IBM Lotus Symphony :
Worldwide IBM internal deployment
Best Practices

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IBM

The fine print... :-)

IBM® Lotus® Symphony™ : Worldwide IBM internal deployment Best Practices

Abstract :

? Learn how IBM IT designed and initiated its worldwide deployment of Lotus Symphony. IBM's document interchange policy is based on ODF, with Lotus Symphony becoming the preferred personal productivity suite for most employees. This talk will detail the methodology and deployment experiences of IBM's large scale deployment of Lotus Symphony. Open Document Format extends our Open Computing strategy which is centred on the value of open standards, open source software and open architectures.

? **John Walicki - Open Client Architect, IBM**
Biography: John Walicki is part of the IBM Senior Technical Staff and architect for the Open Client Initiative. He leads the open standards based Browser Independence deployment of Firefox within IBM and the Document Interchange strategy to switch IBM to Open Document Format based productivity editors. John is a member of the IBM CIO Office Total Workplace Experience organization. His global development and integration teams are working to lower the costs of deployment of an enterprise enabled Linux Client. John is an active leader in the Linux desktop community where he represents IBM on The Linux Foundation's Desktop Linux Workgroup and as a member of the Gnome Advisory Board. John previously was a manager in the Watson Information Services department at the IBM T.J. Watson Research Center where he spent 16 years supporting the IBM Research user community.

Agenda
IBM Lotus Symphony: Worldwide IBM internal deployment Best Practices

- IBM IT Transformation

- IBM IT Document Interchange strategy

- IBM internal deployment of Symphony 2008 - 2010

  - Enablement

  - User Segmentation

  - Education / Support

  - Adoption

  - Business Application Reengineering

Realization of IBM Vision for Open Computing
Evolution of the IBM I/T Client Strategy

Vision: **Employees get right tool at the right time for the right cost. To realize this…**

- Higher productivity through collaboration
- Drive to Web through lightweight platforms
- Roles based dynamic delivery of IT resources

1988

Each Division Had Own IT Shop Supporting Separate Host VM/MVS Systems

User Support Based On Specialist Down The Hall

Site Location Focused

1999

Standardization Program

Standardized Image Build & Delivery, Support, Mail and Calendar, Asset Management, Software Delivery

2001

Consolidation of Standard End User Services At Geography/Country Level

Web Based Software Delivery

Linux Desktop

Cross-geography Alignment

2006

Globalized End User Services

2 PC Images: Windows, Linux

Shift To Self-Help Model With Translated Content

Global Workstation Asset Management

Single Image Delivery Solution Supporting Multiple Sourced Media (network, CD/DVD)

2008 - 2012

Flexible Offerings

Light / Thin Client

Open Computing

Employee Subsidized Devices

Roles Based Policies For Personalization / Customizations

Applications As Hosted Services

Platform Shifting To Network

IBM's roadmap to "open computing"

Increased interoperability and flexibility

Web 2.0 open technologies

Open Collaborations

Notes 8 & Productivity Tools

ODF Strategic standard for document interchange

Adoption of Open Document Format

Eclipse-based Expeditor / Sametime IM 7.5

Notes 701: Linux/Mac

Open standards, open source, open architecture

IBM Productivity Tools

Open Client (Linux, Win, OS X)

IBM Workplace Managed Client

Closed solutions

Microsoft Office

Windows 2000 / XP

Lotus SmartSuite

First Linux desktop introduced

OS/2

Windows 95/98

High

Low

Strategic Open Standards

Time

1998

2002

2006

2008

Deliver increased value through strategic open standards
- Provide better choices
- Increase interoperability
- Optimize document interchange

6

What does it mean to be Open ?

- **Goals of Openness**
  - Flexibility
  - Resiliency
  - Maximize freedom of action
  - Avoid vendor lock-in

- **Open Standards**
  - Improving information sharing by simplifying integration of disparate technologies
  - Promoting interoperability by using open published specifications

- **Open Architecture**
  - Increasing collaboration by easily extending business processes – eg SOA
  - Innovating on top of common hardware specifications

- **Open Source**
  - Promoting innovation by leveraging community development
  - Accelerating open standards adoption

Open Computing

Open standards

Community Innovation

Open architecture

Open source
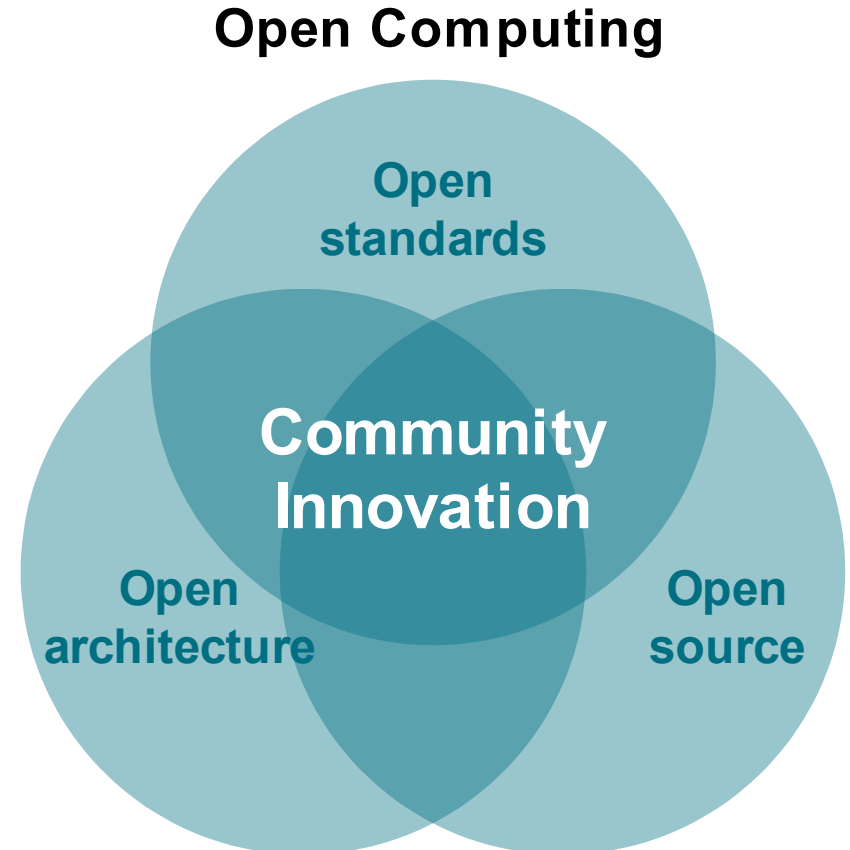
IBM's Open Client Strategy
## Heterogenous Desktop Environment

- Client strategy is to provide IBM's workforce with the right client platform based on job role
  - Flexibility and choice of client platform and operating system
  - Reduced total cost of ownership, especially through server-managed clients
  - Cross-platform client application development through Lotus Expeditor Rich Client Platform
  - Leverage web browser for business applications
  - Linux plays a key role in the wider IBM Client strategy
  - Document Interchange via ODF

Client Access

Rich   **Thin / Virtual**

Collaboration & Application services

LOB Apps

Symphony   Notes   Sametime   Connections   Quickr

Platform Framework

Lotus Expeditor

eclipse

WebSphere Portal

Portal

Windows   **Mac**

Operating Systems

IBM IT Document Interchange Strategy

Objective

- Long term, strategic effort in support of our Open Computing strategy

- Enable the IBM business to author and exchange documents today and into the future without concern for file format

- Provide a rich productivity suite that will enable IBM to shift to a format based on strategic open standards for document authoring and interchange in an accelerated time frame...

- Lower IT costs by using IBM products

- Save money in our own IT budgets to invest elsewhere
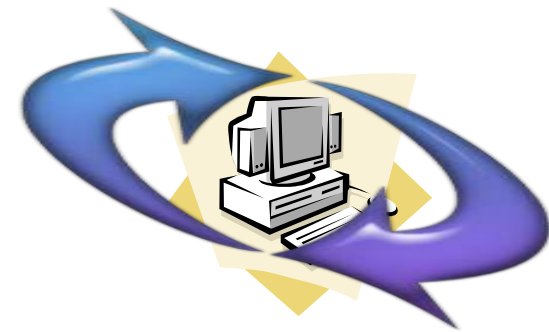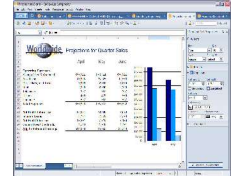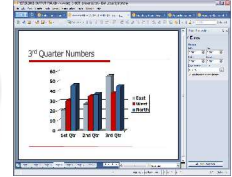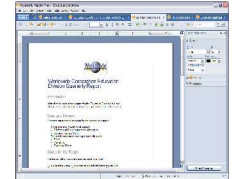
OASIS

Lotus Symphony Deployment Showcase

Goals

- Partnership between Lotus and IBM IT
- Accelerate the development and maturity of IBM products by engaging with the internal IBM Early Adopter communities (TAP)
- Identify gaps early and assist Lotus on prioritization of features - Influence their roadmap to meet the IBM Enterprise requirements
- Lead the industry in the adoption of open standards based technologies
- Focus on Open Standards based solutions
- Demonstrate to customers how to deploy ODF and Lotus Symphony
- Help our customers with their adoption through best practices
- Align with IBM Lotus product strategy and exploit IBM Research technology
- Improve business process integration and decrease TCO
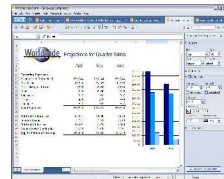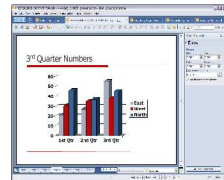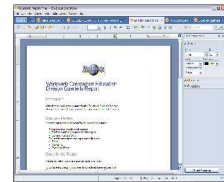
Execute a 3 year phased Symphony deployment

Phase 1 Current State	Phase 2 Y2009-10	Phase 3 Y2010+

- Plan the introduction of Lotus Symphony
- Deployment and software distribution methodology
- Enable IBMers to exchange ODF Documents
- User segmentation
- Metrics / Tracking / Reporting
- Communications Plan
- User Support / Education
- Drive Network Effect

- Business Application assessment / inventory
- Map Symphony capabilities to business unit user segments
- Business Process reengineering to create / emit ODF
- Developer Education
- Extend the user experience via Plugins

- Broad adoption of Lotus Symphony and ODF within IBM
- Continued support for legacy file formats

User Segmentation

Work is not a place

- 385,000 employees world-wide in 64 countries
  - Americas - 157,000
  - Europe - 93,000
  - Asia Pacific - 135,000
- ~40% of our workforce conducts work away from an IBM office
- ~12% work solely from home
- ~About 23% "road warriors" – mobile/frequent travelers
- ~About 4% based entirely at client sites
- ~About 2% work in manufacturing settings
- ~About 85% have laptops
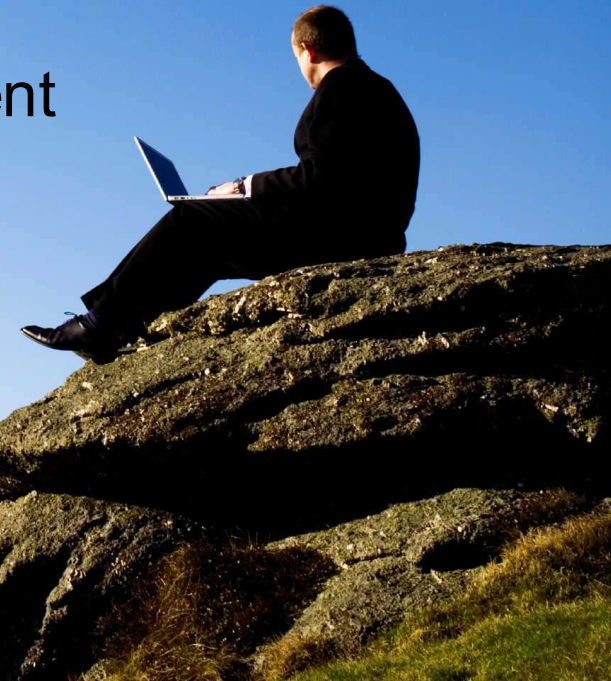
User Segmentation and Deployment Strategy

- Identify the IBM user segments that are good candidates for Symphony deployment
  - By Business Unit
  - By Geography
  - By Job Family
  - By customer facing requirements
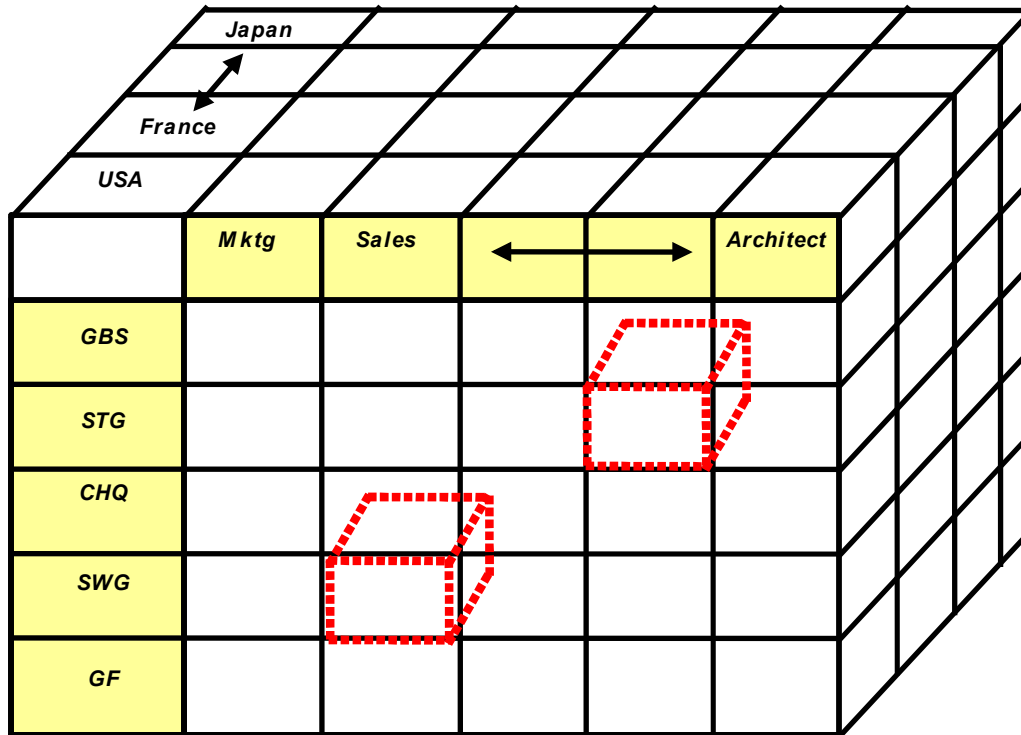
User Segmentation and Feasibility Studies

- **Which segments are good candidates**
  - Split deployment into Phases
  - Assess which Business Units can start today
    - SWG – SWG Marketing
    - GBS – Customer facing consultants
  - Job Roles
    - Linux users – already using Symphony
    - Finance – Financial spreadsheets
- **Document Authoring vs Document consuming**
  - Authoring needs are a higher requirement
  - Users that simply read documents
- **Run Feasibility Studies and Assessments**
  - GBS / SWG / CIO / SWG Finance

User Segmentation and Feasibility Studies

- **Which segments are good candidates**
  - Develop deployment plans to a progression of user segments
    - Match the capabilities of Symphony with the needs of each user population
    - Comparison of the feature gaps between Symphony and MS Office 2003 and MS Office 2007
    - As the Lotus Symphony roadmap closes user requirement gaps plan the order of the migration
    - If particular features are not included in Symphony, identify implications for some user segments
  - Assessment of internal applications that use/generate Excel spreadsheets / VBA Macros

Symphony Software Provisioning within IBM

Provisioning IBMers with Lotus Symphony

- **Notes 8.0.1 Deployment**
  - Accelerate Deployment of Notes 8.0.1 to broad IBM user population
  - Users with sufficiently powerful systems
  - Fully integrated email / Collaboration / Productivity
  - Converged document interchange platform
  - Embedded Symphony 1.0 capabilities
  - Embedded Symphony 1.1 refresh
- **Symphony Standalone**
  - Available via IBM Standards Software Installer (ISSI)
  - Internal web based software shopping catalog
  - Symphony 1.0 / 1.1 packages / Quarterly cycle
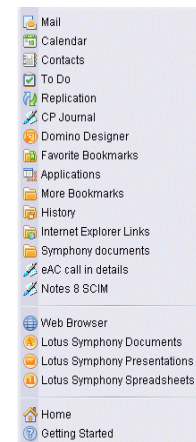
- **Technology Adoption Program (TAP)**
  - IBM internal Early Adopters willing to run beta software releases
- **Automatic refreshes**
  - EzUpdate for users that have Symphony
- **Preload - Windows / Linux**
  - 100K / year worldwide
  - Add Symphony to the Windows Client preload
  - New hardware with sufficient memory
  - Add Symphony to Open Client for Linux image

Mail
Calendar
Contacts
To Do
Replication
CP Journal
Domino Designer
Favorite Bookmarks
Applications
More Bookmarks
History
Internet Explorer Links
Symphony documents
eAC call in details
Notes 8 SCIM

Web Browser
Lotus Symphony Documents
Lotus Symphony Presentations
Lotus Symphony Spreadsheets

Home
Getting Started

Symphony Deployment Project Management

Symphony Project Office

- Establish a Symphony Project Office
  - CIO / IGS program managers, architects and mgmt
  - Funding

- Coordinate all Symphony activities
  - Deployment
  - Business Units
  - Internal communications

- Facilitate partnership with Lotus Development
  - Interlock with WPLC on rapid release rate schedule and activity
  - Identify within Business Units and Geographies feature requests vs problems
  - Identify within Business Units and Geographies critical applications and dependencies on Symphony
  - Continuous feedback mechanism to feed critical defects and requirements to the development team for inclusion in future releases

Symphony Training and Education

Education and Training

- **Education**
  - Engage IBM Education team
  - Develop "Symphony Essentials" course curriculum
- **Personal Productivity**
  - Migration to Symphony is a learning curve and requires some retraining for the new interface
  - Provide assurances there is a migration path for access to legacy documents

- **Training**
  - Offer education and support to employees during migration phase
    - Classroom courses, self help tutorials, reference cards, demos
    - Continue w3 Communications with HowTo Tips
- **Culture – Change user behavior**
  - Drive Communications and Awareness
  - Explain to IBMers **why** a transition to Symphony is beneficial
  - Avoid edicts and forced migrations that cause employee dissatisfaction

Helping users get started with Symphony

- **Adopt Symphony document format for 1 meeting**

  - Migration does not need to be cold turkey

  - Enable all participants with the Symphony Editors

  - Drive read only usage / familiarization

  - Drive Network Effect

  - Observe / Test readiness of documents

Communications

IBM Early Adopter Community Symphony pilot

- **Partnership**
  - Continue the development partnership between the IBM I/T and IBM Lotus CSDL Symphony Development team
- **TAP Early Adopters**
  - Pilot Symphony Beta releases
  - 30,000 users
  - Bug Reports / Feedback

Communications

Continue awareness campaign through w3 Communications

- Prepare w3 communication articles Highlighting IBM plans to adopt ODF
- Launch a Symphony wiki
- Create a Symphony Blog
- Establish a "Get Symphony" campaign
  - Symphony Week
- IBM Presentation Central templates
- Lead by example
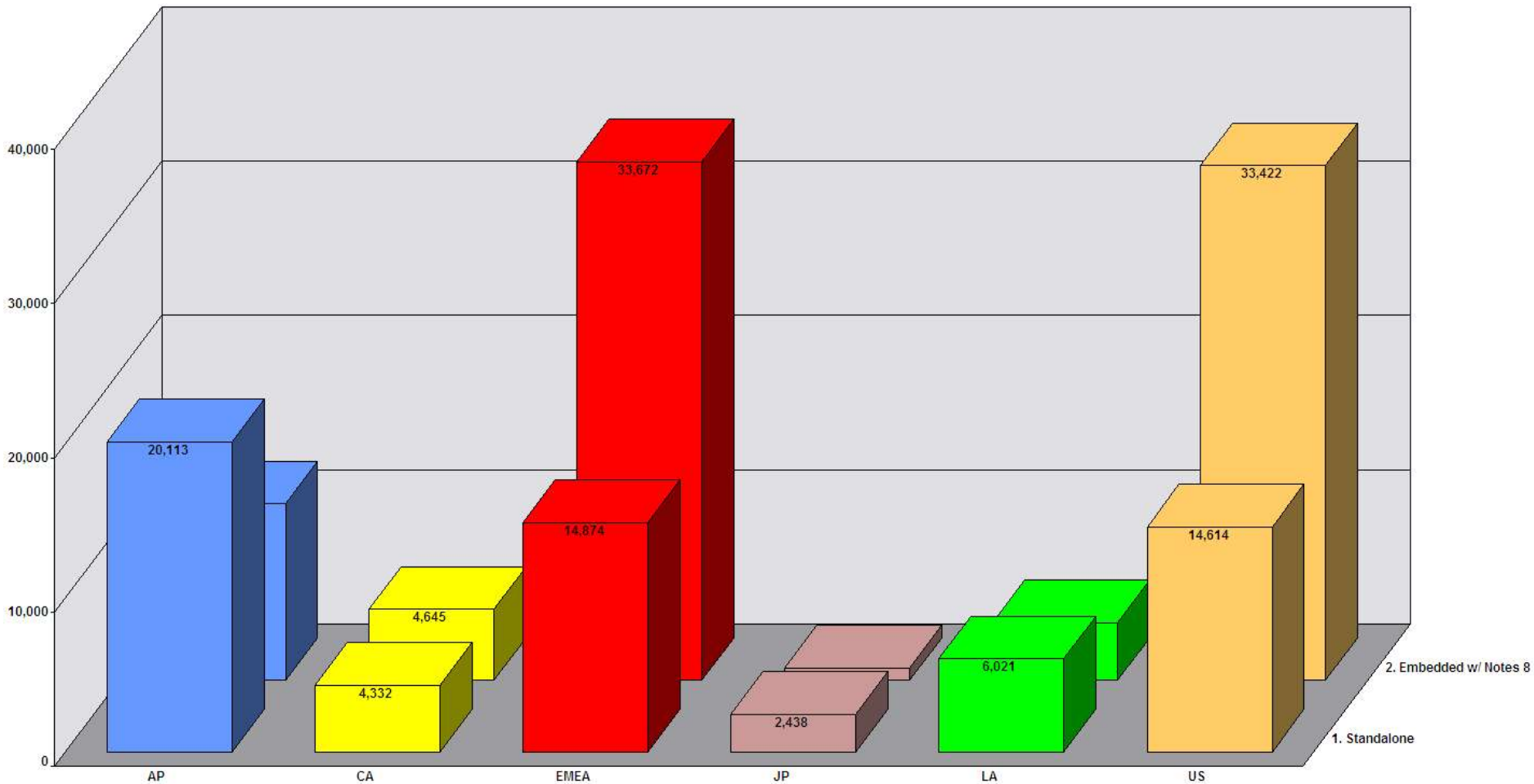 - Executive Challenges to teams
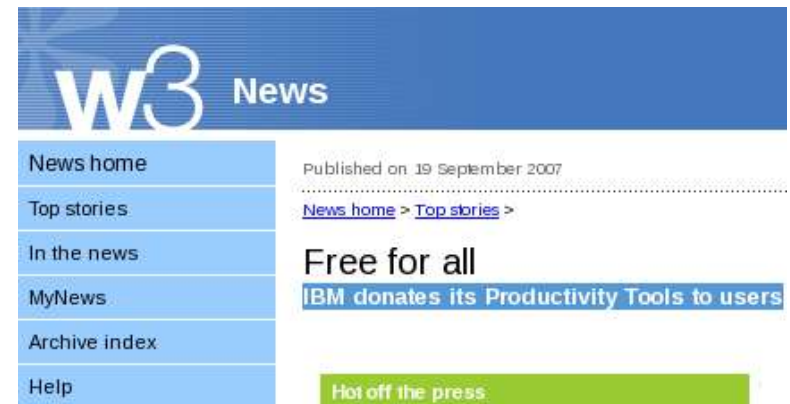
Metrics / Tracking / Reporting

Symphony Deployment Adoption Metrics
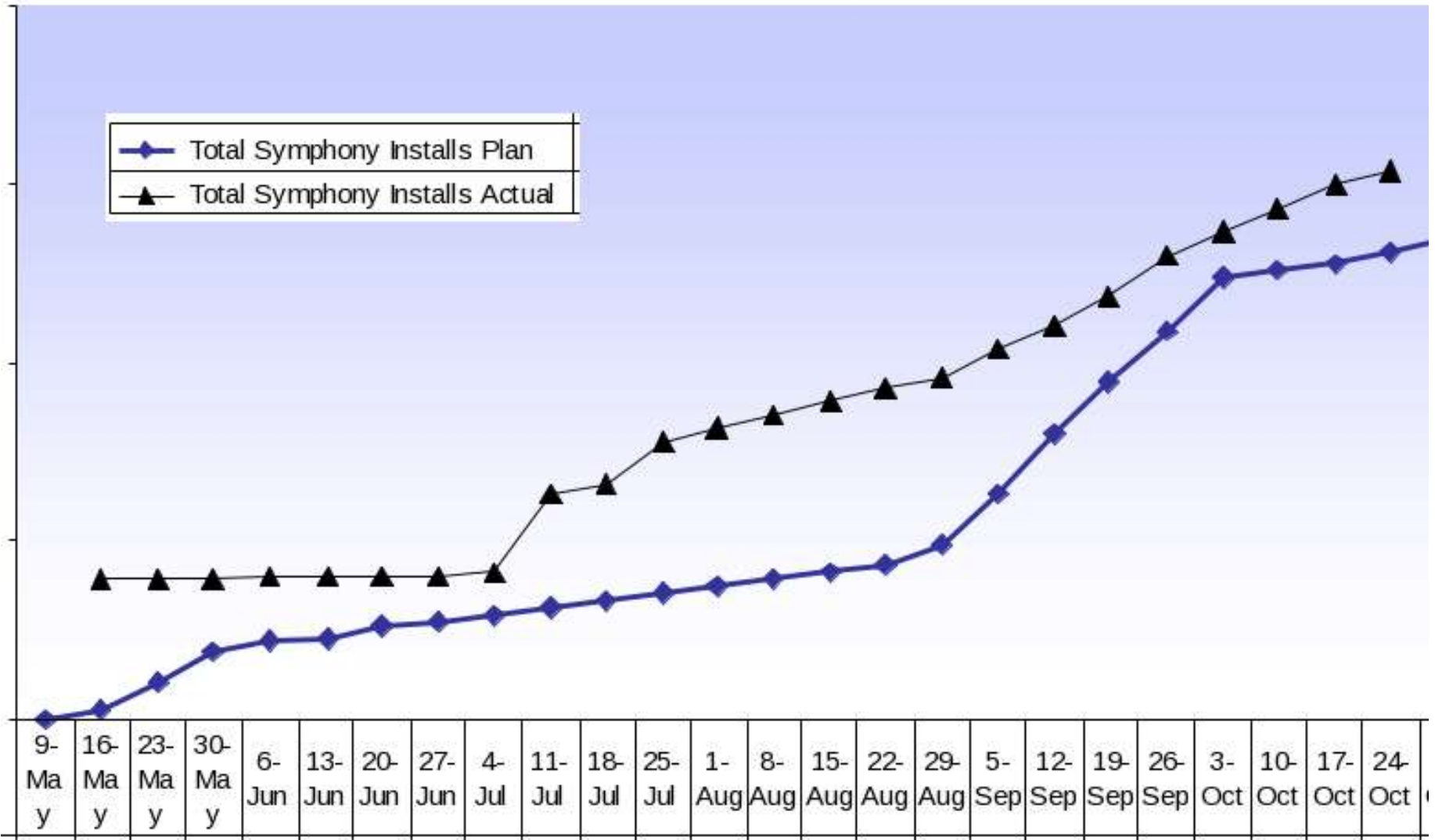
Symphony Deployment Adoption Metrics – by Geo

Symphony integration into IBM business processes

ODF Integration into IBM business applications

- Business Application assessment / inventory
  - Coordinate with the business units to create an inventory of business processes that generate legacy documents
  - Track remediation efforts
- Establish a "Porting Center" to assist Business Units in their remediation
  - Application Development/Maintenance funding to adopt ODF across existing IBM internal application portfolio
  - Business Process reengineering to create / emit ODF
  - Dedicated "consulting" developers to help application developers in their transition to ODF
  - Prioritize and fund the remediation of new business processes that have high/ broad impact to the corporation
- Developer Training
  - Symphony Programmability training for Application Developers which will allow IBM business units to convert business processes that generate legacy formatted documents to create ODF documents

Lotus Symphony Plugins

- Symphony can be extended and customized
  - To extend the user interface with new capabilities
  - To move data between Symphony and other applications
- Symphony has API's for different developer communities
  - Java developers on Eclipse/Expeditor
  - Notes developers using LotusScript
  - OpenOffice developers
- Encourage developers to create plugins for Symphony
  - Extension interfaces will be added to Symphony and to Notes over time
  - Collaborative Innovation to make Symphony better
  - IBM plugins for: Quickr, Unyte, Connections, Websphere Translation Server...
- Enhance the user experience through Symphony Plugins

Lotus Symphony Programmability

- Toolkit -- Developer's guide, API references, sample, tutorial and utilities

- Symphony programming model -- public APIs, extension points

- Eclipse plug-in support in stand-alone Symphony

- Composite Application support (Java™ & Lotuscript) in Notes 8.0 & 8.0.1 embedded Symphony

- Symphony website
  - New dedicated Developer Forum
  - IBM Plug-ins published on website.
  - Allow 3rd parties to publish descriptions & links to the plug-ins hosted on their own website.
  - New support forum dedicated to plug-ins users

Summary

- IBM IT Deployment of Lotus Symphony is a multi-year initiative
- Lotus Symphony supports the IBM IT Transformation toward Open Computing
- IBM IT Document Interchange strategy is built on ODF
- 2008 Highlights
  - Enablement
  - User Segmentation
  - Education / Support
  - Adoption

Thanks!

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