

INTELLIGENT BUSINESS STRATEGIES PRESENTS



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**DESIGNING & BUILDING
ENTERPRISE PORTALS**



OVERVIEW

Many businesses are purely reliant on the ability of business users and managers to be able to find, and access, all necessary job specific, business content (information and applications), wherever it may be located on different systems, inside and outside, the enterprise to do their jobs efficiently and effectively. However, most users are often unaware of valuable information. They spend hours filtering out irrelevant content and are often unable to exploit application functionality because the application is not available to their business community. What they want is to personalise content to their individual roles and business needs while becoming more productive by using common business processes and common applications. Users require access to both structured and unstructured information, applications and collaborative tools, as well as common business processes that span applications to help them be more effective in the workplace. In order to meet this need, companies are looking towards Portal technology to manage and integrate information and applications into a single user interface and provide the tools needed to collaborate with others both inside and outside the enterprise. This two-day workshop introduces Portal technology and looks at how to design and deploy a Corporate Portal for internal business use and an E-Business Portal for external user access to business content.

MODULE 1 - AN INTRODUCTION TO PORTALS

This session introduces portals and the reasons why they are needed. It explores the requirements for internal corporate and e-business portals, the cost of deploying them, and their functionality. It also looks at different types of portals, how they have evolved, and the types of content that can be accessed and integrated using them. It explores portal architectures and components in detail.

- What is a portal?
- The business case
- Portal user communities
- The scope of content that can be managed and organised in a portal
- Accessing unstructured content, applications, business intelligence and collaborative tools
- The evolution of portal technology
- Types of portals and how to classify them – internet portals, intranet portals, business intelligence portals, internal corporate portals and e-business portals
- Portal services for offline portal browsing of content
- Portal product packaging
- Portal architecture, components and services
- Best practices for portal implementation

MODULE 2: UNDERSTANDING FUNCTIONAL AND CONTENT REQUIREMENTS

This session looks at the business objectives for using portal technology, the differing needs of internal and external user communities, and the methods that can be used to prioritise and collect community requirements. It introduces the need for an information usage study, and discusses what kinds of requirements should be collected and for what purpose.

- Key business functional areas and their use of business content
- What people need to access
- Communities and roles
- Issues with content usage and access today

- Content types and locations
- Internal and external business community needs
- Understanding strategic business objectives
- Collecting requirements for a portal project - the content usage study
- Prioritisation: mapping content usage to business objectives and selecting a pilot project

MODULE 3: SELECTING AND INTEGRATING PORTAL PRODUCTS

- What is involved in selecting portal technologies
- Portal technology selection requirements
- What to look for when selecting products
- Making sense of portal packaging
- The portal marketplace: stand-alone portals platforms, Web server portal platforms, application portals, BI Portals
 - BEA Aqualogic Interaction, SAP Enterprise Portal, Microsoft Office SharePoint Portal Server, IBM WebSphere Portal Server, Vignette, Hummingbird, Oracle 10g AS Portal, open source portal products, etc
- The emerging portal services marketplace
- Portal services vendors
- Offline browsing
- Federated portal architecture – myth or reality?
- Portal integration using JSR168 and WSRP
- Using portal frameworks and portlets to integrate portal technologies and content
- Integrating application servers and EAI into the portal
- Web services and portal integration
- Portal-enabling collaborative and BI tools
- Accessing technical metadata via the Portal

MODULE 4: PORTAL TAXONOMIES AND CATEGORISATION

This session looks at portal taxonomy development and the techniques and technologies for categorisation of business content. It discusses top down and bottom up approaches to developing taxonomies, how they relate to the business content usage and requirements study, and specifically looks at taxonomy design to maximise ease of navigation and good organisation of business content

- What is a portal taxonomy?
- Types of portal taxonomies
- The portal taxonomy and the portal directory
- Portal directory business content metadata
- The portal taxonomy – topics and hierarchies
- Types of taxonomy – what kind are you building?
- Pre-built taxonomies
- Approaches to taxonomy design - top down vs. bottom up
- Taxonomy related portal services – categorisation and personalisation
- Approaches to the iterative process of content categorisation
- Identifying content to be categorised and managed by the portal
- Manual vs. automatic content categorisation
- How manual categorisation works
- How automatic content categorisation works
- Creating portal taxonomy entries and maintaining them
- Pre-defined portal taxonomies and categorisation

- Categorisation services - how the products work
- Categorising very large amounts of data
- Product examples – Verity, Microsoft, IBM

MODULE 5: CUSTOMISING A PORTAL TO MEET YOUR BUSINESS NEEDS

This section looks in detail at portal customisation, the process of tailoring and extending a portal to match an organisation's presentation standards and business content. It looks in particular at the portal development kit and how it can be used to customise a portal user interface and develop portlets for new content sources.

- What is portal customisation?
- What kinds of portal customisation can be done
- The Portal development kit
- Portal interface considerations
- Portal content portlets
- Adding new content sources to the portal e.g. applications, content stores, etc.
- Adding portlets to a portal user interface
- Portlet portability – myth or reality?
- Emerging standards for portlets
- The Impact of extranet and public Internet access to e-business portals

MODULE 6: DESIGNING AND IMPLEMENTING A PORTAL SECURITY SERVICE

This section looks at the problem of portal security and how to manage it. In particular it looks at user authentication and authorisation and how to integrate with already built portal solutions

- Portal communities – user groups and users
- User authentication
- Issues with authentication
- Plugging portals into your own security management solution
- Portal integration with cross platform LDAP directories
- Portal security administration vs. your own – how to manage a conflict
- Product examples – IBM Tivoli, Oracle Oblix, RSA, CA eTrust SiteMinder
- Authorisation – the more difficult security problem
- Dealing with application specific authorisation vs. portal authorisation
- Distributing administration control - authorising portal security administration itself
- Single sign-on – myth or reality?
- Planning for single sign-on
- How single sign-on can be implemented
- Third-party portal security products
- Web services and security – is this a huge problem?
- Searching and security – protecting portal metadata as well as content
- Case studies – what some companies have done

MODULE 7: IMPLEMENTING PORTAL CONTENT INTEGRATION

This session takes a deeper look at integrating content. It focuses on content management, applications, collaboration, and workflow. It looks how portals are evolving toward process-driven portals where enterprise workflow makes it possible to define common business processes that link relevant content needed to conduct browser-driven business processes.

- Content management and portals: this section explores tools and technologies involved in content capture, management and delivery. It also discusses different approaches to integrating content management software into the portal environment.
 - Portal content stores vs. content management systems in portals
 - BEA Aqualogic Interaction, Vignette, DB2 Content Management System, Microsoft Windows SharePoint Services, Documentum, Stellant, Interwoven
- Collaboration and portals: this section discusses and demonstrates the use of collaboration tools in portals. It shows how workflow can be used in portals to interconnect applications, business intelligence and unstructured content.
 - Approaches to collaboration
 - Building a collaborative user workspace
 - Types of portal collaboration tools and their uses
 - Collaboration outside the portal vs. inside the portal – which is best?
 - Options for integrating collaboration tools into portals
 - A demonstration of the productivity benefits of collaboration via the portal
- Integrating applications, web services and business processes into portals
 - Using workflow in portal technology – defining business processes across applications and content
 - Examples of portal products using workflow
 - The process-driven portal
 - Aligning application and information components with business process tasks
 - Attaching portlets and portal pages to a business process
 - B2B process integration via portals
- Case studies

MODULE 8: DEPLOYING A PORTAL TO USER COMMUNITIES: IMPLEMENTING PORTAL PERSONALISATION

This section looks at deploying personalised portals to user communities. It looks at the different types of personalisation, and how they relate to deploying portals to different user communities. It shows examples of how users can filter business content to match their requirements while remaining within an organisation's security policies.

- What is portal personalisation?
- Types of personalisation – user driven vs. application driven vs. business intelligence driven
- Enabling access to external users
- Deployment - the User Driven Personalisation process
- Personalising portals for user communities
- Dynamic assembly of the relevant portal components
- Application driven personalisation
- Approaches to application driven personalisation
- Embedding personalisation in portal applications – the implications
- Using business intelligence for real-time personalisation
- Issues with personalisation today

PRESENTER

Mike Ferguson is the Managing Director of Intelligent Business Strategies Ltd (formerly DataBase Associates International Ltd). As an independent analyst and consultant he specialises in Enterprise Business Intelligence, and Enterprise Business Integration. With over 25 years of IT experience, Mike has consulted for dozens of companies, spoken at events all over the world and written numerous articles. He is also an expert on the B-EYE-Network and on Shared Insights Portals Community Network. Prior to founding Intelligent Business Strategies, was a member of NCR's worldwide product strategy and architecture team as a Chief Architect working on the Teradata DBMS. He spent four years as a principal and co-founder of Codd and Date Europe Limited – the inventors of the Relational Model - specialising in IBM's DB2 product and was a partner at DataBase Associates with Colin White.



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