

IBM Content Manager OnDemand (CMOD)

Enterprise Content Management

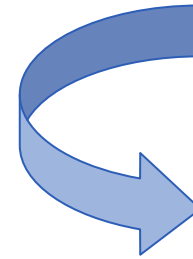
Louise Hawley

Agenda

- Introduction to Content Manager OnDemand (CMOD)
- New Announcement
- CMOD product demo
- Q&A



Understanding the Pains



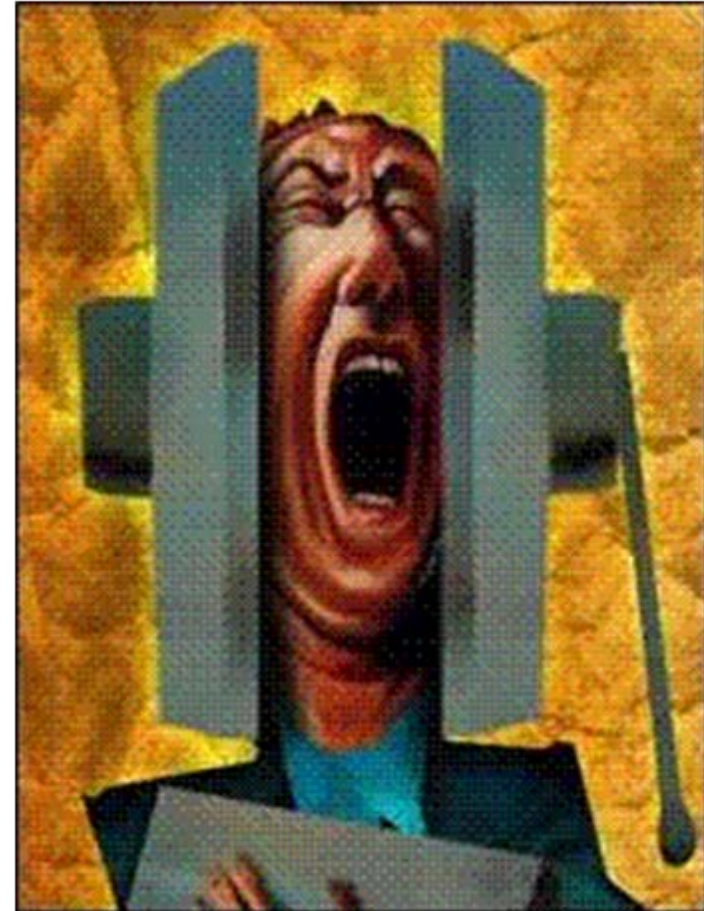
Pains

&

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



State erased public records

They were deleted after the Register sought e-mails about the search for a new development director.

By CLARK KAUFFMAN
REGISTER STAFF WRITER

Copyright 2005, Des Moines Register and Tribune Company

E-mail records of Gov. Tom Vilsack's staff were destroyed after The Des Moines Register requested access to the files in February, a lawyer for the governor said Friday.

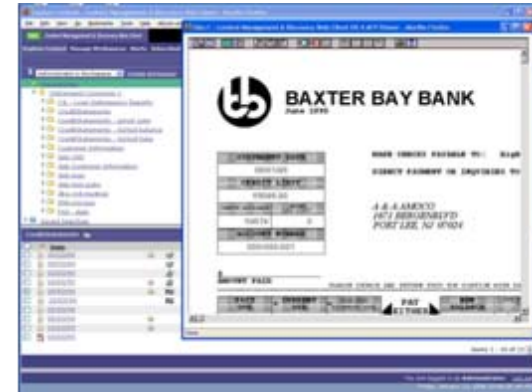
The records were destroyed despite numerous written and spoken requests made under the Iowa Open Records Law while the documents still existed. The governor's

Uses for Content Manager OnDemand

- e-Statement Presentment

- Front office application

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



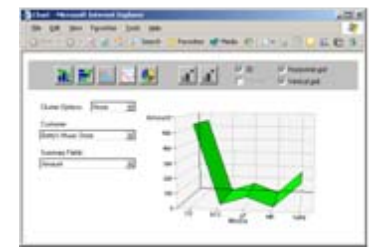
- e-Report Management

- Back office application

- Managing of access to information contained in reports (which can be considered snapshots of a database in time)
- Delivery for analysis



ORDER DATE	ORDER NUMBER	ORDER TYPE	ORDER STATUS	ORDER DATE	ORDER DATE	ORDER DATE	ORDER DATE
01/01/01	000001	000001	000001	000001	000001	000001	000001
01/01/01	000002	000002	000002	000002	000002	000002	000002
01/01/01	000003	000003	000003	000003	000003	000003	000003
01/01/01	000004	000004	000004	000004	000004	000004	000004
01/01/01	000005	000005	000005	000005	000005	000005	000005



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

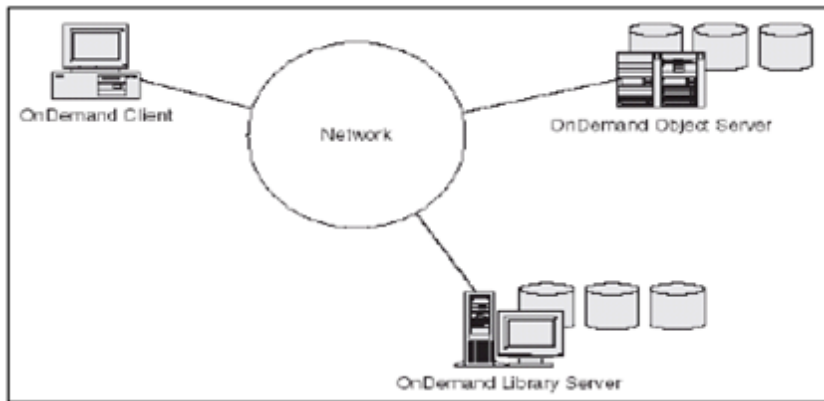
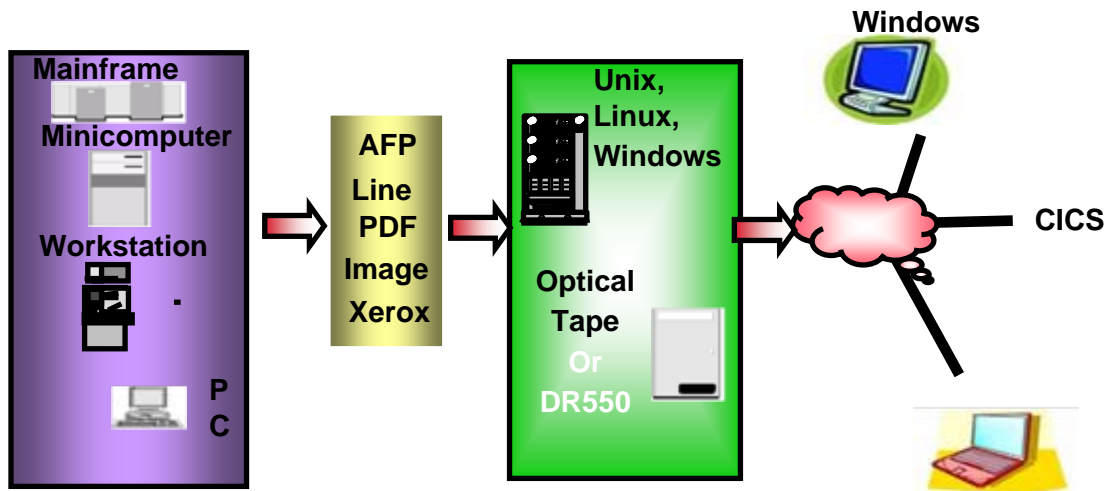
CMOD Sets New Benchmark

Over 100 Billion objects archived

Over 2 Billion retrievals every day

Over 10 Petabytes of data

OnDemand Architecture



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

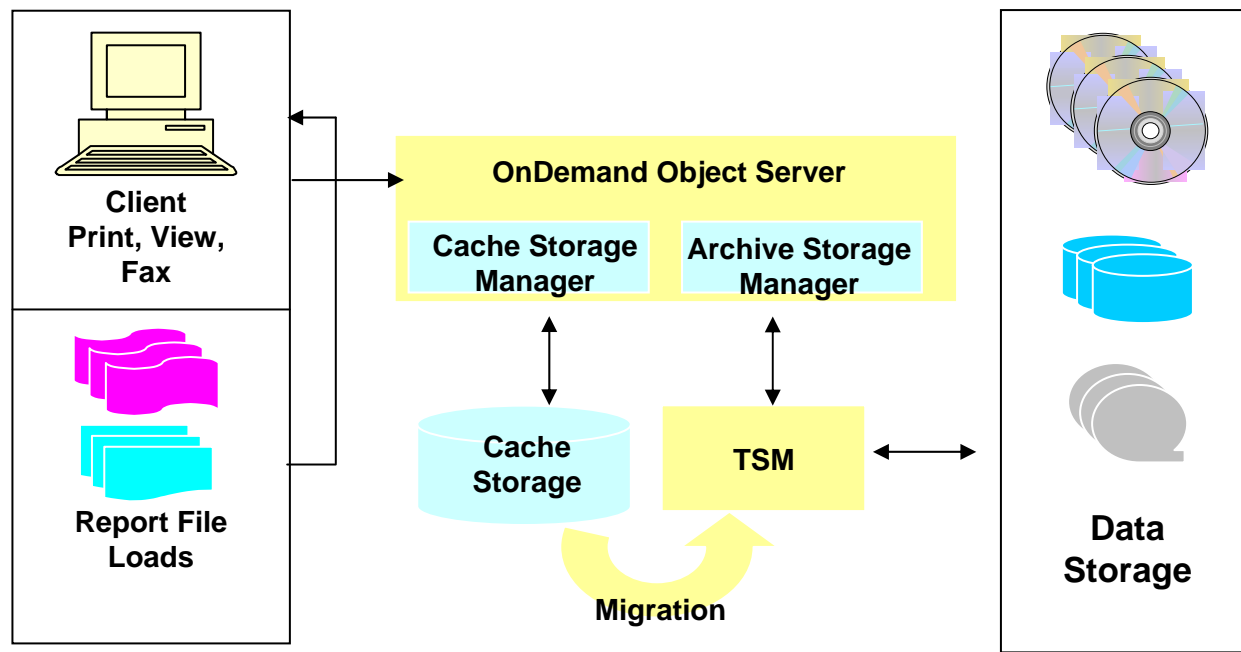
- Contains DB2, Oracle, or SQL Server database
- Contains all index, configuration, and user account information
- Performs all database searches
- Performs user authentication and logging
- Provides a single system image across multiple object servers

Object Server

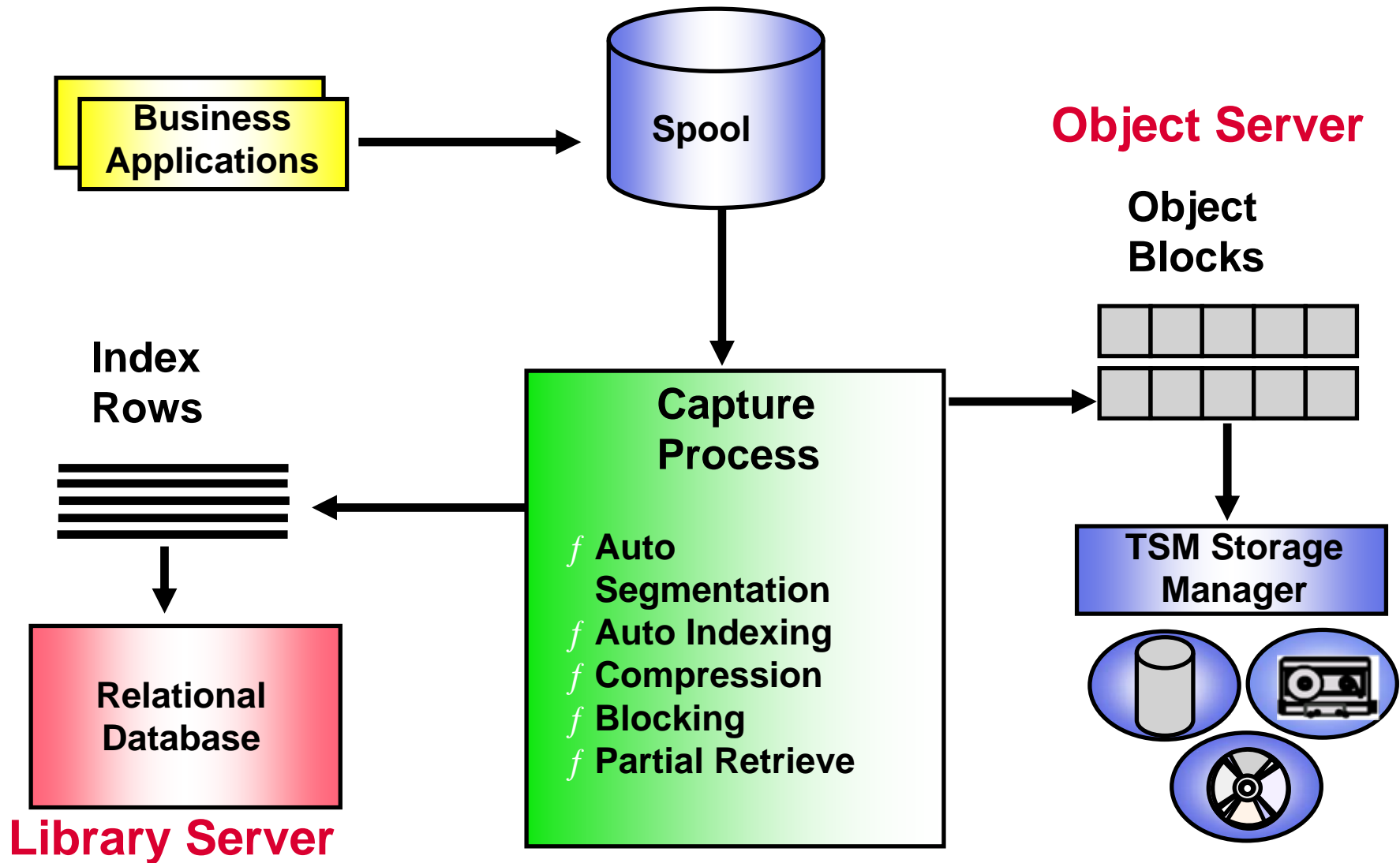
- Could have a **mixture** of magnetic cache and a storage manager for handling optical, tape or magnetic
- Loading of data happens **directly** on object server
- Could be **local** or **remote**
- Are **transparent** to users
- Document retrievals comes **directly** from object server

OnDemand Storage Management

- Allows **mixture** of magnetic, RAID, optical and tape
- Automatic **migration** and **expiration** of documents based on report type

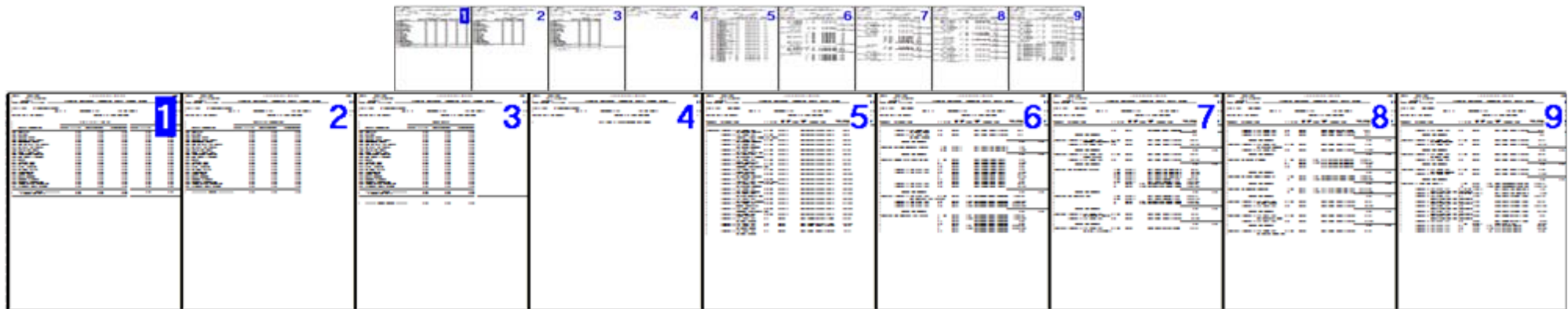


OnDemand Document Capture

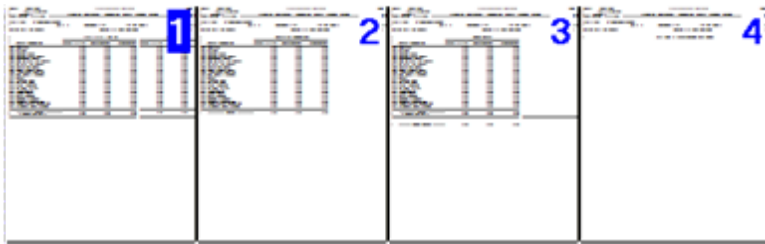
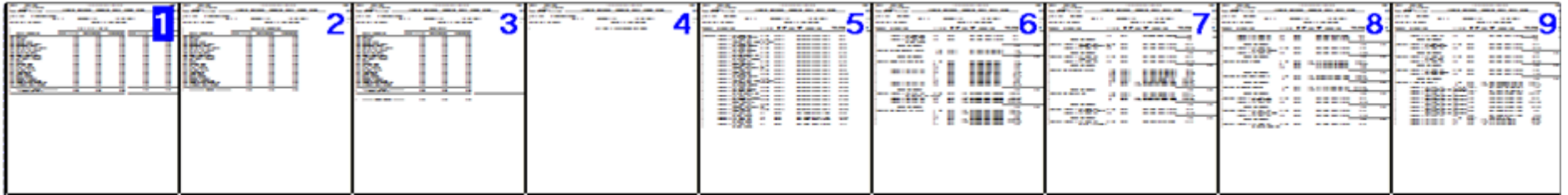


OnDemand Compression

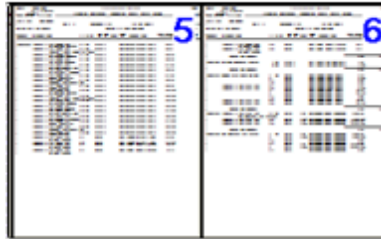
- Storage management structure
 - Compresses data (2:1 to 30:1) before storing it
 - Scalable solution
 - Supports office/departmental environments through high-end production environments



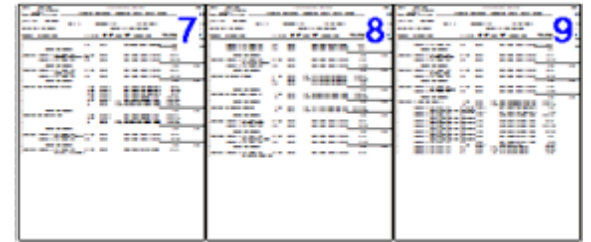
SEGMENTATION COMPRESSION INDEXING



John Smith
123-11-2001

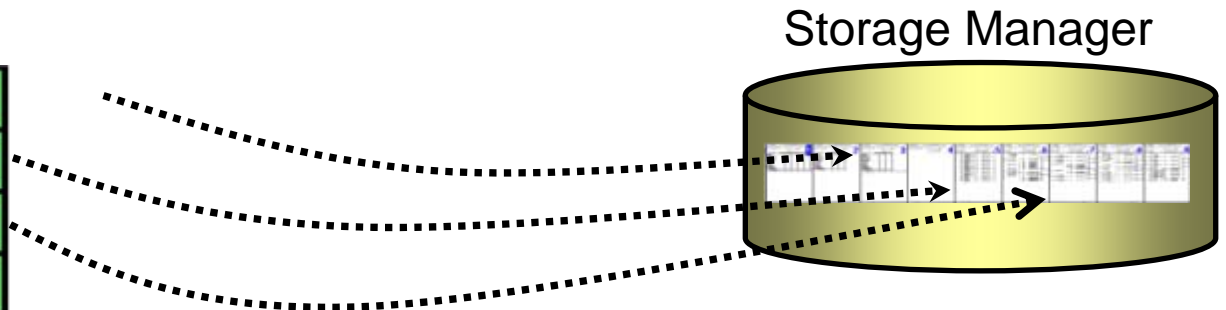


Ron Smith
523-22-6678



William Smith
709-03-4332

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

The screenshot shows the 'Database Information' dialog box with the following settings:

- Database Organization:**
 - Maximum Rows: 10000000
 - Multiple loads per database table
 - Single load per database table
 - Create Tablespace Type:
 - SMS
 - None
- Annotation:**
 - Annotation flags in document database table?
 - Yes
 - No
- Enhanced Retention Management:**
 - Application group uses Enhanced Retention Management?
 - Yes
 - Implied hold
 - No
- Interoperate with FileNet P8 Platform:**
 - Use Content Federation Services (CFS-OD)?
 - Yes
 - Federate documents automatically
 - Enable FileNet Records Manager to records declare automatically
 - No
 - Query using parameter markers

Buttons: OK, Cancel, Help

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 resources
- New 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

BAXTER BAY BANK
Online banking 24 hours a day.

STATEMENT DATE: 10/20/05
CREDIT LIMIT: 8000.00
TREET AVENUE: 7722
ACCOUNT NUMBER: 000-000-152

MAKE CHECKS PAYABLE TO: Big Bucks Card
DIRECT PAYMENT OR INQUIRIES TO: Big Bucks Card Center
CUSTOMER SERVICES
P.O. BOX 198708, DENVER, CO 80219
PHONE: (303) 333-6644

A & T PIANO CO
79 S MAIN
LODI, NJ 07644

AMOUNT PAID: PLEASE DETACH AND RETURN THIS TOP PORTION WITH PAYMENT

PAST DUE	CURRENT DUE	MINIMUM PAYMENT DUE	NEW BALANCE	MINIMUM PAYMENT DUE	MINIMUM PAYMENT DUE DATE
25	27.79	27.79	277.86	290.82	11/20/05

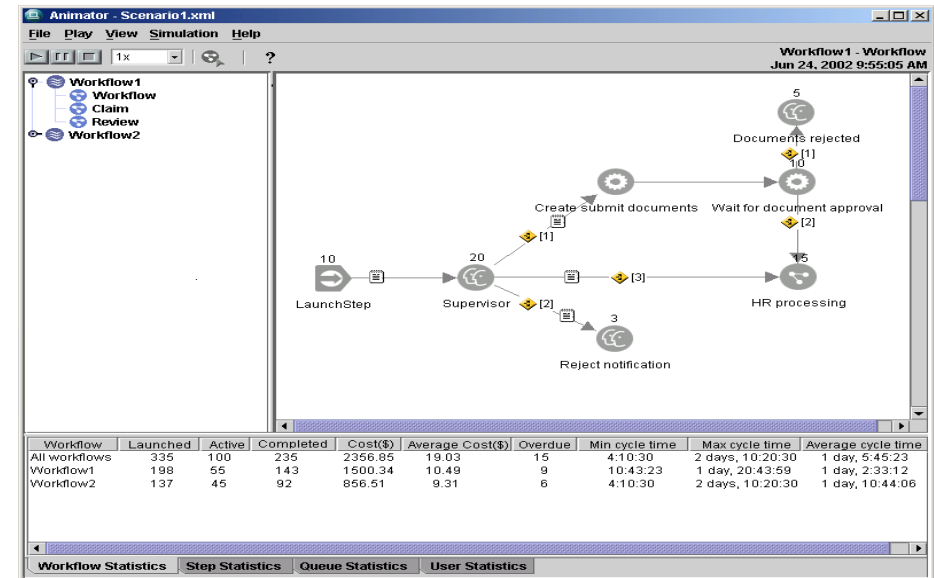
STATEMENT DATE: 10/20/05
ACCOUNT NUMBER: 000-000-152
ANNUAL PERCENTAGE RATE: 21.00 %

PREVIOUS BALANCE	- PAYMENTS	- CREDITS	+ PROMISES	+ CHG. AMT.	NEW BALANCE
5111.84	2048.82	0	277.86	0	277.86

The bottom screenshot shows a software interface with a green header and a table of financial data, including columns for 'CLASS', 'AMOUNT', and 'DATE'.

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





Case Attachments Audit

Case Information

Case Number

Last Name

Assistance Amount

Received Date

Additional Informaton

Address

City

Zip Code

SSN

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**

UTILITY BILL

1234 ANY ST N

ACCOUNT NUMBER	CYCLE	BILL DATE	DUE DATE
123456-789012	12/05/07	12/10/07	12/26/07

SMITH, JOHN R. 234
1234 ANY ST. N.
GLASTONBURY, CT 06033

ACCOUNT NUMBER	CYCLE	BILL DATE	DUE DATE	Last Bill Amount
123456-789012	05-01	1/10/07	1/16/07	72.84






NA	DESCRIPTION	AMOUNT	CURRENT	PREVIOUS	CHARGE
NA	BASE CHARGE - WATER	2.00	2.00	2.00	2.00
NA	CONSUMPTION	15.55	15.55	15.55	15.55
NA	TOTAL WATER	17.55	17.55	17.55	17.55
SS	BASE CHARGE - SEWER	5.00	5.00	5.00	5.00
SS	TOTAL SEWER	5.00	5.00	5.00	5.00
CR	CONTAINER FEE/2PKET	16.35	16.35	16.35	16.35
SW	STORMWATER HOURLY FEE	7.00	7.00	7.00	7.00
UT	UTILITY TAX - WATER	1.85	1.85	1.85	1.85
Total Current Charges		70.16	70.16	70.16	70.16
Balance Forward		0.00	0.00	0.00	0.00
Total Amount Due		70.16	70.16	70.16	70.16
Deposit on Account		339.00	339.00	339.00	339.00

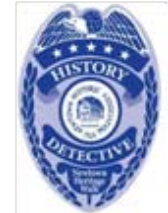
Page 1 of 1...

Content Manager OnDemand 8.5



CMOD v8.5 - Strategy

- Security 
- Usability 
- Performance 
- Portability 
- Manageability 



CMOD - Client & Admin Enhancements

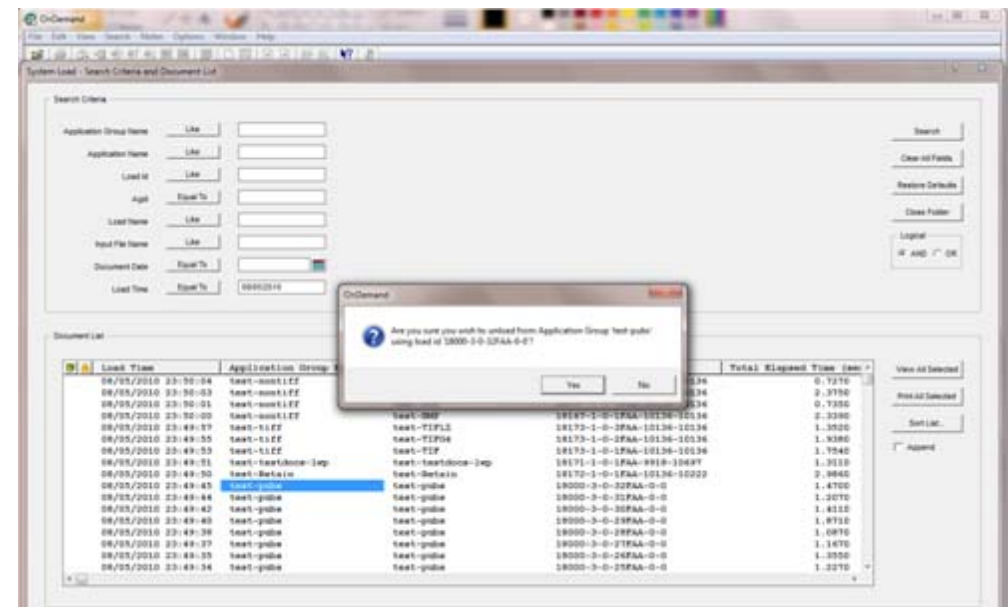
- PDF Text Search PDF docs - without the need for Adobe Acrobat
- Server custom messages can include hyperlinks which can be clicked on
 - (ie. To change password go to <http://w3.ibm.com/password>)
- Auto detect subsystem failures (i.e. DB2) and then close down appropriately
- Trace – performance and manageability enhancements
- Following slides will cover:
 - Unload
 - Print Line Count
 - Folder enhancements
 - DECFLOAT



Expands client capabilities, improves usability and flexibility
Reduces costs - no longer require Adobe Acrobat licenses \$300 – \$500/seat

Unload from System Load Facility or System Log

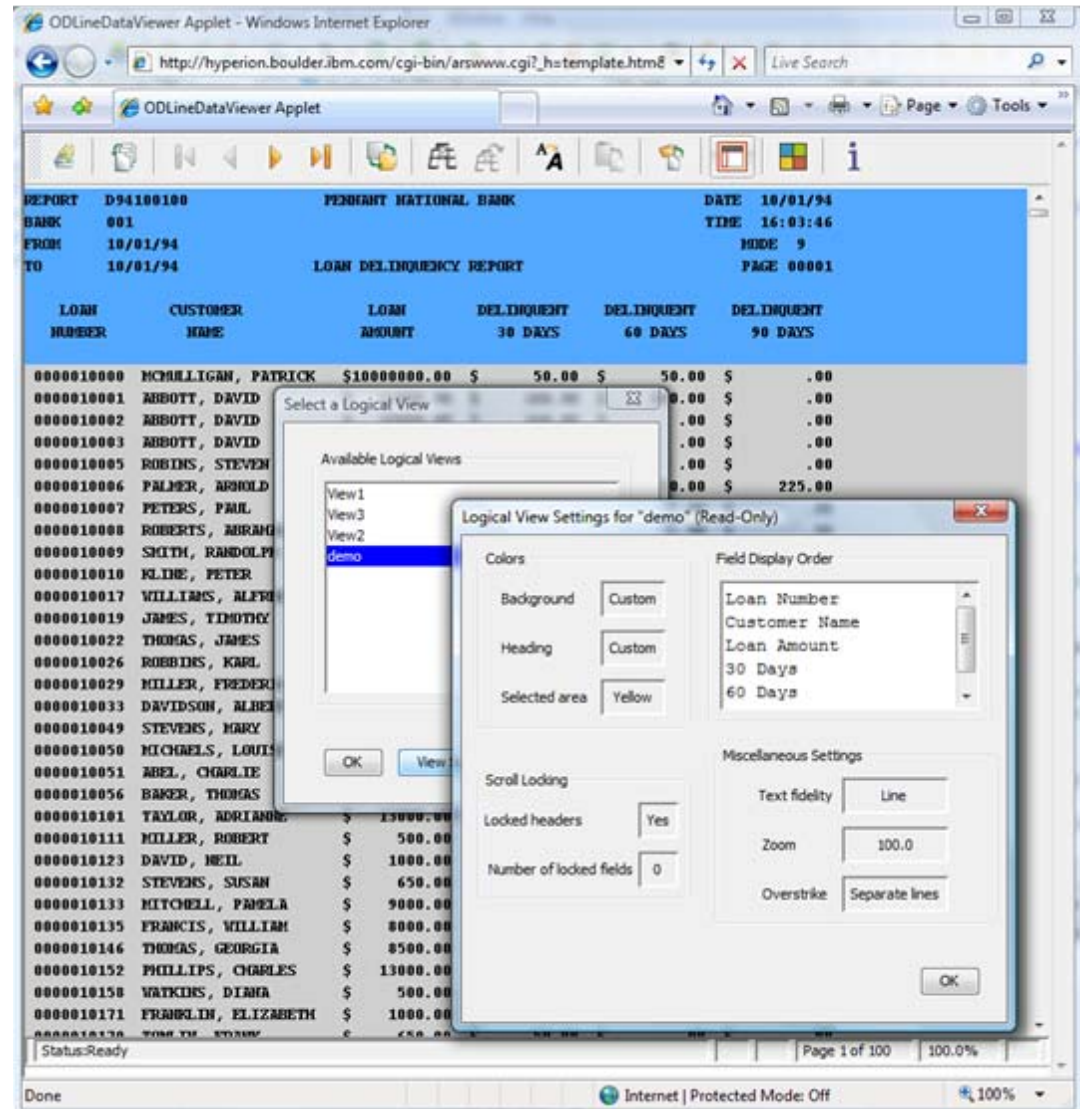
- Greatly simplifies unloading an OD Load from the System Load Facility
 - System Load Facility added in 8.4.1
 - Select an item that was loaded from the list and Right click to unload
 - Correct permissions necessary
 - Win32 Client



Eliminates manual command line steps and the need to remember long Load IDs. Huge usability and manageability benefits.

ODWEK

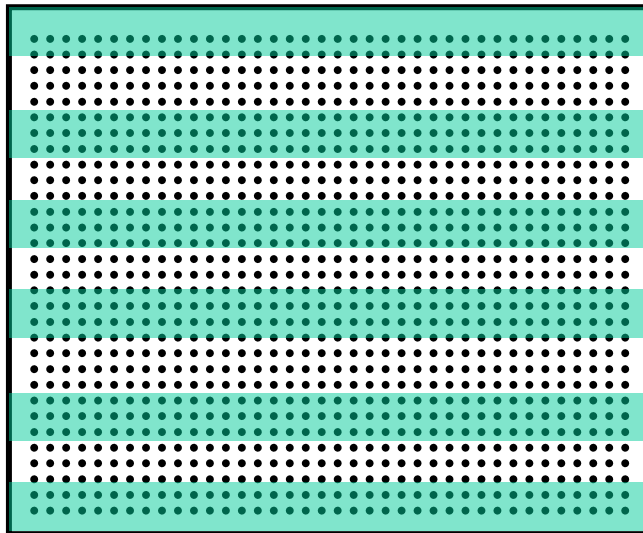
- Java Line Data Viewer Enhancements
 - Logical view support
 - More printer control options
 - Support for Print Line Count
 - New color picker
 - Many user experience improvements



Print Line Count

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

- Before



- After

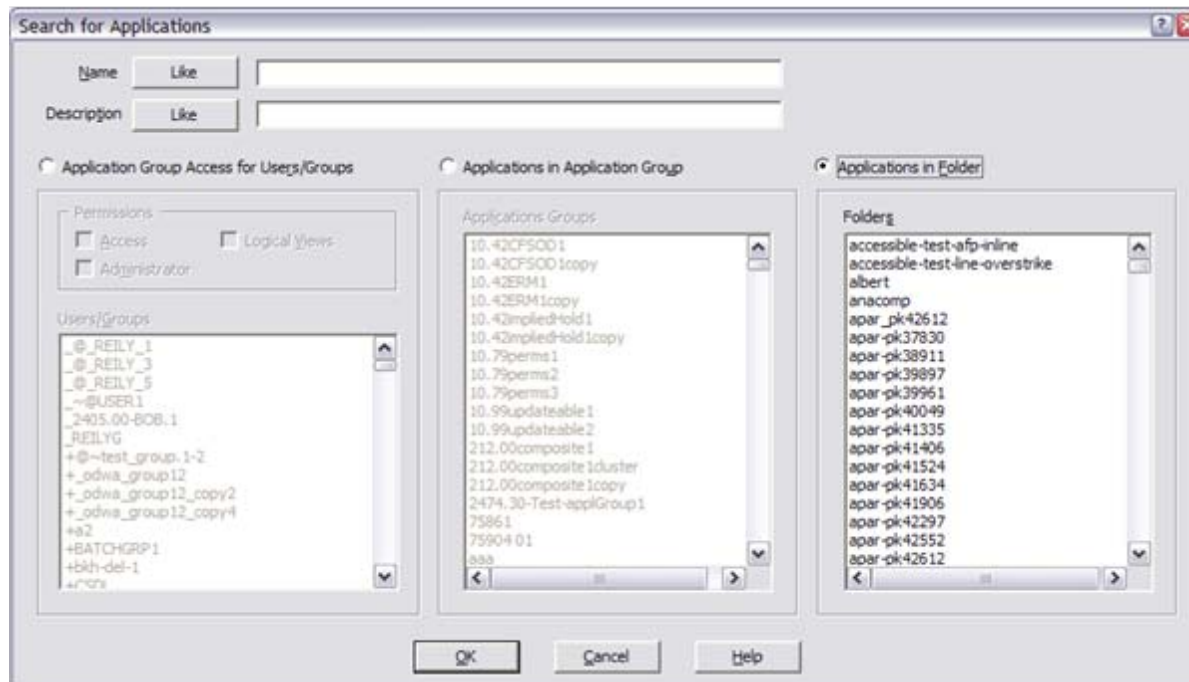
11/01/99	CLASSICAL MUSIC DISTRIBUTORS	PAGE 01	01
10/1/01/99	CLASSICAL MUSIC DISTRIBUTORS	PAGE 01	
MSR	MONTHLY SHIPPING REPORT		
MSR	10:17		
11/01/99	CLASSICAL MUSIC DISTRIBUTORS	PAGE 01	
CUS	MONTHLY SHIPPING REPORT		
10:17	FROM 10/01/99 TO 10/31/99		
CUSR94			
CUSTOMER:	Betty's Music Store		
	Muscataine Plaza		
ACC	200 Lower Muscatine		
COM	Cedar Falls, IA 50613		
ME	ACCOUNT NUMBER: 11887		
CONTACT:	Betty Yoder		
CD			
MEDIA	QTY DESCRIPTION LABEL/NO. UNT_PRC AMOUNT		
TAP	CD 4 Bartok, Sonata for Solo Violin MK-42625 8.99 35.96		
	7 Mozart, Mass in C, K.427 420831-2 9.00 63.00		
	2 Luening, Electronic Music CD 611 10.19 20.38		
CD	TAPE 9 Scarlatti, Stabat Mater SBT 48282 5.99 53.91		
	ORDER NUMBER: 536039 SHIP DATE: 10/21/99		
LP	CD 11 Beethoven, Pathetique Sonata, Arau 420153-2 5.99 65.89		
	8 Mendelssohn, War March of the Priests SHK 47592 8.99 71.92		
TA	10 Pizzetti, Messa di Requiem CHAN 8964 9.59 95.90		
LP	6 Misc., Modern Trombone Masterpieces ADA 581087 10.79 64.74		
TAP	TAPE 6 Gershwin, An American in Paris ACS 8034 5.99 35.94		



Improves manageability of documents

Folder Administration

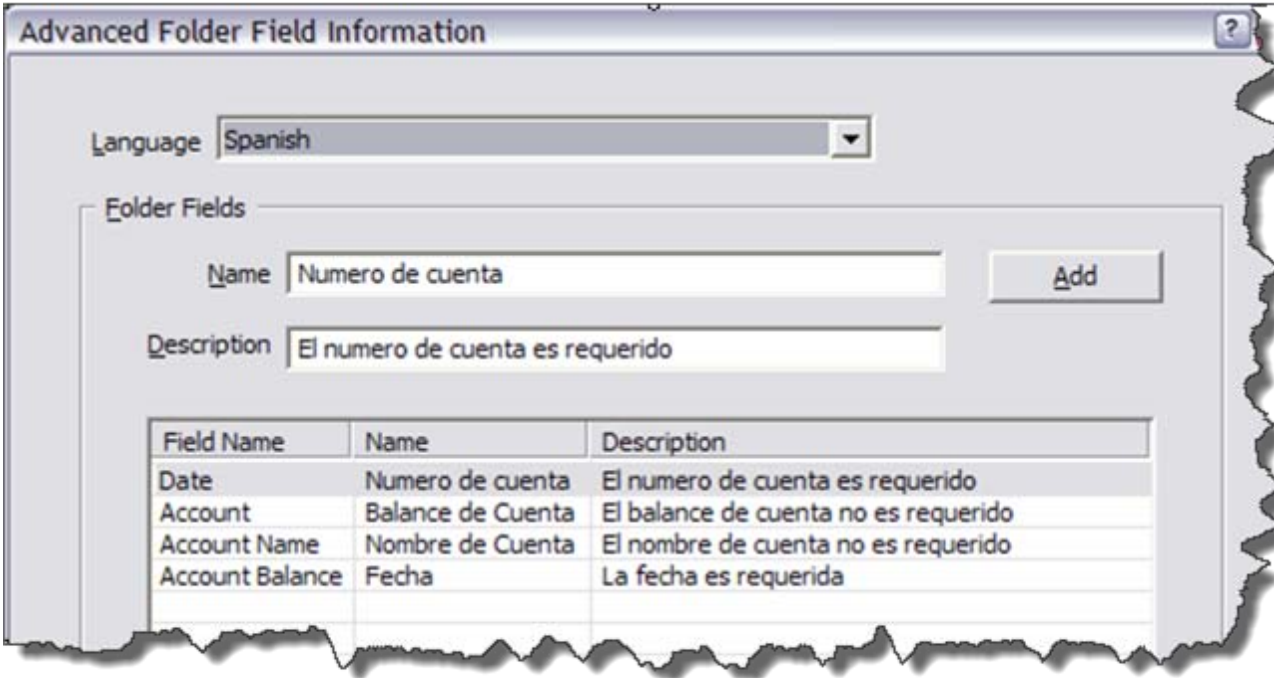
- Create a list of applications that are included in a specific folder
- Create a list of application groups that are included in a specific folder
- Create a list of folders that include a specific application



Increases productivity for OnDemand Administrators

Folders – Multiple Languages

- Multiple language folder field names for Win32 client



Advanced Folder Field Information

Language: Spanish

Folder Fields

Name: Numero de cuenta

Description: El numero de cuenta es requerido

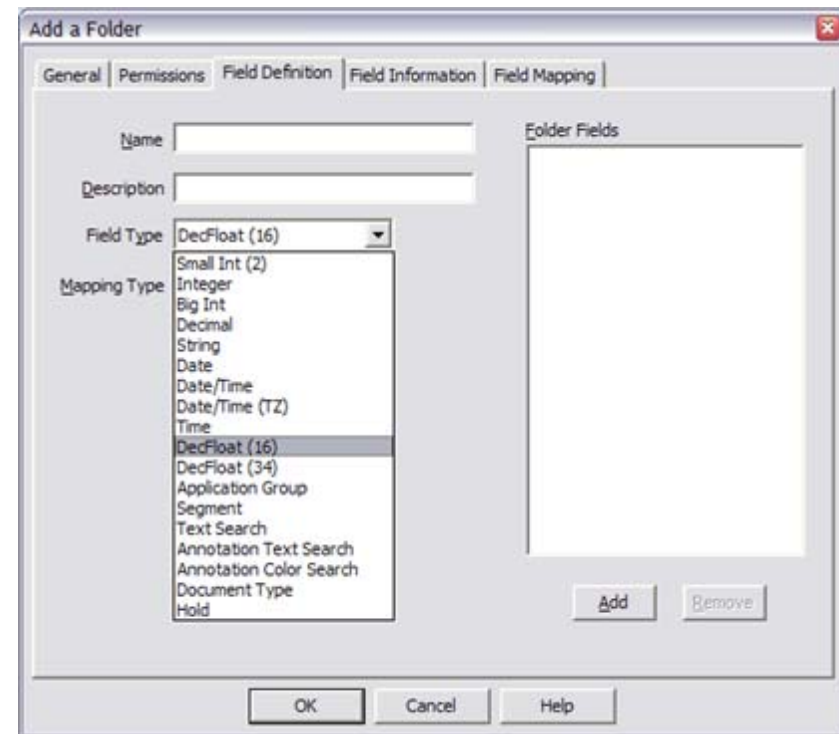
Field Name	Name	Description
Date	Numero de cuenta	El numero de cuenta es requerido
Account	Balance de Cuenta	El balance de cuenta no es requerido
Account Name	Nombre de Cuenta	El nombre de cuenta no es requerido
Account Balance	Fecha	La fecha es requerida



Desirable for customers serving multiple language user communities

DECFLOAT

- In the past OnDemand customers used DECIMAL – floating point
 - FP numbers use base 2 therefore susceptible to rounding errors
- DECFLOAT uses base 10
 - Eliminates rounding errors
 - 16 or 34 bit precision
 - Application group and folder
 - DB2 Only



Desirable for financial services customers or any customer processing financial information

CMOD Server Enhancements

- SSL
- ARSRPT – Enhanced Reporting Utility
- FIPS 140-2
 - Now store passwords as AES 128 Encryption
- PDF Indexer
- Transforms
- Windows 2008 64bit (**ONLY!**)
- HP-UX moving to HP Itanium
- ARSXML
 - Native, no java
 - No requirement for downloading Xerces (now built in)
- Additional Enhancements and Updates



Secure Sockets Layer (SSL)

- From health care to banking and finance, many industry and government regulations require the protection of sensitive data online
 - Examples include PCI-DSS, HIPAA, SOX
- Provides secure transmission between any OD Client (ODWEK, windows client, windows admin) and the OD server
 - Adds to existing SSL capabilities that have existed outside the firewall
 - Addresses the issue of unsecure internal networks
- Configurable at the server level to support either
 - Non-SSL
 - SSL
 - Or both
- LDAP Secure Sockets Layer (SSL) Support
 - Provides secure communication between the OD Server and LDAP Servers



Helps customers secure sensitive personal information

ARSRPT – Enhanced Reporting Utility

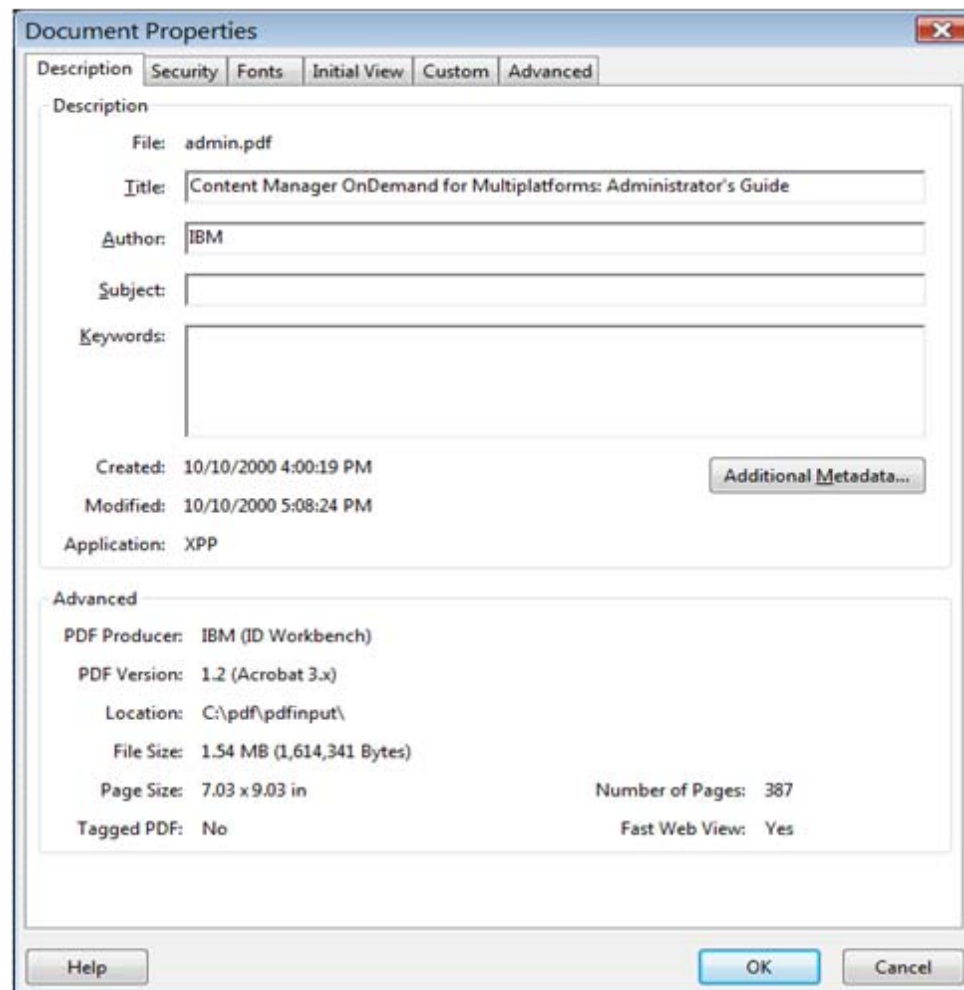
- The enhanced reporting command produces a report for a selectable 24-hour period.
- The report may be output in two file formats.
 - XML
 - Text summary
- The report covers three sets of operations of the system
 - Logins
 - Loads
 - Queries/retrieves
- Designed to help customers plan system activities, illuminate peak usage, and watch for usage irregularities.
- Technical Document
 - <http://www.ibm.com/support/docview.wss?uid=swg27019740>



*Provides Federal customers with the ability to meet current standards
Encrypts TSM passwords in the same format*

PDF Indexer

- Can now use metadata within PDFs to create indexes in CMOD
 - Metadata field names used as the index names
 - Entire PDF doc is indexed as a group
 - Cannot be combined with regular trigger indexing
- PDF resource collection now collects Forms in addition to Fonts and Images
- PDF Compression turned back on



Provides additional PDF indexing capabilities and flexibility

Transforms

- Generic 'Plug and Play' API - *new*
 - Examples of transformations using a 3rd party Transform:
 - ◆ Line data to PDF
 - ◆ AFP to PDF
 - ◆ Line data to AFP
 - ◆ Meta data to PDF
 - ◆ Meta data to AFP
- Advanced Function Presentation Transformations
 - ◆ LINE2PDF - *new*
 - ◆ AFP2HTML
 - ◆ AFP2PDF



*Provides customers the option of using any third party Transform engine
Additional transform available for AFP2WEB customers*

Other Enhancements and Updates

- Unicode support – UTF-16
 - Enhanced client/server performance
- Multiple TSM Server Support
 - Supports multiple TSM servers from the same OD Object Server
- Messages for starting/stopping
- AIX Server now 'Pure Multi-threaded' model
- Deprecated feature – ODWA (OnDemand Web Admin)
 - Customers not using this
 - Windows Admin provides added functionality
 - Graphical Indexing
- Please review PIT/PMT materials for complete details of all enhancements



*Improved Object server and Storage Server configuration flexibility
Windows Admin client provides broadest capabilities*

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