



IBM Lotus Optimizes User Productivity with *Notes* and *Workplace* Client Enhancements

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Management Summary

The focus of any business is on optimizing its productivity. Part of this productivity comes from using technology in various forms, but a significant part of it comes from the people who work there. People sell the products and services (either in person or through marketing campaigns and then support the customers). People make the strategic and tactical decisions that keep the enterprise on a productive path. A single tool cannot optimize these people-tasks. Blackberries or spreadsheets have value, but also limitations. If your work consists of evaluation, spreadsheets are great, and if it is dealing with logistics, a calendar is imperative. Most jobs also involve decision-making, which cannot be reduced to a value on a grid, or a quarter hour in that open space on Tuesday afternoon, but instead involves various sources of context-specific information, depending on the decision to be made.

Ever since the days when secretaries stood at desks and wrote longhand, the workplace has been consolidating and reorganizing in search of both efficiency and effectiveness. With technology, in the form of telephones, typewriters, and computers, the *how* of business process has been refocused, often, on *how fast*? The *what* that is done by workers has also changed, but its importance has not. It is the human touch-points that let that let the *fast* provided by technology be safely steered and modified to business advantage. Seasoned workers can recognize when something is amiss, and spot trends before they are measurable as metrics. Business success may be found in scale and optimization, but the successful *evolution* of a business depends on the intelligence of those familiar with its processes – and the ability of their workplaces to let that intelligence be actionable.

IBM's Lotus has offered a collaborative environment for years, and has millions of users around the world. *Notes* and *Workplace* have to comprise portals, applications, content feeds, IM, presence awareness, and a full plethora of capabilities. Clients of both applications can be configured to fit various roles, allowing them to be used on limited-function or occasionally-connected devices as well as the standard, always-connected desktop. With the current and future versions of Lotus *Notes*, and a new *Workplace* product, IBM offers considerable new functionality in its links to SAP. IBM also offers Open Document Format (ODF) Editors – within the current *Workplace* managed client, and as a core component of the next major release of the *Notes* client, due out early next year. These enhancements let workers do more with SAP, and more with the traditional presentation forms of their information.

These improvements are great, but, since the focus of this offering is squarely on human productivity, there is a huge requirement that comes with it - it must do no harm. For more details, please read on.

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First, Do No Harm

For many enterprises confined to a thin edge of profitability, maintenance of productivity is a matter of survival – a true example of the term, *mission critical*. SAP is a highly-evolved, massively-extensive business information system used by many large enterprises, and hundreds of thousands of Lotus users. It is typical of the comprehensive, enterprise-class software that underlies many businesses of any size or geographic spread. SAP-using enterprises are looking for better integration of their workplace environments with SAP, so that workflows can be better integrated, can change, and can go even faster. Because of their existing system efficiencies, this desire, like so many adult desires, comes with some caveats.

- **The new capabilities must work with the versions of SAP that an enterprise has.** Often this is not the latest version, at least not everywhere. The new Lotus Notes client works with versions of SAP back to SAP R/3 4.6c, and also supports *SAP NetWeaver*.
- **The new capabilities must not involve retraining, or too many unfamiliar elements on the user interface.** Lotus has kept a consistent client topography.
- **The integration and consequent process automation must be done in a way that lets business processes be *persistently visible, properly regulated, and able to be further evolved*.** Information should be integrated in context - to become part of, secured, and regulated by the process. This is where the inclusion of ODF Editors gives some intriguing capabilities. (More later.)
- **The new capabilities must be available for the entire environment, including mobile workers, from the outset.** Beyond a pilot implementation, business capabilities not pervasively shared become a hindrance and source of rancor, not a business benefit. Accordingly, Lotus Notes is now available for Blackberries, and a number of smart phones via a partnership with Good Technologies.
- **The new elements must be something that their developers can work with, using a full set of familiar tools.** Lotus' *Workplace Managed Client* is now based on Eclipse,

and the 2007 release of the *Notes Client* also will be based on Eclipse. The open-sourced Eclipse IDE has a full tool set and a massive user base.

- **The new elements must come at a reasonable cost.** The new IBM Lotus Notes Access for SAP Solutions will be free to IBM Lotus *Notes/Domino* customers. For new customers, it will be available at a price competitive with other alternatives.

Lotus Notes 7.0 ♥ SAP

To an enterprise, the working environment matters – not just that of the senior executives, who design the strategy, but of workers whose experience gives evidence on which strategy is built. This includes call centers, sales, and delivery forces, with their insights on the customer base. It includes production, with their insights on what is feasible, and the financial and analytical folk who say what will work financially and be successful. The digital workplace must be able to be deployed in all these places, and connected in a way so that people can work together.

IBM Lotus has a long heritage of supporting workplace collaboration. Over the years, it has expanded the capabilities of its Notes client and added a browser-based version.

Last year IBM announced a Dynamic Infrastructure initiative to leverage SAP's *Adaptive Computing* approach, improving the hardware support (including non-IBM hardware) of IBM-SAP deployments. IBM also acquired a myriad of capabilities to enhance what content can be offered to workers and how. Two examples are *IBM Workplace Forms*, which came with the PureEdge acquisition, and *IBM WebSphere Information Integrator Content Edition*, which came via Venetica. Many modules for industry-specific workflow have been developed, deployed, enhanced, and hardened.

Now, as part of its *Project Harmony* initiative, IBM feels it is time to time to flesh out the front end of the IBM/SAP integration. *IBM Lotus Notes Access for SAP* solution offers a fuller integration with SAP within the *Notes* client. *IBM Workplace for SAP* software offers SAP integration with IBM's *Workplace* Web-centric collaborative tools. Both solutions

give a single interface for both business process and related tasks, like deadline management, meeting scheduling, and reporting. Lotus also integrates with other enterprise applications, and provides a place to integrate the user experience of key applications that are key to human productivity. You could think of it as a service-oriented workplace, with all the elements and information you need to do your whole job aggregated at your fingertips.

Lotus Notes 7.0 ♥ ODF

The inclusion of Open Document Format (ODF) Editors will be, over time, a game changer. ODF is open source, and the XML schema that it uses to format its documents and spreadsheets are all standard and addressable. This has two values.

First, the standards will be maintained indefinitely going forward, giving the ability to open a document or spreadsheet twenty-five years from now with an application other than the one from which the spreadsheet or document was created. This capability is mandatory in businesses such as health care or law, where a customer relationship can span many decades. The Commonwealth of Massachusetts has mandated the use of ODF exactly for this reason. It has become untenable to print out information to paper for long-term retention, but it is also unrealistic to imagine keeping a litany of applications and hardware of various vintages simply to read back files.

What is more intriguing, if less immediately leveragable, is the ability to parse the schema of a document and extract relevant information for additional use, all without today's paper-emulating litany of open, copy, and paste. Many business workflows could use information more precisely, and, with good search and deft automation, present workers with a more complete set of the information-in-context they need to accomplish a particular task. The completeness of this set is not a matter of the vision of some IT guy in the data center, but an instantiation of what a worker knows he or she needs to do a particular job. The *Lotus Notes* and *Workplace* clients support this kind of self-service¹.

Other software vendors are also moving away from the emulation of paper and x-ray film to a more parsable approach to information, but Lotus is first to market. When combined with the heritage of collaboration and the comprehensive integration-on-the-glass of all the components needed to support a role-based workplace, IBM gives workers a lot to work *with*. Search, indexing, and classification (all part of the *Lotus Notes* and *Workplace* clients for some time) have given us new ways to use and reuse information, beyond narrative and spreadsheet. Various standards for information objects offer the promise of making information secure, appropriately confidential, and eminently usable beyond the bounds of the application that created it. It is time for every enterprise to start playing around with the *what-ifs* that such capabilities make possible. What if you could macro with classes of information as easily as you manipulate the columns of a spreadsheet? What if you could address information security and information retention periods in a similar fashion?

Conclusion

The new IBM Lotus Notes and Workplace clients are very good news. With all the power, speed, and momentum that technology has given us, the human hands on the reins were never more important. IBM gives its customers new ways to do business better.



¹ IT systems will still control authentication and data access. However, with the new ability to use information as information, not just as an emulation of paper, the

collaboration between workers and IT will have more common concepts with which to work.

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