

Content Manager OnDemand

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IBM Enterprise Content Management Software

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IBM Software Solutions | Enterprise Content
Management Software



Confused about Enterprise Content Management?



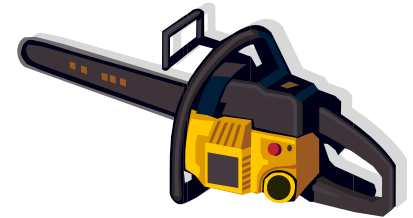
Agenda

- Differences in repositories
- Who needs CMOD and Why?
- CMOD Architecture
- CMOD Optional Features



Difference in Repositories

- There is a reason that Report Management Repositories are different than Content Management Repositories



– Report Management

- Optimized for large “loads” of many, many individual documents
- Static in nature; read-only (e.g. computer reports)

– Content Management

- Optimized for many files of varying size, format and complexity
- Interactive in nature; BPM, read/write (e.g. office documents)



- ***Forcing content from one repository into the other compromises the special features, scalability and performance of the optimized repository***

CMOD - Your on-ramp to Enterprise Content Management



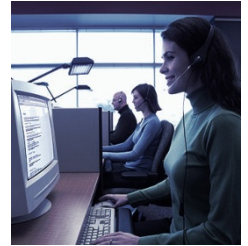
Agenda

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- Who needs CMOD and Why?
- CMOD Architecture
- CMOD Optional Features



Who Needs CM OnDemand? Anyone Who Needs....

- Instant client view of print documents
- Integrated one touch access from key business applications such as your CRM system and SAP
- Customer access via web for self service
- Ability to analyze the report data
- CSRs can choose to access via OnDemand client, OnDemand CD-ROM or with a browser
- Customer self service
- Data Transforms
- Storage efficiencies 2:1 – 30:1 compression rates



Customer Service



Telco



Utilities



Manufacturing



Banks/Financial



What do customers think?

- #1 Choice for Our Clients (the analysts think so too!)
 - Thousands of customers across all industries use CM OnDemand to archive statements, reports, policies, correspondence, check images, and more.
 - The repository of choice for many Application Service Providers.



- With over 1,600 corporate customers using CM OnDemand worldwide, finding a skilled resource nearby is relatively easy.
- The OnDemand Users Group meets each year to exchange information with each other and with IBM.

What is Driving Organizations to CM OnDemand?

- Significant ROI
 - quickly by transferring costly high volume print output to electronic information capture and presentation
- Eliminate Print
 - **reduce or totally eliminate printing cost**
- Storage Savings
 - **compression, compression, compression**
- Electronic Statements
 - **customer self service, reduced mail costs, printing**
- Information access
 - **Workers spend 35% of their time looking for information**



Why Should YOU Care about Enterprise Report Management?

Created initially as a Services Offering at the request of our AFP Print customers in the early 1990s, “OnDemand” has grown to be an integral part of IBM’s Enterprise Content Management portfolio.

- ✓ OnDemand is the clear Enterprise Report Management leader
- ✓ Proven technology that works on a wide variety of platforms

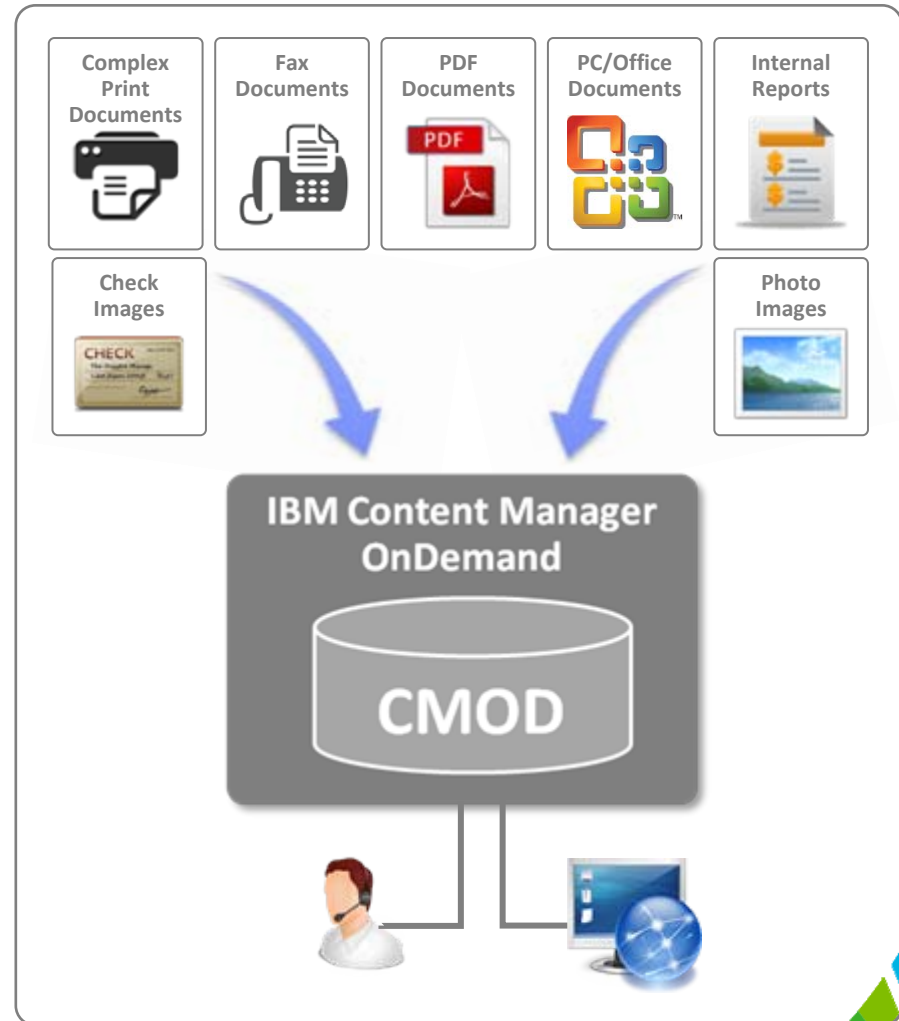


IBM Content Manager OnDemand

Key Capabilities

IBM Content Manager OnDemand is an Enterprise Report Management (ERM) solution that transforms high volume print archive and report output into on-line electronic documents needed to support critical back and front office business applications, and customer self-service operations.

- Archives high-volumes of computer generated print data and other forms of content
- Effectively captures, indexes and delivers reports, statements and other computer-generated output across the organization
- Enables electronic bill presentment and publishing information on the internet
 - Stores print streams in their native format without the need to transform them during archiving
- Automates and optimizes storage and database management, delivering cost and retrieval benefits



IBM Content Manager OnDemand

Comparing Versions

Capabilities / Features	N-3 (v8.4)	N-2 (v8.4.1)	N-1 v8.5	V9.0
Full Text Search				Y
Advanced Monitoring				Y
CMIS support / 128 metadata fields / Excel int,				Y
Report Distribution enhancements			Y	Y
SSL and FIPS -140 support			Y	Y
Improved AFP, Line and PDF data indexing			Y	Y
Expanded multi-conc. language support			Y	Y
Subsystem failover support			Y	Y
DECFLOAT support (DB2)			Y	Y
System mngt enhancements			Y	Y
Enhanced Retention		Y	Y	Y
FileNet P8 integration		Y	Y	Y
64 bit JNI support		Y	Y	Y
Indexer enhancements		Y	Y	Y
ODWEK enhancements		Y	Y	Y
Citrix on Windows client		Y	Y	Y
LDAP login authentication	Y	Y	Y	Y
Cabinet Support for Folders	Y	Y	Y	Y
Multi-char predictive search	Y	Y	Y	Y
Export to file	Y	Y	Y	Y
Filename indexing	Y	Y	Y	Y
Global annotations	Y	Y	Y	Y
Server based hit-list sorting	Y	Y	Y	Y
WEBi support / Content Navigator support	Y	Y	Y / Y	Y / Y

IBM Content Manager OnDemand

OnDemand Release Summary

2007	2008	2009	2010	2011	2012
<p>OnDemand MP 8.4.0</p> <ul style="list-style-type: none"> •ODWA •64-bit addressing space on Linux™, AIX®, HP-UX and Solaris •Native Lightweight Directory Access Protocol (LDAP) support for login authentication •Usability enhancements: •Event-based expiration •Ability to change the life of cached data retroactively •Server-based sorting •IBM WEBi •IPv6 compliance <p>OnDemand zOS 8.4.0</p> <ul style="list-style-type: none"> •Define DB2® database information •Exploitation of 64-bit addressing space on Linux™, AIX®, HP-UX, and Solaris platforms, •Expanded database support for Oracle 10g Release 2 and IBM DB2 Universal Database® V9 •AFP™ transforms 	<p>OnDemand MP 8.4.1</p> <ul style="list-style-type: none"> •Enhanced Retention Management •Support for IBM FileNet P8 •PDF indexing enhancements •Oracle on Intel Linux •Linux support for the ODWA •Additional LDAP servers supported •CITRIX support •API enhancements to ODWEK •ACIF indexer enhancements <p>OnDemand i5 6.1</p> <ul style="list-style-type: none"> •IASPs for archived data and the location of new instances. •Support for TSM as a storage level •Batch Administration •WEBi •Change life of cached data retroactively •Single table creation for an application group. 	<p>OnDemand zOS 8.4.1</p> <ul style="list-style-type: none"> •Enhanced Retention Management •Support for IBM FileNet P8 •OS/390® indexer enhancements •ODWEK 64-bit •OnDemand Distribution Facility support for PDF e-mails •PDF indexing enhancements •Citrix support •API enhancements to ODWEK •ACIF indexer enhancements •Consumability and usability enhancement 	<p>OnDemand i5 7.1</p> <ul style="list-style-type: none"> •Enhanced Retention Management •PDF indexing enhancements •Support for IBM FileNet P8 •AFP2WEB for inbound/outbound transforms of AFP to HTML or PDF •Support for Sun and Novell LDAP servers •API enhancements to ODWEK <p>OnDemand MP 8.5.0</p> <ul style="list-style-type: none"> •Unicode support •Multiple language folder field names •64-Bit Windows Server •SSL support between OnDemand client and server •FIPS 140-2 •DECFLOAT in DB2 •Multiple TSM servers from the same Object Server 	<p>OnDemand zOS 8.5.0</p> <ul style="list-style-type: none"> •Enhanced reporting and analysis •Indexing enhancements for AFP and PDF data •Support for SSL communication with LDAP •FIPS 140-2 •Multiple language folder field names •Unicode support •Multiple TSM servers •DECFLOAT data type in DB2 •Extend OAM repository interface •Enhancements for ease of installation •Administer ODF from the OnDemand Windows Administrator. 	<p>OnDemand 9.0 MP and z</p> <ul style="list-style-type: none"> •Full Text Search •FSM Integration •User Proxy •Password restriction •Last Login •RDF Performance •Database timestamp •128 Metadata fields •Adding fields to existing folder def'n •Graphical Annotation in Line Data Applet •Enhanced Metadata Update •OOTB integration with Excel •CMIS Read-Only •OS/390 Indexer on AIX •Unicode support •Multiple language folder field names •64-Bit Windows Server •SSL support between OnDemand client and server •FIPS 140-2 •DECFLOAT in DB2 •Multiple TSM servers from the same Object Server



IBM Content Manager OnDemand

Compression and Optimizing PDF File Storage

8:1 to 30:1

Typical Compression Ratios



The Content Manager OnDemand PDF indexer now supports resource grouping and removing unused resources. After you enable resource grouping, common resources across statements in a single report are grouped and stored as a single instance, and unused resources from a report can be removed before indexing. These features can save a tremendous amount of disk space and reduce cost.

IBM Content Manager OnDemand

Datawatch Integration



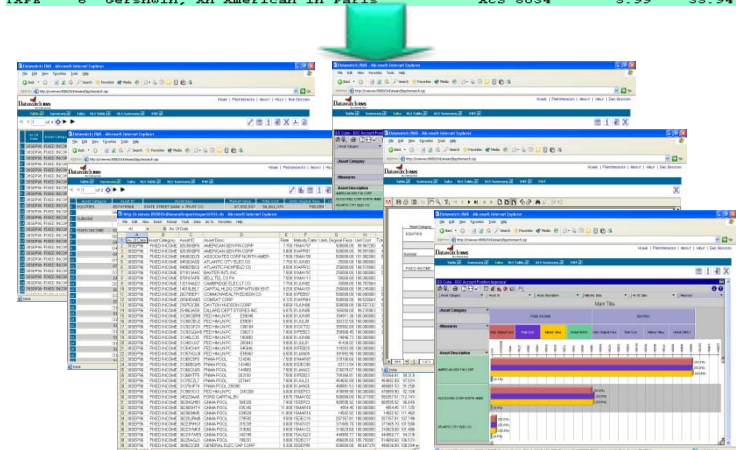
- Web-based Report Mining Solution
 - Automatic report data transformation based on Monarch server technology
- One-click access to any report data in web and Excel spreadsheets format
- In browser data filtering, sorting and graphing of report data
 - Summary report engine
 - Optional drag-and-drop multi-dimensional cube-based analysis tool
 - XML enable reports

11/01/99 CLASSICAL MUSIC DISTRIBUTORS PAGE 01
10:17 MONTHLY SHIPPING REPORT
MSR94 FROM 10/01/99 TO 10/31/99

CUSTOMER: Betty's Music Store
Muscataine Plaza
200 Lower Muscatine
Cedar Falls, IA 50613

ACCOUNT NUMBER: 11887
CONTACT: Betty Yoder

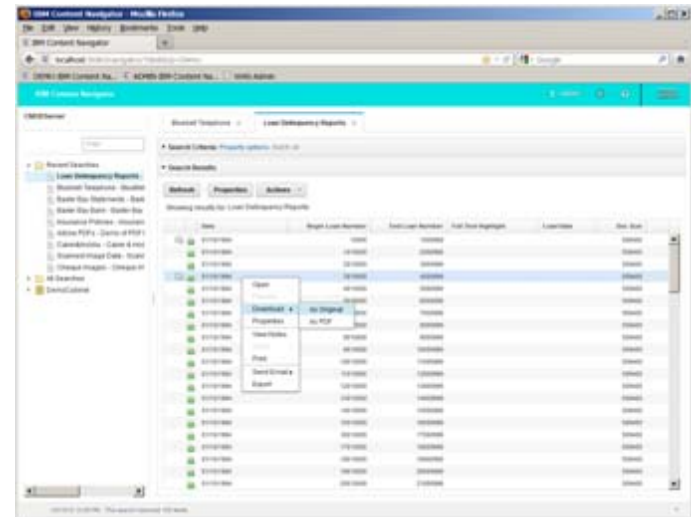
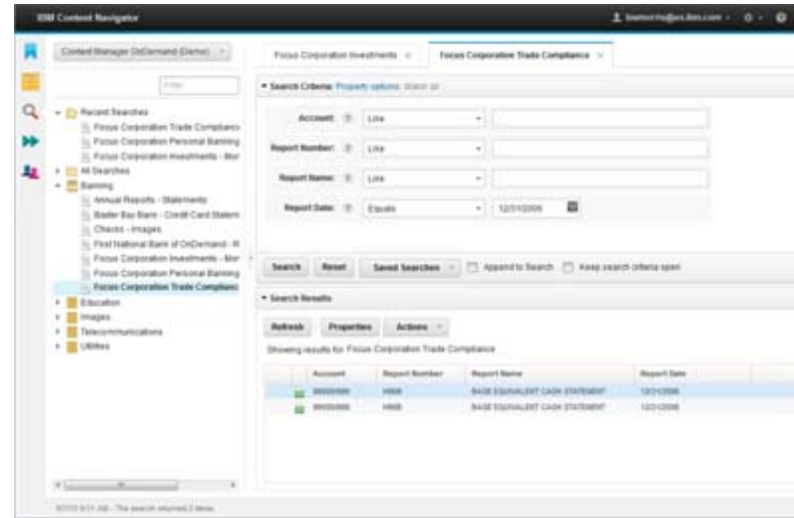
MEDIA	QTY	DESCRIPTION	ORDER NUMBER:	SHIP DATE:	LABEL/NO.	UNT_PRC	AMOUNT
CD	4	Bartok, Sonata for Solo Violin	536017	10/06/99	MK-42625	8.99	35.96
	7	Mozart, Mass in C, K.427			420891-2	9.00	63.00
	2	Luening, Electronic Music			CD 611	10.19	20.38
TAPE	9	Scarlatti, Stabat Mater			SBT 48282	5.99	53.91
ORDER NUMBER: 536039 SHIP DATE: 10/21/99							
CD	11	Beethoven, Pathetique Sonata, Arau			420153-2	5.99	65.89
	8	Hendelsson, War March of the Priests			SMK 47892	8.99	71.92
	10	Pizzetti, Messa di Requiem			CHAN 8964	9.59	95.90
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



IBM Content Manager OnDemand

IBM Content Navigator for Search

- Saved Searches List - Users can access their cabinets and folders in a tree view, filter the tree view and access recently used searches
- Saved Search Criteria - Similar to the OD windows client, users can save query criteria associated with an OD folder
- Append Search – Ability to add results from a new query to an existing query result set.
- Print – Ability to send one or more documents to a local or server printer.



Mobile



Content Manager OnDemand

Compliance Requirements & Retention Management

Compliance Requirements



- OnDemand provides a long-term archive of critical business documents for companies
 - Recent OnDemand releases added key capabilities to enable companies to meet compliance requirements
 - Built-in retention management and hold
 - Support for IBM Enterprise Records (P8 Records Manager)

Retention Management



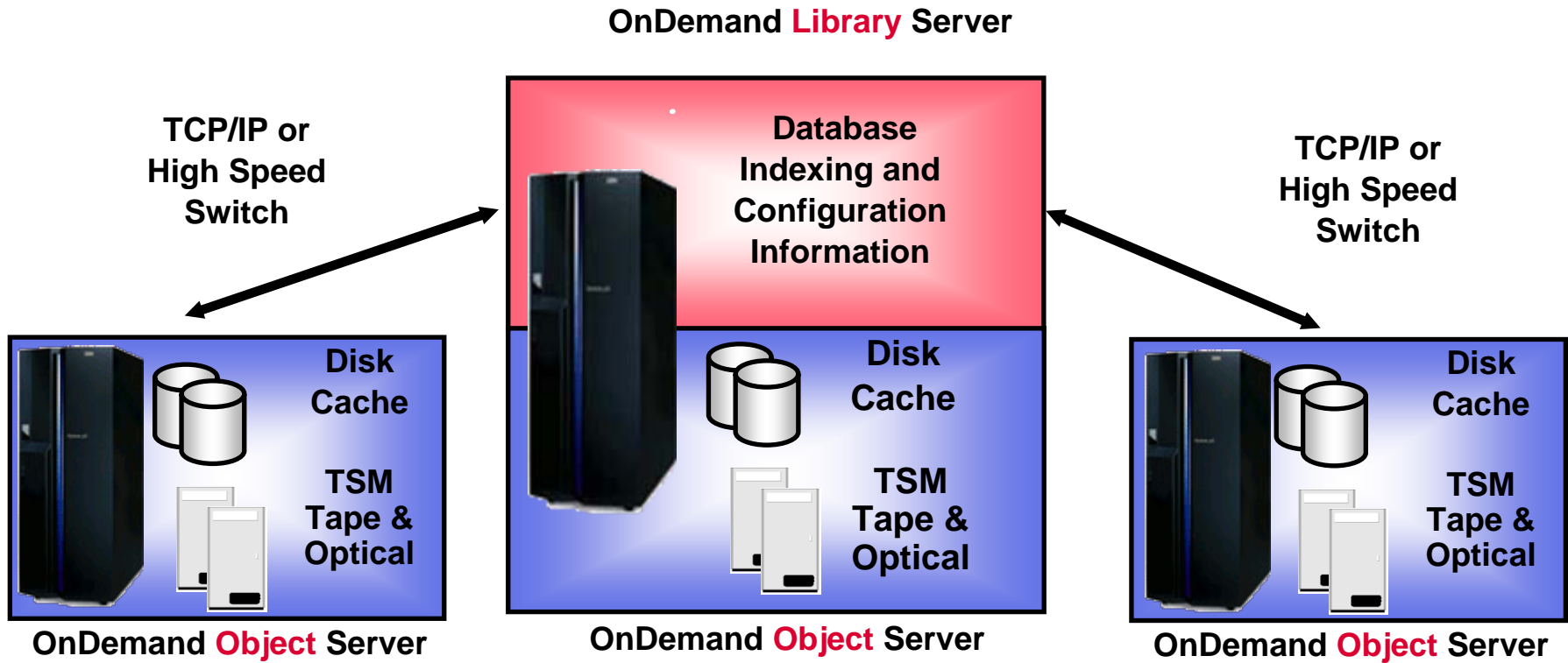
- OnDemand supports time-based retention at the application group level
- Document deletion is managed efficiently for different media types
 - OnDemand has native support for putting individual documents on hold
 - OnDemand also integrates with IBM Enterprise Records

Agenda

- Differences in repositories
- Who needs CMOD and Why?
- **CMOD Architecture**
- CMOD Optional Features



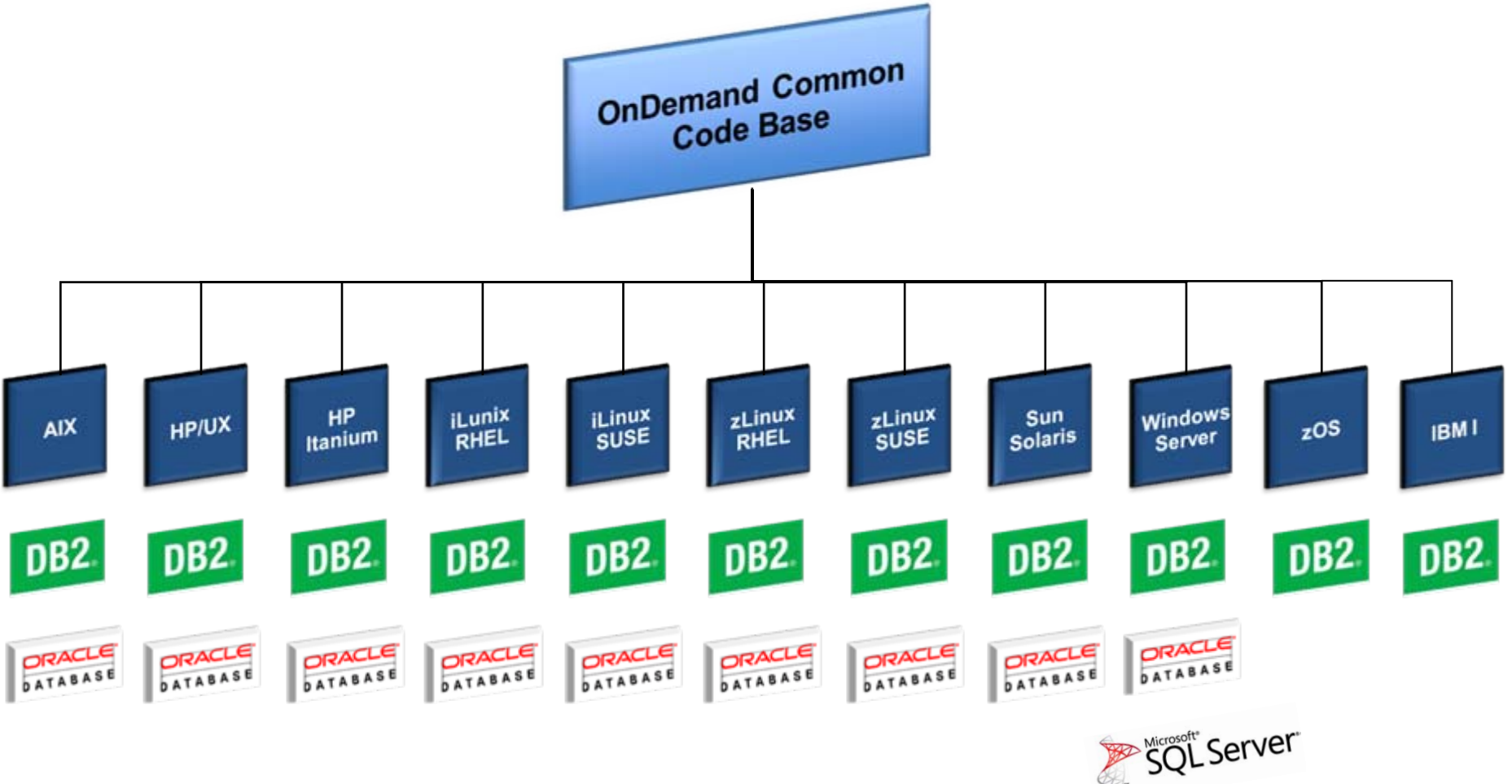
OnDemand Server Structure



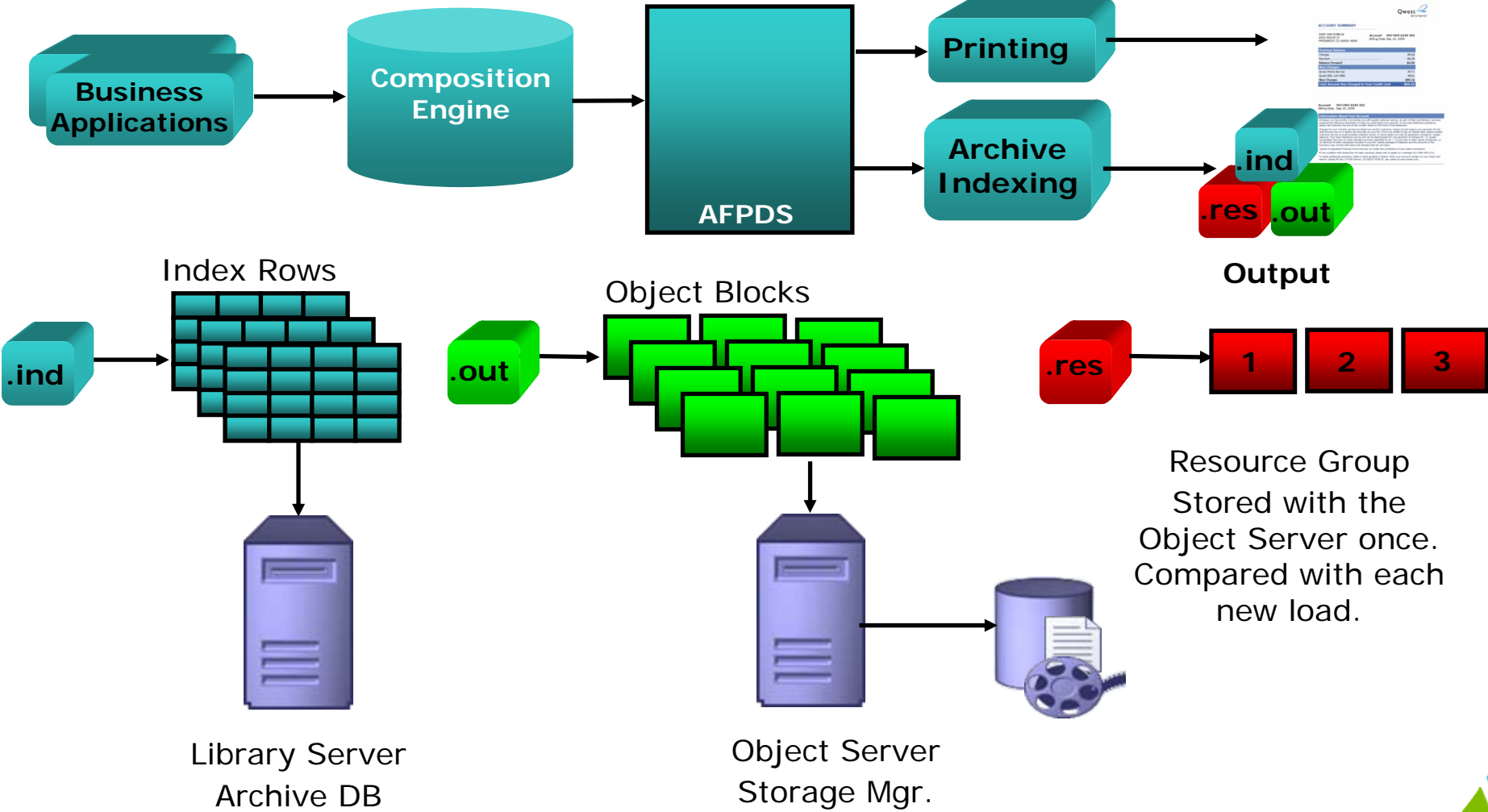
Additional

Additional

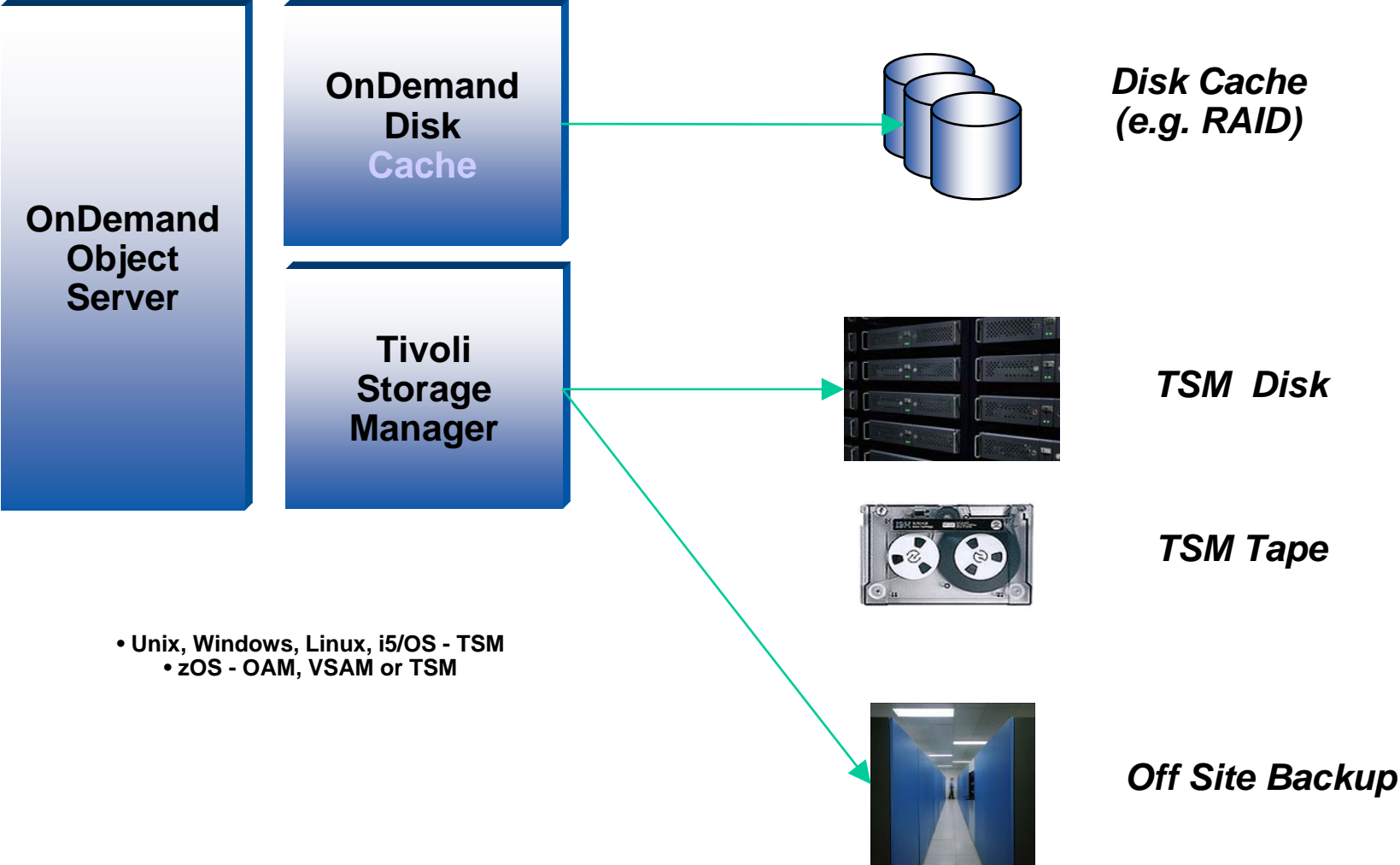
Platform and Database Support



Print Archiving Flow



Storage Management



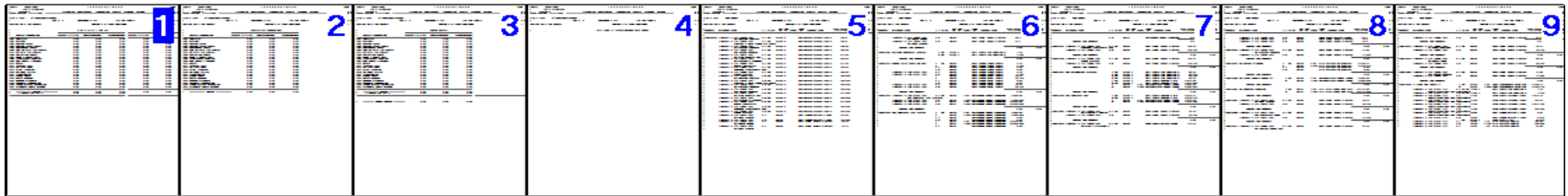
- Unix, Windows, Linux, i5/OS - TSM
- zOS - OAM, VSAM or TSM



Segmentation, Compression & Indexing

For 10 TB you need only 1-2 TB of storage

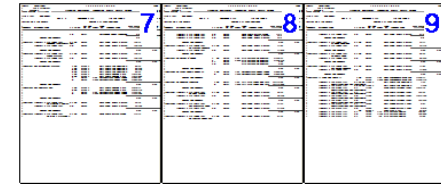
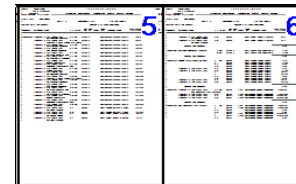
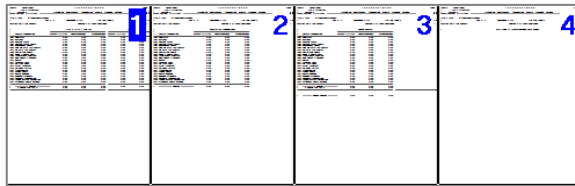
Print Data Stream (e.g. 500K pages total)



Statement 1

Statement 2

Statement 3



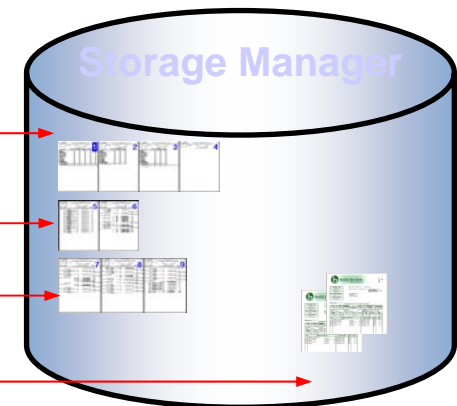
John Smith
123-11-2001

Ron Smith
523-22-6678

William Smith
709-03-4332

DATABASE

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



Publishing to the Web

DB2 – Oracle – SQL Server

Name	SSN	Object	Offset
John Smith	709-03-4332	1FAA	0
Ron Smith	123-11-2001	1FAA	22560
William Smith	444-00-1289	1FAA	35120

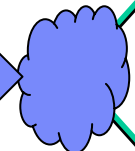
Library Server

Object Server

AFP Documents

Web Server
ODWEK

AFP2PDF



PDF Web Viewing



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OnDemand Optional Features

- Enhanced Retention Management
- Report Distribution
- Full Text Search
- ECM System Monitor
- PDF Indexer
- AFP Transforms



Compliance Requirements

- OnDemand provides a long-term archive of critical business documents for companies
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OnDemand Retention Management

- OnDemand supports time-based retention at the application group level
- Document deletion is managed efficiently for different media types
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- OnDemand also integrates with IBM Enterprise Records

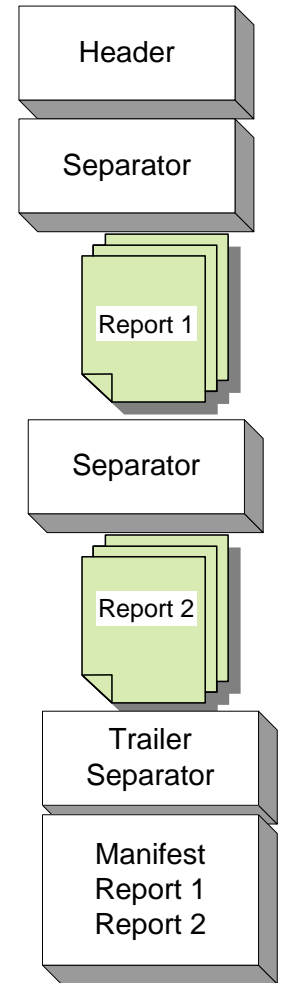
The screenshot displays the OnDemand Retention Management interface. At the top, there is a 'Search Criteria' section with several filters: Account (Like, %), Date (Between, 11/20/93 and 08/22/08), Account Name (Equal To), Account Balance (Equal To), Lockdown (Equal To), CFS (Equal To), and Hold (Equal To). Below this is a 'Document List' section containing a table of documents. A context menu is open over the table, showing options like 'Spreadsheet', 'Listbox', 'View Notes...', 'Add Note...', 'Apply Hold for All Selected...', 'Release Hold for All Selected...', 'Show Holds...', 'Send Metadata to FileNet for All Selected', 'Sort Column Ascending', 'Sort Column Descending', 'Copy', 'Find in List...', 'Find in Column...', 'Find Previous', 'Find Next', 'Select', 'Deselect', 'Invert', and 'Properties...'. The status bar at the bottom left shows 'ready'.

Date	Account	Account Name	Account Balance	Lockdown
05/03/94	000-000-000	SMITH CYCLERY CO	197.32	0
05/03/94	000-000-001	ADRIAN CYCLERY	1521.54	0
05/03/94	000-000-002	JACK'S CYCLERY	1854.50	0
05/03/94	000-000-003	DENNIS BICYCLE SHOP	1927.17	0
05/03/94	000-000-004	TERRY'S SPORTS	997.64	0
05/03/94	000-000-005	COBBLESTONE		0
05/03/94	000-000-006	SUMMIT SPO		0
05/03/94	000-000-007	ANN ARBOR C		0
05/03/94	000-000-008	CAMPUS BIKE		0
05/03/94	000-000-009	CYCLE CELLA		0
05/03/94	000-000-010	GREAT LAKES		0
05/03/94	000-000-011	STUDENT BIR		0
05/03/94	000-000-012	WASHTENAW C		0
05/03/94	000-000-013	GETAWAY SPC		0
05/03/94	000-000-014	TEAM III SC		0
05/03/94	000-000-015	BAY VAC & F		0
05/03/94	000-000-016	BELL'S BIKE		0
05/03/94	000-000-017	BIKE SHOP		0
05/03/94	000-000-018	JACK'S BICY		0
05/03/94	000-000-019	R S CYCLING		0
05/03/94	000-000-020	STABLE & CY		0
05/03/94	000-000-021	SURF SKATE		0
05/03/94	000-000-022	METRO BIKES		0
05/03/94	000-000-023	SPORE & GEA		0
05/03/94	000-000-024	JERRY'S BIC		0
05/03/94	000-000-025	MG BICYCLE		0
05/03/94	000-000-026	PRO CYCLE C		0

Report Distribution Features

Report distribution allows you to:

- Group documents together and place them into a bundle
- Optionally convert the report data into different formats
- Distribute reports to multiple OnDemand users
- Distribute single or multiple copies of each report
- Send reports by e-mail or make them available for printing
- Send e-mail notifications to administrators about distributions



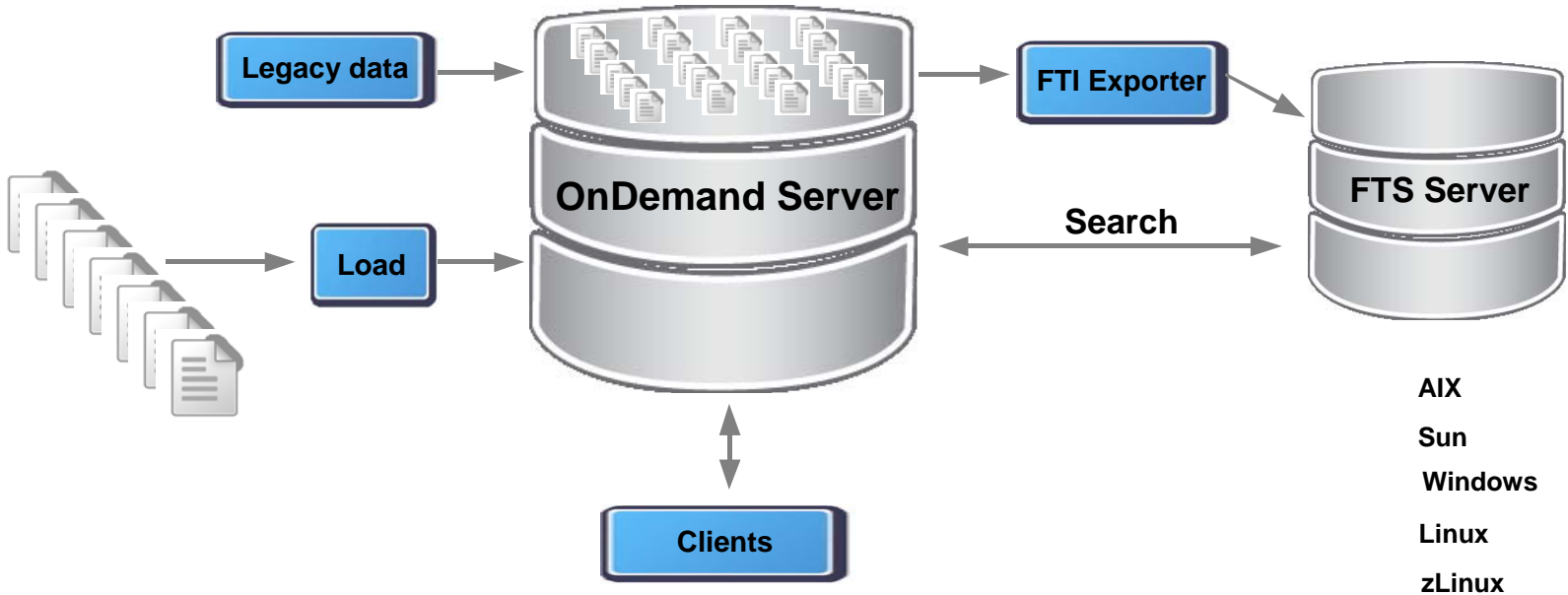
Full Text Search and Indexing

- Full Text search (FTS)
 - Search complete document text, not just meta data, title, abstracts, etc.
 - Searching the index supported by all OD servers
 - Documents grouped by “collections”
 - Addresses use cases for Reports and Transaction data that cannot be supported by conventional meta data
 - E.g., Transaction numbers, stock symbols
 - FTS server supported on AIX, Sun, Linux, zLinux and Windows
- Benefits
 - Search CMOD by entire document – not just meta data, titles and abstracts.
 - Allows complex query support.
 - Wild cards, fuzzy / similar words etc.



Full Text Search Benefits

- 1. Search CMOD by entire document – not just meta data, titles and abstracts.
- 2. Index Reports by data that cannot be supported by conventional meta data i.e. stock symbols
- 3. Faster implementations



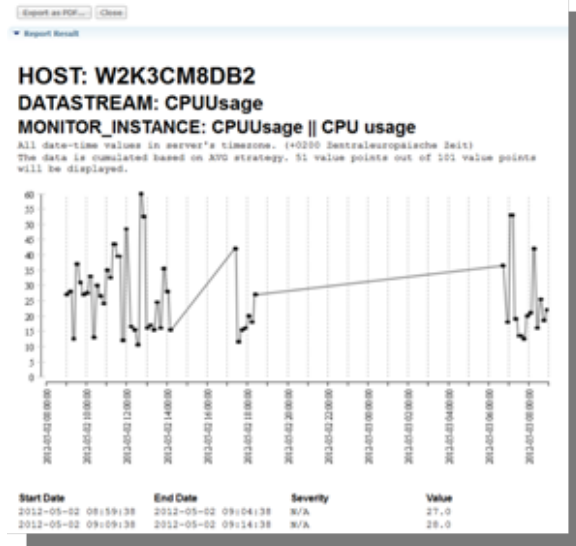
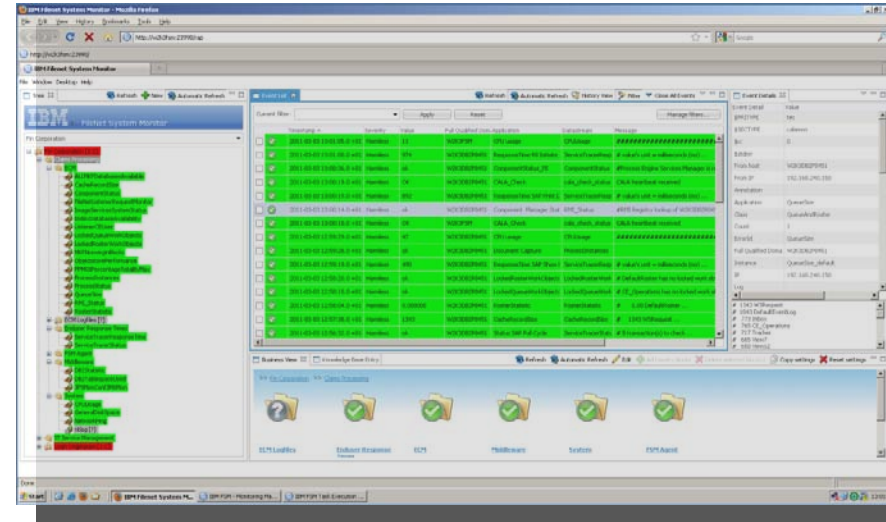
Advanced Monitoring

- **IBM ECM System Monitor**
 - Proactive health monitoring for CMOD & IT services
 - **Red / Yellow / Green** – traffic light paradigm
 - Built-in Knowledge base
 - Separate product purchase/license
- **IBM System Dashboard for Enterprise Content Management**
 - Identify potential performance issues before they occur
 - Separate downloadable component
- **Benefit:** Ensure peak performance and uptime



ECM System Monitor

- Proactive functional health monitoring for CMOD environment
- Extendable Knowledge Base
 - Fast problem analysis & resolution
- Automate routine tasks & events
- Historical Analysis and Trends reporting
- Integrates with IT Service Management (ITSM) tools
 - Event forwarding to central Event Management (IT Operations)
 - Trouble Ticket opening in Incident Management (Service Desk)
- Reduces ECM platform operations costs



PDF Indexer for Content Manager OnDemand

- GUI Wizard for selecting triggers and fields from the PDF document
- Common PDF resources extracted for storage, combined at retrieval
- Removal of unused resources
- Data compression, not image PDF's
- Support of BOOKMARKS parameter in PDF graphical indexer
 - PDF Indexer Floating Trigger support
 - Enables indexing where trigger is not consistent from page to page in a PDF document
 - Data type “User Defined – PDF” in the report Wizard - creates an application with a data type of User Defined, a File Extension PDF, and PDF indexer parameters
 - Enables a user using the windows based client to view a PDF without the need for a full license of Adobe PDF.



On-the-fly Conversion

CMOD

DB2 – Oracle – SQL Server

Name	SSN	Object	Offset
John Smith	709-03-4332	1FAA	0
Ron Smith	123-11-2001	1FAA	22560
William Smith	444-00-1289	1FAA	35120

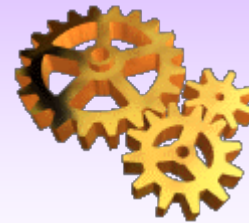
Library Server

Object Server



AFP Documents

Web Server
WAS
ODWEK
WEBI



AFP2PDF
Line2PDF

Browser
Client
Viewing with
Adobe



PDF Documents

Product Help & Documentation

- Quick Start Guide
- Installation and Configuration Guide
- Administration Guide
- ODWEK Guide
- Indexing Reference Guide
- Client Installation Guide
- Messages and Codes Guide
- Windows Client Customization Guide
- AFP2PDF Transform User's Guide
- AFP2XHTML Transform User's Guide
- Report Distribution
- AFP plugin online help
- Administration client online help
- Client online help
- **RedBooks**



धन्यवाद

Hindi

多謝

Traditional Chinese

ขอบพระคุณ

Thai

Спасибо

Russian

Gracias

Spanish

شكراً

Arabic

Thank You

English

Obrigado

Brazilian Portuguese

Grazie

Italian

Danke

German

Merci

French

நன்றி

Tamil

多谢

Simplified Chinese

감사합니다

Korean

teşekkür ederim

Turkish

ありがとうございました

Japanese



Backup Slides



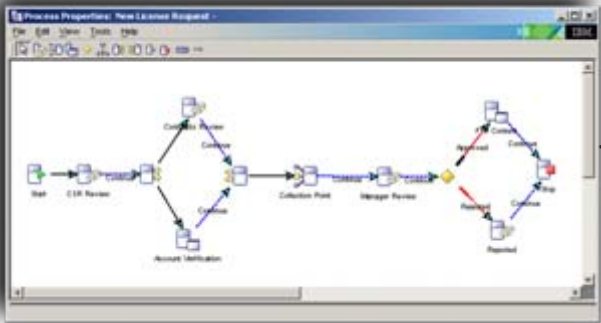
Content/Image versus Archive

P8 & CM8

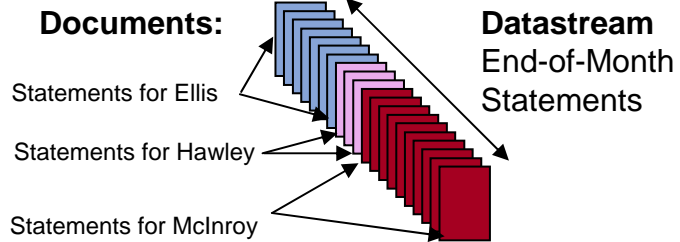
- Work in progress
- Content/Image System
- Paper intensive
- Individual documents
 - Word
 - Scanned
 - Fax
- Document management

CMOD

- After Process
- Long term archive
- Large datastreams with potentially 1,000,000+ documents daily
- Ideal for check image archive
- Many documents loaded at the same time
- Little or no workflow
- NO report creation capability
- Documents loaded in batch

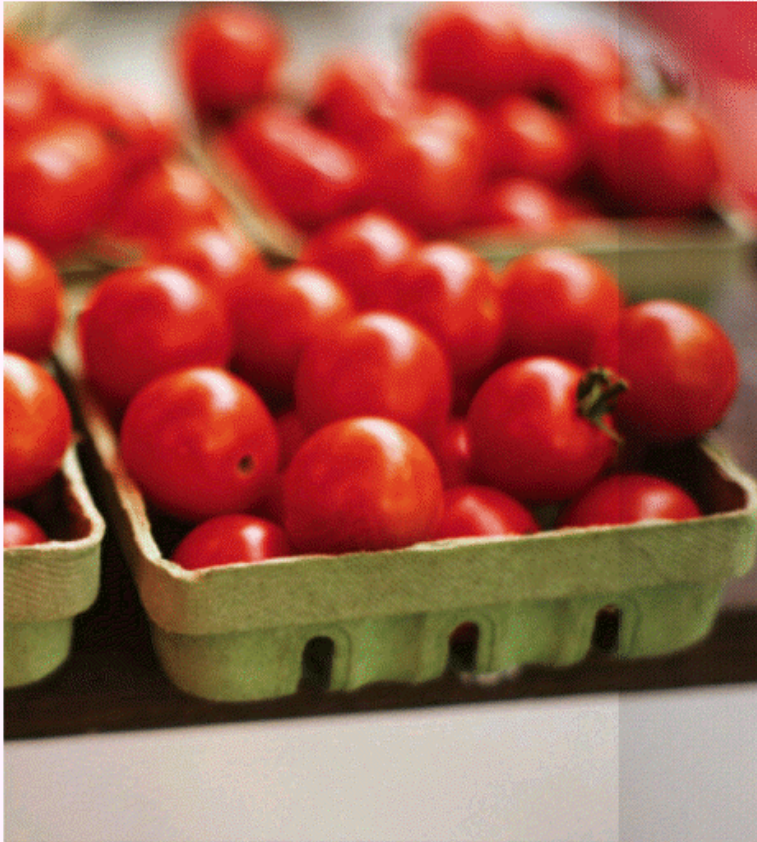


ne



Going GREEN!

- Morgan Stanley – Top 50 items for going green
- CMOD helps with 4 of the top 50



42. Shop fresh

Fresh produce requires less packaging and can help improve your diet and overall health.

43. Recycle your plastic bags

Of the more than 350 billion plastic bags Americans use each year, fewer than 10% are recycled.

www.earth911.org

44. Drink organic

Three times less energy is required to produce organic milk than normal milk.

45. Pay bills online

Easy and saves postage stamps too.

46. Put a lid on saucepans when cooking

This reduces heat loss and makes cooking quicker, using less energy.

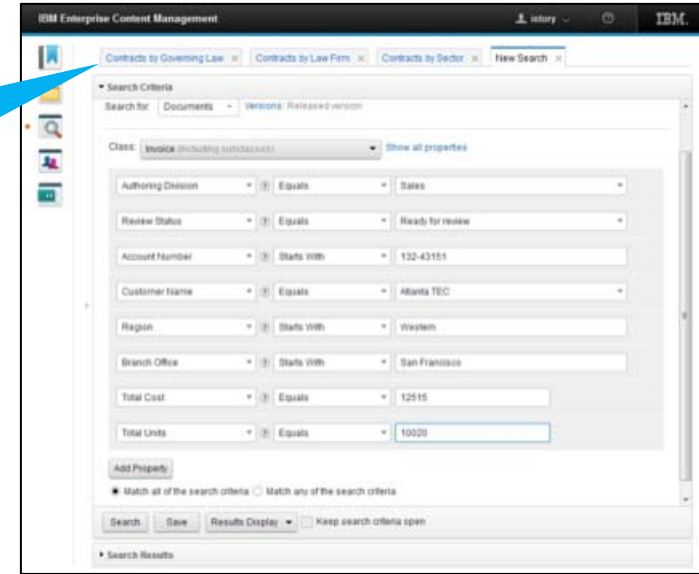
- <http://www.morganstanley.com/about/community/littlegreenebook/>

IBM Content Manager OnDemand

IBM Content Navigator for Imaging and Capture

- Business Processes
- Work Assignment
- Image & Statement Viewing
- Side by Side and Tabbed viewing
- Annotations
- Redaction

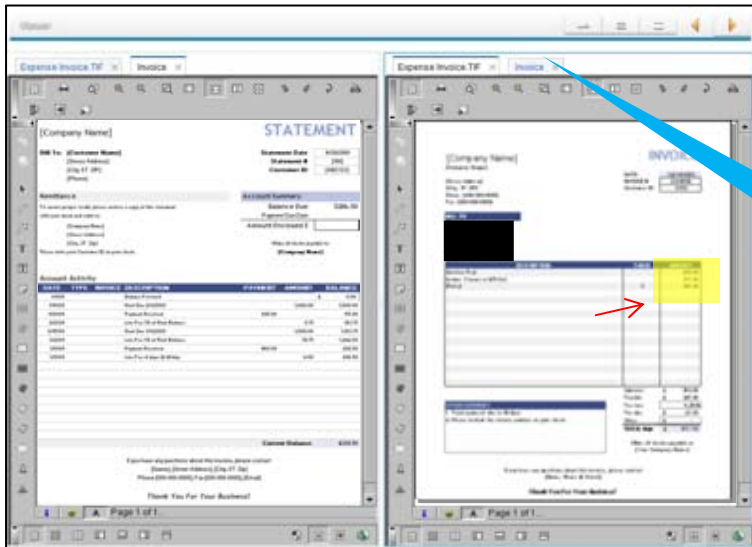
Multiple Searches



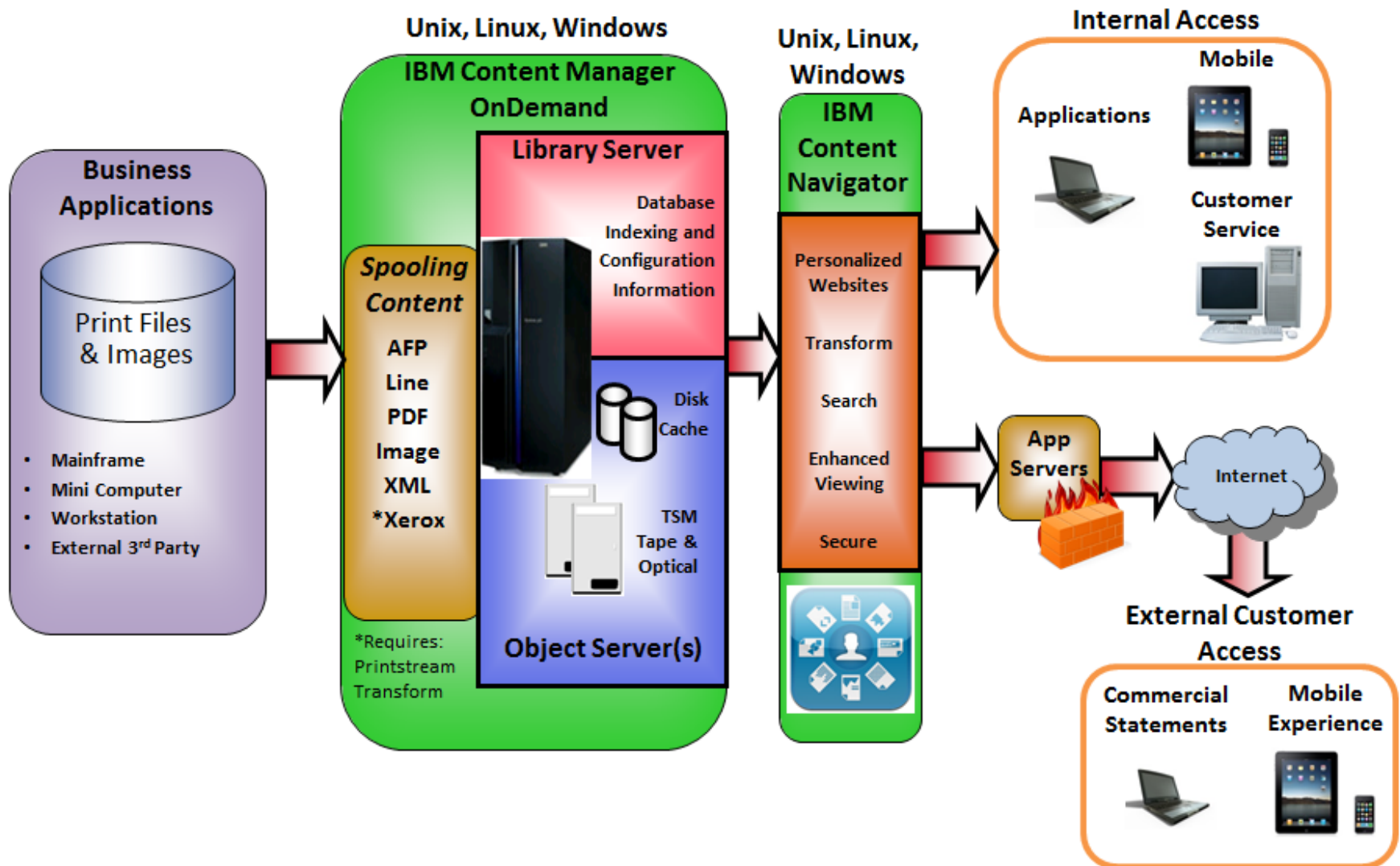
Role Based In-baskets



Tabbed & Side-by-Side Viewing



IBM Content Manager OnDemand Conceptual Architecture



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

