

# IBM Software Demos

## Lotus Workforce Management

### IBM Lotus Workforce Management Demo

#### **bSlide 1**

This demonstration Introduces IBM Lotus Workforce Management – a self-service accelerator for IBM WebSphere Portal.

#### **Slide 2**

[Bullet 1] With Lotus Workforce Management, businesses can rapidly create Human Resources self-service solutions [Bullet 2] that help streamline the delivery of HR services [Bullet 3] and expand strategic focus.

#### **Slide 2a**

[Bullet 4] An intuitive user interface helps users navigate through the various steps of HR tasks [Bullet 5] and provides a single, integrated access point to the information and systems needed for efficient task completion.

#### **Slide 3**

This demonstration scenario shows an Employee, Manager, and HR Representative using the extensive self-service capabilities of Lotus Workforce Management to address various HR tasks.

#### **<Demo – Employee>**

##### **1a >**

To begin, we see Deborah Bach, an employee at Zetabank, logging in to Lotus Workforce Management and the default home page for employees.

##### **<1b>**

The “My Resources” portlet displays all HR functions available to Deborah, organized by event type or resource category.

##### **<1c>**

From the right-hand navigators, she has easy access to News and Information, while the portlet in the center of the page displays alerts that require her attention or action.

##### **<1d>**

Across the top of the screen are a set of tabs for additional pages that display subsets of HR resources dealing with specific topics, including Health, Finances, and Career.

##### **<1e>**

On the “Policies and Information” page, Deborah can search for and review information about Zetabank’s HR policies. This information is provided through a Web Services interface that connects with a variety of backend knowledge bases.

##### **<1f>**

As a result of her recent marriage, Deborah must change her marital status in the company’s HR system. This task is made easy with Lotus Workforce Management. In the “Life Events” resource category on the Home page, she simply selects the “Marriage” option, and proceeds with the change.

##### **<1g>**

First, Deborah is presented with a checklist. Checklists are used here and elsewhere throughout Lotus Workforce Management to guide employees through the processing of HR events. They can also be easily customized to fit a company’s exact policies and practices.

## IBM Software Demos

### Lotus Workforce Management

#### <1h>

This checklist contains each activity to be completed, along with an associated timeframe. Deborah must complete certain activities, while others are optional.

#### <1i>

Opening the first item in the checklist, she is presented with a form that allows her to edit her marital status as it appears on company records stored in SAP, Zetabank's HR system of record. With just a few clicks, she can make the change, save it, and submit it for processing.

#### <1j>

Almost immediately, she sees a confirmation that her request was successfully processed, and that the information in SAP has been updated.

#### <1k>

Returning to the checklist, the green checkmark to the left of the activity indicates that it is now complete.

#### <1l>

As Deborah continues on to other activities, the checklist will track her progress.

#### <1m>

Back on her Home page, the Alerts portlet shows that the "marital status change" checklist is in progress. For now, the "Priority" value is green and "Informational", since she is far from the end of the 30-day timeframe allowed for completing the mandatory items. As the deadline draws closer, this value will change accordingly.

#### <TRANSITION TO MANAGER LOGIN>

#### <2a>

Ricky DelGardo is a manager at Zetabank. As an employee, he is provided with the same Lotus Workforce Management resources as Deborah, but his position as manager enables him to access additional resources, located on the "Manager's Desktop" page.

#### <2b>

On this page, the "Alerts & Notifications" portlet now contains information relating to Ricky's management responsibilities, and the "My Resources" portlet contains a "Manager Events" resource category.

#### <2c>

Ricky is in the process of hiring a new employee named Adam Smith. Here, he selects the "New Hire" option from the Manager Events resource list.

#### <2d>

He is then prompted to enter Adam's name, and is immediately presented with a checklist that clearly defines the activities that need to be completed to bring him on board.

#### <2e>

One of the mandatory items in this checklist involves completing and submitting a form containing information about the new employee.

#### <2f>

Once submitted, this form will move through a defined workflow that involves a number of participants, including Ricky, an HR administrator, and a second-line manager.

#### <2g>

## IBM Software Demos Lotus Workforce Management

Fields that require input are indicated by a red asterisk. Some of these already have been filled in, and Ricky completes those that are not, including Adam's effective date of hire, and the name by which he wishes to be known.

<2h>

Forms and workflows associated with manager events inside Lotus Workforce Management can be easily configured to meet exact customer requirements.

<2i>

With all required fields completed, Ricky advances form processing to the next step, where input is validated.

<2j>

Finally, he submits the form and receives a confirmation.

<2k>

In the "Alerts & Notifications" portlet, a new entry appears, indicating that the workflow processing for the New Hire request has been initiated, and is awaiting action from the HR organization.

<TRANSITION TO HR REP LOGIN>

<3a>

Frederick Thompson is Ricky's HR representative at Zetabank. He too has access to all Employee resources, but also has an additional page that contains HR-related resources and alerts.

<3b >

Frederick has just received an alert regarding the New Hire request submitted by Ricky. Here, he can open the alert, perform the necessary actions based on his role in the organization, and submit his updates, which automatically routes the form to the next step in the workflow.

<4a >

**Closing Slide** - IBM Lotus Workforce Management helps businesses increase efficiency and enhance strategic focus. It provides an intuitive user interface, is highly configurable, and interfaces with SAP and non-SAP environments, using the powerful and open integration capabilities of IBM WebSphere Portal.

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