# Agile ECM:

Enabling Business Innovation
with IBM ECM Solutions

**Information Management** software

# Global market forces are impacting everyone

**Excess of Information**
- *Single source of truth*
- *Insight*
- *Just-in-time content*

**Volatile Energy Costs**
- *Operational efficiency*
- *Paperless drives value*

**Access to Capital & Credit Crunch**
- *Consolidation*
- *Operational efficiency*
- *Agility*

**Emerging Markets Global Competition**
- *Leapfrog technology*
- *In "the cloud"*
- *Operational flexibility*

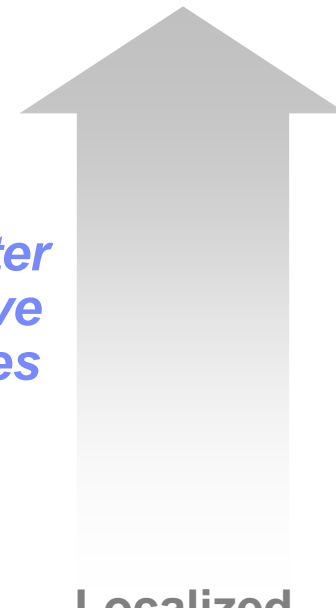**New Customer Demands**
- *Speed and agility*
- *Customization*

# Organizations want agility for better outcomes

**Optimized and Dynamic**

**Globalized processes**

*Gain Greater Competitive Advantages*

**CIO's top priority** over last three years: *"Improving Business Processes"*

**Automated and Visible**

**Localized processes**

Source: Gartner, "Making the Difference: The 2008 CIO Agenda," Jan. 2008

# Bridging the gap between Business and IT

| BUSINESS | | IT |
|---|---|---|

**Business can rapidly change business model**

- Real-time access to key content, business and compliance performance metrics

- Change information sources, processes and roles whenever the business requires

Alignment

Visibility

Govern

Change

**IT remains in control of efficient infrastructure**

- Modularity enables the business to change without changing the infrastructure

- Establish rules for authorization of changes and execute modifications swiftly

# Agility delivers strong financial returns

- Integrated IT and Business result in **DOUBLE** the productivity gains of isolated business and IT efforts:

  – Outperforming IT Investment alone: 3%

  – Outperforming Business Investment alone: 8%

  – Integrated Business and IT: 20%



*Source: London School of Economics – McKinsey survey and analysis of 100 companies in France, Germany, UK and US*

# Defining IBM's 'Agile ECM'

## Traditional ECM

- Information locked in siloed repository-specific applications
- Unfriendly / difficult / proprietary user experiences
- Many specialized ECM products, little/no integration between them
- ECM investments and solutions limited to the scope of content management
- Lengthy development and deployment cycles

## Agile ECM

- Standards-based repositories and services that span multiple application and content types
- Familiar, easy-to-use, attractive experiences for any business user
- Broad but open platform for rapid deployment of shared services
- ECM is tightly coupled with many other IT services to extend the value of content
- Business value identified in days, production apps deployed in weeks

# IBM Agile ECM:
## *Get <u>More</u> Value Out of Your Content*

IBM Agile ECM helps companies make *better decisions faster* by:
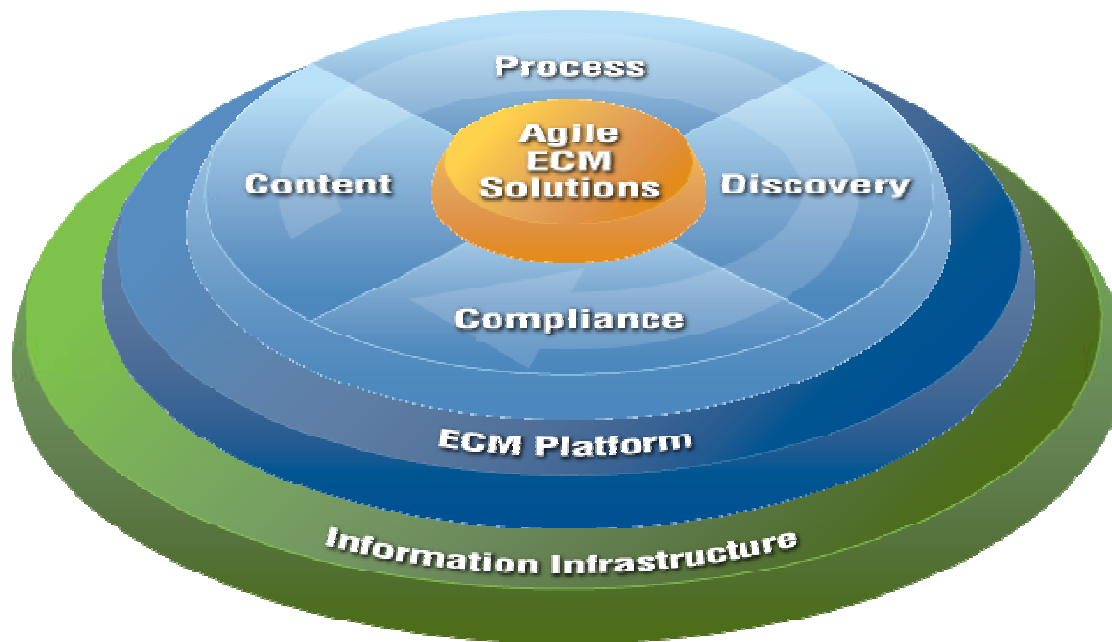


- Managing all forms of content

- Optimizing associated business processes

- Enabling compliance

- Deriving insight from content

through an integrated information infrastructure

# IBM ECM
*Product Strategy & Vision Guiding Principles*

**1**

### Active Content
Deliver information that is unified, accurate and in context with critical business processes and policy management.

**2**

### Business Agility
Provide the right information to the right constituents at the right time in the right context to enable better decisions faster.

**3**

### Enterprise Compliance
Manage risk and automate compliance with records management, legal discovery and content collection and archiving.
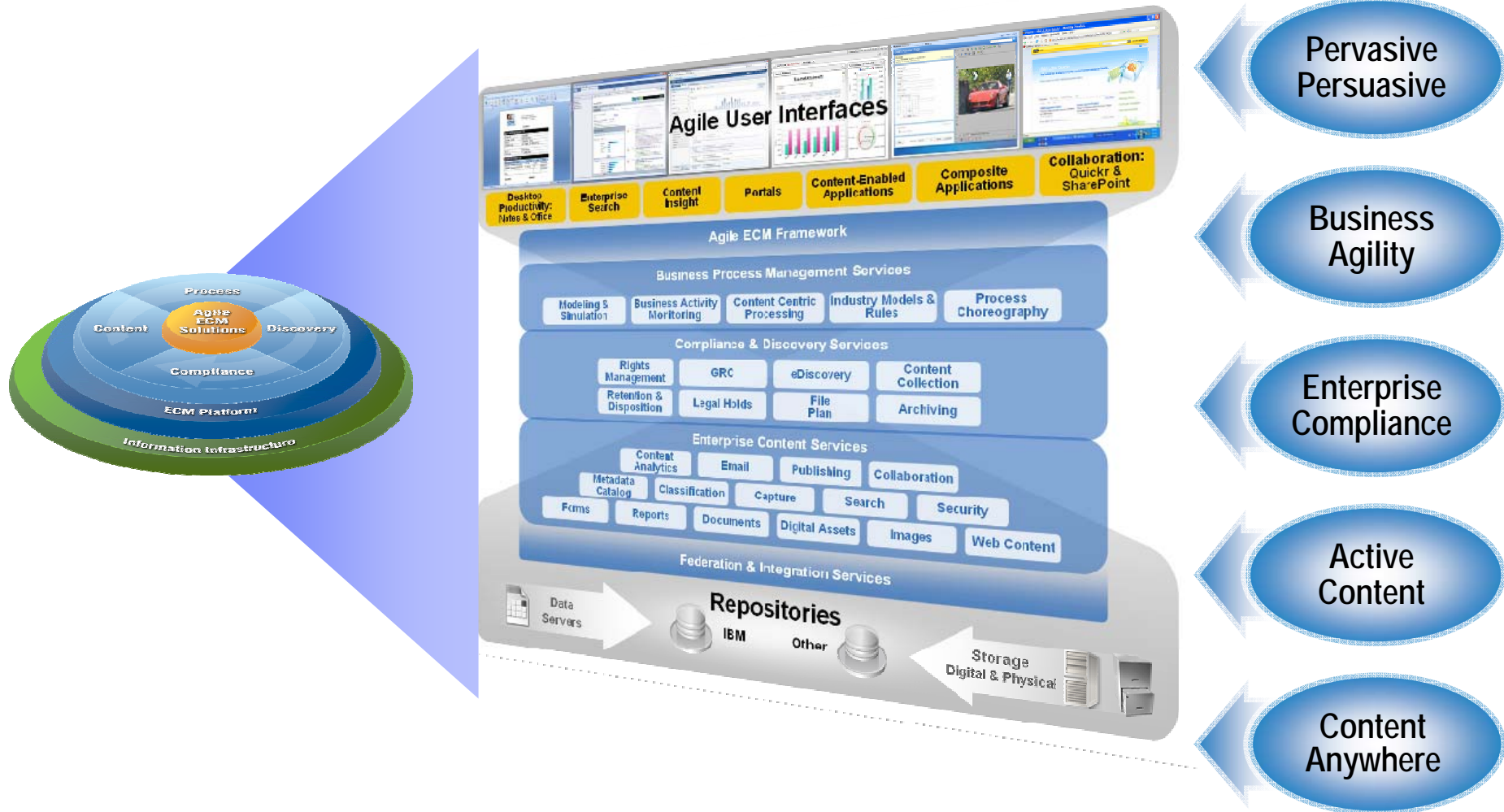
**4**

### Content Anywhere
Manage content anywhere without requiring content migration.
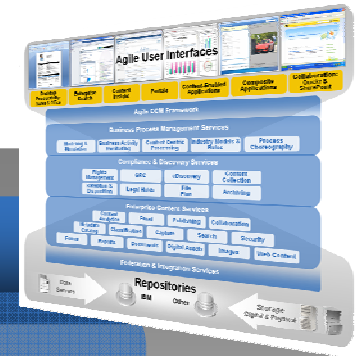
**5**

### Pervasive and Persuasive
Access, collaborate, and influence business decisions in new ways, making content a first-class source of decision-making insight

# IBM Agile ECM Platform

# Integrated Enterprise Platform

## Agile ECM Framework

### Business Process Management Services

| Modeling & Simulation | Business Activity Monitoring | Content Centric Processing | Industry Models & Rules | Process Choreography |

### Compliance & Discovery Services

| Rights Management | GRC | eDiscovery | Content Collection |

| Retention & Disposition | Legal Holds | File Plan | Archiving |

### Enterprise Content Services

| Content Analytics | Email | Publishing | Collaboration |

| Metadata Catalog | Classification | Capture | Search | Security |

| Forms | Reports | Documents | Digital Assets | Images | Web Content |

### Federation & Integration Services

**Business Agility**

**Enterprise Compliance**

**Active Content**

# Scalable Enterprise Repositories



**Content Anywhere**
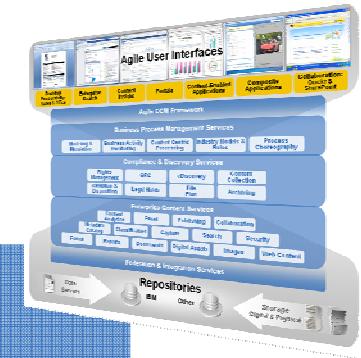
## IBM Content Manager
Robust stand-alone content repository
Supports enterprise-class content applications

## IBM Content Manager On Demand
Enterprise report management (COLD)
Ultra-scalable check image and document storage

## IBM FileNet Content Manager
Robust enterprise content platform
Integrated application and process engines

## IBM FileNet Image Services
Enterprise image management
High volume, scalable image storage and retrieval

## Other Repositories
● SharePoint   ● Documentum   ● OpenText   ● Etc…

# Agile User Interfaces

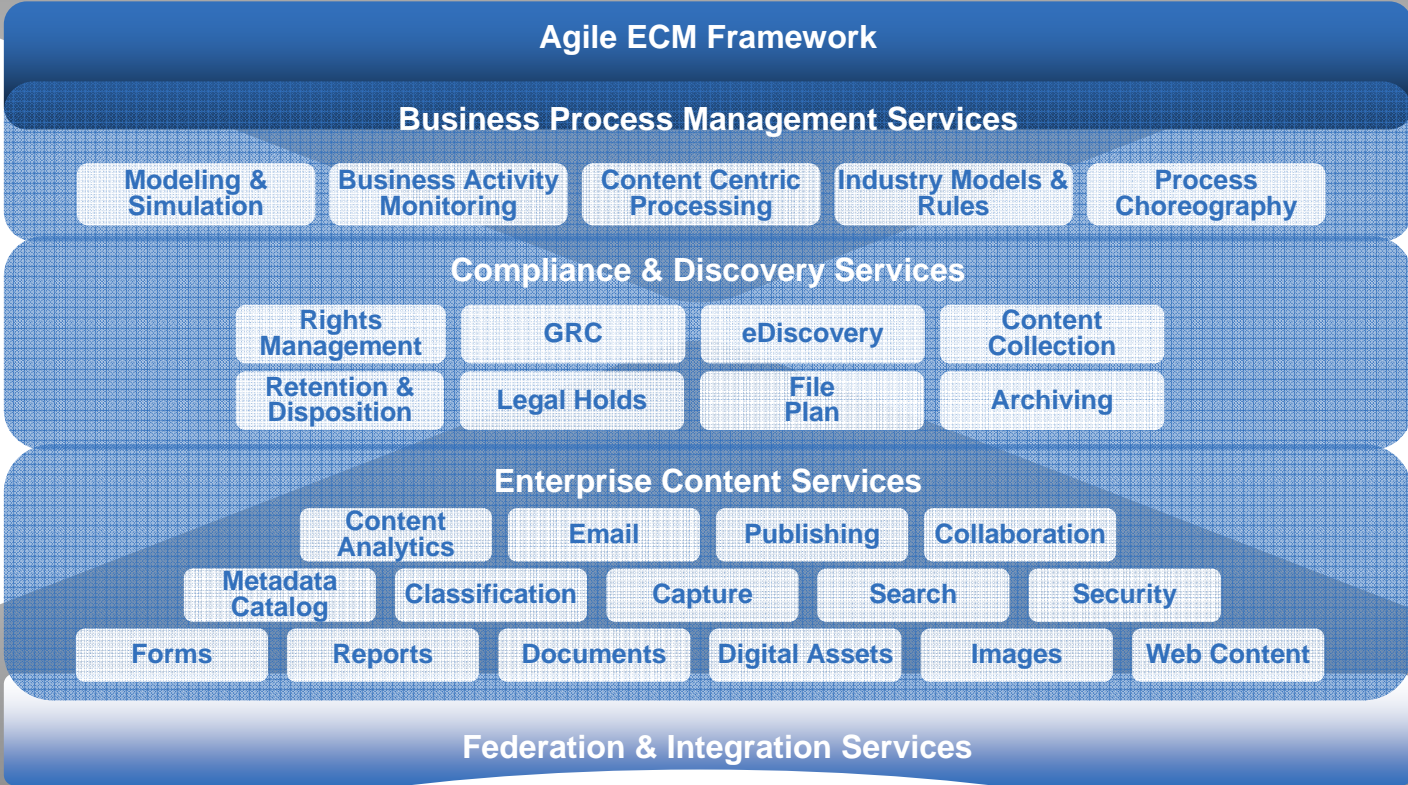| Desktop Productivity: Notes & Office | Enterprise Search | Content Insight | Portals | Content-Enabled Applications | Composite Applications | Collaboration: Quickr & SharePoint |
|---|---|---|---|---|---|---|

## Agile ECM Framework

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|---|---|---|---|---|

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### Federation & Integration Services
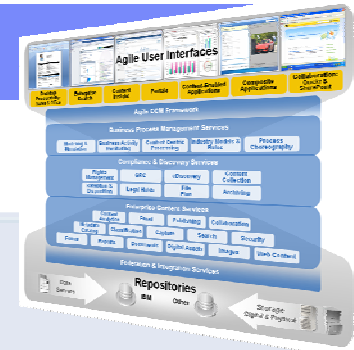
## Repositories
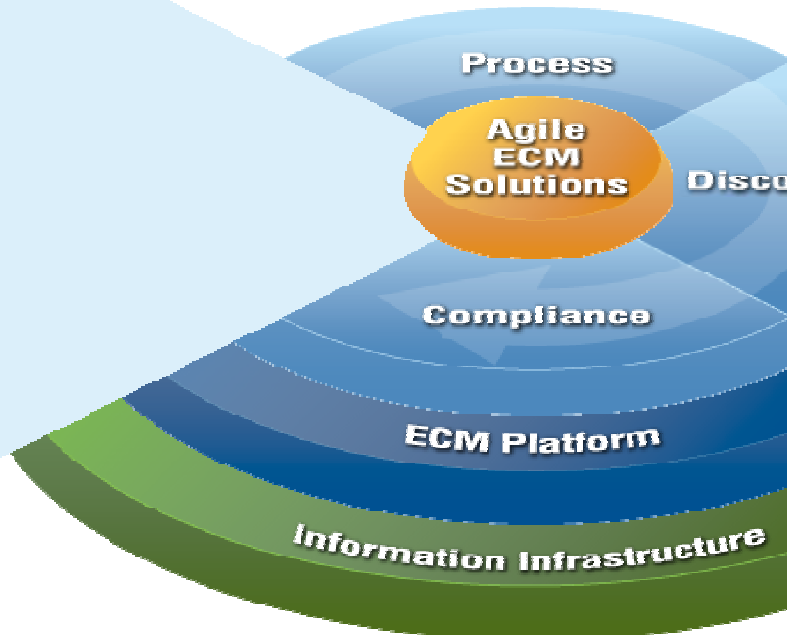
Data Servers    IBM    Other    Storage Digital & Physical

# IBM Agile ECM
## *Content Management*

- ● Business Content Services
- ● Transactional Content
- ● Document Management
- ● Content Integration

Process

Agile ECM Solutions

Disco

Compliance

ECM Platform

Information Infrastructure

**New!**

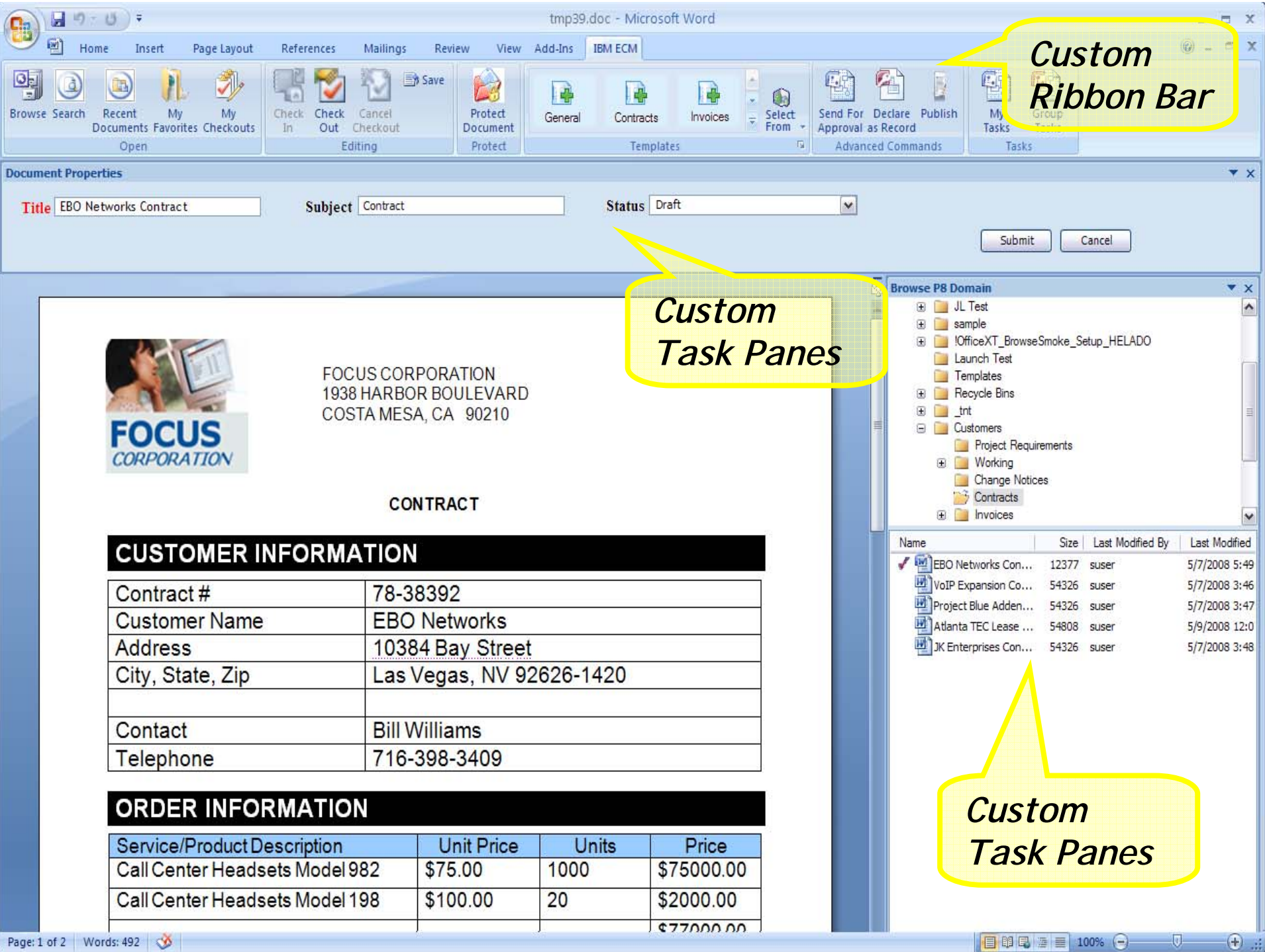### IBM FileNet P8 4.5 Content Manager

- • DITA XML support
- • Office 2007 integration
- • Quickr integration

### IBM Content Manager 8.4.1

- • Active Content support
- • Lotus Quickr integration

### IBM Content Manager On Demand 8.4.1

- • Federated Records
- • Enhanced Retention Mgt.

**Home - IBM Lotus Quickr - Mozilla Firefox**

File   Edit   View   History   Bookmarks   Tools   Help

http://localhost:10038/lotus/myquickr/!ut/p/c1/0wcA1NLTeQ!!/

Getting Started   Latest Headlines

Lotus. Quickr.          All Sources        Log Out: quikradm

Help

## IBM Lotus Quickr

**The fastest way to share everyday content across connected teams.**

Visit a place and start collaborating with others.

*ECM integration with Lotus Quickr*

● Create a Place

| Favorites | My Places | Public Places | All |

Sort by:  Title   Owner                                          Hide details

**CRM Upgrade Project**             **Acton Launch Project**
Place to collaborate about services contracts    Place to collaborate about the Acton Project
for CRM Project                         and related launch services
Owner: quikradm                         Owner: quikradm

Show: 10 | 20 | 50 | 100 | All items per page                Previous | N

Done

start    Camtasia Studio - Unt...    Lotus Quickr    Home - IBM Lotus

---

**Library - CRM Upgrade Project - IBM Lotus Quickr - Mozilla Firefox**

File   Edit   View   History   Bookmarks   Tools   Help

http://localhost:10038/lotus/myquickr/crm-upgrade-project/library/!u

Getting Started   Latest Headlines

ℹ Filed as record with id 535c5100470dd660b3abb3b3d5d0421e

ℹ Quickr document has been moved into IBM Content Manager

**CRM Upgrade Project**                          Find
Place to collaborate around services contracts for CRM Project

Create ▾

Views:   Draft Views   Shared Views   Personal Views

You are in CRM Upgrade Project ▸              Navigate by categories

**Upload**
**Edit Library Properties**
**Manage Library Elements...**

1-4 of 4

Sort by:   Name ∧   Author   Last Modified

**About This Library**
Name: CRM Upgrade Project
Description: Place to collaborate around services contracts for CRM Project
Role: Manager

☐   Backup Data ▾
    Updated 10/4/07 11:58:16 AM EDT by quikradm | First created on 10/4/07 11:58:16
    AM EDT

☐   Telephony Service Contract.doc.qkr
    Updated 10/4/07 5:08:49 PM EDT by quikradm | First created on 10/4/07 11:57:27
    AM EDT

☐   Project Justification.xls
    Updated 10/4/07 11:31:10 AM EDT by quikradm | First created on 10/4/07 11:38:28
    AM EDT

Add to Lotus Quickr connectors
Subscribe to this library
Copy links...
Help

*Documents can be filed in P8 or CM8 libraries with a "stub" for easy access for the Quickr user*

Drag desktop

Done

start    Camtasia Studio - Unt...    Lotus Quickr    Library - CRM Upgrad...    5:08 PM  Thursday  10/4/2007

# Creating DITA Technical Documents



**Topic Authors**

**Technical Editors**

**Copy Editor**

| Author (Write) Topics | Technical and Editorial Review of Topics | Topic Map and Copy/Edit | Publish |
|---|---|---|---|
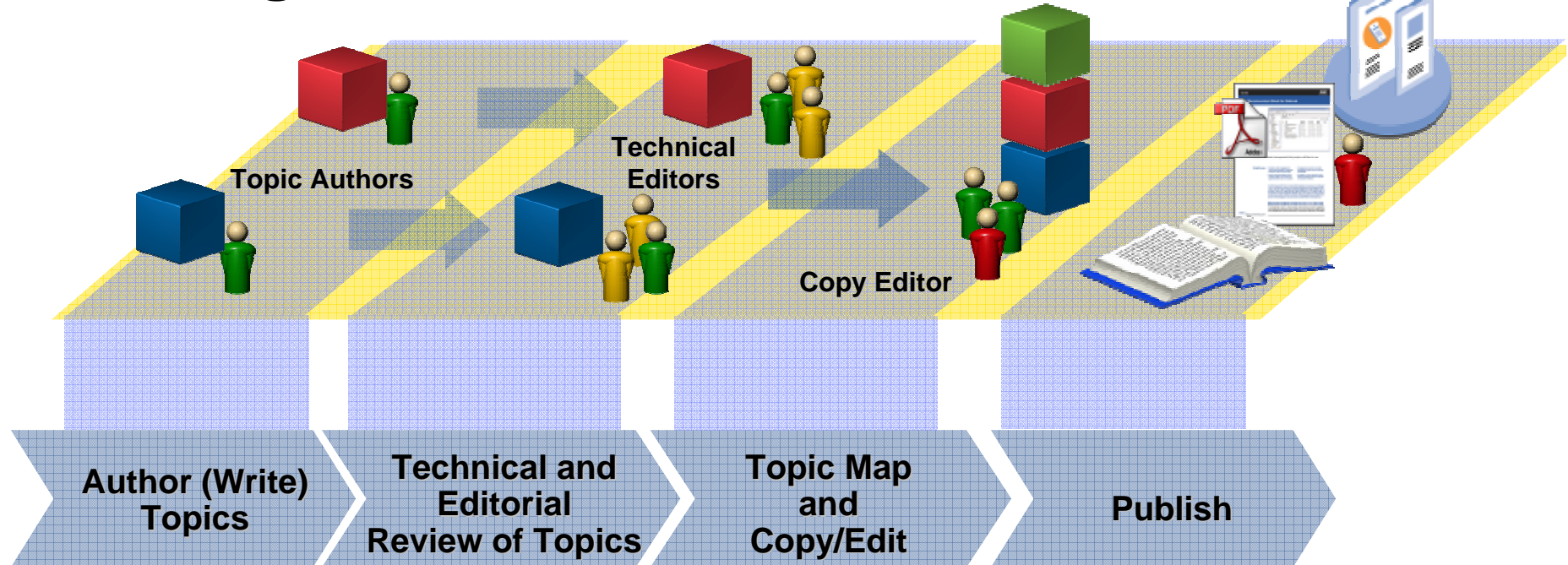
- Complete XML authoring & reuse

- Collaboration and Business Process Management (BPM) for reviews

- Create and validate topic maps

- Transform and deliver to multiple publishing channels

# Announced 9/10/08:
## *Content Management Interoperability Services (CMIS)*
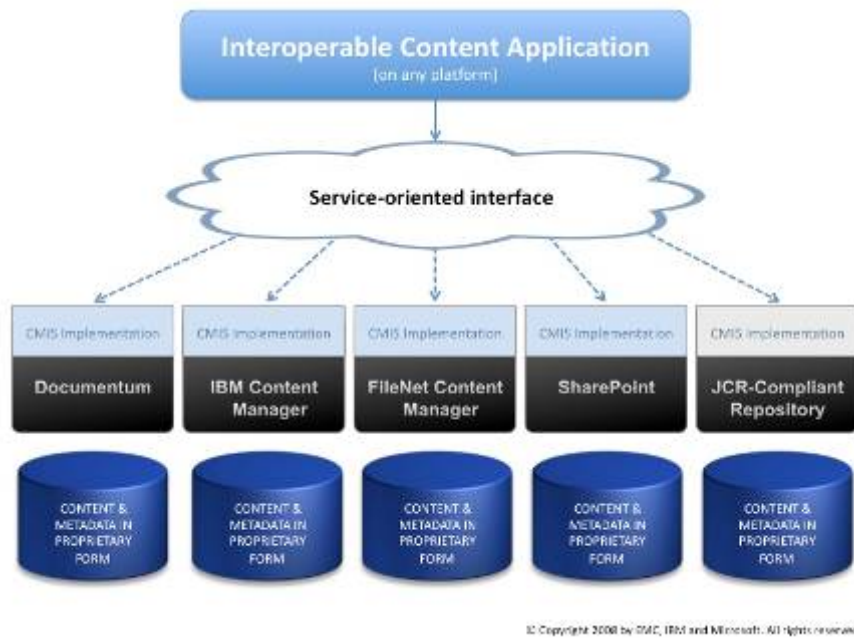


EMC, IBM AND MICROSOFT JOINTLY CREATE
FIRST WEB SERVICES INTERFACE SPECIFICATION
FOR GREATER INTEROPERABILITY OF
ENTERPRISE CONTENT MANAGEMENT SYSTEMS
Trio joined by Alfresco, OpenText, Oracle, and SAP in Development of
The Content Management Interoperability Services (CMIS) Specification
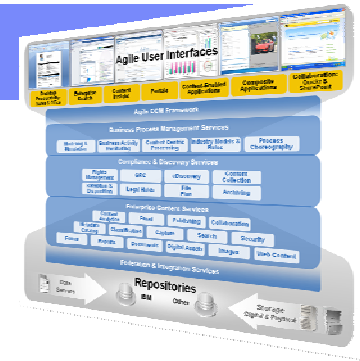
# IBM Agile ECM
## *Content-Centric Business Process Management*

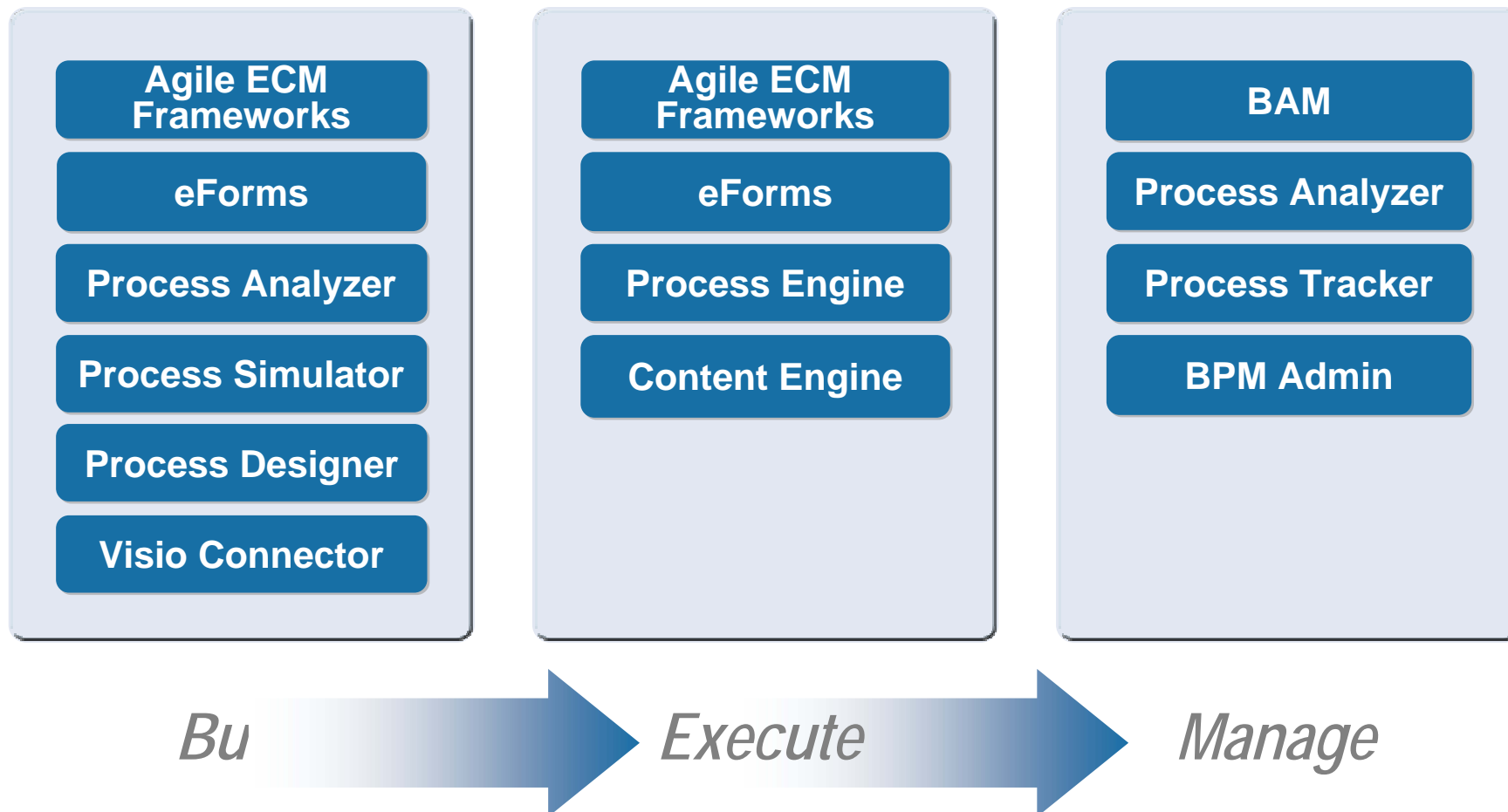● Design    ● Simulate    ● Execute    ● Monitor    ● Optimize
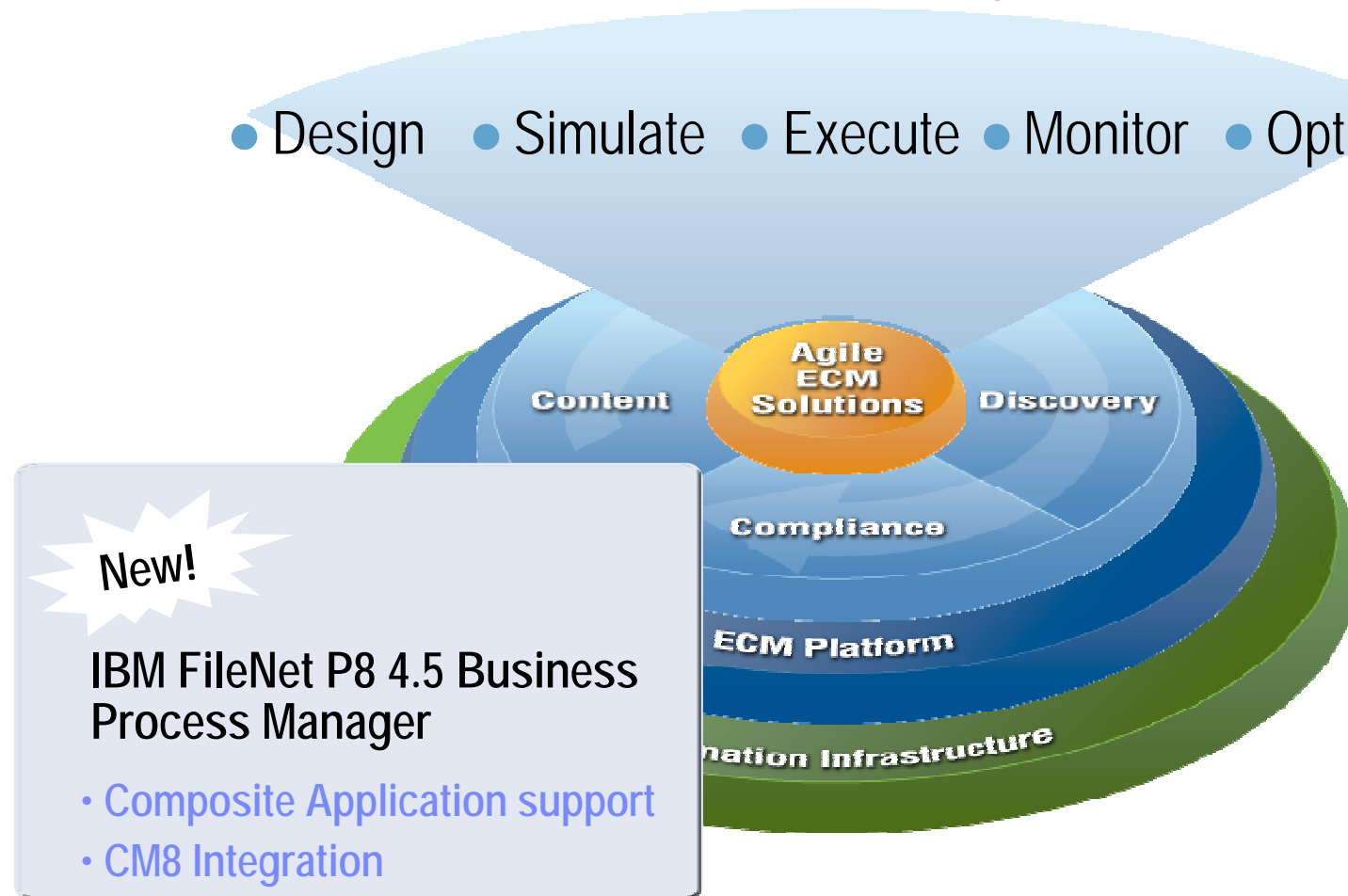
**New!**

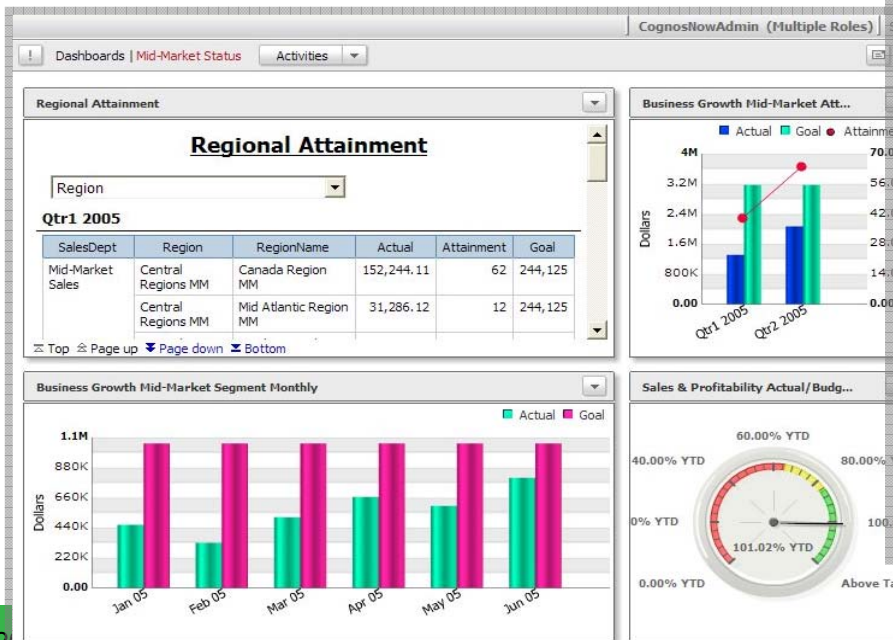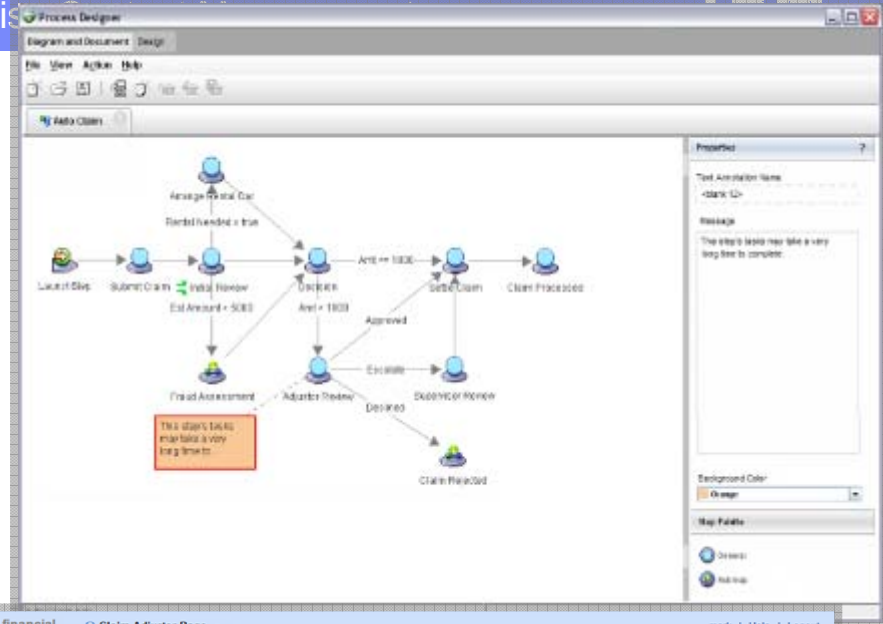## IBM FileNet P8 4.5 Business Process Manager

- Composite Application support
- CM8 Integration

# IBM FileNet P8 BPM 4.5 Suite

| | | |
|---|---|---|
| **Agile ECM Frameworks** | **Agile ECM Frameworks** | **BAM** |
| **eForms** | **eForms** | **Process Analyzer** |
| **Process Analyzer** | **Process Engine** | **Process Tracker** |
| **Process Simulator** | **Content Engine** | **BPM Admin** |
| **Process Designer** | | |
| **Visio Connector** | | |

*Bu* ➡ *Execute* ➡ *Manage*

# Key Business Goals for
# IBM FileNet BPM 4.5

- Improved Process Design experience

- Shorten the time to build & deploy ECM applications

- Increase the "Line of Business" appeal

- An extensible platform with more frequent delivery of new service components

# "Agile ECM" in IBM FileNet P8 4.5

**Realize time to value by accelerating the delivery of ECM and BPM solutions**

*Why: product objective*

Enable better collaboration between business & IT users to deliver solutions

Decrease cost & effort of developing ECM and BPM solutions

Minimize steps and tools required to create and update solutions

*What: product features*

**Provide "Document and Diagram Mode" for business analysts**

**Leverage Web 2.0 Mashups & widgets for faster application layout**

**Consolidate tools & add configuration features in Process Designer**

*Provide end-to-end ECM and BPM solutions across application development stages for multiple roles*

Business User    Business Analyst    IT Developer

| Diagram & Document | Review & Refine | Complete & Validate | Test & Deploy |
|---|---|---|---|
| Diagram | Review Needs | Configure | Test |
| Document Steps | Define Roles | Validate | Code |
| Annotate Diagram | Define In-baskets | Simulate | Deploy |
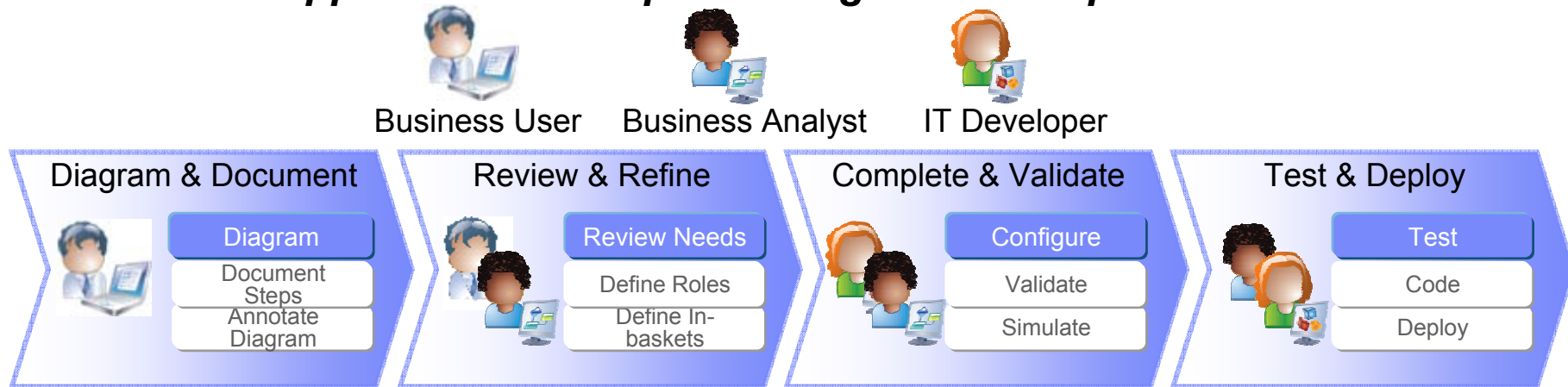
## Content-Centric BPM for IBM CM8:
### *Tight integration with IBM FileNet BPM*
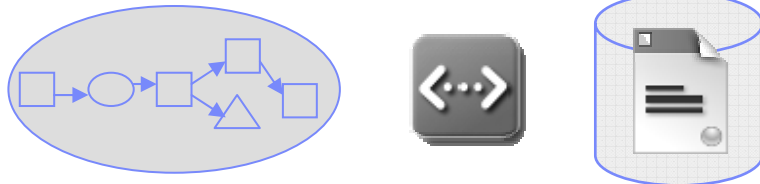
*A solution for IBM Content Manager v8 (CM8) customers who need to better automate, streamline, and optimize their content-centric processes – through the integration of CM8 with IBM FileNet Business Process Manager*

# Benefits

- Enhances business process automation, optimization, and flexibility
- Extends the reach of CM8 investments
- Provides interoperability across IBM software portfolio
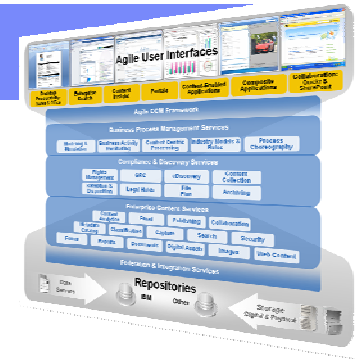
# IBM agile ECM
## *Compliance*

**New!**

## IBM Content Collector (ICC)

- Extensible content support
- Powerful content processing
- Integrated ECM repository options

**New!**

### IBM eDiscovery Manager

- Create and manage discovery cases

### IBM eDiscovery Analyzer

- Assess and refine case collections

Process

Agile ECM Solutions

Content

Discovery

- Records Management
- Content Collection & Archiving
- eDiscovery

# IBM Content Collection and Archiving Architecture
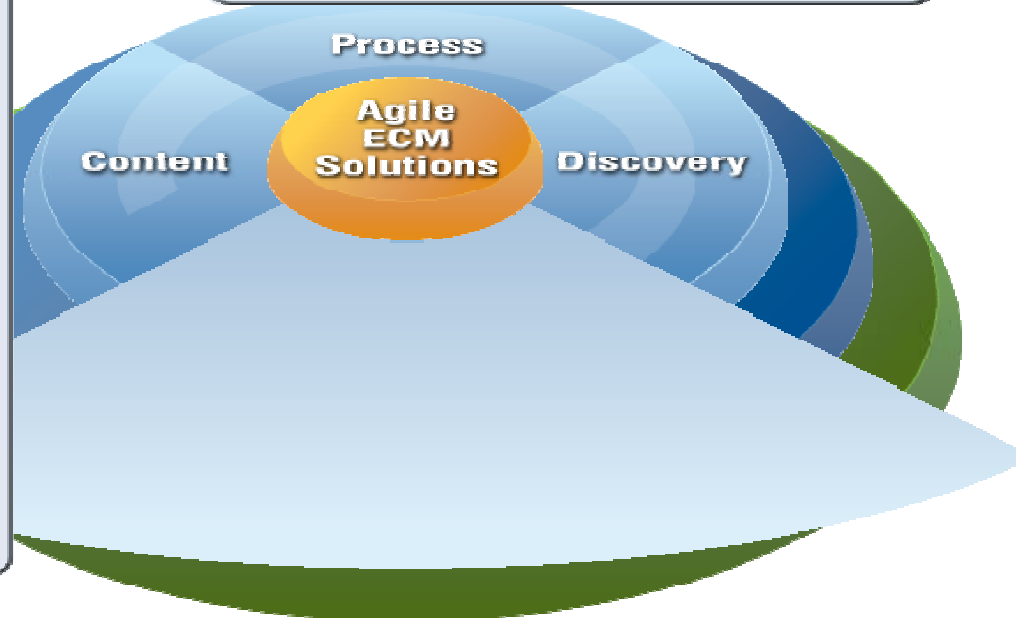
**Source Connectors**

**Policy & Task Routing Engine**

**Target Connectors**

**Task Connectors**

MESSAGING / E-MAIL
- Microsoft Exchange
- Lotus Domino
- PST content
- Instant Messaging (3rd pa...
- *NSF content*

FILE SYSTEMS
- Microsoft File System
- Desktops
- *Other File Systems*

OTHER
- Microsoft SharePoint
- *Lotus Quickr*
- *IBM Content Integrator*
- *CMIS*
- *Tivoli Storage Manager*
- *Backup Tapes*

CUSTOM
- API Support

**1**

...SKS
- R... ...cla... ...on
- Adva... ...Classificatio...
- Rendering (3rd party)

CUSTOM TASKS
- API Support / Partner Apps
- Encryption
- System Lookups
- 3rd Party Rules / Policy Mgt

**2**

...NATIVE
- ...eNet P8
- ...8
- ...eNet Image Services
- *Tivoli Storage Manager*

CUSTOM / OTHER
- Microsoft File System
- *IBM Content Integrator*
- *CMIS*

**3**

Available now
*Future options*

# eDiscovery Search & Analytics
## *Efficient litigation response enabled by proactive info management*

*Increase agility, improve defensibility, and lower cost of eDiscovery response with targeted tools to retrieve, hold, manage, assess and intelligently cull collected electronic information*
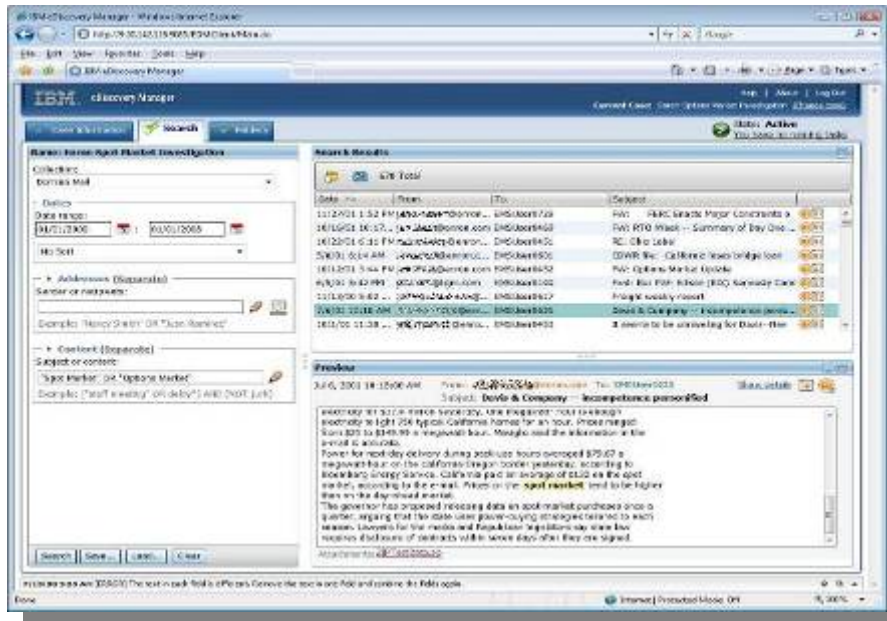
**IBM eDiscovery Manager**

- Tool for authorized IT users to help respond to discovery requests from legal
- Create and manage cases; search, assign, hold, preview, and export collected content
- Built on and integrated with ECM platform with full auditability for chain-of-custody

**IBM eDiscovery Analyzer**

- Early case assessment and smart culling for legal professionals and litigation support specialists
- Smart refinement of case collections to help dramatically reduce eDiscovery costs
- Advanced conceptual search and content analytics for rapid case insight

# A Proactive Approach to eDiscovery

**1**
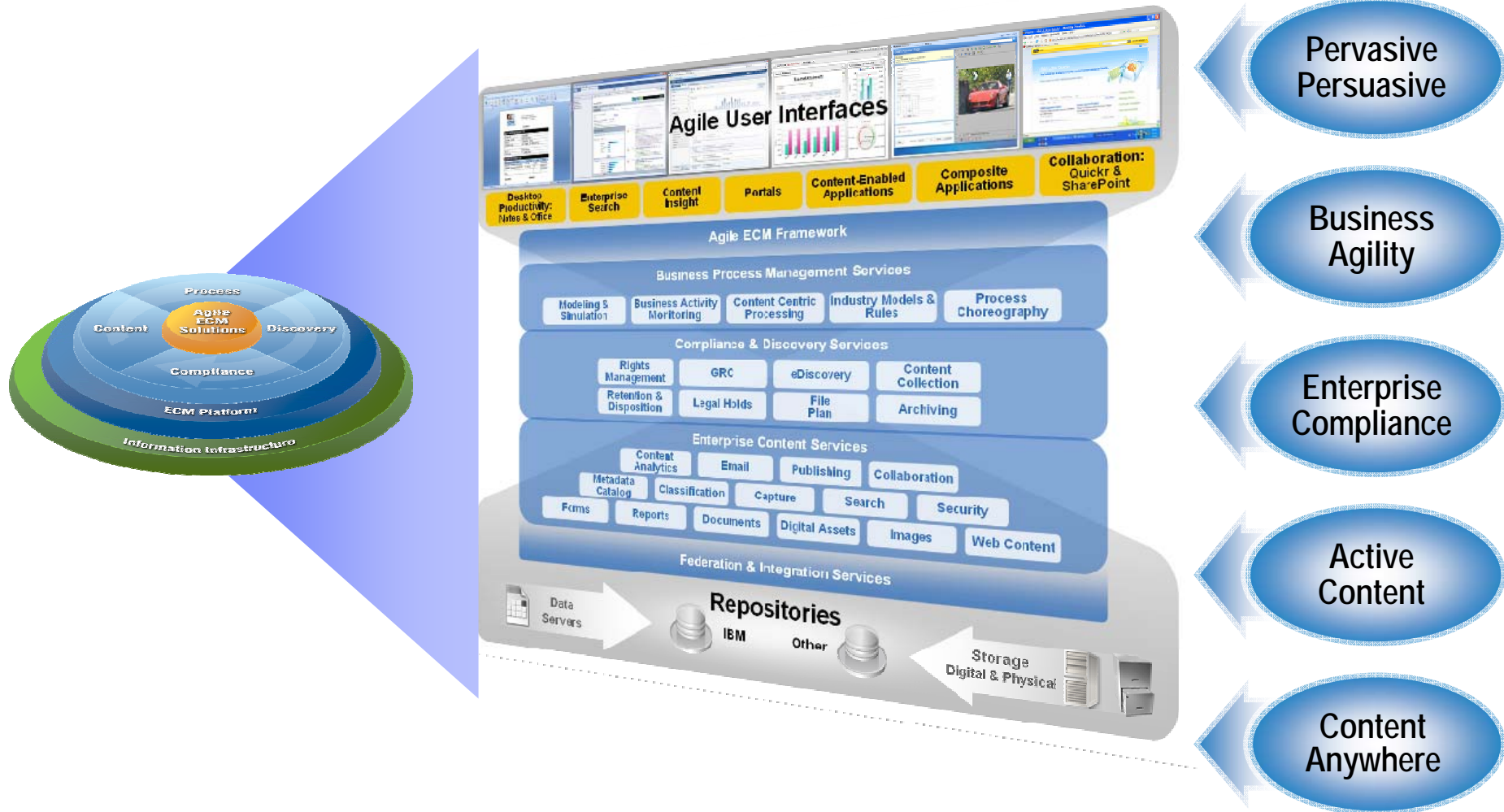
Clean Up The
Digital Landfill

Classify Content

Respond To Reactive
Collection Demands

Build Content
Inventory

Email archive silos, poorly indexed content,
multiple copies of everything, unmanaged file
systems and SharePoint have all combined to
create Digital Landfills

IBM is delivering the platform, tools and
partner solutions needed to properly manage
the 4 phases of electronic discovery

**Content
Collector - CFS**

**Electronic Discovery Reference Model**
www.edrm.net

**2**

**3**

- Initiate Holds
- Automate Content Collection
  & Culling

- Improve Early Case Assessment
- Reduce Noise
- Enhance Proactive Investigations

**eDiscovery
Manager**

**eDiscovery
Analyzer**

**Partner & Service
Provider Apps**

**4**

- Automate & Audit Legal Discovery Process

**ECM Platform**

Source: Socha Consulting and Gelbmann & Associates. Copyright 2005-2006 All rights reserved. Used with permission.

# IBM Agile ECM Platform