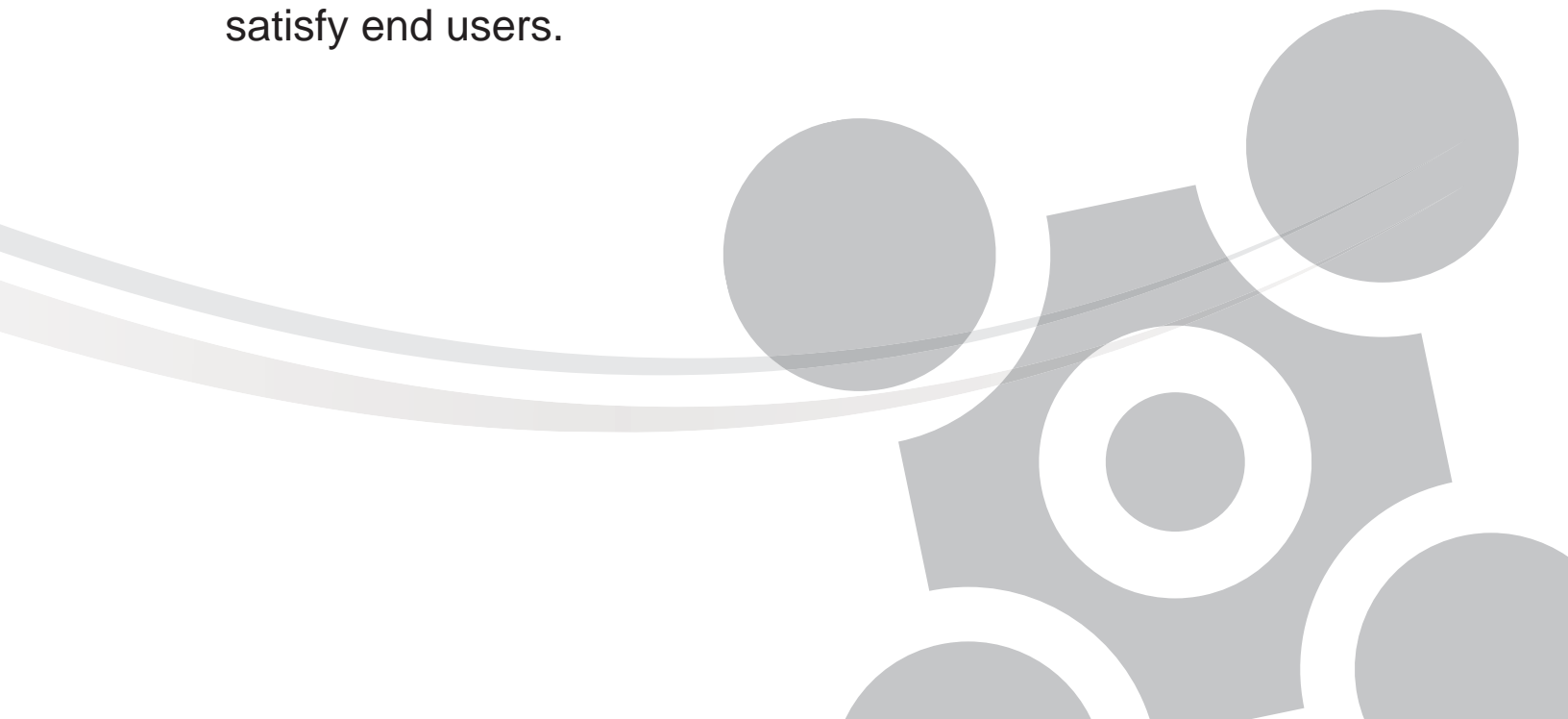


ENTERPRISE PORTAL

An enterprise portal is a secure, customizable, browser-based interface that provides users with access to a range of information sources, allowing them to interact directly with the information—anytime and anywhere.

When designed and developed well, enterprise portals deliver a significant return on investment through increased efficiencies and productivity, while simultaneously enhancing the ability of IT departments to consolidate and streamline processes and satisfy end users.



Harnessing Portal Power

Best practices make enterprise portals the right answer for your business needs.

If you're a sales rep, you need access to previous sales, balances, past activities, and current account information for all of your customers. You also want access to hot leads from your vendors and partners. And it helps to have ESPN on the same screen so you can talk sports with prospective customers.

No matter what different communities of users need, portal technology delivers the best answer yet to the single question everyone asks: What's important to me?

ACCESS TO INFORMATION

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When designed and developed well, enterprise portals deliver to business managers a significant return on investment through increased efficiencies and productivity, while simultaneously enhancing the ability of IT departments to consolidate and streamline processes and satisfy end users. (See Key Benefits, below.)

That said, the crescendo of enthusiasm for portals, along with an explosion in portal-building tools in recent years, has launched scores of portal projects that have failed to live up to expectations.

For example, Logicalis has seen portals that let the wrong people into all of the right places; that freeze up in the middle of performing a critical function; that work great at a small level, but won't scale; that can't be centrally managed or backed up; that look elegant, but don't do much; that started with a bang and ended with a whimper.

They may look deceptively easy to build, but risks are involved. Portals that live up to expectations require the same discipline of any software development project, as well as a broad range of skills that are not always easy to come by.

After years of being called on by clients for portal projects that needed fixing, Logicalis developed an Enterprise Portal Practice that applies the basic principles of Rapid Application Development (RAD) with best practices and hands-on experience, guaranteeing that every portal development project is a success. (See 10 Best Practices for Better Portals, page 5.)

TECHNOLOGY INDEPENDENCE

One of the keys to a successful enterprise portal project is to begin with an approach that is technology-independent.

“Too many portal projects are technology-driven,” says Logicalis Vice President of Consulting Services Shaun Olsen. “Successful enterprise portal projects are driven by a strong methodology and a clearly defined sense of purpose. The technology can be whatever is most compatible with your IT environment.”

At the beginning of a portal project, it is more important to assemble the key stakeholders—IT managers, business managers, and end users—and draft a requirements list that identifies the specific functionality that the portal will need to provide. The choice of technology should be determined by the requirements list, not the other way around.

Putting together a requirements list involves much more creative thinking than the name suggests. It is the foundation on which the portal will be built, and it needs to be the product of a very interactive process between the business and technology sides of an organization.

Logicalis Consulting Services Manager Dave Guerro recommends the formation of a steering committee that includes representatives from all of the appropriate departments. The role of the steering committee is to facilitate the decision-making process. Every portal project presents tons of decisions, and an executive sponsor can help make sure they are made in a timely fashion.

Because stakeholders for many portal projects are drawn from different departments, people may not work directly with each other during regular business activities. An efficient way to focus the steering committee's attention on building a requirements list is by launching the discussion with questions that cover critical considerations that all portals share, including availability, scalability, maintainability, functionality, security, and look and feel.



DEFINITION OF ROLES

An important item on the list of requirements is a definition of the roles and appropriate levels of access for all users. This, too, can seem like a straightforward task—until you start mapping what people actually do in a typical organization. Many need to be able to perform multiple roles and have access beyond their primary occupation.

“I’ve been in situations where administrators and users are sometimes the same people,” says Logicalis Managing Consultant Brian Day. “One guy might be a content reader in his role as a receptionist, but he needs to be a content creator in his role as administrative assistant. That’s the real world in business. People hold all these different crazy roles.”

Because the real world is full of exceptions, centralized management of portal authorization should be on the checklist for every portal project. Day says he has encountered portals that require administrators to open 25 different applications just to delete one user account.

Just because procedures have been in place for years doesn’t mean they are still the most efficient way to do business. Logicalis Managing Consultant Patrick Simmons worked on a portal project where it became apparent during the discovery phase that some of the procedures that had evolved during the years needed to be fundamentally re-engineered before they could be embedded in a portal.

“It was an epiphany for the client,” he says. It also rationalized the functioning of the document management portal by improving the way users stored their documents in the first place.

Organizations that apply the Logicalis discipline to the development of a requirements list often come away with a better understanding of jobs they thought they understood until they started to break the jobs down into their component parts. Optimized procedures, as a result, can be a by-product of portal development.

REMOVING THE RISKS

The twists and turns that can result from all of the people and agendas involved just in building a requirements list can easily cause a portal project to crash on the rocks of disappointment.

“Planning is key,” Guerro says. “Every minute you spend on planning on the front end will save time on the back end; in most cases, it amounts to greater than one to many.”

Simmons encourages clients to adopt the second habit of Stephen Covey’s Seven Habits of Effective People: “Begin with the end in mind.”

It worked for Wilton Re CTO Andy Wood, who partnered with Logicalis on the development of a document management portal: “Most people think about conversion at the end. They also think about usability at the end, about migrating into production at the end. They think about performance at the end. And they don’t know if any of those steps will actually work until they get there. We took all those risks out of the project right in the first iteration. We knew it would all work before we actually did it.”

Brainstorming Unchained

Developing a portal is, or should be, a creative and interactive process. One of the best ways to facilitate productive brainstorming is to make it as easy as possible to see what the portal will look like before committing to any technology.

Logicalis develops a series of sketches or wireframes for portal projects using a variety of technologies that include everything from pencil and paper or PowerPoint to WebSphere Portlet Factory. What’s important is a clear vision of what the portal will look like, not the tool that is used to create it.

“It’s amazing what you can do with a pencil and paper,” Logicalis’ Day says. “A lot of times when you look back at those sketches and compare it to the final product, you can see that 90 percent of the final project was what was scratched out on paper.”

PLATFORM PREFERENCES

Some of the primary development platforms that are used to build portals include Microsoft’s SharePoint, Oracle’s Application Server, IBM’s WebSphere, BEA’s WebLogic, and a variety of Java-based open-source tools. Each one has its pros and cons. The choice of a portal technology should be determined entirely by what is compatible with an organization’s IT infrastructure. (See Portals with Purpose for case studies that employ different technologies.)

IT managers who want their internal staff to stay focused on their primary responsibilities can partner with outside firms for access to the specific sets of skills that portal projects require. Portal projects encompass a broad range of issues, so it is important to choose a partner with the bandwidth to handle the infrastructure, integration, and network- and system-level issues that may be encountered during portal development and implementation.

The right partner offers tremendous flexibility. The right partner can design, build, integrate, host, manage, and even own and lease your portal back to you.

Whatever set of options you choose, Logicalis’ Olsen notes, it is always better in the long run to use a well-defined methodology and develop an enterprise portal the right way so you can avoid having to fix it after it has crashed and burned. “That’s doing it the hard way,” he says.

Logicalis knows from experience that the success or failure of any portal project depends more on communication and management than on technology.

10 BEST PRACTICES FOR BETTER PORTALS

The following list of best practices is distilled from what Logicalis has learned designing, developing, implementing, and supporting a diverse range of portals for organizations in many vertical markets.

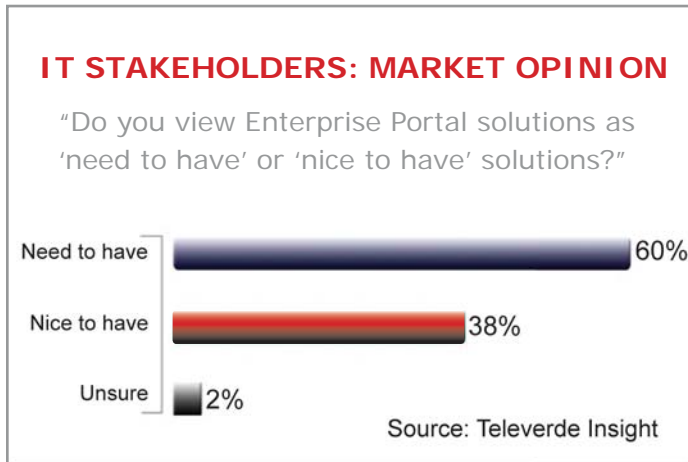
- 1.** Have a specific business reason for starting a portal project. Just owning a license for SharePoint, WebSphere, or WebLogic is not enough. One of the most common reasons portal projects fail is that they didn't have a clear objective to begin with. Don't start with technology. Start with a purpose.
- 2.** Establish a steering committee that has representatives from all of the users to be served by the portal, and empower them to determine the goals and objectives of the portal development. The steering committee should have no more than about 10 members, including a designated executive sponsor who makes sure decisions are made in a timely manner.
- 3.** Study the way people who will use the portal do their jobs. Don't assume that just because they've been doing things certain ways for years means they are the most effective. Little is gained by embedding procedures in a portal that no longer make sense. In fact, a portal project is an opportunity to determine the most effective way for people do their jobs.
- 4.** Involve the people who will use the portal in its development. Without their buy-in throughout the process, you run the very real risk that users will sign on to the portal but won't use it. Telling end users, "We're from the IT department. We're here to help," is not enough to win their allegiance.
- 5.** Begin with the end in mind. Whatever the portal is designed to do, you will need to manage it. Anticipate the best way to do that in advance, and then build it into your architecture from the beginning.
- 6.** Don't be blindsided by the inevitable. You know the portal is going to grow. How are you going to scale it? How are you going to back it up? How are you going to restore it if it goes down? How are you going to revise it when it needs updating?
- 7.** Build a portal with the same discipline you would apply to any other software development project. Just because it is easy to drag and drop packaged portlets wherever you want doesn't mean they are all going to work together. You also risk falling into the trap of letting the tool decide what you are going to do instead of figuring it out for yourself.
- 8.** Proceed incrementally from one success to another. If you've been keeping your end users involved (see best practice No. 4), they will become increasingly comfortable with the changes the portal will require in their jobs as you go forward.
- 9.** Be sure to include some candy for users along the way: a centralized fax repository, print on-demand capabilities, an easy way to retrieve the latest version of whatever they are collaborating on, access to data from any computer (i.e., from home), etc. Allow users to personalize their portals as much as possible. Little things often count more than the big ones in winning people over to new technology. In the end, users will be the ones who determine whether the portal is a success.
- 10.** Manage expectations. Many portal projects fail because sponsors and/or users have phase five expectations at phase one. It's important to get end users excited about the portal, but it's better to do so by integrating ideas into design than it is promising more than you can deliver.



Learn more about enterprise portals at
www.us.logicalis.com/ep

GATEWAY TO BUSINESS INTELLIGENCE

A recent survey conducted for Logicalis by Televerde Insight showed that a majority of IT managers in key industries know they need enterprise portals as a gateway to business intelligence to stay ahead of the competition.



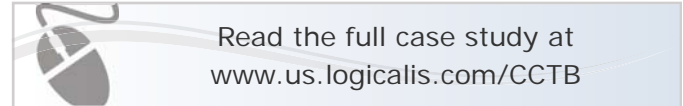
PORTALS WITH PURPOSE

Logicalis designs enterprise portals based on the specific business requirements of its clients and only then chooses the technology that is most compatible with their environments. The following case studies demonstrate the range of capabilities that portals provide, as well as the range of technologies that can be used to build portals:

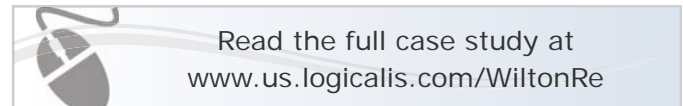
The Chicago Convention and Tourism

Bureau (CCTB) is the sales and marketing organization charged with bringing business and leisure visitors to Chicago. As a not-for-profit organization with a big charter, the CCTB needed a way to post more content, more frequently, with fewer IT resources. Using Microsoft's Content Management Server, Logicalis provided a content management capability behind all three of the CCTB's Web sites, enabling the appropriate CCTB resources to update their own pages using easy Web-based tools. Page templates created by IT also made it easy for new Web pages to be created. The built-in approval workflow allows managers to delegate page creation and

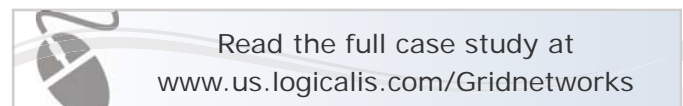
update others in the organization. Today, visitors to CCTB's portals can access the most current information about what's going on in Chicago.



Wilton Re is a successful company in the reinsurance vertical whose business model calls for the formation of long-term relationships with strategic partners. Working closely with Wilton Re CIO Andy Wood, a software development team from Logicalis Consulting Services implemented an innovative SharePoint system that enhanced collaboration between Wilton Re and its partners, improved search and sorting capabilities, provided granular levels of security, and laid the groundwork for a broad document management strategy. Wilton Re, among other portal clients, also relies on Logicalis to provide the Managed Services that ensure the company's entire IT infrastructure is supported 24x7.



GridNetworks of Seattle is a leading provider of managed Internet television delivery services. GridNetworks executives envisioned a flexible and user-friendly portal where customers could upload and manage video content, view network status, track trouble tickets, set up and control service options, and conduct ongoing analytics of viewer trends. The executives wanted their customer portal to take full advantage of Web 2.0 asynchronous JavaScript and XML (AJAX) Web development techniques so the portal would function very much like a full-featured desktop application. Logicalis used open-source Java applications for the portal.



ABOUT LOGICALIS

Logicalis is an international provider of integrated information and communications technology (ICT) solutions and services founded on a superior breadth of knowledge and expertise in communications and collaboration, data center optimization, application development and integration, and outsourcing and managed services.

With its international headquarters in the UK, Logicalis Group employs more than 1,600 people worldwide, including highly trained service specialists who design, specify, deploy, and manage complex ICT infrastructures to meet the needs of more than 6,500 corporate and public sector customers. To achieve this, Logicalis maintains strong partnerships with technology leaders such as Cisco, HP, IBM, and Microsoft.

The Logicalis Group has annualized revenues in excess of \$1 billion, from operations in the UK, US, Germany, and Latin America, and is fast establishing itself as one of the leading IT and Communications service providers, specializing in the areas of advanced technologies and services.

The Logicalis Group is a division of Datatec Limited, a \$4.2 billion revenue business listed on the Johannesburg and London AIM Stock Exchanges (LSE/JSE: DTC).

For more information, visit www.us.logicalis.com
or call 866.456.4422.