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Lotus Knows WebSphere® Portal

Enabling Business Agility At The Front-End

Alicia Lau
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lauapm@my.ibm.com

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The information on the new product is intended to outline our general product direction and it should not be relied on in making a purchasing decision.

The information on the new product is for informational purposes only and may not be incorporated into any contract. The information on the new product is not a commitment, promise, or legal obligation to deliver any material, code or functionality.

The development, release, and timing of any features or functionality described for our products remains at our sole discretion.

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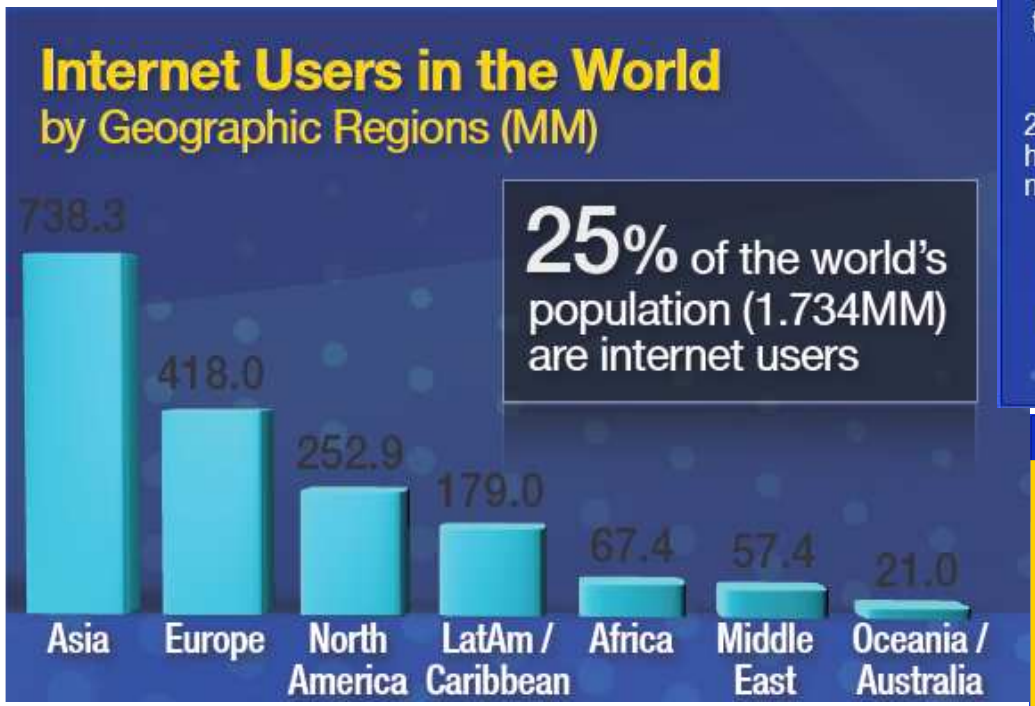
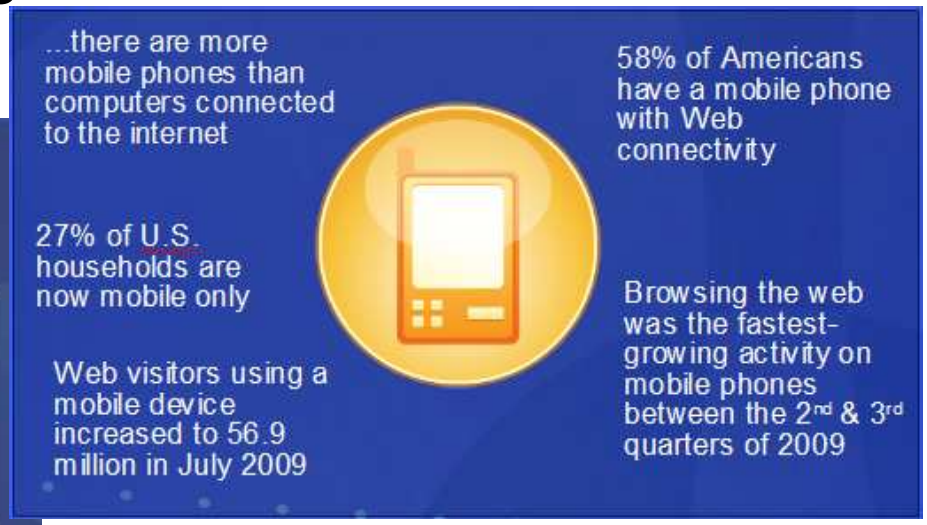
Doing More
Anywhere, Anytime... and Growing





2000	2009	Online Activities Shifting
35%	81%	Research products & services
27%	75%	Buy a product
19%	66%	Make travel reservations
0%	62%	Watch a video
10%	57%	Do online banking
0%	47%	Use a social network site
0%	32%	Read others' blogs
0%	31%	Provide ratings
52%	77%	of US adults use the internet

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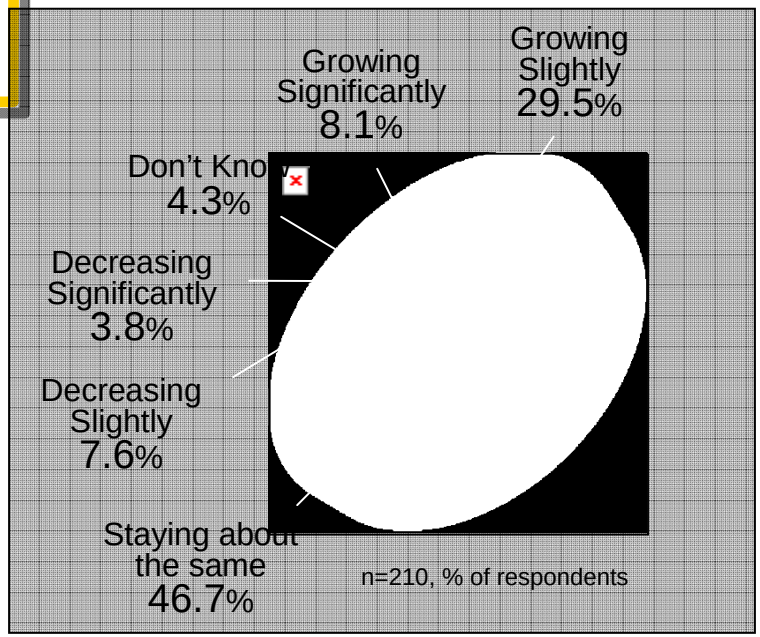
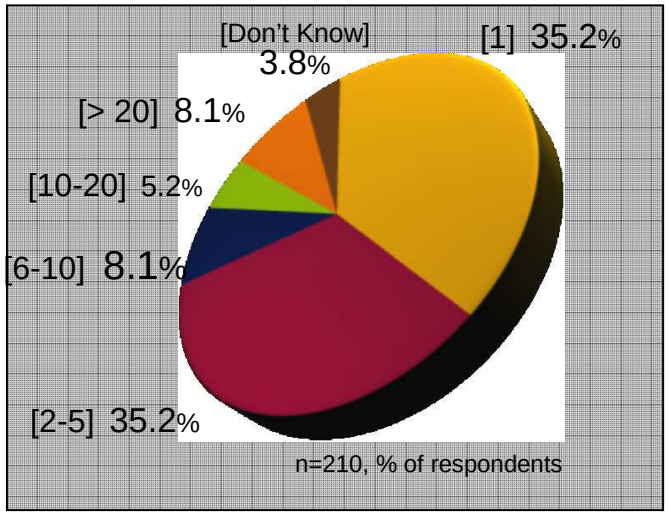
External-Facing Web Site Priorities

56% of organizations maintain **multiple** external-facing Web sites

84% of organizations will maintain or **increase investment** in their public Web site(s) in the next 12 months

Which of the following best reflects your company's planned investment in public websites over the next 12 months?





How many public web sites (including sites published in different local languages) does your organization maintain?

"...it's too **difficult** for content creators **to publish content** (and keep the site fresh and up to date)..."

"...they want to be able to **analyze Web site usage** and **user interactions** so that they can iteratively improve and tune their Web site(s) to **improve customer interaction."**

"...the **explosion** in the number and types of content — particularly **rich media** and other **persuasive content** — underscores the urgency in organizations today to make their Web sites more **compelling and engaging."**

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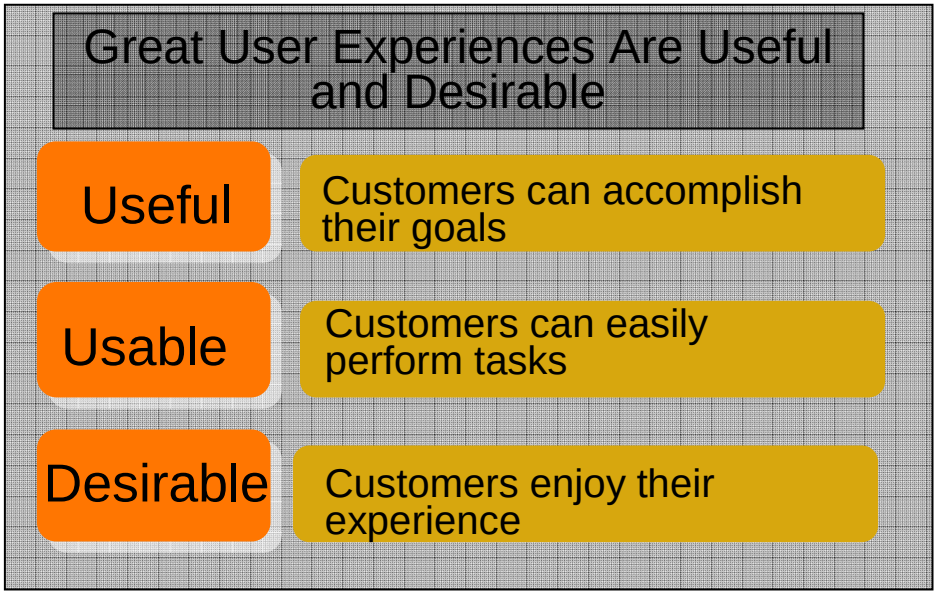
Lotus knows.

A Better Web Experience is a Better Business Experience

Exceptional Web Experiences can result in:

- **400% higher** visit-to-lead conversion rate
- **200% higher** visit-to-order conversion rate
- **41% lower** page abandonment rate
- **16.6% more** recommendations by customers for your products and services
- **15.8% fewer** customers lost to competitors
- **14.1% repeat purchase** interest by customers



"Best Practices In User Experience (UX) Design", Forrester Research, Inc., September 2009.

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Connecting customers, partners and employees creates measurable financial return

15%

Median reduction in **operating costs** in core processes (for example, immediately connect expert to solve exception process)

Employee

25% and **17%**

Median improvement in customer marketing **conversions** and **loyalty** with programs such as social media marketing

Customer

20%

Median reduction **in time to market** for products and services by connecting product teams with customers, channels

Partner

Source: McKinsey & Company, *How companies are benefiting from Web 2.0*, p 3, 2009.

"As for the future, your task is not to foresee it, but to enable it."
Antoine de Saint Exupéry
French author & aviator

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Look to the Future

2 billion Internet users by 2011...

How will you reach them?

Six-times as many non-PC devices to be connected to networks as PCs by 2012...

Will they all be able access your business?

Internet user online purchases will grow to $16 trillion by 2013...

How will you maximize your share?

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AGENDA

- IBM WebSphere Portal Overview
- Collaboration Agenda: Roadmap to A Measurable Collaboration ROI
- How IBM WebSphere Portal will Enable Business Agility at the Front-End to provide Exceptional Web Experiences
- New Generation: Moving Beyond Traditional Websites to Immersive Web Experience
- Question and Answer

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Portals provide a single point of personalized interaction with people, content, processes & applications, in context of the user

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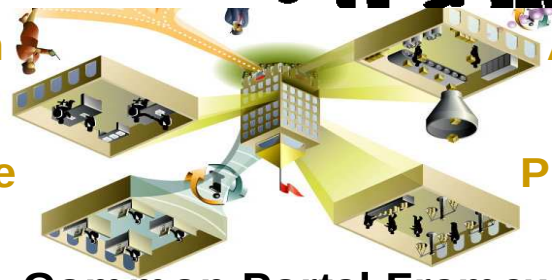
Organizations use portals to drive cost savings, operational efficiency, and revenue increases through more valuable interactions with customers, employees, and suppliers

B2E Portals *improve employee and management work productivity and decision support quality*

Connect Interact Innovate

B2C Portals *improve communication and service quality to customers and external stakeholders*

B2B Portals *improve collaborative transactions and knowledge sharing with key business partners*



Common Portal Framework

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For example, in healthcare, a portal/forms solution can address multiple issues and opportunities

Key Pain Points	IBM Portal Capabilities and Features
People Management	· Self-service HR administrative access · Enhanced on-line recruiting processes and approval workflows · Improved integration of workforce performance and management systems
Role-based Information	· Roles-based delivery of content and information · Pushed information to different devices to increase usability · Targeted alerts and communication to appropriate audiences
Business Process Driven Integration	· **Streamline patient on-boarding via electronic forms** · **Automated confirmation of insurance coverage status** · **On-line document retrieval** · **Reduced cost of procuring and distributing paper-based forms** · **Reduced time and effort required to develop and maintain forms** · **Avoid additional IT infrastructure to integrate XML data into forms**
Role-based KPIs, Alerts & Analytics	· Quick access to leading business indicators by region · Dashboards with color indicators to highlight trouble spots
Storage and Archival of Forms	· Reduced cost of manual labor associated with storing and archiving forms · Avoid IT infrastructure cost associated with storage and archiving forms (e.g., scanning/imaging equipment

EXCEPTIONAL USER EXPERIENCE

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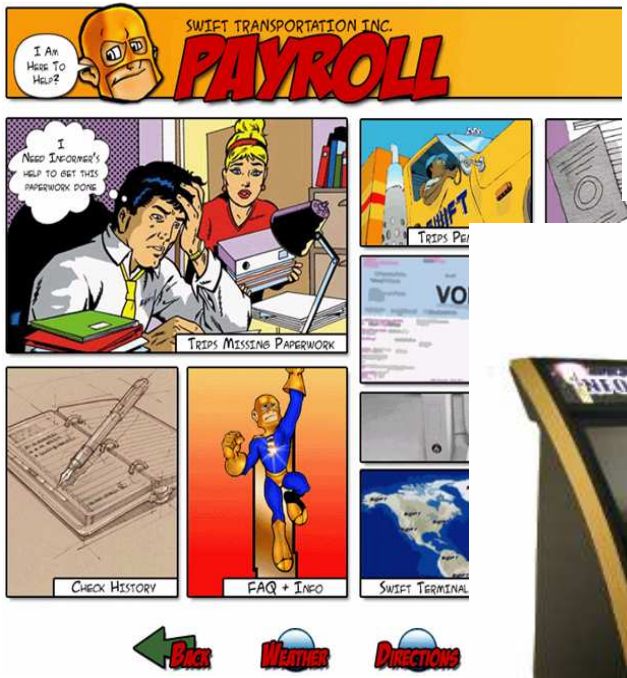
Swift Transportation – Driver Self Service

- A tailored experience for drivers
  - Low level of computer experience
  - $3,000 to hire a driver, 120% turn over rate
- Owner Operator Portal and “The Informer” Kiosk
  - Self service while on the road
- Business Value
  - 20% reduction in total calls led to reduction in support staff
  - Increased morale with drivers
    - 30min hold time down to 1min
    - Reduction in time to get paid for work
    - Consistent communication, collaborate with home and Swift HQ



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The **Collaboration Agenda**
is an industry-specific, structured approach to realize measurable business value from improving the way people interact

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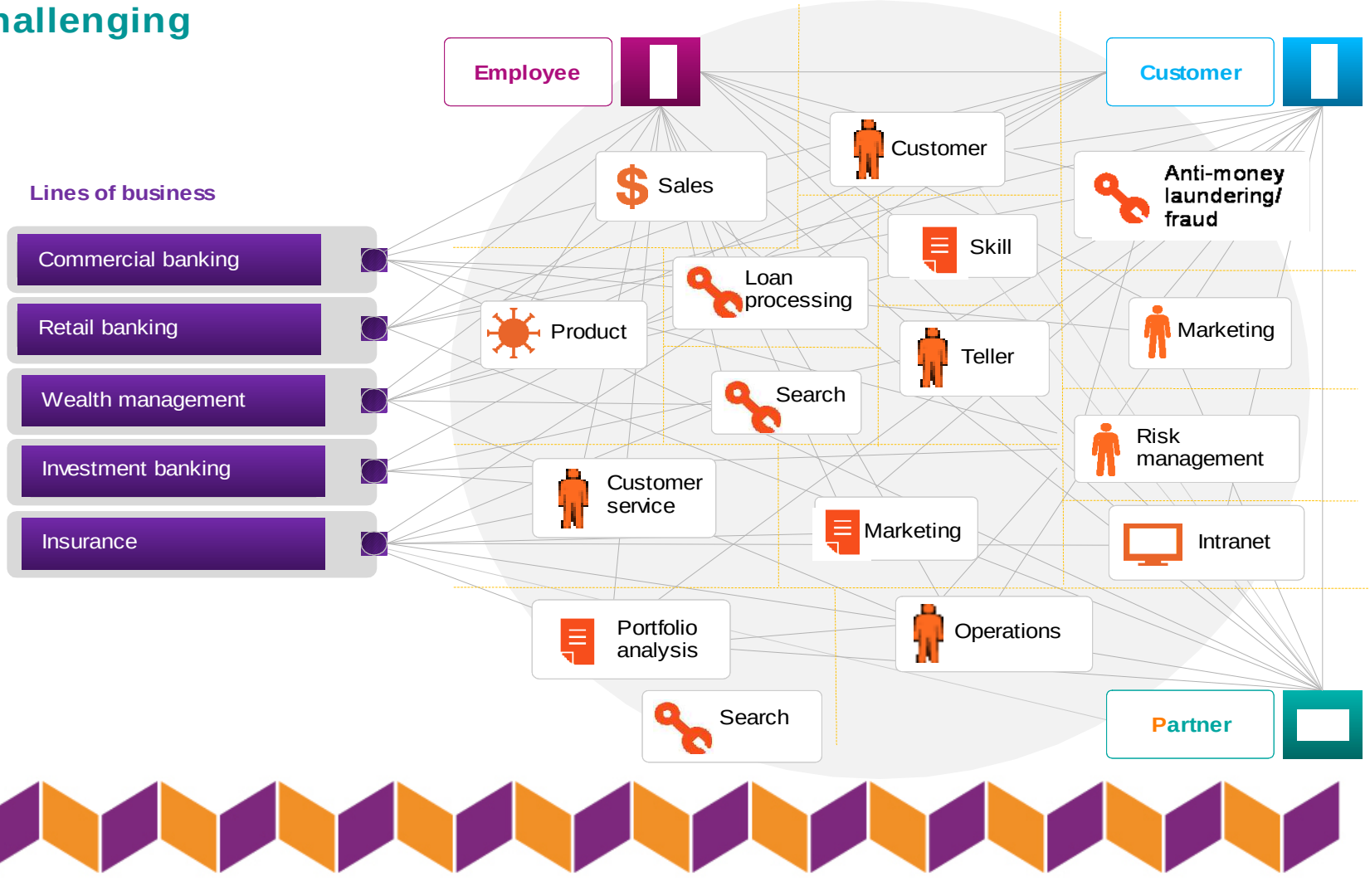
Communication barriers & information overload

Whether working or investing, building the right relationships can be challenging



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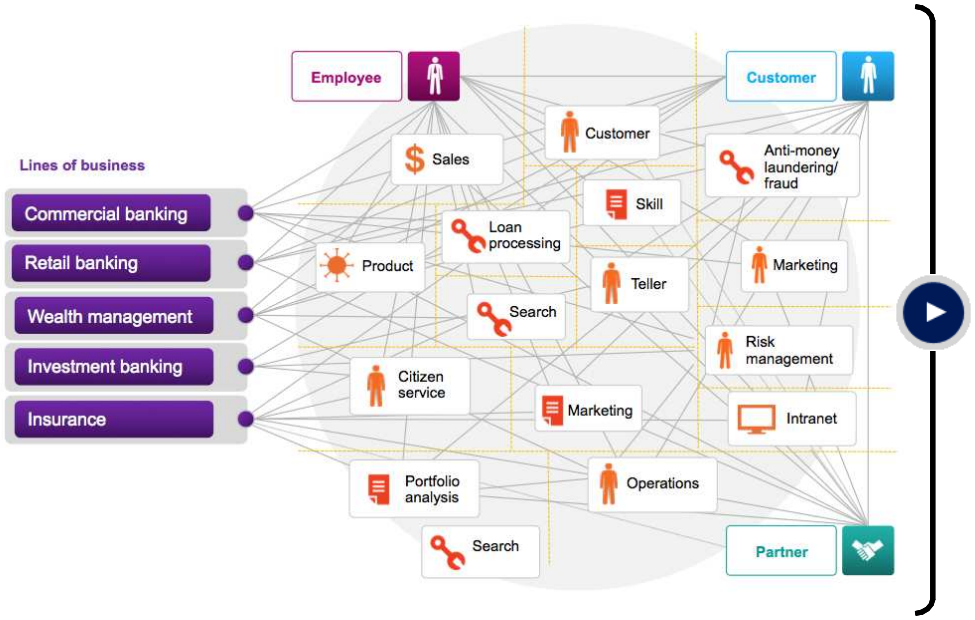
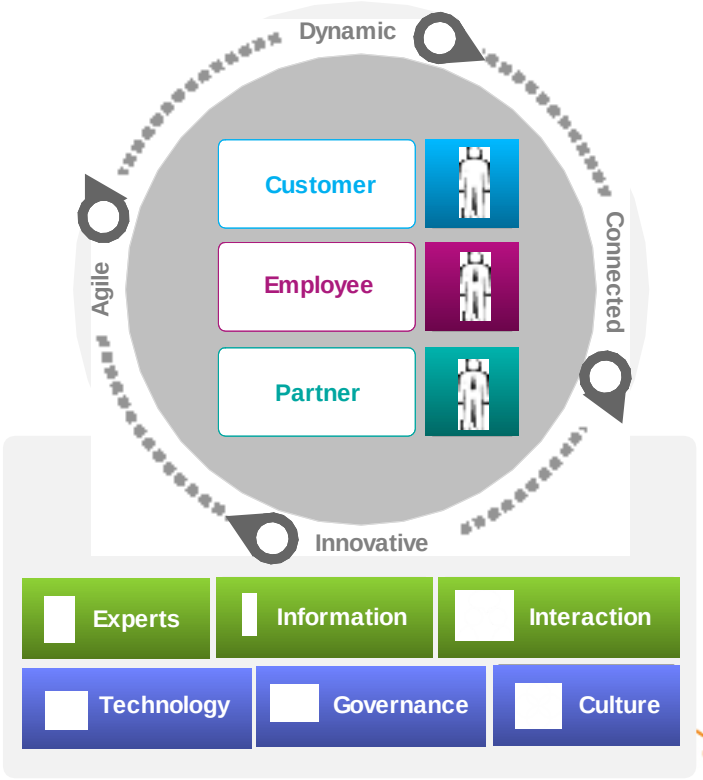
How can you become an expertise-based organization?

By adopting a smarter, more integrated collaboration approach





CURRENT STATE **DESIRED STATE**

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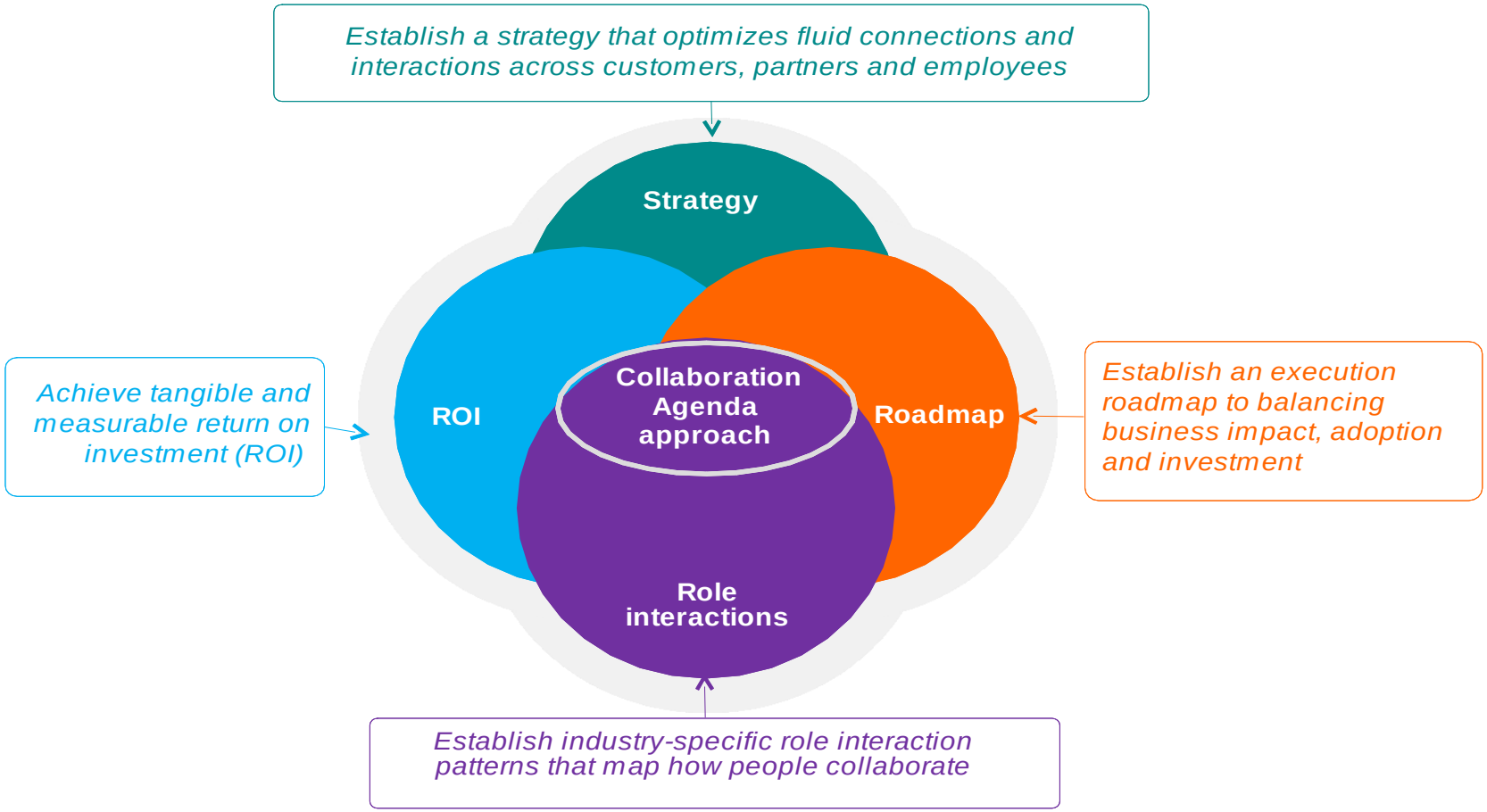
The industry-based *IBM Collaboration Agenda approach* rapidly creates a roadmap to deliver a measurable ROI



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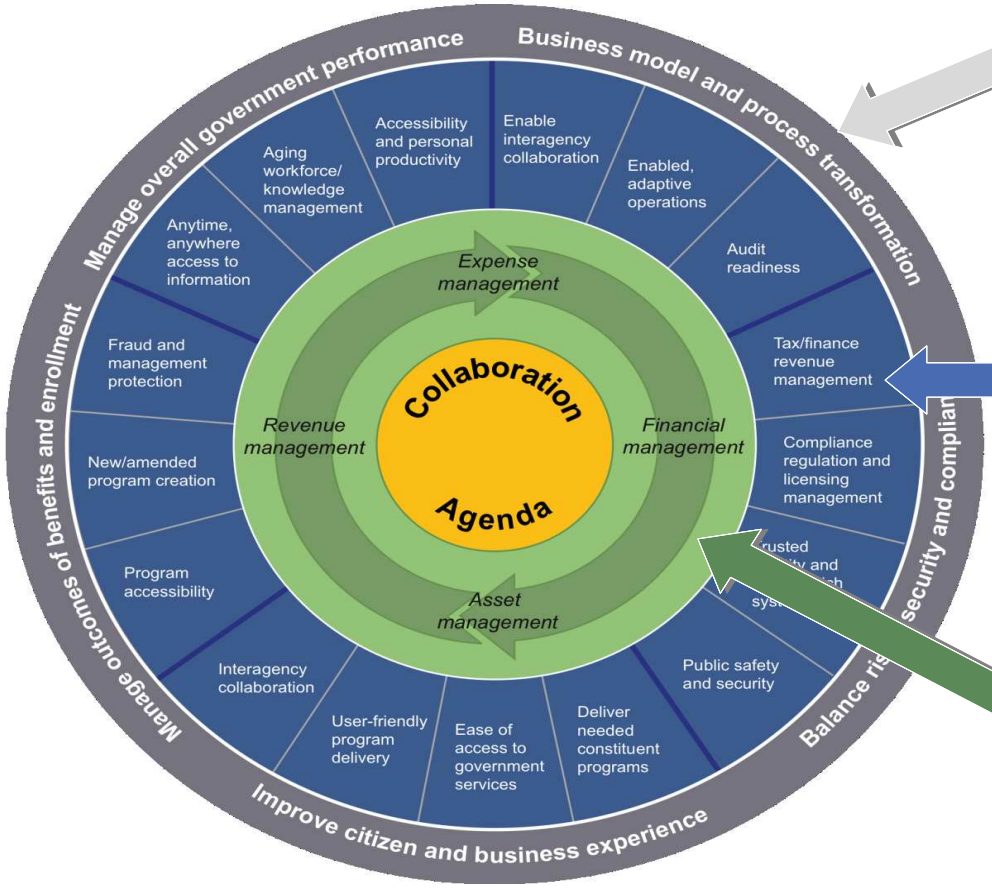
Business optimization map

Targets collaboration to the greatest value for individual organizations



Strategic imperatives

The key focus areas for a specific industry that are critical to improving overall business performance

Business objectives

The processes and activities that can be optimized through more effective use of collaboration in support of the strategic imperatives

Core management processes

The underlying processes that are prevalent across the company that must be managed for improved performance

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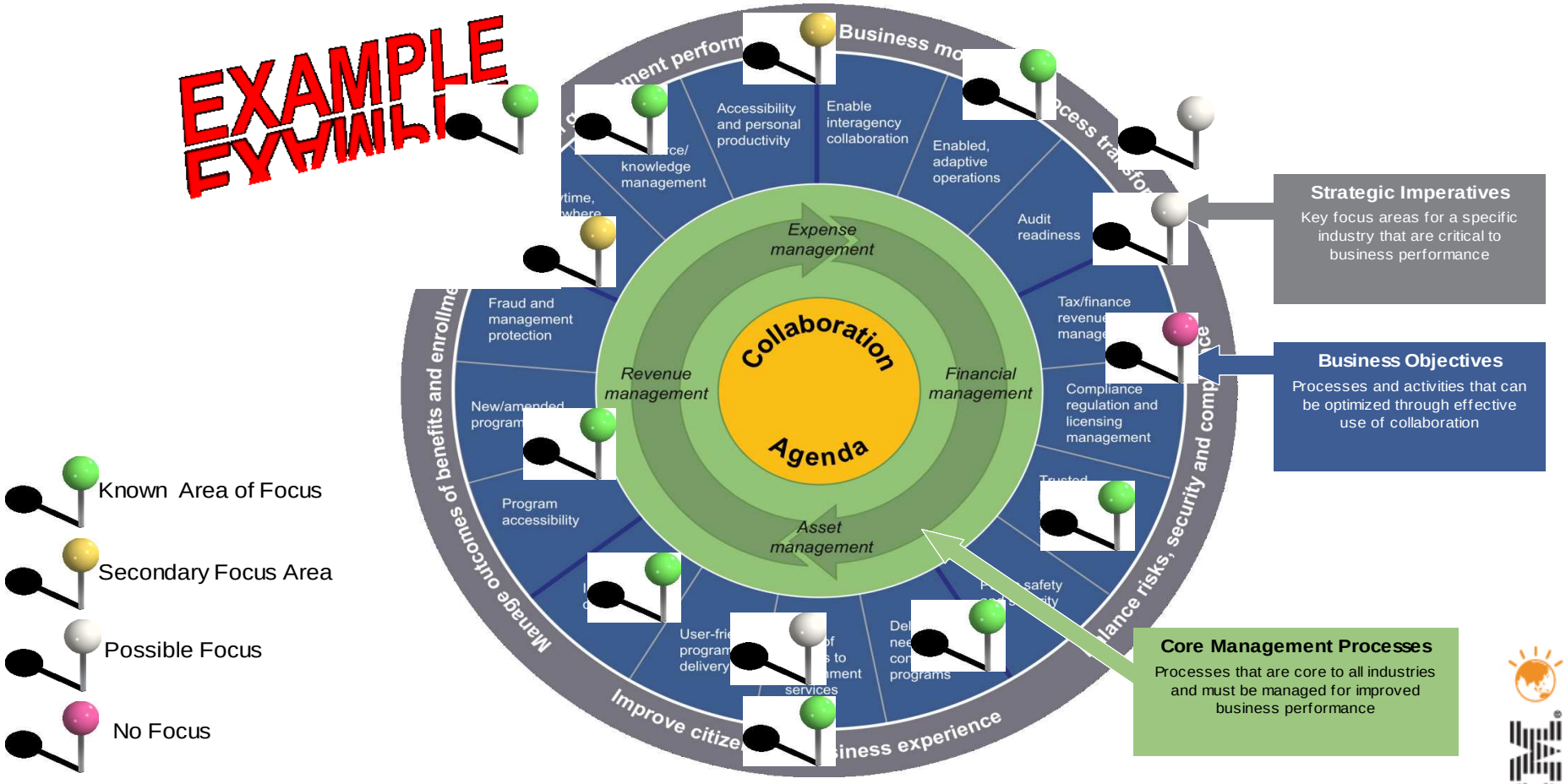
Business Optimization Maps
Color Code Client Imperatives and objectives according to priority



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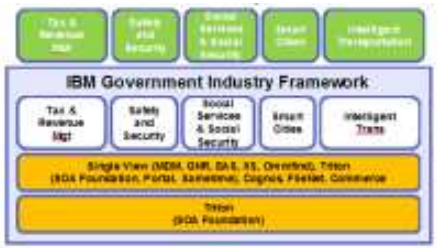
The Collaboration Agenda feeds key collaborative solution components into the IBM Industry Frameworks

Business Optimization Map identifies repeatable patterns & best practices, leading to...

on-ramps for domains & projects included in the appropriate Industry Framework...

which provides a proven set of IBM software solutions to address key vertical business challenges.



EXCEPTIONAL USER EXPERIENCE

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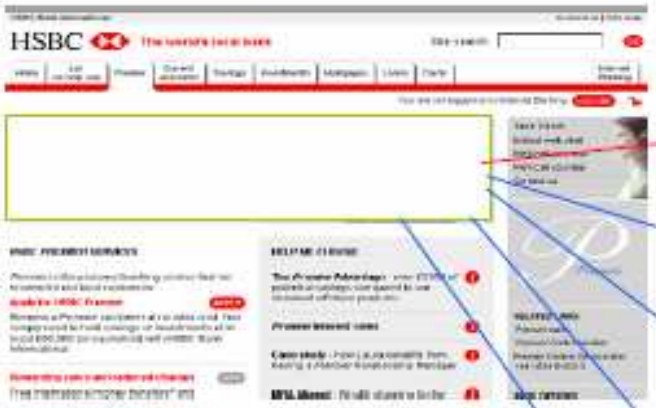
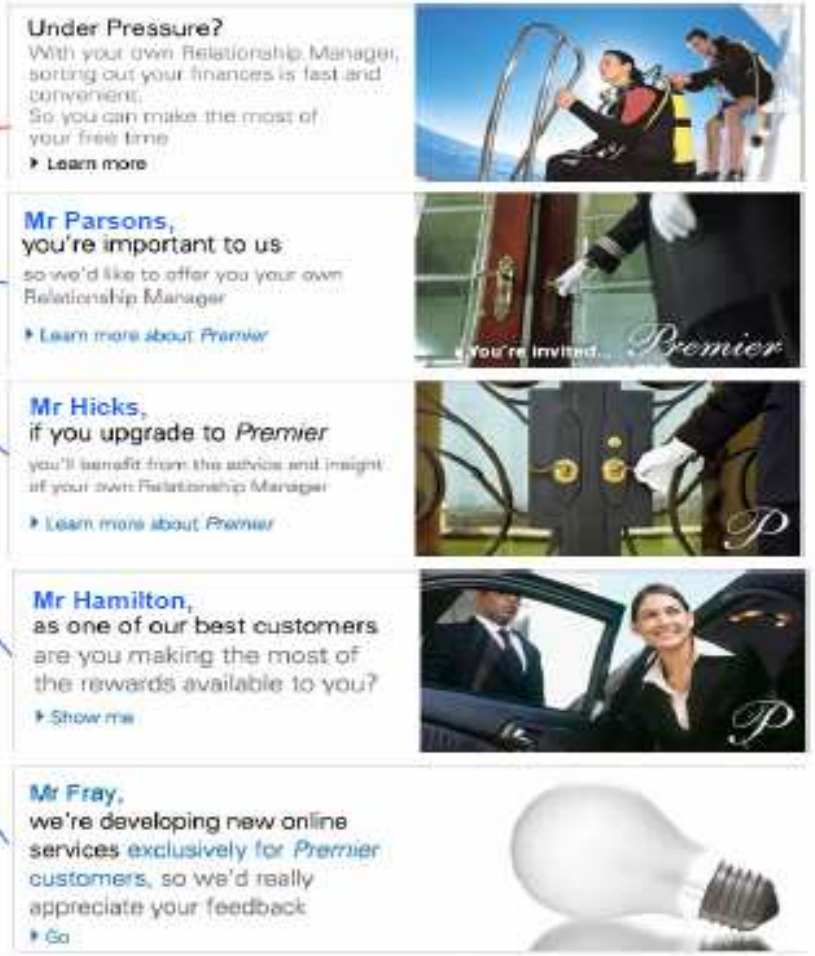
HSBC: Crafting an Exceptional User Experience



Banners using customer data held in the back-end



HSBC

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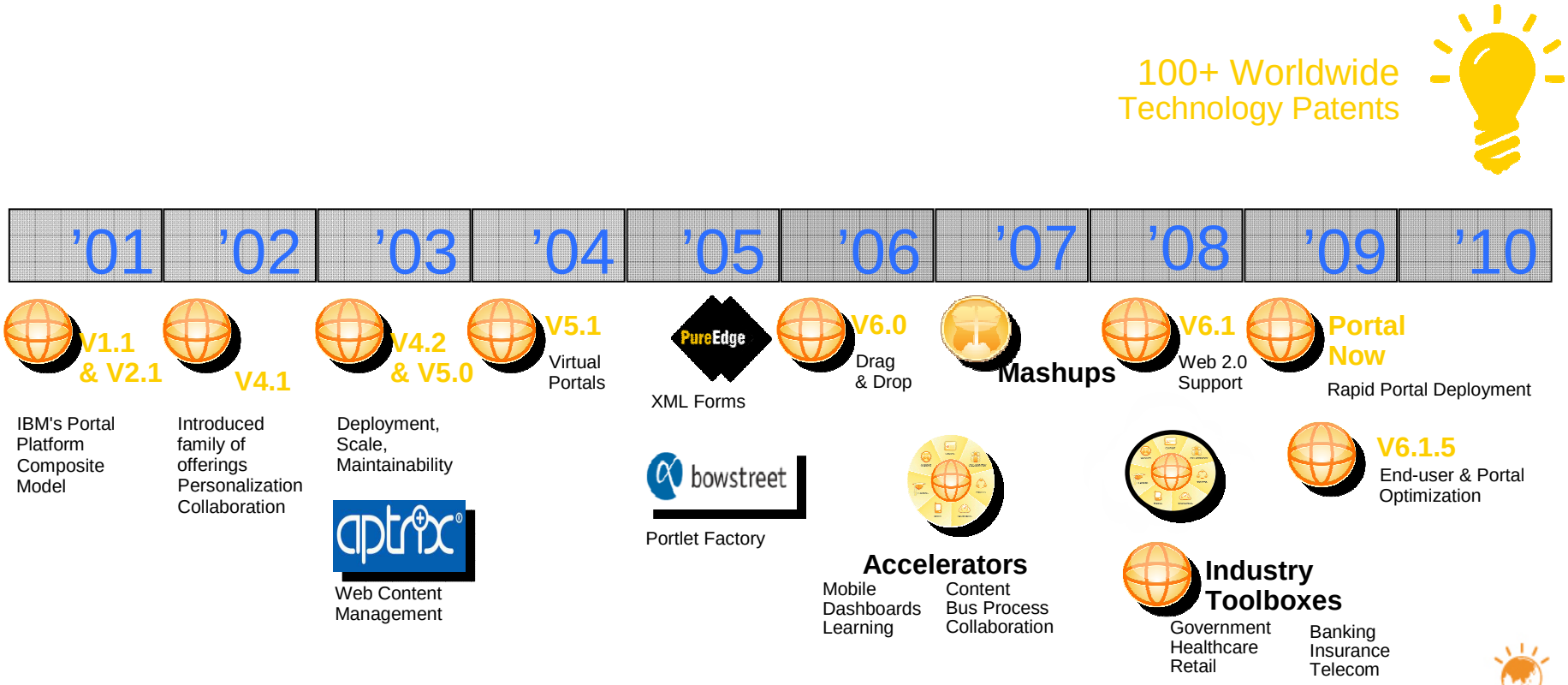
IBM WebSphere® Portal
Ready for the Next 10 Years

100+ Worldwide
Technology Patents



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"WebSphere Portal - #1 in Worldwide Revenue from 2001 to 2008" (1) Source: Gartner, Inc. "Market Share: Application Infrastructure and Middleware Software, Worldwide, 2008," Fabrizio Biscotti, 29 April 2009.

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Award Winning
CUSTOMERS

HSBC Bank Brazil – Employee Portal
2009 Intranet Design Award, Nelson Norman Group (Recipient)

US Army Publishing Directorate – Army Action Tracking System
2009 Army Knowledge Management Award (Winner)

Los Angeles County – Municipal Portal
2009 National Association of Counties Achievement Award (Winner)

Miami-Dade County – Housing Central Portal
2007 Digital Government Achievement Award (Winner)

State of Missouri – Emergency Response Information System Portal
2008 Computerworld Honors (Laureate)

City of Gothenburg – Citizen Portal
2009 GT Newspaper Achievement Award (Recognized)

Duke University Health System – Patient Portal
2008 Healthcare Informatics Innovator (Finalist)

Bharti Airtel – Mobile Portal
2008 Strategy Analytics Wireless Media Lab (Best Portal)

U.S. Nuclear Regulatory Commission – Electronic Information Exchange
2009 Excellence.Gov Award (Finalist)

City of Helsinki – Citizen Portal
2007 UN Report: Digital Governance in Municipalities (#1 in Europe)

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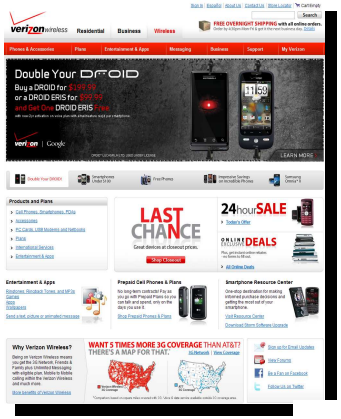
How do we Achieve Sustained Leadership?

Partner with
our customers
on development

Customers creating industry leading Portal sites



Delivering an agile platform

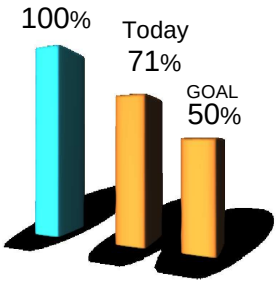
web 2.0
AJAX
WSRP 2.0
JSR 286

Rapid support & inclusion of latest technology

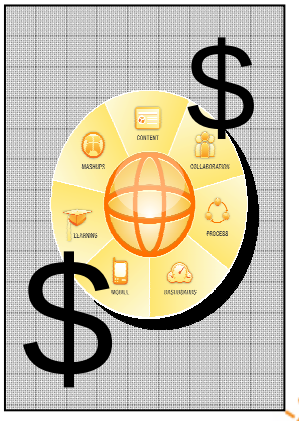
Leading new Web functionality & open standards

Cost to Run Portal...

Custom WebSphere



Total cost of ownership advantages



IBM sustained strategic investment area

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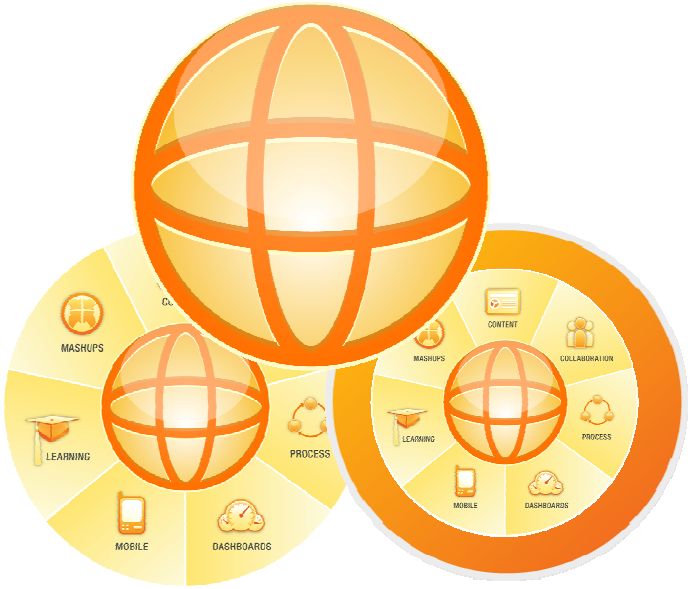
Wave of New Possibilities

Last 100 Days

WebSphere Portal
Core Integration
Platform



Accelerators
Extend
Portal - Matching
Customer Needs

Industry Tooboxes
Offer
Industry Templates,
Assets & Best
Practices

- **WebSphere Portal (and zOS) v6.1.5**
- **WebSphere Portlet Factory v6.1.5**
- **IBM Content Accelerator**
- **IBM Collaboration Accelerator**
- **IBM Mashup Accelerator**
- **IBM Business Process Accelerator (zLinux)**
- **Lotus Forms Server: Unlimited Viewer Edition**
- **Government Industry Template**
- **IBM Portal NOW v2**
- **Portal / Mashups / Forms on Amazon Cloud**
- **Portal / Mashups on IBM Smart Business Development & Test Cloud BETA**

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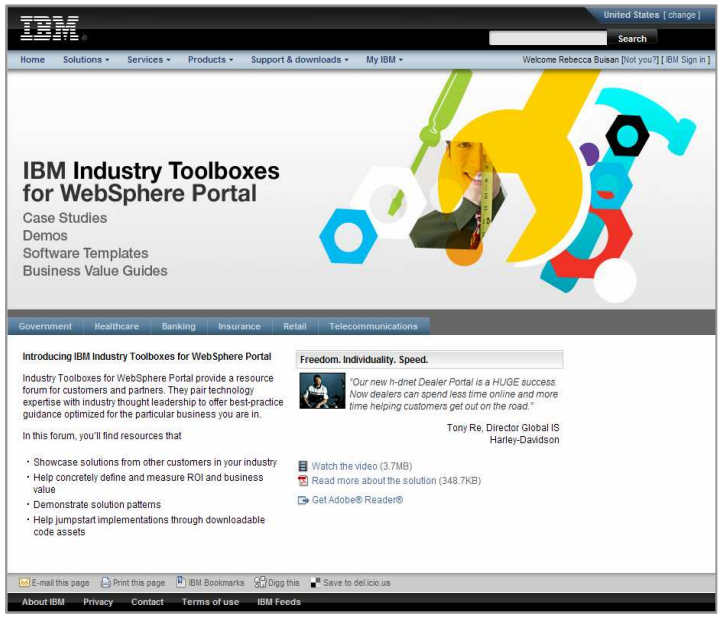
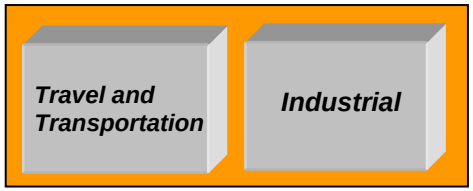
Two New Industry Toolboxes for WebSphere Portal

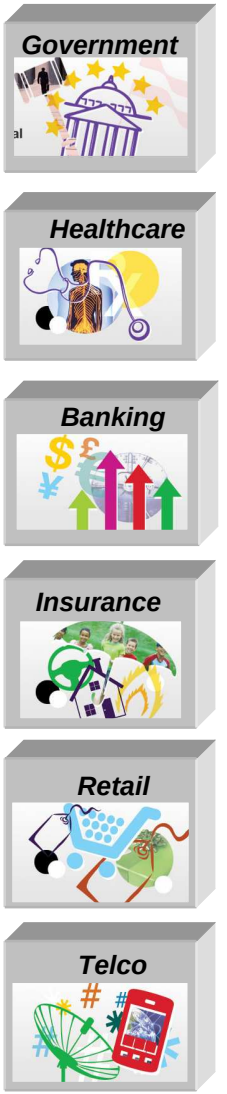
- **Application Briefs**
  describing solution scenarios.
- **Business Value Guides**
  describing the value enabled by the WebSphere Portal and Accelerators, and help illustrate best-practice process and information flow.
- **Templates**
  software assets for WebSphere Portal and Lotus collaboration products that can be used to help jumpstart design and assembly of end solutions.
- **Demonstrations**
  and recordings of example solutions design that illustrate how end solutions can look like.
- **Other Code Assets**
  include sample Forms, Dashboards, or other Portlets which can help expedite the assembly of a solution.



www.ibm.com/websphere/portal/industry



Coming in Q1 ...



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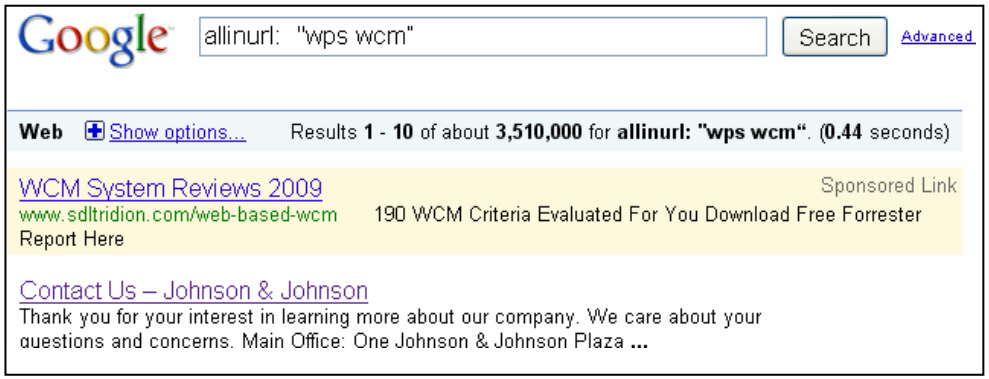
Web Content Management
2009 Momentum

Six Consecutive Quarters of Growth and Increased Market Share

- Major 2009 Wins
  Citizens Bank, BHP Billiton, PNC Bank, The North Face, Australian Tax Office, Jyske Bank, Sogei, Los Angeles County, TelMex, Sony Semiconductor

3.5M WCM pages on public internet, millions more behind passwords



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EXCEPTIONAL USER EXPERIENCE

Blue Cross Blue Shield of South Carolina

Challenge

The existing solution:

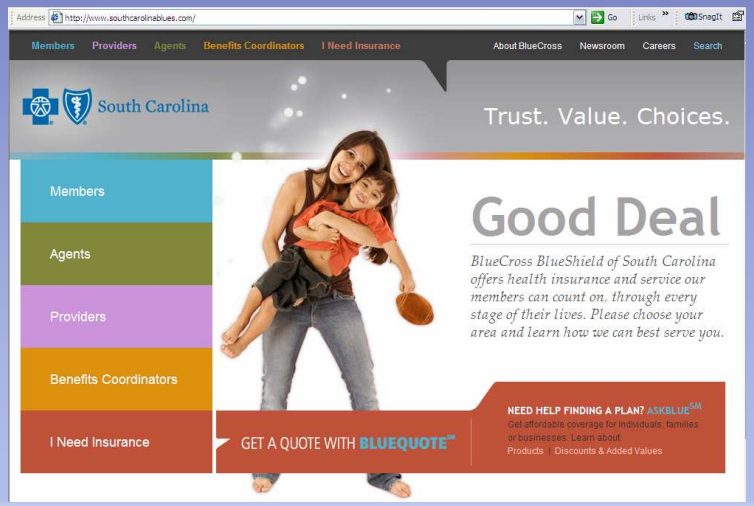
- Required IT involvement to change content.
- Prevented business users from managing content for secure and non-secure customer portals.
- Lacked single-sign-on, personalization, and access to comprehensive plan information.

Solution

- Replace the existing static content with content managed by Lotus Web Content Management.
- Leverage the personalization engine.
- Provide business users with advanced Web content management capabilities.
- Allow customers to review their plan information, including benefits, deductibles, services performed and account balances.
- Include a plan comparison tool for use by members and nonmembers.

Business Benefits

- Serves content to approximately one million customers and twelve thousand employees
- Improves the overall experience for users.
- Provides potential members with better access to plan data and comparisons.
- Improves control over content and allows them to develop content more quickly.
- Allows business users to produce and managing content without IT intervention.



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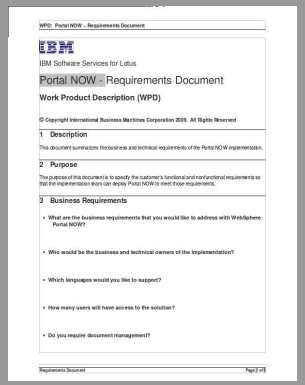
Portal NOW
Prescriptive Deployment Guides for Predictable Projects

Requirements Document


WPD: Portal NOW – Requirements Document

IBM

IBM Software Services for Lotus

Portal NOW - Requirements Document

Work Product Description (WPD)

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1 Description

This document summarizes the business and technical requirements of the Portal NOW implementation.

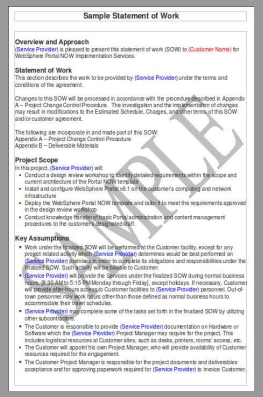
2 Purpose

The purpose of this document is to specify the customer's functional and nonfunctional requirements so that the implementation team can deploy Portal NOW to meet those requirements.

3 Business Requirements

- What are the business requirements that you would like to address with WebSphere Portal NOW?
- Who would be the business and technical owners of the implementation?
- Which languages would you like to support?
- How many users will have access to the solution?
- Do you require document management?

Statement of Work (SOW)


Sample Statement of Work

Overview and Approach

(Service Provider) is pleased to present this statement of work (SOW) to (Customer Name) for WebSphere Portal NOW Implementation Services.

Statement of Work

This section describes the work to be provided by (Service Provider) under the terms and conditions of the agreement.

Changes to this SOW will be processed in accordance with the procedures described in Appendix A – Project Change Control Procedure. The investigation and the implementation of changes may result in modifications to the Estimated Schedule, Charges, and other terms of this SOW and/or customer agreement.

The following are incorporate in and made part of this SOW:
Appendix A – Project Change Control Procedure
Appendix B – Deliverable Materials

Project Scope

In this project, (Service Provider) will:

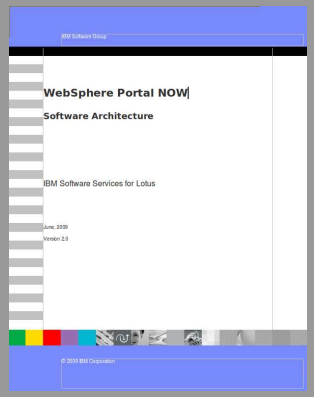
- Conduct a design review workshop to further detailed requirements within the scope and current architecture of the Portal NOW template.
- Install and configure WebSphere Portal v6.1 on the customer's computers and network infrastructure
- Deploy the WebSphere Portal NOW template and tailor it to meet the requirements approved in the design review workshop
- Conduct knowledge transfer about Portal administration and content management procedures to the customer's designated staff.

Key Assumptions

- Work under the finalized SOW will be performed at the Customer facility, except for any project related activity which (Service Provider) determines would be best performed on (Service Provider) premises in order to cooperate its obligations and responsibilities under the Portal NOW. Such activity will be chargeable to Customer.
- (Service Provider) will provide the services under the finalized SOW during normal business hours, 8:30 AM to 5:15 PM Monday through Friday, except holidays. If necessary, Customer will provide after hours access to Customer facilities to (Service Provider) personnel. Out-of-town personnel may work hours other than those defined as normal business hours to accommodate their travel schedules.
- (Service Provider) may complete some of the tasks set forth in the finalized SOW by utilizing other subcontractors.
- The Customer is responsible to provide (Service Provider) documentation on Hardware or Software which the (Service Provider) Project Manager may require for the project. This includes logistical resources at Customer sites, such as desks, printers, rooms' access, etc.
- The Customer will appoint his own Project Manager, who will provide availability of Customer resources required for the engagement.
- The Customer Project Manager is responsible for the project documents and deliverables acceptance and for approving paperwork required for (Service Provider) to invoice Customer.

SAMPLE

Software Architecture


IBM Software Group

WebSphere Portal NOW

Software Architecture

IBM Software Services for Lotus

June, 2009

Version 2.0

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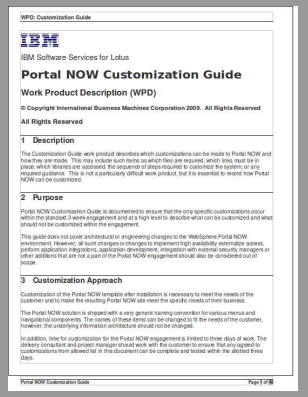
Customization Guide


WPD: Customization Guide

IBM

IBM Software Services for Lotus

Portal NOW Customization Guide

Work Product Description (WPD)

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1 Description

The Customization Guide work product describes which customizations can be made to Portal NOW and how they are made. This may include such items as which files are required, which links must be in place, which libraries are accessed, the sequence of steps required to customize the system, or any required guidance. This is not a particularly difficult work product, but it is essential to record how Portal NOW can be customized.

2 Purpose

Portal NOW Customization Guide is documented to ensure that the only specific customizations occur within the standard 3 week engagement and at a high level to describe what can be customized and what should not be customized within the engagement.

This guide does not cover architectural or engineering changes to the WebSphere Portal NOW environment. However, all such changes or changes to implement high availability extensible access, perform application integrations, application development, integration with external security managers or other additions that are not a part of the Portal NOW engagement should also be considered out of scope.

3 Customization Approach

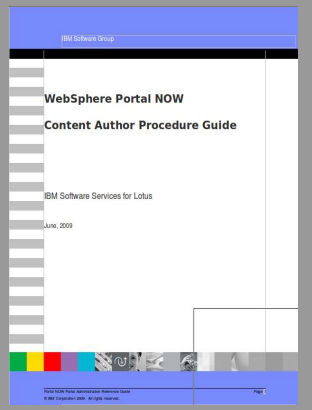
Customization of the Portal NOW template after installation is necessary to meet the needs of the customer and to make the resulting Portal NOW site meet the specific needs of their business.

The Portal NOW solution is shipped with a very generic naming convention for various menus and navigational components. The names of these items can be changed to fit the needs of the customer, however, the underlying information architecture should not be changed.

In addition, time for customization for the Portal NOW engagement is limited to three days of work. The delivery consultant and project manager should work with the customer to ensure that any agreed to customizations from allowed list in this document can be complete and tested within the allotted three days.

Portal NOW Customization Guide Page 3 of 8

Content Author Procedure Guide


IBM Software Group

WebSphere Portal NOW

Content Author Procedure Guide

IBM Software Services for Lotus

June, 2009

Portal NOW Portal Administration Reference Guide Page 1

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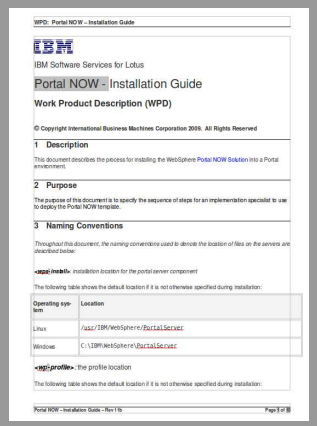
Installation Guide


WPD: Portal NOW – Installation Guide

IBM

IBM Software Services for Lotus

Portal NOW - Installation Guide

Work Product Description (WPD)

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1 Description

This document describes the process for installing the WebSphere Portal NOW Solution into a Portal environment.

2 Purpose

The purpose of this document is to specify the sequence of steps for an implementation specialist to use to deploy the Portal NOW template.

3 Naming Conventions

Throughout this document, the naming conventions used to denote the location of files on the servers are described below:

<wps-install>: installation location for the portal server component

The following table shows the default location if it is not otherwise specified during installation:

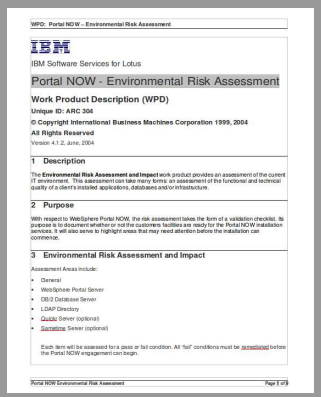
Operating system	Location
Linux	/usr/IBM/WebSphere/PortalServer
Windows	C:\IBM\WebSphere\PortalServer

<wps-profile>: the profile location

The following table shows the default location if it is not otherwise specified during installation:

Portal NOW – Installation Guide – Rev 1.0b Page 5 of 10

Environmental Risk Assessment


WPD: Portal NOW – Environmental Risk Assessment

IBM

IBM Software Services for Lotus

Portal NOW - Environmental Risk Assessment

Work Product Description (WPD)

Unique ID: ARC 306

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Version 4.1.2, June, 2004

1 Description

The **Environmental Risk Assessment and Impact** work product provides an assessment of the current IT environment. This assessment can take many forms: an assessment of the functional and technical quality of a client's installed applications, databases and/or infrastructure.

2 Purpose

With respect to WebSphere Portal NOW, the risk assessment takes the form of a validation checklist. Its purpose is to document whether or not the customers facilities are ready for the Portal NOW installation services. It will also serve to highlight areas that may need attention before the installation can commence.

3 Environmental Risk Assessment and Impact

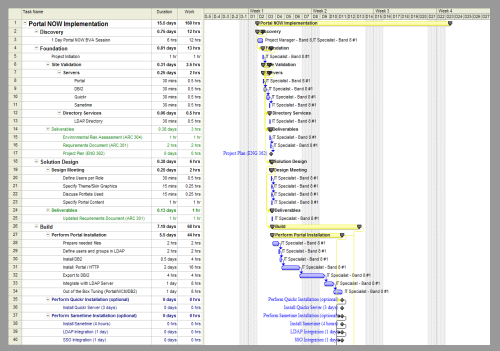
Assessment Areas include:

- General
- WebSphere Portal Server
- DB2 Database Server
- LDAP Directory
- Quickr Server (optional)
- Sametime Server (optional)

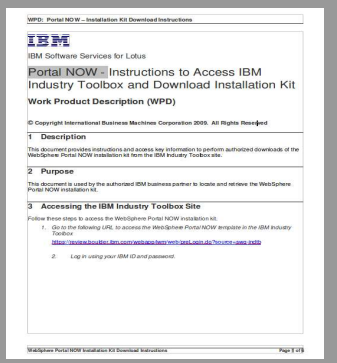
Each item will be assessed for a pass or fail condition. All "fail" conditions must be remediated before the Portal NOW engagement can begin.

Portal NOW Environmental Risk Assessment Page 1 of 9

Project Plan



Install Kit Download Guide


WPD: Portal NO W – Installation Kit Download Instructions

IBM

IBM Software Services for Lotus

Portal NOW - Instructions to Access IBM Industry Toolbox and Download Installation Kit

Work Product Description (WPD)

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1 Description

This document provides instructions and access key information to perform authorized downloads of the WebSphere Portal NOW installation kit from the IBM Industry Toolbox site.

2 Purpose

This document is used by the authorized IBM business partner to locate and retrieve the WebSphere Portal NOW installation kit.

3 Accessing the IBM Industry Toolbox Site

Follow these steps to access the WebSphere Portal NOW installation kit.

1. *Go to the following URL to access the WebSphere Portal NOW template in the IBM Industry Toolbox*

   https://toolbox.boulder.ibm.com/webapps/ssm/web/pwt_login.do?tmpvnt=pwt_login

2. *Log in using your IBM ID and password.*

WebSphere Portal NOW Installation Kit Download Instructions Page 3 of 9

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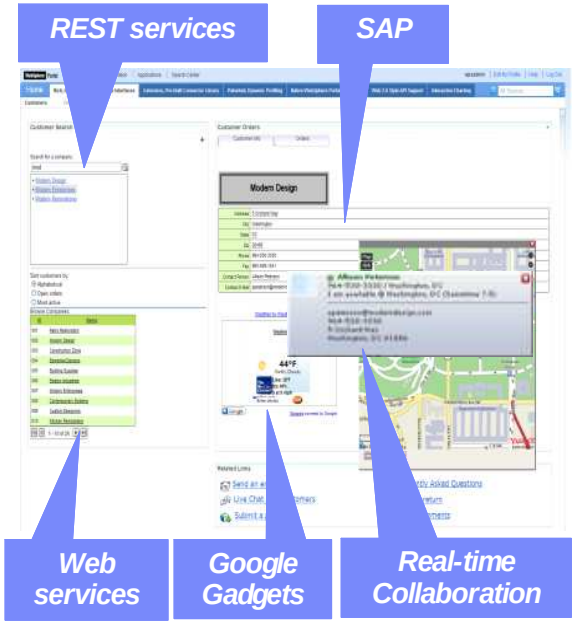
WebSphere Portal + WebSphere Portlet Factory = The Ultimate Exceptional Web Experience Platform

Providing a Complete, Ubiquitous, Engaging and Immersive Experience that is Always-Available

- Rapidly Leverage WebSphere Portal Features:
  - Embed collaboration, facilitate real-time problem solving (people awareness)
  - Provide a seamless user experience by leveraging Single Sign On to transparently access disparate back-end systems (credential vault)
  - Integrate data from multiple back-end systems by creating composite applications (inter-portlet communication)
  - Empower business user and administrator led customization (personalize, configure and edit)
  - Iteratively create, test and deploy applications (automated deployment)

Rich, Composite, Role-Based Portal Applications - Fast



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Extending the NEXT Generation Web Experience Platform

2010 Portal Pillar Roadmap...

Simpler, Richer Web Experiences

Web Content Management Excellence
- Improved Authoring & User Experience
- Tighter Portal integration

Multi-Channel Delivery
- Improved personalization
- Out-of-box mobile application support
- Client framework widgets, samples

Web 2.0 & Social
- Web content tagging, rating, and searching
- Portlets for Lotus Connections profiles, wikis, tags & more
- Enhanced web 2.0 eForms
- Saba eLearning enhancements

Cost of Ownership
- Virtualization and portal farming
- Serviceability
- Public and Private Cloud Deployment Options

Analytics
- Tooling that enables onsite analytics to optimize your site

Value & Customization
- Industry and Portal NOW Templates
- Best practice guidelines spanning WPLC portfolio
- Out of the box samples continuously delivered via Portal Catalog

Rapid Application Development
- New Dashboard builders and ILOG jViews charting
- Usability and visual application support

The information on the new product is intended to outline our general product direction and it should not be relied on in making a purchasing decision. The information on the new product is for informational purposes only and may not be incorporated into any contract. The information on the new product is not a commitment, promise, or legal obligation to deliver any material, code or functionality. The development, release, and timing of any features or functionality described for our products remains at our sole discretion.

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AGENDA

- IBM WebSphere Portal Overview
- Collaboration Agenda: Roadmap to A Measurable Collaboration ROI
- How IBM WebSphere Portal will Enable Business Agility at the Front-End to provide Exceptional Web Experiences
- New Generation: Moving Beyond Traditional Websites to Immersive Web Experience
- Question and Answer

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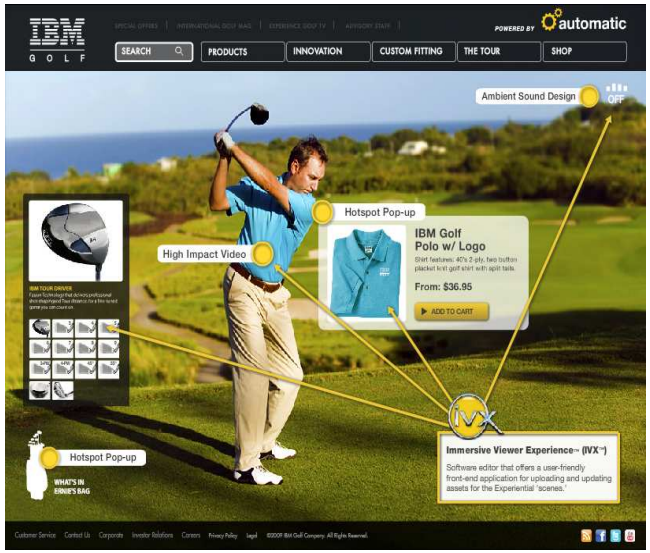
The Wave
of Future Possibilities

Converted Broadband Applications

- High definition & high quality
- Social applications
- Games & two-way interactions
- Personalized entertainment
- Personal content, for sharing
- Mobile access
- Consumable on three screens (TV, mobile, PC)



Immersive Viewer Experience

- Full motion selectable on-demand, fly-in video objects
- Keystrokes calibrated with sound feedback
- Mouse-driven Axial pan navigation (5-axes)
- Intelligent Feedback: click one path, and the site returns
  information to the user based on that set of keystrokes

Web Accessibility

Visual Backchannel

Dune

Audry

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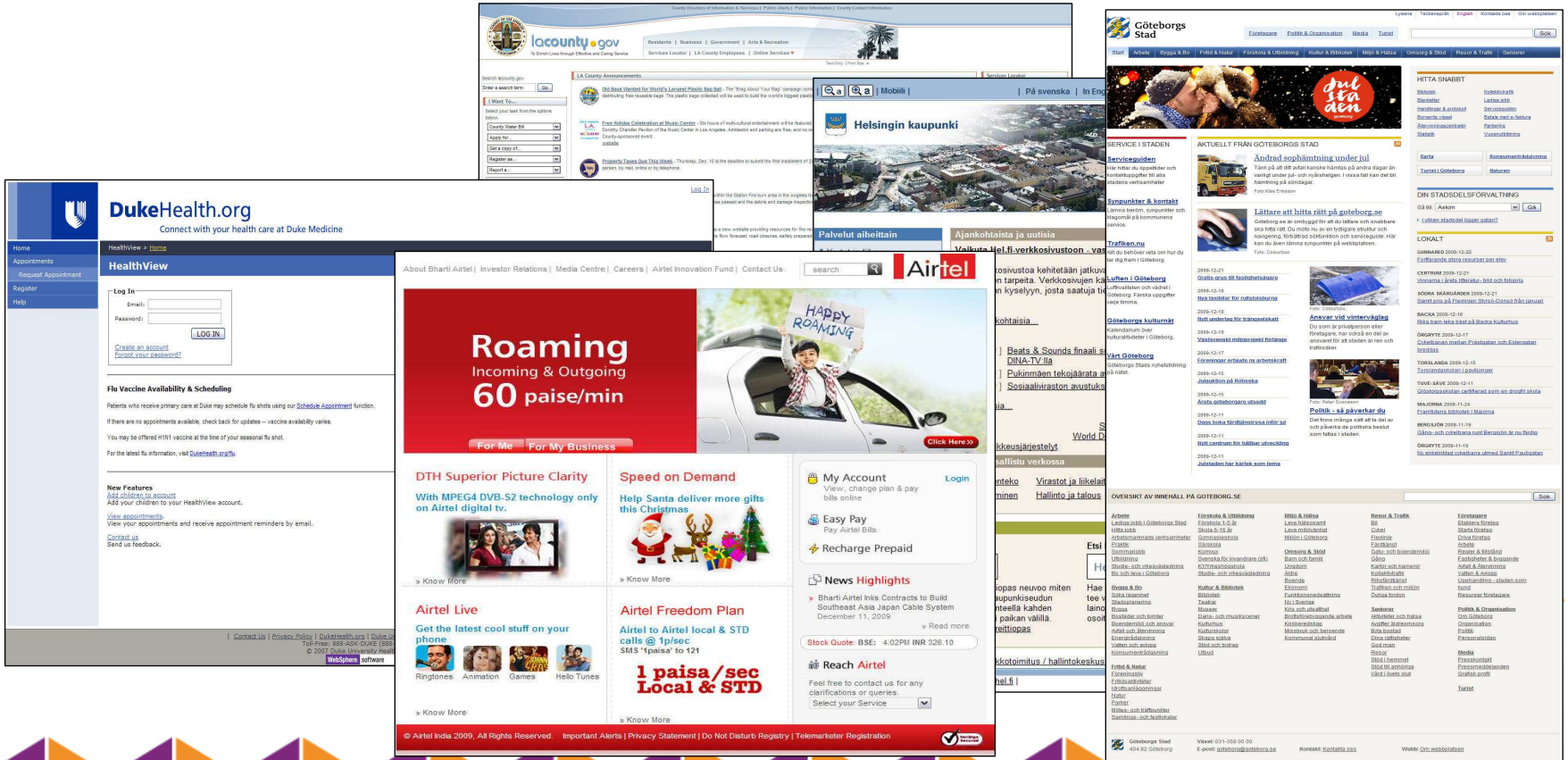
Customer Exceptional Web Experiences



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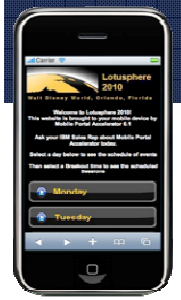
Catch the Wave of Possibilities

v6.1.5

Explore the latest WebSphere Portal user & platform optimization features

See how to extend your reach with Mobile Portal Accelerator Web experiences



v6.1.5

Discover how Lotus Web Content Management places more control of Web experiences in the hands of business users

Learn how to cut costs, improve efficiency with Lotus Forms

WebSphere Portal Now

Experience how WebSphere Portal NOW can jumpstart your next portal

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EXCEPTIONAL USER EXPERIENCE

SINGAPORE POLYTECHNIC SP

Business Challenge

- **Multiple technologies and backend legacy systems challenging to manage**
- **Lack of site visit due to the perception that the content is static and not personalised**
- **Students relationship with SP over the long term was declining**
- **No single gateway for Staff/Students and Teachers to access information and services in a consistent fashion**

Solution

IBM WebSphere Portal Extend

IBM Lotus Web Content Management (WCM)

IBM Lotus ActiveInsight

IBM Lotus Quikr and Lotus Connections

- Prior to the new solution, the Internet site was under utilised with minimal personalisation to students. After the Portal Solution was implemented, the Permanent Secretary of Education praised the school in for being the first institution in Singapore to deliver role-based, personalized services to its students.

Business Benefits

- **SP can now harness collective knowledge, foster innovation and promote social networking amongst the staff and student communities by adopting Web 2.0 applications**
-
- **Key performance indicators(KPIs) can be monitored. SP can now easily create and publish key performance indicators (KPIs), reports and related information to portal users**

- **SP can now effectively manage and publish content for authenticated Portal users for both intranet and internet sites**

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EXCEPTIONAL USER EXPERIENCE

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Demo

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