

Lowering Costs: Should We Consider Linux for Lotus?

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Introduction



Speaker Info...

- Working with Notes since 3.0c, in 1993
- Architect, admin, auditor, trainer, process engineer, team lead, “reformed developer”
- Co-authored two IBM Redbooks on Linux
- Multiple Lotus Certifications
- Significant regulatory compliance and Domino specialty project experience
- Linux aficionado

- What is Open Source?
 - In simple terms: when you buy the software, the source code is also available
 - You can peruse, customize, and compile the code
 - True for all vendors, under this license
 - Including: Red Hat, Novell SuSE, Ubuntu
- What about support?
 - Early on several firms pre-compiled Linux source, sold the build, then maintained it
 - Enterprise-class support is available
 - Bugs generally addressed faster; very stable

What is Lotus Doing with Linux?



- 1999: Linux community involvement
- 2000: Linux on all IBM hardware pledge
 - Invested £628M (US\$1B) into long-range planning
- 2001: £25M (US\$40M) software donation to form Eclipse organization
 - 1200 developers in 63 countries contribute
- 2003: Inaugural keynote—Linux Desktop Consortium
 - Kicks-off its internal desktop conversion
- 2005: IBM donates intellectual capital
 - 500 Patents to Open-Source Developers
- 2007: IBM joins OpenOffice Team

Major human capital investment too

- Committed 600+ people, all dedicated to open-source development
- Actively contributing to Linux and over 150 other open source projects and communities
 - Apache and Apache projects
 - Eclipse
 - Mozilla Firefox
 - OpenOffice.org
 - Samba

Source: “IBM & the Linux Community”,

<http://www-03.ibm.com/linux/community.html>

- Linux Technology Center (LTC)
 - Houses the 600+ people working on open-source initiatives
 - IBM Technical competency center for Linux
 - <http://www-03.ibm.com/linux/ltc/index.html>
- Linux Information Center (LIC)
 - Dedicated to bringing Linux technology to the marketplace
 - Helps new midmarket customers looking to deploy Linux solutions
 - Assists BPs seeking to develop and deliver Linux-based integrated solutions
 - <http://www-03.ibm.com/linux/lic.html>

- **Software Freedom Law Center**
 - Legal representation and related services to protect and advance Free, Libre and Open Source Software (FLOSS)
 - Represents the best in well-established free software and open source projects
- **Open Invention Network**
 - Intellectual property company formed to promote Linux through patent utilization, creating a collaborative ecosystem
- **Free Software Foundation**
 - Mission is to preserve, protect, and promote the freedom to freely utilize software

Focused Linux investment yields

- All IBM servers supporting the Linux operating system
- 500+ IBM software products on Linux
- A full line of implementation, support, and migration services for Linux
- Lotus software brand supports the three major Linux flavors

The Products: A Quick Overview



- First build R5
 - Announced at Lotusphere by then Lotus head, Jeff Papows
- Supports RHEL and SuSE
 - x86 & zLinux platforms
- Domino 8.5 on zLinux is 64 bit
 - Offers greater scalability
 - Internal tests show: ~100,000 users supported on 1 Linux image (6 DPARs)
- Significant performance gains with each new release
- Easily run multiple Domino releases or partitioned servers on the same box

- Product verticals running Domino apps
 - Sales force automation
 - Project management
 - Customer relationship management
 - Interactive Web-based forms
 - Resource management
- Best practice enabled Domino apps are platform agnostic
 - Very portable
 - Makes for easy platform migrations

- Best of breed hardware
- System z: the mainframe setting the bar
 - Virtualization and lowest overhead cost
- Most robust I/O infrastructure of any Domino platform
- Best power/cooling performance of any Domino platform
- Largest scalability of any Domino platform

- First Linux client – N7
- Significant improvements N8.0
- Supports all three major Linux distros
- Minimal feature lag across all releases
- Installs client in multi-user mode only
- Swiftfile inclusion remains an enigma
 - If supportive, promote my IdeaJam request
 - <http://www.ideajam.net/IdeaJam/P/ij.nsf/0/8CFDC7D088F1DBE6862573>
 - <http://tinyurl.com/yagw2vk>

- Supports Domino on Linux
- Supports Linux browser access
 - Can be 100% Linux-based
- Three operating modes – New in 8.5
 - Full, Lite, and Ultralite (iPhone interface)
- Increased control through Policy docs
- Can force remote desktop data cleanse
 - Important for regulated companies' users
- Included with Domino
- Impressive browser version checking
 - Reduces Help Desk calls



- What is OCCS?
 - Security-rich, cost-effective Microsoft® desktop alternative
 - Customized to meet your business requirements
 - Options include:
 - Variety of IBM products (on the desktop and server)
 - Conceptually, OCCS works with different operating systems
 - Focus is Linux due to it being a low-cost environment
 - Built on Lotus Expeditor, which is based on the open source Eclipse Rich Client Platform
- More later in the Desktop section

- Originally developed as Nitix by Net Integration – an autonomic Linux-OS
- IBM acquired Jan 2008
 - Re-branded as Lotus Foundations
- Small business gem
 - Stand-alone turn-key Linux-based appliance

Competes against Microsoft SBS and Windows Essential Business Server

- Both still incur significant hardware and software upgrade costs against Foundations
- Over 1000 MS BPs joined as Foundations BPs

- Lotus Foundations Start
 - Stand-alone appliance
 - 5 to 500 Employees
- Lotus Foundations Branch Office
 - Expand your Domino infrastructure
 - Attaches to your existing Notes domain
- Lotus Foundations Reach
 - Announced Jul 2009
 - Adds VoIP and Sametime support
- Foundations Product Page
 - <http://www.lotus.com/foundations>

- IBM Sametime UC²™ capabilities in a single appliance
 - Plus, ability to access these capabilities from a mobile device
 - Remote users have easier access to data
- Excellent for shops that have –
 - Limited IT skills
 - Smaller budgets
- Expediency
 - Install and configure your entire UC environment in a system small enough to fit under a desk—in an hour

Several telephony partners lined-up early, extending their offerings to include Foundations Reach

–EnVision Solutions LLC

- Enhanced SMB collaboration package

–NEC – UNIVERGE Spherical communications

- SMBs and branch offices offerings

–NextiraOne Mexico

- Growing business offering via VoIP

–ShoreTel

- Uses its VoIP platform for SMBs

–Speech Design

- Mobile Unified Communications appliance



Opportunities to Increase adoption

–Journaling

- On-the-wire capture of all e-mail sent
- Regulated firms need to verify their specific requirements for message capture with their Security officer and their Legal department
- Due in next major release

–Clustering

- Also slated for a future release
- Critical for some smaller businesses
- Being tested now

- Sametime Connect
- Sametime Embedded
- Sametime Unyte – (LotusLive Meetings)
 - My 64-bit Ubuntu Firefox 3.x browser works!
- Sametime Unified Telephony (SUT)
 - Telephony features and multi-PBX telephony
 - Demoed today via Ron Sebastian during the Opening Sesison
- Sametime Server

- Eclipse-based office productivity suite
 - Document editor, spreadsheet, presentation
 - Runs stand-alone or Notes embedded
 - Supports all Lotus Notes platforms
 - Includes Debian and Red Hat packages
- Cross-product feature lag eliminated in v1.2 (2009)
 - All Symphony releases now have the exact same feature set across builds
- Big hit at CeBIT 2009
 - Largest computer show in Europe loved Symphony

Symphony Targets Enterprise

Version 1.3 provides significant enhancements

- Wide-range of functions
- 90-95% of enterprise end-users can utilize
- Support for complex macros
- Pivot tables (pivot tables in Excel) debut
- New File formats
- Better cross-file format conversions

- Extend Symphony programmatically
 - Small snap-in modules offering a simple capability enhancement
 - Three examples include:
 - IBM Lotus Symphony Diff plug-in
 - IBM Lotus Symphony SideNote plug-in
 - Writer2Wiki plug-in
- Full list of available plugins
 - <http://symphony.lotus.com/software/lotus/symphony/plugin.nsf/>
 - Most plugins work on all Symphony flavors
 - Be careful and mind the respective OS requirement(s)

- IBM Business Process Accelerator
- IBM Content Manager Collaboration Ed.
- Lotus Enterprise Integrator
- Lotus Expeditor
- Lotus Learning Management System
- Lotus Mobile Connect
 - Big buzz around this product with release of 8.5.1
- Lotus Web Content Management
- Lotus Workflow

Lotus Middleware on Linux

- IBM offers 500 middleware products
 - All Linux ready
 - Across all six brands and five platforms
- Lotus middleware solutions provide:
 - System x - 117 products
 - System p – 3
 - System i – 1
 - System z – 30
 - Power – 4

Source: *IBM Middleware Available on Linux*, 23 Feb 2009 edition

A Value Proposition via Cost Saves



- How can we save money with Lotus on Linux?
- Is anyone already using it?



- Infrastructure
 - Leverage mainframe or server consolidation
 - Covered within this section
- Desktop Transformation
 - Review provisioned users and respective configuration
- Licensing Analysis
 - Who is using what and why?
- Open Standards - Application Development:
 - Flexibility, choice, integration, avoiding forced vendor lock-in

Note: *Covered indirectly herein, due to time constraints*

- We saw what Lotus provides to the open source movement; what does Lotus receive in return?
 - Stability of the operating system
 - Lower cost of ownership
 - Reliability
 - Availability
 - Manageability
 - Powerful remote management
- That's just the beginning...

Maintenance

- Provides boot-free patches
 - Creates increased up-time
- Avoid the monthly MS patch-night pain
- File system stays defragmented by default
 - “compact -c” no longer impacts performance
 - Avoid defragmenting filesystems and NSFs
- Shops simply setup and run their business
 - Leave the world of “break-fix” support
 - Enter the world of planning and evolving IT



- Licenses

- No additional server CALs required
- OS with support can cost less

- Hardware

- Requires less memory for the same load
- Extend servers' lifespan
- Run Linux on existing hardware and see benefit
- Most server OEMs support Linux on their hardware
- Economical remote office capability
- Cost-effective Domino clustering

Increased Security = Opportunity

- Outside the firewall capability
- Platform of choice for hostile environments
- Network security built right-into the kernel
- Low-cost, stable, and secure alternative

Acquire quality data to assess your risk

- The Institute for Internal Auditors provides specified data:
 - Risk of security problems from simple denial of service attacks
 - Unauthorized usage and data alteration
 - IT Risk assessment guide
- Their site: <http://www.theiia.org>



But Don't Take My Word For It...

Take A Message: It's Lotus Vs. Exchange

- *“By the time an enterprise has purchased Exchange and the CALs for it, plus the Windows Server license and CALs for Windows Server, costs begin to snowball.”*
- *“The edge in pricing, when all is factored in, goes to Lotus. You simply get more bang for your buck.”*

<http://www.crn.com/mobile/217800062>

Lotus Foundations Winning Fans Among Resellers

- *“Solution providers also say cost has been a factor in their embrace of Lotus Foundations over Microsoft SBS.”*
- *“Customers would bump up against the 50-user limit of Microsoft SBS and faced sticker shock when told how much it would cost to upgrade to standard Windows Server, Exchange and other Microsoft products.”*
- Tim Miller, Executive Vice President of Intellectual Property at EnVision Solutions

Creating business saves for customers

–“*An EnVision engineer had been testing Lotus Foundations and suggested the customer try it instead -- a plan that ultimately saved the customer about US\$10,000 (£285k) in up-front licensing costs and US\$20,000 (£569k) a year in ongoing expenses.*”

–Source links

- <http://www.crn.com/software/218401340>
- <http://www.bilal.ca/microsoft-sbs-fail-lotus-foundations/>

A Value Proposition via Cost Saves – Two Case Studies...



- Gruppo Amadori rolls out Linux-based desktops and servers to cut costs
 - Leading Italian food distribution firm
 - 1,000 of 6,000 employees use PCs
 - Migrated from Microsoft Exchange
 - <http://www-03.ibm.com/press/us/en/pressrelease/27561.wss>
- Products Utilized
 - Linux on Desktop and Servers
 - Lotus Notes and Domino
 - Lotus Symphony
 - Lotus Quickr

- *“Our strategy is to focus on Linux first and foremost, taking a practical and pragmatic approach.”*
 - *“For us, the Linux environment is the right choice for very focused applications and is more cost effective than Microsoft.”*
- Gianluca Giovannetti, CIO and Director of Organization, Gruppo Amadori

- Customer Profile
 - Established training firm in New York
 - 25 remote business skills trainers, plus ten full-time on-site
 - Concerned with stability, service quality, excessive crashes
- Solution requires many capabilities
 - Absolutely eliminate the nightly failed backups
 - DNS, web hosting, SMTP, file server, roaming Windows profiles, backup server, application server, PDC
 - Domino server for mail and iNotes
 - Distribute server operations to minimize any outage impact
- Question: How many Windows servers installed?

- Answer: Zero. Yes, no Windows servers
- Big customer surprise – Windows roaming profiles
 - Worked great with Linux as the PDC
 - Samba to the rescue
 - Even letter-based mapped drives, and applications
 - *The end-users never knew they had a Windows-free back-end*
 - *Except that the system was always available*
- Further proof that end-users want a solution that works
 - They care less what is driving it
 - Provide features and functions that meet their needs, that are reliable, and let them do their job
 - Better products—properly configured—make better users

- Initially, client mandated, “No Notes, only Outlook”
 - Then, “If you even suggest to switch Outlook, you are fired!”
- Tried it their way...
 - Massive downtime, lost messages, viruses, productivity drain
 - Huge cost to the business and incredible maintenance effort
- Upgraded back-end to Domino
 - Front-end with DAMO
 - Better, but not great
- Switched to Notes on Desktop
 - Customer never happier

- **Avoided**
 - Maintenance
 - System defrag
 - OS level anti-virus
 - Missed back-ups
 - Downtime
- **Gained**
 - Stability
 - New capabilities beyond previous solution, allowing for creative business planning
- **Savings**
 - Tens of thousands (GBP) in lost down-time, increased morale and efficiency, team worked less hours = very happy owner

Desktop Discussion



“Linux on the Desktop is providing great value and cost reductions to companies at a time when they need it the most,”

—Bob Sutor, VP of Linux and open source, IBM Software Group.

- LIC chooses Linux to run their Open client
 - Low-cost price point Linux provides is too attractive to ignore
- IBM Lotus can provide end-to-end Linux solution
 - Native Linux support: Notes, Symphony, embedded Sametime
 - Expeditor client to run web apps
 - All middleware apps: Portal, Connections, Quickr are Linux-browser compatible
 - Linux provides Firefox
- Desktop conversion is possible for all businesses
 - IBM Windows to Linux desktop migration project – 30%
 - Have over 30k desktops running Linux currently, and growing

- Compiled as a x86 (32-bit) option
 - 64-bit has on road-map
 - Portal and Domino offer 64-bit
 - Lotus receives a low number of 64-bit desktop app requests
- A word of caution
 - Open client may not be for every user*
 - Choose a pilot group for initial deployments
 - Think about who best can use the product
- If Virtualizing your desktop...
 - Avoid the 64-bit option on the virtual-side
 - For best performance, stay 32-bit

Where is the Opportunity?

- Decrease desktop licenses
 - Symphony replaces Office
 - Notes replaces Outlook
- Combining Symphony with Linux is the ultimate cost-saving combination
 - Replacing just a software application, creates a suboptimal save
 - A desktop OS license is still required
 - Linux provides two key apps to reduce costs
 - Notes
 - Symphony
- Ultimately, save more than a license

UK Firms Save Big with Lotus Symphony 1.3

- The John Lewis Partnership (JLP), owns Waitrose, John Lewis and Greenbee: plans 8k user Symphony roll-out
- Cluttons—partnership of chartered surveyors—plans switch from Office

“The opportunity to use fully supported office productivity tools as part of the deployment of Lotus Notes 8.5 was too good an opportunity to be missed. We plan to use the cost saving to further invest in Lotus productivity tool sets.” --Mark Clemence, Cluttons IT Director

- <https://www.ibm.com/developerworks/mydeveloperworks/blog>

Novell SLED (SuSE Linux for Desktop)

- “You can save nearly 90% when choosing SLED over Vista and Office”
 - Lotus Symphony fits-in nicely here as well
 - <http://www.novell.com/products/desktop/lower-cost.html>
 - OpenXML Translator – Handling proprietary formats
 - MS Office 2007 add-in
 - Open MS OpenXML files in Symphony or Open Office
 - Novell provides gratis
 - [http://download.novell.com/Download?buildid=NADNBLbBgP`](http://download.novell.com/Download?buildid=NADNBLbBgP)
- ~

- Ubuntu: a favorite distro, but lacked support services
 - Left users on their own, or to spend time perusing forums for an answer
 - Time-intensive approach for customers
- Two new offerings by Canonical:
 - Desktop Support
 - http://blogs.computerworld.com/canonical_to_offer_desktop_support
 - Desktop Migration Services
 - <http://www.workswithu.com/2009/07/30/canonical-launching-switch-to-ubuntu>



- Big partnership with IBM to help promote Linux
- Increasing support options and coupling with Doming
- Excellent TCO calculator
 - Provides all costs for licenses utilized within their calculations
 - <http://www.compariv.com/redhat/tcoCalculator.jsp>
- Detailed white paper on desktop migration
 - http://www.lotusonredhat.com/RH_LinuxBenefits_WP.pdf
 - Linux alternatives for common Windows applications
 - Windows-Linux interoperability
 - Thorough TCO review

License Analysis



Project Liberate

- Customers with Microsoft Enterprise Agreements might be able to save up to 40% or more on the cost of their renewal through this “no-charge” evaluation of their current Enterprise Agreement
- Depart from Enterprise agreements
 - Viewed as “worry-free”
 - Large percentage don't need it, as they don't use what they purchased
 - “Select agreement” creates a cost save
 - Simply keep an inventory to stay on-track

- Value Proposition:
 - Potentially reduce your Microsoft bill, utilizing your same in-use product set, but via alternative buying options
 - Self-funding savings allow innovation and productivity initiatives
 - Microsoft bundles dependency reduction: buy only what you need
 - Fee-free consulting engagement
- To engage the team
 - <http://www.ibm.com/software/info/liberate>

- How many users really need Office Professional?
- Do you really need XP Upgrade in your EA agreement?
 - New desktops come with an OEM license for the current OS
 - You get to downgrade the license with a call to MS
 - If you have any type of volume plan with MS, you get to re-image that machine
 - So, why pay for an upgrade license via EA when you already have a license?
 - Creates redundant revenue expenditures

Some Third-party ISV Linux Support



- Section provides a comprehensive list of Business Partners that Support:
 - Notes on Linux
 - Domino on Linux
 - Sametime on Linux
 - Linux browser access
- Seeking to work with Linux? Rest easy –
 - If you have their tools
 - Or are thinking of utilizing them

Penguin-Friendly BPs



AedifiComm

<http://www.aedificomm.com>

Ardexus

<http://www.ardexus.com>

Avalon Business Systems

<http://www.AvaBiz.com>

BCC

<http://www.bcc.biz>

Canonical – Makers of Ubuntu

<http://www.canonical.com>

Cedros

<http://www.cedros.com>

Connectria

<http://www.connectria.com>

Elguji

<http://www.Elguji.com>

Ephox

<http://www.ephox.com>

eProductivity

<http://www.eProductivity.com>

Extracomm, Inc.

<http://www.extracomm.com>

Group Technologies – Group Business Software AG

<http://www.group-technologies.com>

GSX Groupware Solutions

<http://www.gsx.net>

Innovative Ideas Unlimited, Inc.

<http://www.iiui.com>

Integra for Notes

<http://www.integra4notes.com>

Information Solutions Coordinators

<http://www.iscoord.com>



Penguin-Friendly BPs, Pg. 2



Intravision

<http://www.intravision.com>

Logic Springs Technologies

<http://www.departmentcalendar.com>

Mainsoft

<http://www.mainsoft.com>

Martin-Scott

<http://www.martinscott.com>

MayFlower Software

<http://www.maysoft.com>

Navisite

<http://www.navisite.com>

Permesssa

<http://www.permessa.com>

PistolStar, Inc.

<http://www.pistolstar.com>

Polymorph Ltd --

<http://www.polymorph.co.uk>

Rpost

<http://www.rpost.com>

Sherpa

<http://www.sherpasoftware.com>

Titan Solutions Group

<http://www.titansolutions.com>

Trend Micro

<http://www.trendmicro.com>

Trust Factory

<http://www.trust-factory.com>

Vigilus

<http://www.vigilus.net>

Waterford Technologies

<http://www.waterfordtechnologies.com/>

WWoW Communications

<http://www.wwow.net/>

PSC -- <http://www.psclistsens.com/>

Ytria -- <http://www.ytria.com>



Final Thoughts...



- Decrease OS costs
- Decrease CALs
- Decrease Office licenses for some to all of your staff
- MS license negotiation leverage
- Decrease in Domino system maintenance
- Servers that provide exceptional uptime
- Easier administration (avoid patch night worries)
- Helps avoid the break-fix recursive support model

- You can save cash...
 - Through decreasing license costs
 - Presented examples
 - Client anecdotes providing insight
 - Improved stability
- What is keeping you from succeeding here:
 - Do you have any concerns?
 - What would keep you from implementing any of the cost-save items or methodologies?

Additional Resources & Press



- Linux Handbook – IBM Redbook
 - <http://www.redbooks.ibm.com/abstracts/sg247000.html>
 - Still has some good data
- IBM's Linux Site
 - <http://www.ibm.com/linux>
- IBM's LTC public bloggers' assemblage
 - <http://www.planet-ltc.org/>
- Lotus Foundations announcement
 - <http://www-03.ibm.com/press/us/en/pressrelease/28013.wss>
- IBM Open Collaboration Client Solution
 - <http://www.ibm.com/developerworks/lotus/library/occs-overview>
 - Excellent resource, including architecture

- "Should I Renew My Microsoft Enterprise Agreement?"
 - <http://blogs.forrester.com/cio/2009/02/should-i-renew.html>
- Microsoft's software pipeline set to burst
 - MS suggesting to stop testing Vista, wait for Windows 7
 - <http://www.networkworld.com/news/2009/051409-microsoft-te>

IBM Named 2009 CRN Channel Champion

- Top vendor in two categories
 - Collaboration Software
 - Midrange Servers
- Placed top spot in five sub-categories:
 - Data & Information Management
 - Middleware
 - Network Security Software
 - Storage Management Software / Data Protection Software
- Link to article:
 - <http://www-03.ibm.com/press/us/en/pressrelease/26881.wss>

- Red Hat
 - http://www.redhat.com/partners/partnerspotlight/ibm/lotus/live_dvd.html
- Ubuntu
 - <http://people.ubuntu.com/~mnuzum/projects/occs/ubuntu-8.04.1-desktop-i386-customnotes85.iso>
- SuSE
 - <http://www.novell.com/linux/openclienteval/>



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