Introduction	**ECM as part of Information On Demand** **ECM Maturity and Adoption** **Current Portfolio position** **Roadmap** **Vision for ECM**	**Doug Coombs**	**30**
Content	**The Changing Market for Content Management** **The Role of ECM in Collaboration** **ECM user interface for the desktop and the web** **Advanced Search and Analytics**	**Thorsten Zoerner**	**60**
Process	**Activating Content and Business Process Management** **The Roadmap for Content Centric Process Tools including product demonstrations** **IBM Business Process Management Strategy** **What's next for Process?**	**Daniel Crow**	**60**
Compliance	**Control and Enforcement** **Product positioning, roadmap and demonstrations for records and email** **Classification for ECM** **What are eDiscovery and the ECM framework for compliance?**	**Graham Hadingham**	**60**
Platform	**The Repository Roadmap and Federation** **Next Steps for Infrastructure** **Software as a Service** **Portfolio and Vision Re-Visited**	**Doug Coombs**	**30**

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IBM ECM
Content Technologies

Thorsten Zoerner
EMEA ECM Product Marketing
Content Technologies

Information Management software

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Content is a commodity...

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Threats

ECM

Look at BCS...

Content is a commodity

Content anywhere?

Content?

Vs or AND

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Content is a commodity...

...managing it on an enterprise level is an art

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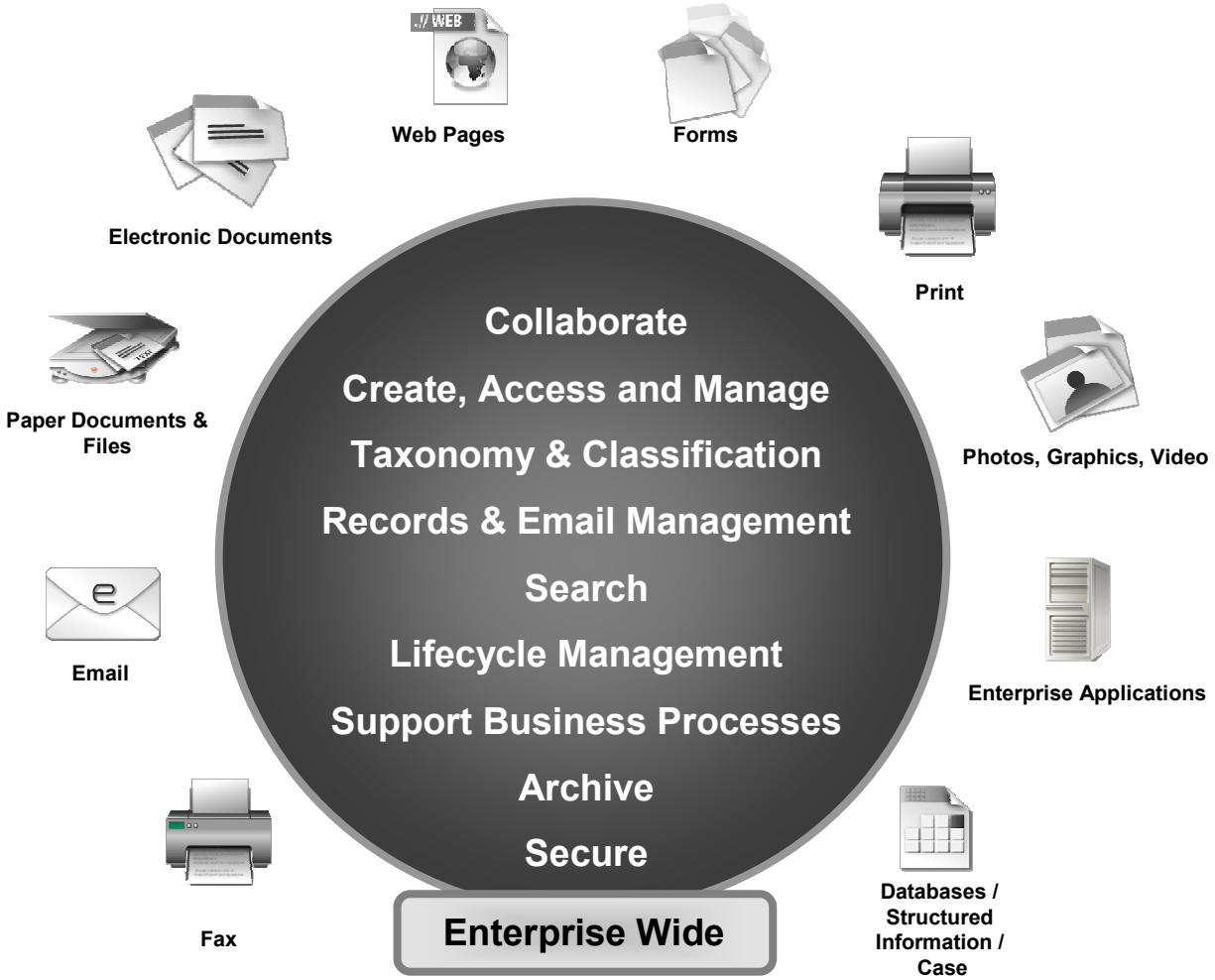
So why invest in Content Management … ?



Content is any unstructured logical entity that has business value.

Content Management is the process of managing content through its lifecycle. From inception through creation, usage, review, storage and dissemination all the way to its destruction.

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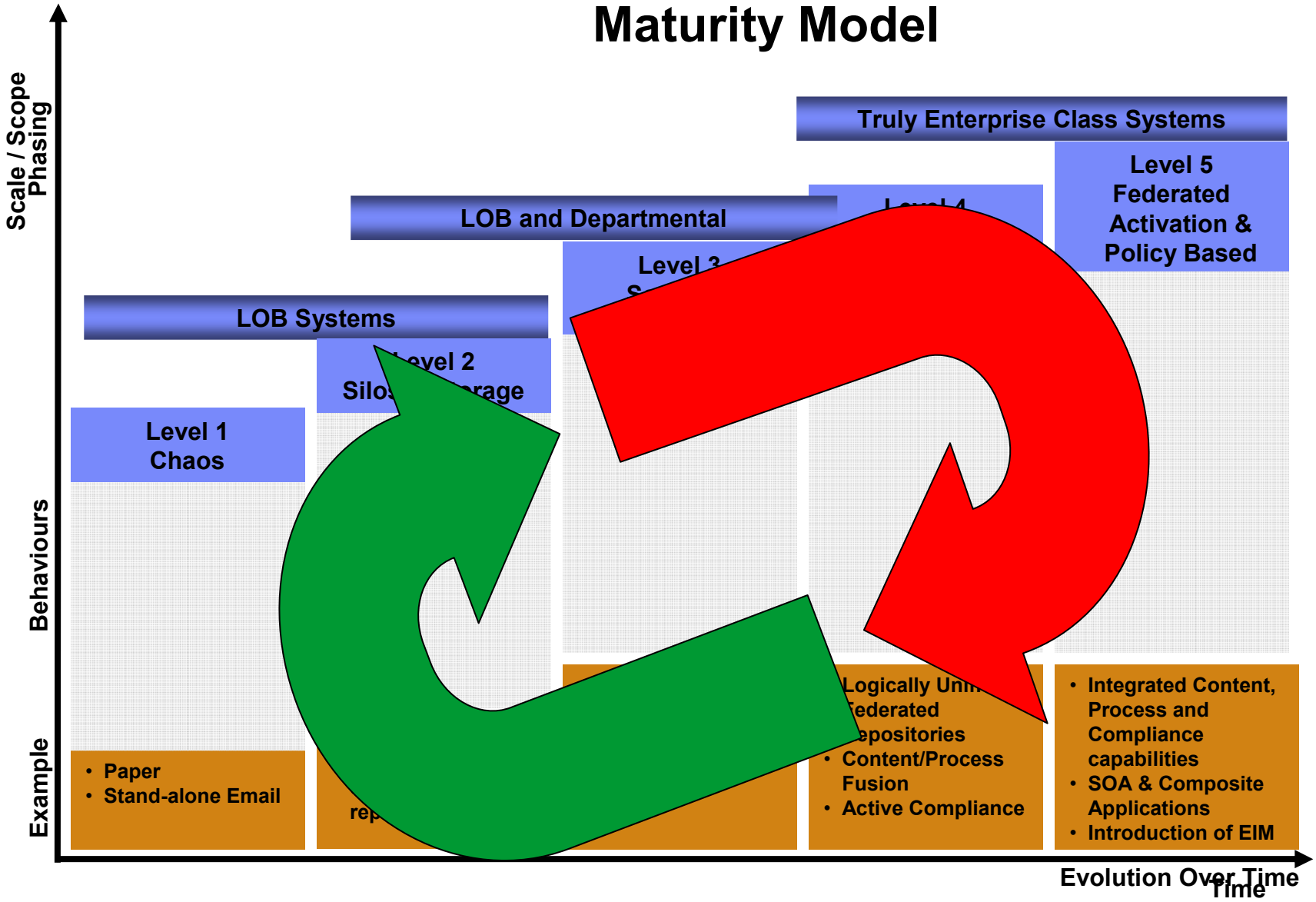
You Have To Climb The Content Management Maturity Model



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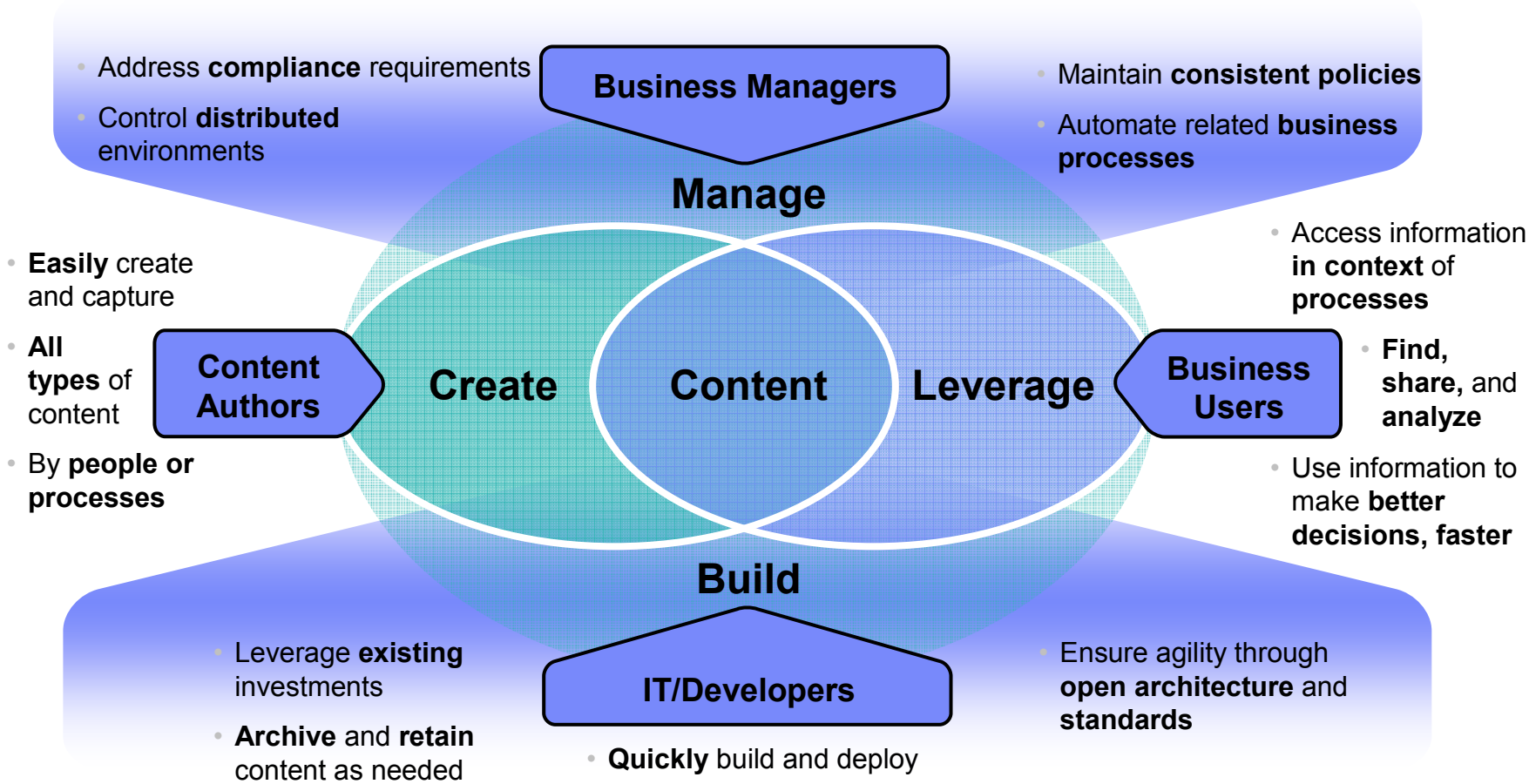
Deliver Solutions and Technology for 4 Key Constituents for ECM in Your Organization



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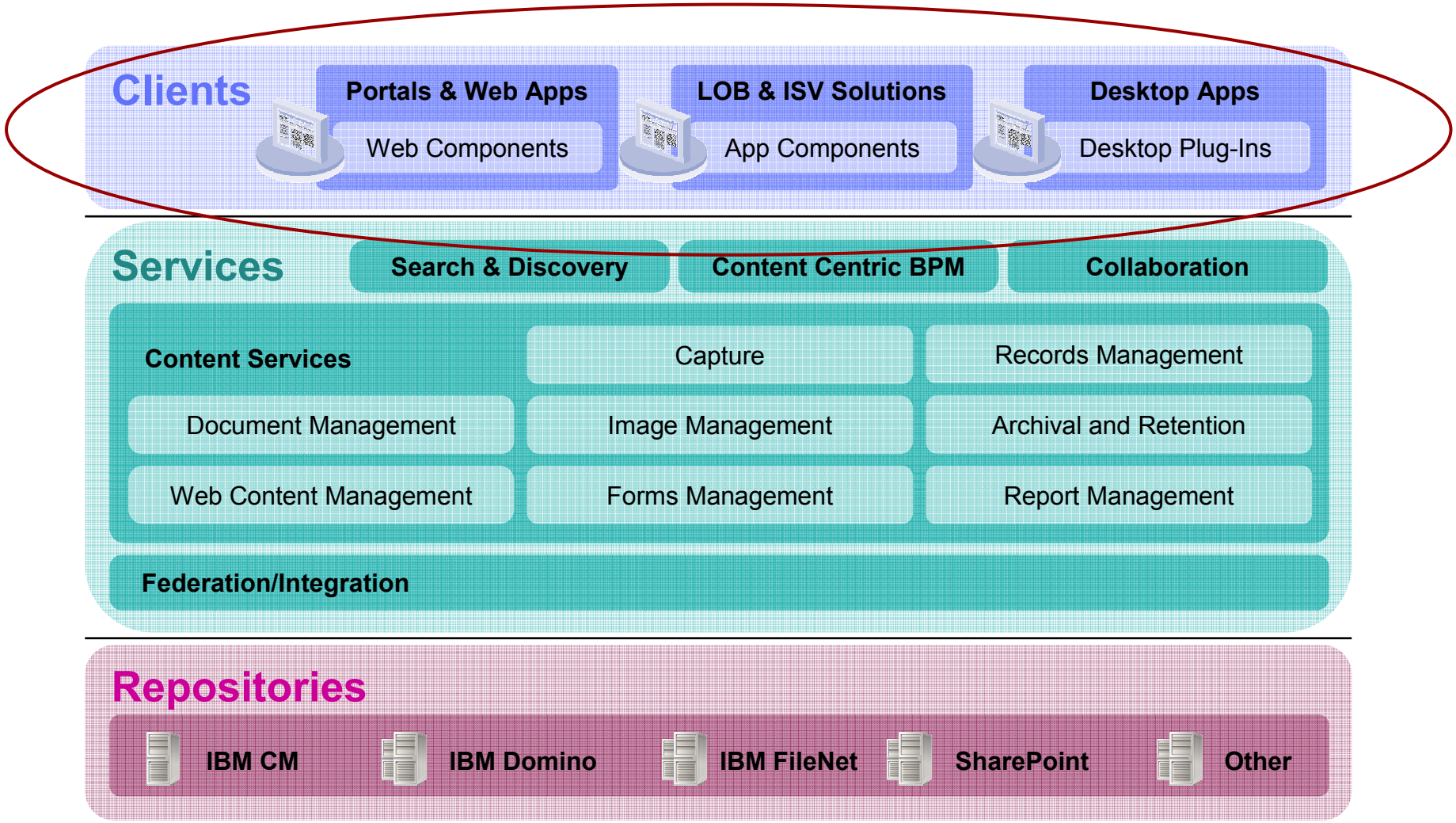
IBM ECM Group Portfolio



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Agenda

- ECM Applications
- Desktop
- Basic Content Services
- Persuasive Content
- Search

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Agenda

- **ECM Applications**
- Basic Content Services
- Desktop
- Persuasive Content
- Search

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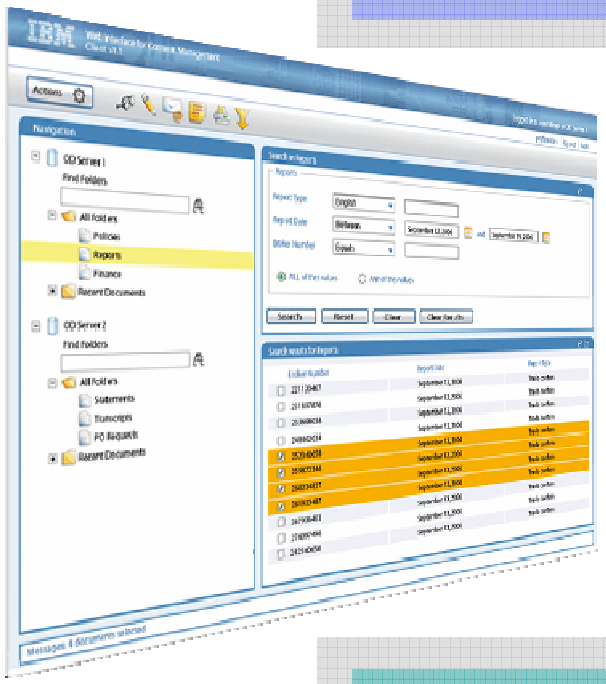
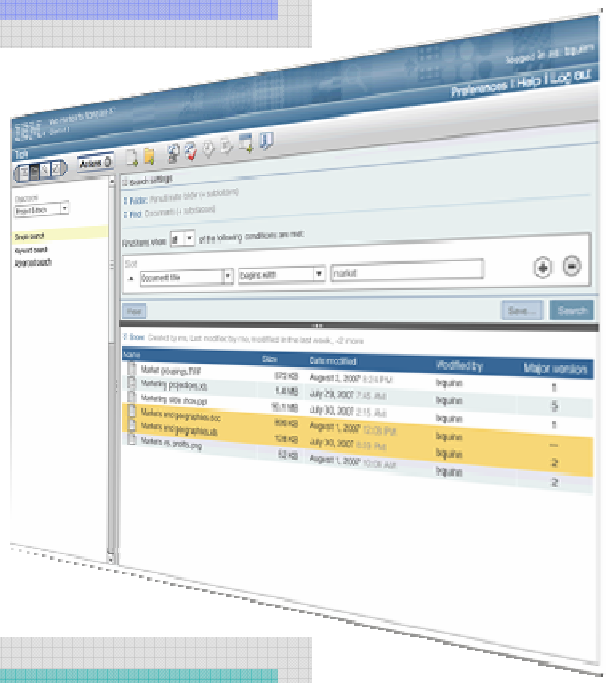
IBM ECM Applications

Common User Interface Architecture

WEBi



Workplace XT



Web 2.0
Ease of Use
Flexibility

Federation/Integration
IBM Information Integration Content Edition

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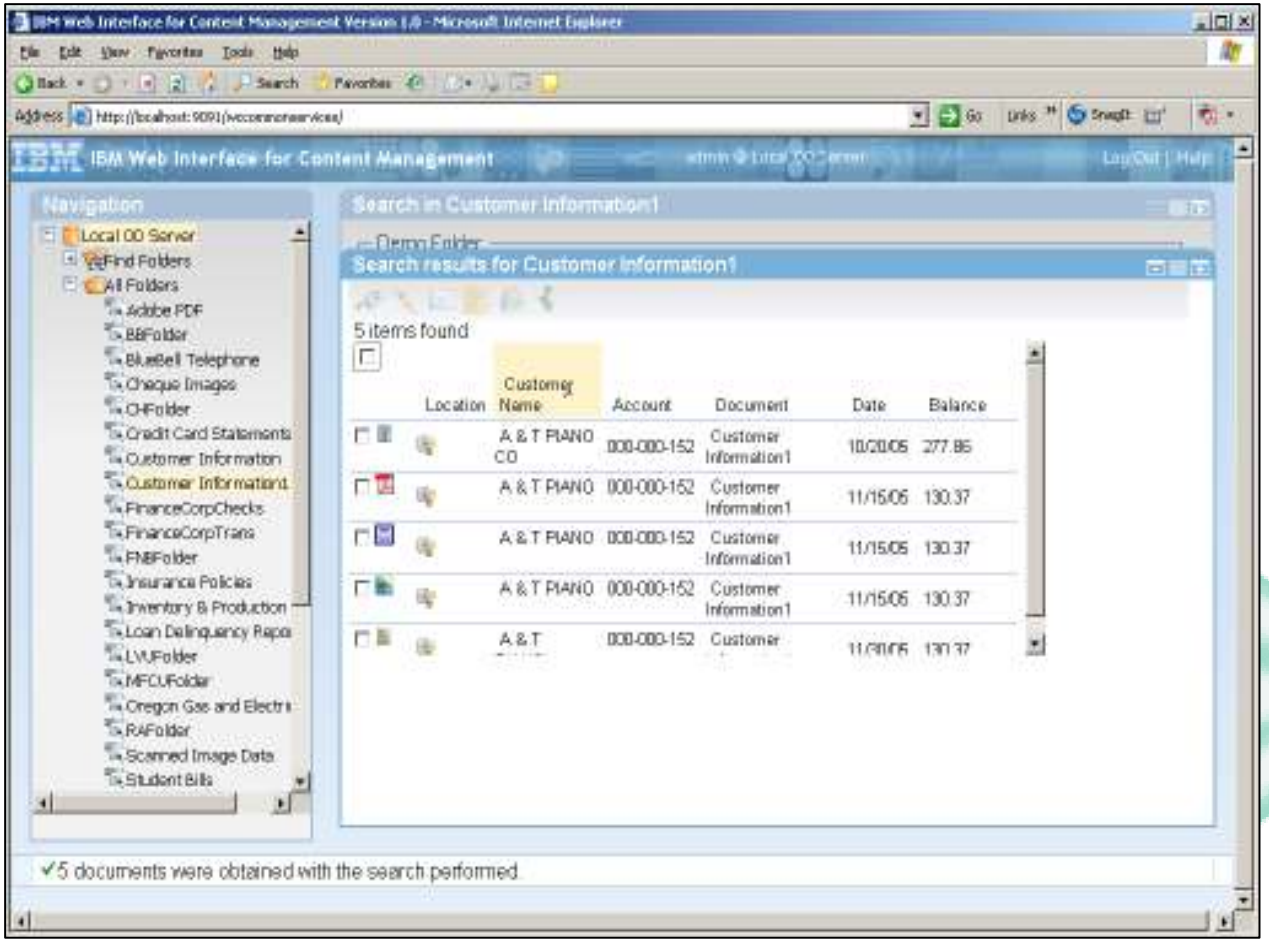
IBM WEBI – OnDemand



Benefits

- Customizable interface (skins)
- Multi-search Predicates
- Parametric Search
- Multiple and Single Selection for viewing and emailing via icons and a toolbar
- Multiple Open Document windows
- Search result beyond single window can be in “Scroll” mode or “Page” mode
- Bi-directional Column Sorting (ascending/descending) from search results list
- Update Values of attributes
- Server Print from search results list
- Annotations (View, Add, Print)

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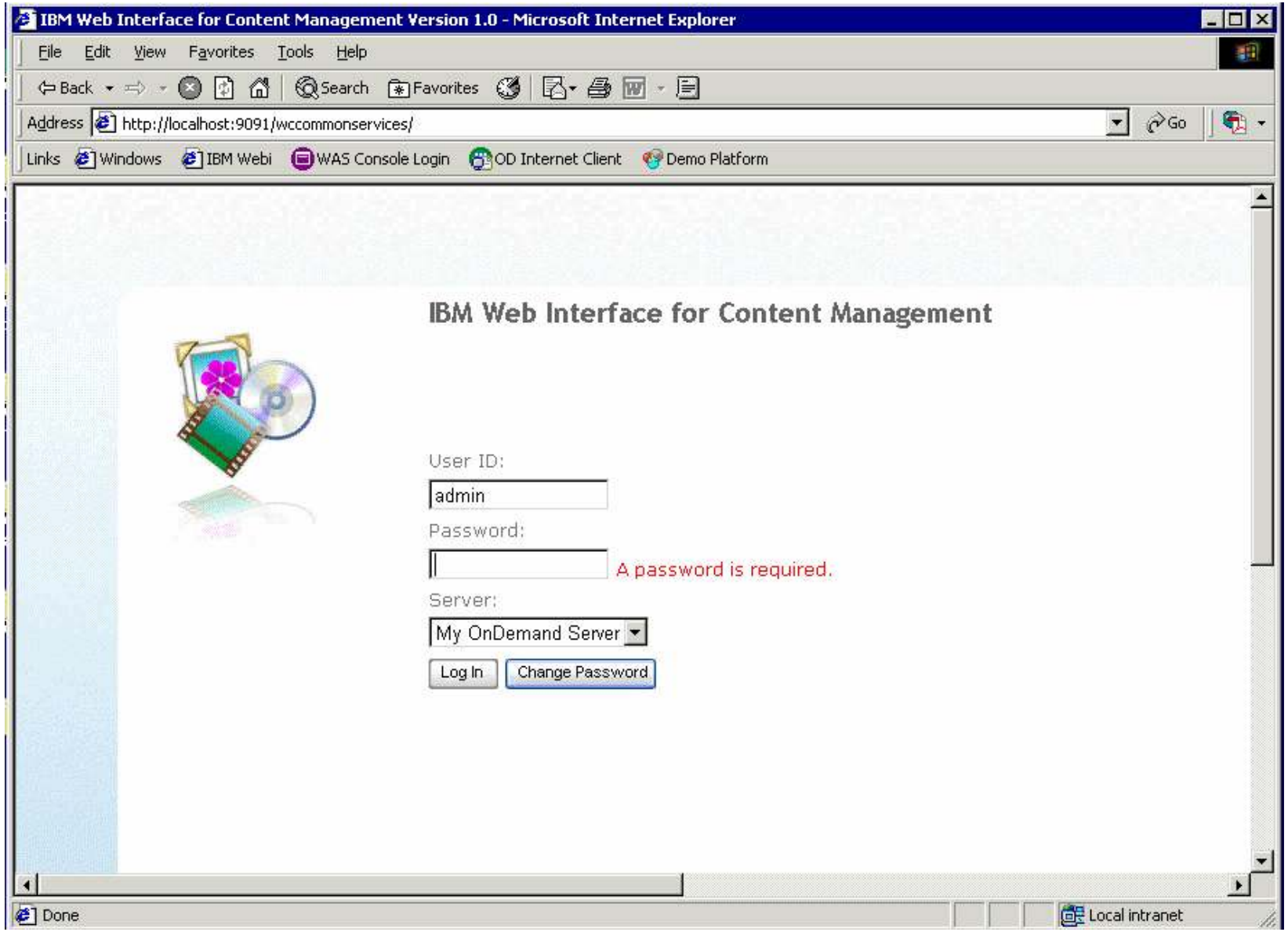

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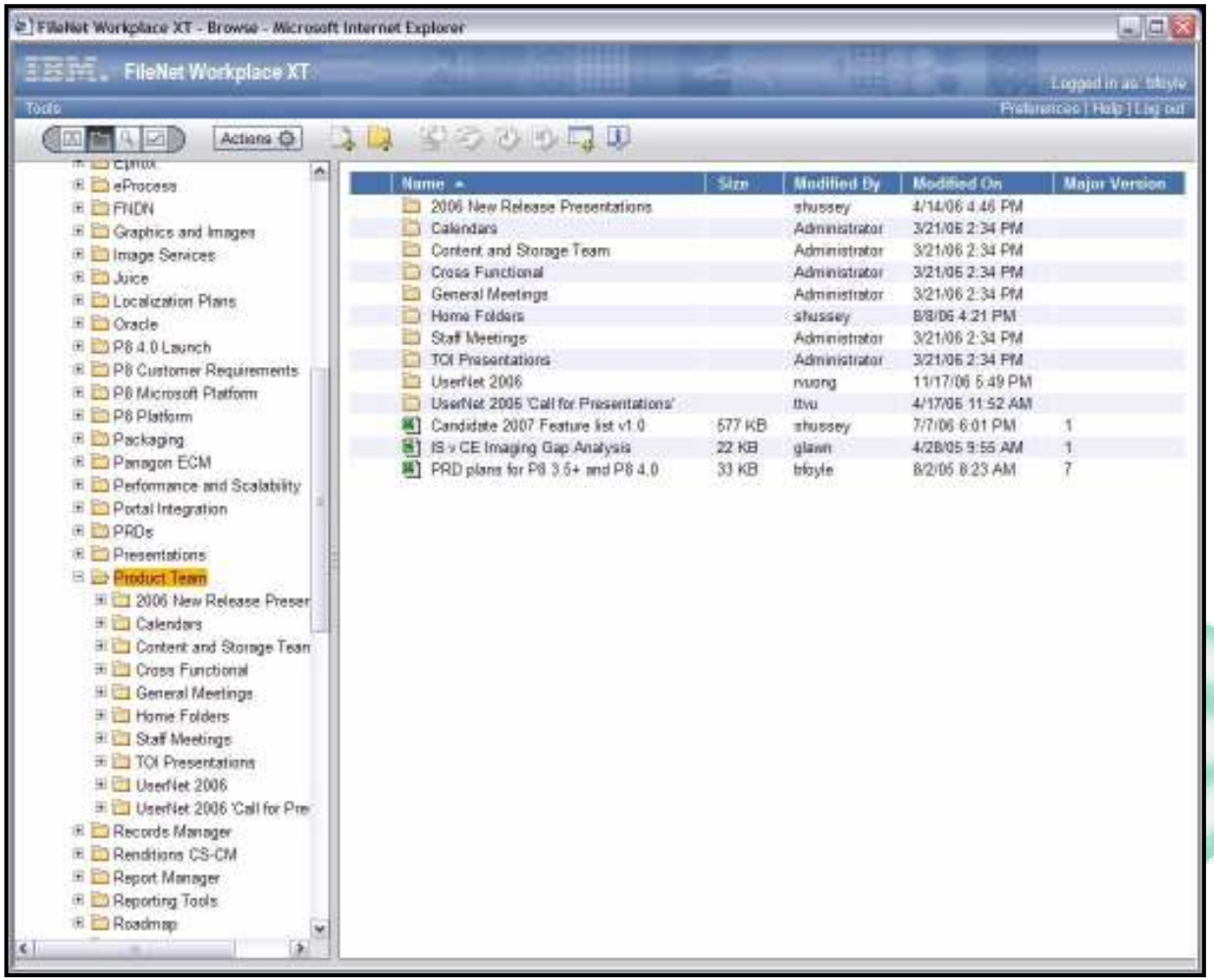
IBM FileNet Workplace XT



Benefits

- Common desktop user experience
- Interactive Toolbar
- Tools menu
- TreeView
- ListView
- Explorer-like selection
- Multiple selections
- Actions menu
- Right-click Context Menu
- Multiple Object Stores
- Favorites including Docs
- AJAX for dynamic updates within page

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Ongoing User Experience

- Workplace XT / Webi
  - Enriched User Experience
  - Drag & Drop
  - More AJAX Enablement
  - Releases every 6 months

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Agenda

- ECM Applications
- **Desktop**
- Basic Content Services
- Persuasive Content
- Search

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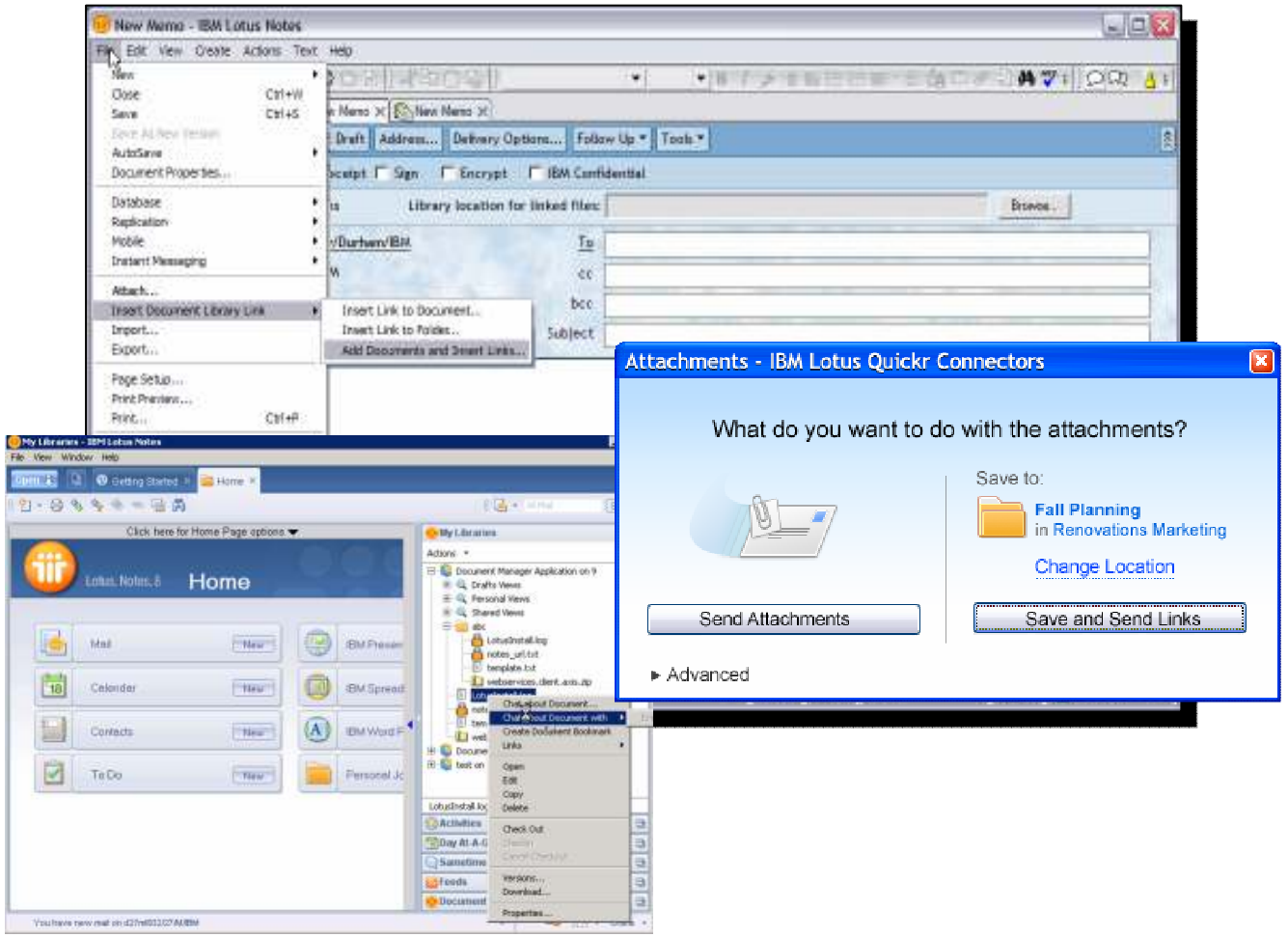
Lotus Notes and Microsoft Outlook Connector

- Open and save attachments into library or team workspace
- Replace e-mail attachments with shared links
- Integrated into file menus and “right click”
- “Reminder” prompt encourages participation



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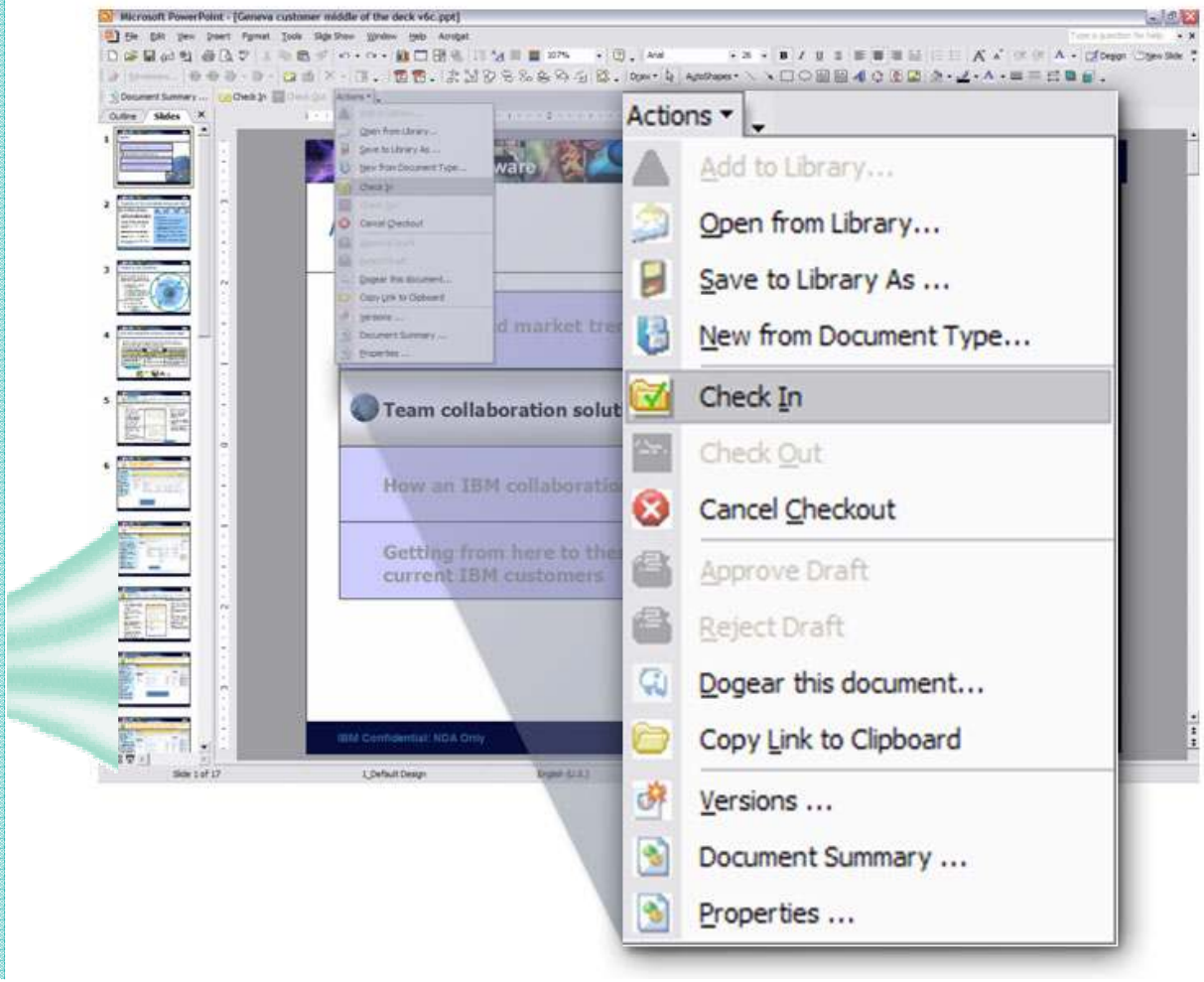
Microsoft Office Connector

- Open and save documents into library or team workspace
- Assign document properties (meta-tags)
- Integrate with workflow for approval routing
- Integrate with “dogear* ” for tagging



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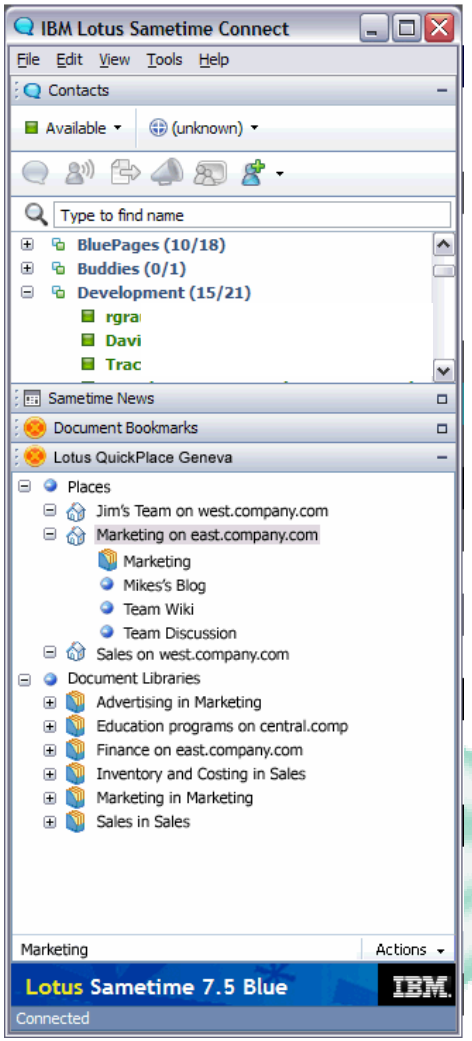
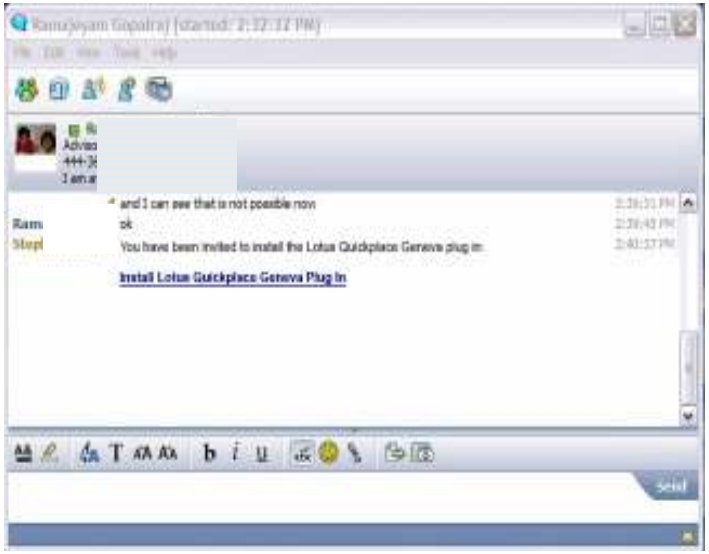
Lotus Sametime Connector



- Navigate content through a simple tree interface
- Drag and drop from local system to libraries and team workspaces
- Integrated action menu
- Quick contextual access to shared documents
- Send links in chats
- Invite colleagues to download the connectors



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Agenda

- ECM Applications
- Desktop
- **Basic Content Services**
- Persuasive Content
- Search

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IBM ECM & Basic Content Services Integration Vision

- Provide a seamless handoff from Microsoft's SharePoint and IBM Lotus Quickr systems to IBM's ECM system of record
  - IBM ECM platform will provide a secure and scalable solution
- Leverage IBM ECM Platform & Expertise
  - Ability to work natively in authoring applications and leverage IBM's ECM backbone
  - Extends advanced content management capabilities to basic content services (BCS) users
- Provide users with a SharePoint/QuickR front end to their ECM system
  - Allows business users to collaborate where people author content

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IBM ECM Connector for SharePoint Document Libraries V2.1

Business Managers

What is it?:

- SharePoint is the initial authoring environment for content, however content will ultimately be swept into and accessed from the IBM ECM repository.

Why?:

- Provides basic content services and collaboration, but customers need a secure and centrally managed repository which will ensure corporate accountability
- Businesses need to store their high value content in a central repository, however provide a seamless and automated way for content to transition into an ECM repository

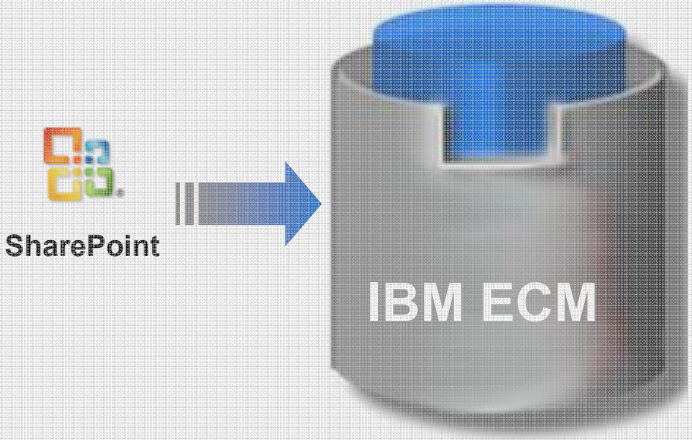
Capabilities:

- SharePoint-created content is moved into and managed by the ECM repository;

  and deleted from SharePoint
- Retention of created-by, modified-by metadata
- “Sweeping" of pre-existing SharePoint site content
- Automatic SharePoint child site discovery
- Central Configuration Utility with common repository

Supports:

- MOSS 2007
- Initial release - Q4 2007 - IBM FileNet P8



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IBM ECM Connector for SharePoint Web Parts V2.1

Business Users

What is it?:

- Collection of Web Parts which allow end users to interact with documents in FileNet P8 directly from the SharePoint browser UI

Why?:

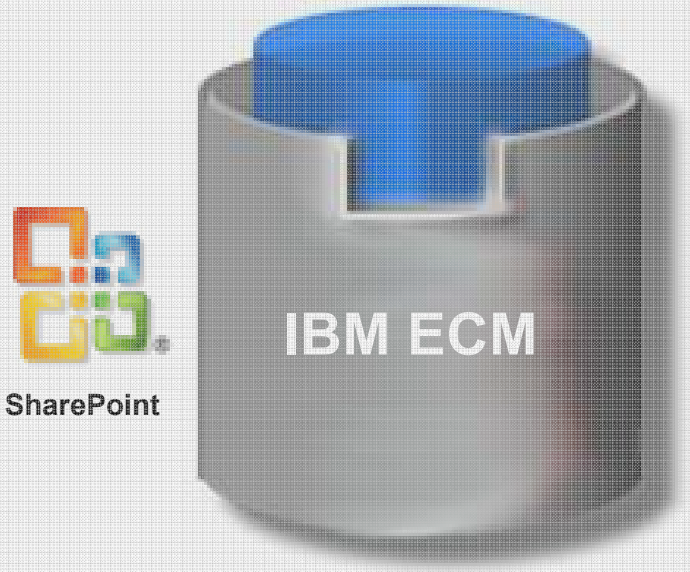
- Merges basic document management capabilities with the Microsoft collaborative user experience
- Real-time access of P8 content from SharePoint

Capabilities:

- View/Browse/Search
- Check in/out
- Upload document
- Edit
- Edit properties
- Delete
- Personal Inbox (workflow tasks)

Supports:

- MOSS 2007
- Initial release – Q4 2007 – IBM FileNet P8



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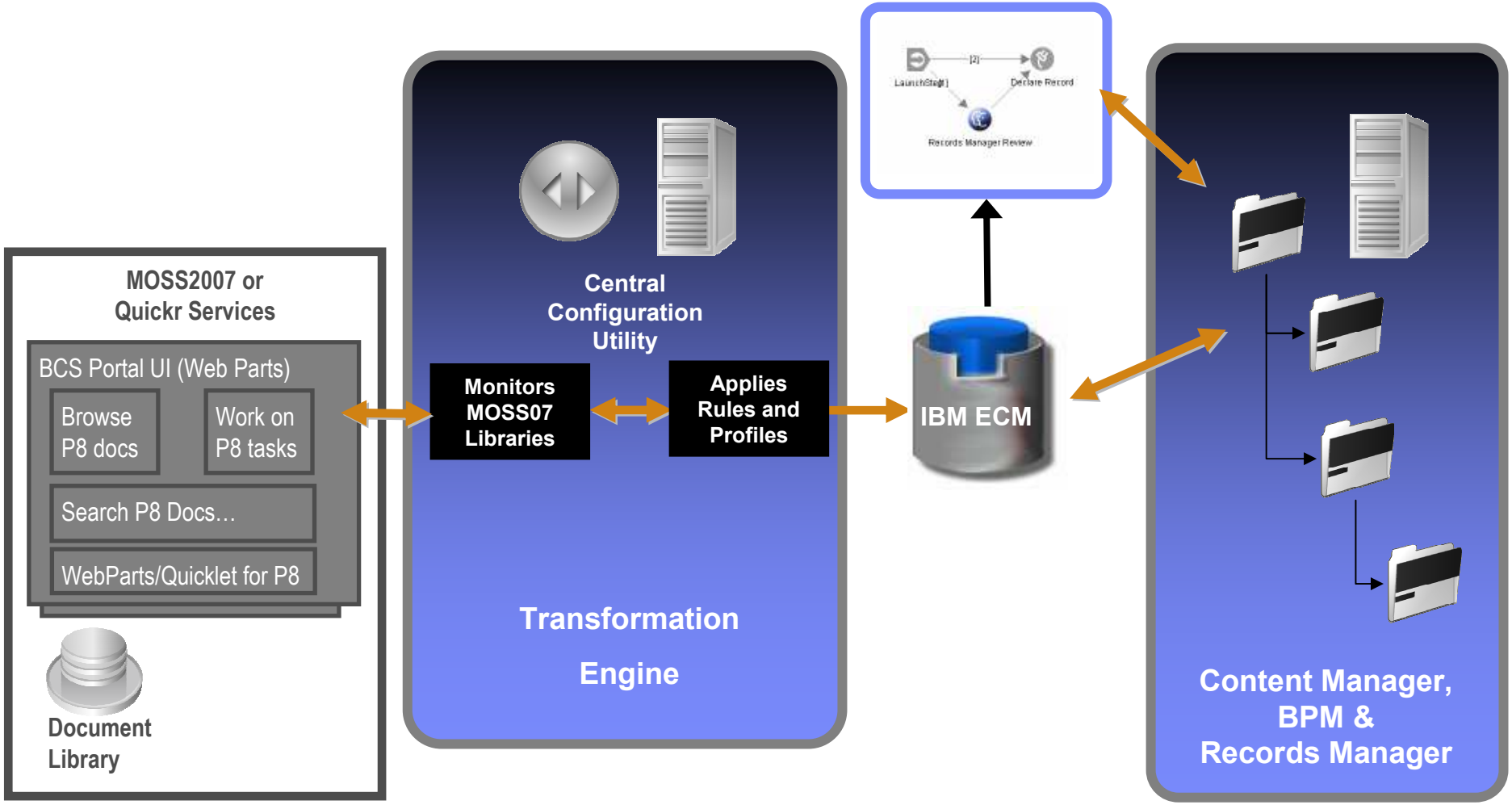
IBM ECM - BCS Connectors Operation



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IBM ECM Connector for SharePoint Web Parts

"Walk-Thru"

SharePoint

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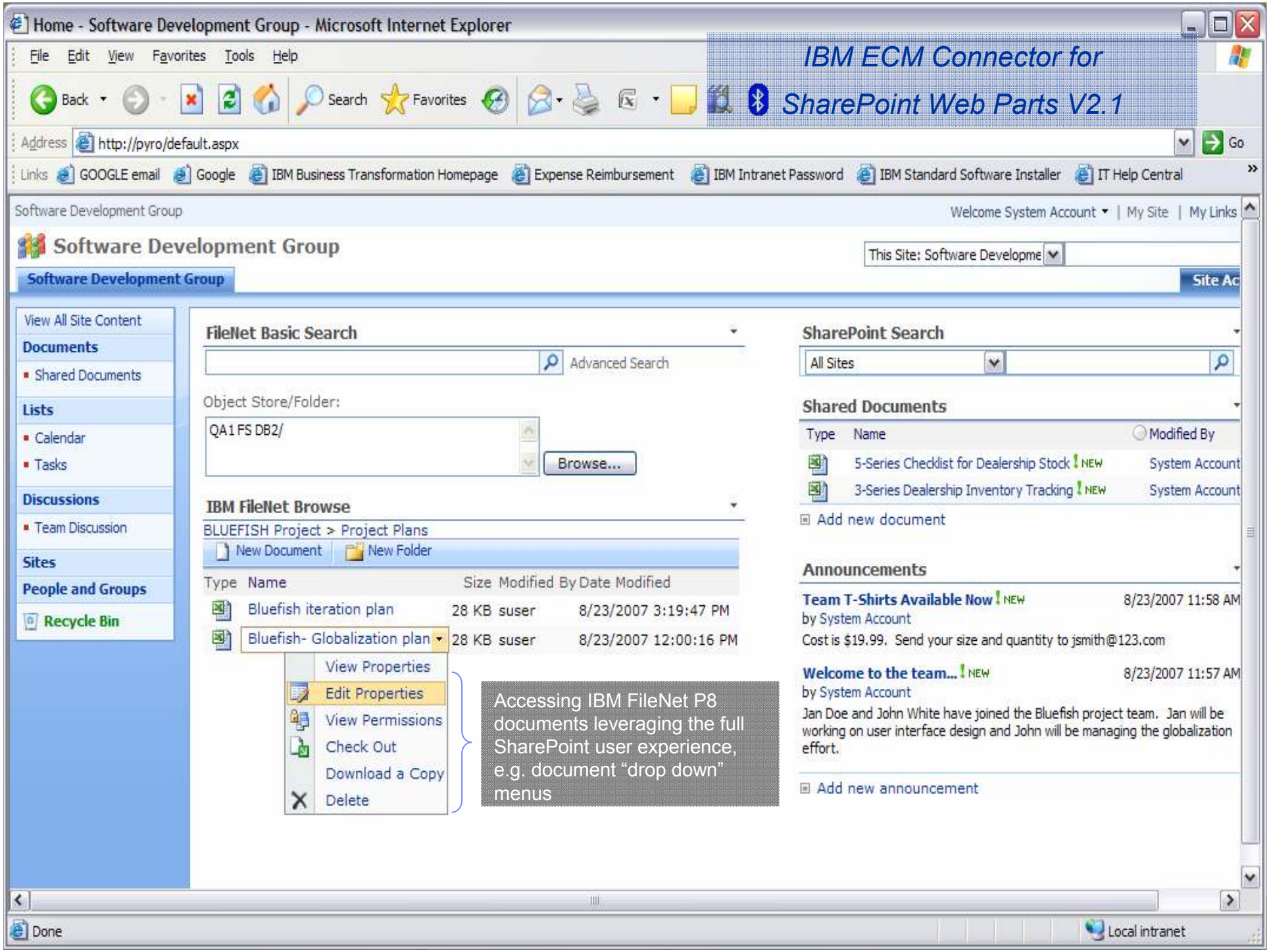
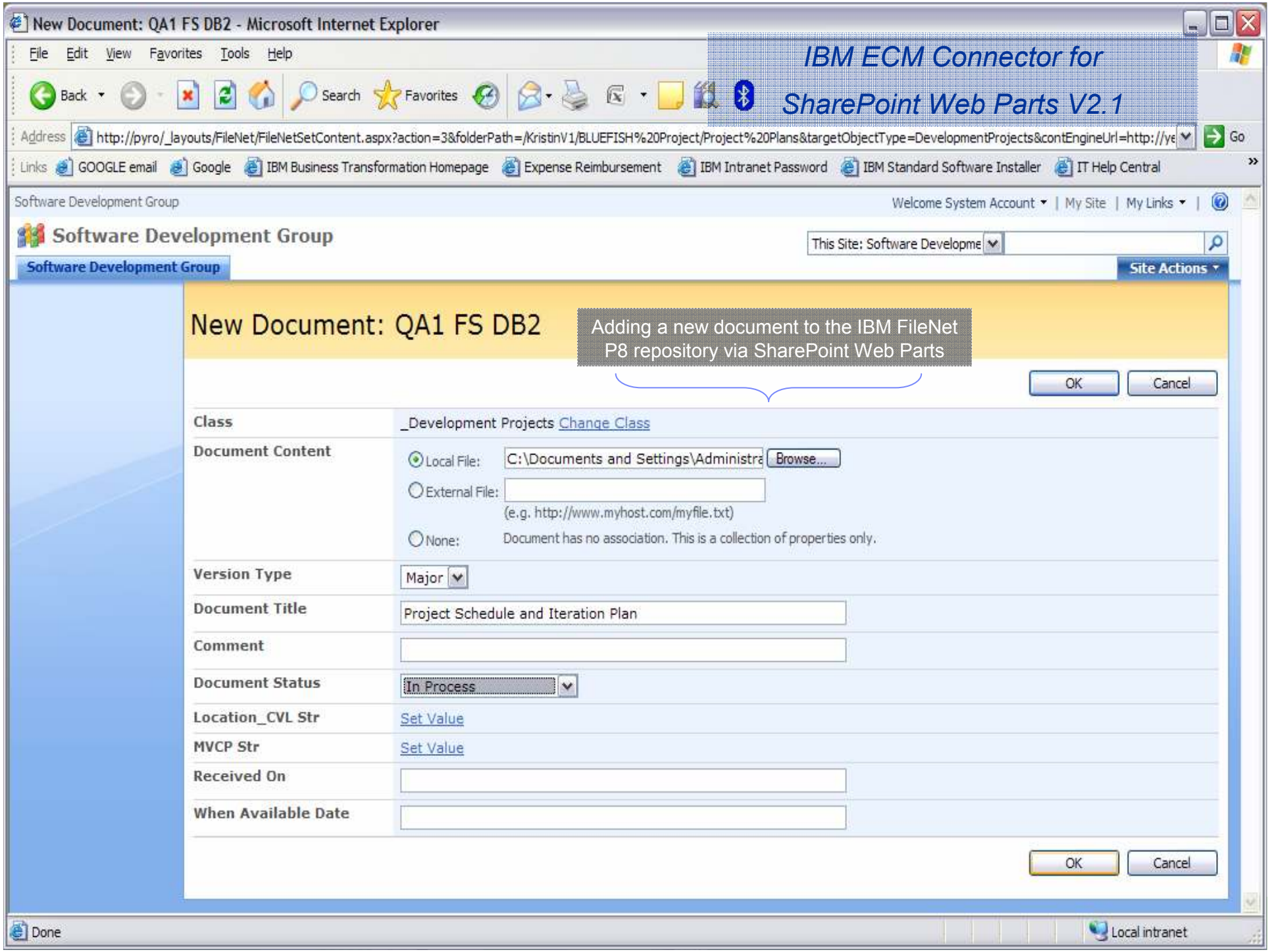
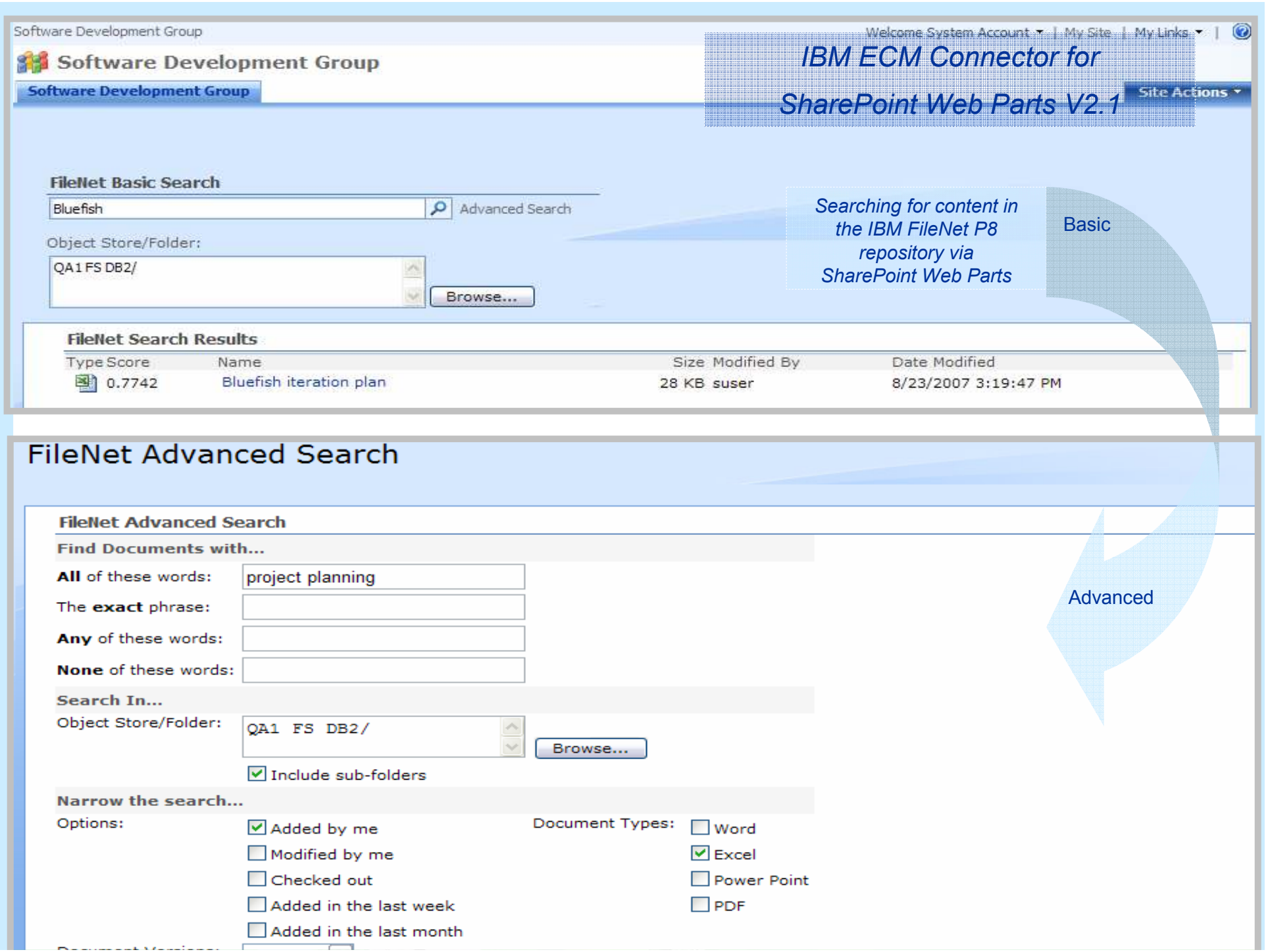

Home - Software Development Group - Microsoft Internet Explorer
File Edit View Favorites Tools Help
IBM ECM Connector for
SharePoint Web Parts V2.1
Back Search Favorites
Address http://pyro/default.aspx
Go
Links GOOGLE email Google IBM Business Transformation Homepage Expense Reimbursement IBM Intranet Password IBM Standard Software Installer IT Help Central
Software Development Group
Welcome System Account | My Site | My Links
Software Development Group
This Site: Software Developme
Site Ac
Software Development Group
View All Site Content
Documents
Shared Documents
Lists
Calendar
Tasks
Discussions
Team Discussion
Sites
People and Groups
Recycle Bin
FileNet Basic Search
Advanced Search
Object Store/Folder:
QA1 FS DB2/
Browse...
IBM FileNet Browse
BLUEFISH Project > Project Plans
New Document
New Folder
Type Name Size Modified By Date Modified
Bluefish iteration plan 28 KB suser 8/23/2007 3:19:47 PM
Bluefish- Globalization plan 28 KB suser 8/23/2007 12:00:16 PM
View Properties
Edit Properties
View Permissions
Check Out
Download a Copy
Delete
Accessing IBM FileNet P8 documents leveraging the full SharePoint user experience, e.g. document “drop down” menus
SharePoint Search
All Sites
Shared Documents
Type Name Modified By
5-Series Checklist for Dealership Stock ! NEW System Account
3-Series Dealership Inventory Tracking ! NEW System Account
Add new document
Announcements
Team T-Shirts Available Now ! NEW 8/23/2007 11:58 AM
by System Account
Cost is $19.99. Send your size and quantity to jsmith@123.com
Welcome to the team... ! NEW 8/23/2007 11:57 AM
by System Account
Jan Doe and John White have joined the Bluefish project team. Jan will be working on user interface design and John will be managing the globalization effort.
Add new announcement
Done
Local intranet

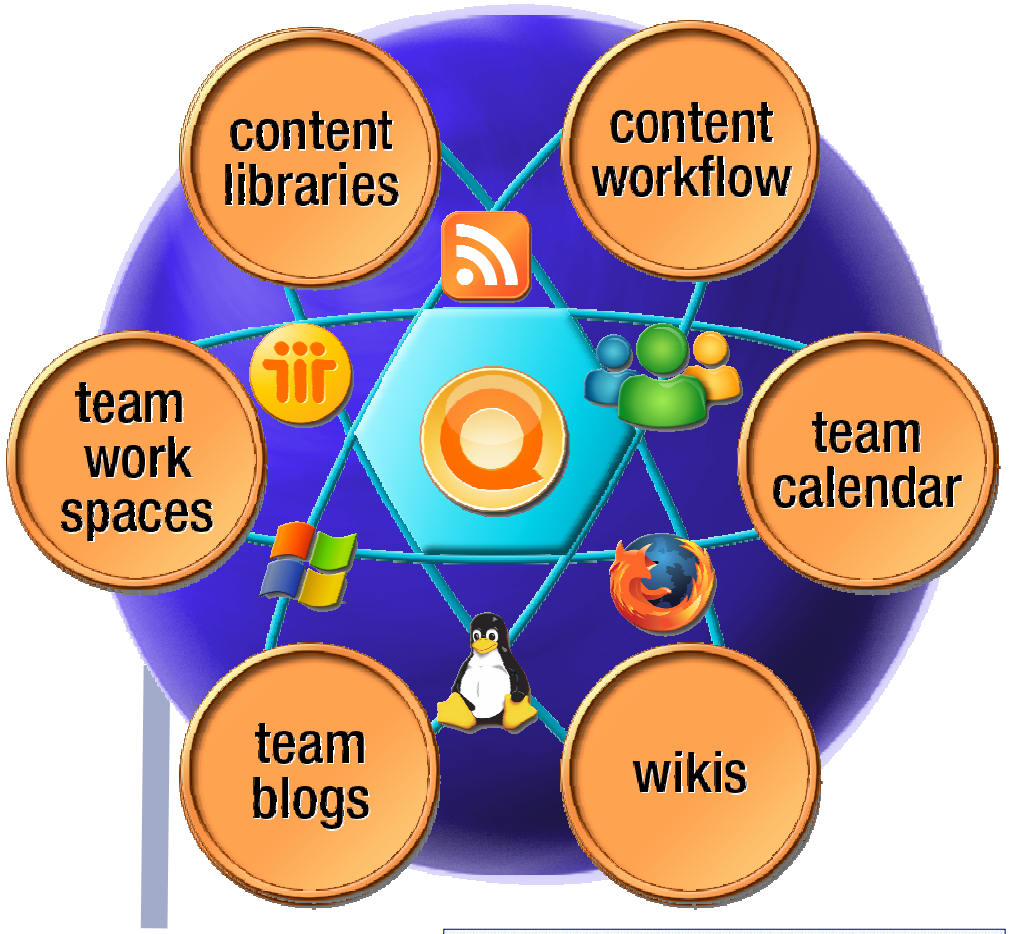

New Document: QA1 FS DB2 - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://pyro/_layouts/FileNet/FileNetSetContent.aspx?action=3&folderPath=/KristinV1/BLUEFISH%20Project/Project%20Plans&targetObjectType=DevelopmentProjects&contEngineUrl=http://ye
Go
Links GOOGLE email Google IBM Business Transformation Homepage Expense Reimbursement IBM Intranet Password IBM Standard Software Installer IT Help Central
IBM ECM Connector for SharePoint Web Parts V2.1
Software Development Group
Welcome System Account | My Site | My Links |
Software Development Group
This Site: Software Developme
Site Actions
Software Development Group
New Document: QA1 FS DB2
Adding a new document to the IBM FileNet P8 repository via SharePoint Web Parts
OK Cancel
Class
_Development Projects Change Class
Document Content
Local File: C:\Documents and Settings\Administra Browse...
External File:
(e.g. http://www.myhost.com/myfile.txt)
None: Document has no association. This is a collection of properties only.
Version Type
Major
Document Title
Project Schedule and Iteration Plan
Comment
Document Status
In Process
Location_CVL Str
Set Value
MVCP Str
Set Value
Received On
When Available Date
OK Cancel
Done
Local intranet


Software Development Group
Welcome System Account | My Site | My Links
Software Development Group
Software Development Group
Site Actions
IBM ECM Connector for
SharePoint Web Parts V2.1
FileNet Basic Search
Bluefish
Advanced Search
Object Store/Folder:
QA1 FS DB2/
Browse...
Searching for content in the IBM FileNet P8 repository via SharePoint Web Parts
Basic
FileNet Search Results
Type Score
Name
Size
Modified By
Date Modified
0.7742
Bluefish iteration plan
28 KB
suser
8/23/2007 3:19:47 PM
FileNet Advanced Search
FileNet Advanced Search
Find Documents with...
All of these words:
project planning
The exact phrase:
Any of these words:
None of these words:
Search In...
Object Store/Folder:
QA1 FS DB2/
Browse...
Include sub-folders
Narrow the search...
Options:
Added by me
Modified by me
Checked out
Added in the last week
Added in the last month
Document Types:
Word
Excel
Power Point
PDF
Advanced

Lotus Quickr

Benefits

- Collaborate from within your desktop applications with the client connectors
- Team working integration with P8 and CM8
- Move content from Lotus Quickr to ECM to leverage Records Management, Business Process Management, centralized storage
- Single access point and experience for all content—Lotus Quickr and ECMListView
- Incorporate ECM content into Lotus Quickr applications
- IBM's Content Manager or FileNet, provides the most complete single-vendor end-to-end content management solution in the industry



Included Content Stores

Lotus Domino

IBM JCR

Integration & Coexistence

IBM FileNet*

IBM CM*

Other*

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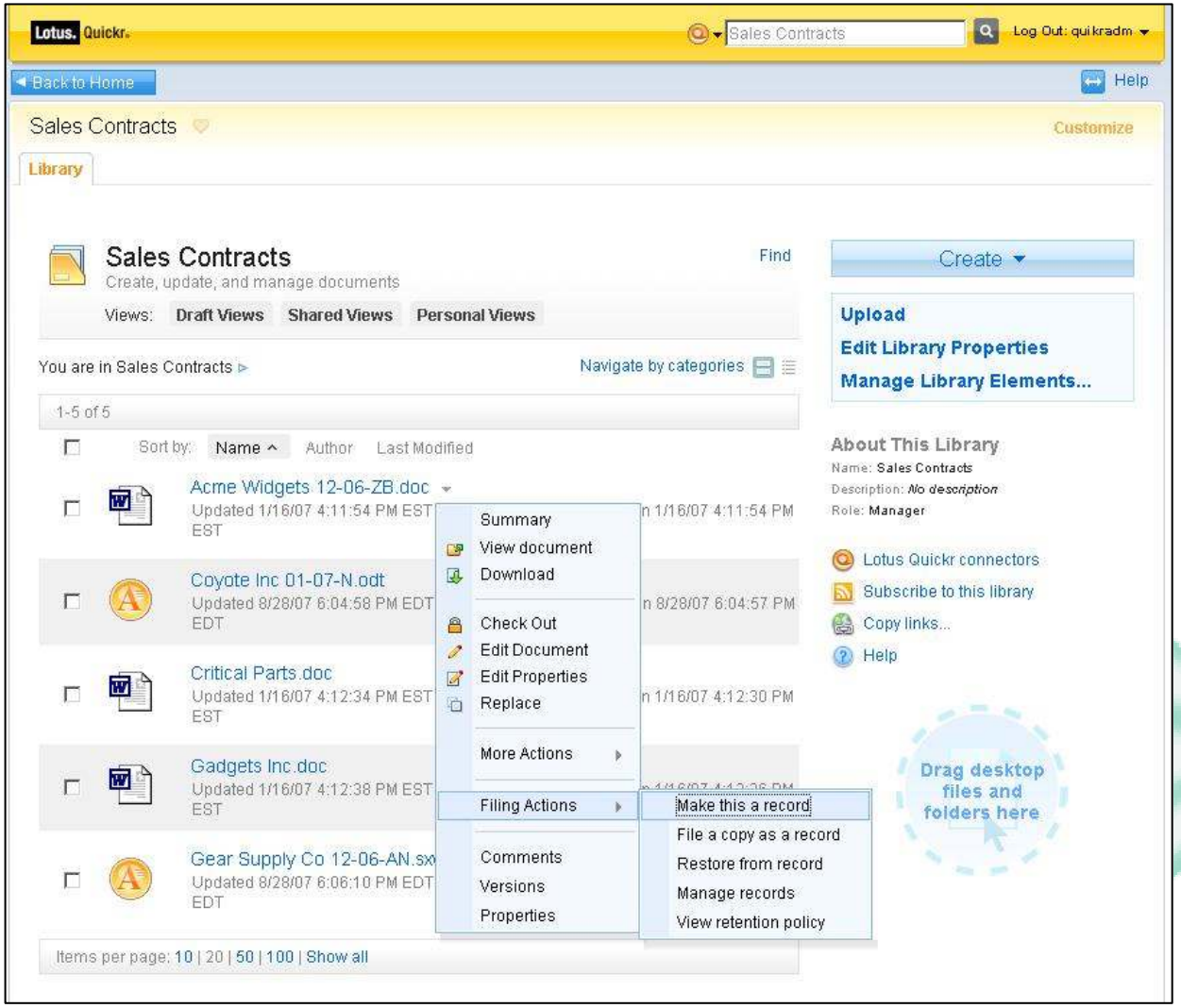
IBM Quickr Connector for IBM ECM



Benefits

- Create Records from within Quickr
- Reduce storage costs
- BPM enable content
- ILM for collaborative work
- One Vendor

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SAP Knowledge Manager (KM)

About SAP Netweaver Portal:

- Unifies critical information and applications to give users role-based views that span the enterprise, enabling you to take full advantage of your information resources.
- LOB Applications for ERP

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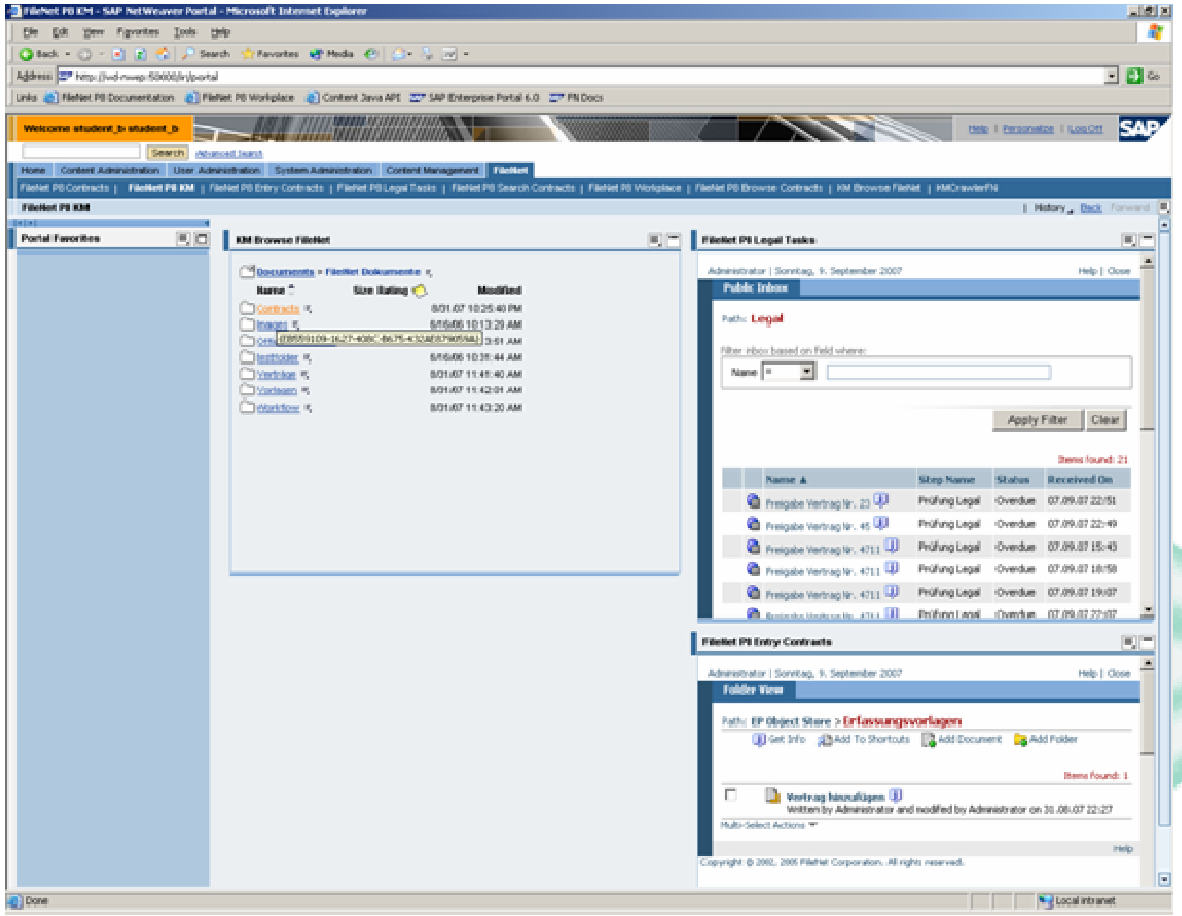
IBM ECM Connector for SAP KM



Benefits

- Integrates IBM ECM content into the unified mySAP Enterprise Portal, providing full access to valuable information from
- SAP Portal users now can access and view all the documents and meta-data in P8 Content Manager from within the SAP Portal as easily as accessing documents in the SAP database.
- Provides a unified view of all enterprise content, thus improving operational efficiency, increasing user productivity, and increasing customer satisfaction.

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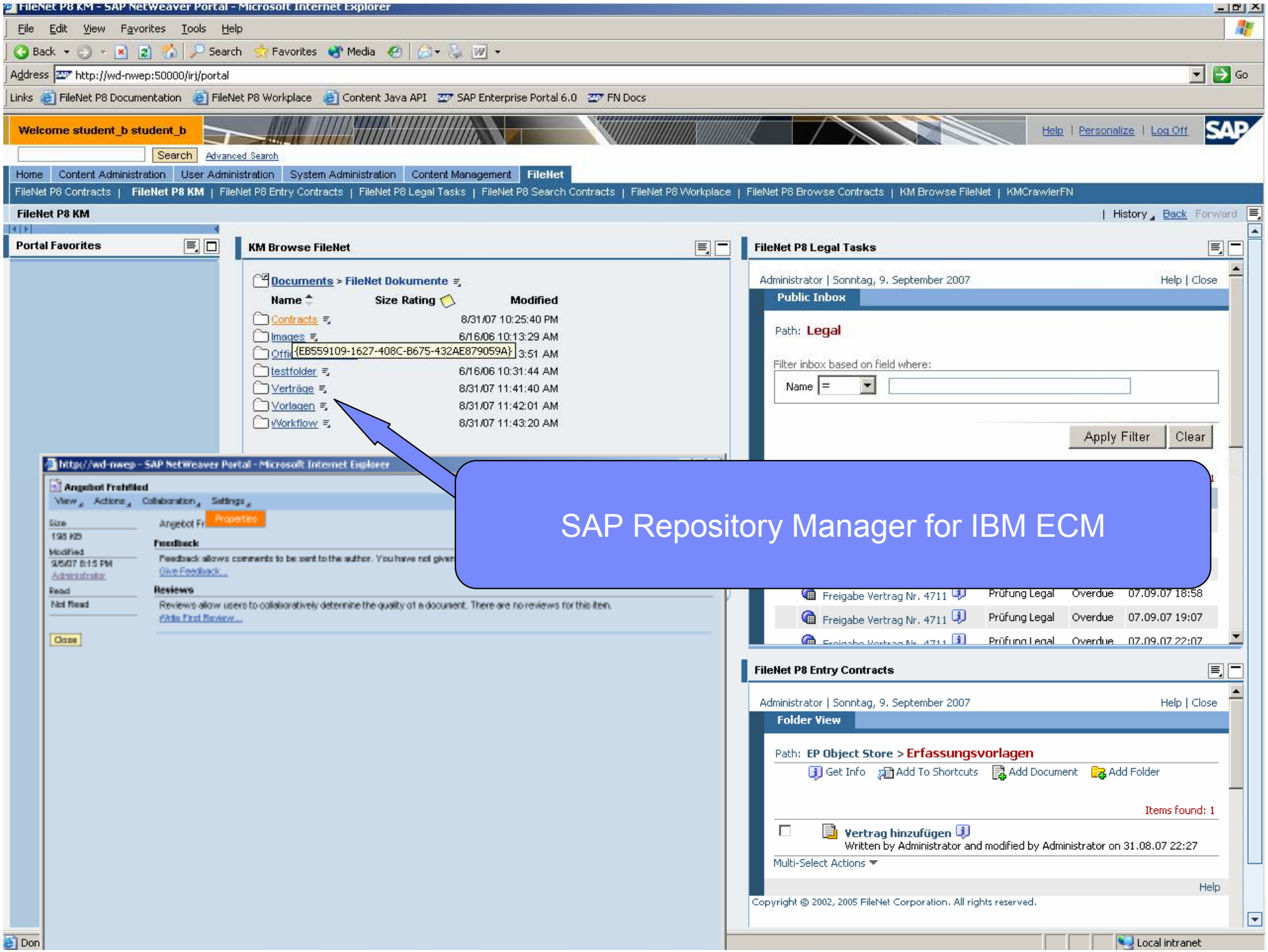
FileNet P8 KM - SAP NetWeaver Portal - Microsoft Internet Explorer
Welcome student_b student_b
Help | Personalize | Log Off
Search
Advanced Search
Home
Content Administration
User Administration
System Administration
Content Management
FileNet
FileNet P8 Contracts | FileNet P8 KM | FileNet P8 Entry Contracts | FileNet P8 Legal Tasks | FileNet P8 Search Contracts | FileNet P8 Workplace | FileNet P8 Browse Contracts | KM Browse FileNet | KMCrawlerFN
FileNet P8 KM
Portal Favorites
KM Browse FileNet
Documents > FileNet Dokumente
Name
Size Rating
Modified
Contracts 8/31/07 10:25:40 PM
Images 6/16/06 10:13:29 AM
{EB559109-1627-408C-B675-432AE879059A} 3:51 AM
testfolder 6/16/06 10:31:44 AM
Verträge 8/31/07 11:41:40 AM
Vorlagen 8/31/07 11:42:01 AM
Workflow 8/31/07 11:43:20 AM
FileNet P8 Legal Tasks
Administrator | Sonntag, 9. September 2007
Help | Close
Public Inbox
Path: Legal
Filter inbox based on field where:
Name =
Apply Filter
Clear
Freigabe Vertrag Nr. 4711 Prüfung Legal Overdue 07.09.07 18:58
Freigabe Vertrag Nr. 4711 Prüfung Legal Overdue 07.09.07 19:07
Prüfung Legal Overdue 07.09.07 22:07
FileNet P8 Entry Contracts
Administrator | Sonntag, 9. September 2007
Help | Close
Folder View
Path: EP Object Store > Erfassungsvorlagen
Get Info
Add To Shortcuts
Add Document
Add Folder
Items found: 1
Vertrag hinzufügen
Written by Administrator and modified by Administrator on 31.08.07 22:27
Multi-Select Actions
Help
Copyright © 2002, 2005 FileNet Corporation. All rights reserved.
Local intranet
SAP Repository Manager for IBM ECM

Agenda

- ECM Applications
- Desktop
- Basic Content Services
- **Persuasive Content**
- Search

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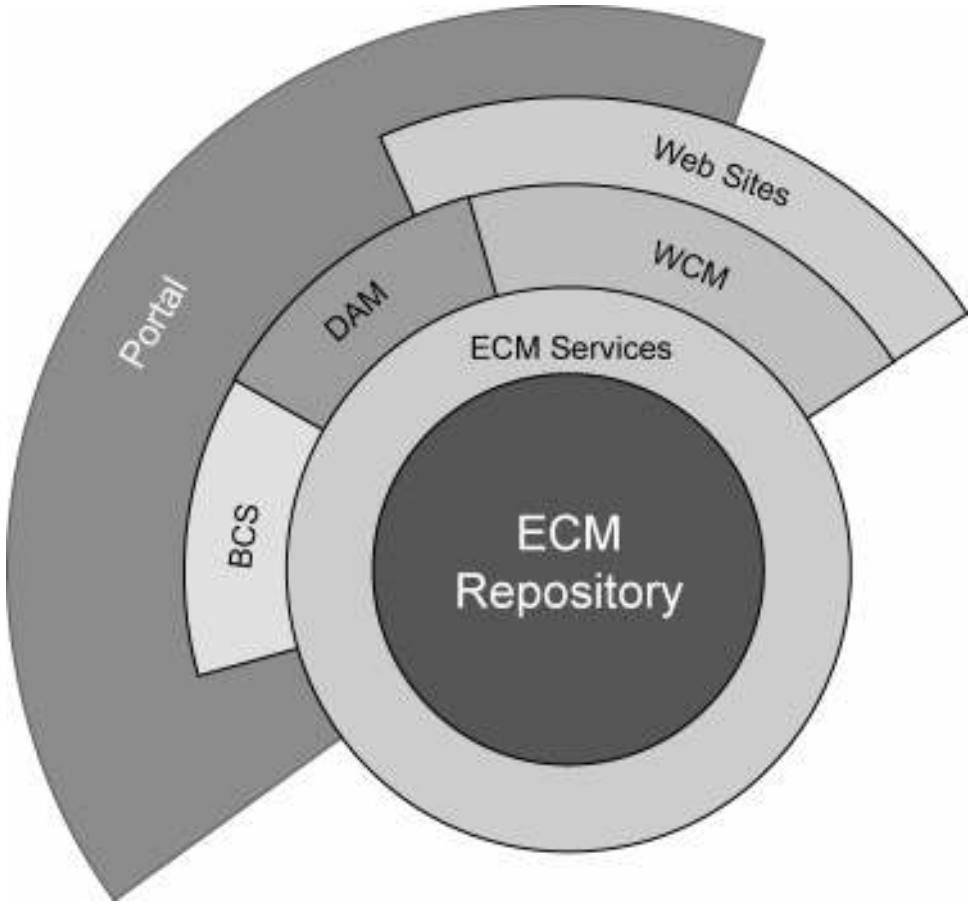
Integrated Offering for ECM and Persuasive CM



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IBM Workplace Web Content Management

- **Persuasive**
  Advanced, **rules-based personalization** capabilities allow persuasive, targeted information to be dynamically delivered to your employees, customers, suppliers and partners via the WebSphere Portal environment
- **Enable business users**
  Enhanced authoring and administration capabilities allow web content to be created and delivered more effectively via your WebSphere Portal environment
- **IT consolidation**
  IBM leads the industry with the most **tightly integrated portal and Web content management** solution on the market today paired with integration into IBM ECM platform

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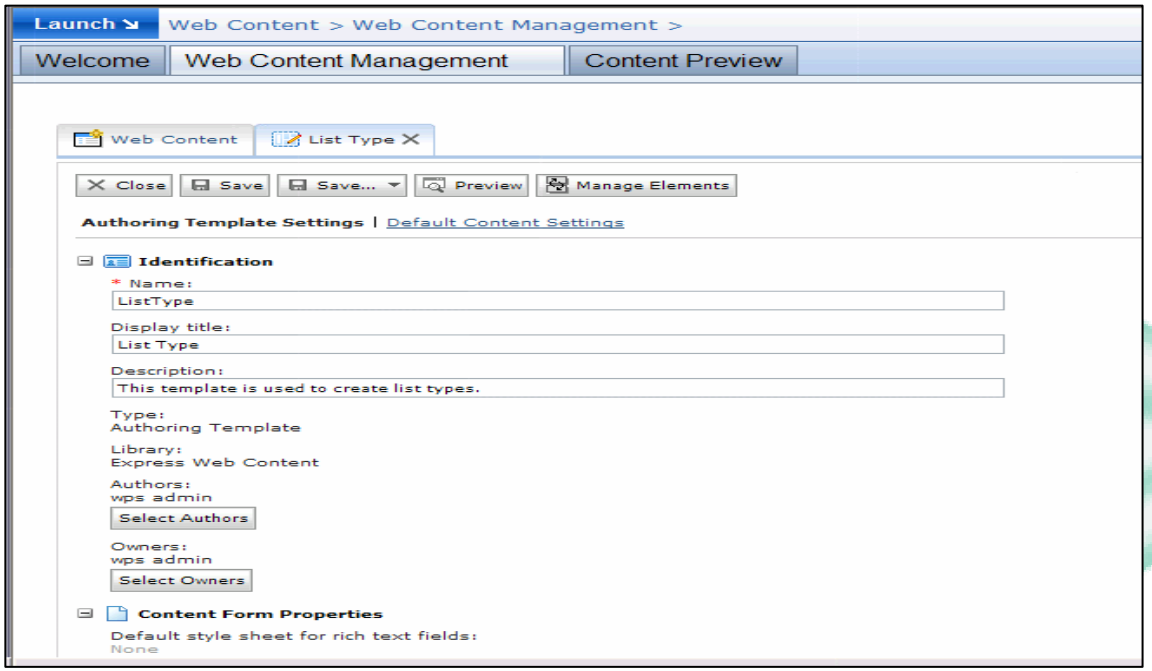
IBM Workplace WCM



Benefits

- Portal and Content "Hand In Hand"
- Integration with WebSphere Portal helps lower project costs and
- Jointly developed and tightly integrates with WebSphere Portal
- Integration with FileNet P8 4.x planned

Version:6.0

CM8 Connector: Available

Next release: 6.1

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IBM FileNet Web Site Manager

- **Persuasive**
  Dynamic publishing model leverages application server infrastructure to drive personalized content to individual users
- **Enable business users**
  Best of breed in-site editing user interface and fully browser based tools enable every noon-technical user to create web content
- **IT consolidation**
  IBM FileNet Web Site Manager **integrates** with FileNet P8 3.5 to effectively leverage the convergence of ECM and WCM

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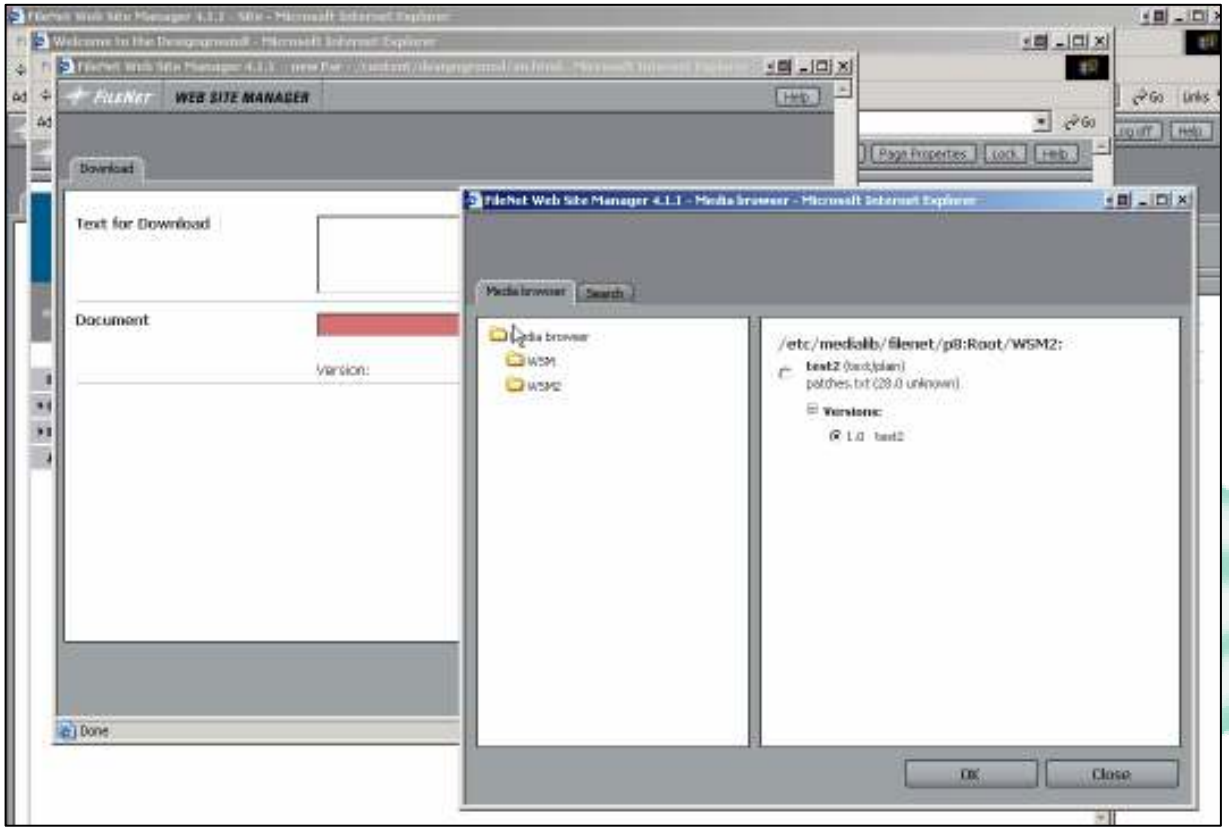
IBM FileNet Web Site Manager



Benefits

- Persuasive – Dynamic publishing model leverages application server infrastructure
- Best of Breed In-Site editing
- Integration with IBM FileNet P8 3.5.x

Version: 4.1.1

P8 Connector: Level 1 -3.5

CM8 Connector: not planned

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WCM Releases

- **Workplace WCM**
  - Current version: 6.0
  - Released 2006
  - Provides integration with CMv8
  - Planned integration IBM FileNet P8 4.0 (6.1) / Q3/2008
- **Web Site Manager**
  - Current version: 4.1
  - Released 12-06
  - Provides integration with FileNet P8 3.5

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Agenda

- ECM Applications
- Desktop
- Basic Content Services
- Persuasive Content
- **Search**

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It is not just Keyword

Finding

- Context awareness
- Security
- Semantics

Use Cases

- Intra/Internet
- Applications
- UI Centric

OmniFind Analytics

Analyzing

- Aggregation
- Textual Intelligence

Use Cases

- Competitve Intelligence
- Risk Analyzes
- Knowledge Worker Apps

OmniFind Enterprise

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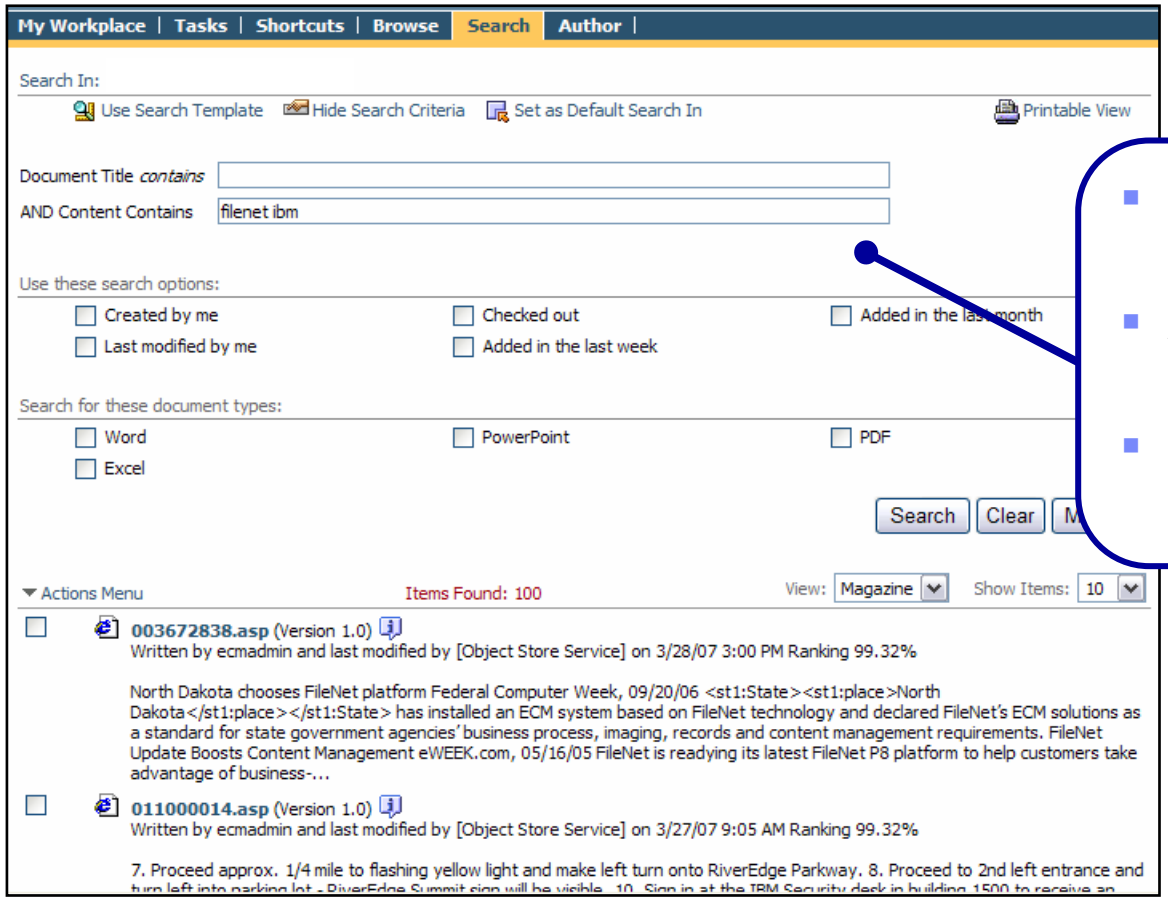
Basic Search (Level 0)

L0: Basic Search	▪ Ad-hoc access to content



- Comes with the repository
- A starting point for leveraging content
- But insufficient to deliver actionable insight

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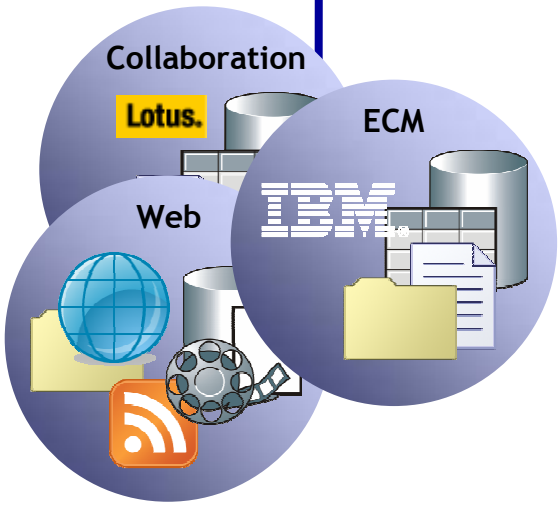
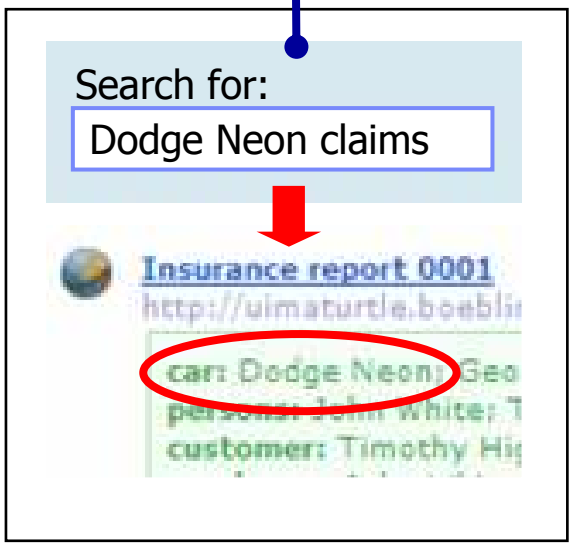
Value-add with Advanced Search (Level 1)

L1: Semantic Search	▪ Taking a broad view of content, across and beyond the enterprise ▪ Finding content through concepts, not keywords

Integrated access to unmanaged content and Web data



Concept search to find relevant content quickly & accurately



Rich UIs and Web 2.0 techniques to improve findability

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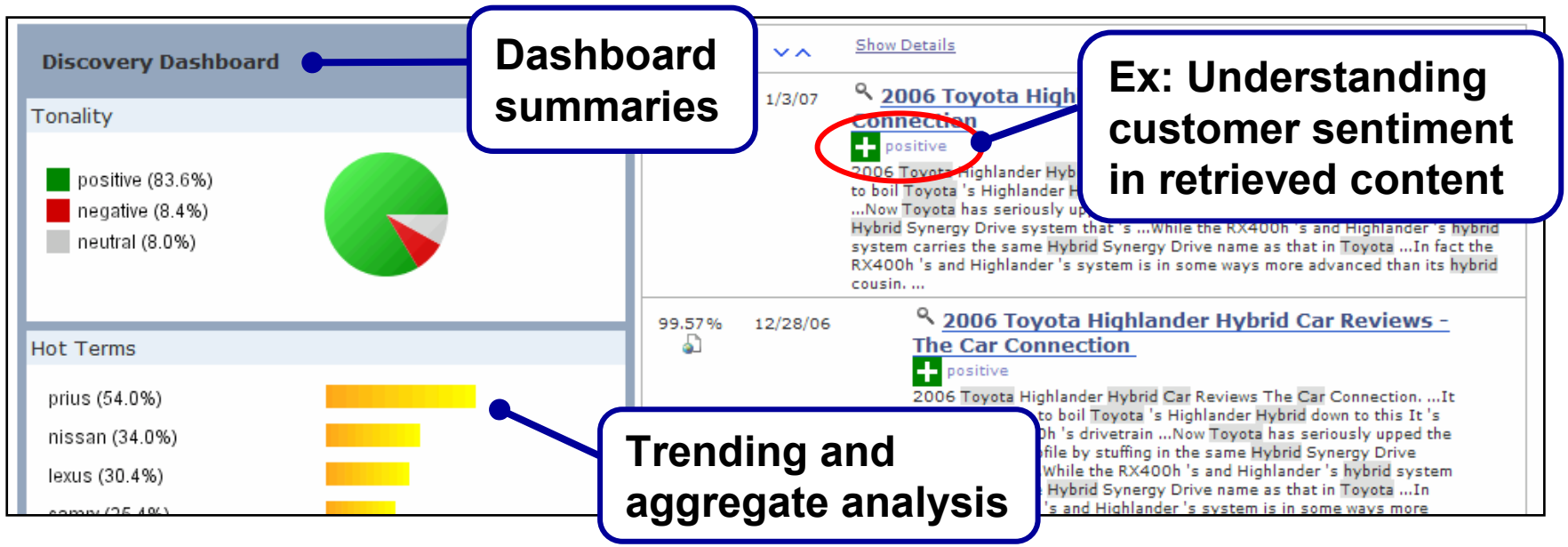
Beyond Search with Content Understanding (Level 2)

L2: Content Understanding	▪ Automatically extracting meaning from content

- Search (L0 and L1) only helps find content, leaving the understanding and analysis to the user
- The next level is to automate the understanding of content by applying content analytics more deeply



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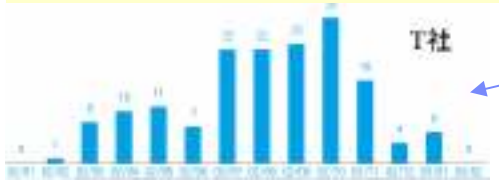
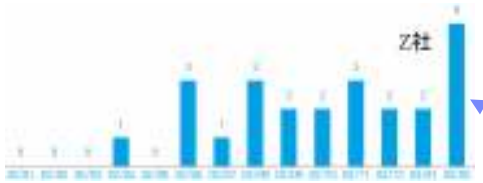
The Ultimate Goal: Actionable Insight (Level 3)

L3: Actionable Insight	▪ Understanding content in the aggregate: mining for patterns ▪ Incorporating and leveraging structured data

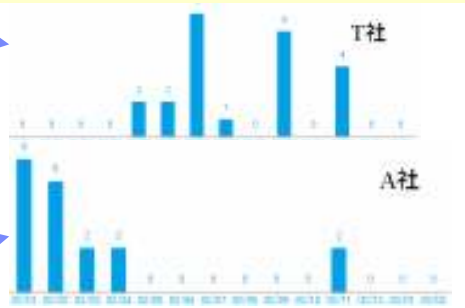
High performance agents with continuous contact pattern have moderate skill levels.





Rank	Agent Name	Frequency (Relative)	Rank	Agent Name	Frequency (Relative)
1	AAA	146(2.66)	19	RRR	38(0.0)
2	M:ABC	130(2.31)	20	SSS	37(0.0)
3	M:BBB	220(2.11)	21	TTT	56(0.0)
4	M:CCC	120(2.0)	22	UUU	54(0.0)
5	M:DDD	118(1.85)	23	VVV	34(0.0)
6	M:EEE	148(1.84)	24	WWW	30(0.0)
7	FFF	76(1.81)	25	XXX	51(0.0)
8	GGG	80(1.56)	26	YYY	19(0.0)
9	M:HHH	89(1.49)	27	M:ZZZ	47(0.0)
		18(1.49)	28	M:aaa	12(0.0)
		35(1.44)	29	M:bbb	11(0.0)
	KKK	100(1.44)	30	ccc	10(0.0)
	LLL	60(1.17)	31	ddd	9(0.0)
	MMM	65(1.13)	32	eee	8(0.0)

Low performance agents do not have high-skill nor continuous contact patterns.



High performance agents with concentrated contact pattern have high skill level.

Ex: Mining of Structured + Unstructured Reveals Keys to Agent Performance

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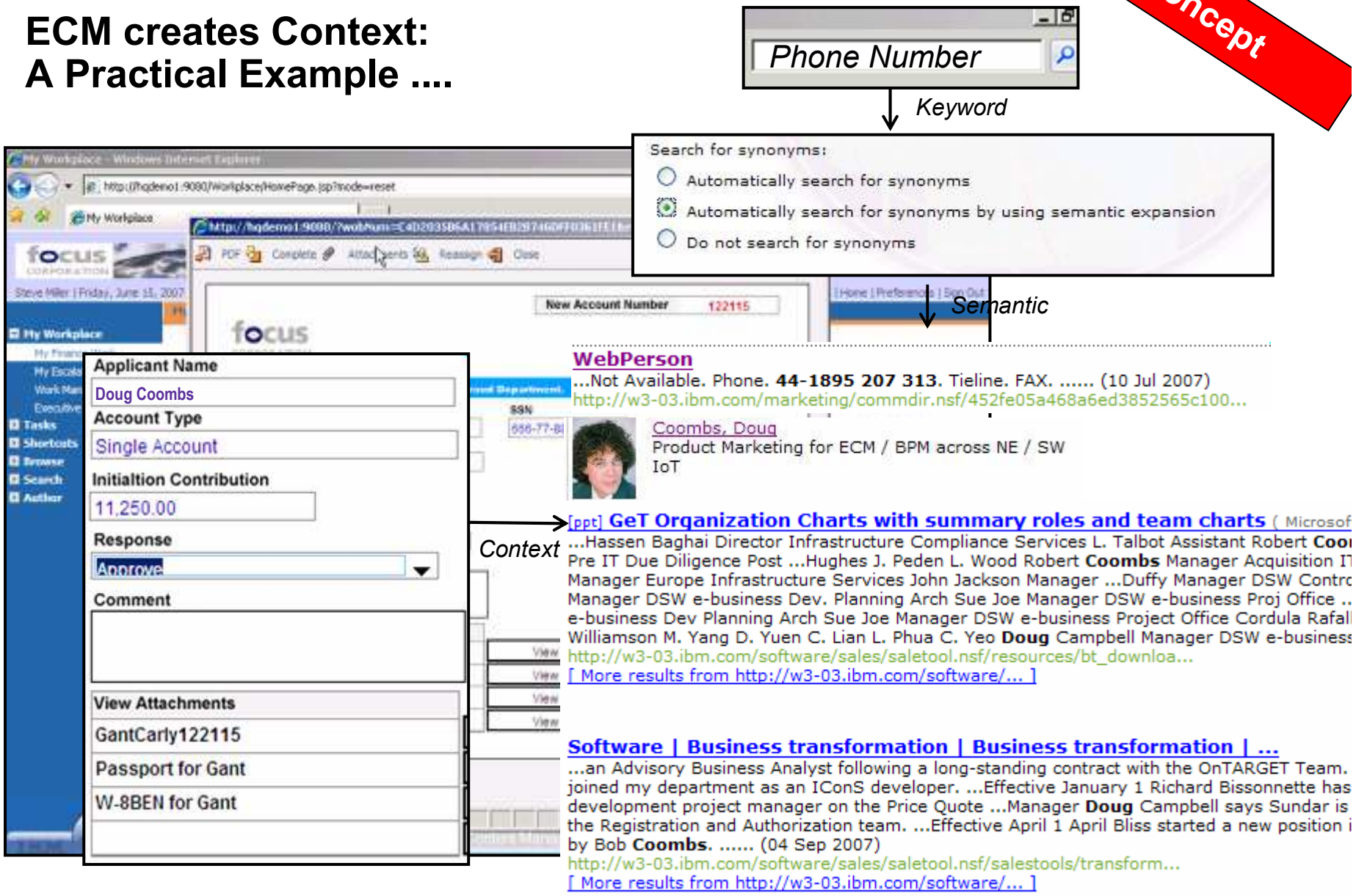
Concept

ECM creates Context: A Practical Example ....



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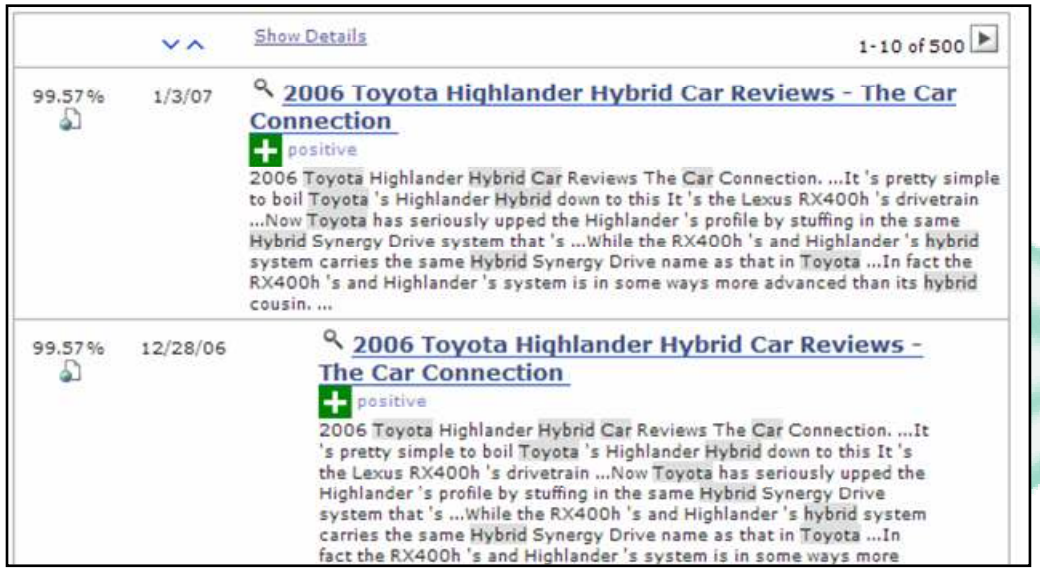
OmniFind: Enterprise Edition



Benefits

- Semantic Search
- Secured Search
- Multiple Repositories
- Open Standard Based
- Context Enabled search

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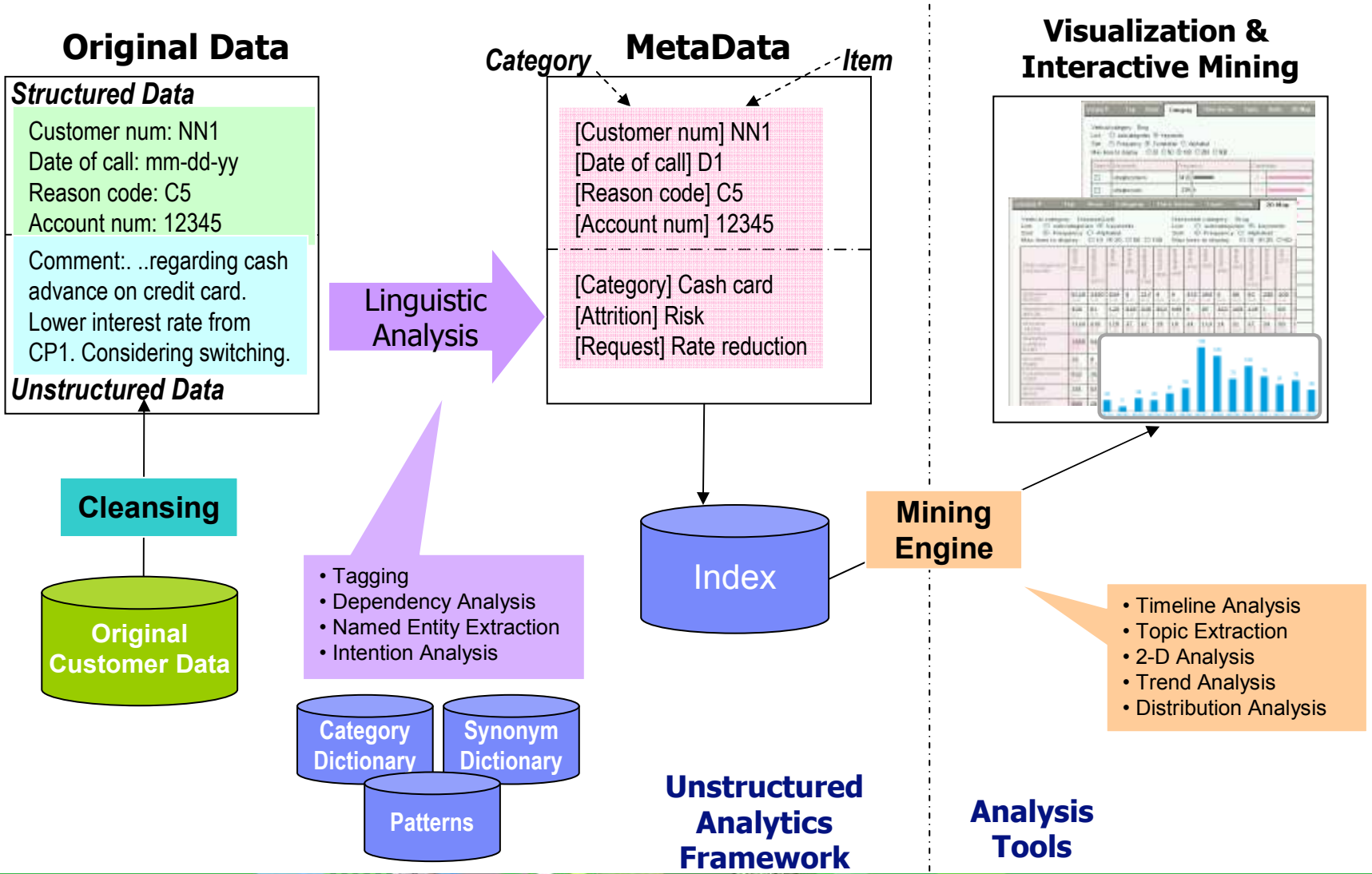
IBM OmniFind Analytics Edition - Overview



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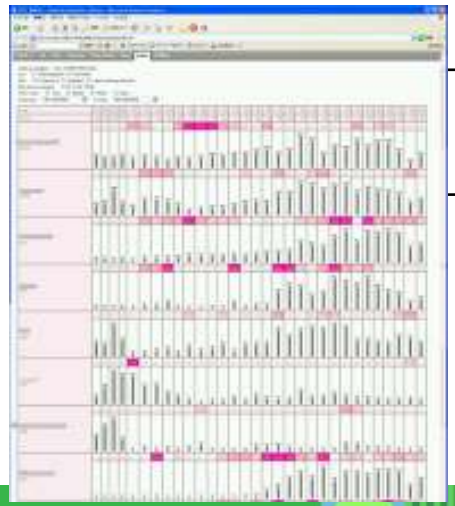
Example Analysis Scenario Using OmniFind Analytics

Find all customer contacts regarding cash advances on credit cards

Find the contacts where the customer complains about the service (“high rate”, “overcharge” etc).

Correlate information about account status against these complaints



- Identify higher correlation between customer complaints about cash advance rate and inactive accounts

As a result of the analysis:

- Develop new rate structure and offer to premium account holders
- Resulting in reduced churn from this segment

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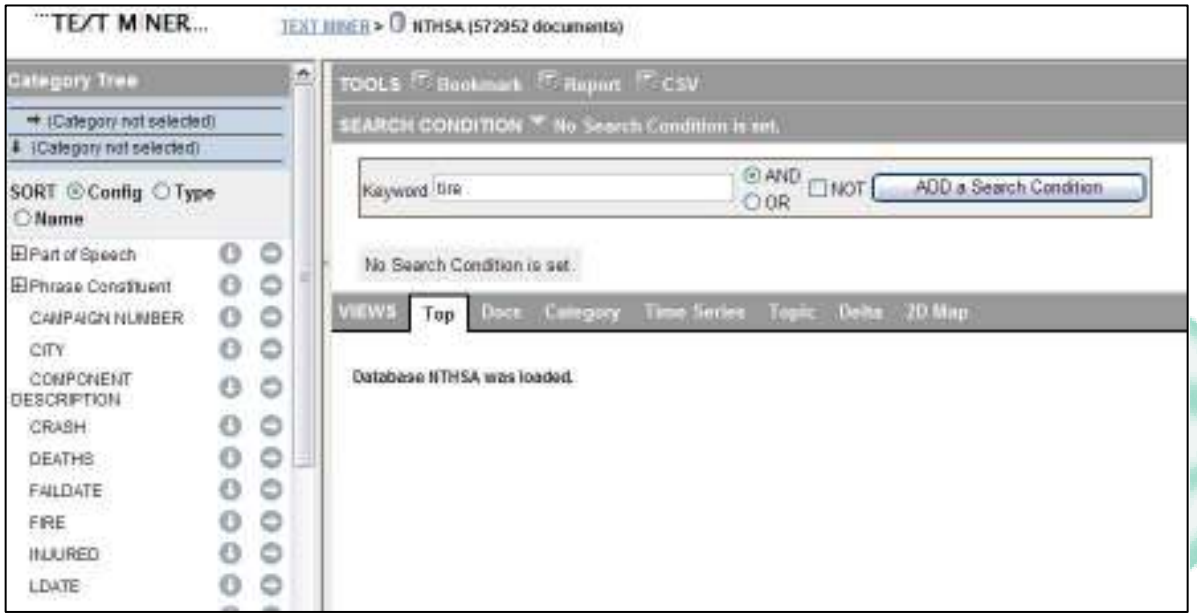
OmniFind: Analytics Edition



Analysis

- Customer communications to provide insight into customer satisfaction issues
- provide early warning of quality issues
- provide market or customer intelligence
- legal discovery and compliance capabilities
- Normalization of medical or life sciences information

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IBM ECM
Content Technologies

Summary

Information Management software

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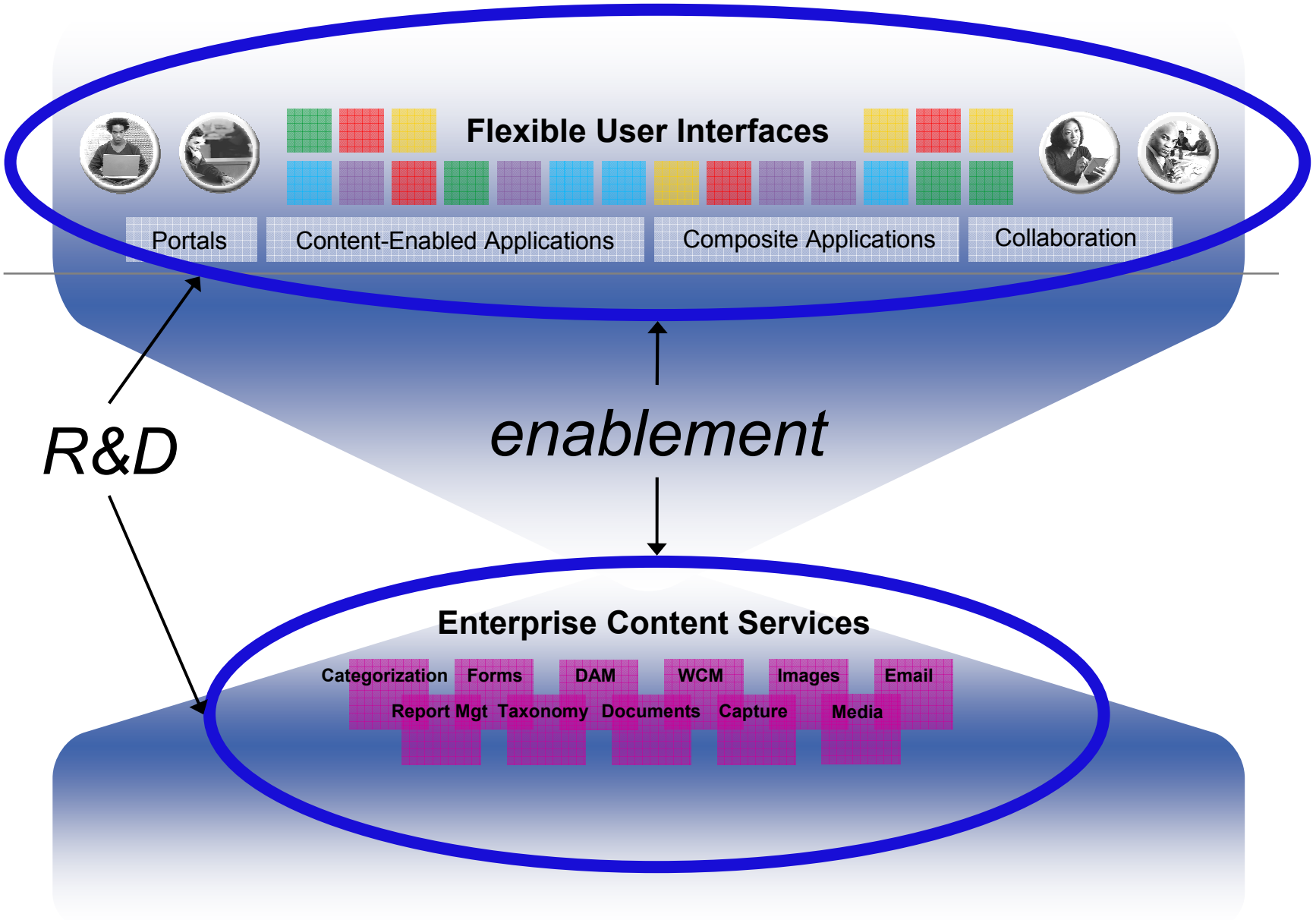

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Content is a commodity...

...managing it on an enterprise level is an art...

User access is critical

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Introduction	**ECM as part of Information On Demand** **ECM Maturity and Adoption** **Current Portfolio position** **Roadmap** **Vision for ECM**	**Doug Coombs**	**30**
Content	**The Changing Market for Content Management** **The Role of ECM in Collaboration** **ECM user interface for the desktop and the web** **Advanced Search and Analytics**	**Thorsten Zoerner**	**60**
Process	**Activating Content and Business Process Management** **The Roadmap for Content Centric Process Tools including product demonstrations** **IBM Business Process Management Strategy** **What's next for Process?**	**Daniel Crow**	**60**
Compliance	**Control and Enforcement** **Product positioning, roadmap and demonstrations for records and email** **Classification for ECM** **What are eDiscovery and the ECM framework for compliance?**	**Graham Hadingham**	**60**
Platform	**The Repository Roadmap and Federation** **Next Steps for Infrastructure** **Software as a Service** **Portfolio and Vision Re-Visited**	**Doug Coombs**	**30**

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