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Creating a Dynamic Portal Experience

IBM Software Group

- ▶ Welcome ladies and gentlemen to today's IBM webcast, "Creating a Dynamic Portal Experience." Today's webcast will be led by Christopher Crummey, the Business Unit Executive from IBM. Christopher has worldwide responsibility for selling and developing IBM's WebSphere Portal Solution, along with the other advanced collaboration portfolio of products. His topic of discussion today will be on the WebSphere portal experience. In this webcast, Christopher will focus on some of the key business initiatives and their corresponding functional aspects of the solution. And now, to begin our broadcast, let me introduce Christopher Crummey. Sir, you have the floor.
- ▶ All right. Jennifer, thank you very much. My name is Christopher Crummey and I'm a Business Unit Executive within the IBM Software Group. This will actually be the start of my 11th year here at IBM, and in today's webcast I'm going to talk to you about creating a dynamic portal experience.



Agenda

- Business Value of an Enterprise Portal
- WebSphere Portal Experience
 - Most Complete Portal offering in the market
- IBM Portal functionality and business value
 - Single point of access
 - Personalization
 - Collaboration
 - Web Content publishing
 - Customization
- Summary

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- ▶ The agenda for the next 30 minutes is going to start with the business value of an enterprise wide portal. We're going to talk specifically about IBM's WebSphere portal experience and its overall offering. We're going to drill down on specific functionality and its corresponding business value. Topics like single point of access, personalization, team collaboration, web content publishing, and the ability to customize. We'll end with a summary and that will basically take up this webcast.

Business Value of Enterprise Portal

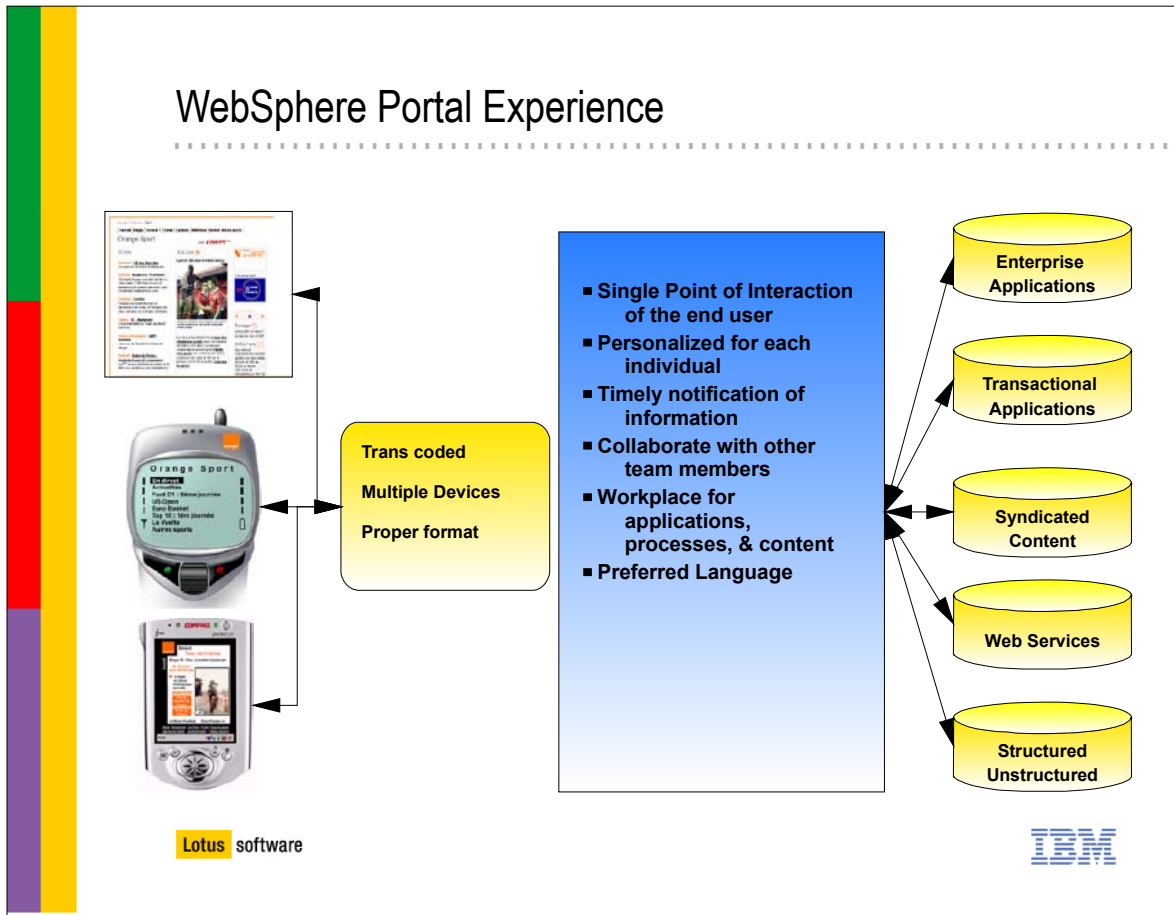
- Organized information
 - Targeted, more relevant
 - Infoglut, Info-famine, etc.
- Single sign-on
 - Fewer passwords, better user experience
- Common presentation
 - Consistent user interface
 - Pervasive access
- Unification of applications
 - New ways of accessing old applications
 - Remove Stove Pipe Applications
- Possible Desktop of the future
- Revenue benefits
 - Hard Dollars
 - Publishing
 - Travel, etc.
- Soft Dollars
 - Work force productivity
 - Innovation
 - Reduced cycle times
 - Customer Loyalty - Experience
- Cost Avoidance
 - Deployment of new applications
 - “Rail Road” Tracks

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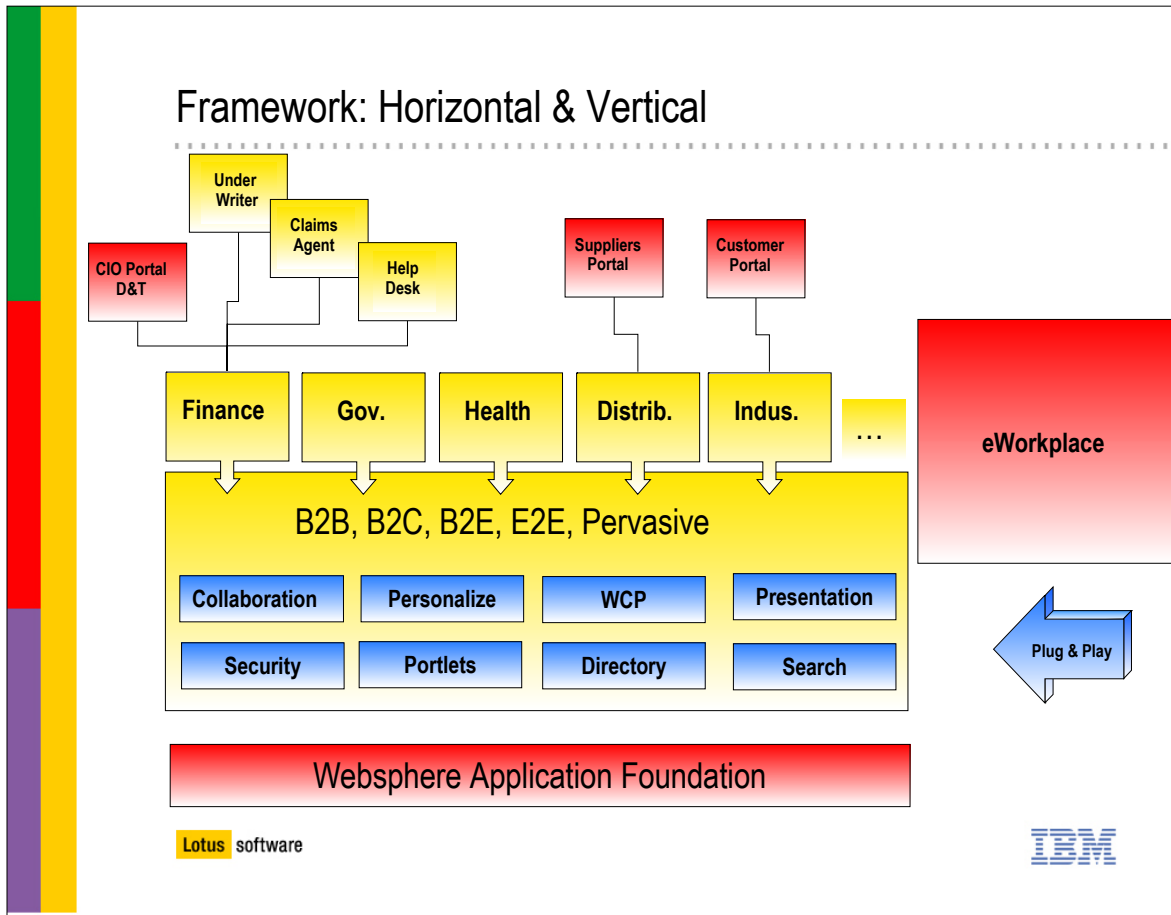


- Let's drill down specifically on the business values that our customers are seeing in an enterprise wide portal. One is its ability to organize information, to make it targeted, more relevant. There seems to be so much information existing inside of intranets and extranets. There needs to be a tool that allows you to organize and target individuals. This is specific because you need to target your HR employees, your sales employees, and each requires different sets of information. With the vast amount of applications that exist in a business to employee type portal, a lot of folks need a single sign-on mechanism and a portal offers that ability to provide a single sign-on and a better user experience. The portal also offers a common presentation layer, a consistent user interface, across these multiple applications. This user interface could also be your pervasive devices, your handheld devices. Besides organizing information, it also acts as a great unifier of different applications. A lot of companies are suffering from stove pipe type business units and applications. The portal actually goes across all of those departments, different stove pipe applications, and allows different users to share and retrieve different types of information. Some of the analysts even refer to the portal as the next desktop of the future. This is something that offers a lot of value to enterprises.
- Now, not only are there your tactical business values, but there are also revenue benefits to companies and I've divided that into a concept of hard savings. We use some of the collaborative technologies that exist inside of the portal to reduce travel. You can actually have e-meetings and and not necessarily pay for employees' travel. Some folks use the portal as a mechanism to publish new information and not actually have to publish hard documents. There is a lot of cost savings that goes along with that. Another concept is a soft dollar benefit, that's increased productivity, the ability to generate innovation across business units, reduce cycle times because I'm getting information faster and quicker, and that leads to a higher loyalty and a better customer experience, both internally and also customers externally, in a business to consumer model where your loyalty is increased due to the greater experience and greater amount of information focused and targeted towards you.
- Some companies are also using the portal platform as a way to justify cost avoidance and they do that by deploying new applications via portals rather than installing let's say a fat client on each desktop. Some folks will look at the portal almost as a set of railroad tracks that you can place applications on, and these railroad tracks touch all desktops. And allowing that you could put your applications via the portal onto those railroad tracks and deploy them to everyone.

WebSphere Portal Experience



► Now, let's take a different look at that concept through a graphical diagram here of a WebSphere portal interface. On the right hand side you have things like your enterprise applications, that's your Lotus Notes mail or your Microsoft Exchange mail, your SAP or Peoplesoft applications, your Siebel applications, maybe this would include your transactional applications, maybe even outside the firewall you can bring in your syndicated content, your application that leverages topics like web services, your structured data like your relational data, unstructured data such as presentations and press releases. Those can all be brought together in a single user interface, that information can be personalized, it can be done in a very timely fashion, you could use the portal as a type of infrastructure to collaborate with other team members, and even some of this content translated into some language of choice. As I move from the right hand side of this diagram all the way over to the left hand side, we also offer the ability to transcode into different device types and into proper format. Maybe the majority will be to the browser but it could also be done to the handheld devices.



As we move to the next topic one of the most important areas and value is the ability of the portal to offer a framework. And that framework is both horizontal and vertical. As you can see in the middle, we offer one framework to generate a B2B, B2C, B2E, E2E, and pervasive in a single framework. That is the horizontal concept. In the blue area you will see services such as collaboration and security, personalization, portlets, web content publishing, the directory, the presentation layer, the search engine. These are plug and play. If you have an existing search engine that can be plugged in. If you have an iPlanet or active directory or LDAP type of directory, a dominant directory, that can be plugged in there. You could use different security policies to be applied here. It's very much a plug and play model for this framework. As we move up this diagram you'll notice a very vertical framework, a financial oriented portal, a government oriented portal, a health, a distributed, an industrial type. So we have customers who are creating a B2B portal using this framework as a suppliers' portal, allowing them to have an e-relationship with their suppliers. Some folks are having a B2C and a customer portal. We have customers who are taking this entire framework and generating a custom portal such as Deloitte and Touche creating a CIO based portal. Now in terms of offering a B2E portal, this allows them to generate specific types of portals for each business unit. So, for example, the insurance industry, you can have the same framework offer portals, one for your underwriters, the same framework for different information for the claims agents, and then one for the actual help desk. So one framework offering the ability to generate both horizontal and vertical solutions. On the right hand side of this diagram is the topic of eWorkplace, and that is a term that we use here internally at IBM to represent the entire corporate intranet and the portal is the front end to that intranet. I'll talk more about that as we get closer to the end of this presentation.

Single Point of Access

■ Functionality

- Browser based - Single point of access
- Single Sign On - Global access
- Portlets - Windows to all major applications
- Access - Secure, filtered access to corporate data

■ Business Value

- Funnel and filter to the overwhelming information
- Make better designs when you have the right information
- Provide a common "desktop" with the proper tools that different jobs require
- Removing stovepipe applications and departments
- More Effective experience

The screenshot shows the IBM WebSphere Portal Server interface. The browser title is "SampleHomePage - Microsoft Internet Explorer". The page header includes "IBM WebSphere Portal Server" and the date "June 4, 2001 - 1:13 PM". The main content area is divided into several portlets:

- News:** "The Economist Headlines" with articles like "Cruel, or just unusual?", "Foreigners in their own land...", and "Could everything now go wrong?".
- Task List:** A table with columns "Action", "Description", and "Received". It shows two "Credit Request" items from May 5, 2001.
- Team Rooms:** "Architecture Board" and "My department" with a link to "Create a new team room".
- Documents:** "My Documents" section with "Security White Paper" and "Customer Presentation".
- Calendar:** A calendar for June 2001, highlighted with a red square. It shows the days of the week and dates from 3 to 30.
- Top Value Returns:** A table with columns "CustomerName" and "Value".
- Stock Quote:** "NYSE: IBM" with current price, change, and volume.

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► OK, let's drill down specifically into some of the functionality and business value of the portal offering and that first one is the single point of access. As I said earlier, it acts as this unifier of different applications. It is a browser based single point of access that gives you the ability to make the portal ubiquitous around the environment. I could log into any browser and get my customized information with a single sign-on. It also offers portlets and portlets are these windows into major applications. As you can see on the right hand side, I've kind of circled one of those with a red square showing me my personal calendar that exists inside my mail. These portlets can be as simple as rendering text and as complicated as a stand alone web application. They are a very powerful tool to componentize and bring forth the information that you are looking for. Not only can you bring forth and access your applications but these portlets allow you to filter so that I only get personalized content versus the entire view. Let's say I just want the documents that I need to do my job. Some folks look at the portal as the ability to funnel, filter the amount of overwhelming information that exists on some intranets and some extranets. It allows you to generate a common desktop with the proper tools for different business units and different folks to get the job done. This starts to remove the stove pipe applications and departments and overall generating a more effective experience.

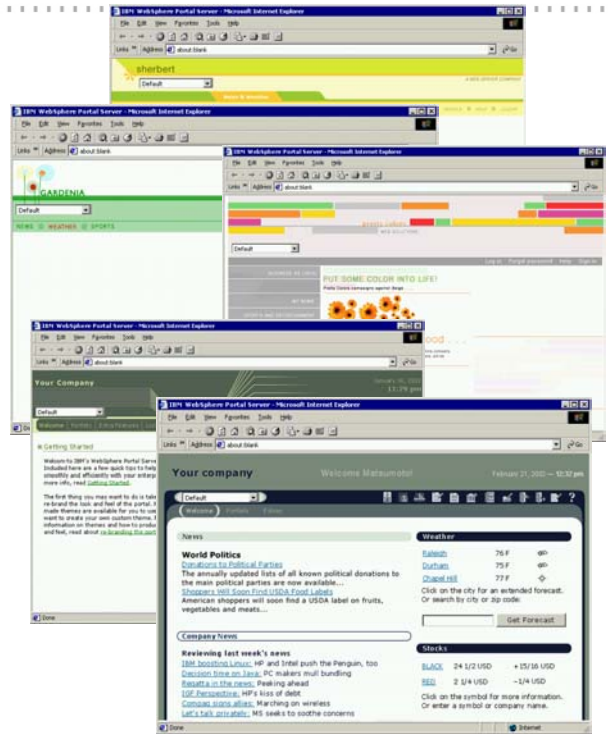
Customization

■ Functionality

- Themes - Apply an over all look and feel to your portal pages
- Skins - Apply an over all look to your portlets
- Navigation Models

■ Business Value

- Create "Branded" portal and page groups for different departments and Business units.
- Create "virtual" portals with in one portal infrastructure.



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- ▶ Let's move on to the next topic, and that's customization. The WebSphere portal offers in terms of function both themes and skins that provide different navigational models. Themes allow you to apply a different look and feel all across your different portals. As you can see on those images on the right, this is the same information with just different looks and feels. The themes and skins just apply to it automatically. This is important because it allows you to create a branded portal. Let's say the HR group needs to brand their own set of information, their e-HR portal, this allows different business units to do it, different departments to do it, it even allows you to create virtual portals in one infrastructure that goes back to the framework discussion we had talked about.

Personalization

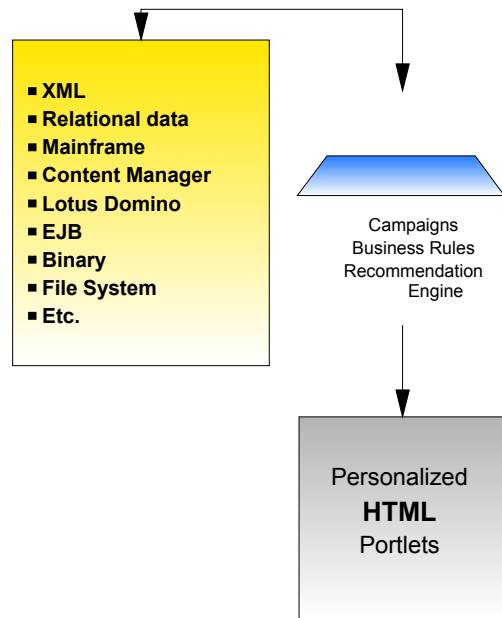
▪ Functionality

- Personalization Engine with ability to create Rules for triggering personalized content
- Tools - Campaigns, Business Rules, Recommendation engine
- Translated - Enterprise data translated to HTML and personalized to HTML and portlets
- Mail Campaigns - Provide custom mailings

▪ Business Value

- Provide content based on profiles, job, location, business rules, etc.
- Filter and personalize content for customers, business partners and employees
- Increase loyalty to portal / web site

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- If we take even a deeper look at the portal capabilities, personalization is one of the greatest strengths that we are providing here. The portal comes with a personalization engine. Not necessarily the ability to personalize the look and feel like we just talked about, but the ability to generate very specific personalized content. Now the personalization engine comes with some tools that allow you to do that. One is this concept of business rules. If $x=y$, then z . That allows you to generate that personalized html to the users, both inside and outside the firewall. It also comes with a recommendation engine. So for example if I generate a search and get my result set back, the recommendation engine will say, hey, other people that have done this search have also looked in these areas. Now if you look at the diagram on the right hand side, you will notice there's lots of different data types, xml, relational data, mainframe data, content manager, Lotus information, Microsoft information, etc. that can be run through this personalization engine and the results set is personalized html and personalized content within the portlets. This is very important. So you can see there's lots of content that exists that could be generated to the portal in a personalized manner. Not only can we translate this data but we can also offer mail campaigns. Not just html but also mail. So you can generate large custom mailings through this infrastructure. This actually allows the end user to get a filtered, personalized feel and increase the loyalty to perhaps not only the portal but to different websites.

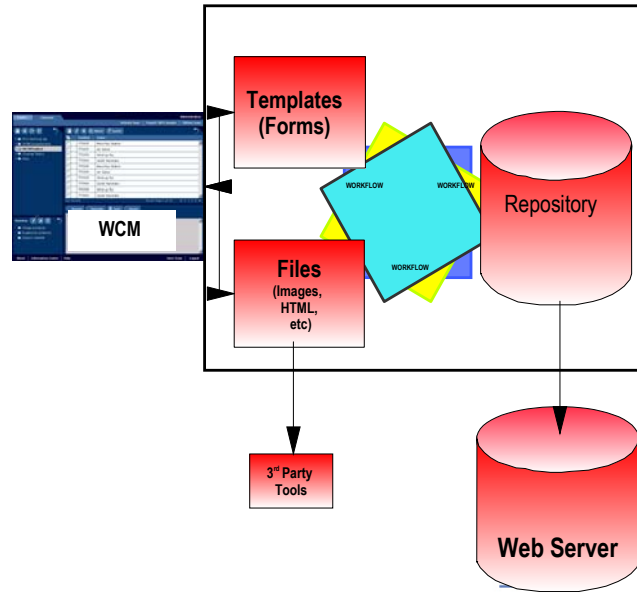
Web Content Publishing

▪ Functionality

- Web Content Publishing
- **Template based** - Template based content creation
- Integration - Integration with Industry Web Content players
- Workflow - Workflow and approval process provided
- Publish - Publish to portlets for review

▪ Business Value

- Dynamic content
- Provide out of the box Web content publishing with portal
- Cost savings
- Move to "Distributed" Web Content Publishing
- Provide approval process for content



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- ▶ One of the more important tools that a lot of customers have been asking for is web content publishing. They need to move the ownership of the content away from the web staff and to the content owners. So we provide inside of the portal a standard web content publishing engine that allows you to create content through templates, do workflow, and publish to your hp server of choice. So inside are a uon to generate template based content. It allows you to generate out-of-the-box publishing and moves this concept to a distributed publishing model so that it is more timely. The content of the website is more timely, there is no bottleneck for conversion. It's a very powerful mechanism to generate up-to-date and current information on the website, including the portal.

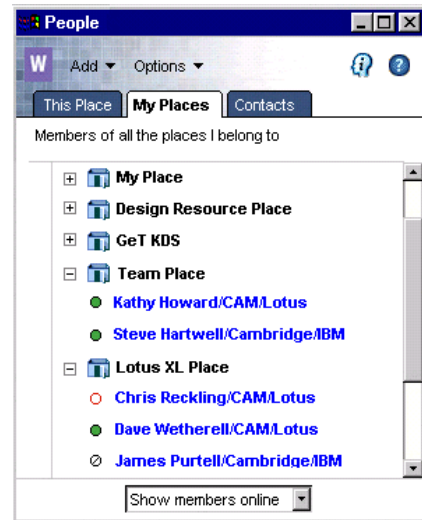
Collaboration

■ Functionality

- Instant Messaging & Awareness - IM with team members
- eMeetings - Via a browser, users can "white board", "Application Share" either side of firewall.
- "Lotus Places" - Secure web based "community" to organize related tools, content, and team members.
- QuickPlace - Web based tool added to "Lotus Places" that provides rich functionality

■ Business Value

- First portal offering that provides "Contextual Collaboration"
- Moves away from the individual to Teams
- Provides both "View" & "Act"
- Higher increase in productivity
- Hard Dollar savings



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► As we move on to the next area, and this is an area that is extremely powerful, and that is the area of collaboration. A lot of what I've talked about previously, a lot of the other functions, are very much based on an individual. And we realize that enterprise wide portals, corporate portals, and collaborative portals and commerce-based portals deal with more than just individuals, they deal with teams and other people. So embedded within this WebSphere portal is a lot of collaborative functionality. One example is instant messaging and awareness. This allows you to instant message with colleagues and team members, with people outside your company. Not only do we provide instant messaging and awareness but we also provide the ability to generate and participate in e-meetings. So, via a browser, no software installed, the user can actually white board diagrams, do presentations, do application sharing on either side of the firewall. Now we have actually done some studies here at IBM and asked IBM employees and other customers, where do you get the best information, and from where? And actually what came back was, the intranet and your team. So we said why don't we bring those two together and generate communications around those sets of information. So included inside of the portal is these things called places and these are secure web-based communities that allow you to organize related tools and content and portlets with the team members. One of those tools is called Quick Place. It provides calendar functions, workflow functions, and discussion threads around these communities. Very powerful. This provides a higher and increased productivity among the individuals, stops the reinvention of the wheel every time a topic or a document needs to be created. There's a lot of hard dollar savings here when people do not need to travel, when they can actually generate content faster. A very very powerful concept in the portal.

IBM's Portal Offerings

- Three Offerings
 - Pick a solution to meet your requirements
 - All use the same framework
 - CPU Based Pricing with license restrictions on some components
- Extensible solution
 - WebSphere Translation server
 - Lotus Discovery server
 - WebSphere Commerce
- IBM Business Partners
 - Over 60 ISVs and growing!
 - BackWeb, I2, Vignette, Interwoven, Stellent,

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Experience

- Tivoli Policy Director (Global SSO)
- IBM Content Manager (EIP Client)
- Lotus Sametime (eMeetings)
- Lotus QuickPlace (Team Spaces)

Extend

- Lotus Places (Communities)
- Lotus Collaborative Components
- Federated Search Broker
- Web Site Analyzer

Enable

- Portal Server
- Personalization
- Web Content Publishing
- Search Engine
- WebSphere Studio
- WS Application Server

As we take a look at the larger offering, the IBM WebSphere portal family is made up of three moving pieces, the enable, the extend, and the experience. They all use the same framework, you can kind of pick and choose which one meets your needs, and they are based on CPU pricing, so that it can scale to the large enterprise. We also could make this an extensible solution, you could add on to this particular portal offering a KM solution such as the Lotus Discovery Server, or tie it in to the WebSphere Commerce Server, or increase the performance with a WebSphere Edge Server, or translate content with the WebSphere translation server, or even offer third party products to make it an extensible plug and play solution. Now, the momentum around the portal has just taken off in the last couple of months with the signing of 60 plus more business partners and ISVs that want to make the WebSphere Portal Offering part of their particular solution.

Summary

- Most "Complete" portal offering on the market
 - Portal - Personalization - WCP - Collaboration - Security -etc....
- Business Partners - Market Momentum
 - Providing a lot of value to family of offerings
- Leadership role in development and deployment of Open Standards
- Larger "eWorkplace" eBusiness Strategy
- Leadership role in fundamental areas of infrastructure (Magic Quadrants)
 - Web Services
 - Portal
 - KM / Collaboration
 - Infrastructure / Middleware
- Result = Significant Business Value for your e-Business
 - Increased employee productivity
 - Improved customer loyalty
 - Lower cost of portal deployment

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- ▶ If we kind of move to the last slide and deal specifically with the summary, these are some of the things I want to walk away with. One is, I want you to realize how complete the portal offering is in comparison. We start with the portal, we offer personalization, we can expand out with content publishing, we can collaborate with teams and take it all the way out and provide a global single sign-on and security model. It's a very complete portal offering. As I mentioned previously, there's a lot of momentum in the market around this family of offerings. A lot of our partners, our Interwovens, our Documentums, our SAPs, our Siebels, the major players in the markets in these different areas are providing value to this family.
- ▶ Another important thing to remember is that not only are we providing a leadership role in the development of open standards but we are also deploying those open standards within the WebSphere Portal Family. Open standards like the J2EE architecture, Web Services, Java, etc. are all natively a part of this portal solution. That's important because as you move down the line of deployment and extensibility, that provides lower cost of ownership using the open standards.
- ▶ As I said earlier, the IBM portal is a part of IBM's larger eWorkplace business strategy so the portal is actually being deployed as the front end to the entire corporate intranet that we call eWorkplace here at IBM and there's been some very fascinating ROI studies on the amount of money that we've saved using the portal to be the framework to offer our eHR and our eProcurement and our eLearning through the global campus etc. Now from an industry point of view, the analysts have basically come up with some of these magic quadrants and these other things to put things into perspective and the nice thing about the IBM portal offering is that IBM has a leadership role in the majority of those magic quadrants, the web services quadrant, the portal, the KM infrastructure, the collaboration, the middleware. That basically shows a leadership role in fundamental areas that are required to deploy portals. As a result, there is a significant business value for the eBusiness, you have increased employee productivity, you have higher customer loyalty, and overall a lower cost of portal deployment.

Where to find other information?

WebSphere Portal Family Sites:

Home Page <http://www.ibm.com/software/webservers/portal/>
Portlet Catalog <http://www.ibm.com/software/webservers/portal/portlets>
Developers Home Page
<http://www.developer.ibm.com/welcome/websphere/wps/index.html>
Portal News
<news://news.software.ibm.com/ibm.software.websphere.portal-server>

WebSphere Host Integration Sites:

Home Page <http://ibm.com/software/webservers/hostintegration>
Portlet Demos <http://websphere.dfw.ibm.com/whidemo/>
Library
<http://www.ibm.com/software/webservers/hostintegration/library.html>

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