

# Discussion Template Next Generation - An OpenNTF Project

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IBM is considering a contribution of the Lotus Domino discussion template to OpenNTF as an open source project. The purpose of this document is to generate feedback regarding this proposed project. The document describes some of our initial ideas on how to enhance the template, the proposed project schedule, community contributions. etc.

After reviewing this document, please use the 'Discuss' tab of the 'Discussion' project on [www.openntf.org](http://www.openntf.org). If for some reason you don't want to share your input publically you can also send a mail to Steve and Niklas directly (niklas\_heidloff at de dot ibm dot com and steve.castledine at uk dot ibm dot com).

Please note that none of the content in this database represents commitments or policy positions from IBM. Official commitments from IBM will be announced separately via the usual channels.

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# 1. Overview and Motivation

IBM Lotus Notes/Domino has provided a discussion template since version 1. It is a sample application that demonstrates the value proposition of Notes/Domino. It shows how customers can use Notes/Domino as an application development platform and how users can use Notes/Domino to collaborate by creating documents and responses which can contain arbitrary content (semi-structured data) including file attachments.

Since version 1 the discussion template has been extended several times to make use of some of the latest Notes/Domino application development features. The most recent significant extension was done in 8.5 when the web user interface was refreshed using the new XPages capabilities. While this delivered a new user interface for the web, the Notes client experience has not been updated and certain feature enhancement requests have not been addressed.

## Discussion template as open source

The Domino developer community has been extending the discussion template for almost two decades. IBM believes that open sourcing the discussion template on OpenNTF will tap the creative potential and ensure the next generation discussion template meets the communities needs.

This approach has also other benefits:

1. People (customers, ISVs, all other developers) can influence better the direction of this template by helping in different ways including coding;
2. Updates to the discussion template can be made available sooner than having to wait for the next Notes/Domino release;
3. Anyone may freely use the template as a base for their own similar applications subject only to the restrictions of the Apache license version 2.

## Option for IBM to take extensions into product

IBM will evaluate contributions made to the open source discussion template and consider adding them to the version of the template shipped with Lotus Notes and Domino. Some customers need a fully supported version of this template since they want to continue to base their production applications on it. The new OpenNTF Alliance provides a good IP model based on the Apache license (ALv2) that allows IBM or other companies to take the code and incorporate it into their commercially shipping products.

## Value proposition

One of the goals is to build the next generation of the discussion template so it can serve as THE Notes/Domino application development sample. For example, good coding practices should be used from which other developers can learn. Also developers should be able to use the new generation of the discussion template as starting point for their own applications by just removing pieces they don't need and adding other functions. In addition to this, the next generation should be built as a list of re-usable XPages controls so that certain controls can easily be reused in custom applications.

As other Notes/Domino applications as well the discussion will continue to have both a web user interfaces and rich client user interface including offline capabilities. An important value proposition of Notes/Domino applications is to support both a web and rich client interface including offline capabilities. The goal is to update the rich client user interface and provide functions that showcase the capabilities of the Notes client (e.g. add mails to discussion).

Furthermore new functions should be provided that many customers have asked for, e.g. different states of topics (draft, expired, archived, locked, etc.), categories of discussion topics, etc.

### **Schedule**

In Domino 8.5.1 there will be a couple of improvements in the discussion template. The idea is to make the 8.5.1 version of the template available as open source. Our goal is to produce a good build that could be demonstrated at Lotusphere 2010. This date determines a lot of milestones such as when other contributors need to be involved, how many iterations can be done before this, etc.

## 2. Schedule

A couple of facts and assumptions determine the high level schedule for the next generation of the discussion:

- The 8.5.1 template is the base for the first open source release since some optimization has gone into it. eGA for the English 8.5.1 is currently targeted for end of September.
- A good build/release with significant new features needs to be done by the beginning of December so that it can be demo'd at Lotusphere.
- Iterations should take 2 - 3- weeks.

### Key milestones

OpenNTF SC approval for new discussion project including final IP model (ALv2) approval  
07/17/09

Official OpenNTF announcement and call for contributors  
07/20/09

Identify additional contributors

Iteration 1: First open source version of discussion

Iteration 2

Iteration 3

Iteration 4: Lotusphere release

Iteration 5: Last 8.5.2 feature iteration

8.5.2 English eGA  
May 2010 ?

### ***1 Identify additional contributors***

The goal of this milestone is to define the roles in the discussion next gen OpenNTF project. For example project leads, committers, contributors, etc.

Furthermore we want to identify the key committers of this project who will help with the core implementation. Additionally it is desirable not only to find the contributors but also to agree at a high level what the contributors want to focus on.

Since we need to wait for the 8.5.1 version of the discussion as starting point and have the Lotusphere 'deadline' at the same time there is little time to actually do the coding. We should check whether some work can be done by contributors even before we make the first version of the discussion available as open source. This might require to open source the 8.5 discussion template first or an 8.5.1 CD ... tbd ...

## ***2 Iteration 1: First open source version of discussion***

### **Dates**

Start:

End: 10/02/09

### **Iteration objectives**

The English version of the 8.5.1 discussion template will be made available as open source on OpenNTF with ALv2 applied. This first version will only be developed by Steve and Niklas. There are some key extensions to the standard 8.5.1 template:

1. The discussion template will be built with a clean and modular architecture so that it is easily extensible.
2. A rich client version of the 8.5.1 web features will be provided using the same modern user experience.

### **User stories being addressed**

tbd

### **Team**

Iteration lead: tbd

Team: tbd

%time: tbd

### **Evaluation criteria**

tbd

## ***3 Iteration 2***

### **Dates**

Start:

End: 10/23/09

### **Iteration objectives**

tbd

### **User stories being addressed**

tbd

### **Team**

Iteration lead: tbd

Team: tbd

%time: tbd

### **Evaluation criteria**

tbd

## ***4 Iteration 3***

**Dates**

Start:

End: 11/13/09

**Iteration objectives**

tbd

**User stories being addressed**

tbd

**Team**

Iteration lead: tbd

Team: tbd

%time: tbd

**Evaluation criteria**

tbd

***5 Iteration 4: Lotusphere release*****Dates**

Start:

End: 12/04/09

**Iteration objectives**

This is the release that should be demonstrated at Lotusphere.

**User stories being addressed**

tbd

**Team**

Iteration lead: tbd

Team: tbd

%time: tbd

**Evaluation criteria**

tbd

***6 Iteration 5: Last 8.5.2 feature iteration*****Dates**

Start: tbd

End: February 2010?

**Iteration objectives**

This is the last iteration where minor features can be added. The focus of this iteration is to finalize all work that IBM requires to be done (e.g. UI/PII/string freeze) so that the discussion extensions could potentially go in 8.5.2.

tbd

**User stories being addressed**

tbd

**Team**

Iteration lead: tbd

Team: tbd

%time: tbd

**Evaluation criteria**

tbd

## **3. New Feature Candidates**

### **1 Overview**

There is a lot of potential new feature candidates. This chapter describes on a high level the main areas that are supposed to be extended.

#### ***Discussion Next Generation – New Features Overview***

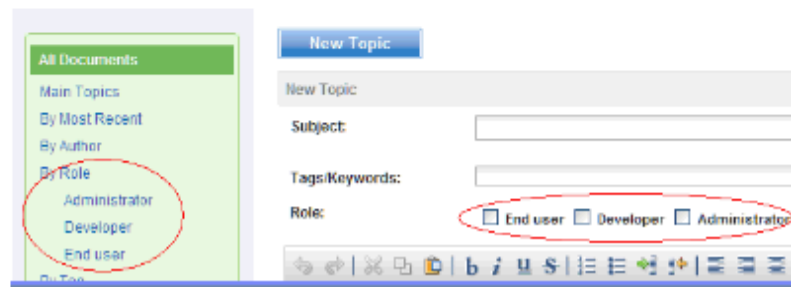
- New rich client UI and better web UI
- Better reuse, extensibility and customizability
- Enterprise readiness
- New end user functionality
- Virtual discussion instances

#### ***New Rich Client UI and better Web UI***

- The overall UX needs to be improved (e.g. real estate is wasted)
- The rich client UI needs to be redone since it is today weaker than the web UI
- Rich client UI and web UI should be similar/identical (through XPages) whenever it makes sense but rich client UI should be richer (e.g. drag and drop of attachments, add Notes documents to discussion, menu contributions)
- Various features need to be added (back) to the web UI (e.g. categories)

## ***Better Reuse, Extensibility and Customizability***

- Build application as set of re-usable controls that can be reused
- Allow more customizability/declarative custom changes without code changes (e.g. turn on certain features, what views to show, etc.)
- Provide sandbox model for typical extensions so that custom extensions are not overwritten when updating template versions
  - Allow custom fields in topics
  - Allow custom views (using custom fields)
- Provide (at least) one alternative stylesheet



## ***Enterprise Readiness***

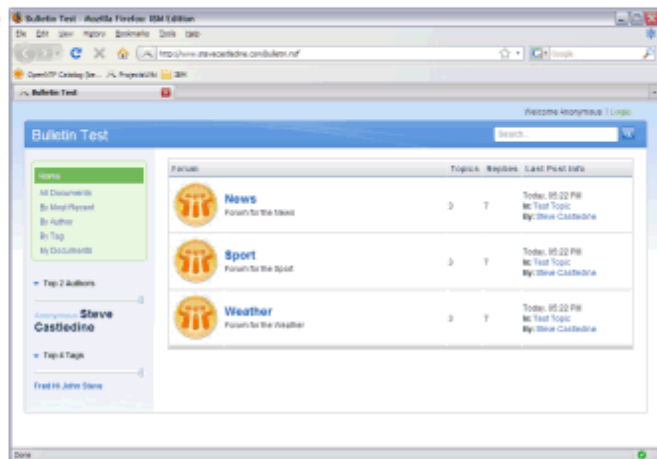
- Critical bug fixes (e.g. tag cloud, file upload control)
- Allow custom profiles
- Provide policies to enable/disable certain functionality (e.g. resource intensive tag cloud)
- Allow more extensibility (see previous slide)
- Document how to embed web UI in existing UIs

## ***New End User Functionality***

- States of topics (e.g. expired, blocked, not approved, draft, etc.)
- Better navigation to discussion (e.g. modern support for feeds, configurable email notifications)
- Better navigation within discussion (e.g. sticky notes, new view navigation, full text search)
- ... tbd ...

## ***Virtual Discussion Instances***

- Allow easier ways for end users to create discussion instances dynamically to increase the usage of this application in enterprises
- Within one discussion database several instances can be defined
  - End users don't have to be aware of other instances
  - ACLs are defined on the database level and on document level



## ***2 List of Features***

This chapter contains a list of features. They are in no particular order (e.g. not prioritized).

### **001: User profiles from other NSFs**

In 851 the user profiles need to be defined in the discussion database directly. However most users don't want to enter this data redundantly. This feature will allow pulling data from other discussion databases where users have already defined profiles or from any other custom Notes database.

This is the data that needs to be integrated from other databases:

Welcome Niklas Heidloff | [My Profile](#) | [Logout](#)

## Author Profile for Niklas Heidloff



Email:	niklas_heidloff@de.ibm.com	Role:	Architect
Phone:	+49-5258-000000	Goals:	Many

- All Documents
- By Author
- By Alternate Name
- By Category
- Author Profiles
- My Favorites
- My Interest Profile
- My Author Profile

Lotus Notes

### Author's Profile

Name	<b>Niklas Heidloff/Germany/IBM</b>	
E-mail Address	niklas_heidloff@de.ibm.com	
Phone	+49-5258-000000	
Role	Architect	
Goals	Many	
Other	Blog: <a href="http://www-10.lotus.com/idd/heidloffblog.nsf">http://www-10.lotus.com/idd/heidloffblog.nsf</a>	

This view isn't necessary if data is pulled from other NSFs:

Discussion	
	<a href="#">My Author Profile</a> <a href="#">Chat with Author</a>
Disc8.5	Name
	<b><u>Niklas Heidloff/Germany/IBM</u></b>
<ul style="list-style-type: none"> <li> All Documents</li> <li> By Author</li> <li> By Alternate Name</li> <li> By Category</li> <li style="background-color: #e0e0e0;"> Author Profiles</li> <li> My Favorites</li> <li> My Interest Profile</li> <li> My Author Profile</li> </ul>	

When integrating profiles data from other databases/systems, this data will not be available offline.

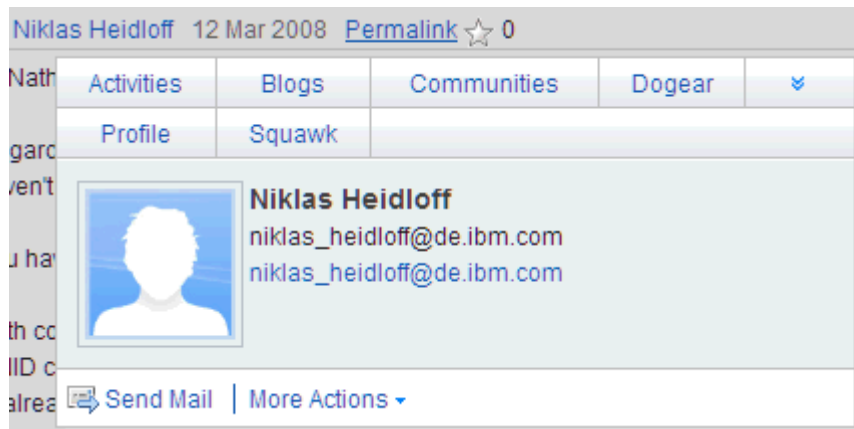
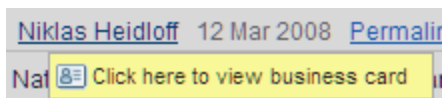
### 002: User profiles from other systems (non NSFs)

This extension is similar to this one (001) with the difference that profiles data is used from non NSFs. A good example is Connections profiles.

When integrating profiles data from other databases/systems, this data will not be available offline.

### 003: Hover over user profiles

Something like this ...



But with less data than in Connection profiles (just the data as in 851 discussion profiles).

Note: It should also be possible to initiate a chat with these people (see 014).

#### **004: More intelligent interest profile preferences**

In addition to these existing preferences ...

**Interest Profile Preferences for Niklas Heidloff**

**Inform me of new documents by these Authors:**

**Inform me of new documents in these Categories:**

**Inform me of new document Subjects containing these words or phrases:**  
(separate each listing with a new line )

... there need to be new and more important ones:

1. New responses to topics I created
2. Changes in topics I've commented on

And (1) and (2) should be turned on by default.

These preferences are stored per discussion database even if user profiles are read from other NSF/s/systems.

#### **005: Add missing 851 rich client features to web UI**

There are various features missing in the 851 web user interface that exist on the rich client. Except of some configuration features they should be added to the 851 user interface. Some of these features had existed in the web, but got lost when the 85 web interface was redone via XPages.

There are also features that are missing in the web user interface but that will be significantly be redone (e.g. See 017.01 and 021).

##### **005.01: Current user's interest profile**

## Interest Profile Preferences for Niklas Heidloff

**Inform me of new documents by these Authors:**




**Inform me of new documents in these Categories:**





**Inform me of new document Subjects containing these words or phrases:**


(separate each listing with a new line )





 All Documents


 By Author


 By Alternate Name

 By Category

 Author Profiles

 My Favorites

 My Interest Profile

 My Author Profile

### 006: Remove not used features

There are a couple of features that are either not even exposed in the user interfaces anymore, or they are redundant or they are not used by anyone. In order to reduce complexity and not to cause unnecessary performance overhead some of these features could be removed.

#### 006.01: Documents by author

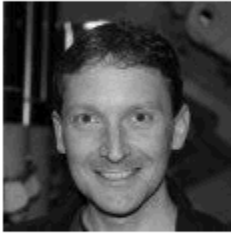
There are two ways in the 851 web user interface to find documents of a specific author. One of these features could be removed:

1. When clicking on person name (e.g. from author tag cloud or views):

## Test topic

| Created on Jun 18, 2009 7:17 AM by [Niklas Heidloff/Germany/IBM](#)

## Author Profile for Niklas Heidloff



Name: Niklas Heidloff/Germany/IBM  
Email: [niklas\\_heidloff@de.ibm.com](mailto:niklas_heidloff@de.ibm.com)  
Phone: +49-5258-000000  
Registered: 06/18/2009  
Main topics posted: 1  
Responses posted: 0

### Recent topics

Date	Topic
Jun 18, 2009	<a href="#">Test topic</a>

### Recent responses

Date	Topic
------	-------

## 2. By authors view

- All Documents
- By Most Recent
- By Author**
- By Tag
- My Documents

▼ 1 Authors

Niklas Heidloff

## All Documents by Author

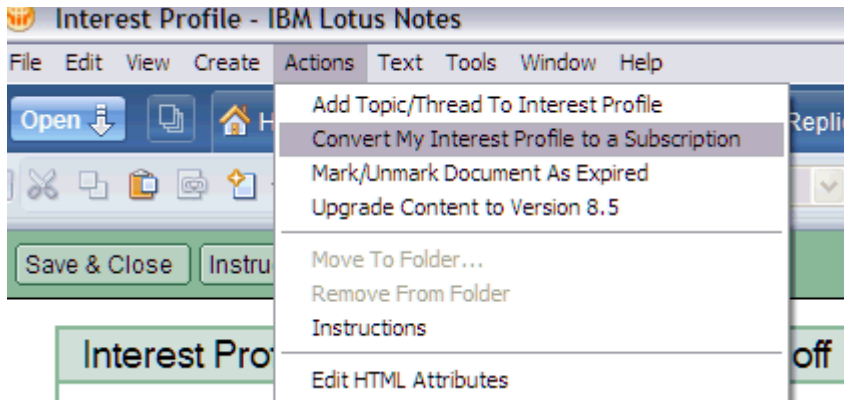
[New Topic](#)

Date	Topic
▼ Niklas Heidloff/Germany/IBM	
Jun 18, 2009	<a href="#">Test topic</a>

Show 5 | 10 | 25 | 50 | 100 entries

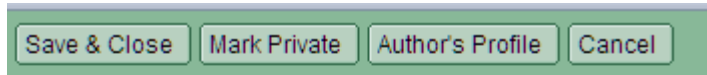
### 006.02: Subscriptions

Notes subscriptions (Notes R4 feature?) are rarely used. Proposal is to remove this from the UI to decrease the complexity.



### 006.03: Mark private

In the 851 rich client UI documents can be marked as private:



Discussion		<input type="button" value="New Main Topic"/> <input type="button" value="New Response"/> <input type="button" value="Chat with Author"/>	
Disc8.5	Date ^	Topic	
	★ 18.06.2009	Core architecture and work brea	
	★ 18.06.2009 12	▼ Feature candidates (Niklas Heid	
	★	▼ List of feature candidates (Nikla	
	★	001: User profiles from ot	
	★	002: User profiles from ot	
		PRIVATE: 003: Hover over	

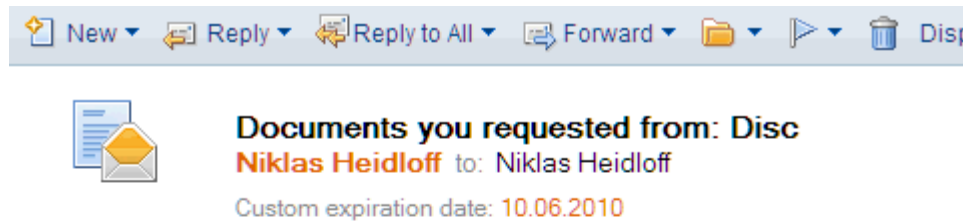
This feature doesn't make much sense though. It is rather desirable to mark a topic limited for a group of people only (not for one person only). This is another feature that might be added (see 011)

Users who have used this feature use it mostly for the purpose of marking a topic as draft (see 012.01).

### 007: Configurable notification emails

The notifications emails should look better, provide more meta data (e.g. first x lines of docs). Additionally it needs to be possible for customers to configure these notifications mails (e.g. add header, footer etc.).

Here is how they look in 851:



### Search Results

Local Database: CN=nheidloff-1/O=NHeidloff!!disc.nsf

Number of documents: 4

Link	Title
------	-------



adf



adf (Response to: "adf")



waer Niklas



afdsf Niklas (Response to: "waer Niklas")

Additionally there should be an option for users to un-subscribe these email notifications. In the easiest case this is just a link at the bottom that brings up the UI to change the user's interest profile.

### 008: End user triggered email notifications

End users should be able to send email notifications to certain users pointing to one specific topic or response.

Users should be able to define who to send this notification to:

- All people with access to discussion database
- All people who have contributed to topic
- Subset of people of the database or topic

These emails should also be configurable as defined here: 007

### 009: Report topic to moderator

Sometimes topics contain information that shouldn't be in the topic/discussion (e.g. confidential data). In this case end users should be able to report a topic to a discussion moderator.

### **010: Feeds for change notifications**

In addition to the email notifications there need to be feeds that users can subscribe to in order to get notified about changes. Users can then see these notifications in their feed reader of choice (e.g. Notes 8).

Users need to be able to subscribe to different feeds:

- All topics feed
- All topics and responses feed
- All changes in one topic or responses
- Everything as defined in user interest profiles (instead or in addition to email notifications)

Would be good to provide both RSS and Atom feeds.

### **011: Access rights on topic level**

Sometimes people don't want to have a discussion 'publically' (so that everyone with access to database can read it). Instead they want to limit read and write access to certain people only.

### **012: States of topics**

There have been many requests by customers for various states of topics. Many customers have implemented some of these states themselves. It would be good to provide (some of) these states out of the box.

All of them require new views so that users can browse to topics in certain states. Some topics with certain states (e.g. archived) should not show up in the standard views (e.g. all topics for end users). Also actions need to be added to assign these states when a topic is opened.

#### **012.01: Drafts**

Users should be able to create drafts of topics (not responses) so that they can continue later to write the topics before publishing them. There should be a view for the drafts of the current user and a list of all drafts for a moderator (or a general view where topics are categorized by state).

#### **012.02: To be approved topics**

Users should be able to mark a new topic as 'ready to be approved' so that moderators can review topics before they are published.

Some customers might want to restrict the creation of new topics to always go through this approval workflow first. In this case there should be a policy that prevents normal users to publish directly.

### **012.03: Expired topics**

Topics should be able to expire so that they don't show up in the standard views for end users anymore. This is important to manage the 'flood' of topics and make it easier for users to find the important topics. Often topics have only a short life cycle (e.g. 'car window is open') and should be cleared up automatically.

There should be separate features available:

- Auto expiration (configurable via policy)
- User triggered expiration timer (e.g. expire in x days)
- User triggered immediate expiration and keep active setting

### **012.04: To be archived topics**

Moderators should be able to mark topics as to be archived so that they don't show up in the standard end user views anymore (e.g. all topics).

When marked as such formulas can be written so that the documents are removed/archived via the standard Notes archive feature.

### **012.05: Censored topics**

Moderators should be able to censor a topic so that it doesn't show up in any standard end user view anymore (e.g. all topics).

## **013: Types of topics**

In addition to states of topics, topics can have different types (basically second dimension of states). For example sticky topics or read only topics.

### **013.01: Read only topics**

End users should be able to mark topics as read only so that nobody except of them (and moderator) can change them and nobody can create responses.

### **013.02: Sticky topics**

It should be able to mark certain topics as sticky so that they also show up at the top of a view (e.g. all topics view, most recent topics).

## **014: Instant messaging awareness**

It should be possible to see for all person names in the discussion to see whether they are online in Sametime (rich client and web). Plus it should be possible to start a chat by clicking on a person name.

This is related to profiles. There probably should be a person control that can be clicked and then an action (init chat or open profile) can be chosen.

## 015: Modern rich client UI

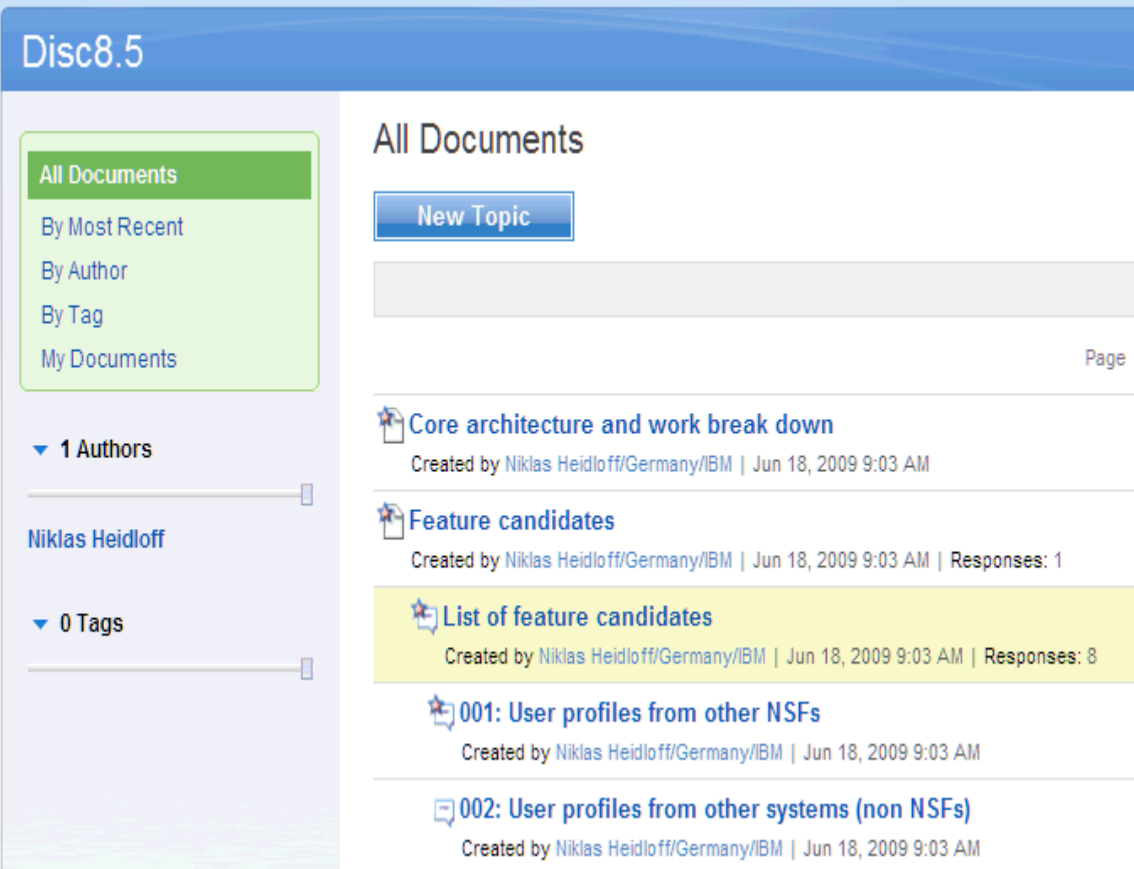
The goal is to provide a new rich client user interface.

### 015.01: Modern rich client UI consistent to web UI

In 8.5 the web user interface was refreshed via XPages for the core end user functionality. On the rich client the UI however is still the older UI. In 8.5.1 the XPages UI could be used on the rich client but the template still launches the classic rich client UI by default.

The goal is to update the rich client UI and make it consistent to the web UI whenever it makes sense. At the same time however the rich client UI should provide an even richer UI leveraging the rich client capabilities (see 016).

Examples: The standard functionality like view navigation and the rendering of topics should be identical:



The screenshot displays the Disc8.5 web interface. The header is a blue bar with the text "Disc8.5". On the left side, there is a navigation menu with a green header "All Documents" and sub-items: "By Most Recent", "By Author", "By Tag", and "My Documents". Below this, there is a section for "1 Authors" with a slider and the name "Niklas Heidloff". Underneath, there is a section for "0 Tags" with a slider. The main content area is titled "All Documents" and features a "New Topic" button. Below the button is a horizontal line with a "Page" label on the right. The list of documents includes:

- Core architecture and work break down**  
Created by Niklas Heidloff/Germany/IBM | Jun 18, 2009 9:03 AM
- Feature candidates**  
Created by Niklas Heidloff/Germany/IBM | Jun 18, 2009 9:03 AM | Responses: 1
- List of feature candidates** (highlighted in yellow)  
Created by Niklas Heidloff/Germany/IBM | Jun 18, 2009 9:03 AM | Responses: 8
- 001: User profiles from other NSFs**  
Created by Niklas Heidloff/Germany/IBM | Jun 18, 2009 9:03 AM
- 002: User profiles from other systems (non NSFs)**  
Created by Niklas Heidloff/Germany/IBM | Jun 18, 2009 9:03 AM

Disc8.5

**005: Add missing 851 rich client features to web UI**

Created on Jun 18, 2009 9:03 AM by [Niklas Heidloff/Germany/IBM](#)

There are various features missing in the 851 web user interface that exist on the rich client existed in the web, but got lost when the 85 web interface was redone via XPages. See the response documents for a list of those.

[Reply](#) [Edit](#) [Back to All Documents](#)

Replies:

[005.01: Current user's interest profile](#) Created on Jun 18, 2009 9:03 AM b  
[Read more...](#)

### 015.02: Interoperability between rich client and web UI

One example is that links to documents created in the rich client should also open the XPages UI of these documents.

From [Alexey Katyushyn](#):

<<Open notes-link from Body (created via Lotus Notes) in xPage, instead of MainTopic form.>>

### 016: Richer rich client UI

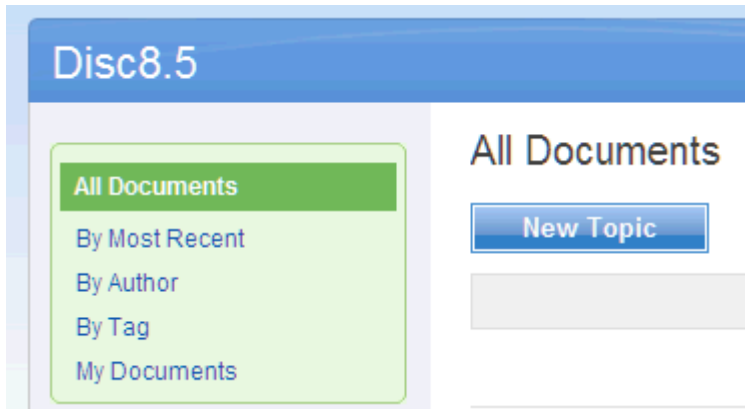
While the majority of the user interface should be consistent between rich client and web client (see 015), the rich client should provide more capabilities that are only possible in the rich client. Offline is obvious and comes basically for free with the Notes/Domino architecture but there should also be a richer user experience (e.g. 'add topic' as menu contribution or toolbar icon rather than HTML button).

#### 016.01: Actions integrated in rich client

While in HTML basically all actions are rendered in the big rectangle on the rich client actions are typically integrated in the overall rich client user experience. It needs to be defined how consistent we want to be to web user interfaces vs. how much we want to use a rich client user experience.

Scenario: Buttons

In HTML 'new topic' is a button (taking up a lot of real estate right now):



On the rich client it could be menu contributions under 'Create' menu or even 'Open' button.

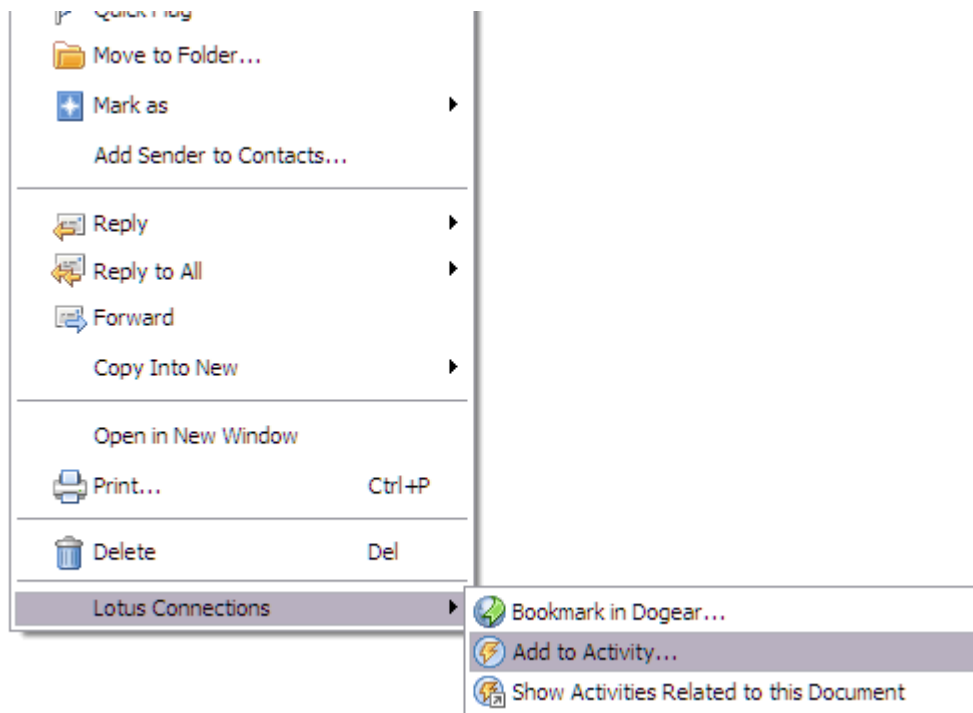
There could also be a toolbar be made available for discussion specific actions like 'create topic', 'create response', 'approve topic' etc.

### 016.02: Drag and drop of attachments

While on the web there are typically file upload controls where users browse to files, on the rich client it should additionally be possible just to drag and drop files to add them to a topic.

### 016.03: Add easily Notes documents as topics

Similarly to Lotus Connections Activities it should be able to easily add Notes documents (e.g. mails) as topics to the discussion (e.g. via context menu):



#### 016.04: Persist Sametime chats

From Peter D Presnell:

<<I think it would be a cool feature to have the ability to save Sametime Chat transcripts directly to a Discussion database. Discussion often start in a discussion database and then move to Sametime or even start in Sametime and need to be posted to a Discussion database.>>  
<<||

#### 017: Better ways to find interesting topics

When navigating discussion databases good functionality is required so that users can find the topics they are interested in. Different views and sort mechanisms like 'most recent', 'by author' etc. are needed. The response documents describe some additional functions and improvements to existing functions.

##### 017.01: User interested topics view

A new view should be provided with all topics that users have an interest in. This view however shouldn't be a static view that needs to be maintained manually (like My Favorites) but it should be more intelligent by using the users' interest profiles (see 004).

In 851 users can add personal favorites to a favorites folder (rich client only) that should be merged with the new 'user interested topics view'.

Discussion		New Main Topic	New Response	New Response to Response
Disc8.5		Date ▾	By ▾	Topic ▾
	★	18.06.2009	Niklas Heidloff	Core architecture
All Documents				
By Author				
By Alternate Name				
By Category				
Author Profiles				
My Favorites				

##### 017.02: Better UX for view navigation

With the 851 web user interface it is very hard to find interesting topics via view navigation. Part of this is a rather poor real estate management. There are also some inconsistencies to the normal Notes/Domino view navigation around expand/collapse.

Some draft thoughts:

This is for usability when you compare against existing notes.net forums which people like, notes client and other successful forum software. I think in comparison usability is poor - from not being

able to click any link from adding an entry, views rows too fat so cannot view many at once, confusing terminology (expand/collapse etc).

We have a restricted number of entries in users view - if we compare:

Notes.net - 24 visible entries without scroll

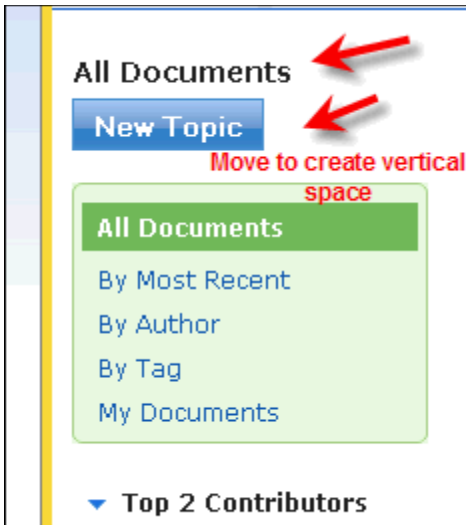
Notes client - 34

**8.5 Forum - 10**

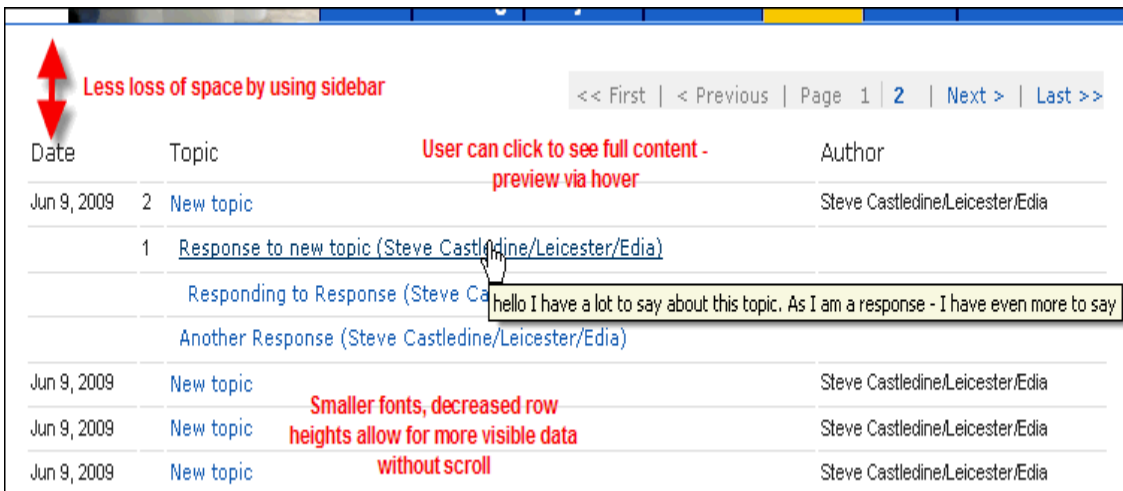
New Forum 30

So is caused by too much space per row - font can be smaller and increased by user in browser on need.

New topic can go sidebar - to allow more vertical screenspace. Maybe even title - although not sure (the xpage html made it difficult to use the space well alongside the pager).



Using vertical space better has more visible entries without scrolling, together with better use of space per row (not complete yet). There was a 1 click gesture of view content - so why not have that 1 click just go straight into the topic view? Any preview can be done on hover:



Afterwards I saw that the 8.5 forum does this pretty much anyway. It just needs tidying up.

**Topic Title**  
Created by [Steve Castledine](#) | 9th June 2009

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas vitae urna id neque placerat porttitor. Proin vitae enim diam, a luctus ante. Nulla pellentesque pulvinar nisi quis convallis. Curabitur sit amet neque vel magna consequat pretium.

Nam est est, aliquam id consectetur vel, eleifend ut ante. Nullam nec lacus locus, sed congue neque. In sit amet nunc orci, sit amet consectetur nibh. Mauris pretium lacinia dui, nec porttitor eros mollis eu. Nullam porta sollicitudin nibh, sit amet pellentesque tortor ultricies id. Praesent sodales commodo turpis, pharetra egestas ipsum fringilla eu.

**New topic**  
Created by [Steve Castledine/Leicester/Edia](#) | Jun 9, 2009 6:27 PM  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas vitae urna id neque placerat porttitor. Proin vitae enim diam, a luctus ante. Nulla pellentesque pulvinar nisi quis convallis. Curabitur sit amet neque vel magna consequat pretium. Nam est est, aliquam id consectetur vel, eleifend ...

**Response to new topic**  
Created by [Steve Castledine/Leicester/Edia](#) | Jun 9, 2009 7:00 PM  
hello I have a lot to say about this topic. As I am a response - I have even more to say

**Responding to Response**  
Created by [Steve Castledine/Leicester/Edia](#) | Jun 9, 2009 8:18 PM  
hi

**Another Response**  
Created by [Steve Castledine/Leicester/Edia](#) | Jun 9, 2009 8:17 PM  
Hi

**New topic**  
Created by [Steve Castledine/Leicester/Edia](#) | Jun 9, 2009 6:27 PM  
hello

**New topic**  
Created by [Steve Castledine/Leicester/Edia](#) | Jun 9, 2009 6:27 PM  
hello

Links to postings display this page - main topic at top - replies underneath - in full so conversation can be read properly.

Each entry can be replied to and the reply inserted at that point

If a response is clicked from the main view that response goes to the top of the page (via html anchor) - user can still scroll back

### 017.03: Improved full text search

The full text search in 851 has some limitations. For example search results cannot be re-sorted.

Also there is no way to do parametric searches (e.g. search for topics with certain state).

### 018: Better navigation within topic

It should be possible to see in an opened topic where in the tree the user currently is. In 851 only the responses to a document are shown, but not the parents.

Disc8.5

All Documents  
By Most Recent  
By Author  
By Tag  
My Documents

▼ 1 Authors  
Niklas Heidloff

▼ 0 Tags

## 005: Add missing 851 rich client features to w

Created on Jun 18, 2009 9:03 AM by Niklas Heidloff/Germany/IBM

There are various features missing in the 851 web user interface that exist on tl existed in the web, but got lost when the 85 web interface was redone via XPa

See the response documents for a list of those.

[Reply](#) [Edit](#) [Back to All Documents](#)

**Replies:**

[005.01: Current user's interest profile](#) Created on Jun 18, 2009  
[Read more...](#)

Additionally to better use real estate it needs to be possible to only show the subjects of responses and parents.

### 019: Better navigators

Better navigators to views inside of the discussion and also to other resources.

#### 019.01: Hierarchical navigator

The navigator needs to support hierarchical views and a collapse/expand function since several additional views (for topic states and custom views) should show up there as well.

Example:



### 019.02: Resource links

From [Peter D Presnell](#) and [Alexey Katyushyn](#):

<<One of the most common requests I get to customize discussion template is to add a section in which links to resources relevant to to the discussion. This includes file attachments, links to Web sites, and links to other Notes applications. It would be nice if we could add a visual element to the discussion template where these items could appear and then provide a mechanism for maintaining this.>>

<<Ability to open certain documents directly from navigator. Documents can be specified by UNID, or a unique keyword. This is sought after in case frequently used documents and documents such as FAQ, rules, etc.:>>

### 020: More extensibility, customization and reuse

In most cases customers might want to extend and modify the discussion template to their needs. The responses to this document describe some of these typical extensions that should be as easy as possible.

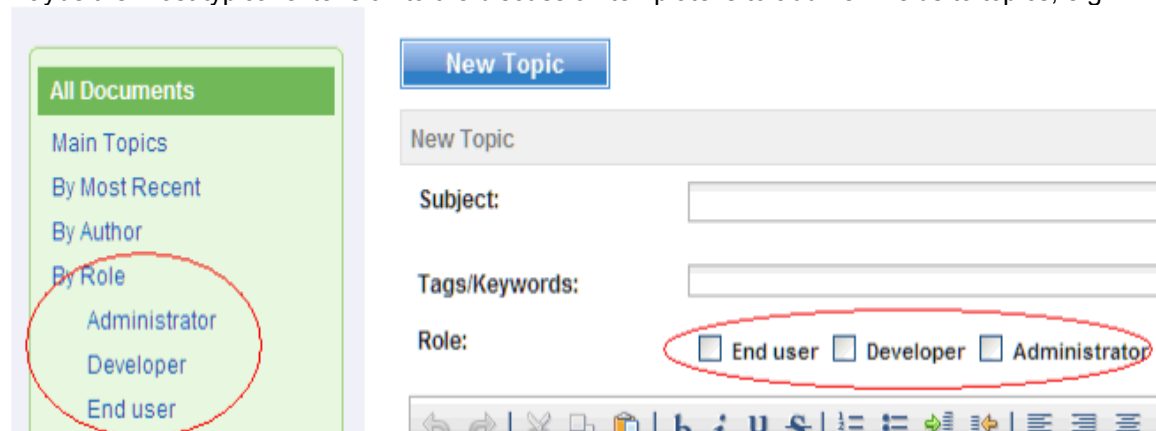
#### 020:01: Allow custom views

Notes/Domino always allows the creation of new views but for the discussion we also need to allow these views to show up in the navigator and to use the same look and feel like the other views. These custom views often use custom fields to filter topics.



### 020:02: Allow custom fields in topics

Maybe the most typical extension to the discussion template is to add new fields to topics, e.g.



This needs to be possible without touching the original design elements.

### 020.03: Provide one additional stylesheet

CSSs allow the modifications of the look & feel of the HTML based user interface. While in theory every XPages app can be changed via stylesheet changes it is something not easy (e.g. not documented, not all stylesheet information within nsf, etc.). So the goal is to provide at least one additional stylesheet as demo how the styles can be changed.

### 020.04: More customization

Customization (as opposed to extensibility) is done via declarative changes. More options than in 851 should be provided.

In 851:

## Web Configuration Profile

### Web page custom branding:

Attach company logo here:



The image file you attach here will be shown at the top of the browser window. Attach one file only.

Alternate logo text:



The text will be shown when hovering over the logo image.

Page footer text:



The text will be shown at the bottom of the browser window.

### 020.05: More policy control

There need to be more options for admins to control what features can be used on how. For example they might want to turn off the rather expensive tags.

Tags (turn on/off, which ones, who can create)

Categories (turn on/off, which ones, who can create)

All new topics require approval first

...

### 021: Categories

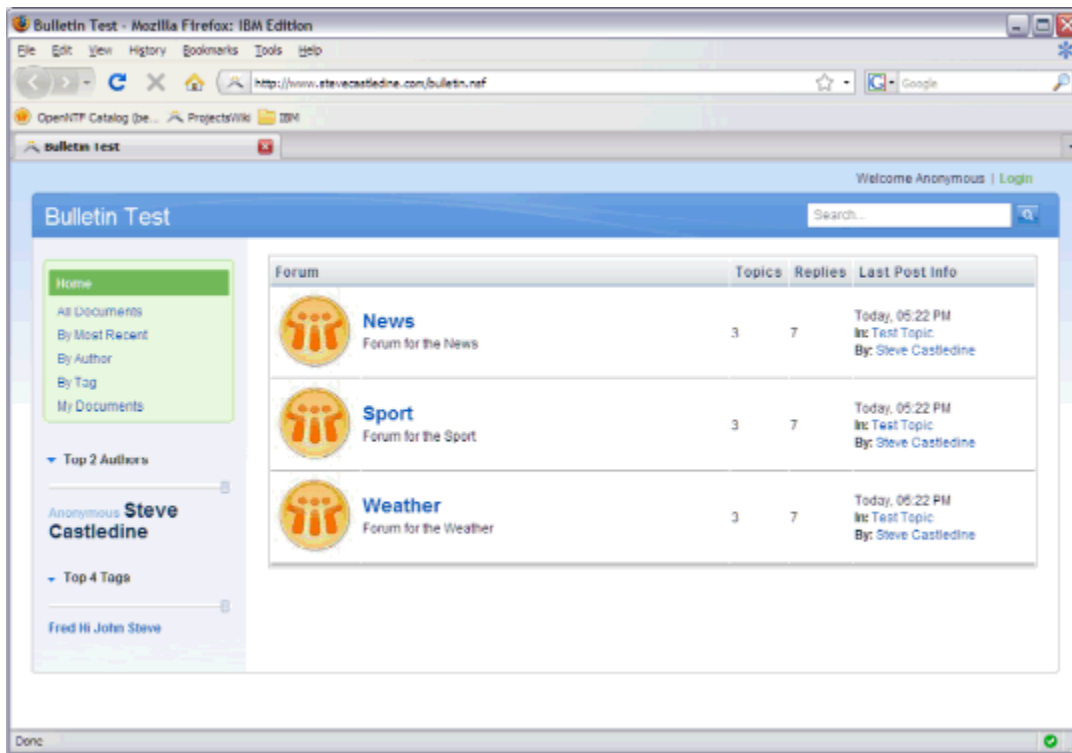
Categories in discussions allow the categorization and filtering of topics to easier find interesting topics. There used to be user visible categories in the template and they still exist in the 851 rich client version but in the 85 web version they got lost. More precisely they got merged together with tags which is really a different concept. Tags are more global and more often user defined than predefined. The goal is to provide both categories and tags.

Categories can even be considered as a mechanism to have multiple discussion instances within one discussion database. End users could access a discussion instance and not even know that there are other instances in the same database. Additionally sometimes it could also be desired to give users this awareness and allow them to navigate to other categories of same database (as in 851 rich client user experience).

It needs to be defined how independent these categories/forums are from each other. For example are there different moderators per category? Apply tags to all documents in database or just documents of category, etc.

#### 021.01: List of categories/home page

There needs to be an entry point for users to the discussion from where they can choose the categories (= forums?) they want to navigate to. Once navigated to such a forum the views (e.g. all docs) only show documents of this forum/category.



It also needs to be possible to provide users links to certain categories/forums directly.

### 021.02: Management of categories

It needs to be possible for moderators to create, rename, change logs, delete etc. these categories. Might be ok to only provide a rich client version to do this if it makes things simpler.

It needs to be defined how independent these categories/forums are from each other. For example are there different moderators per category? Apply tags to all documents in database or just documents of category, etc.

### 021.03: Discussion enable other applications

From [Peter D Presnell](#):

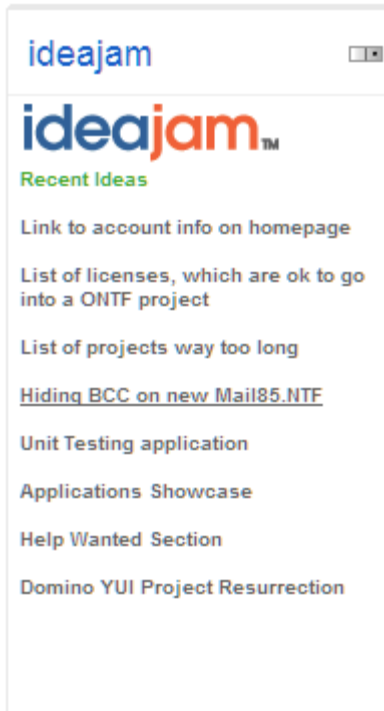
<<I would be interested in seeing the discussion template also being able to be used as an enabler for existing applications that are not discussion databases but need to have a discussion capability added. This could be a separate area in the application for discussion or to allow discussion threads to be "attached" to existing documents.>>

This idea has been put under '021 categories' since categories might enable this feature. Categories won't be the full solution for this feature though.

## 022: Embed-able what's new control(s)

Embed-able what's new controls should be made available for web applications and the rich client. This might or might not be the same impl.

Similar to ideajam:



## 4. Contributors

### 1 Roles and responsibilities

This chapter contains information about committers and contributors to this project. We haven't fully defined how we choose contributors, what the different types of contributors may/have to do, how many we should have, etc. Here are just some high level ideas and comments:

There will be different types of contributors. All approved OpenNTF contributors can potentially contribute to this project. For example everyone can send bug fixes to one of the project committers so that the committers can apply them to the source.

There also need to be clear responsibilities as to who owns/leads the project. Steve Castledine and Niklas Heidloff will be two project owners of the discussion project. This is to ensure that all changes could be taken back into the Notes/Domino product.

Between the project owners and the 'bug fix' contributors there is another class of contributors who owns bigger pieces of the template. We need to define which of these people are also committers vs contributors and what responsibilities and duties they have. We also need to define how many of these people we want/are efficient to participate.

We're trying to break down the work in separate pieces so that the different people can work together (see below). Some of this work requires XPages skills, but not everything.

Additionally we'd like to build the next generation of the discussion template as a list of reusable XPages controls. These custom controls need to be easily reusable so they can be applied to other applications. See [here](#) for an example of a reusable XPages control. These reusable controls can simplify the implementation and maintenance of the discussion template. Below is a list of candidate controls.

The break down of bigger project tasks/areas and the identification of reusable controls is difficult until we've defined what features we want to implement. These lists will be updated frequently based on the features we want to do in certain iterations.

It is difficult to estimate how many people actually want to participate in this project. We hope to have the problem of too many people wanting to participate rather than too few. The Domino developer community is special in that so many have contributed ideas and assets to the benefit of all. The ability to contribute to one of the most widely used templates in the history of Notes and Domino is incentive enough for many. The potential that these contributions may be included in the discussion template shipped with Notes/Domino will be attractive to others. Since we want to be open and fair as to how we'll pick contributors, we will make this process transparent. Here are some draft criteria that will have an impact how we'll pick contributors/committers (details to be done):

- The earlier a contributor contacts us the better
- The more time a contributor can spend the better
- It is highly desirable to have contributors who work on behalf of their employers in this project and their employers are willing to beta test the template
- The more experience with XPages a contributor has the better

We are working out how contributors can be rewarded. In order to use the ALv2 code in an IBM product, we need to put the content from the notice file somewhere so that people can see who

was has contributed. In addition to allowing developers to see who was involved in the development of the template we are evaluating whether the author names can also be mentioned in the about document.

Since we need to wait for the 8.5.1 version of the discussion as starting point and have the Lotusphere 'deadline', there is little time to actually do the coding. We should check whether some work can be done by contributors even before we make the first version of the discussion available as open source. For features like feeds and email notifications it should be possible for people to do this work even before 8.5.1 will be released since only the schema needs to be known.

There is also some legal paperwork that needs to be done (see [here](#)) before people can contribute code. Since this can take some time we'll hopefully find contributors until the mid of August. And additionally it is desirable not only to find the contributors but also to agree on a high level what the contributors want to focus on.

## 2 Work break down

Bigger feature areas that are good candidates for other contributors than Steve and Niklas:

### 1. Profiles

Topic
001: User profiles from other NSFs (Niklas Heidloff 18.06.2009)
002: User profiles from other systems (non NSFs) (Niklas Heidloff 18.06.2009)
003: Hover over user profiles (Niklas Heidloff 18.06.2009)

### 2. Instant messaging

Topic
014: Instant messaging awareness (Niklas Heidloff 18.06.2009)

### 3. Notifications

Topic
007: Configurable notification emails (Niklas Heidloff 29.06.2009)
008: End user triggered email notifications (Niklas Heidloff 29.06.2009)
009: Report topic to moderator (Niklas Heidloff 29.06.2009)

### 4. Feeds

Topic
010: Feeds for change notifications (Niklas Heidloff 29.06.2009)

### 5. Navigator

Topic
019: Hierarchical navigator (Niklas Heidloff 29.06.2009)

### 6. Stylesheets

Topic
020.03: Provide one additional stylesheet (Niklas Heidloff 29.06.2009)

### 7. Embed-able what's new control(s)

Topic
022: Embed-able what's new control(s) (Niklas Heidloff 29.06.2009)

### 8. User interests

Topic
004: More intelligent interest profile preferences (Niklas Heidloff 29.06.2009)
017.01: User interested topics view (Niklas Heidloff 29.06.2009)

[Richer rich client UI ?]

Topic
016: Richer rich client UI (Niklas Heidloff 29.06.2009)
016.01: Actions integrated in rich client (Niklas Heidloff 29.06.2009)
016.02: Drag and drop of attachments (Niklas Heidloff 29.06.2009)
016.03: Add easily Notes documents as topics (Niklas Heidloff 29.06.2009)

[Document file attachments control ?]

[Improved cloud control ?]

### ***3 List of reusable controls***

This document will contain a list of re-usable controls that will be implemented as part of the discussion template. The response documents will contain more details.

These controls should be a little more than custom controls. They need to be easily reusable. See [here](#) for an example of a reusable XPages control.

#### **Candidates**

1. Person control  
- initiate chat, open profile etc.
2. Hierarchical navigator
3. Cloud control
4. Document hierarchy
5. Categorized view
6. Filtered view
7. Document thread
8. Document file attachments
9. User profile
10. User profile viewer