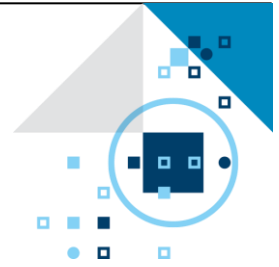


Best Practices with IBM FileNet Content Manager and IBM Content Foundation



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IBM's Industry Leading ECM Approach



Solutions



**Document Mgmt.
Imaging & Capture**



**Content
analytics**



**Advanced case
management**



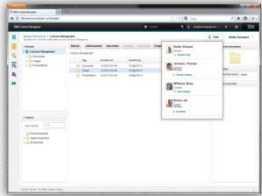
**Information lifecycle
governance**



**Social content
management**

User experience

Role Based Content User Experiences: web, mobile and desktop



Content Navigator



Mobile apps



Case Manager



Records & Analytics



IBM Collab Suite



Office Integration

ECM Platform Services: content & social

Services

Search
Interact
Discover
Ext. Data Services

Collaborate
Manage
Collect
Classify

Revise
Case Objects
Lifecycle
Processes

Integrate
Federate
Tasks, Events
Share

Tag, rate
Comment
Content Analytics
Dashboards

Infrastructure



**Business documents,
records & case content**

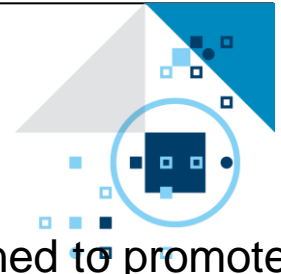


**Social, collaboration,
email, files, etc.**



**Other data, content,
systems....**

IBM Content Foundation (ICF)



- A new enterprise content management (ECM) solution from IBM, designed to promote **wider adoption of ECM** and increased application development leveraging existing and new types of content
- Designed for current and **new markets** where clients require:
 - Reduced cost and complexity
 - Enterprise Class scalability, security & stability
 - Social Content Management
 - Mobile Computing
 - Consistent OOTB User Experience: [web](#), [desktop](#) & [mobile](#)

Primary use cases

- [Document Management](#)
- [Custom Application Development](#)
- [Platform Consolidation](#)

Greater Choice for IBM ECM Customers

IBM FileNet Content Mgr 5.2

Shipped: March 2013

- **Enterprise Manageability**
 - Common Content & Process Engine
 - Web-based administration
 - Event-based document retention
 - Content file compression
 - Storage migration
 - Search optimization
- **Social & mobile capabilities**

IBM Content Foundation 5.2

Shipped: June 2013

- **Power of P8 harnessed in a new nimble, consumable, cost-effective offering**
 - Document Management
 - Custom application development
 - ECM Consolidation
- **Leverages Enterprise manageability and social & mobile capabilities**



- **Use cases unique to each will be described in this presentation**
- **Both solutions leverage the same “Content Platform Engine”**
- **Both solutions can interoperate and co-exist in a customer environment**
- **Both are strategic solutions aimed at meeting different customer requirements**
- **IBM Content Foundation is NOT a replacement for FileNet Content Manager**
- **Both offerings can support solutions such as Enterprise Records or Case Manager**

IBM Content Foundation























| | | | | |
|-----------|--------------|--|--|---------------------|
| Workplace | Workplace XT | IBM Content Navigator Web MS Office Mobile | FileNet Integration for MS Office (FIMO) | SharePoint Webparts |
|-----------|--------------|--|--|---------------------|

| | | | |
|-----------------------------|--|---|---|
| WebApp Toolkit | APIs JAVA CMIS .Net Web Services | Administration FileNet Enterprise Manager Admin Console for CPE (web) | IBM Content Analytics text search (limited use) |
| Application Engine Services | Content Platform Engine Content Engine Services Process Engine Services (limited use) Content Search Services Content Federation Services | | Rendition Engine (additional license) |

| | | |
|---|-----------------------|------------------------------------|
| Tivoli Directory Services (limited use) | DB2 ESE (limited use) | WebSphere App Server (limited use) |
|---|-----------------------|------------------------------------|

IBM's Industry Leading Approach

| IBM ECM Tenets | High Value Content Capabilities |
|--|--|
| Document Management | <ul style="list-style-type: none"> Versioning, Lifecycle, Workflows Active Content, Search Extensible Data Model Scalability and Topology |
| Custom Application Development | <p>Visual Toolkit & Modeling Layer supporting </p> <p>  Web Services </p> |
| ECM Consolidation | <ul style="list-style-type: none"> Content Federation Extensive Repository Support Social Collaboration Integration Repository w/Social Constructs Custom App Development Integrated Search/Analytics |
| Enterprise Manageability and Consumability | <ul style="list-style-type: none"> Single Content Platform Engine Simplified Database Usage Web Administration Retention Management Storage Optimization Enterprise Search |
| Extensive Platform & Open Standards Support | <p>   Web 2.0   </p> <p>  </p> |
| Consistent & Intuitive UI <i>Mobile Desktop Web</i> | <p>Content Navigator (ICN) deploys a common application layer providing consistent/intuitive UI across: mobile, desktop and web</p> <p>     </p> |
| Social Content Management | <ul style="list-style-type: none">  Social Content Repository: Tagging, Likes, Downloads, Comments, etc. IBM Connections "tight" integration |

Document Management: Managing Diverse Content

▪ Imaging/Archiving

- Scanned, PDF, eMail, ...
- Ingest, Index, Store, Manage

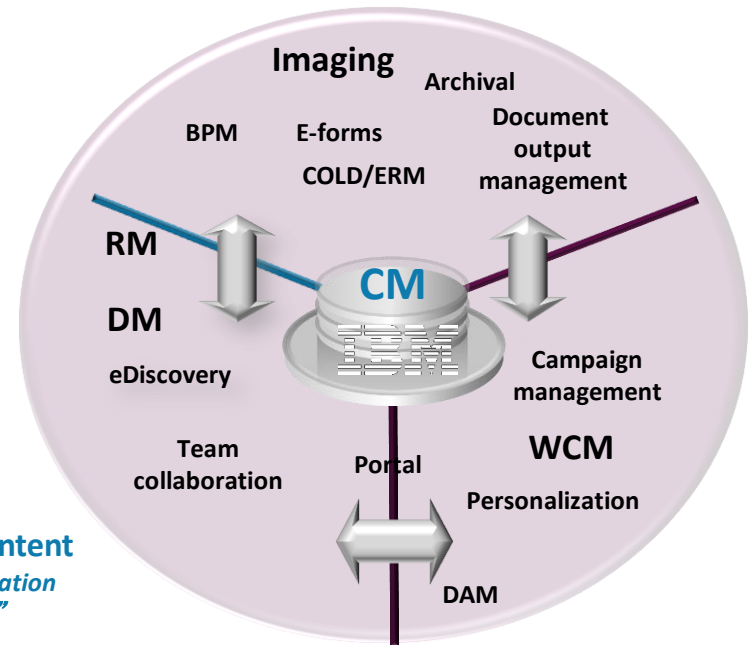
▪ Document Management

- Document Management & Collaboration
- Electronic authoring, Versioning,
- Lifecycle, Review/approval, Publish

▪ Advanced Document Management

- DITA, Engineering Drawing
- Complex publications & projects
- Componentized reuse & specialized authoring tools
- Multi channel publishing

Business Content
"Arms information workers"



Transactional content
"Processes consume content"

Persuasive Content
"Influences behavior"

The "core of ECM: Content Repository
 FileNet Content Manager

* Now also IBM Content Foundation



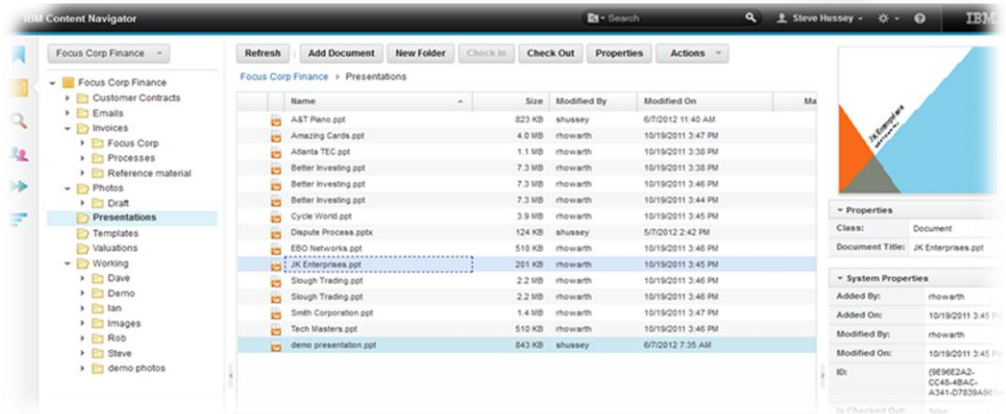
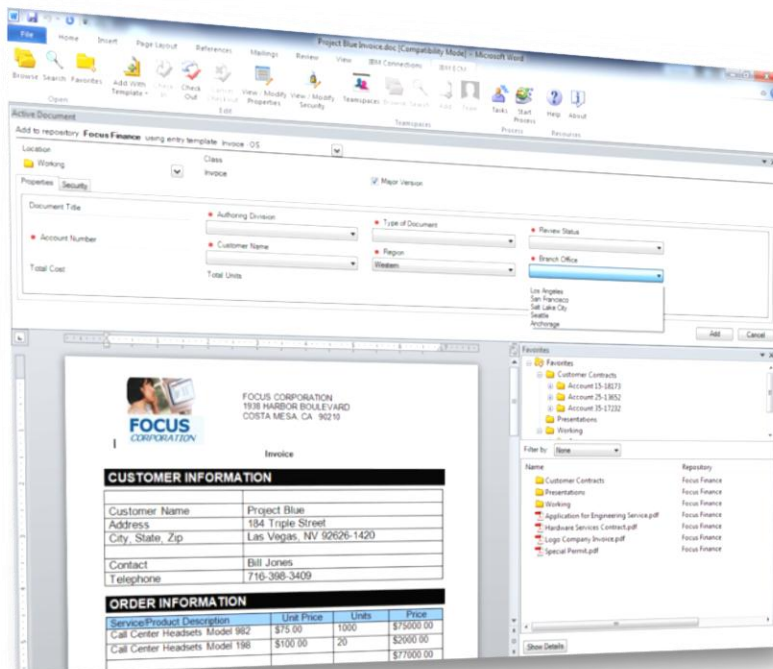
IBM Content Foundation: Document Management

Use Case:

- I need to upload and download documents and organize them in folders
- Apply simple properties and keep track of versions as I make changes

Implementation:

- Out of the box browser, MS Office and mobile user experiences
- Intuitive folder creation, adding and organizing documents, version tracking when updates are added



Benefits

- Migrate users from file shares to ECM without significant retraining
- Rapid time to value

Custom Application Development: Flexible Options

Full APIs to suit developer skills

- Java, .Net and Web Services

Standards for API and UI

- Dojo visual components
- Oasis CMIS API

Build any application, tool or integration

- Complete runtime and administration APIs

Content Navigator Toolkit

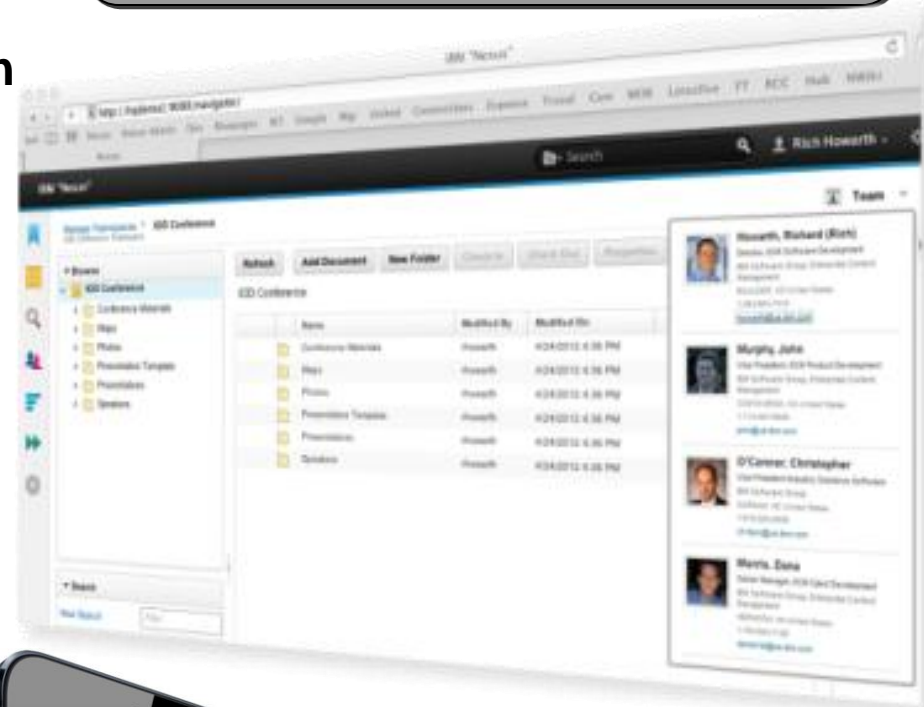
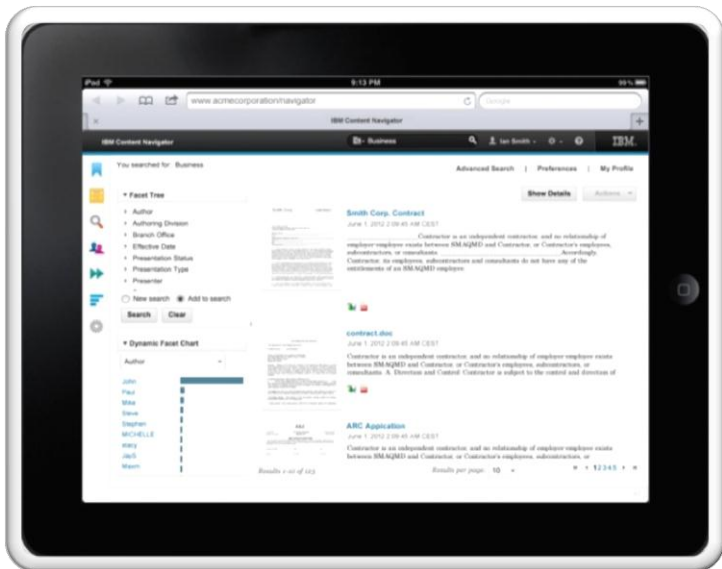
JAVA

.Net

Web Services



ECM APIs



IBM Content Foundation: ECM Consolidation

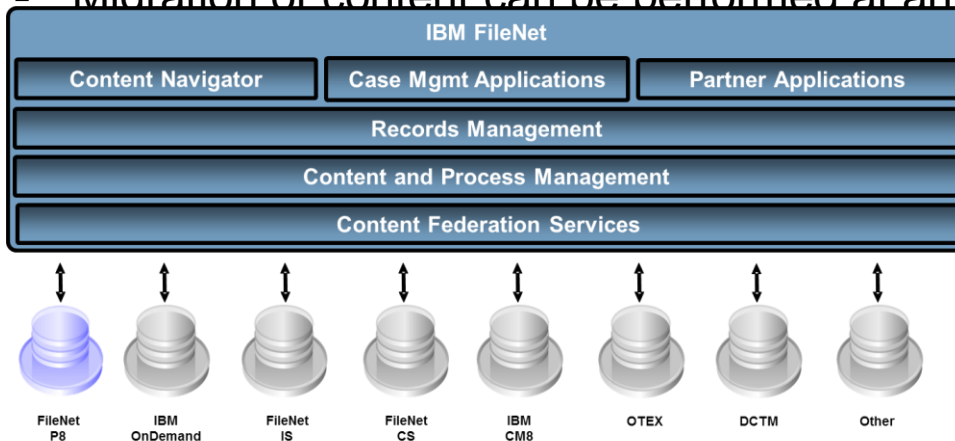


Use Case:

- I need to deliver document centric applications across multiple disparate repositories
- I need to consolidate repositories over time as applications are re-factored

Implementation

- Federation consolidates metadata or content from multiple repositories in a single P8 cataloged
- Migration of content can be performed at any time



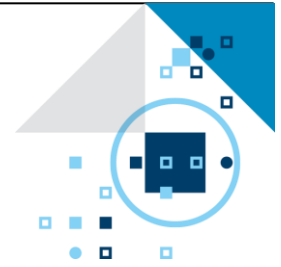
Phases for repository consolidation



Benefits

- Single-view applications can begin immediately
- Migration to a consolidated repository can be performed at a pace the business can consume

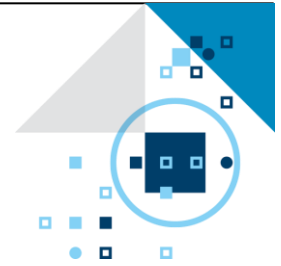
FileNet 5.2 Enterprise Manageability



- Single platform engine and single database
- Web based administration
- Time and event based document retention
- Bulk storage migration
- Document compression
- Content search optimization
- Benefits
 - Significant reduction in effort and cost to plan, install and maintain ECM services for enterprise scale deployments and high value solutions



Lower our cost of ownership



Content Engine (CE) & Process Engine (PE) now combined into a single **Content Platform Engine** with....

- A single, web-based administration tool
- Only one load balancing technology needed
- Same HA/DR characteristics

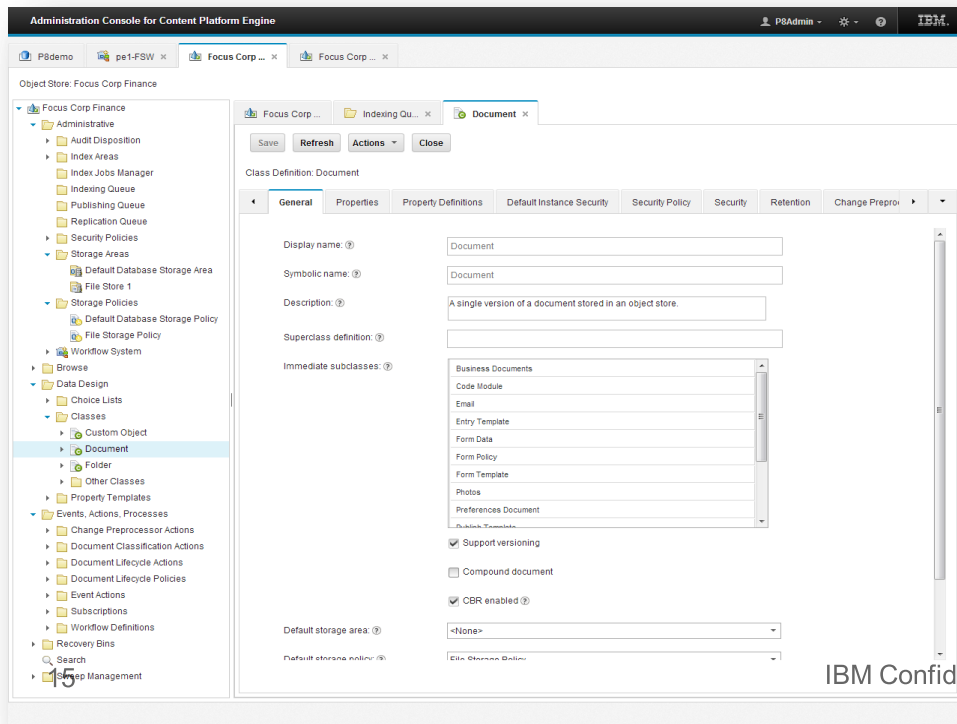
Streamlined packaging with Case and Content Foundation

- Fewer parts to manage means reduced overhead for IT
- Consumable, small footprint, easier management, custom app development, document management
- Significant reduction in effort and cost to quickly build custom apps

Web Administration Improves Consumability



- - Web 2.0 administration experience built using the Navigator framework
- - Administration console utilized and deployed in Content Platform Engine
- - Enterprise Manager also includes new capabilities: exposed through ACCE
 - e.g. Thumbnail, Retention, Storage migration job management



Benefits for Administrators

- Perform most job functions without need for an installed client application
- Use non-windows clients including UNIX/Linux and tablet devices to administer their implementation

IBM Content Foundation: Accelerate ECM Time to Value with PureSystems



ECM in a Pattern

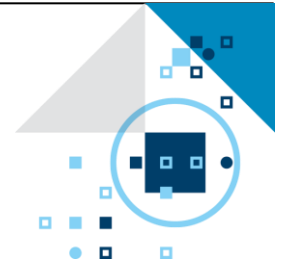
- Based on IBM FileNet P8
- Fully integrated to run in the IBM PureApplication Systems environment
- Combines the automated manageability of PureApplication Systems with the enterprise scalability of IBM ECM

Accelerate ECM Deployment

- Significantly reduces the amount of time needed to install, configure, & deploy an ECM solution
- Optimized preset pattern sizes for varying workloads
- Fast availability & rapid provisioning of an ECM platform solution for custom application development, document management, social content management, & enterprise manageability



Navigator is The ECM Experience Platform



All ECM UI Offerings converging on

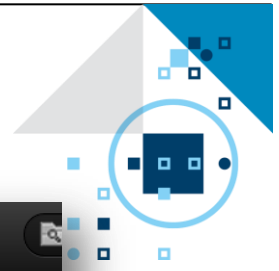
One technology platform for Mobile, Desktop & Office

Content from CM8, P8, CMOD & third-party repositories (CMIS)

NAVIGATOR

Standard UI components that are reusable
Everywhere, Anywhere

Search ... Anywhere



IBM Content Navigator

Focus Finance

All General Documents x New Cross-Repository Search x

Search Scope

Repository Edit Repository Remove

| Repository | Search Scope |
|---------------------------|-------------------|
| P8 Focus Finance | Entire Repository |
| OD Reports and Statements | InsurancePolPrint |
| CM8 | Entire Repository |

Add Mapping Edit Delete

| Mapping Name | Type | Repository |
|------------------|-------------|-------------|
| Added On | Date | Focus Finan |
| Agreement number | Text string | Focus Corp |
| Parties | Text string | Focus Finan |

Recent Searches

- All General Documents
- Document title search
- Invoice
- Contr
- Valua
- Sales Invoices and Con
- Contracts and Invoices
- Contracts by Governing

All Searches

Handwritten annotations: P8 (green), CMOD (purple), CM8 (orange)

Collaborate ...



IBM Content Navigator

Search Steve Hussey

Focus Finance

Refresh Add Document New Folder Check In Check Out Properties Actions

Focus Finance > Customer Contracts > Account 25-13652

Atec - Partner Agreement
Last Modifier: **Dana Morris** | Date Last Modified: **10/18/2013, 9:54 AM**
Comments (3) | Downloads: 26

Filter

Looks good but are the capital contributions correct?
Scott Mills 10/18/2013, 9:56 AM

I just confirmed with Dale that the co
Scott Mills 10/18/2013, 9:57 AM

Thanks Scott for double checking o
Ian Story 10/18/2013, 10:01 AM

Press Enter to add your comment

Version: 1.0

| Originator | Version | Date |
|--------------|---------|---------------------|
| Steve Hussey | 1.0 | 9/18/2013, 9:14 AM |
| P8Admin | 1.0 | 9/19/2013, 12:36 PM |
| Dana Morris | 1.0 | 9/26/2013, 4:35 PM |
| Ian Story | 1.0 | 9/30/2013, 12:15 PM |
| Scott Mills | 1.0 | 10/18/2013, 9:54 AM |

Atlanta TEC - Updated Contract
Last Modifier: **Scott Mills** | Date Last Modified: **10/18/2013, 9:54 AM**
Comments (0) | Downloads: 13

Atlanta TEC Capital Lease Contract
Last Modifier: **Rich Howarth** | Date Last Modified: **10/19/2011, 3:20 PM**
Comments (0) | Downloads: 13

Atlanta TEC Computer Hardware Contract.pdf
Last Modifier: **Scott Mills** | Date Last Modified: **9/16/2013, 8:30 AM**
Comments (0) | Downloads: 14

Atlanta TEC Invoice1.doc

10/25/2013, 11:45 AM - The Account 25-13652 folder returned 8 items.

Comments

Download Counts

Activity Tracking: who's downloading, what version, and when

Partnership Agreement for Atlanta TEC
Contract Number: 123-91234

I. Formation
The partnership hereby formed a General Partnership is, and in accordance with the terms of this Agreement (the "Agreement").

II. Name
The name of the Partnership shall be (Partnership Name).

III. Term
The Partnership shall begin on (Date) and shall continue until (Date) of the same year and thereafter from year to year unless otherwise terminated as hereinafter provided.

IV. Purpose
The purpose of this Partnership shall be to invest the assets of the Partnership in stocks, bonds, and securities for the financial and substantial benefit of the Partners, which investment shall include the purchase and redemption of assets and securities.

V. Management
All management shall be held regularly as determined by the Partnership.

VI. Capital Contributions
Each Partner shall contribute to the Partnership the amount of capital (Amount) as set forth in the Schedule of Contributions attached hereto, which amount shall be paid in cash or in kind, as specified in the Schedule of Contributions, and shall be paid to the Partnership within the time specified in the Schedule of Contributions.

VII. Allocation of Profits and Losses
The net profits and losses of the Partnership shall be allocated to the Partners in the proportion of their respective contributions to the Partnership as set forth in the Schedule of Contributions.

VIII. Withdrawal
Any withdrawal or withdrawal of a Partner shall be subject to the terms and conditions set forth in the Schedule of Contributions.

IX. Dissolution
The Partnership shall be dissolved upon the occurrence of any of the events set forth in the Schedule of Contributions.

X. Governing Law
This Agreement shall be governed by the laws of the State of (State).

Y. Entire Agreement
This Agreement constitutes the entire agreement between the Partners and shall supersede all other agreements, understandings, and negotiations between the Partners.

Z. Signatures
The signatures of the Partners shall be a condition precedent to the effectiveness of this Agreement.

Originator: Steve Hussey, P8Admin, Dana Morris, Ian Story, Scott Mills
Version: 1.0
Date: 9/18/2013, 9:14 AM; 9/19/2013, 12:36 PM; 9/26/2013, 4:35 PM; 9/30/2013, 12:15 PM; 10/18/2013, 9:54 AM

Type of Document: Separation Contract
Review Status: Under review
Target Agreement Date: 11/29/2011, 10:00 PM
Governing Law: Alaska; California; Oregon; Washington

Collaborate ...



IBM Content Navigator Search Steve Hussey

Focus Finance

Refresh Add Document New Folder Check In Check Out Properties Actions

Focus Finance > Customer Contracts > Account 25-13652

Thumbnails View

Atec - Partner Agreement
Last Modifier: Dana Morris | Date Last Modified: 10/23/2013, 7:51 AM
Comments (3) | Downloads: 26

Filter

| | |
|---|--------------|
| Looks good but are the capital contributions correct? | Version: 1.0 |
| Scott Mills 10/18/2013, 9:56 AM | |
| I just confirmed with Dale that the contributions are correct | Version: 1.0 |
| Scott Mills 10/18/2013, 9:57 AM | |
| Thanks Scott for double checking on this! | Version: 1.0 |
| Ian Story 10/18/2013, 10:01 AM | |

Press Enter to add your comments.

Atlanta TEC - Updated Contract
Last Modifier: Scott Mills | Date Last Modified: 9/16/2013, 8:30 AM
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Atlanta TEC Capital Lease Contract.pdf
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Atlanta TEC Computer Hardware Contract.pdf
Last Modifier: Scott Mills | Date Last Modified: 9/16/2013, 8:30 AM
Comments (0) | Downloads: 14

Atlanta TEC Invoice1.doc

Partnership Agreement for Atlanta TEC
Contract Number: 123-91234

II. Formation
The undersigned hereby form a General Partnership in, and in accordance with the laws of, the State of (State).

III. Name
The name of this Partnership shall be (Partnership Name).

IV. Term
This Partnership shall begin on (Date) and shall continue until (Date) of the same year and thereafter from year to year until terminated as hereinafter provided.

V. Purpose
The purpose of this Partnership shall be to assist the party of this Partnership in doing, the carrying of the business and all other duties and obligations of the Partnership which may be required by law and the best interests of the Partnership.

VI. Meetings
Regular meetings shall be held regularly as determined by the Partnership.

VII. Capital Contributions
Each Partner shall contribute to the Partnership the amount of (Amount) in cash or (Specify) in kind. The Partnership shall have the right to demand the contribution of any Partner who has not made the contribution as provided herein. (Amount) in cash or (Specify) in kind. Regular meetings shall be held as provided herein, and the amount of the contribution shall be determined by the Partnership. The Partnership shall have the right to demand the contribution of any Partner who has not made the contribution as provided herein.

VIII. Valuation of the Partnership
The Partnership shall have the right to determine the fair market value of the assets and liabilities of the Partnership, (Specification) as to the value of the Partnership, and to demand an appropriate valuation and the Partnership shall be bound by the valuation date of each meeting.

IX. Capital Accounts
Each Partner shall be deemed to have a capital account in the name of such Partner. Any increase or decrease in the value of such Partnership or any withdrawal shall be credited or debited, respectively, to such Partner's capital account in that name, and such Partner shall be deemed to have a capital account in that name. The Partnership shall have the right to demand the contribution of any Partner who has not made the contribution as provided herein. Each Partner's contribution to, or withdrawal from, the Partnership shall be deemed to be made, respectively, to the Partner's capital account.

Inline property editing in browse view

Properties Edit

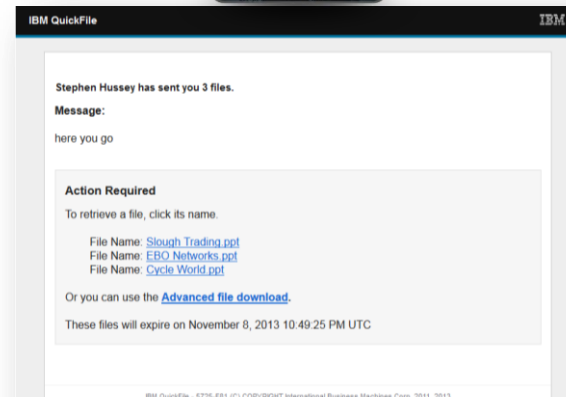
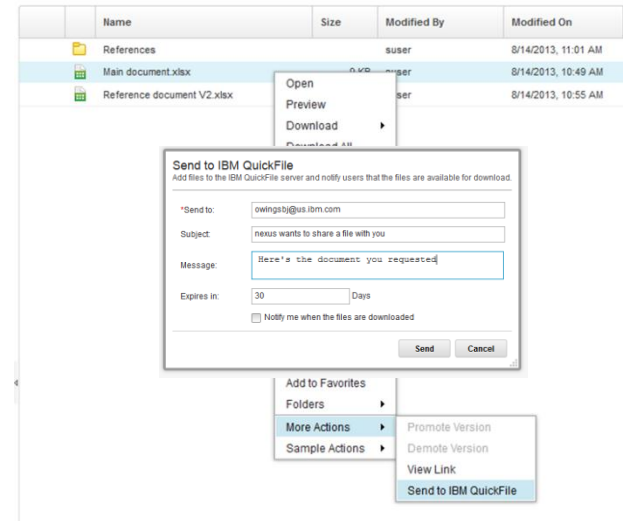
| | |
|------------------------|--|
| Class: | Contract |
| Document Title: | Atec - Partner Agreement |
| Authoring Division: | Legal |
| Type of Document: | Separation Contract |
| Review Status: | Under review |
| Target Agreement Date: | 11/29/2011, 10:00 PM |
| Governing Law: | Alaska; California; Oregon; Washington |

10/25/2013, 11:45 AM - The Account 25-13652 folder returned 8 items.

IBM Content Navigator and IBM QuickFile

Security-rich, highly reliable file transfer for business users

- Secure, reliable file exchange regardless of size
 - Any repository managed documents
 - Inside and outside of organizations
 - Person-to-person file transfers
- Benefits
 - File transfer without need for IT involvement.
 - Timed file availability
 - Confirmed download
 - ...
- Limited use license with Navigator



FileNet Document Review and Approval

- Launch review and approval on any document in seconds
- Browser and Office applications
- Simple to engage with peers
- Parallel and sequential
- Attach supporting documents or folders

Started by: suser

Properties Attachments

* Reviewers: Fred Flintstone

* Workflow name: Review for Loan approval document.docx

Approvals required: All

Instructions for reviewers:

If the work item is rejected:
 Return to me
 Return to the previous reviewer

Additional settings:
 Allow reviewers to reassign this review
 Notify me when the review is complete

Due date: M/d/yyyy

Launch Workflow Cancel

Started by: suser

Properties Attachments

* Reviewers: Fred Flintstone

* Workflow name: Review for Loan approval document.docx

Approvals required: All

Instructions for reviewers:

If the work item is rejected:
 Return to me
 Return to the previous reviewer

Additional settings:
 Allow reviewers to reassign this review
 Notify me when the review is complete

Due date: M/d/yyyy

Launch Workflow Cancel

With a parallel workflow, users can specify the Approvals required setting to all, a specific number of reviewers or a specific percentage of reviewers.

IBM Content Navigator, Integration for Microsoft Office

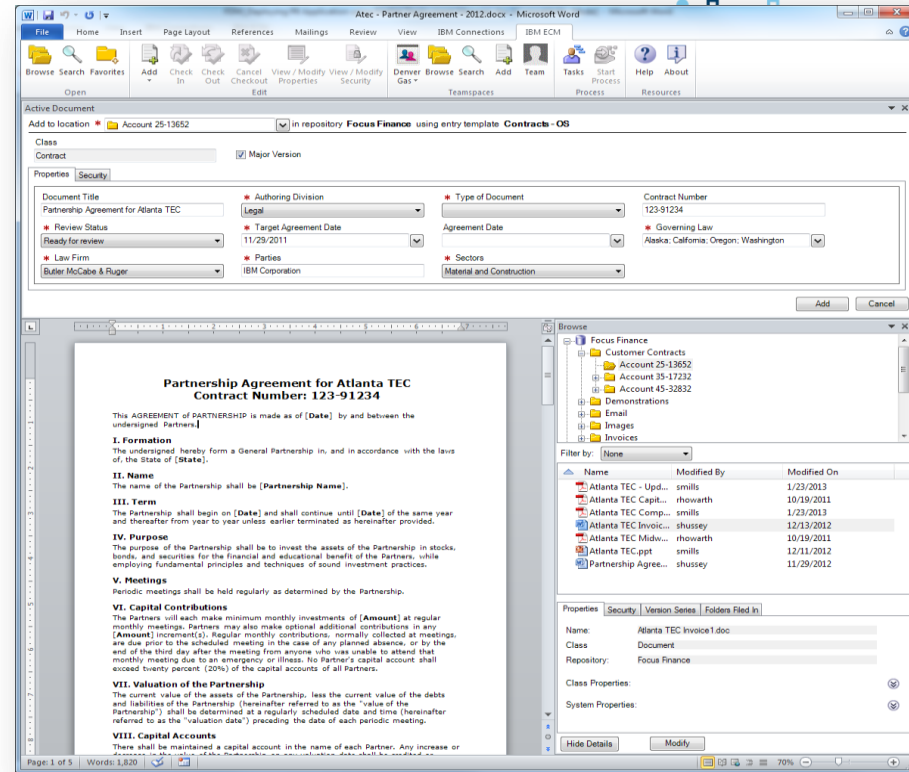
Use Case

- I work solely in email, document, spreadsheet and presentation applications. I need to manage retrieve, add and versioning documents via Office



Implementation

- Heads down MS Office productivity experience
 - Browse, search, favorites, teamspaces
 - Add, update
 - Review / approve
- Simple and accurate classification
 - Classification templates
 - External lookups
 - Automatic document properties to repository property mapping
- Office 2010 and 2013 32-bit and 64-bit



Benefits

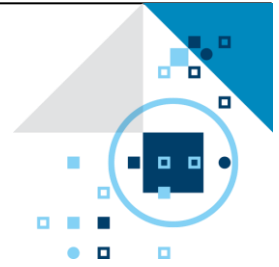
- Users will be very productive working with managed documents without needed to use any other user experience

iOS Mobile



- Browse, search, and share content from the iPad / iPhone
- Access shared searches and favorites
- Author personal searches
- Add and edit content
- External data integration

- ⑩ Integration with IBM Datacap
- ⑩ HTML5 Worklight sample project for custom mobile development
- ⑩ Limited use license of Worklight Developer Studio included



**FileNet Content Manager
does everything that
IBM Content Foundation does**

PLUS

supports these additional use cases.....

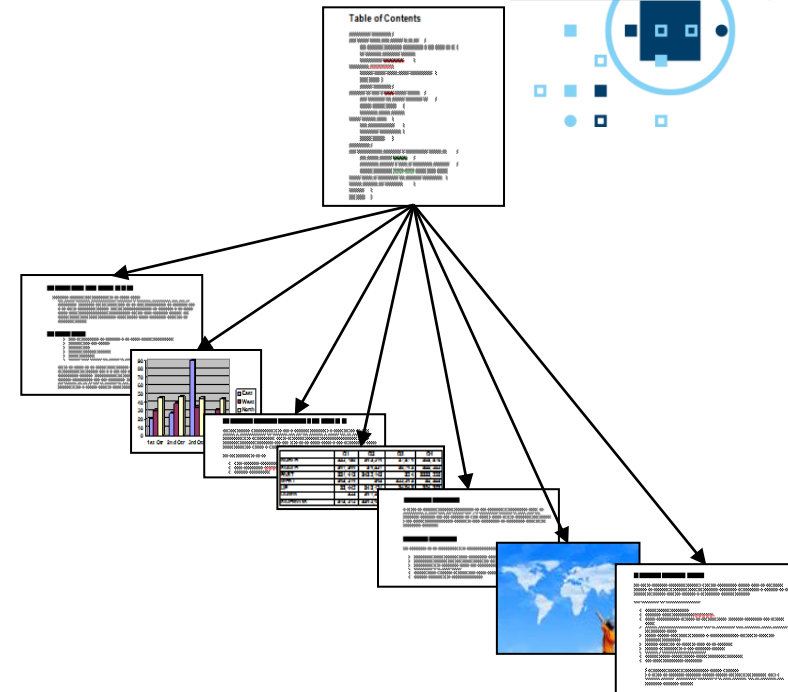
Engineering project/publication management

Use Case

- I work with engineering drawings or complex multi-part documents as part of projects
- I need to be able to manage multiple interrelated documents on different authoring cycles throughout the project lifetime.

Implementation

- Workplace and Workplace XT allow users to interact with compound documents
- Partner solutions utilize a rich object model including folder specialization, links between documents, multi level parent and child relationships with enforced integrity and more



Benefits

- Advanced applications can rely on enterprise repository services to ensure consistency, integrity and reusability for documents and projects

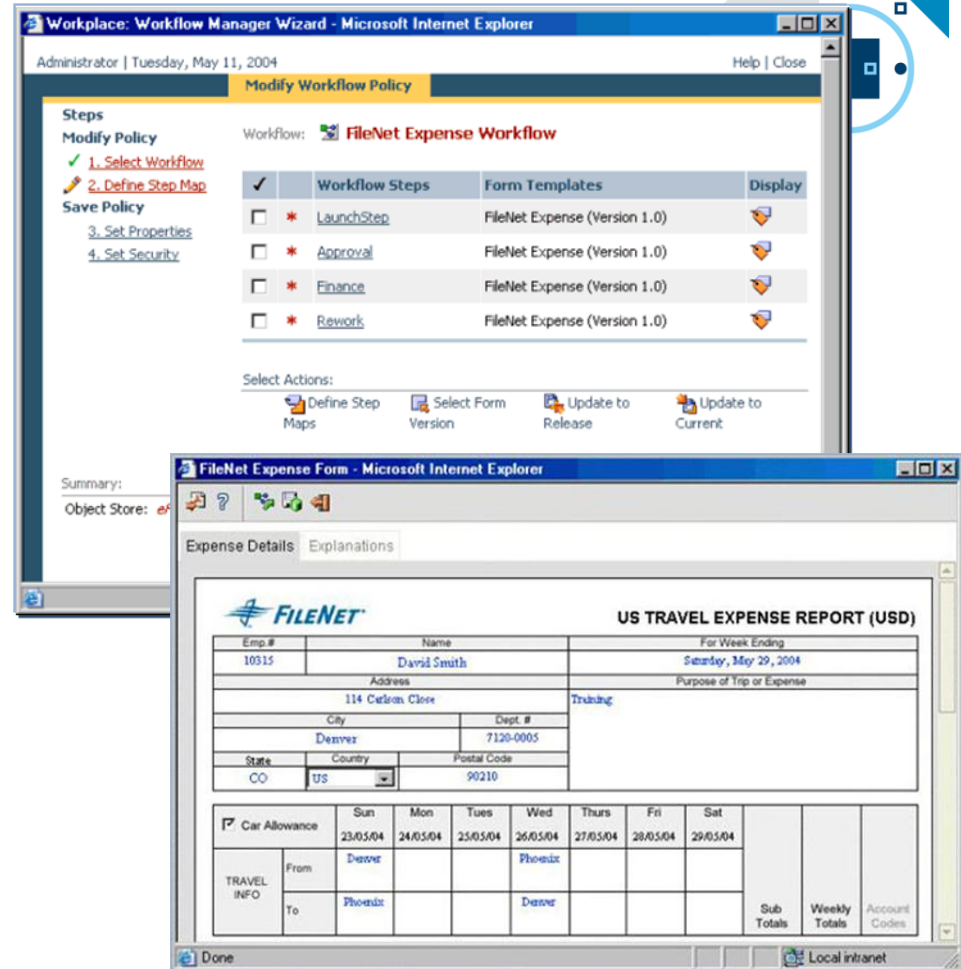
Forms processing

Use Case

- I need to fill in and view detailed forms which mirror paper forms as part of a business process or activity. Forms must be stored, have change history maintained. In some cases forms will need to be electronically signed

Implementation

- FileNet eForms or IBM forms can be used as both documents and process task user interfaces providing high fidelity forms
- Forms can be highly interactive and guide the user to correct data entry



Benefits

- Customers can effectively manage moving towards paperless forms processes

High end document management

Use Case

- I need to deliver a tailored user experience to ensure accurate and complete document categorization while maintaining well-defined security.
- I must provide a guided search experience targeted to the business productivity of users in specific roles

Implementation

- Entry templates refine and control folders to document types, property values and choices, predefined security and more
- Complex application specific searches can be provisioned to applications and roles. Detailed presets for criteria and self executing searches can be created

Modify Entry Template

Class: Contract

| Required | Property | Default Value | Access Level |
|--------------------------|-----------------------|--|--------------|
| <input type="checkbox"/> | Document Title | | Editable |
| * | Authoring Division | Legal | Editable |
| * | Type of Document | | Editable |
| <input type="checkbox"/> | Contract Number | | Editable |
| * | Review Status | Ready for review | Editable |
| * | Target Agreement Date | 11/29/11 <input type="text"/> Clear (MM/d/yy) | Editable |
| <input type="checkbox"/> | Agreement Date | <input type="text"/> Clear (MM/d/yy) | Editable |
| * | Governing Law | "Alaska"; "California"; "Oregon"; "Washington" <input type="text"/> Change Value | Editable |
| * | Law Firm | Butler McCabe & Ruger | Editable |

Search Template

Subfolders | **AND** Search Criteria | Format Results

Object Stores (single) | Object Types

Construct a search by entering property and/or content conditions. Please note that the content conditions only search for documents.

Current View: Document

| View | Property | Operator | Value |
|----------|------------------|-----------------------------|-----------------|
| Editable | Account Number | is equal to | |
| Hidden | Application Name | is equal to | General Counsel |
| Editable | Customer Name | is equal to | Atlanta TEC |
| Required | Date Checked In | is greater than or equal to | Apr 11, 2013 |

AND Property & Content conditions

| View | Words/Phrases | Modifiers |
|-----------|--------------------|-----------|
| Read Only | Contract Agreement | All |
| Read Only | Legal | None |
| Editable | Focus Corporation | None |

Maximum Results: 100

Benefits

- Application owners are able to deliver many high productivity solutions with stringent needs for control and access without requiring costly development

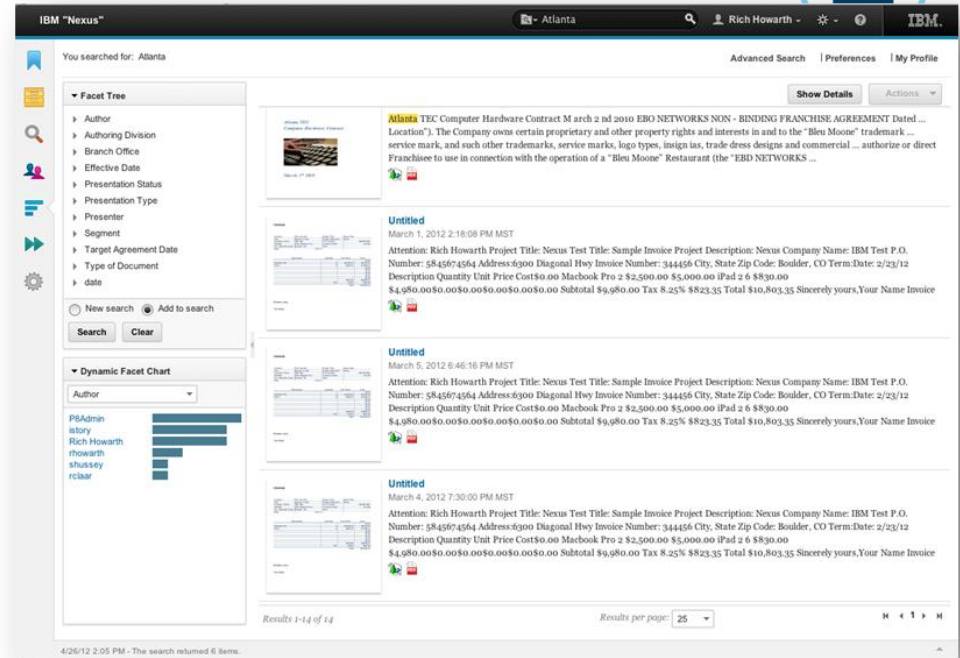
Enterprise Search with Content Analytics

Use Case

- As a user I need to discover documents in any repository or source I have access in an intuitive search experience without prior knowledge of where the content resides or exact criteria needed to find it

Implementation

- IBM Content Analytics text search allows users to start with simple key words and refine results with facets derived from properties and document content in an intuitive guided search experience



Benefits

- Business users can be more effective in locating valuable content regardless of location or classification

Tejon Ranch Company uses case management and social collaboration to efficiently manage diverse operations

ROI of nearly USD4 million

within 3 years by linking electronic documents to automated workflow

Sustainable growth

with tools that allows small staff to coordinate activities of hundreds of vendors, suppliers and contractors

Reduced IT costs

with systems that do 3 times as much while requiring only 2 new employees



Solution Components

- IBM® FileNet® Content Manager
- IBM Case Foundation
- IBM Case Manager
- IBM Content Collector for Email
- IBM Enterprise Records
- IBM Content Navigator
- IBM Datacap Taskmaster Capture



Business Challenge: To grow the business without increasing overhead, Tejon needed to build on its technology investment. However, the range and variety of Tejon operations complicated the search for solutions.

The Solution: Tejon extended its IBM Enterprise Content Management platform with case management, mobility and collaboration tools. By centering content and processes around cases, the company get more done in less time. Fewer than 200 employees can effectively coordinate the activities of hundreds of contractors and suppliers on the ranch and more than 5,000 consultants and other groups that manage operations from the outside.

“We are looking at a 3-year ROI of between USD2 million and USD4 million with the IBM solution. But as for the value it has brought to the company in terms of transforming the way we do business, the worth is beyond any estimate.”

—Richard Daley, director of records and information management

Security First Insurance analyzes social media posts to resolve a high volume of customer claims after a major disaster



Advances social media

into an actionable communications channel during a major disaster

Speeds processes

by initiating claims with information from email and social media posts

Prioritizes requests

by analyzing communications content for keywords denoting significant damage or distress



Business Challenge: When tens of thousands of customers rush to contact their insurance company after a natural disaster, smartphones and social media are often their communications channels of choice. Security First Insurance wanted to find a way to quickly and efficiently assist customers who use other-than-traditional methods to contact the company, especially when all other lines of communication are down.

The Smarter Solution: Working with IBM Business Partner Integritie, Security First Insurance deployed a content management and analytics solution to integrate incoming social media and email requests into a single interface. Using IBM technology, the system automatically prioritizes and routes requests to Security First Insurance employees based on the content of the message, expediting the resolution process for customers.

“When customers contact us through their iPhones, Facebook, Twitter, LinkedIn or email, they receive the same timely attention as when they call the company or go to our web portal.”

—Werner Kruck, chief operating officer



Solution Components

- IBM® Content Analytics with Enterprise Search
- IBM Content Collector for Email
- IBM FileNet® Content Manager
- IBM Business Partner Integritie

A North American University transforms millions of documents into active content for faster response at lower cost



98% reduction

in document access time, down from 15-30 minutes to less than a minute

Recycling roomfuls of paper

and eliminating thousands of square feet in storage space

Improving productivity

with less staff time spent handling and searching for paper documents



Business Challenge: The University's administrative content included six to nine million sheets of paper in storage rooms across multiple buildings. Instead of relocating the content when consolidating administrative offices, Yale decided to implement an enterprise content management (ECM) system to scan, digitize, organize, store and share documents.

The Solution: Today, approximately 500 employees in 13 departments access the IBM Enterprise Content Management platform to manage and share electronic documents and files in a clustered, virtualized and high-availability environment.

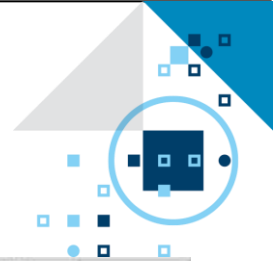
"The IBM solution helped the administrative departments get their content in order, making each document more valuable to them. Now they can find whatever they need quickly, which also improves productivity."

—manager of technical analysis, a North American University

Solution Components

- 10 IBM® FileNet® Content Manager
- 10 IBM Case Foundation
- 10 IBM Enterprise Records
- 10 IBM Content Collector for Microsoft SharePoint
- 10 IBM Content Navigator
- 10 IBM Software Services for Enterprise Content Management

IBM Smarter Content is leading the way



‘IBM continues to show vision by focusing on solutions that traverse the existing product silos within IBM.’

– Gartner
September 2013



Source: Gartner, Magic Quadrant for Enterprise Content Management, 23 September 2013, G00253757

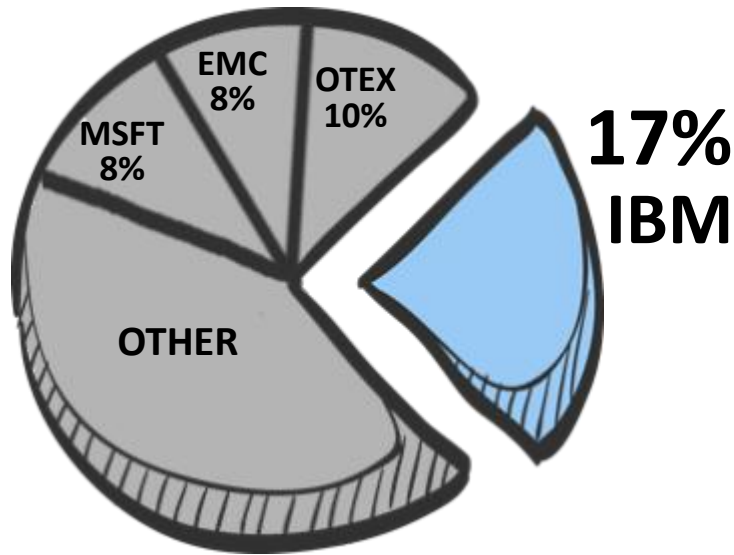
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IBM Smarter Content is taking market share



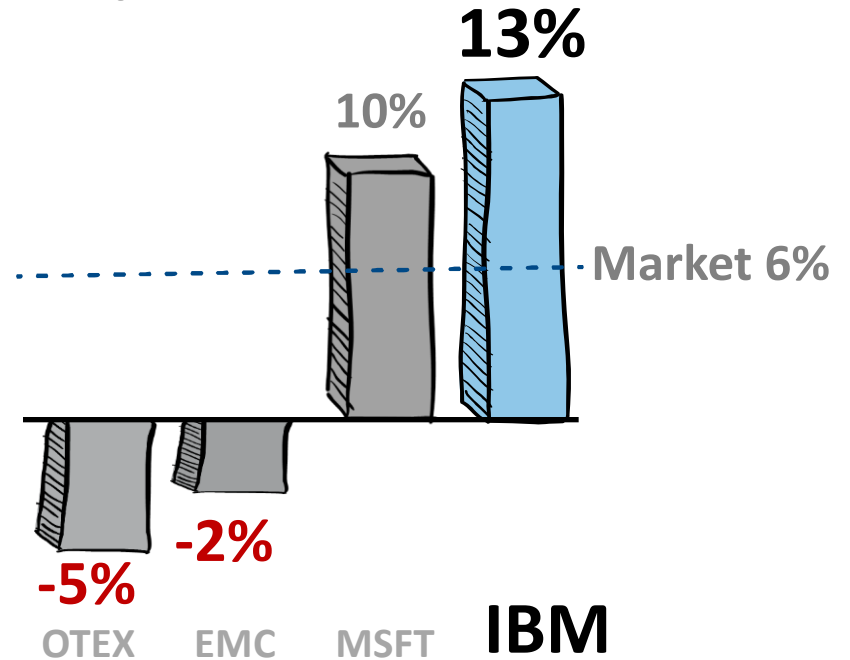
2012 Share

IDC



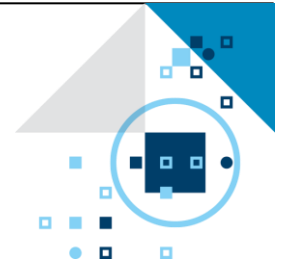
2012 Growth

IDC

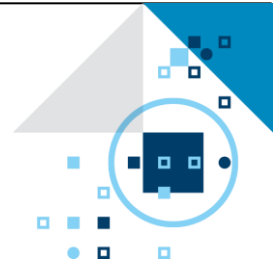


Source: IDC, Competitive Analysis, Worldwide Content Management 2012 Vendor Shares, June 2013, IDC #241605

Competitive Advantage



| | <u>Content Foundation</u> | <u>Microsoft SharePoint</u> | <u>Alfresco</u> | <u>Hyland</u> |
|---|---------------------------|-----------------------------|--|------------------|
| Pricing | Low | Low | Low | Low |
| Mobile client experience consistent with web & desktop | Y | N | N | N |
| Setup for CMIS search (content from other repositories) | Easy | Hard | Hard | Hard |
| Simple, extensive client customization using modern development tools (HTML5, CSS3) | Y | N | N | Y |
| Repositories include runtime DB, App Server, Directory Server | Y | N | N | N |
| Client support for secure exchange of large files | Y (Quickfile) | N | N | N |
| Supports mobile client customization | Y (Worklight) | N | N | N |
| Upsell to Case Foundation, Case Manager possible? | Y | N | N | N |
| Integration with Enterprise Report Management solution | Y | N | N | Y |
| Provides Social Content Management capabilities | Y | Not on-prem | N | N |
| Pricing simplicity / metrics | Simple | Complex | Simple | Complex |
| Requires 3rd-party storage devices | N | Y | Y | Y |
| OS Platform Support | Windows, Unix, Linux | Windows only | Windows, Unix, Linux, Ubuntu | Windows * Oracle |
| Database Support | DB2, MS-SQL, Oracle | MS-SQL only | MS-SQL, DB2, Oracle, MySQL, PostgreSQL | Windows * Oracle |
| Web App Server Support | WebSphere, Oracle, IIS | IIS only | WebSphere, Jboss, Oracle | IIS only |
| Built-in HSM storage mgmt | Y | N | Y | Y |
| Full API access | Y | Y | Y | N |



Thank
you

Collaborate... in Teams



My Documents replacement

Quarterly and annual business reviews

Events and conferences

Standard operating procedures

Contracts/ vendor management

...

The screenshot shows the IBM 'Nexus' Teamspace interface for the 'IOD Conference' workspace. The interface includes a navigation pane on the left with 'Browse' and 'Search' sections. The main area displays a table of files and folders. A 'Team' panel on the right lists team members with their profiles and contact information.

| Name | Modified By | Modified On |
|-----------------------|-------------|-------------------|
| Conference Materials | howarth | 4/24/2012 4:36 PM |
| Maps | howarth | 4/24/2012 4:36 PM |
| Photos | howarth | 4/24/2012 4:36 PM |
| Presentation Template | howarth | 4/24/2012 4:36 PM |
| Presentations | howarth | 4/24/2012 4:36 PM |
| Speakers | howarth | 4/24/2012 4:36 PM |

Team Members:

- Howarth, Richard (Rich)**
Director, ECM Software Development
IBM Software Group, Enterprise Content Management
800 S. LEBER, CO United States
1-303-924-7310
howarth@us.ibm.com
- Murphy, John**
Vice President, ECM Product Development
IBM Software Group, Enterprise Content Management
2050 FAIRVIEW, CA United States
1-714-327-5005
john@us.ibm.com
- O'Connor, Christopher**
Vice President Industry Solutions Software
IBM Software Group
DURHAM, NC United States
1-919-324-2000
chriscoc@us.ibm.com
- Morris, Dana**
Senior Manager, ECM Client Development
IBM Software Group, Enterprise Content Management
HERNDON, VA United States
1-703-843-1129
danorra@us.ibm.com



Teamspace



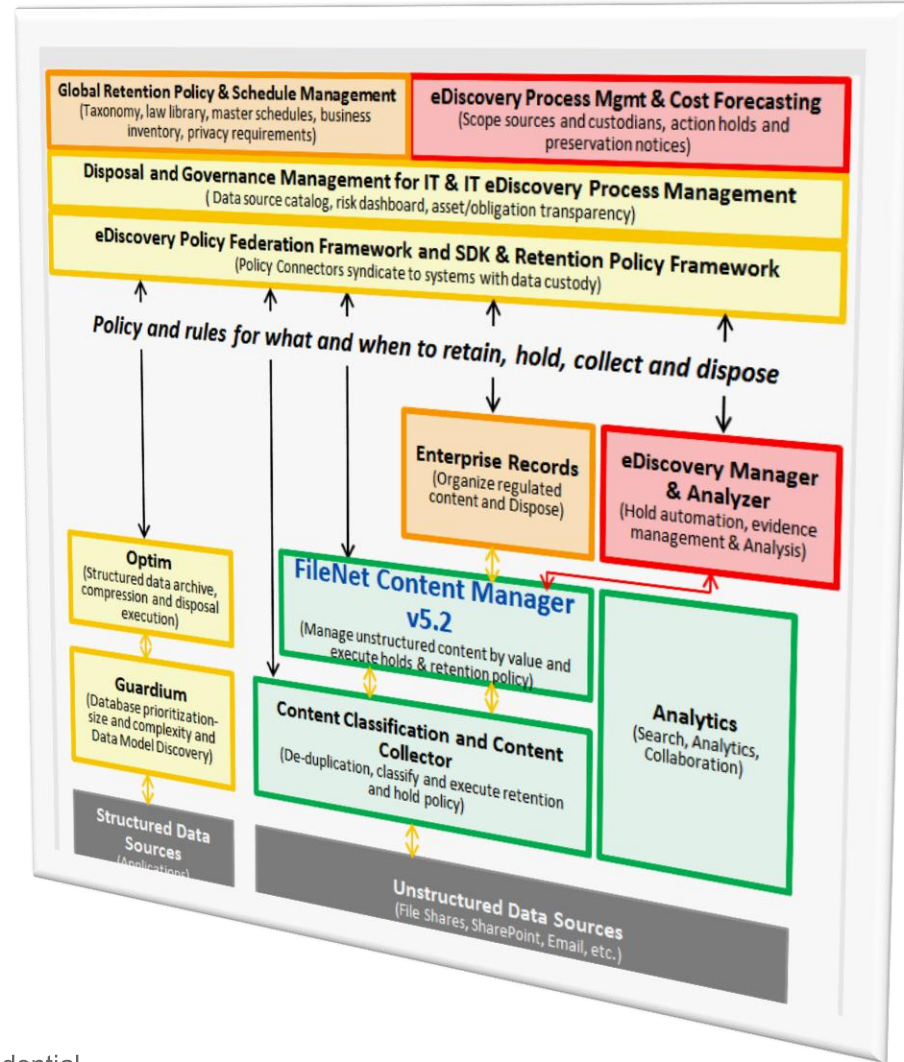
Document Retention Management and Holds



- FileNet Content Manager V5.2 is designed to accept hold and retention policies from the IBM Information Lifecycle Governance Policy Suite of products

Benefit

- Maximizing information value and aligning cost to value over time substantially improves information economics for all stakeholders



Create and use Cross repository searches



Focus Finance

+ New Search

Name contains

- Recent Searches
 - All General Documents
 - Document title search
 - Invoices by region
 - Contracts by Law Firm
 - Valuations by Company
 - Sales Invoices and Con
 - Contracts and Invoices
 - Contracts by Governing
- All Searches

All General Documents × **New Cross-Repository Search** ×

Search Scope

Add Repository **Edit Repository** **Remove**

| | Repository | Search Scope | Class | Object Type and Version |
|-----------|-----------------------------------|-------------------|---------------------------------|-----------------------------|
| PE | Focus Finance | Entire Repository | Contract (Including subclasses) | Documents, Released version |
| OD | Focus Corp Reports and Statements | InsurancePolPrint | Not applicable | Not applicable |
| CM | Focus Insurance | Entire Repository | Auto Claim Form | Documents, Current version |

Add Mapping **Edit** **Delete**

| Mapping Name | Type | Repositories |
|------------------|-------------|---|
| Added On | Date | Focus Finance, Focus Corp Reports and Statements, Focus Insurance |
| Agreement number | Text string | Focus Corp Reports and Statements, Focus Finance, Focus Insurance |
| Parties | Text string | Focus Finance, Focus Corp Reports and Statements, Focus Insurance |

Search

Cross Repository Searches – transparent to users

- Simple to use
 - Looks like a regular search
- Documents and folders
 - Details, magazine and filmstrip view
- Navigate inside folder in the search results
 - View, Add documents or subfolders
- Multiple-selection actions
 - Export results
 - Edit properties of items from the same repository

My First CRS x

Search Criteria: Property options: Match all Cross-repository search details

Added On: ? Less Than 8/13/2013

Added By: ? Equals

Title: ? Starts With

Search Reset Edit Results Display Keep search criteria open

Search Results

Run a search to see results.

Search Results

Refresh Add Document New Folder Check In Check Out Properties Actions

Showing results for: New Search

At least one repository returned more than 500 results. See the results analysis.

| | Title | Added On | |
|----------------------------------|----------------------------------|---------------------|--|
| emptydoc.txt | emptydoc.txt | 5/20/2012, 12:28 AM | |
| 8winter.jpg | 8winter.jpg | 5/22/2012, 3:57 PM | |
| test | test | 5/22/2012, 4:59 PM | |
| Carolyn name is longer now to te | Carolyn name is longer now to te | 5/24/2012, 11:56 AM | |
| aaa | aaa | 5/25/2012, 1:19 PM | |
| bbb | bbb | 5/25/2012, 1:19 PM | |
| CC1 | CC1 | 5/25/2012, 1:25 PM | |
| F111 | F111 | 5/25/2012, 1:26 PM | |

Properties Edit

Class: NOINDEX

Source: 8winter.jpg