

# Why Groove in Compaq Global Services?



**Compaq Global Services Global KM Team  
Compaq Computer Corporation**

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## Preface

Compaq Global Services has recently been piloting a new technology, called Groove, for team collaboration in the field. The pilot has successfully demonstrated Groove's ability to adapt to the varying, and sometimes difficult, network environments in which Compaq Global Services consultants operate. Now that the pilot is over, the intent is to rollout a large-scale deployment of Groove throughout the organization worldwide.

One of the most frequent questions during the pilot was *why select Groove?* What are the intended uses of Groove? Why was Groove chosen over other knowledge management tools? How does it relate to our existing and planned KM infrastructure (such as Outlook, Inline, and SharePoint)? The purpose of this document is to answer these questions and provide some basic hints and tips for using Groove effectively.

## Revision History

|         |  |
|---------|--|
| Rev 1.0 | Sep 2001. Initial creation.                                |
| Rev 1.1 | Jan 2002. Updated to match new template and update content |

## What is Groove?

Groove is a peer-to-peer collaborative environment developed under the direction of Ray Ozzie, the creator of Lotus Notes. Groove is peer-to-peer in that there is no central server to manage the content — each client machine maintains a copy of the shared space. This allows the members of the space to operate equally well online and offline. It is a collaborative *environment* in that there is no predetermined set of functions within a space — when you create a space you get to choose what “tools” to include based on your particular needs. Of course, Groove provides a set of standard tools to choose from, such as a file directory, threaded discussion, web browser, calendar, and sketchpad. It is also possible to create custom tools using the Groove Development kit (GDK).

Some of the features that make Groove uniquely suited to the Compaq Global Services environment are:

- **Works through Firewalls:** Groove works on almost any internet-accessible machine, through firewalls and proxies. So you can have members both inside the Compaq intranet and outside. You can even include team members on other corporate intranets (i.e. clients and partners). All of the preceding occurs automatically with no manual configuration or adjustment of settings by the user — it simply works.
- **Location Independent:** If you are mobile, Groove can still synch up when you reconnect in a new location, regardless again of proxies, firewalls, ISPs etc.
- **Offline Access:** Groove is peer-to-peer and every team member has a copy of the space. As a result, if you go offline (when you are traveling, say) you can continue to work in the space. Next time you come online, all of your changes will synch up with the other copies of the space. (And vice versa for changes made by others while you were offline.)
- **Security:** Groove is highly secure. All of the data undergoes 192-bit encryption both on the disk and during transmission. So, although it goes through firewalls via port 80, it is encrypted and tunneled through port 80, forming the equivalent of a virtual private network (VPN) between machines.
- **Ease of Use:** Despite all of these features, Groove performs most functions transparently. As a user, all you do is create a space, "invite" the other members (through e-mail or instant message) and Groove does the rest.

Groove has many other features, such as instant messaging, chat, and presence information (i.e. letting you know who's online, who's in which space, etc.) and you as an individual user can create and participate in as many shared spaces as you like.

## Why Groove was Chosen Over Other Technologies

There are a number of knowledge management and team collaboration technologies available on the market. Groove was chosen as the best fit for Compaq Global Services requirements after an evaluation of the competing technologies.

During the evaluation, a number of products surfaced as primary candidates for team collaboration within Compaq Global Services. Many of these products have similar functions (e.g. secure team-oriented spaces containing tools such as file shares, calendars, and threaded discussions). However, they each provide those functions in dramatically different ways, most notably the fact that most are server-based while Groove is a peer-to-peer client application.

Ultimately, Groove was chosen over these other products (including currently deployed solutions such as eRoom) because of its ability to address the requirements of a client-facing service organization such as Compaq Global Services. Specifically, Groove was chosen for primarily **external-facing team collaboration** by Compaq Global Services teams for the following reasons:

- **Offline access:** Groove provides the same capabilities offline as online without user intervention. This is a critical requirement for Compaq Global Services field personnel and is not available from server-based solutions such as eRoom. Groove users have access to all the information they create or receive in the Groove spaces at all times. New information is exchanged when next online.
- **Collaboration without boundaries:** You can collaborate with members of a Groove space from anywhere in the world where you can establish a network connection. LAN, WAN, VPN, ISP, dialup, etc — it does not matter; the only difference is the time it takes to synchronize your spaces. (As with any application the more bandwidth, the faster the synchronization.) Even more important is that you can collaborate across firewalls without any changes to your configuration. Groove seamlessly connects peer members together wherever they are around the world.
- **Security:** Both Groove and eRoom provide password-protected access to team spaces. However, Groove extends this security model to encrypt the contents both on the client system and when content is transmitted across the wire. Secure collaboration with parties outside the corporate firewall has and will become increasingly important to our business success.

Note that our choice of Groove was driven by the unique capabilities that this environment presents to users — capabilities that are simply not available from “classic” server-based collaboration tools. Products such as eRoom, Intraspect, and LiveLink all have significant value in different situations. However, Groove was selected as best suited for addressing the specific requirements of the Compaq Global Services client and partner team collaboration environment worldwide.

## How Groove Fits into the Overall Compaq Global Services Knowledge Management Strategy

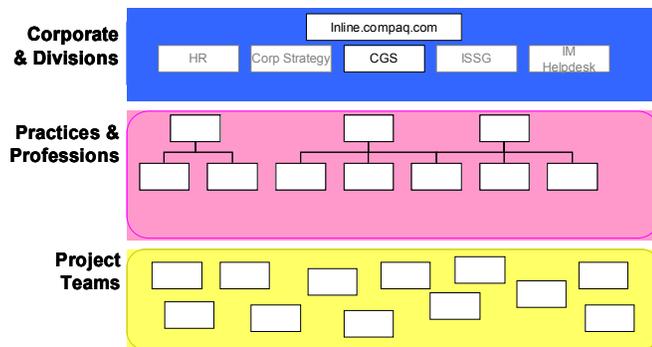
Groove was selected to primarily address the need for external team collaboration within Compaq Global Services, and between Compaq and our customers and partners. Of course, this type of team collaboration is only one piece of the larger knowledge management picture and it is useful to understand how Groove relates to the other components in the system.

It should also be noted at this stage that a second type of team collaboration is also being introduced in the Compaq Global Services organization – Microsoft SharePoint Team Services (STS). Team Services is a Compaq internal only web-based collaboration tool that ensures that enterprise collaboration is readily available to all Global Services personnel by a self-provisioning mechanism. Groove is a P2P deployed solution that requires an approved software request and will *not* automatically be available to all Compaq Global Services personnel. Groove and STS are complimentary tools that are an integral part of the new KM strategy for the business today. For more information refer to the document [“How We Collaborate in Compaq Global Services”](#).

### The Compaq Global Services Knowledge Management Strategy

Compaq Global Services has a three-layer strategy for managing its intellectual property:

- Knowledge about the organization, its structure, business processes, and goals
- Knowledge about the practices and professions, their strategies and tactics
- Knowledge about individual projects and activities



The first layer consists of **Compaq Inline** and existing Compaq Global Services web sites, with plans to incorporate enterprise portal technology (once selected by the corporation) to automate the management and control of divisional web content.

For the second layer, Communities of Practice (CoP) will be developed using Microsoft’s **SharePoint Portal Server (SPS)**. Individual practices and professions will manage their own content directly, allowing for dynamic, secure, and automated delivery of community-specific intellectual property. This is an important step in the fostering of a “knowledge culture” in the corporation; the generation and capture of *structured intellectual capital* that can then be disseminated and re-used by other global community team members is a fundamental factor in our future business success.

At the third layer, **Groove** and **SharePoint Team Services** provide a secure environment for individual teams to collaborate on their tasks. As the work of the team is completed, the output of their efforts is migrated up to the second layer (SPS) for access by the wider audience.

More information about the Compaq Global Services knowledge management strategy is available on the Compaq Global Services KM website.

### **Communities of Interest**

In addition to these three layers — and running through them, tangentially — are the communities of interest that arise around specific technologies, methodologies, skills, and other topics. The primary requirement for these communities is the ability to openly exchange information. In most cases, e-mail distribution lists are used today, although there are significant drawbacks to this strategy.

Consequently, Compaq Global Services has now implemented a worldwide threaded discussion, or forum, tool as a standard mechanism to support communities of interest worldwide. The main forum site can be reached at:

<http://....net/forums/>

### **Teams vs. Communities**

One question that is frequently asked is “how do I decide what tool to use?” At first blush Groove and forum products appear to overlap, since they both include threaded discussion. However, the two types of products address very different collaboration needs of the organization.

**Teams** form around *tasks with clear objectives*, where the goal of the team is to complete the task(s). The team membership is well defined and bounded. The work of the team is private and short-lived (until the task is completed), the team collaboration environment must be available wherever the work is done (on or offline), the environment must include whatever functions are required to complete the task, and the environment must be highly secure (due to the sensitive information it often contains). Although discussion is one of the functions of team collaboration, it is only part of the toolset the team needs. Discussions must be integrated with the scheduling, document review, task management, and other activities needed during a project’s lifecycle.

**Communities** form around a *common interest*. The primary goal of the community is to share information. The community is loosely defined and changes frequently — people come and go as their need for information and their interests change. Communities also have an extended lifespan; they last until interest in the topic wanes. The free flow of information (i.e. discussion) is the primary function of the collaboration environment and the tool acts as a shared memory for the community as a whole.

- **Team collaboration:** secure, bounded (members only), multiple functions integrated into single interface, accessible anywhere.
- **Communities of interest:** open, unbounded (open membership), single primary function (discussion and exchange of information).

Groove was chosen for team collaboration for its secure, flexible and extensible environment that is accessible anywhere — online or offline. The forums are for communities of interest because of their robust support for threaded discussion and ability to integrate into the second layer of the KM infrastructure (i.e. as a “web part” to community portals).

Of course, there will be situations that fall “between the lines” of team and community. Organizational groups are an example, where the team is bounded (by membership in the practice or organizational group), but there is no single task. The general rule of thumb when deciding what technology to use is:

- If the team is *bounded* and their work is *private* to the team, use **Groove** (or SharePoint Team Services for internal-only Compaq collaboration)
- If membership is *open* and there is no common goal, but *a common interest*, use **a community forum**.

## Hints and Tips for Creating Groove Spaces

Groove's primary function is providing secure, shared spaces for collaborating among teams of individuals. The space is the heart of Groove. How you set up and use those spaces will determine how effective your teams will be. The following are some guidelines for configuring Groove spaces for optimal use.

### Before You Start

- ✓ Know your purpose
- ✓ Decide how many spaces you need

#### Know your purpose:

The first step is to make sure that your new space has a clear goal. It is easy to say "I need to collaborate with this group of people." But unless it is clear what the task is that you are collaborating on, the team members will not be driven to participate and the space will fall into disuse.

A common mistake is to create spaces along organizational lines, assuming the team is working on common business goals and therefore will automatically use a shared space to collaborate. However, organizational goals are usually too open-ended to be a focus for active collaboration.

That is not to say that organizational spaces are bad. It means that you need to define clear goals for the use of the space and make sure the participants know what those goals are. Some examples of the types of goals you might have include developing a response to an RFP, reviewing strategy proposals, or developing a solution offering.

A general rule of thumb is: if you cannot articulate specific output from the task (documents, conclusions, or actions), then the goal is not specific enough.

#### Decide how many spaces you need:

In the process of defining the tasks you are working towards, you may find you have more than one goal. If the goals require input from different people, you might choose to create more than one space.

Groove spaces — and the collaboration they support — work best when they have a clear focus. For larger teams working on several related but separate tasks, it might be better to have a space for each task (each with a different set of members, based on their involvement) and then one overall space to manage the entire project (including schedules, assignments, review and approval of final documents, etc.).

### Creating the Space

- ✓ Choose the tools you need
- ✓ Configure the tools
- ✓ Set appropriate permissions and roles

**Choose the tools you need:**

Once you have identified the goal for your collaboration, you are ready to create the space. The next step is choosing the tools you will include in your space.

The tools you use are defined by your purpose. Strategy discussions will require the threaded discussion tool; document reviews usually require the file tool; online meetings may require the calendar and outliner (for agenda and notes).

Things to keep in mind when selecting tools are:

- Only select the tools you really need. Do not clutter up the space with unnecessary tools.
- It is always possible to add new tools in the future if the goal of the space expands over time. You don't need to include everything up front. Start small and build.
- You can include more than one of each tool. For example, you can include two or more threaded discussion tools if there are distinct topics you want to discuss (such as future strategy vs. current issues).
- Select tools based on the functions you need to perform (for example, discussing project status, maintaining a task list, scheduling meetings, etc.)

You can either select the tools individually from the space creation wizard, or you can select one of the predefined tool sets (organized by the type of activity they support). You may find the tool sets easier to use when you are getting started. Try them out — see which ones suit your needs. Remember you can always delete the space and start over before you invite anyone. When you find a tool set that is close to what you need, you can then add or delete the one or two additional tools to make it perfect.

It is strongly recommended that you always include the notepad tool in your space as the first tool. You can use this tool to display a welcome message reminding the participants of the purpose of the space and listing any guidelines for its use.

**Configure the tools:**

Once you have selected the tools and created the space, you should take a few minutes to further configure the tools to meet your needs before inviting any other participants into the space. In particular, you can rename and reorder the tools within the space.

You can rename the tools by right-clicking on their tool tab and selecting “rename tool” from the popup menu. For example, if you have more than one outlining tool, you might rename them “Open Issues” and “Meeting Agenda”.

You can also reorder the tools by clicking and dragging the tool tab to the location you choose. (By default, the tools are in alphabetical order, left-to-right.) Put the tools you expect to be used most frequently to the left, less frequently to the right.

Finally, pre-populate the tools with content to help guide the participants and make the space look inviting. Add any dates that are relevant to the team to the

calendar, if you have one. Post an opening note in the threaded discussion explaining what sorts of topics are expected and any rules about posting or responding. Add two or three related links as favorites in the web browser, if you are including it. Finally, write an introductory note describing the purpose of the space and any guidelines for usage in the notepad tool, rename the tool to something descriptive, such as “Welcome” or “Intro”, and drag it to the first position on the left.

**Set appropriate permissions and roles:**

Groove let's you assign three different roles to members of a space: Manager, participant, or guest. You can then define permissions on a tool-by-tool basis based on these roles. (You access the permissions for individual tools by right-clicking the tool tab and selecting “permissions...” from the pop-up menu. You access space-wide permissions by selecting “Shared space permissions” from the Options menu.)

By default, the creator of the space is a manager and invitees are participants. Things you should think about are:

- Unless you have a very small, trusted team, it is best to turn *off* the default permission allowing participants to create and delete tools from this space. It is very easy to accidentally add new tools (especially for new users of Groove). Usually this function should be reserved for managers.
- You may also want to turn *off* the default permission allowing participants to invite additional members into the space.
- If you use the notepad tool as an introductory message, be sure to change the permissions on that tool to only allow managers to edit the content. (By default participants can as well.)
- Be sure to invite at least one other member in as a manager, so they can act as facilitator when you are unavailable. This also provides a failsafe in case your system fails and you must rebuild. Having a second manager lets them invite you back in as a manager once your system is recovered.

**Inviting your Team Members**

- You are now ready to invite your team members into your space. Send them their invitations, making sure to assign them the appropriate role (manager, participant, or guest). Where possible, send the invitation by instant message, since this is the most secure mechanism. If not, send the invitation by email. Then sit back and collaborate!

## Groove Do's and Don'ts

Like any technology, Groove has the opportunity to be used and abused. The following are some basic do's and don'ts for using Groove effectively.

- **Don't** post invitations to spaces to distribution lists, file shares, or web sites. Groove is a focused collaboration tool for specific team-members – not a general discussion forum. This more general capability will be provided through a different KM toolset in the future.
- **Don't** create larger Groove spaces than necessary – remember that every content item will automatically be replicated on all other members in your space. Ask yourself the question: Is it the right forum for what you are trying to do?
- **Do** be sensitive to the file sizes you are sharing with your peers – perhaps larger files can be compressed, zipped, or stored externally and referenced by a URL.
- **Don't** try to undertake Groove synchronization over dial-up connections after being offline for a long period of time (more than one-to-two weeks) unless you (a) think you have time to do so and (b) will not be attached to a broadband connection of some form in a reasonable timeframe.
- **Do** try to use Groove regularly – at least once per day. Only by being a regular user, will you (a) get into the habit of using the tool and migrate large content sharing from e-mail, etc, and (b) not miss important information being posted by your fellow Groovers. If you do not activate Groove for a prolonged period, your shared space membership will be suspended and you will require a fellow team-member to re-invite you back into the space.
- **Do** delete your Groove spaces after you are finished with them. The Groove space creator is ultimately responsible for deletion of the space.
- **Do** copy/migrate any valuable content that could benefit or assist the wider Compaq Compaq Global Services community from your Groove spaces at regular intervals or prior to deleting a Groove space. Do share helpful knowledge to others.
- **Do** think of ways that this revolutionary technology can be used in new ways to improve how we use our business. How can Groove allow us to better work within Compaq, with our partners and with our customers?

## Groove FAQs

**Q. Who can use Groove?**

**A.** Anyone can use Groove. However, use of Groove within the corporation is managed through enterprise licenses. Compaq Global Services is currently using a limited number of pilot licenses and intends to purchase licenses for the majority of its field personnel over time. Those licenses will be assigned on an as needed basis. Organizations outside of Compaq Global Services will need to purchase their own licenses.

**Q. What if I have the Preview Edition? Can I use that for collaborating within Compaq Global Services?**

**A.** Although it is technically feasible to use the preview edition, we strongly encourage you **not** to use it for business purposes. The licensed edition contains additional functionality that is important to Compaq Global Services (such as enhanced roles and permissions within spaces). More importantly, as a customer and partner of Groove, we need to abide by their licensing agreements.

**Q. How many spaces can I create?**

**A.** There is no limit to the number of spaces you can create or be a member of. Clearly, for your own sanity, you will want to keep the number down so you do not get confused about which space is for what purpose (just like mail folders). It is a good idea to “clean house” and delete spaces once you are done with them, to avoid their clogging up your system.

**Q. What kind of information can I put into a Groove space?**

**A.** The type of information you store in a Groove space depends on what “tools” the space includes. There are separate tools for web links, calendar entries, threaded discussions, and other content. There is also a generic file tool for storing any type of file.

**Q. Where is the Groove server?**

**A.** Unlike traditional server-based systems, Groove is a peer-to-peer application. There is no central server for storing the content. There are servers within the Groove environment. However, these “relay” servers are present to facilitate communication between the clients, not to store data.

**Q. If there is no server, where are the contents of my space stored?**

**A.** The contents of the space are stored on your PC, as well as on the PCs of each of the other space members. Everybody who is a member of a space has a copy of that space on their machine.

**Q. What if my PC dies, how do I get my Groove spaces back?**

**A.** If your system dies and you do not have a backup to restore, what you need to do after you rebuild your system is get a new Groove license, reinstall Groove, then ask the other members of the spaces you were in to invite you back into

the spaces. Remember, each of the members of the space have a copy, so the content is secure even if your machine fails.

**Q. How do I “backup” or “archive” a space?**

**A.** There is no automated way to backup individual spaces within Groove. When work on a space is complete, the team leader should post the resulting output of the project (documents, reports, or whatever) to a repository such as a SharePoint portal, Exchange public folder, or Intranet web site for wider accessibility. Groove may provide a global “export” facility in the future. In the meantime, if you really wish to archive a space you can do the following:

1. Create a directory on your system
2. Open the Groove space
3. Drag and drop files from the file tool into the directory
4. Export any other tool contents to the directory as XML
5. Zip the contents of the directory and store in a secure location

Not all tools support export, but the principle tools (including threaded discussion and calendar) support exporting their contents as XML (see Export... on the File menu). You can then import the resulting XML file into a new space if you wish to recover the contents.

**Q. Can I move the Groove data directories to a different device?**

**A.** Today, you cannot move the Groove data directories. (This may change in the future.) Your spaces are stored along with the Groove program directories. Since the space required to store your spaces will increase over time, we recommend you install the Groove application on a disk that has sufficient capacity for growth (this is done during the installation process).

**Q. Can I use Groove on more than one computer? If so, do I need a license for each machine?**

**A.** Yes, you can use Groove on multiple computers. No, you only need one license. The way to use Groove on multiple computers is to set up Groove on one computer, export your “identity” to a file, install Groove on the second computer, then rather than adding a license, you inject your identity (i.e. the file you exported in the previous step) into the second machine. See “Use Groove on multiple machines” on the Groove transceiver home page for more information.

**Q. How do I find out what spaces are out there?**

**A.** Unless you are invited into a space, there is no way of knowing that the space exists. Unlike forums or other public spaces, Groove is intended for secure communication among a defined group of people. Nonmembers are not aware of its presence. If you believe there is a space that you ought to be a member of, contact an existing member (preferably the creator of the space) and ask to join.

**Q. Can I invite clients and third-parties into Compaq spaces?**

- A.** Yes, one of the major advantages of Groove is the ability to create secure shared spaces among individuals regardless of intranet firewalls, proxies, or geographic location. Note, however, it is your responsibility as a member of the space to ensure that no Compaq proprietary information is disseminated through this space and you should not discuss proprietary information in such a space unless the client or third-party is under NDA. It is a good idea to include a note in the introduction to the space reminding all participants that it is an extranet space.
- Q. Who pays for a client's license to use Groove?**
- A.** If clients already have Groove licenses, they can use their existing licenses to participate in your spaces. If not, it is possible to assign them one of the Compaq Global Services licenses. The process for requesting license's for clients has not been defined yet and will obviously need to balance the goal of improving collaboration with the client against the cost of the license and the potential business that the customer could generate.
- Q. What if I can't get funding support for Client Groove Licenses?**
- A.** For simple or short-term collaboration needs the 3<sup>rd</sup> party can download and install Groove Preview Edition. It should be noted that Preview Edition features are anticipated to become much more restrictive in future releases, and additionally you will need to create 'Preview Edition compatible' spaces for this to correctly work. Once again, Compaq personnel should not use Preview Edition but a fully licensed Enterprise Edition client.
- Q. When should I use Groove messaging and when should I use Microsoft Messenger, AIM, or other instant messaging applications?**
- A.** Groove has instant messaging as a standard feature. You are welcome to use it to communicate with other Groove users. Not everyone will have Groove, so it is best to use Groove messaging for communication between members of a space rather than as a general messaging system. In the future, we expect Groove messaging to be able to interoperate with other messaging systems as a standard around IM emerges.
- Q. Where can I get training on Groove?**
- A.** Groove is a very intuitive application and does not require much training to use. However, Groove does provide online training for the general public through its website (<http://www.groove.net/training/>). They can also arrange online or onsite training for specific customers (such as Compaq Global Services). Finally, documentation and a self-paced online tutorial are available from they support site. (<http://www.groove.net/support/>).
- Q. Where can I find out more about Groove?**
- A.** The best source of information about Groove is Groove itself. Help about the application and about the individual tools within it is available from the help menu in the Transceiver. A very handy two-page quick start guide is also available. Finally, for technical information about how Groove works, there are a number of white papers and presentations available from the Groove developers' zone (<http://devzone.groove.net/library/>).