

# **Content Manager OnDemand Product Overview**

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### **TOO MUCH PAPER???!!!**

Have you ever looked up your bank statement online?

A check image?

Your credit card statement?

Your phone bill?

Congratulations! You're an OnDemand user!





# Reality

Today's fast paced, twenty four hour a day, constantly connected consumers expect instant access to information that has traditionally been delivered in printed format. They seek ecologically friendly delivery of information 24x7. Content Manager OnDemand enables your organization to meet these requirements while saving costs associated with print, fulfillment and retention of critical transaction documents.



# Today customers demand more information, more often...

- Access transactional content 24x7
- Single view of my data into your enterprise
- View me as one customer
- Can I see that on my phone, tablet and laptop please? (Do you have teenagers or young adult children? Do they even pay attention to paper mail?)
- Protect my data... or else!
- And save the planet...





### Do you know your customer?

 How often have they contacted Customer Services?

• What's on the latest statement sent to them?

• Does your customer feel like you know them when they call?





### **Every touch point creates a picture**

- Each transaction with your customer, partner, patient, or constituent snaps a picture.
- What are you doing with those pictures?
- Are you leveraging your brand?
  - Are you using these touch points to market new solutions?
  - Are they being leveraged to save your customers time and money?
  - Are they creating customer loyalty?
  - How long will this touch point last in the mind of your customer? Is the experience good or bad?

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### **Gather pictures and connect them**

•Electronic images – of documents, records and reports – can be collected, arranged and annotated in a way that enables a clear view of the customer

- Invoices
- Statements
- Transcripts
- Policies
- Claims
- Reports
- Images
- Checks





### **Pictures can move anywhere - instantly**

- •Electronic images can move in real time to deliver answers on demand
  - Give Customer Service reps access to any document needed with a click
  - Provide customers with self service access to statements and bills
- •Extract reports to:
  - Understand what interests your customers
  - Run your business

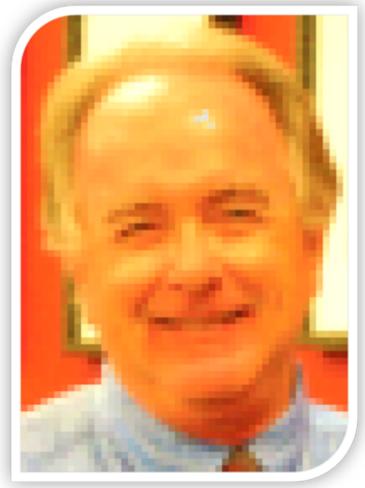




### Master the big picture – Enterprise Report Management

•Enterprise Report Management helps your organization:

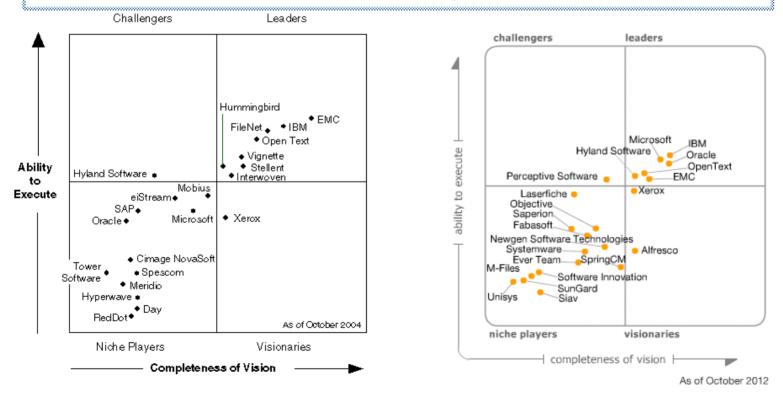
- Remove paper and process inefficiencies
- Handle inquiries and satisfy customers in a timely manner
- Provide self-service access to reports and documents



#### IBM

# IBM ECM remains a consistent leader in Gartner's Magic Quadrant

"As a strategic approach, ECM can help enterprises take control of their content and, in so doing, boost effectiveness, encourage collaboration and make information easier to share." Gartner – October, 2012





A foundation for enhanced customer service

- A Smarter Commerce solution for:
  - Documents used in customer relationships
  - Electronic Reports to communicate business performance and measure activity
- Industry Standard for Bill Presentment and Customer Service
- Mature, stable, scalable and growing
- Broadest range of hardware and software platforms





#### Improve customer communications, reduce costs, gain new client insights

#### How can I gain insight into trends trapped in my existing information!

#### •Mine your data stored in the repository through eReport Management

- •Enable back-office research on reports
- •Mine information from statements & reports
- •Gain new insight into customer through existing data

#### How can I reduce costs associated with document delivery?

#### •Implement eStatement Presentment and Retrieval

- •Facilitate enhanced communication for call centers by providing exact same content
- •Eliminate costs associated with print and mail
- •Enable direct access to customer bills and statements
- •Eliminate environmental impact of paper delivery



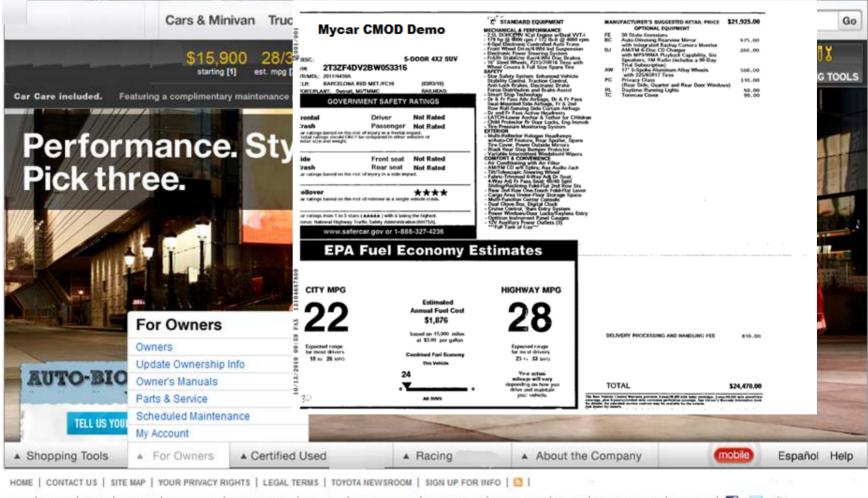
#### How can I store customer communications more effectively?

#### •Enable High Volume Archive and Retrieval of Static Content

- •Provide Online access to statements
- •Allow historical retrieval of invoices
- Access check images
- •Provide confirms electronically
- •Avoid storing paper documents this is not cost-effective and exposes
- you to total loss if documents are destroyed



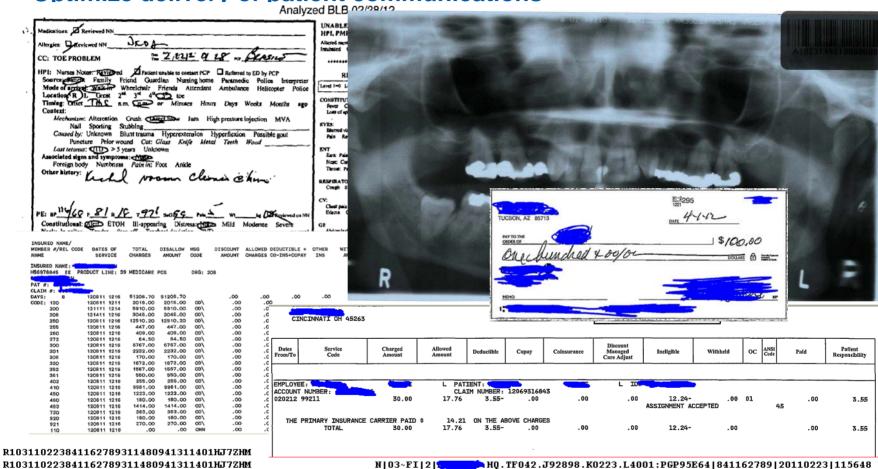
Enhance vehicle resale value and increase customer loyalty



Cars | Trucks | SUVs | Minivan | Crossovers | Hybrids & EVs | Vehicles | Fuel Economy | Accessories | Car Dealers | Safety | Financial Tools | Entune 🍽 | 🌠 📘



### **Content Manager OnDemand** Optimize delivery of patient communications



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11Bn docs loaded. 5M to 6M loaded daily. 3000+ search/retrieves daily. Less than 1 second to process.



#### Credit card companies improve customer service and reduce costs

Is your storage growth matching your IT budget growth?

- In house repository lacked function, and was difficult to maintain
- Poor level of customers service
- High development costs
- 100,000 customers accessing statements per month
- Opportunity to reduce CSRs by 50%
- CMOD compression enabled 75% reduction in SAN storage
- Reduce on/off shore development resources
  - Expect reduction from \$200K to \$25K
- \$110K annual savings in storage costs
- ROI of 63%, NPV \$643K
- And, better customer service!!!





Online retailers reduce customer transaction & statement processing costs

- Maintaining contact with customers who engage online required retention of invoices and statements
- Online transaction growing at 40%
- Amount of storage becoming unmanageable
- Wanted to stay ahead of the competition
- 50 million current customers and 3 million retailers
- On-line storage of one year means 636 million statements at current customer bas
- Payback period of 20 months
- 7 year ROI of 338%
- Document storage compression at 10:1 ratio
- Enables customers to find all historical transactions and records



### IBM

### **Content Manager OnDemand** A legacy of big numbers

### Compression

30:1

Creates cost savings of 50%

- Get the most out of disk devices
- Petabytes of data under management
- No penalty during access

Optimize hardware and manage IT costs

#### Performance

3500

#### Items per second

#### Retrieval is instant

- Multiplatforms, zSeries, iSeries, Web interface
- FileNet System Monitor for application health management
- Content Navigator

Customers expect immediate access – and get it

#### See

http://www.viewpointe.com/uploadedFi les/201202\_Check%20Archive%20fac tsheet.pdf **29PB......185 billion items.....8.7** 

million retrievals per day!

#### **Scalability**

185

Billion documents stored

Architecture is unique in the industry

- 8.7 Million retrievals/day
- Scales from department to enterprise deployments

Start small and grow your application

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## **Difference in Repositories**

 There is a reason that <u>Report Management Repositories</u> are different than <u>Content Management Repositories</u>

#### -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





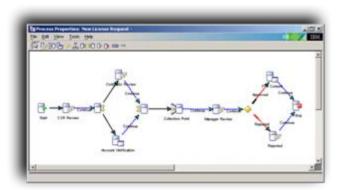


### IBM

# **Content/Image versus Archive**

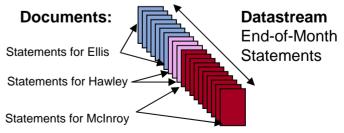
### P8 & CM8

- Work in progress
- Content/Image System
- Paper intensive
- Individual documents
  - Word
  - Scanned
  - Fax
- Document management
- Creation, versioning, check in and out
- Documents loaded one at a time



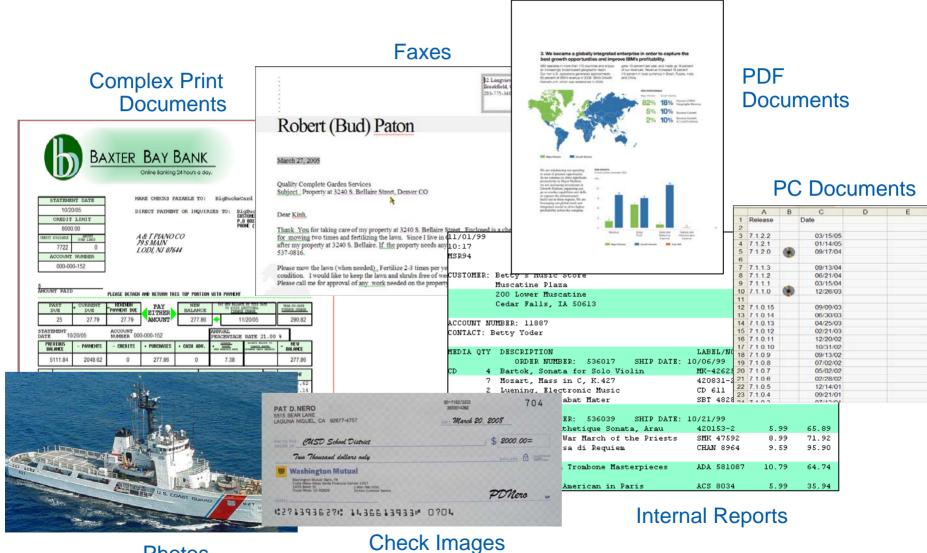
### CMOD

- 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





### **Types of Content Supported**

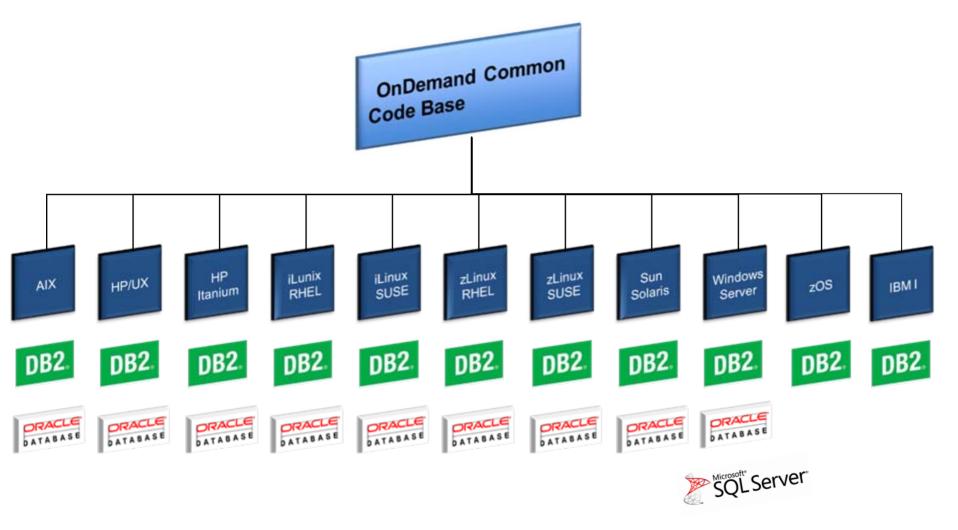


Photos

#### © 2011 IBM Corporation

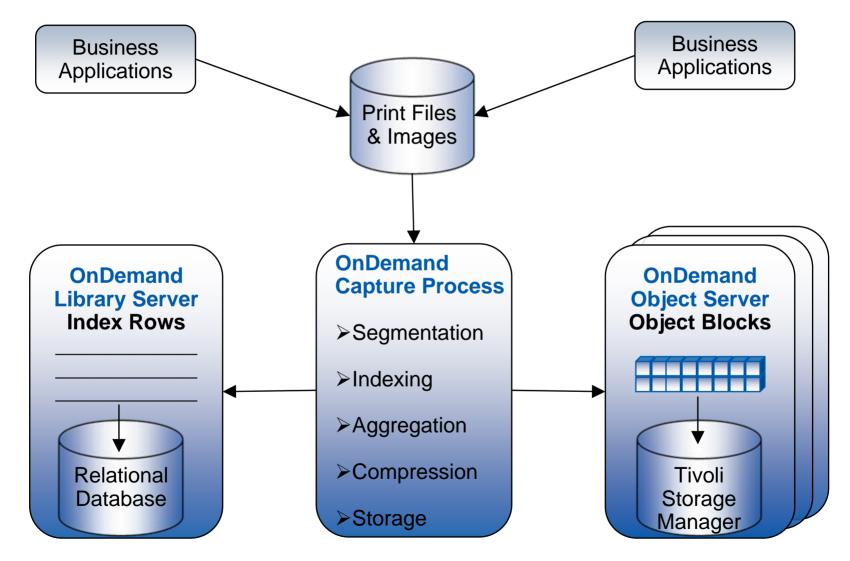


### **OnDemand Platform and Database Support**





### **OnDemand Architecture**



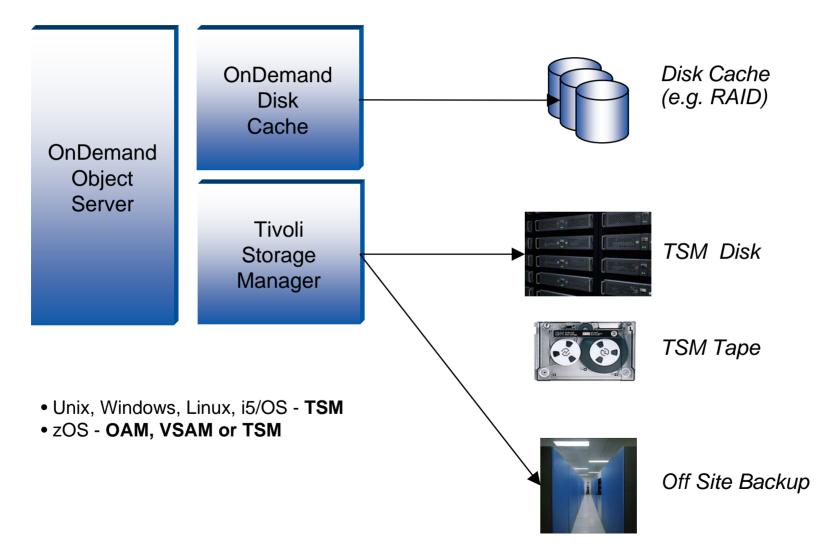


### **Compression and Optimizing PDF file storage**

- -Typical compression ratios of 8:1 to 30:1
- -AFP resources stored once
- -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.



### **OnDemand Storage Management, Expiration and HSM**



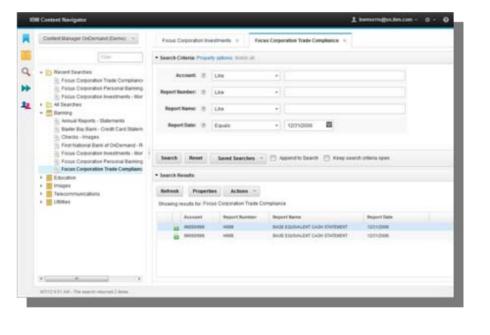


### **Searching for Data**

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### **Content Navigator search - CMOD**

- 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 critera
  - 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.





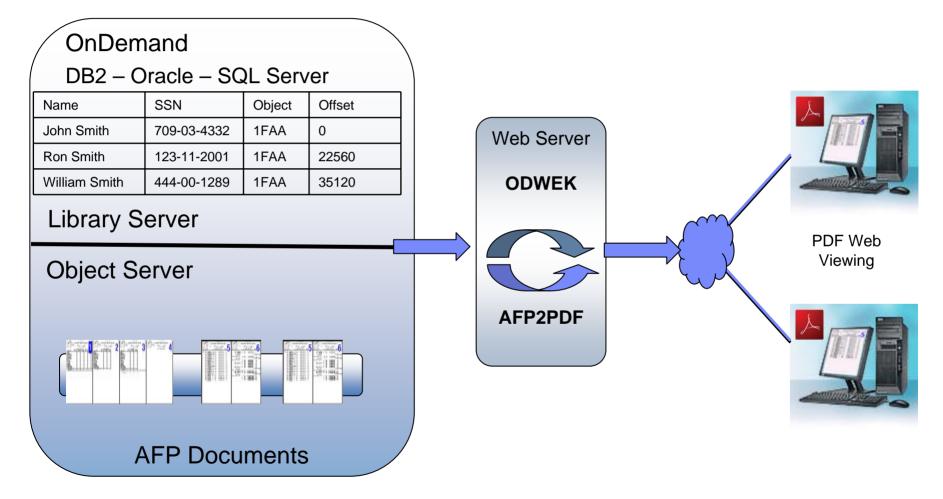
#### IBM Software Solutions - Enterprise Content Management Software



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### Publishing Documents on the Web (Store in native format and dynamically convert)





### **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 multidimensional cube-based analysis tool
- XML enable reports



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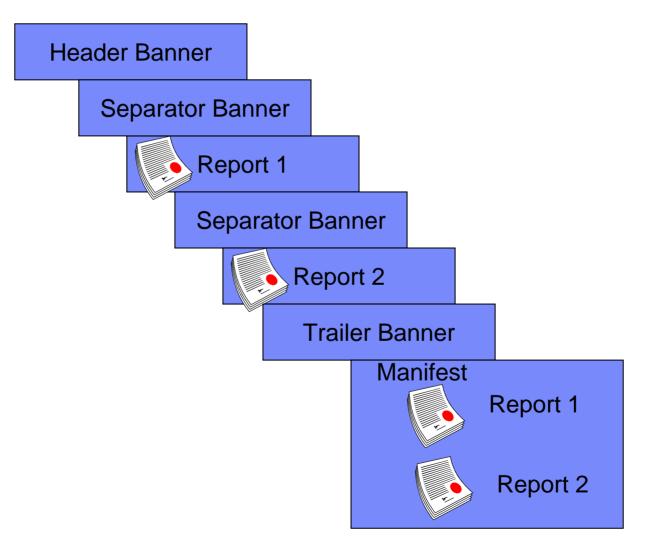


### **Report Distribution Overview**

- -an easy way to automatically group reports and portions of related reports together
- -an easy way to organize reports
- -the ability to convert the report data into different formats
- -the ability to send the grouped or bundled reports through e-mail to multiple users
- -the ability to make grouped or bundled reports available for printing



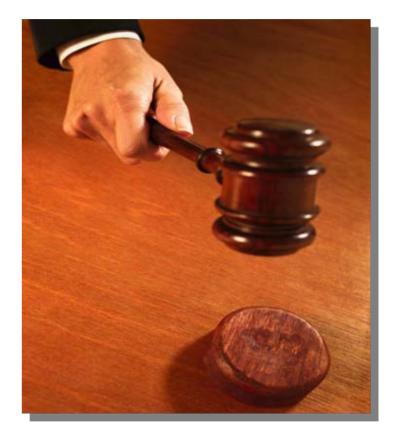
### **Bundle Example**





# **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





### **OnDemand Holds**

- OnDemand supports putting documents on hold through the Windows and Navigator clients
  - Based on a Hold Reason (e.g. legal case name)
- Holds do not change or manage expiration, they just prevent document from expiring or being deleted
- Holds are efficient for large numbers of documents
- A single document can be in multiple holds
- Implied hold enables management of document retention by an external system

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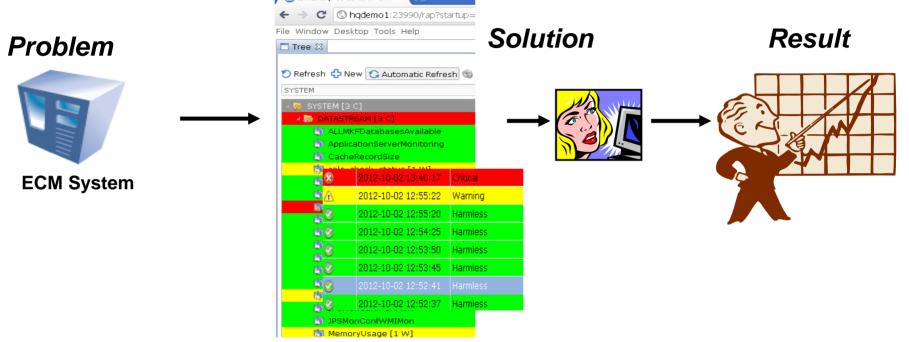
### IBM ECM System Monitor Improve Availability / Lower TCO of IBM ECM

- Proactive monitoring of IBM ECM platforms → functional ECM health monitoring
  - -IBM ECM components
  - -Middleware components, e.g. database & application servers
  - -Input & Output Management
  - -Custom monitoring for add-on applications (3rd party & custom-built)

- Holistic ECM Service Level Management
  - -Simple Red / Yellow / Green traffic light paradigm
  - -IT Service Management (ITSM) integration
    - Event forwarding to central Event Management (IT Operations)
    - Trouble Ticket opening in Incident Management (Service Desk)



# IBM ECM System Monitor Automates the Management of your CMOD Platform



1. Database error prevents document access

2. System Monitor identifies error, alerts Administrator who instantly solves the problem with the built in knowledge base, or SysMon can auto correct the outage



3. Increased uptime, meeting your SLA, satisfied users





### **IBM ECM System Monitor Capabilities**

#### • Proactive monitoring and logfile management

- 1800+ performance & system parameters
- 900+ RPC level Listener metrics
- 28+ ECM logfiles
- JMX for Webserver and WMI object interface
- Real-time alerts via Blackberry, pager, email, console, SMS
- InstallAnywhere support
- Automation of manual administration tasks
- Seamless integration with enterprise system mgmt. tools
  - Pre-defined SNMP MIB
  - Logfile
  - Email / Command Line
  - Direct API Integration into IBM Tivoli and HP OpenView
- New Management reports and enhanced knowledge base
  - Analysis of historical events identifying weak spots
  - Analysis of resource utilization trending and capacity planning



# What's New

### **OnDemand Release Summary**

2007	2008	2009	2010	2011	2012
OnDemand MP 8.4.0 •ODWA •64-bit addressing space on Linux <sup>™</sup> , 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 OnDemand zOS 8.4.0 •Define DB2® database information	OnDemand MP 8.4.1 •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 OnDemand i5 6.1 •IASPs for archived data and the location of new instances. •Support for TSM as a storage level •Batch Administration	OnDemand zOS 8.4.1 •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	OnDemand i5 7.1 •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 OnDemand MP 8.5.0 •Unicode support •Multiple language folder field names •64-Bit Windows Server •SSL support between OnDemand client and server	OnDemand zOS 8.5.0 •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 ODFfrom the OnDemand Windows Administrator.	OnDemand 9.0 MP and z •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 OnDemand i5 7.1 Refresh •Unicode support
•Exploitation of 64-bit addressing space on	•WEBi •Change life of		•FIPS 140-2 •DECFLOAT in DB2		folder field names •64-Bit Windows
Linux™, AIX®, HP-UX, and Solaris platforms, •Expanded database support for Oracle 10g	cached data retroactively •Single table creation for an application		•Multiple TSM servers from the same Object Server		Server •SSL support between OnDemand client and server

•FIPS 140-2

Server

•DECFLOAT in DB2

•Multiple TSM servers from the same Object

Release 2 and IBM

•AFP<sup>™</sup> transforms

DB2 Universal

Database® V9

group.



# **Content Manager OnDemand 9.0 Content**

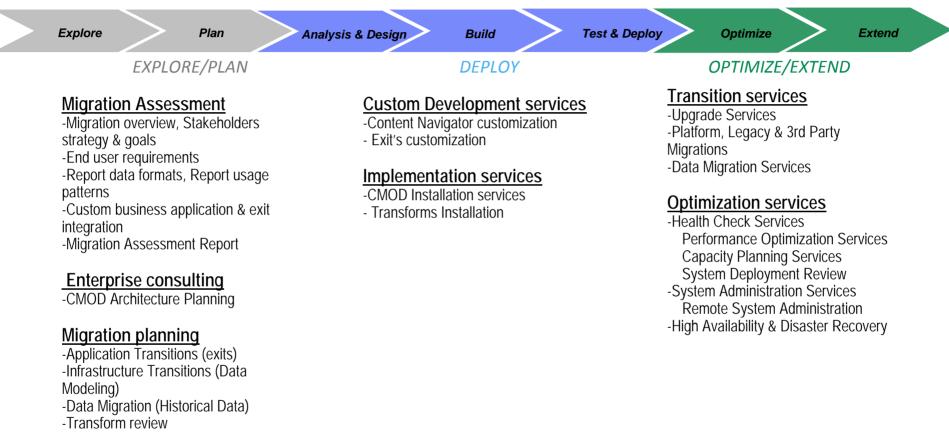
- Capability
  - Full Text Search
  - Content Navigator Support
  - ECM Dashboard and FSM integration
  - Export to .csv formats
  - CMIS Read-Only support.
  - OS/390 Indexer for AIX
- Security
  - User proxy
  - Last login
  - Password limits/restrictions
  - OnDemand Stash file
- Performance
  - Report Distribution improvements

- Usability
  - Database timestamp support
  - Support for 128 metadata fields
  - Adding field(s) to existing folder definition
  - Graphical annotation support with ODWEK line data applet
  - Enhanced metadata update
  - Enhanced upgrade process, which allows for easier backout
- Utility
  - Arsafpd utility
  - PDF Floating Triggers
  - zOS Installation Wizard
  - Java ODWEK API enhancements



### **Content Manager On Demand - Lab Services**

Doyle Wilson – Practice Manager doylew@us.ibm.com





# **Additional Information**

• OnDemand Info Center

http://pic.dhe.ibm.com/infocenter/cmod/v9r0m0/index.jsp?topic=%2Fcom.ibm.ondemand.doc%2Fic-homepage.html

- Get started
  - Information Management Lifecycles
  - What's new in IBM Content Manager OnDemand for Multiplatforms Version 9.0
  - What's new in IBM Content Manager OnDemand for z/OS Version 9.0
  - What's new in IBM Content Manager OnDemand for i Version 7.1
  - What's new in the IBM Content Navigator
  - <u>Content Manager OnDemand for Multiplatforms Version 9.0 System requirements matrix</u>
  - Content Manager OnDemand for z/OS Version 9.0 System requirements document
  - <u>Content Manager OnDemand for i Version 7.1 System requirements matrix</u>
  - Compatibility matrix for the Content Manager OnDemand clients and servers
  - Upgrade Guide for Content Manager OnDemand Servers
- Perform common tasks
  - <u>Planning</u>
  - Installing
  - Administering
  - Installing and implementing ODWEK
- Resolve problems
  - Steps for troubleshooting



# **Additional Information**

- -CMOD Main Page:
- http://www-01.ibm.com/software/ecm/ondemand/
- -Content Manager OnDemand Conversion Services
- ftp://ftp.software.ibm.com/software//data/swlibrary/services/ECM\_Content\_Manager\_OnDemand\_Conver sion\_Services.pdf
- -ODUG (OnDemand Users Group)
- http://odusergroup.org/

IBM Software Solutions - Enterprise Content Management Software



