



EPA Oracle Collaboration Suite (OCS) Training

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<http://portal.epa.gov/>



For Conference Purposes Only



Welcome and Overview



Purpose of the Session



- ❖ To provide an understanding of:
 - The features and capabilities of the Oracle Collaboration Suite (OCS) in the EPA Portal
- ❖ At the end of the session, attendees shall be able to:
 - Create a workspace in OCS
 - Use the following features of a workspace
 - Upload and view a file to the library
 - Post an announcement
 - Hold a discussion on the team discussion board
 - Create, assign, and update a task
 - Add a meeting to the team calendar
 - Use Instant Messaging
 - Use Web Conferencing



Overview



- ❖ An overview of collaboration needs
- ❖ EPA Portal overview
- ❖ OCS overview
- ❖ Workspaces
 - Review the Steps needed to create a workspace
- ❖ Review the different features of a workspace
 - Meetings, Tasks, Announcements, Discussions, and Views
- ❖ *DEMONSTRATION*: Create a workspace and use its features
- ❖ *DEMONSTRATION*: Use OCS to solve user needs
 - Show how to collaborate on a document using Discussion Forums
 - Show how to have two people edit a document at the same time using Web Conferencing
 - Show how to schedule a Web Conference to give a presentation
 - Show how to set up and use Workflow





Collaboration Needs



Questions



❖ What are your collaboration needs?



Collaboration Needs



- ❖ Store team files in a central location for all Team members to access from any place with an internet connection such as:
 - Team Meeting Notes
 - Reference Files
- ❖ Collaborate Author, or Comment on a draft document such as:
 - PowerPoint Presentations
 - Team Work Plan
- ❖ Conduct an online meetings to:
 - Give presentations to people in different locations
 - View the same document
- ❖ Manage Tasks by:
 - Defining project tasks and make team assignments
 - Monitoring progress of critical tasks





EPA Portal Overview



What is the Purpose of the EPA Portal?



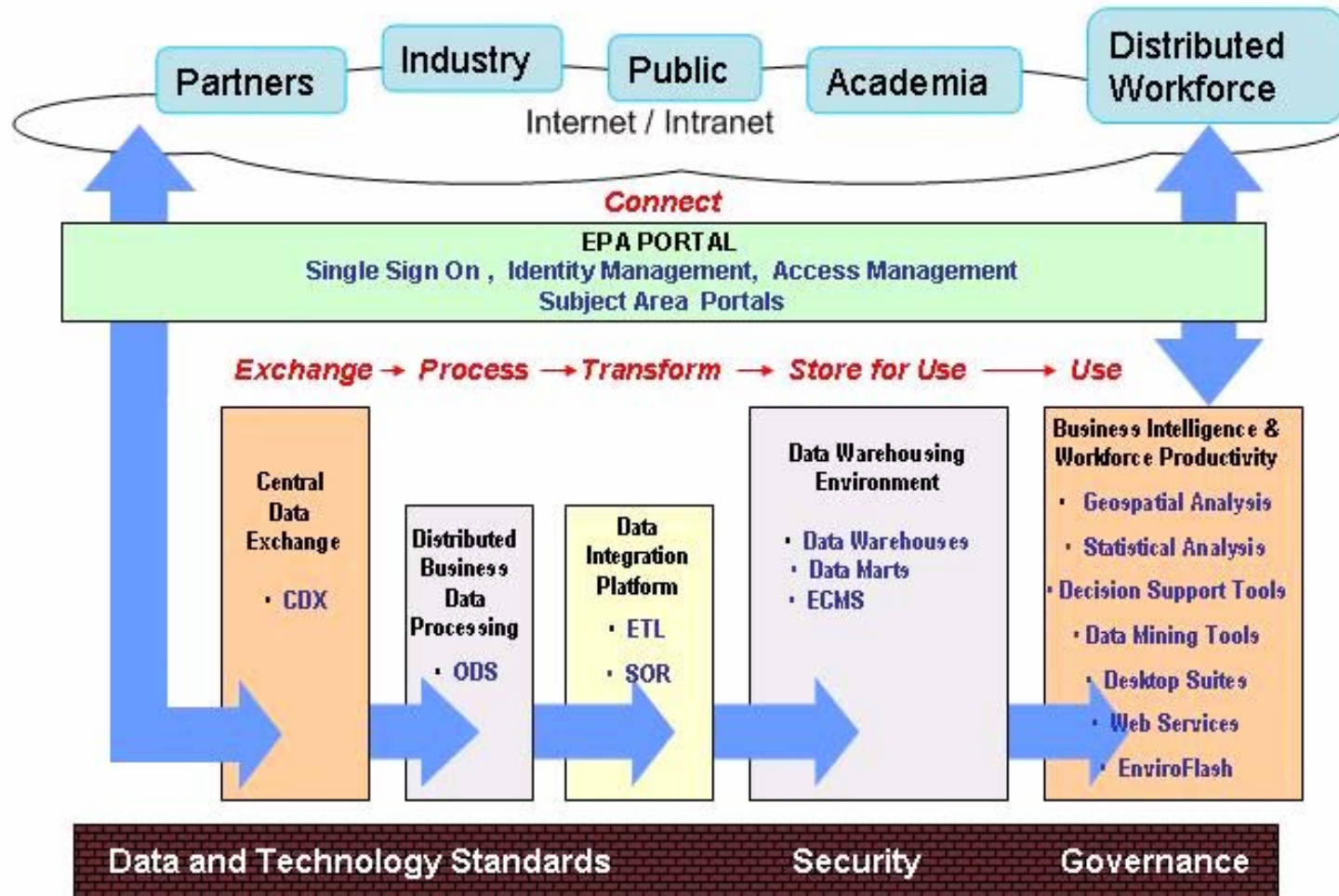
- ❖ The EPA Portal was created to meet the following business needs:
 - Improved organization and discovery of information resources - community paradigm
 - Improved framework for internal/external communication and collaboration
 - Enhanced access control to information resources
 - Integrated application development environment
 - Reduced time to market
 - Data sharing and Integration
 - “One Stop Shop” concept



Enterprise Target Application Architecture



Target Applications Architecture: Modernization Blueprint focused on Data Integration





- ❖ A dynamic and personalized Web system that provides EPA users:
 - Environmental information
 - Analytical tools and data reports
 - Security controls
 - Document sharing
 - Collaboration services
- ❖ The Portal is the one-stop source of information on Environmental Health, Environmental Sciences, and Human Health Protection
- ❖ The Portal will be the single URL for Agency business partners to trade information and conduct business with EPA



EPA Portal Features



- ❖ The EPA Portal provides an gateway to EPA's information resources that:
 - ✓ Facilitates real-time **collaboration** with internal and external peers to share ideas and knowledge
 - ✓ **Organizes** resources to easily find data sources and analytical tools
 - ✓ Allows Program Offices and Regions to **share** their solutions and knowledge with interested individuals
 - ✓ Allows you to **personalize** your Portal to your own needs, and preferences



EPA Portal Features



- ✓ Enables communities of users with similar interests to **customize** pages, displaying the data and tools relevant to their business needs
- ✓ Ensures **controlled, authorized access** to Portal content, systems and tools and provides for centralized management of user identities
- ✓ Allows for **growth** and maturation as new requirements and opportunities to employ new tools are identified
- ✓ Provides a **single web address** and standard interface for Agency business partners to trade information and conduct business with EPA



EPA Portal Communities



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Oracle Collaboration Suite (OCS) Overview



OCS Overview



- ❖ Oracle Collaboration Suite (OCS) provides:
 - A secure virtual collaboration space to share and collaborate on project information
 - The ability to share knowledge and ideas with EPA employees and external users (e.g. State and Local users, contractors without EPA LAN accounts, etc.)

- ❖ Tools available in OCS:
 - Workspaces
 - Content Services
 - Web Conferencing



Workspaces



- ❖ A Workspace is a team-based tool designed to track and manage content and project communications
- ❖ Workspaces provide a single place to utilize, organize, and view the following tools:
 - **Meetings** provides a single place to record team activities
 - Does not interact with the Lotus Notes calendar
 - **Tasks** allows a team to keep the tasks a team needs to complete in one central location
 - **Announcements** allows team members to broadcast information that the entire team needs to know
 - Eliminates the need to send notification messages and records the announcement and the time it was created
 - **Views** enables team members to make a custom collection of workspace items that they can easily use the items without going into each specific section of the Workspace



Content Services



- ❖ The Content Services feature provides users with a document repository to access files and documents within the collaboration environment
 - Share and modify files while simultaneously working with team members
 - Able to access content using FTP, HTTP, and WebDAV
 - Provides content versioning and workflow



Web Conferencing



- ❖ Web conferencing is used to conduct live meetings or presentations over the Internet
- ❖ Hold group meetings and presentations with attendees in different geographical locations
- ❖ The EPA Portal provides a venue for EPA users to utilize Web Conferencing to:
 - Broadcast presentation to EPA staff in different geographical locations
 - Co-Author a document in real-time
 - Submit questions to the presenter

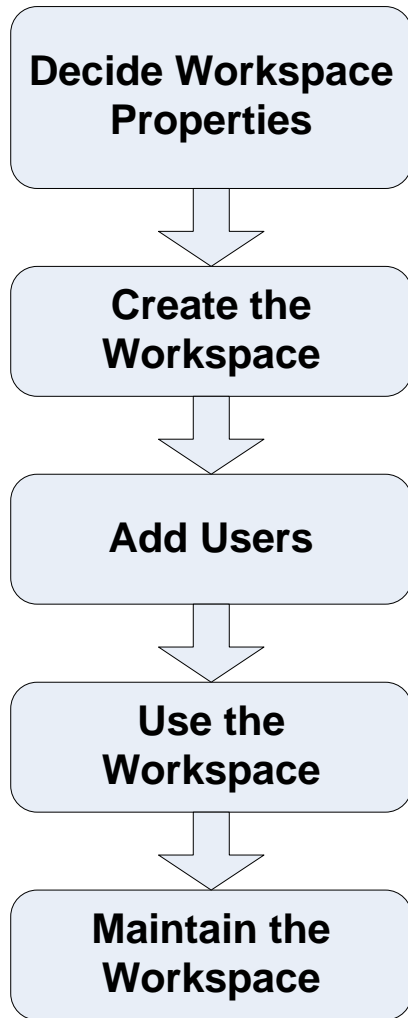




Workspaces



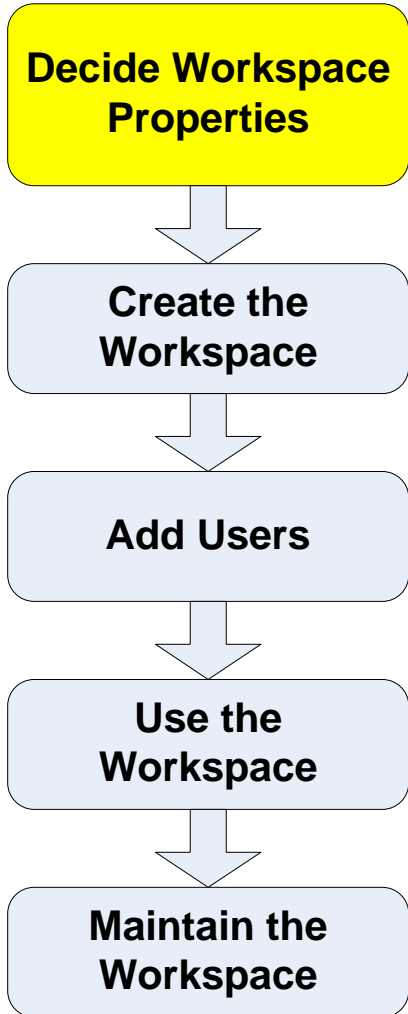
Steps To Create a Workspace



- ❖ **Decide Workspace Properties** that effect how the workspace behaves
- ❖ **Create the Workspace** for users to access
- ❖ **Add Users** to the workspace
- ❖ **Use the Workspace** to collaborate on team work
- ❖ **Maintain Workspace** by removing users who are no longer members of the team



Workspace Properties

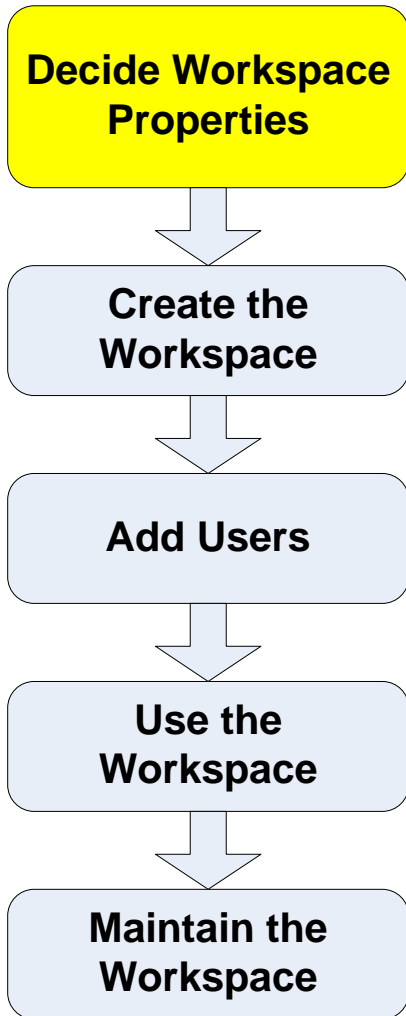


❖ The Workspace has a number of properties that effect how the workspace behaves. There are:

- *Workspace Name* is the unique name of the workspace
- *Display Name* is the name displayed to the end users
- *Description* is a text description of the workspace



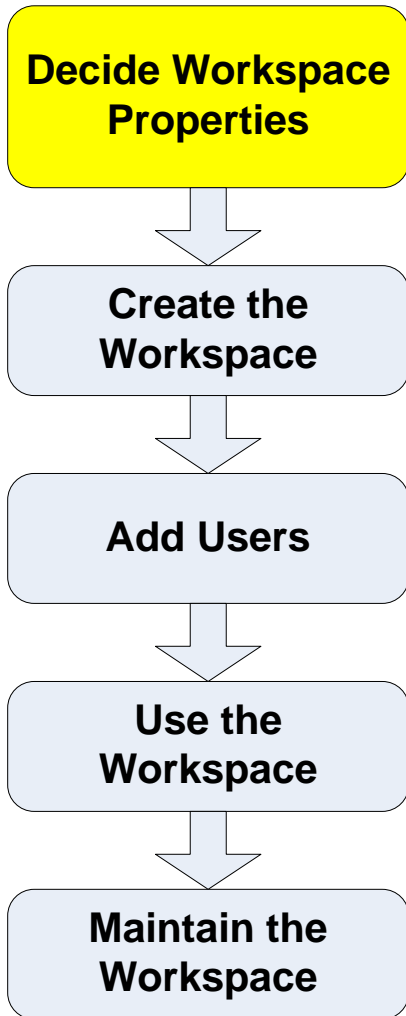
Workspace Properties



- *Default Member Role*
 - Read – Users can only read the content of the Workspace (Default)
 - Writer – Users can read and write to the Workspace. Specifically, they can add new folders to the *Library*, upload files, schedule meetings, create tasks, and participate in discussions
 - Administrator – Users can do everything that writers can do. In addition, they may also manage Workspace configuration
- *Membership Access*
- *Membership Notification*
 - All Workspace members (default)
 - Only affected members
 - Disable notifications



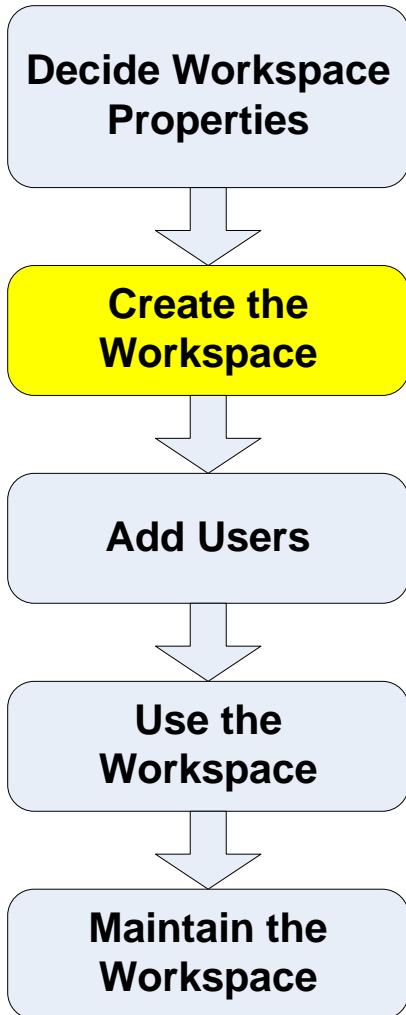
Workspace Properties



- *Workspace Listing*
 - Publicly Listed (default) means that any Portal user can search the name, display name and description of the Workspace even if they are not members of the workspace
 - Only Viewable to members means that only members can find this workspace
- *Add to Favorite Workspaces* adds the workspace to the creators favorite workspaces



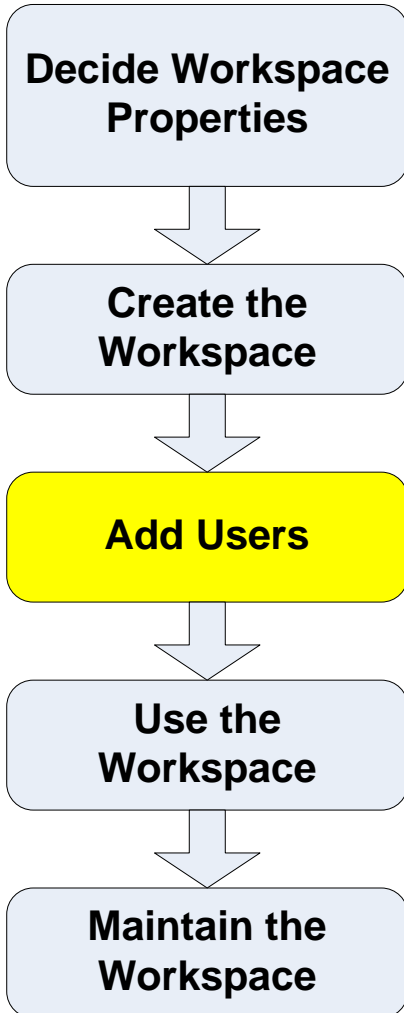
Create Workspace



- ❖ **Create the Workspace** for the users to access:
 1. Open a browser and navigate to <http://portal.epa.gov>
 2. Login with your LAN userID and password
 3. Under the *General Pages* community heading, click the *Team Resources* link
 4. In the *Collaborative Workspace* portlet, click the *Enter Collaborative Workspace* link
 5. Click on the *New Workspace* button to create a new workspace
 6. Select *Basic Workspace Template* (default) radio button
 7. Fill out the *Workspace Properties* form
 8. Click the *Ok* button



Add Users



Add Users to the workspace :

- Navigate to the workspace home page
- Select the *Members* link from the left navigation bar
- Select the *Add Members* button
- In the User ID text box, type any part of a Portal User name, and click the search icon next to the text box
 - Note: If you do not type a name, the search results will return every Portal user
- In the new window, select the radio button of the Portal user you wish to add to the workspace
- Click the *Select* button
- Select the role you wish the new member to have
 - Writer (default)
 - Reader
 - Administrator
- Click the Select Button
 - Note: The Portal user has **not** yet been added to the workspace
- Click the *OK* button



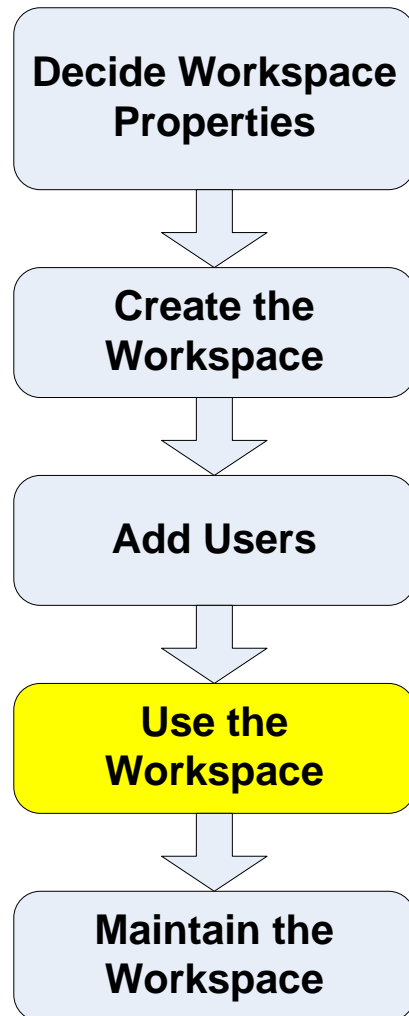
Demonstration



- ❖ Create Workspace
- ❖ Add Users



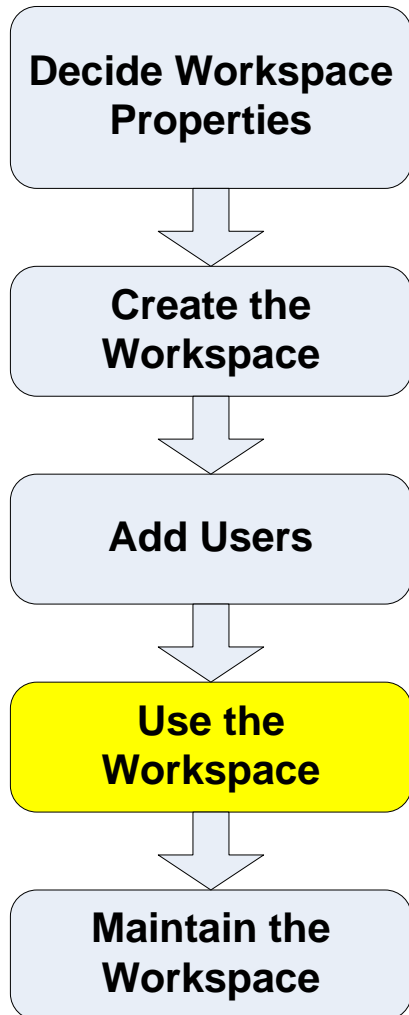
User Workspace: Library



- ❖ The Library allows a team to post documents to share between the team members
- ❖ Features
 - Creating Folders within Workspaces
 - Posting Documents to Workspace Libraries
 - Notifying users of Workspace postings/new content
 - Managing access to Workspaces and folders
 - Viewing Workspace Member profile information
 - Searching Workspace content
 - Using Versioning and Workflow
- ❖ Attention:
 - The default workspace storage size is 50MB. More can be requested
 - Creating file versions can use the quota faster than anticipated (e.g. 10 versions of a 1MB file uses 10MB)



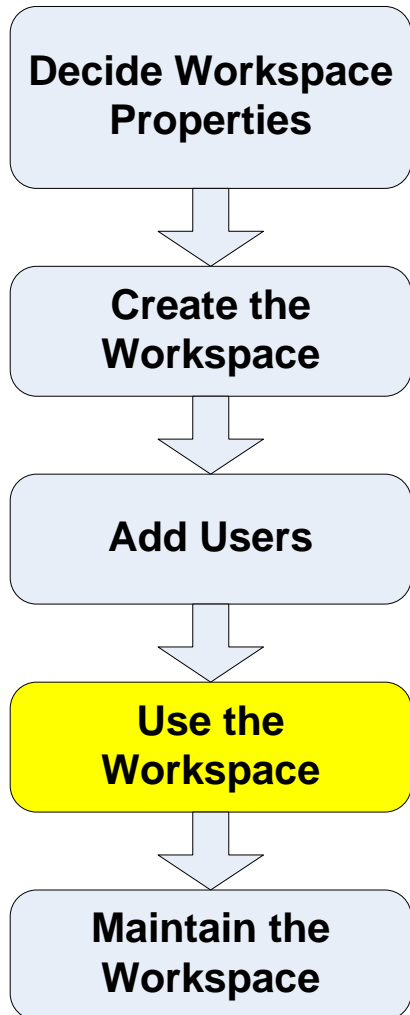
Use Workspace: Meetings



- ❖ The Meetings section of a workspace allows team meetings to be posted in a central location
- ❖ Features:
 - Add a meeting
 - Delete a meeting
 - View meetings
- ❖ Attention:
 - The workspace calendaring function does not integrate with Lotus notes



Use Workspace: Tasks



❖ The Tasks section allows tasks to be assigned and tracked in a central location

❖ Features:

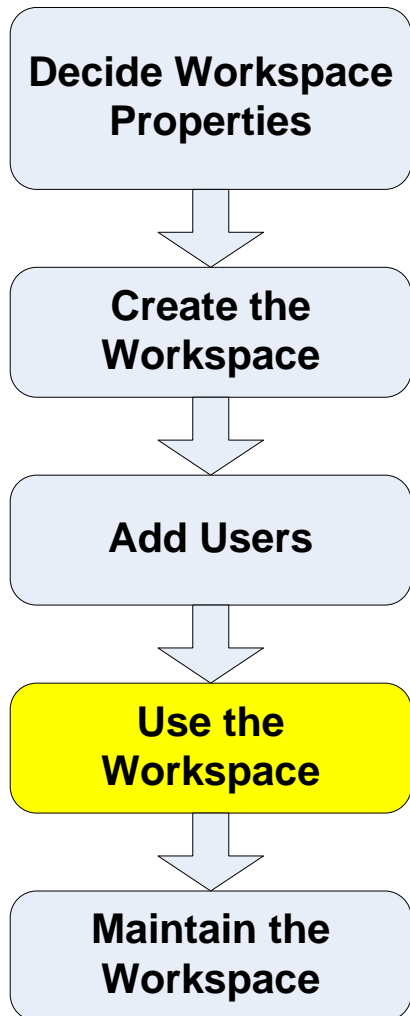
- Add a task
- Update progress
- View tasks

❖ Attention:

- Does not sync with Lotus notes



Use Workspace: Announcements



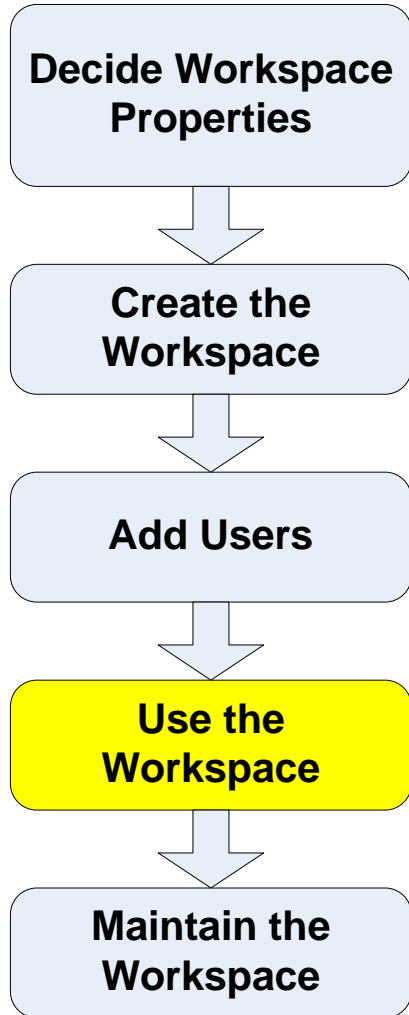
- ❖ The Announcement section allows announcements to be broadcasted to the team members

- ❖ Features
 - Add an Announcement
 - Send an email of the announcement to the team

- ❖ Attention:
 - The emails from the workspace will be <workspace_name>@epa.gov. This email address does not exist. If team members respond to an email announcement, the email will bounce.



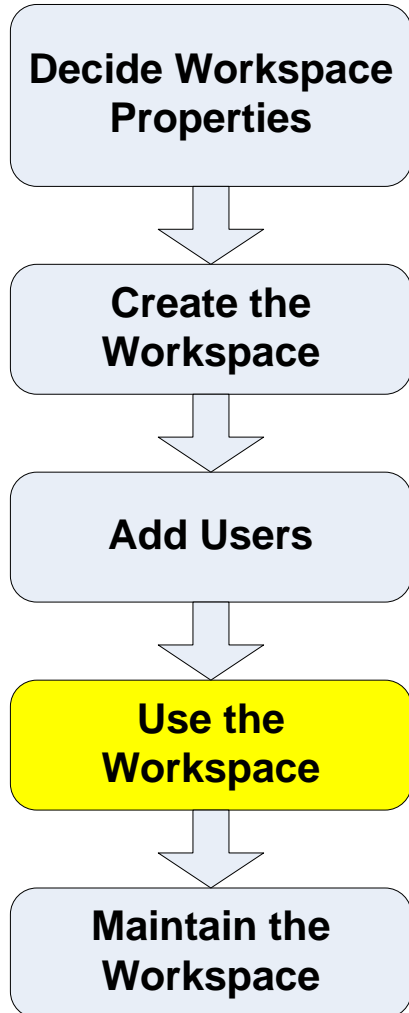
Use Workspace: Discussions



- ❖ The Discussion section allows the team members to hold threaded discussions in a central location
- ❖ Features
 - Creating Discussion Forums and Topics
 - Responding to Discussions



Use Workspace: Views



- ❖ Views allows a team member to identify and view items in the workspace of interest
- ❖ Features
 - Create a New View



Feature Demonstration



❖ Library

- Create a folder
- Upload a file
- Set up versioning
- Set up simple workflow
- Notify Others

❖ Tasks

- Create a task and assign to a team member
- Update the task status

❖ Views

- Create a view

❖ Discussions

- Create a discussion forum
- Post a topic
- Respond to a topic

❖ Announcements

- Post an announcement
- View an announcement
- Notify Others

❖ Meetings

- Post a meeting



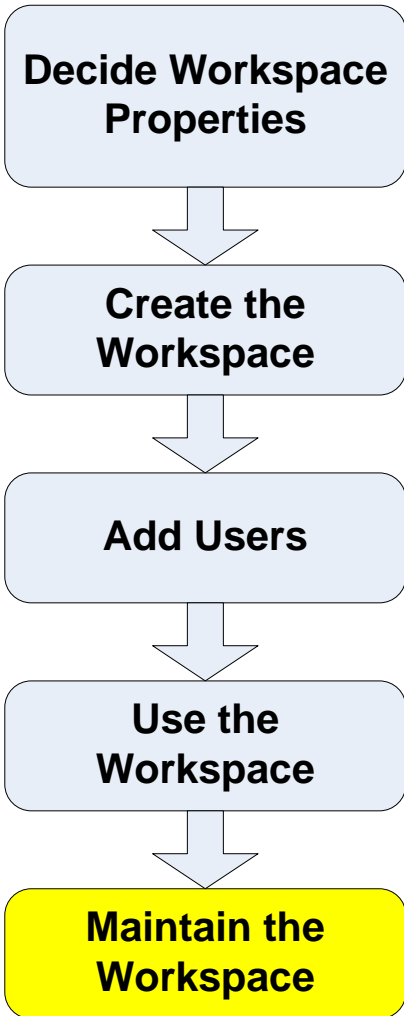
Solving User Needs with OCS



- ❖ How to collaborate on a document using Discussion Forums
- ❖ How to have two people edit a document at the same time using Web Conferencing
- ❖ How to schedule a Web Conference to give a presentation
- ❖ How to set up Workflow



Maintain Workspace



- ❖ Remove access to the workspace from old team members
- ❖ Remove the workspace if you're done using it



Conclusion



- ❖ Questions?
- ❖ For more information:
 - View Portal online Help
 - Call the Help Desk
 - Contact Terry Grady at Grady.Terry@epa.gov
 - Help Desk Phone Number: 866-411-4EPA (4372)

