IBM Content Manager OnDemand (CMOD)

Enterprise Content Management
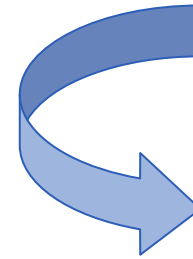
Louise Hawley

Agenda

- Introduction to Content Manager OnDemand (CMOD)

- New Announcement

- CMOD product demo

- Q&A

Understanding the Pains

Pains
&
Pressures!

Business Pressures

- Inability to access transactional content in easily-digested and shared forms that match user needs and skill sets

- Siloed information across the organization

- Reduced user productivity related to complex search requirements, and inaccessible or unindexed data

- Reduced customer satisfaction because of a lack of self-service capabilities and slower customer-service response times

- Higher content-management, printing and storage costs

- Compliance requirements across the enterprise
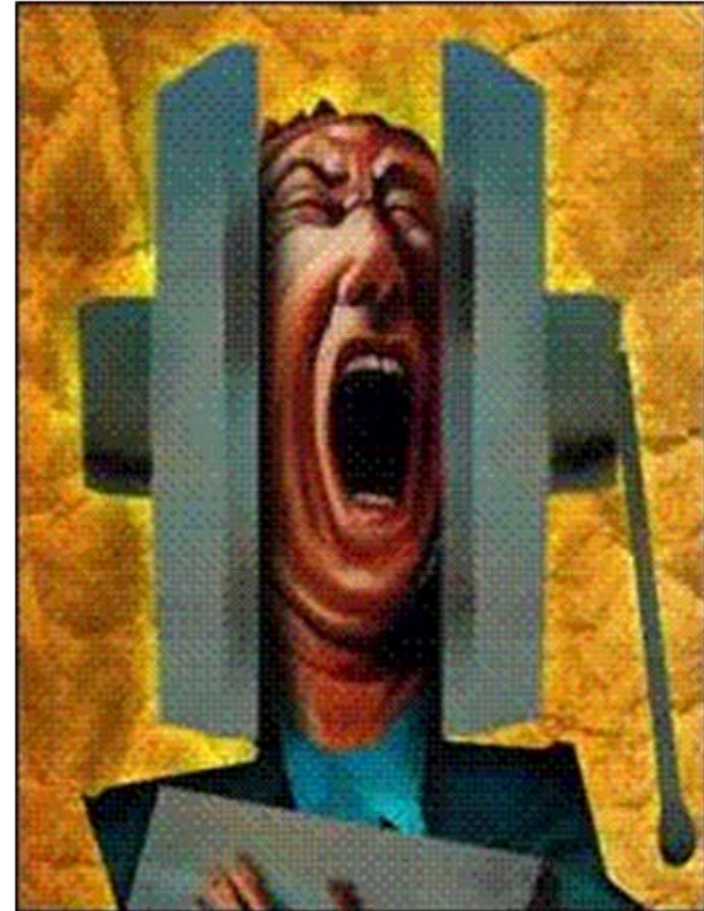
Common business problems

Market Presence – COLD/ERM

Gartner - Magic Quadrant report for Integrated Document Archive and Retrieval Systems, 2006

Figure 1. Magic Quadrant for Integrated Document Archive and Retrieval Systems, 2006
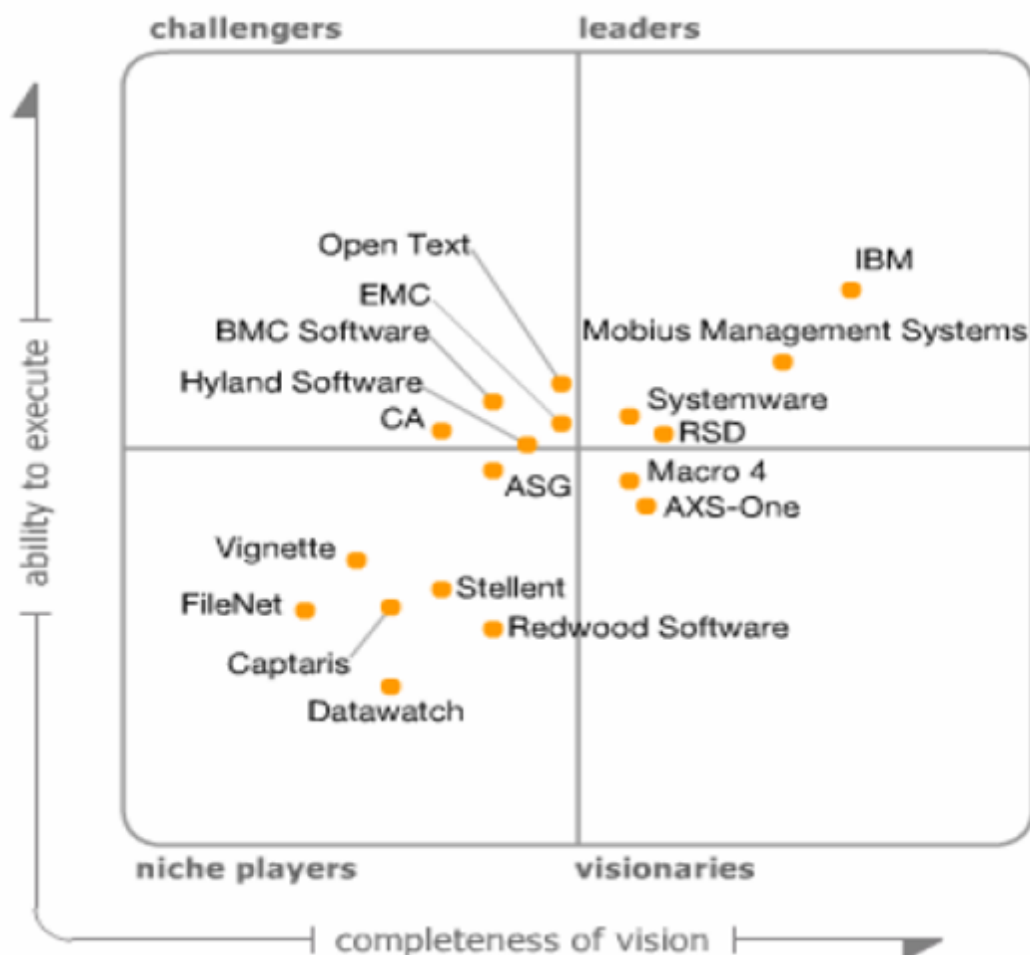
- *IBM maintains its leadership through its strong market presence, extensive ECM product lineup and partner channel.*

- *IBM has the complementary products to support the archiving requirements for enterprises ranging from SAP to e-mail archiving, as well as content management products, such as records management. Combined with Tivoli Storage Manager, DB2 Content Manager OnDemand also provides hierarchical storage management and support for a range of storage devices.*

Uses for Content Manager OnDemand

- e-Statement Presentment

  → Front office application

    ◆ Presenting of customer data in customer service environments
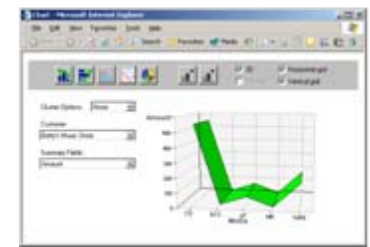
    ◆ Self Service or call centers

- e-Report Management

  → Back office application

    ◆ Managing of access to information contained in reports (which can be considered snapshots of a database in time)

    ◆ Delivery for analysis

However.., It's Not Just Report Management Anymore

- **Traditional use cases**

  - Microfiche Replacement

  - Report Distribution
    - Data extracted out of archive and delivered in paper or electronic form to end users
  - Electronic Bill Payment and Presentment
    - Using the internet to deliver statements
      - ✓ Able to offer additional services by adding additional advertising

- **Shifting purchasing behaviors**

  - Enterprise Report Management not being purchased as a standalone solution, but rather as a part of the overall Enterprise Content Management (ECM) decision

  - Need to leverage data in the repository

- **Emerging use cases**

  - Compliance

  - Transform into useful, insightful, and in-context information
    - Extraction and assembling/composing new documents
    - Report Mining
    - Analysis

CMOD Benefits

Capabilities	Value Proposition	Proof Points
• Scalable high volume capture of computer output	• Reduce overall costs of operation by managing and enabling access to all computer generated output	• Comes first in Gartner IDARS 2006 Magic Quadrant
• Timely customizable presentment	• Improve customer retention and reduce call center costs	• Scales to over 100 Million check images/day
• Automated archive with search and report mining	• Reduce paper in customer service and Account management	• 60 to 80 Million statements a month
• Automated storage management for cost and retrieval benefits	• Improve customer satisfaction by providing customers 24*7 access to online statements	• Permits mix and match of platforms
• Ability to store print stream in native format without transforming	• Reduce fines by adhering to compliance requirements	• Supports wide array of data types
• Ability to render in native character set		• Utilizes industry standard relational databases
		• Web Enabled

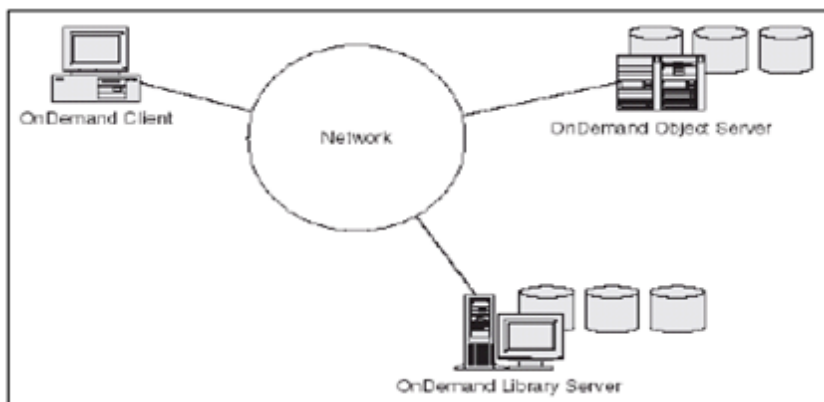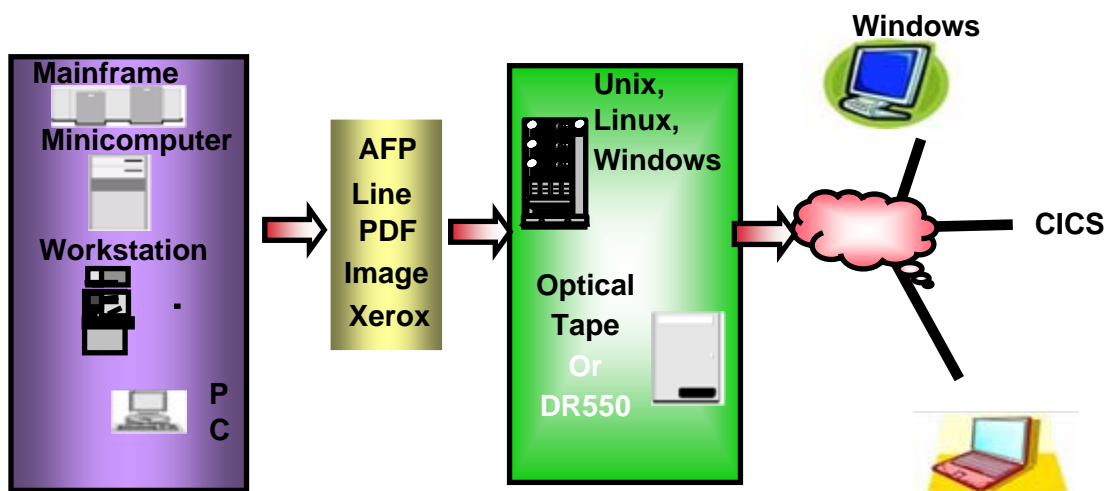# CMOD Sets New Benchmark

Over 100 Billion objects archived

Over 2 Billion retrievals every day

Over 10 Petabytes of data

OnDemand Architecture

Mainframe

Minicomputer

Workstation

P C

AFP
Line
PDF
Image
Xerox

Unix,
Linux,
Windows

Optical
Tape
Or
DR550

Windows

CICS

OnDemand Client

Network

OnDemand Object Server

OnDemand Library Server

Servers
Windows
Linux – RedHat, SuSE
UNIX - (AIX,HP and Sun)
Linux on zSeries
i5/OS
zSeries mainframe

Clients
IBM WEBI,
Win XP/WIN2K/WIN2003 GUIs
CICS/3270
CGI, Servlets, Java, DDE
and OLE API's

Databases
DB2, Oracle, Microsoft SQL
Server

CMOD Library and Object Servers
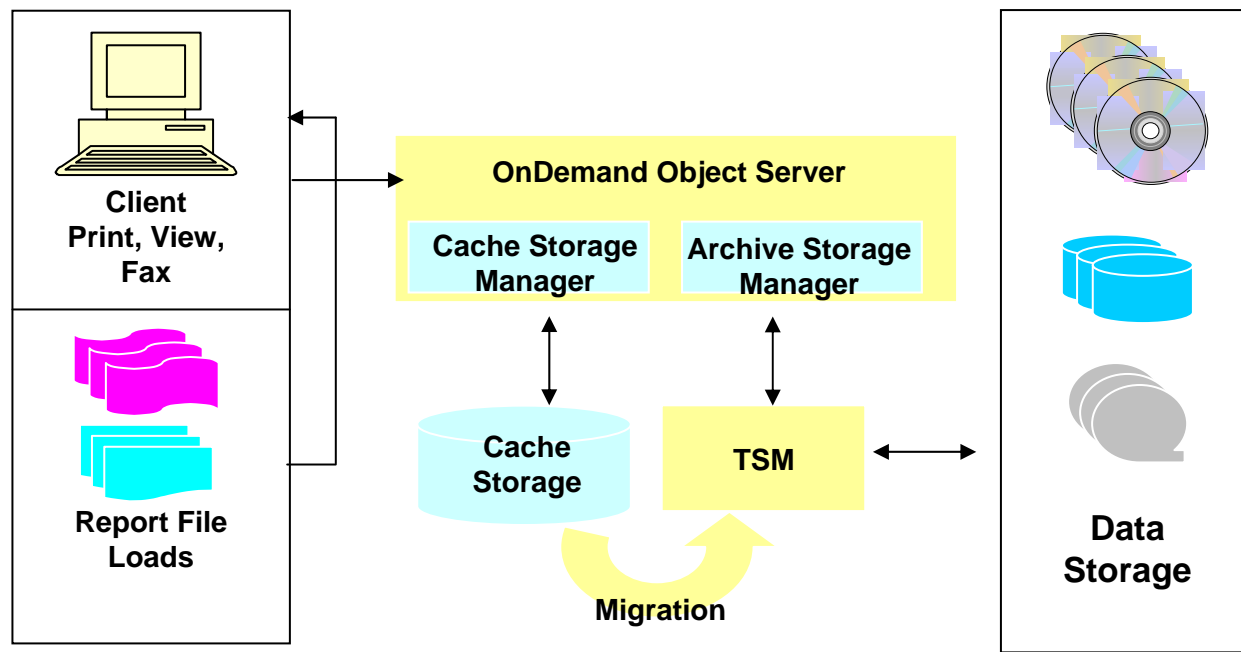
Library Server

- Contains DB2, Oracle, or SQL Server database

- Contains all index, configuration, and user account information

- Performs all database searches

- Performs user authentication and logging

- Provides a single system image across multiple object servers
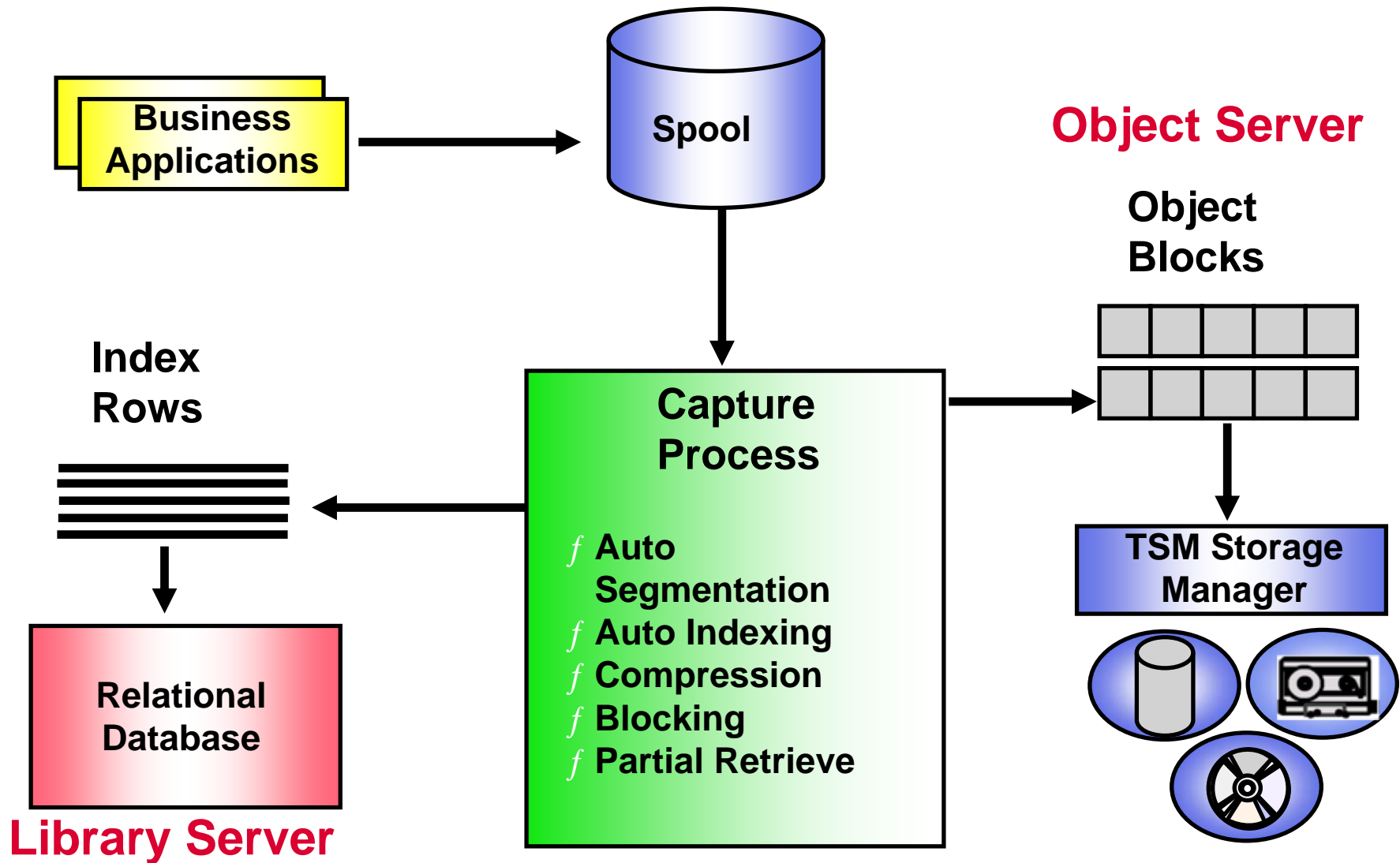
Object Server

- Could have a **mixture** of magnetic cache and a storage manager for handling optical, tape or magnetic

- Loading of data happens **directly** on object server

- Could be **local** or **remote**

- Are **transparent** to users

- Document retrievals comes **directly** from object server

OnDemand Storage Management

- Allows **mixture** of magnetic, RAID, optical and tape

- Automatic **migration** and **expiration** of documents based on report type

OnDemand Object Server

Client Print, View, Fax

Report File Loads

Cache Storage Manager

Archive Storage Manager

Cache Storage

TSM

Migration

Data Storage

OnDemand Document Capture

Business Applications

Spool

Object Server

Object Blocks

Index Rows

Capture Process

ƒ **Auto Segmentation**
ƒ **Auto Indexing**
ƒ **Compression**
ƒ **Blocking**
ƒ **Partial Retrieve**

TSM Storage Manager

Relational Database
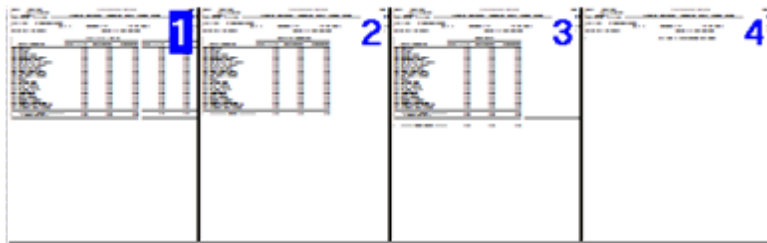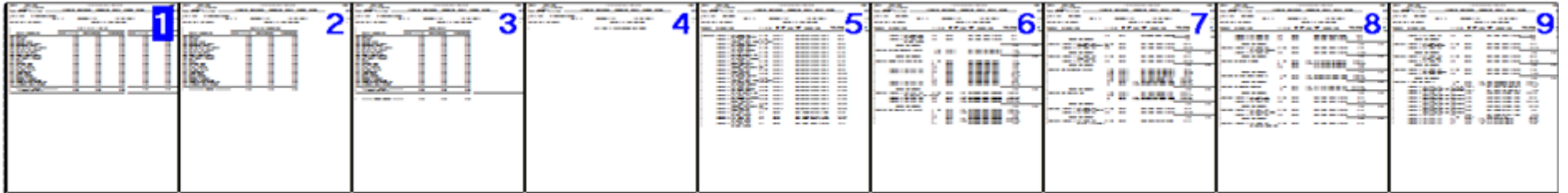
Library Server
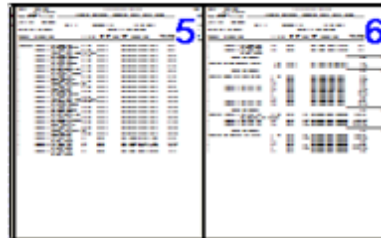
OnDemand Compression

- Storage management structure

→ Compresses data (2:1 to 30:1) before storing it

→ Scalable solution

→ Supports office/departmental environments through high-end production environments
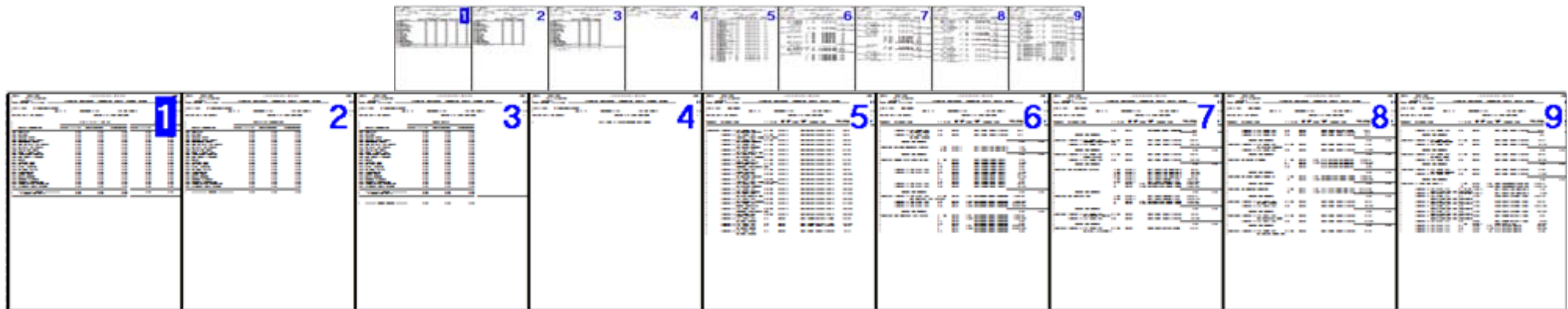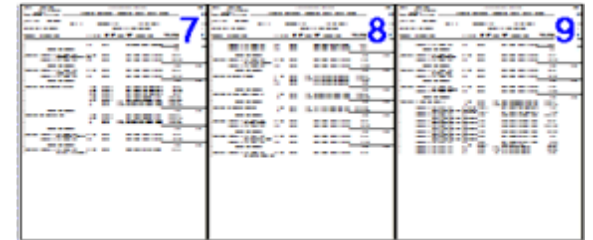
SEGMENTATION COMPRESSION INDEXING
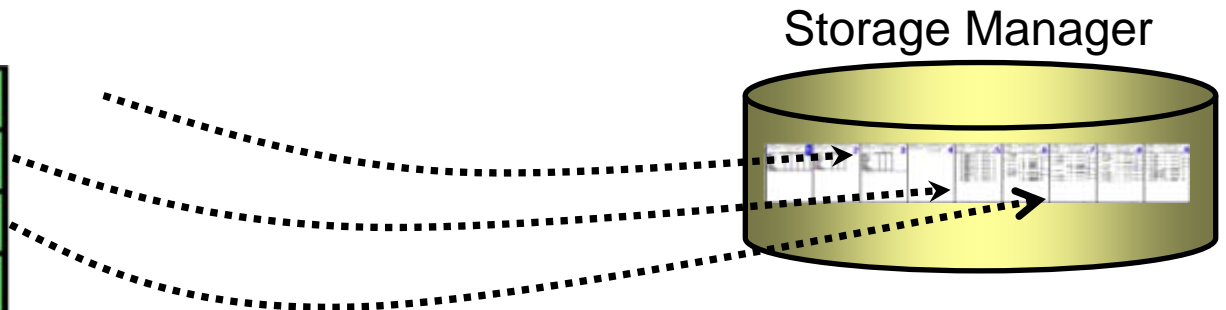

John Smith
123-11-2001

Ron Smith
523-22-6678

William Smith
709-03-4332

Storage Manager

John Smith	123-11-2001
Ron Smith	523-22-6678
William Smith	709-03-4332

Content Manager OnDemand v8.4.1

- Themes

  → Enhanced retention management

  → Integration with IBM FileNet P8 – Business Process Manager(BPM), Content Manager and Records Manager

  → Other functional and performance enhancements

Enhanced Retention Management

- Enhanced Retention Management is built directly into CMOD

  → Includes the ability to suspend (lockdown) individual documents within a report

- Enable/Disable ERM

- Implied Hold

- Load expiration type

- Lockdown field

PDF Enhancements

- Improved ingestion performance and storage with CMOD PDF indexer

  → PDF resources stored separately

  → 30% - 50% improvement in ingestion performance

    ♦ Overall performance improvements

    ♦ Resource collection

    ♦ Removed unused resourcesNew parameter RESTYPE in the Application Indexing parameters controls resource collection

Integration with IBM Filenet P8

- Integration with IBM P8

  → Unified search and view CMOD content and IBM P8 content

  → Leverage CMOD content in IBM FileNet BPM applications

  → Manage CMOD Content as records in IBM FileNet Records Manager

Integration with IBM FileNet P8

- Content Manager OnDemand will leverage IBM FileNet P8 through IBM Content Integrator

  → CMOD document metadata is 'federated' into P8 database

    - Unidirectional
    - CMOD physical data remains in place

  → Once in P8, able to leverage P8 clients (like Workplace XT) in order to have

    - Unified search
    - Leverage Business Process Management (BPM)
    - Records Management

Content Manager OnDemand and BPM

- Leverage CMOD content in BPM applications

  → Auto-trigger business processes

  → Attach CMOD document to a business process

  → Modeling, Tracking, Simulation, BAM and more

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focus
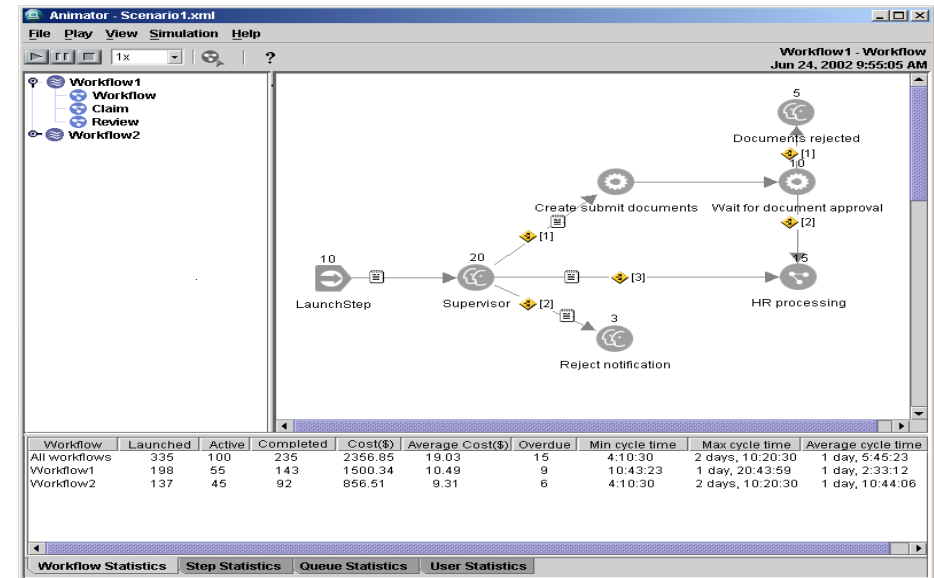
| Case | Attachments | Audit |

Case Information

Case Number 156933

Last Name Smith

Assistance Amount 1,500.00

Received Date 11/19/2007

Additional Informaton

Address 899 Main St.

City Glastonbury

Zip Code 06033

SSN 222-11-3333

▷ **Other Fields**

Case Number

Received Date

Inbaskets

Review (0)

My Work (3)

Case Review (4)

Documents attached: 4

Application Received Email   Grant Deed   SSN Card   Utility Bill

SMITH, JOHN R.
1234 ANY ST. N.
GLASTONBURY, CT 06033

i   A   Page 1 of 1...

start   Address   Go   95%   4:45 PM   Wednesday   5/14/2008

Compliance requirements

- Customer requirements to manage CMOD content as records

- This means:

  → Declaration and Classification of content against an organizational file plan—ZeroClick or manual

  → Preservation of content, structure, and context

  → Event-driven disposition in accordance with an organization's policies

  → Security to control access and prevent content changes

  → Application of Legal Holds to ensure preservation and compliance with Legal Discovery requests

  → Auditing and Monitoring to ensure compliance with the organization's RM policies

OnDemand 8.5 Announced 09/08/2001

Client & Admin Enhancements

- PDF Text Search PDF docs - without the need for Adobe Acrobat

  → Reduces licensing costs

- Hyperlinks in server custom messages

  → Example; to change password go to http://w3.ibm.com/password)

- Auto detect subsystem failures

  → Example; unexpected database shutdown

- Trace - performance and manageability enhancements

  → Normalized output can be view from any platform

Improves usability and flexibility
Reduces costs - no longer require Adobe Acrobat

7.5 percent of all documents get lost, 3 percent of the remainder get misfiled. Source: PWC

Unload from System Load Facility or System Log

- Simplifies unloading an OD Load from the System Load Facility or Log

  → Select an item from the list &
    'right click' to unload

  → Correct permissions
    necessary

  → Win32 Client
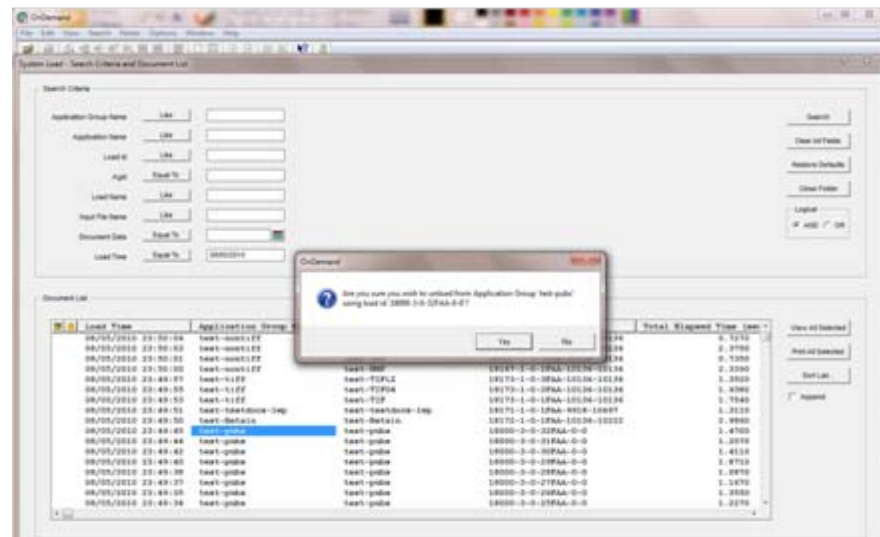
Usability and manageability benefits
Eliminates manual command line steps
No need to remember long Load IDs
.

Print Line Count

- Adjust print line count for line data documents to improve legibility

- Before

```
11/01/99          CLASSICAL MUSIC DISTRIBUTORS              PAGE 01
10:                11/01/99      CLASSICAL MUSIC DISTRIBUTORS          PAGE 01
MS                 10:17              MONTHLY SHIPPING REPORT
    11/01/99           CLASSICAL MUSIC DISTRIBUTORS              PAGE 01
CUS 10:17                 MONTHLY SHIPPING REPORT
    CMSR94                 FROM 10/01/99 TO 10/31/99


    CUSTOMER: Betty's Music Store
               Muscatine Plaza
AC             200 Lower Muscatine
CO             Cedar Falls, IA 50613
    C
ME  ACCOUNT NUMBER: 11887
M   CONTACT: Betty Yoder
CD

    MEDIA QTY  DESCRIPTION                        LABEL/NO.   UNT_PRC   AMOUNT
CM               ORDER NUMBER:   536017    SHIP DATE: 10/06/99
    CD    4   Bartok, Sonata for Solo Violin     MK-42625      8.99    35.96
TA  T     7   Mozart, Mass in C, K.427           420831-2      9.00    63.00
    C     2   Luening, Electronic Music          CD 611       10.19    20.38
CD  TAPE  9   Scarlatti, Stabat Mater            SBT 48282     5.99    53.91
    C
                 ORDER NUMBER:   536039    SHIP DATE: 10/21/99
    CD   11   Beethoven, Pathetique Sonata, Arau 420153-2      5.99    65.89
LP        8   Mendelssohn, War March of the Priests SMK 47592  8.99   71.92
    L    10   Pizzetti, Messa di Requiem         CHAN 8964     9.59    95.90
TA
T   LP    6   Misc., Modern Trombone Masterpieces ADA 581087  10.79   64.74

    TAPE  6   Gershwin, An American in Paris     ACS 8034      5.99    35.94
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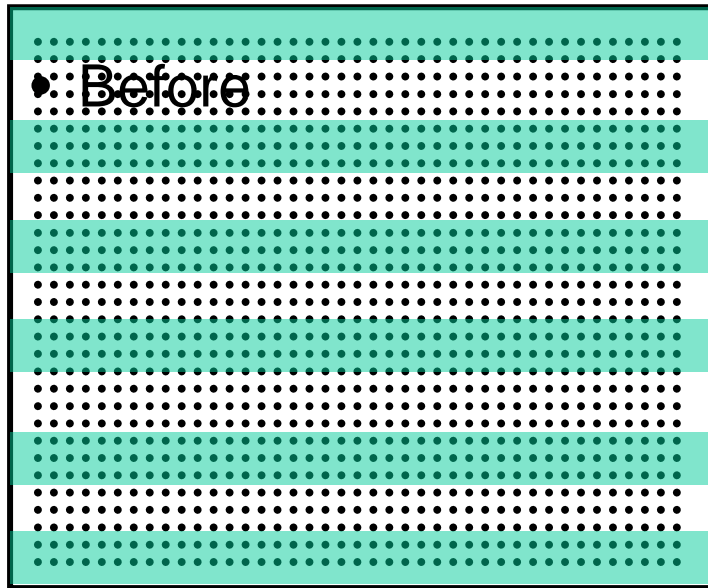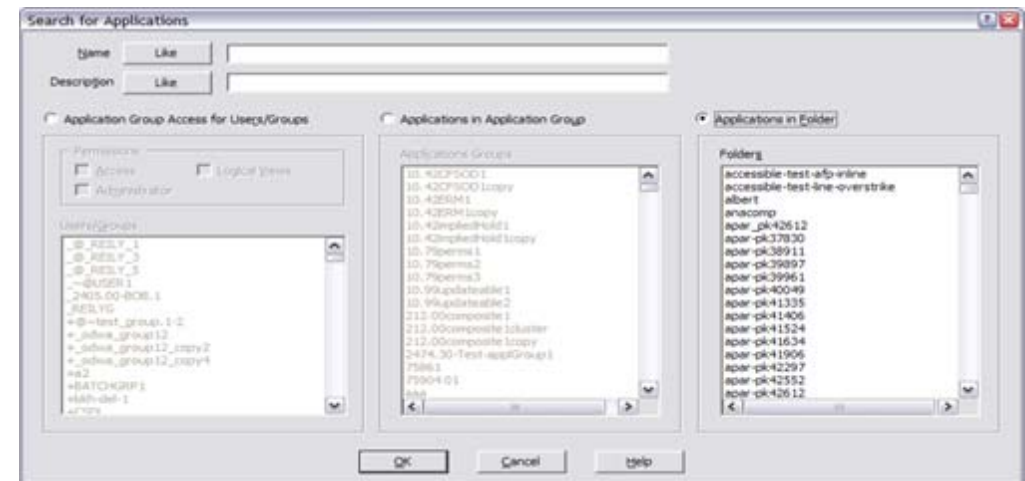
Improves manageability of documents

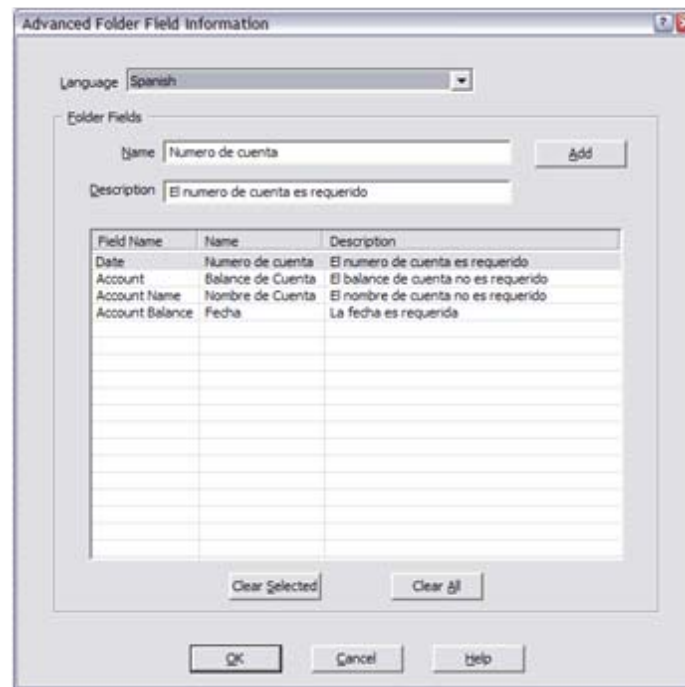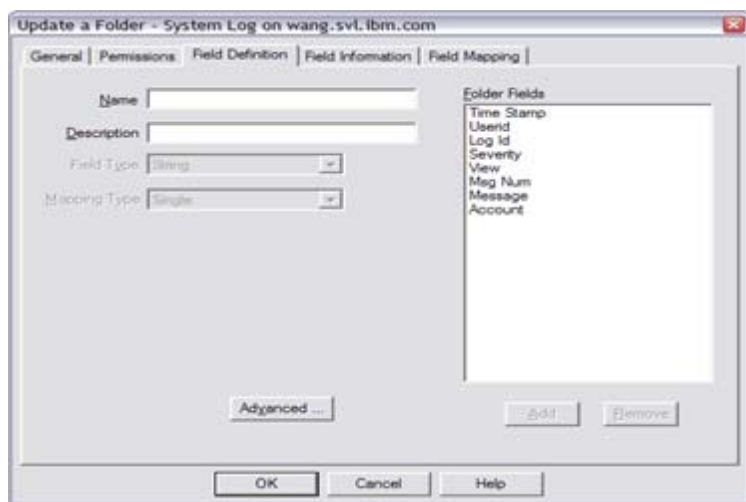$75 is spent on labor to process a document. Source: PWC

Folder Admin

- Create a list of applications that are included in a specific folder

- Create a list of application groups that are included in a specific folder

- Create a list of folders that include a specific application

Increases Administrator productivity

Folders – Multiple Languages

- Multiple language folder field names for Win32 client

For customers serving multiple language user communities

Nearly 180 million trees were consumed in 2008 for the 1.5 trillion pages used on hardcopy devices Source: IDC

Other Enhancements

- SSL and LDAP

- FIPS 140-2

- PDF Indexer

- Transforms

- Additional Updates

Increased Security, Usability, Performance, Portability and Manageability

$120 the cost of searching for a mis-filed document. Source: Inc. Magazine

Summary

- **OnDemand provides:**

- Ability to manage and enable access to all computer generated output such as bills, invoices, statements, and reports across all business units reducing the overall cost of operations

- The ability to satisfy customer inquiries on first call eliminating unnecessary call backs and their associated costs

- Reduction of paper and its associated costs within the key business areas of customer service and account management

- Providing customers with 24x7 online access to their consolidated statements and account information results in better customer satisfaction, improves customer retention and reduces call center costs

- Provides option for customized and personalized statements, confirms and mailings

- Adherence to compliance requirements reduces possible fines

Thank You!
Q&A