On Demand Insurance Business Problems

1. We lose customers because we process new policy applications too slowly.
2. Our claims processing is time-consuming and inefficient.
3. We need to do a better job of attracting new customers.
4. We need our employees to be more productive.
5. We need to grow revenue in existing accounts, and by partnering.
6. Our development teams are always behind schedule and over budget.
7. We need to gain maximum efficiency out of our IT infrastructure.
Current Situation

- Recent customer survey results indicated frustration with the claims-handling process.

- Customer Service Representatives (CSR) were unable to fully address customer questions and concerns about their claim during initial call.

Challenges:
- Claims process requires knowledge of and access to multiple disparate systems and applications.
- Customer claims data is fragmented across different systems.
- Some questions require the CSR to interact with colleagues.

Using A Portal To Help Improve Customer Satisfaction and Responsiveness

How can we enable our Customer Service Representatives to be more responsive to customers?

Build a Customer Service Representative portal using IBM WebSphere Portal.

On Demand Insurance CIO

IBM
Portal Concepts: It’s About User Interface and Integration

User Interface
- A UI framework for integrating applications, content, and processes “at the glass”
- Includes additional infrastructure like search, single sign-on, personalization, customization, navigation, etc.

…and Integration

Portal Pages and Portlet Concepts

- Portal pages are containers for individual portlets
- Each portlet on the portal page is a separate application
- Portlets are developed, deployed, managed, and displayed independent of other portlets…
- …but they can also communicate and exchange data with each other
- Users can place portlets anywhere on a page
Portlet Development

- Portlets can have different modes and states
  - Minimize, maximize, edit, help etc.
- Portlets can support multiple devices
  - Browsers, electronic organizers (PDAs), phones, voice, etc.
  - Unique views can be developed for each device
  - Business logic can be shared across the different views
- Portlets can be developed in several ways
  - Some require programming
  - Others can be produced with little/no coding using portlet builders

Key Benefits Of A Portal

For the User…

- Improved productivity by delivering interactive and personalized access to applications, processes, and people

For the Developer…

- Separates site design, site/page assembly, and administration from application design
### IBM WebSphere Portal Functional Architecture

#### Collaboration Services
- Mail / Calendaring
- IM / Presence Awareness
- Web Conferencing Portlet
- Team Workspace

#### Content Services
- Web Content Management
- Document Management
- Content Repository
- Productivity Components

#### Integration Services
- Application Integration
- Business Processes
- Web Clipping
- Web Services
- Mainframe Integration
- Content Integration

#### Framework Services
- Portlets
- User Interface Customization
- PZN
- Virtual Portals
- Security
- Admin
- Mobile

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### DEMO: Customer Service Representative Portal

A tree fell on my house and I recently submitted a claim. I need to follow up and ask some questions.

No problem. How can I assist you?

Customer

Customer Service Representative
1) I need to change my billing address
2) I need to find out the status of my claim
3) I need to know if my household goods are covered under my policy

What Did We Just See?

- SAP Portlet: Lookup customer in Customer System
- Web Services Portlet: Update address in Billing System
- Data Access Portlet: Access claim history
- Collaboration Portlet: Locate expert, ask question
- Document Manager Portlet: Lookup policy document
Access Enterprise Applications and Databases with No Coding!

**WebSphere Portal Application Integrator (WPAI)**

- Provides a framework for rapid creation of portlets with connectivity to back-end applications
  - Enterprise Information Systems like SAP, Siebel, Peoplesoft
  - Relational databases like DB2, Cloudscape, Oracle, Informix, MS SQL Server

- Consists of:
  - Portal-based tooling (Application Portlet Builder)
  - Runtime portlet (generated from Portlet Builder)
  - Mediator Framework and Mediators (SAP, Siebel, Peoplesoft, JDBC, etc.)

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**How WPAI Works**

Portlet Builder

- Builds portlet (JavaServer Faces-based)
- Portlet Runtime

Portlet Runtime

- Portlet Builder
- Mediator Framework

Mediation Framework

- SAP Mediator
- Siebel Mediator
- Peoplesoft Mediator
- JDBC Mediator

Common interface for discovery and retrieval of data

Mediators connect to back-end using native API and convert data to common format (Service Data Object)
DEMO: Building the SAP Portlet

What's needed
- Visual Studio.NET
- SAP .NET Connector or BizTalk Server
- An understanding of BAPIs/RFCs

Best practice: application server approach

Synchronous Applications

How SharePoint Portal Connects to SAP

Deep SAP knowledge needed plus you write lots of code!

Source: IBM SWG Competitive Project Office, 2005
How SharePoint Portal Connects to Siebel

**Synchronous Applications**

- **What’s needed**
  - Visual Studio.NET
  - Siebel 7.5.2 Web Engine (SWE) or BizTalk Server
  - An understanding of sXML (Siebel XML)

- **Best practice: application server approach**

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**Source:** IBM SWG Competitive Project Office, 2005

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What Did We Just See?
Web Services Enablement

- Applications that have been exposed as Web services can be rendered in a portlet with little to no coding.

- Wizards allow the user to:
  - Search/identify location of Web service
  - Retrieve its Web Services Description Language (WSDL) document
  - Select which operations to perform
  - Automatically generate the corresponding portlet

- Rational Application Developer includes a complete development environment for turning existing programming artifacts into Web services and generating the appropriate portlets.
  - E.g. turning CICS request into a Web service/portlet

What Did We Just See?

- CSR Portal
- Collaboration Portlets
- Data Access Portlets
- Web Services Portlet
- SAP Portlet
- Customer Service Representative
- SAP customer in Customer System
- Update address in Billing System
- Access claim history
- Locate expert, ask question
- Lookup policy document
- Lookup document
Data Access

- JDBC portlet builder creates data access portlet with no coding
- Can also access multiple data sources in a single query
  - WebSphere Information Integrator (separate product)

What Did We Just See?

- Customer Service Representative
- SAP Portlet
  - Lookup customer in Customer System
- Web Services Portlet
  - Update address in Billing System
- Data Access Portlets
  - Access claim history
- Collaboration Portlets
  - Locate expert, ask question
- Document Manager Portlet
  - Lookup policy document

Collaborative Portlets

CSR Portal
Collaboration Center

- Portal page that brings together multiple collaboration tools into a single user interface
- Consists of pre-built portlets that can access various IBM Lotus Domino collaborative services running on back-end servers
  - IBM Lotus Domino Web Access (Mail, calendar, etc.)
  - IBM Lotus Instant Messaging Contact List
  - IBM Lotus Web Conferencing
  - IBM Lotus Team Workplace
  - IBM Lotus Domino Document Manager
  - NotesView
- Also includes two additional portlets to make it even easier to find “experts” and see if they are online
  - People Finder
  - Who is Here?

People Finder Portlet

- Directory search application for the portal
- Search for users in a corporate LDAP directory
- Facilitates finding people based on areas of expertise, background, etc.
- Multiple views of the information
- Out of the box schema supported - inetOrgPerson
- Supports customizable queries and user interfaces
- Integrated People Awareness
- IBM Lotus Domino 6 can support pictures
- Already configured on install
Gain Additional Value From Your Domino Investment with No Additional Coding!

- **NotesView Portlet**
  - Display user’s Mail, Calendar, To Do list, etc.
  - Displays any view in any database
  - Wizard-like Edit mode helps users define the portlet
  - Can launch Notes client instead of using the browser

- **Portlet Builder for Domino**
  - Allows users to develop a portlet that can access/manipulate data in Domino
  - Provides a portlet-based tool to build Domino portlets
  - Views do not retain any of Domino’s presentation

- **Domino Application Portlet**
  - Allows Domino web application to be surfaced in a portlet
  - Leverages investment in presentation from the Domino application in addition to data
  - Insures that all client requests go through Portal (Reverse Proxy)

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What Did We Just See?

Customer Service Representative

```
<table>
<thead>
<tr>
<th>Cooperative Portlets</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSR Portal</td>
</tr>
<tr>
<td>Web Services Portlet</td>
</tr>
<tr>
<td>Data Access Portlets</td>
</tr>
<tr>
<td>Collaboration Portlets</td>
</tr>
<tr>
<td>Document Manager Portlet</td>
</tr>
<tr>
<td>Lookup policy document</td>
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<td>SAP Portlet</td>
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</table>
```

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D1 - 10 Improving Productivity.ppt 25

D1 - 10 Improving Productivity.ppt 26

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Portal Document Manager

- Repository for documents that can be grouped into business-relevant categories ("folders")
- Supports multiple document types (e.g. text, image, URL)
- End-users can search, categorize, view, edit, and share documents
- Uses Access Control Lists for assigning viewing and editing rights
- Built-in workflow for approval processing
- Supports versioning
- Supports People Awareness (e.g. see if author online, initiate chat)
- Supports native editor round-trip editing via browser plug-in
- Integrates with Productivity Components for browser-based viewing and editing of documents

Productivity Components

- Provides viewers for documents without having to have native editors installed
- Also includes browser-based editors for creating new documents or modifying existing ones
  - Rich text editor
  - Spreadsheet editor
  - Presentation editor
- Editors provide most common features of typical productivity tools
- Conversion between native and portal document formats handled by built-in document conversion services
Cooperative Portlets Help Improve User Productivity

- Cooperative portlets subscribe to a model for declaring, publishing, and sharing information with each other using the WebSphere Portal property broker
  - User no longer has to use cut-and-paste between screens

- Portlets subscribe to the broker by publishing typed data items, or properties, that they can share, either as a provider or as a recipient

- Delivery Methods
  - Click-to-Action
  - Wiring
Comparing Cooperative Portlet Development

- SharePoint Portal
- WebSphere Portal

- Select Web Part template
- Write lots more code
- Development steps are not intuitive

- Use wizard to generate Click-to-Action enabled portlets
- Write some code
- Easy user-driven path or use wiring portlet to connect them together

Source: IBM SWG Competitive Project Office, 2005

Building and Deploying the Customer Service Representative Portal

Great job on the CSR portal. How did you build it and get it deployed so quickly?

IBM’s portal and portlet development tools made the task a lot easier.

On Demand Insurance CIO
On Demand Insurance IT Manager
Role-Appropriate Portal Tools Make Everyone More Productive

- Visualize create portal site, portlet pages, portlets, test & debug, deploy portal
- Rational Application Developer v6 includes first-class portal develop/deploy environment

Developer

- Create business-specific portlets with no coding
- WebSphere Portlet Application Integrator (portlet builders)

Business User

- Customize and configure portal layout; add new pages, portlets
- WebSphere Portal built-in customization utilities

End-User

Rational Application Developer Supports End-to-End Portal Development

1. Create or Import Portal project
2. Customize theme/skin/layout/navigation
3. Deploy Portal project
4. Test theme/skin/layout/navigation
5. FTP or Copy files (wps.war)
6. Execute XML access command
7. Page Designer & CSS Designer (Theme/Skin JSP Editing)
8. Portal Designer (Layout Editing)
9. New Portlet Wizard
10. Importing or Creating portlets
DEMO: Building the ODI Customer Service Representative Portal

Rational Application Developer v6

CSR Portal

Portlet Development Comparison

Visual Studio.NET

- Select Web Part template
- No visual Web Part development
- Write lots more code
- No test harness, no .NET deployment mechanism

Rational Application Developer v6

- Use wizard to generate feature-rich portlet skeletons
- Visual portal/portlet development
- Write some code
- Test/Preview prior to deployment

Source: IBM SWG Competitive Project Office, 2005
Use WebSphere Portal Catalog To Find Inventory Of Pre-Built Portlet Solutions

- 1,800+ solutions and services
- 300+ ISVs developing portlets

http://catalog.lotus.com/wps/portal/

Increasing Business Benefits By Building New Portals

Our sales department wants us to build a customer portal and allow people to apply for policies online. Let me show you how IBM WebSphere Portal can handle that too.

On Demand Insurance CIO

IBM
New Requirements For The Customer Portal

**Personalization and Content Management**
- Sales
- Marketing

**Business Process Integration**
- Risk Assessor
- CSR
- QA Clerk

**Multi-Site Portals (Virtual Portals)**
- Optimize Apply for Policy process and ensure that the tasks get to the right people at the right time
- Leverage existing CSR portal infrastructure to minimize costs and administrative overhead

**IBM WebSphere Portal v5.1**

**DEMO: ODI Customer Portal**
Building the CSR and Customer Portal Solutions with IBM WebSphere Portal

Web Browser
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Customer Service Representative Portal

Web Browser
---

Customer Portal

Pervasive

Custom Mobile Portals

WebSphere Everyplace

WebSphere Portal Server v5.1

Integrated Business Process Engine

Integrated WebSphere Application Server

Custom Task Portlets

Collaboration Center Portlets

IBM Lotus Domino Server

What Would It Take To Build These Portal Solutions Using Microsoft Tools?

Add custom coding, integration, massive server farms…and you still have limitations…

Source: IBM SWG Competitive Project Office, 2005
Microsoft Portal Solution Limitations

- Hybrid nature of SharePoint technologies (COM and .NET) can potentially lead to inconsistent and poorly integrated security
- No document-level security in SharePoint (deprecated from 2001 release)
- No support for offline use in SharePoint
- No integrated multi-channel or multi-device support
- No support for on-the-fly language translation
- Limited personalization capabilities
- Limited support for portal, portlet development

Source: IBM SWG Competitive Project Office, 2005

Prudential Insurance Chose WebSphere Portal

- WebSphere Portal provided a single platform for integration across 10 applications from 9 departments providing policyholders access to updated account information in real-time and across products
- Currently supports:
  - 300,000 registered use
  - 8,000 unique visits a day
- “From our highly available Web portal, customers can tap an array of information resources to plan their finances. And the big payback for Prudential is moving transactions out of the call center and to the Web site—resulting in a significant year-on-year reduction in call volumes.”
  - David Kennington, Prudential, VP of IS