| 8:00 AM | |
| | |
| 9:00 AM | |
| | |
| 10:00 AM | |

# Additional Views

You can get weekly, monthly or annual views of your calendar by clicking on the appropriate link at the top right of each calendar view. From each view you can add, edit or delete appointments. The mini-calendar in the month view allows you to scroll by month while the mini-calendar in the year view allows you to scroll by year. You can always get back to the current day by clicking on today's date at the bottom of each mini-calendar. In addition, the current date is highlighted in each view.

## Weekly

This is an example of a weekly view.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Week View
Add Appointment
Day | Week | Month | Year

June 2004

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

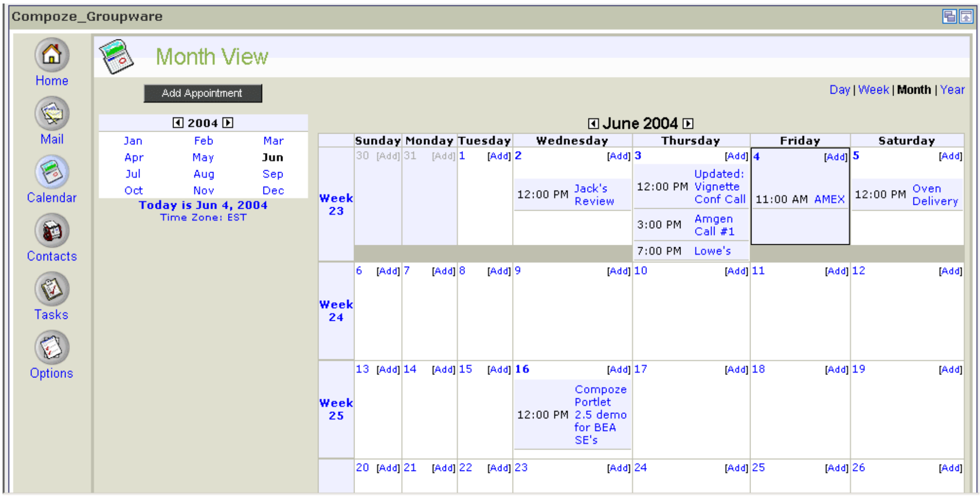
Today is Jun 4, 2004
Time Zone: EST

Jun 4, 2004 - Jun 10, 2004

| Date | My Calendar |
|---|---|
| Fri<br>6/4/04<br>[Add] | 11:00 AM - 11:30 AM<br>AMEX [Delete] |
| Sat<br>6/5/04<br>[Add] | 12:00 PM - 12:30 PM<br>Oven Delivery [Delete] |
| Sun<br>6/6/04<br>[Add] | |
| Mon<br>6/7/04<br>[Add] | |
| Tue<br>6/8/04<br>[Add] | |
| Wed<br>6/9/04<br>[Add] | |
| Thu<br>6/10/04<br>[Add] | |

## Monthly

This is an example of a monthly view.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Add Appointment
Day | Week | Month | Year

Month View

2004

| | | |
|---|---|---|
| Jan | Feb | Mar |
| Apr | May | **Jun** |
| Jul | Aug | Sep |
| Oct | Nov | Dec |

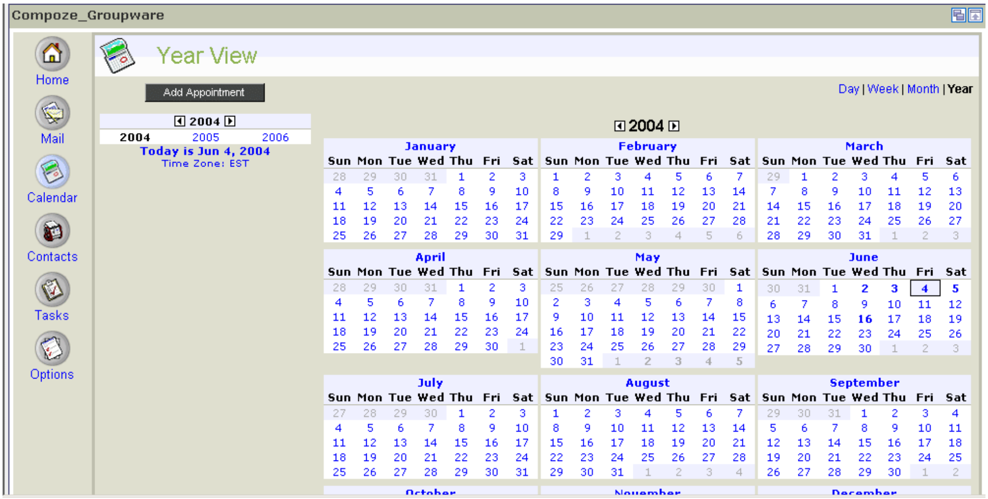
**Today is Jun 4, 2004**
Time Zone: EST

June 2004

| | Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|---|
| **Week 23** | 30 [Add] | 31 [Add] | 1 [Add] | **2** [Add]<br>12:00 PM Jack's Review | 3 [Add]<br>12:00 PM Updated: Vignette Conf Call<br>3:00 PM Amgen Call #1<br>7:00 PM Lowe's | **4** [Add]<br>11:00 AM AMEX | 5 [Add]<br>12:00 PM Oven Delivery |
| **Week 24** | 6 [Add] | 7 [Add] | 8 [Add] | 9 [Add] | 10 [Add] | 11 [Add] | 12 [Add] |
| **Week 25** | 13 [Add] | 14 [Add] | 15 [Add] | **16** [Add]<br>12:00 PM Compoze Portlet 2.5 demo for BEA SE's | 17 [Add] | 18 [Add] | 19 [Add] |
| | 20 [Add] | 21 [Add] | 22 [Add] | 23 [Add] | 24 [Add] | 25 [Add] | 26 [Add] |

## Annual

This is an example of the annual view.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Add Appointment
Day | Week | Month | Year

Year View

2004

| | | |
|---|---|---|
| **2004** | 2005 | 2006 |

**Today is Jun 4, 2004**
Time Zone: EST

2004

**January**

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

**February**

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 1 | 2 | 3 | 4 | 5 | 6 |

**March**

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 29 | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |

**April**

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 1 |

**May**

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 25 | 26 | 27 | 28 | 29 | 30 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |

**June**

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 30 | 31 | 1 | **2** | **3** | **4** | **5** |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | **16** | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

**July**

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

**August**

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |

**September**

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 1 | 2 |

**October** **November** **December**

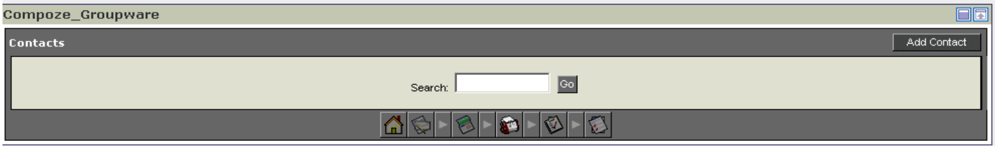
CHAPTER 5

# Using the Contacts Feature

The Contacts stores names, addresses, phone numbers, email addresses, and notes about personal contacts.

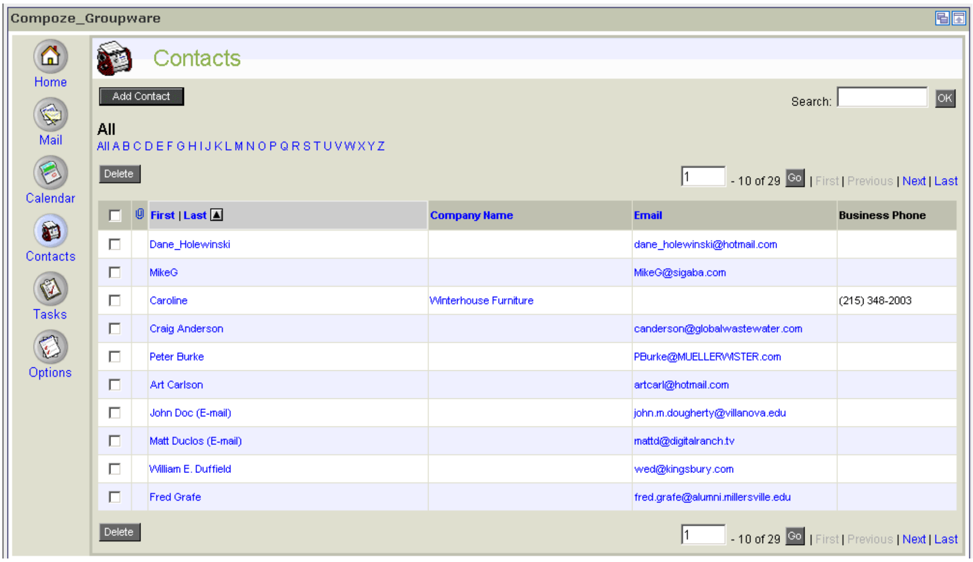
## Contacts Summary View

The contacts portlet allows you to manage names, addresses, phone numbers, email addresses, and other information in a personal address book. In the single portlet instance, clicking on the small Rolodex icon will bring up the contacts summary view. This page allows you to add new contacts and keyword search for contacts in your address book by first name.



## Contacts Maximized View

To maximize the portlet and access all of the available features, click on the arrow icon to the right of the Rolodex icon. This will open the main Contacts page. From this view you can see summary information about each contact including first and last names, company name, email address and phone number. To view detailed information about a contact, click on the name or company name.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Contacts
Add Contact
Search:
OK
All
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Delete
1 - 10 of 29
Go
| First | Previous | Next | Last

| ☐ | | First \| Last ▲ | Company Name | Email | Business Phone |
|---|---|---|---|---|---|
| ☐ | | Dane_Holewinski | | dane_holewinski@hotmail.com | |
| ☐ | | MikeG | | MikeG@sigaba.com | |
| ☐ | | Caroline | Winterhouse Furniture | | (215) 348-2003 |
| ☐ | | Craig Anderson | | canderson@globalwastewater.com | |
| ☐ | | Peter Burke | | PBurke@MUELLERWISTER.com | |
| ☐ | | Art Carlson | | artcarl@hotmail.com | |
| ☐ | | John Doc (E-mail) | | john.m.dougherty@villanova.edu | |
| ☐ | | Matt Duclos (E-mail) | | mattd@digitalranch.tv | |
| ☐ | | William E. Duffield | | wed@kingsbury.com | |
| ☐ | | Fred Grafe | | fred.grafe@alumni.millersville.edu | |

Delete
1 - 10 of 29
Go
| First | Previous | Next | Last

By default, the Contacts page shows all contacts in descending order by last name. You can reverse the order by clicking on the arrow next to the Last link. You can also sort contacts by company name or email address by clicking on the appropriate header.

You can also filter contacts by the first letter of the last name by clicking on the appropriate letter of the alphabet.

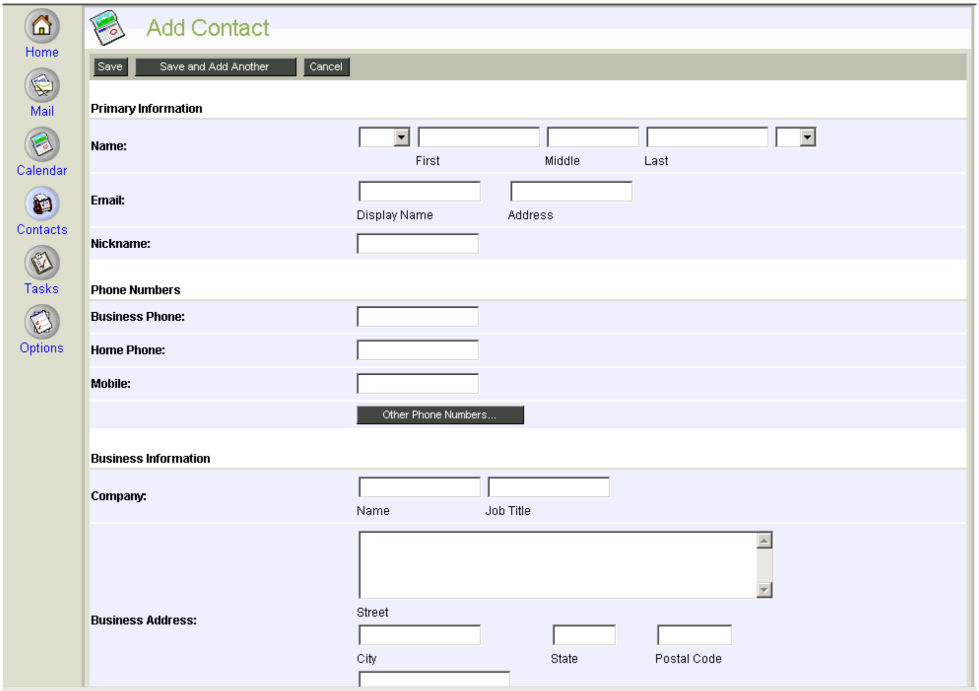
# Finding Contacts

A limited number of contacts are displayed on each page. You can modify the number of contacts to be shown per page in the Options Portlet. For more information, see "Personalizing the Portlets" on page 7-1. To scroll through pages of contacts, click on the **First**, **Previous**, **Next**, or **Last** links. The total number of contacts in your address book is noted to the left of these links. To jump to a specific contact, type the number in the input box and click **Go**. For example, if you have 60 contacts in your address book, and type in the number 35, then you will jump to the thirty-fifth (35th) contact in the list.

You can also search for contacts by first name by typing it in the search input bar and click **OK**. All of the contacts that match your search term will appear.

# Adding, Editing, and Deleting Contacts

Add a new contact to your address book by clicking **Add Contact**. On this page you can enter detailed information about a person including name, home and business addresses, multiple phone numbers, and email addresses and even personal information such as spouse's name, anniversary, important dates, or other comments. You can also attach files to a contact, such as a photograph or logo.


Home
Mail
Calendar
Contacts
Tasks
Options
Add Contact
Save
Save and Add Another
Cancel
Primary Information
Name:
First
Middle
Last
Email:
Display Name
Address
Nickname:
Phone Numbers
Business Phone:
Home Phone:
Mobile:
Other Phone Numbers...
Business Information
Company:
Name
Job Title
Business Address:
Street
City
State
Postal Code

Once you are finished entering in all the pertinent information, click **Save**. This will return you to the mail Contacts page. To immediately add another contact, click **Save and Add Another**. This will return you to the Add Contact page.

To edit the information about a contact, select it and hit the **Edit** link next to the person's name. This will open the Edit Contact page where you can change or delete any information contained in any field. Click **Save** when you are finished to save your changes.

To delete contacts from your address book, check them off in the boxes to the left of each contact and click **Delete**.

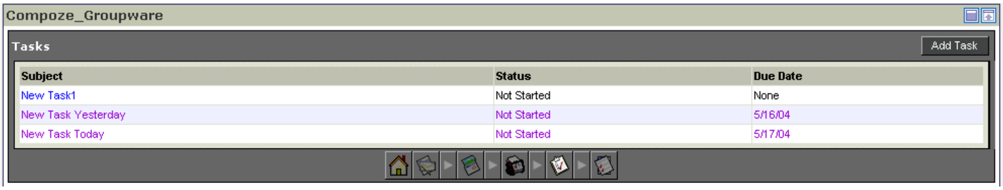
CHAPTER 6

# Using the Tasks Feature

The tasks feature allows you to track and prioritize your personal tasks.

## Task Summary View

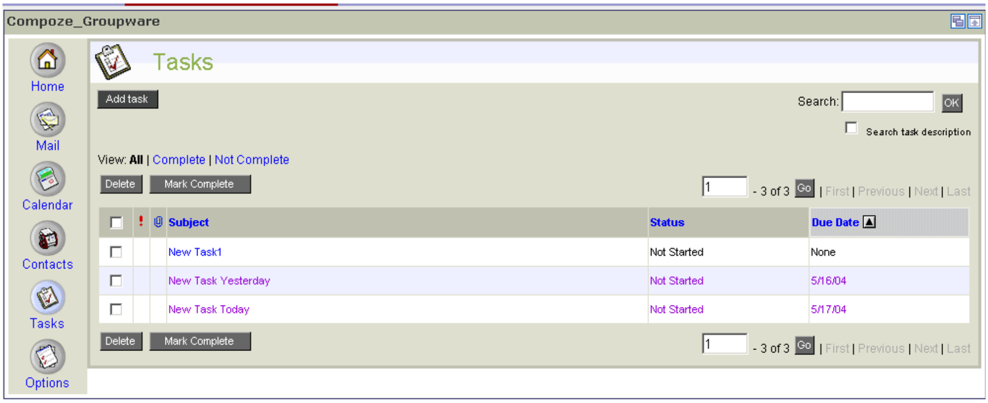
The task portlet allows you to track tasks on a to-do list. In the single portlet instance, clicking on the small clipboard icon will bring up the task summary view. This page allows you to view recent tasks and quickly add new tasks.



| Subject | Status | Due Date |
|---|---|---|
| New Task1 | Not Started | None |
| New Task Yesterday | Not Started | 5/16/04 |
| New Task Today | Not Started | 5/17/04 |

## Task Maximized View

To maximize the portlet and access all of the available features, click on the arrow icon to the right of the clipboard icon. This will open the main Task page. You can also maximize the portlet by clicking on the subject of a specific task which you take you to that task's detail page.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Tasks
Add task
Search:
OK
☐ Search task description
View: All | Complete | Not Complete
Delete
Mark Complete
1 - 3 of 3 Go | First | Previous | Next | Last

| ☐ | ! | 📎 | Subject | Status | Due Date ▲ |
|---|---|---|---|---|---|
| ☐ | | | New Task1 | Not Started | None |
| ☐ | | | New Task Yesterday | Not Started | 5/16/04 |
| ☐ | | | New Task Today | Not Started | 5/17/04 |

From the main tasks page you can see summary information about a list of tasks including priority, attachments, subject, status, and due date. Tasks can be sorted by each of these fields, except file attachments. To view detailed information about a task, click on the subject to go to the Task Detail page. On this page you can see additional information such as percentage complete, description, total work, and actual work.

If the task is completed, click **Mark Complete**. This will cross the item off your to-do list. To edit information about the task, such as percentage complete, click **Edit**. If you are finished viewing the task, click **Done** or delete the task by clicking **Delete**. You also have the option printing the detailed information about a task by clicking **Printable View**. This will bring up a view of the task suitable for printing. Print the task by clicking **Print**. Close the dialog box when you are finished by clicking **Close**.

# Finding Tasks

A limited number of tasks are displayed on each page. You can modify the number of tasks to be shown per page in the Options Portlet. For more information, see "Personalizing the Portlets" on page 7-1.

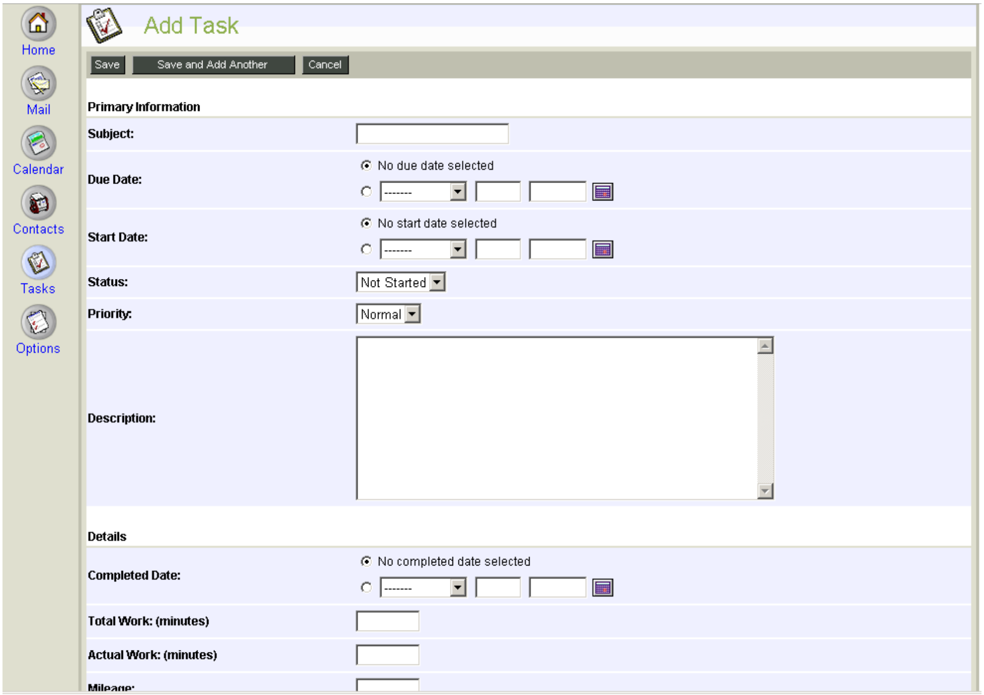
To scroll through pages of tasks, click on the **First**, **Previous**, **Next** or **Last** links. The total number of tasks on our to-do list is noted to the left of these links. To jump to a specific task, type the number in the input box and click **Go**. For example, if you have 30 tasks on your to-do list, and type in the number 25, then you will jump to the twenty-fifth (25th) task on the list.

In addition to sorting, tasks can be further managed by filtering them by viewing all tasks, or only tasks that are complete or incomplete by clicking on the appropriate link at the top of the main

Tasks page. You can also search for tasks by first subject and/or description by typing it in the search input bar and click **OK**. All of the tasks that match your search parameters will appear.

## Adding, Editing, or Deleting Tasks

Add a new task by clicking **Add Task**. This will open the Add Task page where you can enter detailed information about a task including a subject, due date, start date, priority, and other pertinent details which can be selected from the appropriate drop down menus or input boxes. High priority tasks are denoted with a red exclamation point, while low priority tasks are indicated by a blue downward arrow.



Primary Information

Subject:

Due Date: ● No due date selected ○ -------

Start Date: ● No start date selected ○ -------

Status: Not Started

Priority: Normal

Description:

Details

Completed Date: ● No completed date selected ○ -------

Total Work: (minutes)

Actual Work: (minutes)

Mileage:

When you are finished entering in the data, click **Save** and return to the main Tasks page. To immediately add another task, click **Save and Add Another**. This will return you to the Add Task page.

To edit the information about a task, select it and click **Edit** next to the task subject. This will open the Edit Task page where you can change or delete any information contained in any field. Click **Save** when you are finished to save your changes.

To delete tasks from your to-do list, check them off in the boxes to the left of each task and click **Delete**.

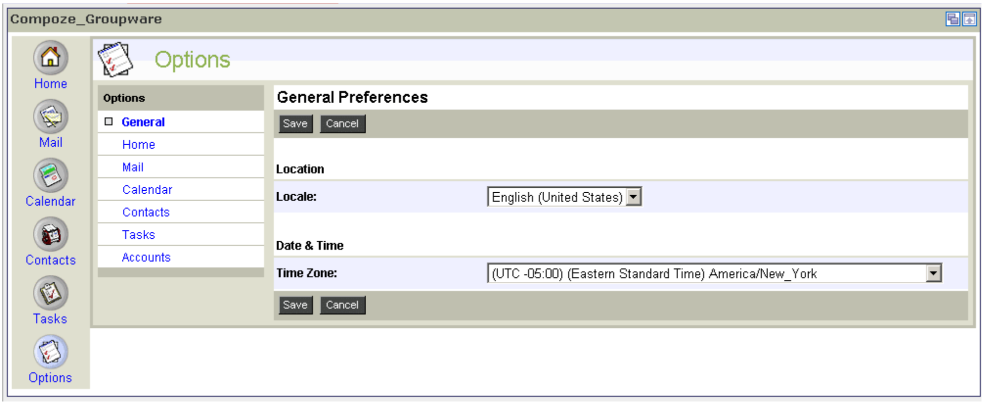
# Personalizing the Portlets

WebLogic Portlets for Groupware Integration supports many personalization features and allow you to customize your experience. These features can be found in the Options Portlet, denoted by the check list icon on the Home portlet. There is no summary view of the Options portlet, clicking on the icon will open the General Options page.

## General Preferences

In the General Preferences menu you can choose among the following locales:

- English (United States)
- French (France)
- German (Germany)
- Japanese (Japan)


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Options
Options
General
Home
Mail
Calendar
Contacts
Tasks
Accounts
General Preferences
Save
Cancel
Location
Date & Time
Save
Cancel

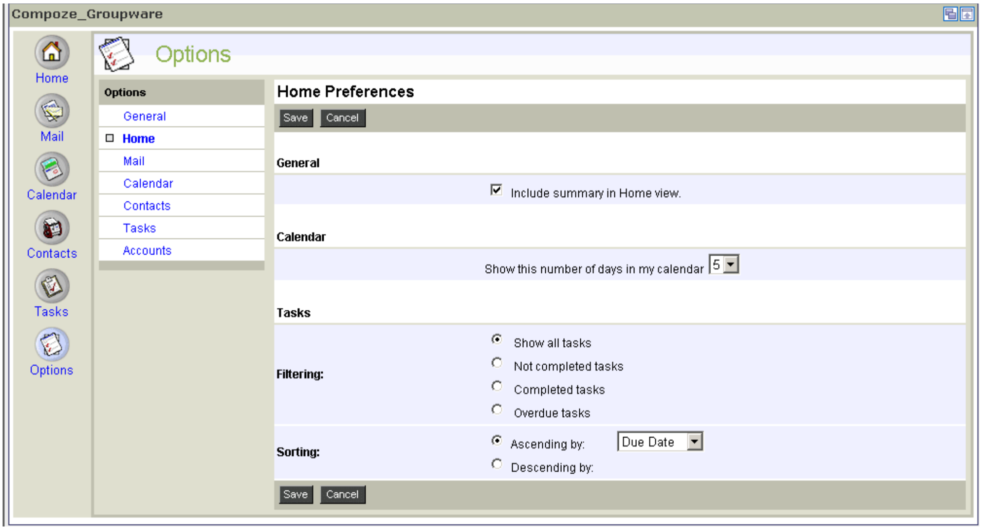
Locale: English (United States)

Time Zone: (UTC -05:00) (Eastern Standard Time) America/New_York

By selecting one of these languages from the drop-down menu, the portlets will be translated into that locale including the language and the appearance of dates. You can also select the appropriate time zone from the drop down menu. A change in either of these settings will affect all the portlets. Save your changes by clicking **Save**.

# Home Preferences

In the Home Preferences menu you can modify how you view the data in each summary view for Calendar, Tasks, and Mail. You can also choose to view an overall summary view or not. By deselecting the summary view option, you will see the mail summary view instead of the general summary when clicking on the Home icon.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Options
Options
General
Home
Mail
Calendar
Contacts
Tasks
Accounts
Save
Cancel
Save
Cancel

Home Preferences

General

☑ Include summary in Home view.

Calendar

Show this number of days in my calendar 5

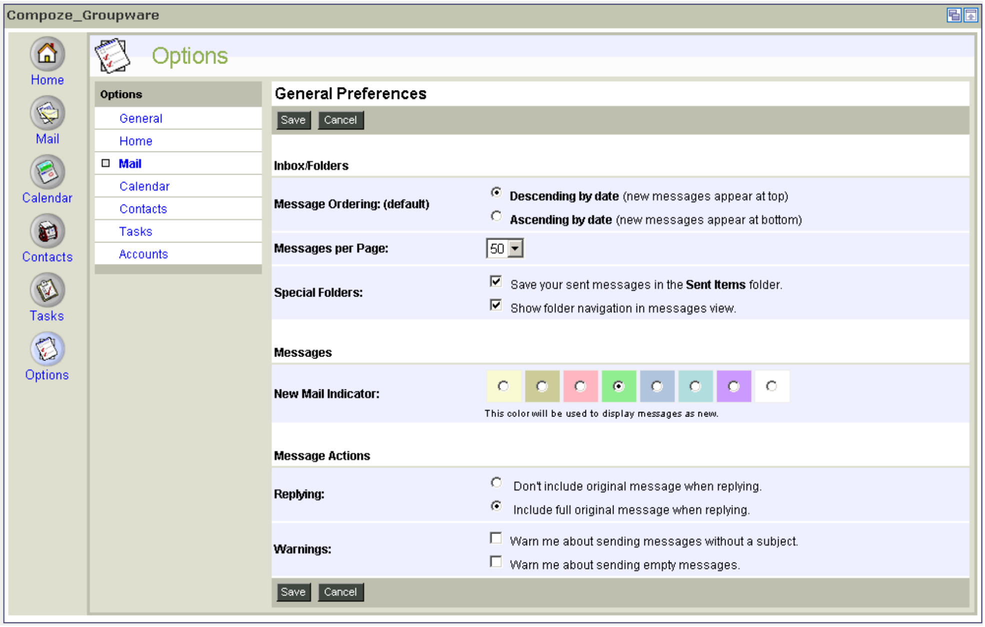
Tasks

Filtering:
● Show all tasks
○ Not completed tasks
○ Completed tasks
○ Overdue tasks

Sorting:
● Ascending by: Due Date
○ Descending by:

## Mail Preferences

In the Mail Preferences menu you can modify how you will view the information in the maximized mail portlet. Various mail options can be configured to affect the mail view such as the order in which messages appear, how many messages should appear per page, and even the color of the new mail indicator. Check off or select the desired options and click **Save** to save your changes.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Options
Options
General
Home
Mail
Calendar
Contacts
Tasks
Accounts
Save
Cancel

General Preferences

Inbox/Folders

Message Ordering: (default)
● **Descending by date** (new messages appear at top)
○ **Ascending by date** (new messages appear at bottom)

Messages per Page: 50

Special Folders:
☑ Save your sent messages in the **Sent Items** folder.
☑ Show folder navigation in messages view.

Messages

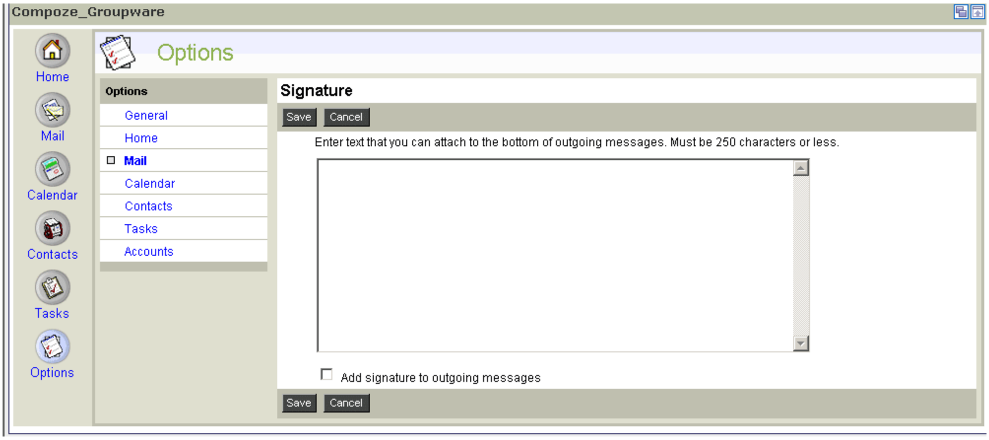
New Mail Indicator: ○ ○ ○ ● ○ ○ ○ ○
This color will be used to display messages as new.

Message Actions

Replying:
○ Don't include original message when replying.
● Include full original message when replying.

Warnings:
☐ Warn me about sending messages without a subject.
☐ Warn me about sending empty messages.

You also have the option of adding a custom signature to all your outgoing messages. To create a mail signature, click the Signature link under Mail Options. Enter the text that will be added to the bottom of all your outgoing messages. Check the box for **Add signature to outgoing messages** and click **Save**.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Options
Options
General
Home
Mail
Calendar
Contacts
Tasks
Accounts
Save
Cancel

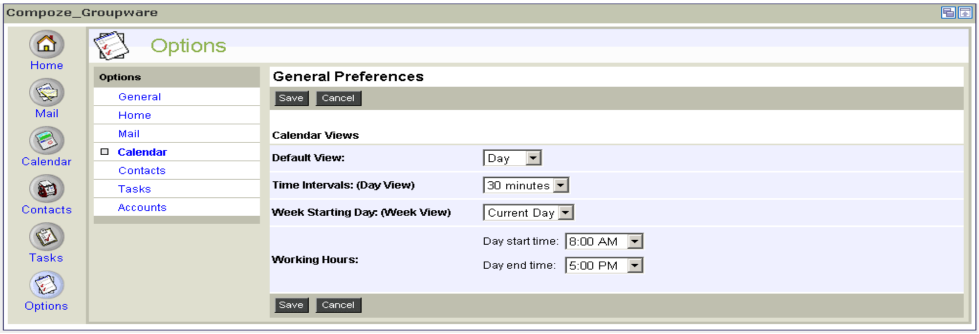
Signature

Enter text that you can attach to the bottom of outgoing messages. Must be 250 characters or less.

☐ Add signature to outgoing messages

# Calendar Preferences

In the Calendar Preferences menu you can configure the default view of the maximized calendar portlet from day to week, month or year. You can also determine the time intervals on your day view from 15 minutes to 1 hour and the start day in your week view from the current day to any other day of the week.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Options
Options
General
Home
Mail
Calendar
Contacts
Tasks
Accounts
Save
Cancel
Save
Cancel

General Preferences

Calendar Views

Default View: Day

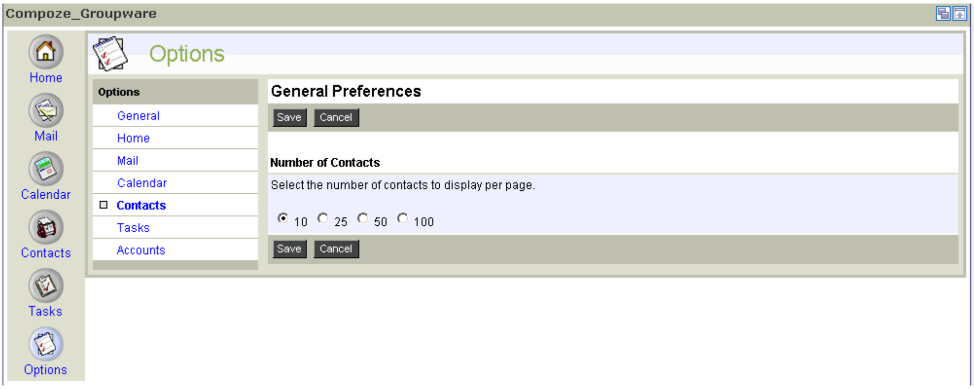
Time Intervals: (Day View) 30 minutes

Week Starting Day: (Week View) Current Day

Working Hours: Day start time: 8:00 AM
Day end time: 5:00 PM

# Contacts Preferences

In the Contacts Preferences menu, select the number of contacts to be displayed per page from 10 up to 100.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Options
Options
General
Home
Mail
Calendar
Contacts
Tasks
Accounts
Save
Cancel
Save
Cancel

General Preferences

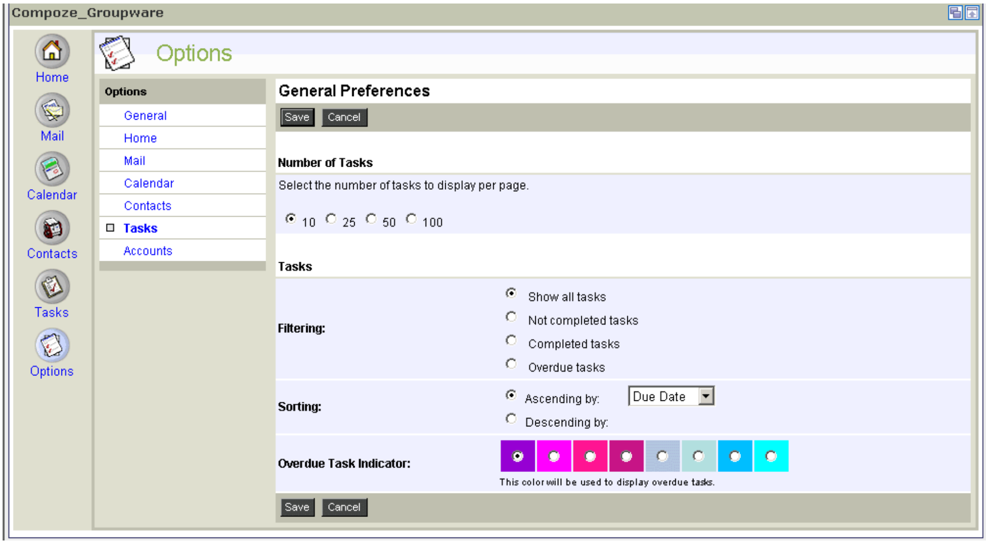
Number of Contacts

Select the number of contacts to display per page.

● 10 ○ 25 ○ 50 ○ 100

# Tasks Preferences

In the Tasks Preferences menu, select the number of tasks to be displayed per page from 10 up to 100. In addition, select how you want tasks to be filtered and/or sorted. You can also change the color of the overdue task indicator.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Options
Options
General
Home
Mail
Calendar
Contacts
Tasks
Accounts
Save
Cancel
Save
Cancel

**General Preferences**

**Number of Tasks**

Select the number of tasks to display per page.

● 10 ○ 25 ○ 50 ○ 100

**Tasks**

**Filtering:**
● Show all tasks
○ Not completed tasks
○ Completed tasks
○ Overdue tasks

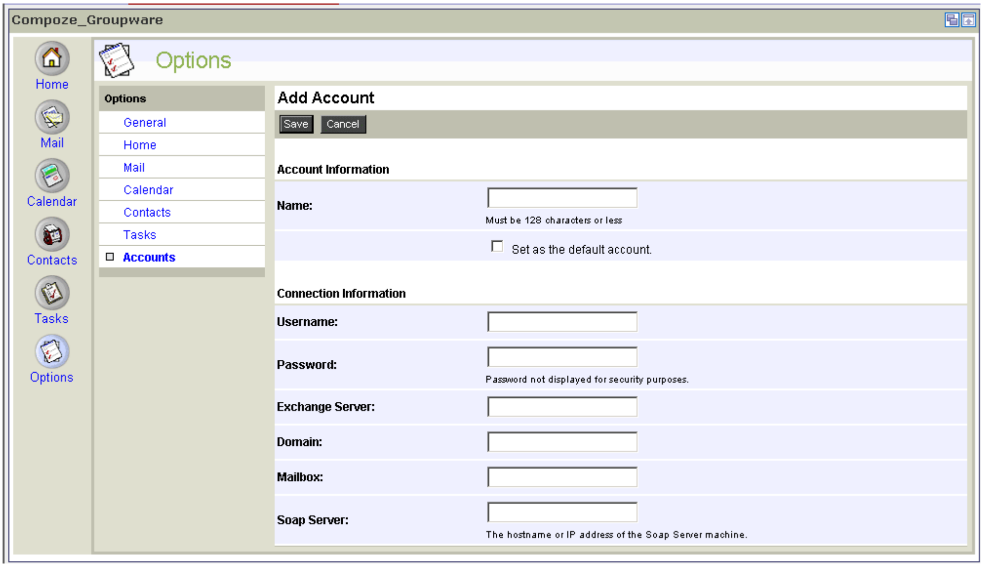
**Sorting:**
● Ascending by: Due Date
○ Descending by:

**Overdue Task Indicator:** ● ○ ○ ○ ○ ○ ○ ○

This color will be used to display overdue tasks.

# Accounts

WebLogic Portlets for Groupware Integration gives you the ability to view multiple Microsoft Exchange and/or Lotus Domino accounts without having to log in and out of the portal. To add multiple accounts, click the Accounts link in the Options Portlet.


Compoze_Groupware
Home
Mail
Calendar
Contacts
Tasks
Options
Options
Options
General
Home
Mail
Calendar
Contacts
Tasks
Accounts
Save
Cancel

**Add Account**

**Account Information**

**Name:** Must be 128 characters or less

☐ Set as the default account.

**Connection Information**

**Username:**

**Password:** Password not displayed for security purposes.

**Exchange Server:**

**Domain:**

**Mailbox:**

**Soap Server:** The hostname or IP address of the Soap Server machine.

Click **Add** to open the Add Account page. Enter in the appropriate information for that account. Your portal administrator will determine how much of this information needs to be entered. Contact your portal administrator if you do not know the correct account or connection information. Click **Save** to save your changes.

The next time you view the main Inbox page in the mail portlet, you will see all the accounts you have added in an Accounts menu on the left side. To view the mail in that account, click on it. All of the mail in the inbox as well as in the personal folders will appear.