

CLOUD COMPUTING
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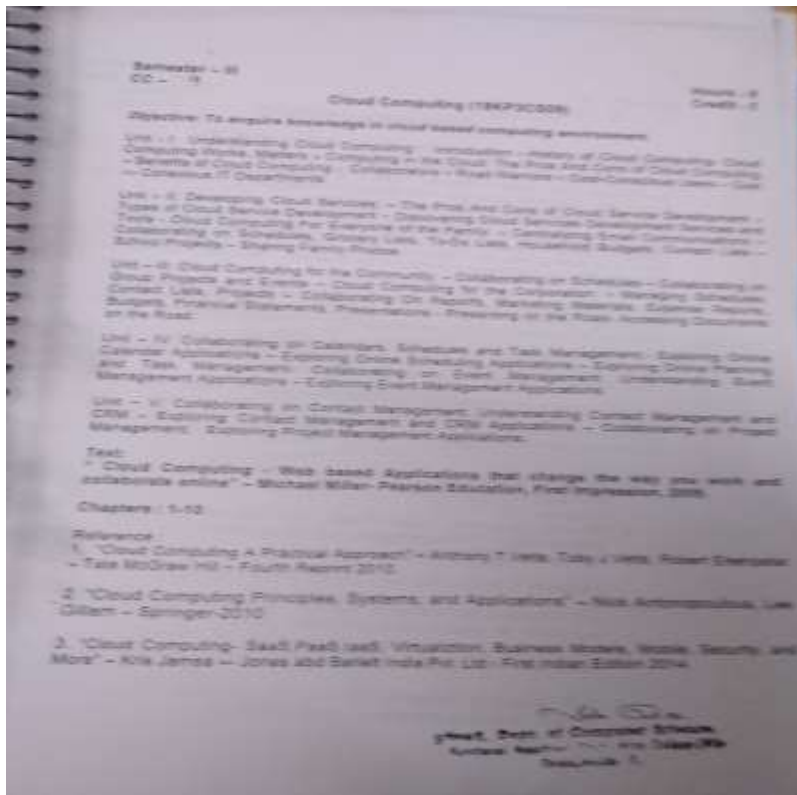
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Unit III

Chapter :5

Cloud Computing for the Community

Cloud computing isn't just for home users. It has tremendous benefits for the entire community, from neighborhood groups to sports teams to school organizations. Any time any group of people in the community need to communicate and collaborate, web-based applications are the way to go.

I. Communicating Across the Community

- Alliteration aside, one of the key components of any community collaboration is communication. This isn't as easy as it sounds, because many community activities are undertaken by people in their spare time—outside of normal work and home activities.
- Therefore, they might be communicating during office hours on their work computer, after hours on their home computer, or during any spare moment wherever they may happen to be. That makes using traditional desktop email, such as Microsoft Outlook or Windows Mail, problematic.
- The better solution when communication on community issues is to use a web-based email program, such as Gmail (mail.google.com), Microsoft Windows Live Hotmail (mail.live.com), or Yahoo! Mail (mail.yahoo.com).
- These programs can be accessed from any computer connected to the Internet. You use your web browser to send and view email messages hosted on the web. You can send and receive messages at work, at home. Everything you send and receive is stored in the cloud, accessible from anywhere at any time.

Collaborating on Schedules

When it comes to coordinating multiple individuals or families in a community activity, whether it's a youth sports team, community organization, school event, or some community event, trying to line up who's free and who's not on a given evening takes a lot of effort—unless, that is, you're using web-based scheduling tools.

Sports Team Schedules

- Here's one of the most common community activities: youth sports. Maybe your son is on an intramural football team, or your daughter is into youth soccer.
- Whatever the age, whatever the sport, there's a lot of activities that need to be scheduled—practices, home games, away games, team meetings, you name it. Multiply the number of players (and coaches) on each team times the number of events, and you see the complexity; it gets even worse if you're trying to manage events for an entire league.
- The best way is to use a web-based calendar tool, such as Google Calendar (calendar.google.com), Yahoo! Calendar (calendar.yahoo.com), or CalendarHub (www.calendarhub.com). Just create a public calendar and pro-

vide the URL to all the team members.

- Also good are dedicated sports team website builders. These sites offer tools designed specifically for sports teams, including home pages complete with schedule, roster, player profiles, box scores, and the like.
- There are several of these web-based applications, including eteemz (www.eteemz.com), League Athletics (www.leagueathletics.com), LeagueLineup (www.leaguelineup.com), and TeamSnap (www.teamsnap.com).

School Schedules

- Web-based calendars are also ideal for keeping track of various school schedules. Whether it's homework assignments for a particular class or a school-wide events schedule, it's easy for a teacher or school to post that schedule on a web-based calendar.
- Make the calendar public (but make sure only authorized personnel can post new events), and then provide the calendar's URL to all students and parents.

Community Group Schedules

- Any community group can benefit from organizing their activities via a web-based calendar.
- Any and all of these group activities can easily be managed online, in the cloud, using a web-based calendar.

Event Schedules and Management

- You can also use web-based calendars to post dates and schedules for specific public events, such as school plays, or for all events in a given community.
- Although any web-based calendar program can do this job, as well, some event-specific applications are worth noting.

Collaborating on Group Projects and Events

- Community groups often have a lot on their plates. Someone has to schedule the next fundraiser, someone else needs to print up flyers, someone else is in charge of recruiting new members there's just a lot of stuff to do!

Collaborating on To-Do Lists

- Let's start with simple task management, in the form of the old-fashioned to-do list. These are web-based lists that multiple group members can access from any web browser.
- Some of the more popular online to-do list applications include Bla-Bla List (www.blablalist.com), Remember the Milk (www.rememberthemilk.com), Ta-da List (www.tadalist.com), Tudu List (www.tudulist.com), and Voo2Do (www.voo2do.com).

Collaborating on Task Management

- For managing more complex tasks, a simple to-do list application might not cut the mustard. Instead, consider using a web-based task management application that lets

you manage the multiple pieces and parts of large projects.

- Basic task management can be accomplished with applications such as HiTask (www.hitask.com) and Zoho Planner (planner.zoho.com). For the most complicated projects, consider using a dedicated project management application, such as Basecamp (www.basecamphq.com) or Goplan (www.goplan.com).
- Group members can then access the application online from their own computers and update the project with their own individual progress.

Collaborating on Event Management

- Not only do you have to manage the tasks involved with putting together the event, you also have to handle attendee registration, event marketing, ticket sales, and the like. It's a massive effort made somewhat easier by web-based event management tools.
- With web-based event management applications, the cloud hosts everything you need to schedule and market your events, as well as handle registration, payment, and other important tasks.
- For example, you can create an online event calendar so that attendees can learn about and sign up for future events via the web; offer web-based event registration and payment; manage requests for hotel rooms, airline flights, and car rentals; and check in attendees live onsite via a notebook PC with Internet connection.
- These are very robust applications, capable of handling every last detail over the web. Some of the most popular of these apps include Cvent (www.cvent.com), RegOnline (www.regonline.com), and ViewCentral (www.rmkr.com/viewcentral).

Collaborating on Event Marketing

- We briefly mentioned event marketing in the previous section. That's because most event management applications also handle basic event marketing.
- But when it comes to promoting your community events, you want to go beyond the basics to more creative forms of marketing. For example, you may want to create a brochure or flyer to announce your event.
- Fine and dandy, but everybody in the group (including all the community bigwigs) wants input on the final piece. This may have been difficult in pre cloud days, but now you can use a web-based application such as Google Docs (docs.google.com) to create your piece and make it available online for every- one to see and comment on.
- Naturally, you can also use web-based local search sites, such as Zvents (www.zvents.com), to post announcements of your community events. You may even want to use cloud-based social media sites, such as Facebook and MySpace, to promote your event online.
- And, after the event, you can post pictures of the event on community photo-sharing sites, such as Flickr (www.flickr.com). It's all possible because of the cloud!

Collaborating on Budgets

- Every event, small or large, comes with its own set of costs. And with community events, those costs are often managed by a group of people, each responsible for a specific

operation or group of operations.

II Cloud Computing for the Corporation

Businesses have been some of the earlier adopters of cloud computing. Companies large and small recognize the cost savings and Productivity enhancements of using web-based tools to manage projects, collaborate on documents and presentations, manage Enterprise wide contacts and schedules, and the like. Cloud computing lets companies do more with limited budgets.

- In addition, web-based applications have proven a boon for telecommuters and road warriors. Instead of being tied to documents and applications hosted on their office desk-tops, workers can now access what they need from any location—in the office, at home, or on the road.

Managing Schedules

- If you work in a large company, you know what a hassle it is to schedule even simple meetings. One person is free on Tuesday at 9:00, but another is out of the office, and yet other attendee is already booked for that time slot. Plus, you're not even sure which meeting room is free at that time.
- That better way is web-based scheduling. Everyone places his or her schedule in the cloud, which then enables the meeting's organizer to easily see who's available when.
- The cloud-based app finds the best time for all involved and schedules the meeting. No more emails, no more phone calls; it all happens automatically, in the cloud.
- Let's suppose you need to schedule a meeting sometime next week with a dozen different attendees. You punch in the details of the meeting and the desired attendees, and the scheduling app finds the first available timeslot when all attendees are free.
- Alternatively, the app might have to pick a timeslot when the maximum number of people can attend. This kind of "best case scenario" scheduling might be the only way to get your meeting on the calendar in a reasonable period of time.
- Web-based scheduling programs let you schedule both in-person meetings and teleconferences with attendees from multiple locations.
- Of course, much of this can be accomplished with simple web-based calendar programs, such as Google Calendar (calendar.google.com) and Yahoo! Calendar (calendar.yahoo.com).
- To take advantage of the more advanced automatic scheduling features, however, you need to use an industrial strength scheduling application, such as AppointmentQuest (www.appointmentquest.com), hitAppoint (www.hitappoint.com), and Schedulebook (www.schedulebook.com).

Managing Contact Lists

- Salespeople have to deal with lots and lots of contacts. Not only is their address book full, they need to know when to contact certain clients, when follow-up calls are necessary, what the boss needs them to do today, and the like. This is difficult

to do from a simple desktop contact management program, such as Microsoft Outlook, which merely acts as a storehouse for names and contact info. It's also difficult to do when you're on the road and need access to all your contacts.

- The solution, of course, is a web-based contact management or customer resource management (CRM) application. These programs are tailored to the needs of a busy salesperson and come complete with features such as activity scheduling, appointment reminders, email templates, and the like.
- Among the most popular of these applications are BigContacts (www.bigcontacts.com), Highrise (www.highrisehq.com), and the market-leading Salesforce.com (www.salesforce.com).
- Using a web-based contact or CRM application can be as simple or as complex as you make it. You might need nothing more than access to a large list of contacts from any location; that's the simple usage.
- Imagine the typical day on the road for a traveling salesperson. You wake up in your hotel room, turn on your notebook computer, and log in to the hotel's free wireless Internet connection.
- Using your web browser, you access the CRM application's website and look at today's list of tasks. You click a button to launch a list of scheduled emails to be sent to selected clients, and then scroll through the list of phone calls you need to make today.
- Everything you've entered about that client is stored online and instantly accessible. You can even click a link to view driving directions and a map to the first client you need to visit. And, to see how you're doing against this month's quota, you end the session by creating a detailed sales tracking report.

Managing Projects

- Most companies at one point or another have at least one big project going on—the type of project that involves multiple employees from multiple departments and perhaps multiple locations.
- Projects of this type have tons of individual pieces and parts, each of which dependent on the completion of a previous task. Keeping track of all the individual tasks—who's doing what and when—can take a gargantuan effort.
- Project members can log in from any location to access the project's master file; they can add or delete tasks, mark tasks as complete, enter detailed billing information for individual tasks, and so forth.
- And because the project is hosted in the cloud, every team member sees the same Gantt or PERT chart and the same list of tasks, instantly updated when any other member makes an edit.
- Many project management applications include additional functions useful in the management of group projects. These features may include group to-do lists, web-based file sharing, message boards, time and cost tracking, and so on.

- And the most robust of these apps lets you manage multiple projects simultaneously; users can schedule their time across multiple projects and make sure they're not doing two things at once.
- The most popular of these apps include AceProject (www.aceproject.com), Basecamp (www.basecamp.com), onProject (www.onproject.com), and Project Insight (www.projectinsight.com).

Collaborating on Reports

- When you work for a larger enterprise, chances are you get to write a lot of reports—and these days, the reports you write are often in collaboration with one or more other employees.
- For example, you may need to put together a monthly progress report that includes input from the company's marketing, sales, and finance departments. Or perhaps you're preparing a business plan that includes sections from all the company's departments, or a company overview that includes bits and pieces from each and every office location.
- Fortunately, online collaboration is one of the chief benefits of cloud computing. Instead of emailing Microsoft Word documents across the company, opt instead for a web-based word processing program, such as Google Docs (docs.google.com) or Zoho Writer (writer.zoho.com).
- The best web-based word processors work in conjunction with full-fledged web-based office suites. Google Docs, for example, encompasses word processing, spreadsheet, and presentation functions.
- Zoho's suite of apps includes similar word processing, spreadsheet, and presentation functions—as well as a neat little project management module.
- Collaborating on a web-based document is surprisingly easy. Most projects start with the team leader creating a new document online and giving it a bit of form—some sort of content and style template.
- The leader then assigns sections of the report to appropriate individuals, and provides the document URL to each individual. These contributors then work on their own sections of the report, logging in to the master document via their web browsers
- Most online word processing applications let you embed photos and other graphics; you may also be able to include spreadsheet files as part of the master document.

Collaborating on Marketing Materials

- Marketing is another area that benefits from cloud-enabled collaboration. Putting together a catalog requires data from several different departments. For example, effective direct mail campaign benefits from marketing, sales, and fulfillment input. Online PR needs participation from marketing, product, and technical staff.

- When it comes to creating marketing materials, perhaps the best approach is to use a combination of web-based applications. Naturally, web-based email facilitates communication between departments; you can also benefit from web-based project management apps, to help keep all the pieces and parts in line.
- The marketing materials themselves can be created using web-based word processing applications. This puts the draft materials on the web, for everyone on the team (including appropriate senior management) to see, comment on, and even contribute to.

Collaborating on Expense Reports

- If you spend your company's money, you have to account for it. That's the theory behind the reality of expense reports, the bane of all free-spending employees. It's not too difficult to create an expense report using your favorite spreadsheet software, but that isn't always the best way to go.
- The paper or electronic report must then wend its way through your company's various levels of approval: your boss, your boss' boss, the accounting department, the HR department, and who knows how many more people before the accounting folks finally cut you a check.
- A better solution for many companies is to put the expense reporting function on the web. Employees from any location can access the website to enter their expenses; it can even be accessed while employees are still traveling, with no need to wait for reimbursement until they get home.
- Then the web-based expense report gets electronically circulated to everyone who needs to approve it or, more likely, a link to the web-based report is emailed instead. Finally, after the last approval is entered (electronically, of course), the accounting department is notified and a check is cut.
- Another benefit of web-based expense management is that you can quickly and easily ensure that all employees follow your company's rules and regulations.
- Some of the most popular enterprise-level web-based expense reporting applications include Concur (www.concur.com), ExpensAble (www.expensable.com), ExpensePoint (www.expensepoint.com), and TimeConsultant (www.timeconsultant.com).

Collaborating on Budgets

- While we're on the topic of money, there's no bigger project at many companies than creating next year's budget. Every department is involved, with managers required to submit complete department budgets (the creation of which involves several departmental employees) that are then rolled up by the finance department into a complete company budget.

- That budget is seldom approved as is, of course, which means adjustments are then rolled back down the line; the departments make the required changes and resubmit their budgets, which are then rolled back up again to the final company budget.
- Traditionally, each department works on its own budget spreadsheet, which is then emailed to the finance department for consolidation with those of other departments.
- Cloud computing offers a better approach. Instead of working on separate spreadsheets that are later consolidated, you can use a web-based application to create a single budget document for all departments on the web.
- Each department head enters his own budget data. The rolled-up budget is then created in real-time. When the big bosses need to slash certain expenditures, those changes are immediately reflected in the sections or pages for each individual department.
- This type of online budgeting can be accomplished with a simple web-based spreadsheet, such as Google Spreadsheets (spreadsheets.google.com) or with a dedicated enterprise-level budgeting application, such as Host Budget (www.hostanalytics.com/budgeting-planning-software.html). In addition many office management and project management applications include budgeting modules, so that may be an option for your particular firm.

Collaborating on Financial Statements

- Assembling a monthly or year-end profit-and-loss statement or income statement is like a budget, but from the other side—that is, it requires input from all departments, but it measures what actually happened rather than making a projection.
- Given the fast-paced nature of financial reporting these days, the accounting department needs final figures from all relevant department as soon as possible after month-end or year-end close.
- Instead of waiting for each department to mail or email its results, the entire process is accelerated when each department enters its data directly into a master spreadsheet. Because this spreadsheet is housed on the web, even departments in remote locations can have their data recognized as soon as they enter it.
- Although you could use a web-based spreadsheet program, such as Google Spreadsheets, for this task, a better approach might be to invest in a web-based accounting program. For example, Host Consolidator (www.hostanalytics.com/consolidation-reporting.html) bills itself as a web-based financial consolidation, analysis, and reporting application.
- Authorized individuals can enter appropriate data from any location, using any

web browser. Once month-end or year-end data has been entered, the application automatically generates a variety of financial reports, including balance sheet, income statement, cash flow statement, and the like.

Collaborating on Presentations

- Every company today sees more than its fair share of PowerPoint presentations. Then you need to put together a snazzy presentation—and show it from your laptop.
- The problem with producing a large presentation is that you often need input from more than one person, department, or office. If you're presenting company financials, for example, you need to get those from each individual department. If you're presenting to your sales force, you might need to assemble product information from multiple divisions. If you're giving an HR presentation, you may require input from the managers of all of your company's physical locations.
- As with most collaborations of this type, a collaborative presentation is problematic. Let's face it, it's just plain difficult to get everyone involved to submit work on time—and in the proper format. Anyone in charge of such a project has probably already gone bald from tearing his hair out.
- The most-used web-based presentation program today is Google Presentations, part of the Google Docs suite (docs.google.com). This application includes a lot of PowerPoint-like features, and can even import and export files in PowerPoint's format. Other online presentation programs include Preezo (www.preezo.com) and Zoho Show (show.zoho.com).

Presenting on the Road

- Here's an added benefit in presenting from the cloud: You can give your presentation anywhere without taking it with you. That's right, you don't have to bother loading a huge PowerPoint file onto your notebook PC's hard disk.
- Instead, when you get to your destination, connect your notebook to the Internet, open your web-based presentation, and give that presentation in real time to your local audience. In fact, you don't even have to take your notebook with you. You can use any computer at the host location to access and launch your presentation.
- Even better, many web-based presentation programs let you give your presentation without even being there! That's right, you can give a remote presentation—at multiple locations at the same time—by having all participants log in to the same web-based spreadsheet. Make sure they have read-only access, dial everyone into a conference call (so that you can provide the audio walk-through), and then go into presentation mode. All attendees at all locations will see the same presentation, and you don't even have to buy a plane ticket.
- Then you have web-based applications such as Cisco's WebEx

(www.webex.com) and Microsoft Office Live Meeting (office.microsoft.com/en-us/livemeeting/).

- These are hosted applications that let you stage live meetings and presentations—called *web conferences*—over the Internet.

Accessing Documents on the Road

- While we're talking about using web-based applications on the road, remember that any application or document housed in the cloud is accessible from wherever you may be.
- All you need is a computer (and it doesn't even have to be your computer) and Internet access. Log in to the appropriate site, enter your username and password, and then open whatever document you need.
- You can even print your documents remotely, if your computer is connected to a printer or you have access to a hotel or conference hall business center.
- This is one of the great things about cloud computing; it doesn't matter where you are. You can be in the office, at a trade show, or visiting a client in another city, and you always have access to the same applications and documents.
- You don't have to worry about taking the right copy of a document with you, or making sure you have a compatible version of the software program loaded on your notebook PC.

Unit IV

Chapter : 7

Collaborating on Calendars, Schedules, and Task Management

- This section of the book takes a look at different types of personal and business computing tasks, and at the web-based applications that can facilitate those tasks. Think of this section as a giant catalog of the best of what cloud computing has to offer: Whatever type of application you're looking for, chances are there's something in the cloud that will do the job for you.
- We start our examination of these cloud services with applications that help you get organized—calendars, schedulers, planners, and task management tools.

Exploring Online Calendar Applications

- Most computer users today have embraced keeping their schedules on their PCs. Not that the old-fashioned wall-hanging calendar is dead, it's just that it's a whole lot easier to track appointments and events electronically; the computer does all the busywork for you.
- That's why, instead of using a calendar that's wedded to a single computer, many users are moving to web-based calendars. A web-based calendar Service stores your calendars on the Internet,
- where they can be accessed from any computer that has an Internet connection. This lets you check your schedule when you're on the road, even if your assistant in the office or your spouse at home has added new appointments since you left.
- As to favorites, I admit to being a longtime user of Google Calendar; it does everything I need it to do.
- That said, Yahoo! Calendar does pretty much every- thing Google Calendar does, and should be another favorite, especially among non-business users.
- Then there's Apple's new MobileMe Calendar, which is already attracting a lot of attention; it should be considered by any- one also looking at the Google and Yahoo! applications.

Google Calendar

- The most popular web-based calendar today, no doubt due to its association with the web's most-used search engine, is Google Calendar (calendar.google.com). Google Calendar is free, full featured, and easy to use. It lets you create both personal and shared calendars, which makes it ideal for tracking business group, 2. family, and 3. community schedules.

- Google Calendar looks pretty much like every other calendar you've ever seen. You enter your appointments (which Google calls "events") directly into the calendar, which you can display in either 1.daily, 2.weekly, or monthly views. can also, if you like, view your weekly agenda on a single page.
- Like all web-based calendars, all your events are stored in the cloud (in this case, the cloud created by Google's own network of servers), not on your own computer. This means that you can access your calendar from any computer anywhere in the world. Just log in to the Google Calendar page and your calendar and all events are there.
- Because Google Calendar is web based, you can use it to create not only a private calendar for yourself, but also public calendars for your company or organization.
- Create a public calendar and all employees or attendees can access it via the web. In addition, special event invitation features make it easy to invite others to an event public or private.

What types of calendars can you create with Google Calendar? Here's the list:

- **Personal calendars**, like your default calendar
 - **Public calendars**, which others can access via the web
 - **Friends' calendars**, which you import from their Google Calendar web pages
 - **Holiday calendars**, which add national holidays to a basic calendar

Setting up a new calendar is comically easy

- In fact, there's nothing to set up. When you first sign into the Google Calendar page, your calendar is already there, waiting for your input. There's nothing to create, nothing to configure.
- And here's something unique about Google Calendar. Because it's part of the mighty Google empire, Google Calendar integrates smoothly with Google's Gmail application.
- Google Calendar can scan your email messages for dates and times and, with a few clicks of your mouse, create events based on the content of your Gmail messages.

Yahoo! Calendar

- One of Google Calendar's primary competitors is Yahoo! Calendar

(calendar.yahoo.com), hosted by its search competitor Yahoo!

- This web-based calendar looks, feels, and functions quite similarly to Google Calendar, and is also free for anyone to use.
- Yahoo! Calendar's similarity to Google Calendar and To be honest, most web-based calendars have a similar visual look. One subtle difference in Yahoo! Calendar, however, is the presence of an Add Task button. This reflects Yahoo! Calendar's offering of tasks in addition to events.
- Of course, you can share your Yahoo! calendars with other users, in a collaborative environment. Just click the Sharing link and indicate how you want to share—no sharing, view-only for friends, view-only for anyone, or view-only with special friends allowed to edit
- At present, Yahoo! Calendar only lets you create a single calendar. All your events, public and private, have to be stored on this calendar.

Windows Live Calendar

- Because Google and Yahoo! both offer web-based calendars, it's no surprise that the third-largest search site also has a competitive offering. Windows Live Calendar (mail.live.com/mail/calendar.aspx) is Microsoft's web-based calendar, actually part of the Windows Live Hotmail email service.
- Windows Live Calendar looks a lot like both of its primary competitors. It offers tasks, like Yahoo! Calendar, and also lets you schedule meetings with other calendar and Hotmail users. Naturally, you can share your calendars with authorized users for group collaboration.

Apple MobileMe Calendar

- Apple's MobileMe (www.me.com) is a new competitor in the web-based apps market. It includes online mail, contacts, and calendar, as well as an online photo gallery and file storage.
- The MobileMe Calendar is, of course, a web-based calendar that can be accessed from any computer connected to the Internet, Mac or Windows. What makes it more unique and potentially more useful is that it can also be accessed from Apple's iPhone, which makes it a truly mobile calendar.
- As with competing calendars, you can display MobileMe in Daily , weekly, or monthly modes.
- And, as you can see in Figure 4, MobileMe lets you create multiple calendars and display them all on the same screen, using different colors for each calendar.

- Even though MobileMe Calendar doesn't offer much new or innovative (save for the iPhone interoperability, of course), it's bound to be a strong competitor in the online apps market, especially for non-business users.

AOL Calendar

- America Online isn't quite the powerhouse that it used to be, but it still has millions of users, both paid subscribers and free web users.
- Any registered user can access AOL Calendar (calendar.aol.com), which integrates with the AOL Instant Messenger (AIM) service for both
 1. instant messaging
 2. email.
- As with competing calendars, AOL Calendar lets you share calendars with authorized users; your calendars can be either private or public.

CalendarHub

- Beyond Google, Yahoo!, Apple, and their ilk, many independent sites offer full-featured web-based calendars. Perhaps the most notable of these is CalendarHub (www.calendarhub.com), shown in Figure 5.
- CalendarHub offers all the features found in the previously discussed web-based calendars—
 1. Private/public calendars,
 2. Sharing/collaboration,
 3. Multiple calendars,
 4. Task-based to-do lists,
- CalendarHub lets you publish calendars on your blog or website, which makes it great for creating sites for community groups, sports teams, and the like.
- Other users can sign up to receive email notification of new events, or subscribe to RSS feeds for any calendar view. And, of course, it's completely free.

Hunt Calendars

- Hunt Calendars (www.huntcal.com) offers event-based web calendars. Useful features include
 1. Email reminders,
 2. Notification of event conflicts,
 3. Notification of new and updated events,
- The site lets you add web links and images to calendar events, which is fairly

unique. Also nice is the ability to customize the

1. Color scheme
 2. Graphics to reflect your organization's look and feel, as illustrated in Figure 6. This makes Hunt Calendars particularly attractive to
1. Businesses
 2. Community groups.

Famundo

- If you keep the schedule for a community group, check out Famundo (www.famundo.com). This site offers Famundo for Organizations, a free web-based calendar ideal for schools, churches, sports teams, and the like. (Figure 7 shows a typical school calendar, with different colors used for different types of events.)
- After the public calendar has been created, users can subscribe to be notified of new and upcoming events. You can also add
 1. Message boards,
 2. Blogs, features to your calendar.

The company also offers Famundo for Families, a personal version of their Organizations calendar. This version includes a family address book and message board, to facilitate family communication.

eStudio Calendar

- eStudio Calendar (www.same-page.com/calendar-software.html) is designed specifically for business use. You get three types of calendars in a single interface:
 - **Member Event** calendar helps users manage their personal time,
 - keep track of meetings with others,
 - **Team Event** calendar is used to schedule activities for a group, as well as schedule facilities.
 - **Supervisor** calendar provides reports to managers about business activities schedules.

30Boxes

- The name of 30Boxes (www.30boxes.com) refers to the 30 “boxes” displayed on a typical monthly calendar. The site itself offers a slick interface for adding events, as you can see in Figure 8. All your events can be shared with other designated users, plus you get to-do lists, a link to Google's Gmail, and similar

useful features.

Trumba

- Trumba (www.trumba.com) offers web-based calendars ideal for community organizations, schools, and similar public entities.
- Calendars Net (www.calendars.net) is a free web-based calendar designed for companies or individuals who want to add interactive calendars to their web- sites. A typical calendar fits into a frame on your website, with little coding required.
- The site also hosts personal calendars in the cloud. You can employ four different levels of security (so that different users can view the calendar), add events, edit events, and even change universal calendar settings.

Jotlet

- Here's another way to add web-based calendar functionality to your website. Jotlet (www.jotlet.net) is a JavaScript API and library that you can use to build rich calendar functionality into any web page.
- If you're skilled in HTML programming, this is a good way to build a calendar-based page. The Jotlet API is free for noncommercial use, and also available (for a fee) for commercial sites.

Exploring Online Scheduling Applications

- As anyone in a large office knows, scheduling a meeting can be a frustrating experience. Not only do you have to clear time from all the attendees' individual schedules, you also have to make sure that the right-sized meeting room is available at the designated time.
- Experts claim that it takes seven emails or voice mails to arrange a single meeting; a typical businessperson can spend more than 100 hours each year just scheduling meetings.
- Enter, then, the online scheduling application. This web-based app takes much of the pain out of scheduling meetings, for both large and small groups. The typical app requires all users to enter their individual calendars before- hand.
- When you schedule a meeting, the app checks attendees' schedules for the first available free time for all. The app then generates automated email messages to inform attendees of the meeting request (and the designated time), followed by automatic confirmation emails when attendees accept the invitation.
- Professionals who schedule appointments with their clients—doctors, lawyers, hairdressers, and the like—face similar scheduling challenges. For this purpose,

separate web-based appointment scheduling applications exist.

Jiffle

- Let's start by looking at web-based solutions for meeting scheduling. Our first app is Jiffle (www.jiffle.com), which schedules meetings, appointments, and the like for the enterprise environment. To track employees' free time, it synchronizes seamlessly with both Microsoft Outlook and Google Calendar. It also offers its own Jiffle Calendar application.
- These attendees view the invitation, log in to the Jiffle website, and then select their preferred time slots from the ones proposed. Based on these responses, Jiffle picks the best time for the meeting and notifies all attendees via an automatic confirmation email.

Presdo

- For smaller companies, Jiffle is free for up to 10 meeting confirmations per month. For larger companies, Jiffle Plus, Jiffle Pro, and Jiffle Corporate plans are available.
- Unlike Jiffle, Presdo (www.presdo.com) is a scheduling tool that isn't limited to a single company. Presdo lets you schedule meetings and events with anyone who has an email address.

Diarised

- Diarised (www.diarised.com) is, like Presdo, a web-based meeting maker that users across different companies can use. It helps you pick the best time for a meeting by sending out emails to invitees, letting them choose the best times for them, and then sending you a summary of those best dates. You pick the final date, Diarised notifies everyone via email, and your meeting is scheduled.

Windows Live Events

- Event scheduling is now part of Microsoft's bag of tricks. Microsoft's Windows Live Events (home.services.spaces.live.com/events/) is a customized version of its Live Spaces offering; it lets Live Spaces users organize events and share activities between participants.
- To schedule an event, you set up a list of invitees and then send out a mass email with a link back to your Live Event site. (All the event details are also available as an RSS feed.) Information about the event is posted on the site itself, which also serves as a place for attendees to come back after the event and share their

photos, videos, and blog posts about the event.

- With its user-friendly consumer features, Live Events isn't robust enough (or professional enough) for most business users. It is, however, a nice way to plan more personal and informal events.

Schedulebook

- Schedulebook (www.schedulebook.com) offers several different types of web-based scheduling services. Depending on the application, you can use Schedulebook to schedule employees, customers, or other interested parties.

The company's three offerings are

- **Schedulebook Professionals**, which is a business-schedule/calendar/planning application
- **Schedulebook Office**, which schedules the use of any shared resource, such as company meeting rooms or even vacation homes
- **Schedulebook Aviation**, which is used by the aviation industry to schedule aircraft, flight training, and similar services

Acuity Scheduling

- If you run a business that requires scheduling appointments with clients or customers, Acuity Scheduling (www.acuityscheduling.com) can help ease your scheduling operations. Acuity Scheduling lets you clients schedule their own appointments 24/7 via a web-based interface.

AppointmentQuest

- Like Acuity Scheduling, AppointmentQuest (www.appointmentquest.com) is designed to solve the scheduling problems of busy professionals. This application not only enables clients to make and you to accept appointments over the web, it also lets you manage personnel, schedules, and other calendar-related items.

hitAppoint

- Our last scheduling application, hitAppoint (www.hitappoint.com), also enables online client booking. Like the previous similar application, it's ideal for any business that requires the making of customer appointments—barber-shops, hair salons, doctor and dentist offices, consultants, financial advisors, car repair shops, computer technicians, and the like.

Exploring Online Planning and Task Management

- Now let's pivot from schedules to tasks. Planning and task applications let you manage everything from simple to-do lists to complex group tasks, all over the Internet and collaboratively with other users.

iPrioritize

- Sharing to-do lists is important for families, community groups, and businesses. Your to-do list might be as simple as a grocery list or as complex as a list of activities for a community program or business project. Whatever the application, iPrioritize (www.iprioritize.com) is a good basic to-do list manager.
- As you can see in Figure 13, authorized users can create a new to-do list, add items to the list, prioritize tasks by dragging them up and down the list, and mark items complete when finished. And, because it's web based, you can access your lists anytime and anywhere.
- When you have a list, you can print it out, email it to someone else, subscribe to changes in the list via RSS, and even view lists on your mobile phone—which is a great way to consult your grocery list when at the supermarket!

Bla-Bla List

- Bla-Bla List (www.blablalist.com) is another simple to-do list manager. It's web based, of course, so you can access your lists from any location at any time.

Hiveminder

- Hiveminder (www.hiveminder.com) is similar to all the previously discussed to-do list managers. What's nice about Hiveminder is that you can enter list items in a kind of freeform fashion, and it will help you create and prioritize lists based on your "brain dumps."

Remember the Milk

- When you need to "remember the milk" at the grocery store, check out the aptly named Remember the Milk (www.rememberthemilk.com) web-based to-do list manager. Once you create a list, you can arrange reminders via email, instant messaging, or text messages to your mobile phone.

Ta-da List

- Here's another web-based to-do list manager. Ta-da List (www.tadalist.com) lets you

make all sorts of lists, share them with friends, family, and coworkers, and then check off items as they're completed.

Tudu List

- Tudu List (www.tudulist.com) is a little different from other to-do list managers in that it also includes a web-based calendar. Items are added both to the appropriate to-do list and to your calendar, on the date they're due.

TaskTHIS

- TaskTHIS (taskthis.darthapo.com) is similar to most other to-do list managers, but offers the ability to add extended notes to any individual task. You can publish your tasks via RSS or share with others via the web.

Vitalist

- Like other to-do list managers, Vitalist (www.vitalist.com) organizes all sorts of tasks and projects. It's unique in that it uses the Getting Things Done (GTD) workflow methodology popularized by management consultant David Allen.

TracksLife

- Trackslife (www.trackslife.com) is a database-oriented task manager. Each "track" is a separate database that combines columns of money, numbers, words, paragraphs, and yes/no responses. The application sends out reminders of critical events via email or RSS.

Voo2Do

- Voo2Do (www.voo2do.com) moves beyond simple to-do list management into more sophisticated priority management. This web-based application lets you set up different projects, organize tasks by project, track time spent and remaining on a given task or project, publish task lists, and even add tasks via email.

Zoho Planner

- Zoho Planner (planner.zoho.com) is perhaps the most sophisticated task planner evaluated here. Its features and functionality approach those of the project management applications we discuss in Chapter 10, "Collaborating on Project Management."

Chapter 8

Collaborating on Event Management

Scheduling a company meeting is one thing; putting together a large-scale event, such as a conference or seminar or trade show, is quite another. An undertaking of this scale involves more than just clearing a few schedules and making sure the conference room is free at 10 a.m. on Friday. A big event is a big project with lots of individual tasks.

To stage a successful event, you have to market it to potential attendees, sign up those attendees, process their fee payments, make sure that the event space and conference rooms are properly scheduled, handle travel and hotel arrangements, register attendees when they arrive onsite, manage event workers, and make sure everything runs on time during the event. It's a tremendous undertaking.

It's not surprising, therefore, that several companies have introduced web-based event management applications. What's nice about hosting these apps in the cloud is that you can work on the same master database whether you're in your office before the event or sitting at the registration desk during the event.

Understanding Event Management Applications

- What exactly does an event management application manage? Less- sophisticated apps may focus on one or two operations, such as event registration or facilities booking. The more full-featured apps include management of everything from pre-event marketing to post-event analysis.

Event Planning and Workflow Management

- A successful event starts well in advance of its opening date. There are tons of details involved in an event of any size, and managing all those tasks takes quite a bit of computing horsepower—just the thing cloud computing can help you out with. Most event management applications include robust task planning modules, similar to what you'd find in higher-end task management applications or lower-end project management apps.
- What you want is the ability not just to track individual tasks in a to-do list fashion, but also benefit from sophisticated workflow management. That is, you need to know which tasks need to be completed before later tasks can be started; you need to know who's doing what, and be alerted to any tasks that are unstaffed

or understaffed.

Event Marketing

- Unless you let people know about your event, you could be disappointed with the final attendance. To that end, many event management applications include modules to help you market your event.
- For example, many apps offer web-based email marketing, which lets you promote your event via targeted email messages. Other apps help you create your own event website (on their cloud computers), which also helps to promote your event.

Event Calendar

- Another part of your event marketing mix is an event calendar—an online calendar that displays all the happenings within your overall event. This proves particularly useful if you're hosting a conference or trade show made of lots of individual panels, sessions, or meetings. You can post each individual event on the main event calendar, easily accessed by any attendee or potential attendee with a web browser.

Facilities Scheduling

- Unless you're running a one-room meeting, chances are your event involves multiple rooms and maybe event multiple locations. If so, you need to be able to schedule different rooms for different components of your event; when a participant or group asks for a room, you need to be able to see what's available and when.

Advance Registration

- Most larger events require or encourage advance registration of participants. To that end, most event management apps include a web-based registration module, where attendees can sign up (and, in most cases, pay) for the event. Attendee information is entered into a web form, and that data is then stored on the application provider's cloud servers. You then access attendee data from your own computer, wherever you may be.
- The registration module is the backbone of the entire event management program. Make sure it does everything you need it to do, and does so in a way that you find usable.

Payment Processing

- Collecting payment for your advance and onsite registrants is a key part of the event management experience. You want the event management software to tie payment processing into the registration process, letting you accept payment

via credit card, PayPal, or whatever other payment methods you accept.

Travel Management

- If you're running a real "hands-on" event, you might want to consider offering travel services to select attendees. This may be as simple as arranging ground transfer services (taxis, buses, and so on) between your local airport and the event hotel, or as advanced as linking into an online travel site or air-line reservations system to provide flight reservations

Housing Management

- More common is a housing management module that helps match event attendees with available rooms at your event hotel. Many attendees prefer to have the event host handle their hotel reservations, so that you serve as kind of a "one-stop shop" for all your attendees needs.

Onsite Registration

- Your attendees sign up (and probably pay) for your event in advance. But when they arrive on opening day, you need to sign them in, print out badges, provide a welcoming packet, and so forth. All of these tasks are managed by the event management application's onsite registration module. Ideal onsite registration ties into the advance registration and, optionally, the housing management modules of the application.

Contact Management

- Here's a service that many event managers offer attendees. Using the master database of event guests, you can provide contact management services to help attendees get in touch with one another. At the very least, your event management application should let you print out (or host online) a master directory of attendees, which can then be provided as part of the welcoming packet of materials.

Budget Management

- Running an event is an expensive and complex undertaking; your overall budget includes hundreds of individual expense items. To that end, your event management application should include a robust accounting or budget management module, to track both your expenses and your income.

Post-Event Reporting and Analysis

- When the event is (finally!) over, your job isn't quite done yet. Not only do you have to balance the books, you also need to look back on the entire event

and determine how successful it was. That's why most event management applications include some form of post-event reporting and analysis. Some apps even let you send and process attendee surveys, which can provide valuable feedback from those who were there

Exploring Event Management Applications

- Now that you know what to look for in an event management application, let's look at the most popular of these web-based apps. Whereas most perform similar functions, some stand out from the pack in terms of what they do—or don't—offer.

123 Signup

- Taking these event management applications in alphanumeric order, the first out of the gate is 123 Signup (www.123signup.com). The company offers four different applications: Event Manager, Association Manager, Training Manager, and Member Directory. Of these, the one in which we're interested is the aptly named Event Manager.
- 123 Event Manager is scalable, so it can be used for both smaller (employee meetings, stockholder meetings, alumni meetings, and so forth) and larger (trade shows, fundraisers, conferences, and so on) events.
- The application handles a combination of front-office and back-office tasks. Front-office tasks include defining and marketing events, automatically generating informational web pages and registration forms, and marketing your event via targeted email messages.
- Back-office tasks include event registration, badge printing, payment collection, and database management. The program even provides real-time reports on registrations, attendance, collections, and other key factors.
- Potential attendees see information about the event, including a link to a map of the event hotel and the ability to add the event to their Microsoft Outlook calendar. To begin the registration process, an attendee need only click the Register icon; attendees are then prompted for their name and contact info, as well as payment method.

Acteva

- Acteva (www.acteva.com) offers online event registration and payments. Using Acteva's web-based solutions, you can handle event registration, ticketing, and payment handling (via any major credit card) directly from your own website. You can then sort and manage all event registration data

online.

- You start by creating what Acteva calls an Active Page for your event; this is simply a web page with built-in payment handling and data processing. (You create your Active Page by filling in a few web forms—it's quite easy.) After you've published your event page, you then use Acteva's EventMail service to send out notification of your event to potential attendees.
- Interested parties then visit your Active Page to register and pay for the event. Acteva processes and confirms event registration and sends an email confirmation to the participant. You can then use Acteva's online event management tools to generate will call lists, meal preference lists, name tags, badges, and the like.

Conference.com

- Conference.com (www.conference.com) offers one of the most full-featured web-based event management applications available today. By using Conference.com's cloud servers, even small events can utilize the company's powerful event management tools, designed to serve the needs of the largest events. Your data (and the behind-the-scenes application modules) are hosted by Conference.com's secure servers, accessible from any Internet-enabled location.
- The company offers a wealth of features for events big and small. You get wizard-based event setup, real-time credit authorization, customizable web pages and forms, onsite processing, and the like. When an event participant submits his registration via your custom-designed web form, the application automatically updates the database on Conference.com's web servers, so your information is always up-to-date.

These modules include the following:

- **Appointment Manager**, an online meeting scheduling application.
This module enables attendees to self-schedule one-to-one sessions with other participants at your event, within time slots that you predefine.
- **Credit Card Manager**, offering real-time credit card authorization integrated into the registration process.
- **Email Manager**, an email broadcasting utility that dynamically pulls recipient names from your registration data.

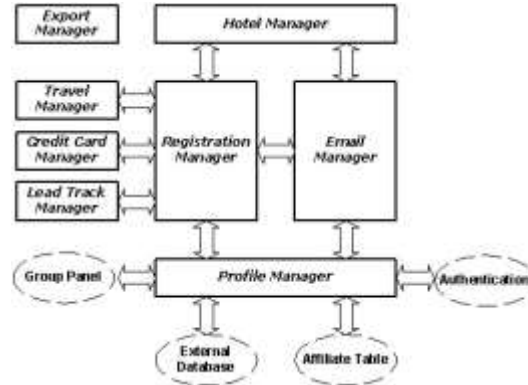


Figure: Conference.com's interlocking event management modules.

- **Export Manager**, an export/import utility that lets you copy the data from one event to another event in your database.
- **Hotel Manager**, a professional room block management tool tightly integrated with the company's Registration Manager module. The system manages everything from small single property blocks to citywide room inventories. Each room type is defined with its own price, description, and starting inventory; as a room is sold, the nightly inventory for that room type is automatically adjusted.
- **Lead Track Manager** uses bar code technology to verify session attendance and provide lead tracking services to exhibitors.
- **Profile Manager** links member, employee, customer, and prospect databases with your conference registration processing, enabling attendees to authenticate themselves through a login web page.
- **Registration Manager** is the core module of Conference.com's Event Manager systems. This module contains the accounting engine, report engine, a graphical report library, and other functions that integrate directly with other modules in the suite.
- **Survey Manager** enables you to create professional-looking online surveys at any point in the event process. You can solicit pre- or post-event attendee surveys; Survey Manager lets you email invitations with hyperlinks that take the user to the correct survey form.

- **Travel Manager**, which helps you manage ground transfer services between multiple airports and event hotels.

Cvent

Competing directly with Conference.com is Cvent (www.cvent.com), with its Event Management system. Like Conference.com, Cvent's Event Management system is a suite of interrelated tools, including the following:

- **Event Registration**, including online event registration, branded event websites, data collection, and generation of name badges and mailing labels
- **Email Marketing**, with automated invitations, “save-the-date” reminders, confirmations, and post-event “thank you” messages
- **Secure Online Payment Processing**, which lets you accept payment by all major credit cards—and offer “early-bird” discounts to motivated participants.
- **On-Site Functionality**, which enables you to check in attendees as they arrive onsite, provide self-registration kiosks, print session- attendee lists, create bar-coded name badges, and process live credit card payments
- **Event Reporting**, which lets you access event data in real-time via a library of standard and custom reports
- **Housing and Travel Management**, which provides a one-step process for attendees to sign up, pay, get a hotel room, reserve an airline flight, and receive all relevant follow-up communications
- **Contact Management**, which creates a professional directory or address book from all entered participant information
- **Budget Management**, which helps you build, track, and analyze budgets for your events
- **Custom Event Websites**, which helps you launch a custom website for your event—complete with onsite promotion of event sponsors
- **Event Workflow Management**, which helps you manage the entire event planning process from start to finish, complete with to-do list emails for event staff
- **Event Calendar**, a web-based calendar that displays all events open for registration

Event Wax

- Event Wax (www.eventwax.com) isn't quite as full featured as other event management solutions discussed in this chapter. In fact, it really isn't designed to handle large-scale events such as trade shows and conferences. Instead, Event Wax is for smaller-scale in-house events, such as company meetings, parties, open houses, and the like.

eventsbot

- Our next event management application is eventsbot (www.eventsbot.com), which offers online event registration and ticketing. You can use eventsbot to plan and manage your event, sell tickets in your choice of currency, collect credit card payments, and even promote your event with major search engines and event directories.
- Creating a new event with eventsbot is as easy as filling in a few web forms. This creates a cloud-based website for your event, like the one shown in Figure 8.4. You can then activate ticket selling for the event, which takes place on this web page. After that, eventsbot handles ticket and attendee management for your event.

RegOnline

- Like eventsbot, RegOnline (www.regonline.com) offers online event registration and payment. You use RegOnline to create a website for your event, create web-based registration forms, accept credit card payments, send automatic email reminders and confirmations, print name badges and room signs, and generate all manner of custom reports.
- Application also handles the reservations of individual hotel rooms and room blocks. Figure 8.5 shows how easy it is to get started with RegOnline. This event builder page walks you through the event creation process via a series of web forms. Fill in the relevant information to generate a web page and other functions for your event.

Setdot

- (www.setdot.com) isn't really for large corporate events; it's more of a stylish web-based way to schedule and manage smaller personal events and activities. Setdot lets use choose from various preset themes for your event web page. It even displays maps and directions to events. And, although it's mainly for smaller events, it does manage guest responses and messages.

Tendenci

- Here's another unique approach to event management. Tendenci (www.tendenci.com) combines a web-based calendar application with online registration and payment. You create an event calendar, like the one in Figure 8.6, which you embed in your own website. When an interested party clicks an event link, he's taken to a dedicated page for that event, where he can see more information and register online. You can then manage the attendee data, print name tags, and the like.

Unit V

Chapter 9

Collaborating on Contact Management

Most technically adept people today keep their lists of friends, family, and business contacts in some sort of computer-based address book. Maybe it's in the Windows Address Book, maybe it's in Microsoft Outlook, but it's likely that you have all your contacts in some electronic file someplace on your computer.

The problem with that, of course, is what to do when you need to look up an address or phone number and you're not around that particular computer. Maybe you need a phone number for a family member and you're at work, or maybe you need the address for a business colleague and you're at home. You get the idea. Storing your contacts in the cloud would let you access all your contact information from any computer, anywhere.

The situation becomes more acute when your job depends on your contacts, as is the case with salespeople. We're talking customer relationship management (CRM) here, and it's no good to have all your contact information stored on your work computer when you're always on the road. CRM is an ideal application for cloud computing, as witnessed by the large number of firms offering web-based CRM

Understanding Contact Management and CRM

- Everything we discuss in this chapter is based on the concept of contact management. Whether we're presenting simple address book–based applications or sophisticated sales automation programs, it all comes down to how the application uses the information you provide about a person—which is, in essence, contact management.

All About Contact Management

- Contact management is the act of storing information about friends, family, and business colleagues for easy retrieval at a later date. We're talking names, street addresses, email addresses, phone numbers, and the like, stored in some sort of computer file.
- Simple computer-based contact management takes the form of an electronic address book, like the Address Book application built in to Microsoft Windows. Applications like Address Book store this contact information on a single computer, where it can easily be recalled and utilized. These programs often

inter- face with your email program, for easy insertion of email addresses.

- That said, contact management can be more involved and more useful than simple name/address storage. More sophisticated contact management applications help you track all sorts of details about your friends and colleagues, from personal info (birth date, spouse's name, children's names, favorite restaurants, and the like) to business info (employer, department, job responsibilities, and so forth).
- Web-based contact management applications enable you to access your contact information from any computer connected to the Internet. Instead of storing personal contacts on your home PC and work contacts on your office computer, you store all your contacts in the cloud, where they can be accessed from both home and work.

All About CRM

- Many businesses require more practical use of their contact information. It's not enough to have the equivalent of a digital Rolodex on hand; that contact information can be injected into various automated processes to help establish and maintain lasting and productive relationships with the company's customers.
- This process of managing the needs, wants, and buying patterns of customers is referred to as customer relationship management. CRM helps companies understand and anticipate the needs of current and potential customers; it's an essential tool for building strong customer relationships.
- CRM software not only stores customer contact information, it also stores and analyzes all data relating to a particular customer, and then uses that data to help you determine how best to relate with that customer.
- When CRM is used by sales staff, you get a subset of CRM called sales force automation, or SFA. SFA applications perform all the customer-centric tasks expected of CRM apps, but with a sales-specific approach. For example, you may use SFA software to track when to make follow-up sales calls or to provide additional information to key prospects.
- CRM and SFA applications have been around for decades, almost as long as we've had personal computers. Only recently, however, have these two applications moved into the cloud.

Exploring Contact Management and CRM Applications

The line between contact management, CRM, and SFA applications is blurry enough to make clear distinctions impossible. To that end, we'll look at all three types of applications in one long list—starting with the industry-leading Salesforce.com, and proceeding in alphabetic order from there.

Salesforce.com

The most popular web-based contact management/CRM available today is offered by Salesforce.com (www.salesforce.com). In fact, the company offers several different cloud services:

- **Salesforce.com**, a software-as-a-service CRM application designed for sales, marketing, customer service, and other uses
- **Force.com**, a platform-as-a-service application designed for developers who want to design or customize their own sales force apps
- **AppExchange**, an online marketplace of add-on software for Salesforce.com, developed by independent companies

All these cloud services are buttressed by a robust community and support structure, including blogs, forums, education and training initiatives, and the like.

- The company's primary application is the self-named Salesforce.com. The company offers a hosted collection of on-demand business applications that include the following:
 - **Sales Force Automation**, which includes activity management, channel and territory management, forecasting, mobile access, email templates, and real-time analytics that help companies increase sales productivity and grow revenues
 - **Service & Support**, a customer service solution for enterprise call centers
 - **Partners**, a partner relationship management application that enables collaboration and partnership with channel partners
 - **Marketing**, which includes tools to execute, manage, and analyze the results of multichannel marketing campaigns

- **Content**, which enables companies to share documents and other content across the organization
 - **Ideas**, which helps a company build online communities with their customers, partners, and employees
 - **Analytics**, which offers real-time reporting, calculations, and dashboards to help improve decision making and resource allocation

- Salesforce offers so many useful applications it's difficult to provide a quick overview, but as an example of the types of applications provided, let's take a quick look at the Activity Management component of the Sales Force Automation module.
 - The specific applications offered in this component include activity tracking and collaboration (to track tasks and activities, schedule joint meetings, and set up automatic templates for recurring tasks), activity scheduling (including the ability to publish calendars for shared resources and set appointment reminders), sales activity reports, and team management functions (assigning and managing a team for large accounts, with specific roles for each team member).
 - Most Salesforce tasks can be managed via the use of customized dashboards. Each dashboard presents a visual display of key sales metrics. You can create your own custom dashboards to measure those activities of most importance to your company or department.
 - As you can no doubt gather, Salesforce has applications for companies of any size and type. Pricing is customized for each account, typically costed by number of users and applications used.

bConnections

- As popular as Salesforce.com is, it isn't the only web-based CRM solution available today. Witness bConnections (www.bconnections.com), a contact management program augmented with essential CRM functions for small and medium-sized businesses.
- The bConnections application starts with a list of companies you do business with, and a list of contacts at those businesses. The application includes a web-based calendar that sales management can use to manage the activities of all their reps. It also tracks leads and sales

opportunities, to help you better prepare sales forecasts. All activities are summarized in the application's Executive Summary dashboard.

BigContacts

- BigContacts (www.bigcontacts.com) is a web-based contact manager designed for workgroups as small as 2 people or as large as 2,000. It features an address book, group calendar, task manager, and to-do lists. Its CRM functions include sales tracking, activity reports, team management, and mobile access. Pricing is on a per-user basis.

eStudio Contact Manager

- For more basic contact management, check out eStudio Contact Manager (www.same-page.com/contact-management.html). This application is an online address book specifically designed for business contacts. The address book can be accessed by multiple users from any Internet-connected computer, making it ideal for real-time contact management for sales teams, project groups, and small businesses.

Highrise

- Highrise (www.highrisehq.com) is a very sophisticated contact management application. Each contact record can include basic info (name, address, email, and so on), as well as notes, file attachments, images, links to audio and video files, emails, and so on. You can even add tasks you need to get done (call, email, send a thank-you note, and so on) regarding this person; these tasks show up in the individual's contact page as well as in your master to-do list.

Apple MobileMe Contacts

- MobileMe Contacts (www.me.com) is a straight ahead contact management app with no CRM pretensions. It's essentially an address book stored in Apple's cloud that remains in sync with whatever device you use to access it. It also synchronizes with the contact information in Apple's Address Book and Microsoft's Outlook, Outlook Express, and Windows Contacts programs. Also neat is its integration with Google Maps, which is used to map locations and provide directions.
 - For millions of iPhone users, MobileMe Contacts will automatically be the contact management application of choice. But here's the thing—it's also a worthy application if you don't have an iPhone; its jazzy interface and synchronization features make it a strong contender for

regular PC users, as well.

MyEvents

- MyEvents (www.myevents.com) is a combination contact manager, web calendar, task manager, and online community builder. You store all your contacts online, where you can access them via any web browser or wireless device.
- The calendar function is ideal for both personal and group events, via shared public calendars. Plus you get online file storage and sharing, online digital photo albums, hosted web pages, and community bulletin boards and chat rooms.

Plaxo

- Plaxo (www.plaxo.com) is an odd little beast. At its heart, it's an online address book, with contact information stored in the clouds and accessible from any Internet-connected computer. But it's also been accused of being spy-ware (because its Outlook plug-in is installed automatically when you install various partner software, most notably AOL Instant Messenger).
- Plaxo's status as cloud service comes from the hosting of contact information on the company's servers, and the automatic sending of invitations to all contacts in a user's email address book.
- More recently, Plaxo has altered its offerings to include more social networking types of functionality, as well as a web-based calendar. The company was also acquired by Comcast, which intends to use Plaxo to drive its SmartZone communications hub.

People Matrix

- People Matrix (www.wolfereiter.com/PeopleMatrix.aspx) is a web-based contact management application tweaked for human resources use. In addition to basic contact management, it includes job applicant data, and lets users send mass emailings about job postings and the like.

PipelineDeals

- PipelineDeals (www.pipelinedeals.com) offers an easy-to-use web-based CRM solution. The application lets you track contacts, leads, milestones, deal status, and other key data. As the name implies, PipelineDeals is deal focused. You attach all data and accompanying files (Word documents,

Excel spreadsheets, and so on) to a specific page for each current or pending deal.

- One of the key reporting features in PipelineDeals is the Deal Home Page, a dashboard that provides a quick snapshot of deal status and upcoming activities. Events and activities also display on the program's integrated web calendar.

SalesBoom

SalesBoom (www.salesboom.com) provides web-based CRM and back-office solutions, with different editions for different-sized businesses:

- **Enterprise Edition**, for larger organizations. Includes inventory management, product management, accounting, and human resources management solutions.
- **Professional Edition**, for medium-sized businesses. Includes marketing automation, sales force automation, and customer service and support solutions.
- **Team Edition**, for small businesses. Includes sales force automation, contact management, and customer service and support solutions.

All of SalesBoom's sales force automation solutions include lead management, contact management, account management, opportunity management, and forecasting features. The Enterprise Edition also includes quote management, contract management, commissions management, and a product database.

SalesJunction.com

- SalesJunction.com (www.salesjunction.com) offers a web-based CRM and SFA contact management system, priced on a per-user basis. Unique features include management of service cases, mass email sales campaigns, and sales pipelines.
- The company's Pro Edition also includes territory management

functionality, which lets companies set up, assign, and work leads by territories. Individual users can be assigned to multiple territories, and managers can be assigned to manage as many territories as you like.

SalesNexus

- Web-based contact management software is what SalesNexus (www.salesnexus.com) offers. It was designed from the ground up around the needs of salespeople, sales management, and marketing professionals.
- SalesNexus features include the ability to create and store proposals, estimates, quotes, and sales sheets; customized sales pipeline and activity reporting; management of automated email marketing campaigns; and automatic lead creation from website forms. In addition, SalesNexus can capture and report the source of website leads.
- The SalesNexus contact database cleanly interfaces with your company's email system, so that all inbound and outgoing emails between a contact and anyone in your organization are automatically attached to the contact's record.
- The application also includes support for mobile phone and handheld digital devices, and syncs with Microsoft Outlook contacts, calendars, and tasks.

Zoho CRM

- Our final contact management/CRM application is Zoho CRM, available in three different editions: Free Edition (for up to three users), Professional Edition, and Enterprise Edition. The application includes the following modules:
 - **Sales & Marketing**, which integrates sales with campaigns, leads, sales pipeline, and forecasts
 - **Inventory Management**, which provides a complete integrated inventory management system
 - **Customer Support & Service**, which employs cases and solutions to integrate the customer

support process with sales data

- **Reports & Dashboards**, which help you analyze sales and marketing trends and key metrics
- The application also includes an Outlook plug-in that enables you to synchro- nize your Zoho CRM contacts, tasks, calendar, and emails with Microsoft Outlook.
- Zoho’s Sales & Marketing component is a full-fledged CRM/SFA application. It includes lead management, opportunity management, account management, contact management, activity management, sales management, and sales quotas functions.

Chapter 10

Collaborating on Project Management

- Managing a large project can be an exhaustive task. Even the smallest project has numerous pieces and parts, all of which have to be completed in a precise order and on an exacting timetable for the project to come in on time and on budget. If just one piece slips, the whole project goes out of whack.
- The process of managing a project gets even more complex when the participants are in different locations.
- Although you can’t always turn a nightmare into a dream project, cloud computing can help alleviate the night sweats associated with this sort of complex project management. When you employ a web-based project management application, you can more easily manage all the pieces and parts, no matter where the players are located.

Understanding Project Management

- Put simply, project management is the act of planning, organizing, and man- aging resources to bring about the successful completion of specific project objectives. The project itself can be anything, from creating a product brochure to implementing a new hiring process to launching a new product line. What all projects have in common, however, is that they’re finite endeavors—every project has a specific start and completion date. And it’s to this latter date that you must manage.
- The challenge, of course, is completing the project by the assigned date—and to the agreed-upon budget. Key to this is the tight management of each and task

that comprises the project; if all the component tasks are completed on time and on budget, the entire project will be completed as planned. If one or more tasks slip—and you can't make up the lost time elsewhere—your project will come in late.

- To manage the individual tasks within a project requires managing a larger set of resources—people, of course, but also money, materials, space, communications, and the like. This resource management is crucial to ensuring the eventual success of a project.
- Project management professionals like to think in terms of juggling a certain set of constraints: scope (what must be done to produce the end result), time (the amount of time available to complete the project), and cost (the budgeted amount available for the project). These constraints are interrelated; one constraint can't be changed without impacting the others.
- For example, if you increase the scope of a project, you typically need to increase the time and cost, too. If you want to reduce the time to complete the project, you might need to increase the costs (pay more to get it done faster) or reduce the scope (try to accomplish less things on a tighter schedule).
 - The key to effective project management is to use all available tools and techniques that enable the project team to organize their work to meet these constraints. And, not surprisingly, one such tool is a web-based project management application.

Exploring Project Management Applications

- Traditional project management software helps project managers and team members organize and track all the various tasks in a project. To do this, the software typically includes scheduling, budget management, and resource-allocation components. Web-based project management applications do all this online, with a centralized project file accessible to all team members. This enables improved communication and collaboration between members of the project team.
- The scheduling component of a project management application helps the project manager schedule the series of events that comprise the total project. This should include a list of dependencies—those events that need to be completed before other events can start. The project management application should then be able to calculate the project's critical path, which is the series of events that determine the length of the entire project.
- After the project has been planned, it then has to be executed. The project

management application should enable this execution by creating task lists for team members, allocation schedules for project resources, overview information for the team manager, and, as the project progresses, an early warning of any risks to the project's completion.

- All that said, most web-based project management applications work in a similar fashion. Let's examine some of the most popular of these cloud services.

@task

- The web-based project management program known as @task (www.attask.com) offers a variety of traditional projection management functions. The application includes an interactive drag-and-drop Gantt chart critical path analysis, project milestones, planned/projected/ estimated comparisons, resource scheduling, issue management, and calendar views for project tasks. Tasks can even be managed remotely via a special software widget for Apple's iPhone.

AceProject

- AceProject (www.aceproject.com) is an easy-to-use web-based project management application. It lets users manage multiple projects using multiple resources and share those resources across projects. Tasks can be tracked via a variety of filters that fine-tune the results, and the application offers a number of different project reports and statistics.

Basecamp

- One of the most popular project management applications today is Basecamp (www.basecamphq.com). Its web-based nature makes it viable for both internal and external (client) projects.
- In addition to standard project management operations such as time tracking and milestones, Basecamp includes to-do lists, file sharing, message boards, wiki-like web-based documents, and other group collaboration features. All web-based pages created by the program can be fully customized.
- One of the aspects of Basecamp that makes it so appealing is its price. The company offers three different plans (Basic, Plus, and Max), priced from a flat \$24/month to \$149/month. This is in contrast to similar applications that price on a per-user basis. Basecamp's flat pricing makes it easy for organizations of any size to pick the plan that's right for them, based on the number of concurrent projects and storage space needed.

Copper Project

- Copper Project (www.copperproject.com) is a project management application that can be hosted either on the company's servers or on your own server. Either version enables web-based collaboration.
- Copper includes useful features such as a drag-and-drop weekly or monthly timeline, resource management, email alerts, statistical reports, and a unique personal time management tool. The program's Springboard view lets you see the progress of multiple projects on a single screen; you can drill down from there by client or project.

eStudio TaskTracker

- TaskTracker from eStudio (www.same-page.com/online-project-management-07.html) is an easy-to-use online project management application. This program includes features such as task lists work logs, issue management, automatic task dependencies, subproject capability, budget and expense tracking, Gantt charts, and a full set of management reports.

onProject

- Another company offering online project management solutions is onProject (www.onproject.com). The company's myonProject application is a service that offers collaborative project management functionality. The application's Workspace page provides one-screen access to all key operations.
- Other useful features include Gantt charts, time and expense tracking, issue tracking, a web-based task calendar, automatic email notifications, file sharing, group discussion forums, contact management, and full project reporting. Pricing is on a per-user basis.

Project Drive

- The Project Drive (www.project-drive.net) application includes communication and collaboration features in addition to basic project management functionality. Users get a customizable overview dashboard, templates for fast project setup, Gantt charts, task management, resource allocation, document sharing and management, automated communication tools, a group calendar, cost analysis and budgeting, and a large number of management reports.

Vertabase

- Vertabase (www.vertabase.com) is a popular web-based project management application. It offers a summary executive dashboard, multiple schedule views, project portfolio, cross-project Gantt charts, resource planning, budget control, issue tracking, and a detailed project schedule.

Wrike

- Wrike (www.wrike.com) is a project management application that offers a unique way to create project tasks. The application is email based; emails from project members are automatically converted into tasks in the appropriate project. Wrike then automatically reminds employees about overdue tasks, creates individual schedules for employees, and generates Gantt charts for each project.

Zoho Projects

- Our final web-based project management application is Zoho Projects (projects.zoho.com), another popular product from the Zoho cloud combine. Zoho Projects is a standard project management application, complete with tasks and milestones, a project calendar, Gantt charts and other reports time tracking, and group file sharing.
- Zoho offers several different versions of the Projects application, from a single- project Free version to the Enterprise version that lets you manage an unlimited number of projects.