IBM Content Manager OnDemand (CMOD)

Enterprise Content Management

Louise Hawley

Agenda

•Introduction to Content Manager OnDemand (CMOD)

•New Announcement

•CMOD product demo

•Q&A

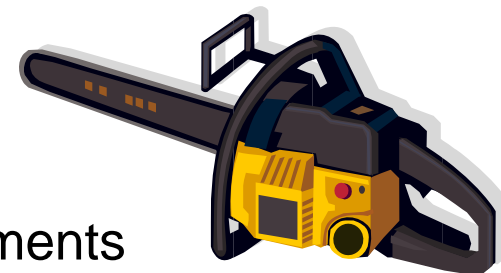# Confused about Enterprise Content Management?

Difference in Repositories

- There is a reason that ***Report Management Repositories*** are different to ***Content Management Repositories***
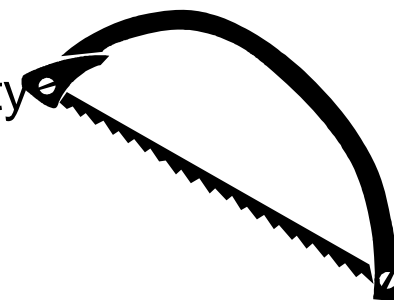
  → Report Management
    - Optimized for large "loads" of many, many similar documents
    - Static in nature; read-only (e.g. computer reports)

  → 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*
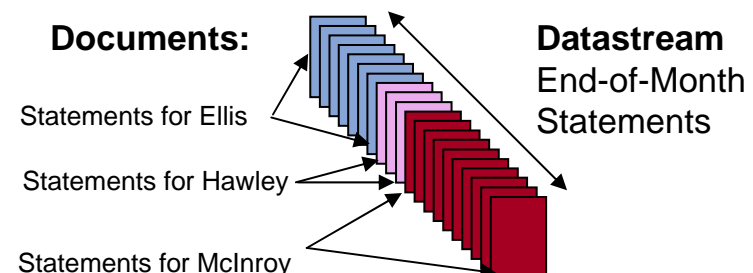
Content/Image versus Archive

P8 & CM8

- Work in progress
- Content/Image System
- Paper intensive
- Individual documents
  - → Word
  - → Scanned
  - → Fax
- Document management
- Creation
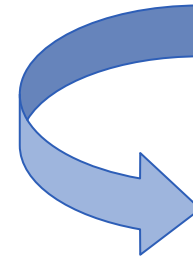- Documents loaded one at a time
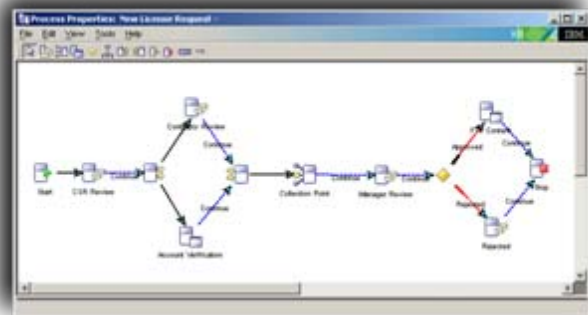
CMOD

- 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

Documents:

Statements for Ellis

Statements for Hawley

Statements for McInroy

Datastream
End-of-Month
Statements

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
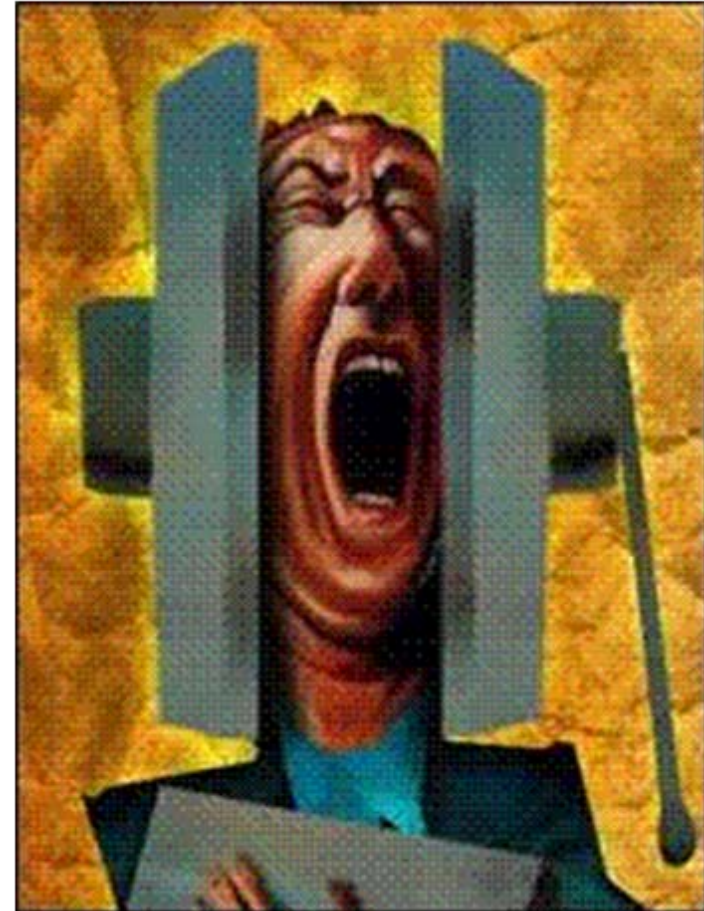
Common business problems

Uses for Content Manager OnDemand

- e-Statement Presentment

  → Front office application

    ◆ Presenting of customer data in customer service environments
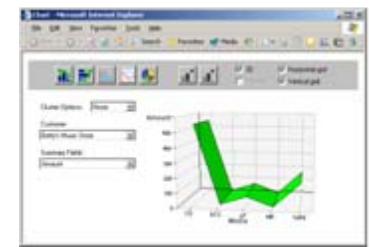
    ◆ Self Service or call centers
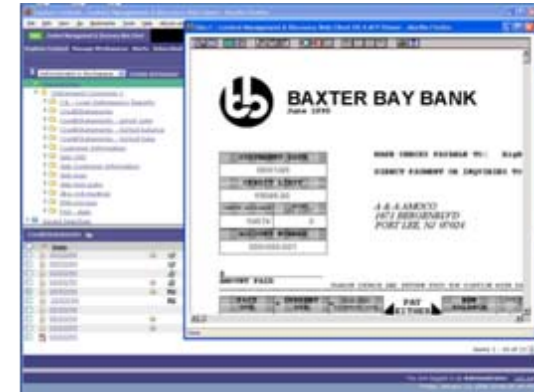
- e-Report Management

  → 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
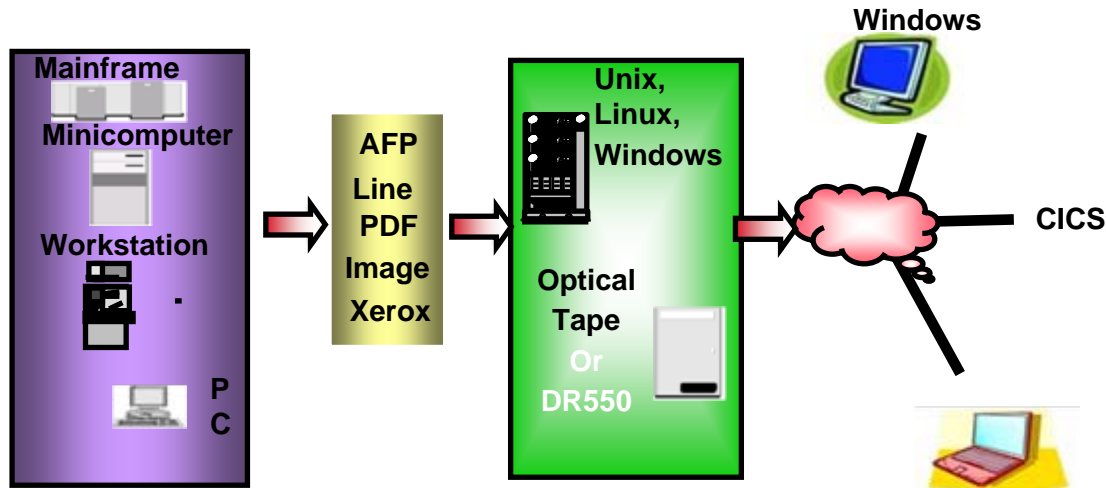   – Report Mining
    – Analysis

CMOD Sets New Benchmark

Over 200 Billion objects archived

Over 2 Billion retrievals every day
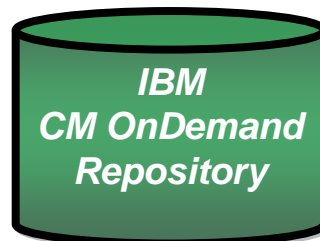
Over 20 Petabytes of data

OnDemand Architecture

Mainframe

Minicomputer

Workstation

.

P C

AFP
Line
PDF
Image
Xerox

Unix,
Linux,
Windows

Optical
Tape

Or
DR550

Windows

CICS

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

Clients
IBM WEBI,
Windows Desktop Client
CICS/3270
CGI, Servlets, Java, DDE
and OLE API's

Databases
DB2, Oracle, Microsoft SQL
Server

IBM
CM OnDemand
Repository

CMOD Library and Object Servers
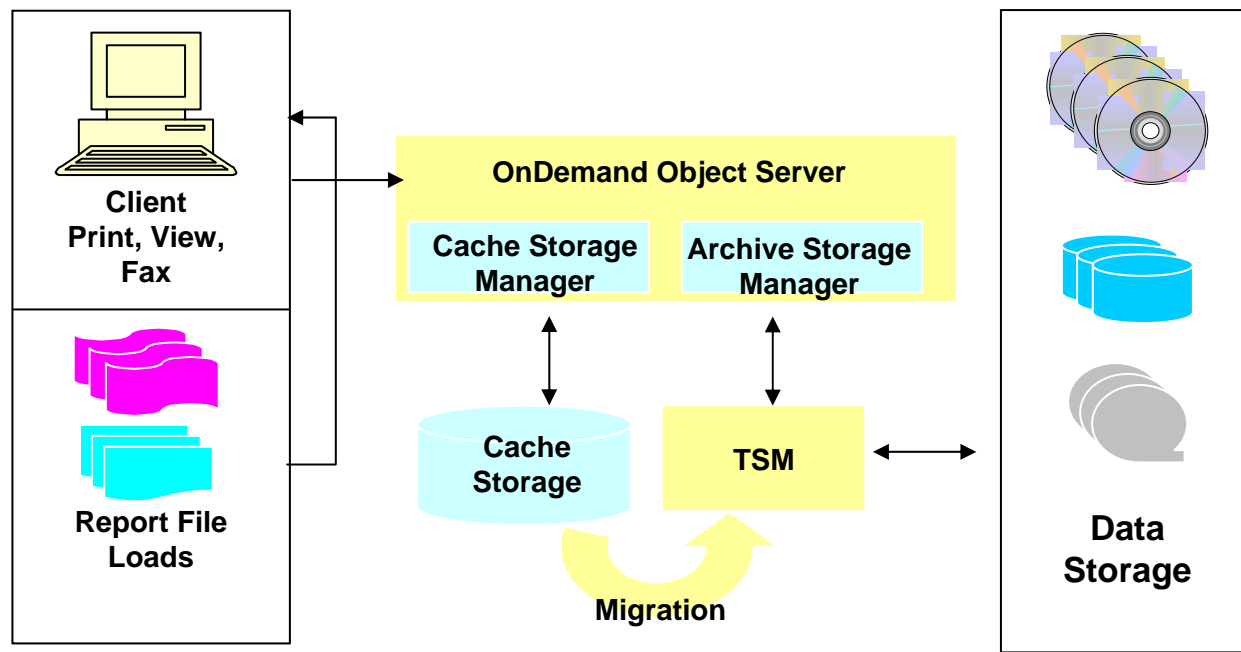
Library Server

- 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
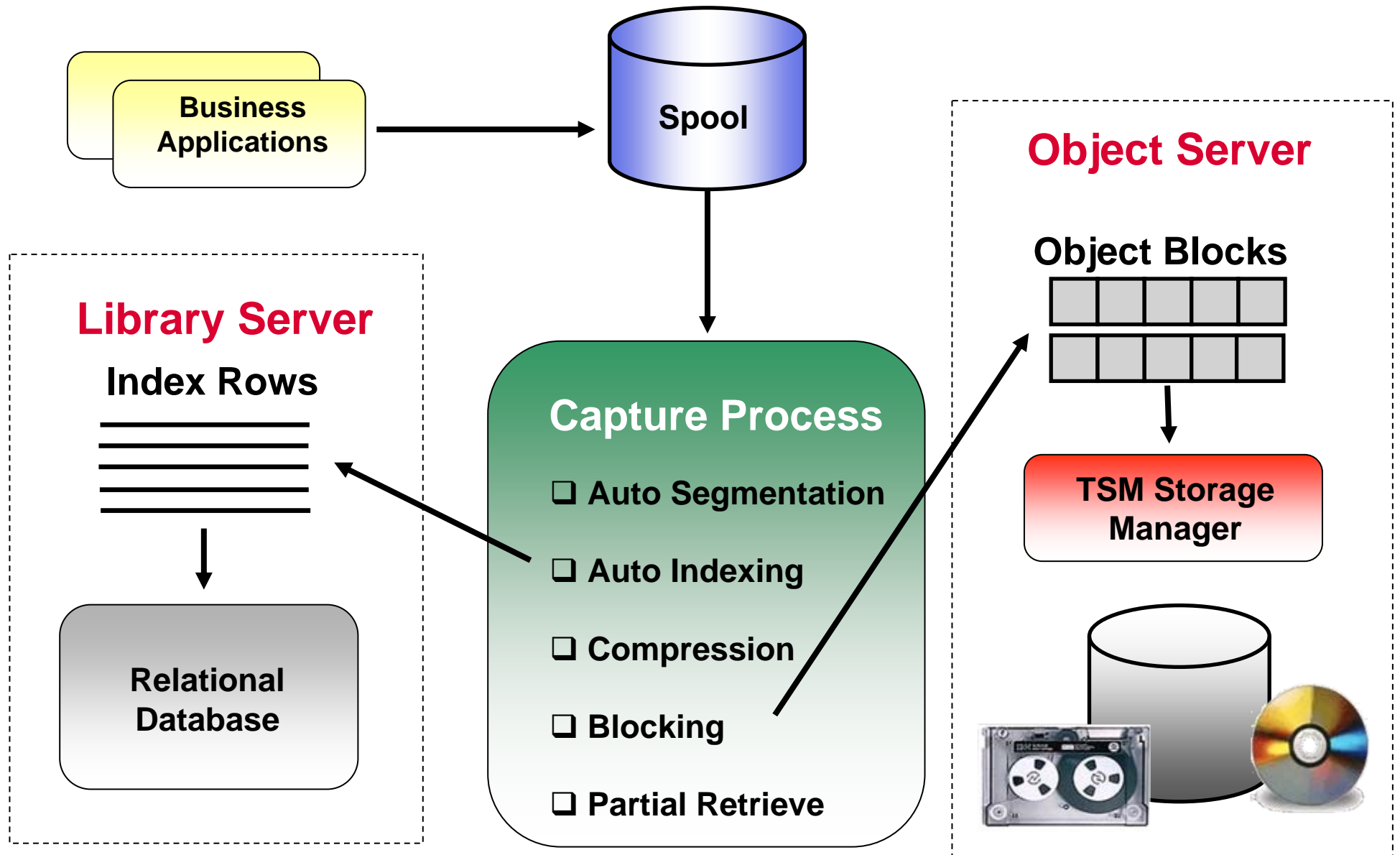
Object Server

- 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
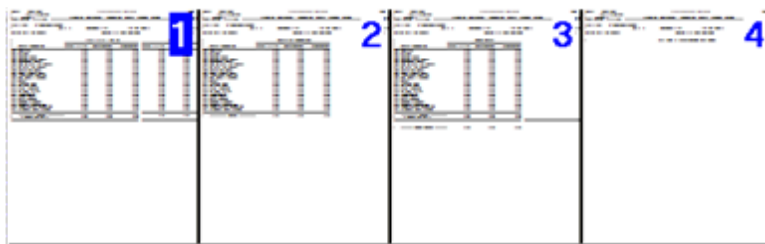
OnDemand Storage Management
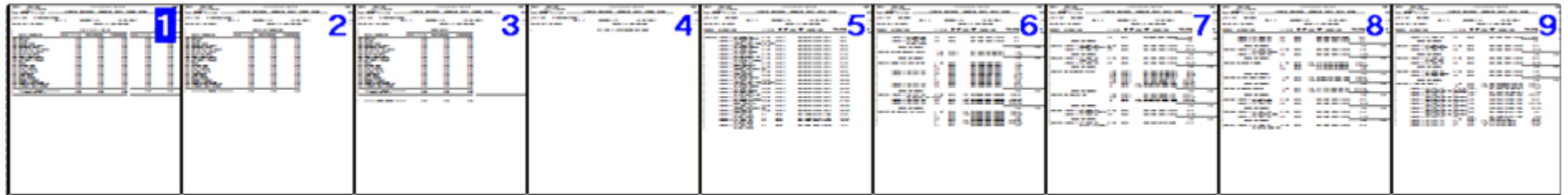
- Allows **mixture** of magnetic, RAID, optical and tape

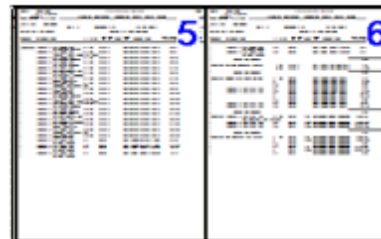- Automatic **migration** and **expiration** of documents based on report type

Client Print, View, Fax

Report File Loads

OnDemand Object Server

Cache Storage Manager

Archive Storage Manager

Cache Storage

TSM

Migration

Data Storage

OnDemand Document Capture

Business Applications

Spool

Object Server

Object Blocks

Library Server

Index Rows

Capture Process

❑ Auto Segmentation

❑ Auto Indexing

❑ Compression

❑ Blocking

❑ Partial Retrieve

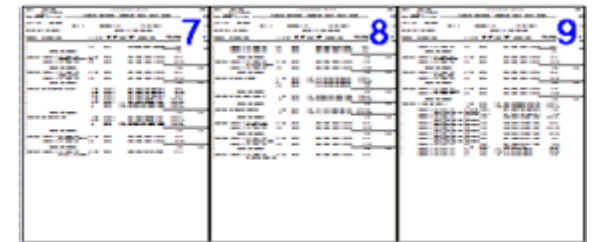**TSM Storage Manager**

Relational Database

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
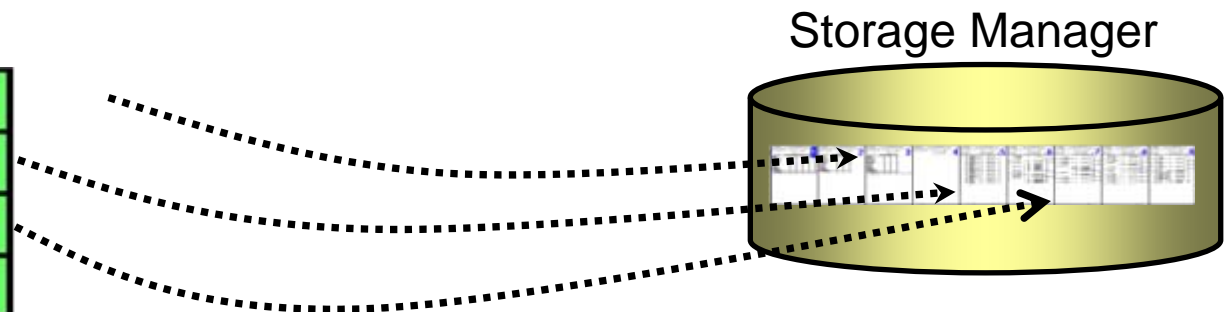
Content Manager OnDemand v8.4.1

- 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
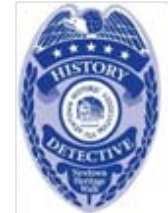
- Integration with IBM P8

  → 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

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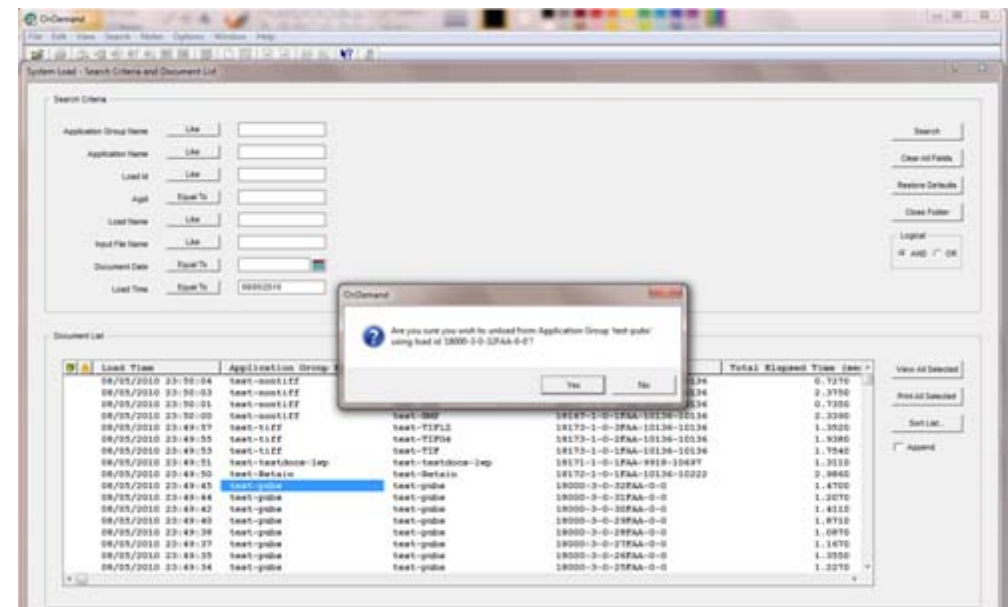
Eliminates manual command line steps and the need to remember long Load IDs. Huge usability and manageability benefits.

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
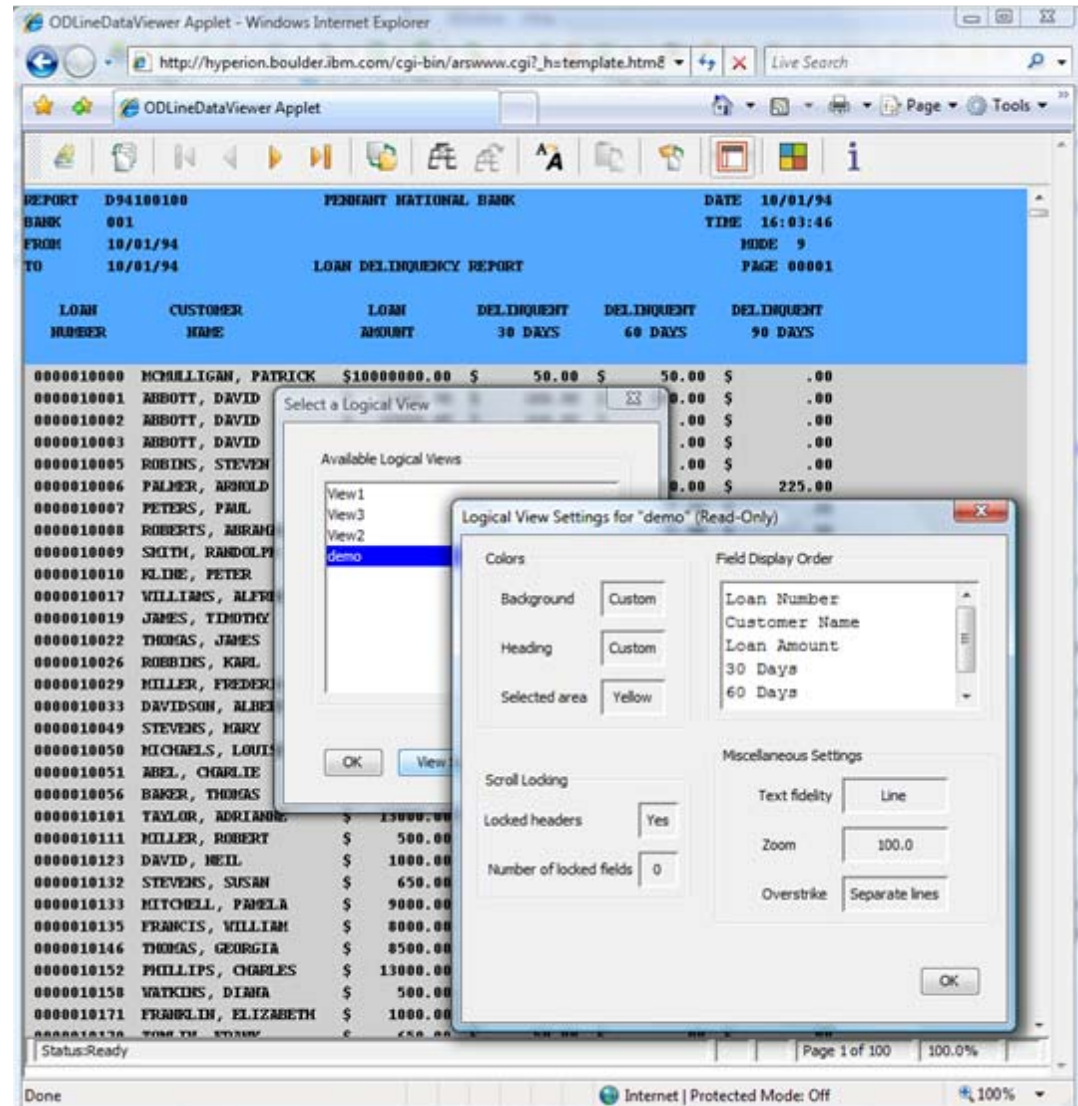
Print Line Count

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

- Before   After

Improves manageability of documents

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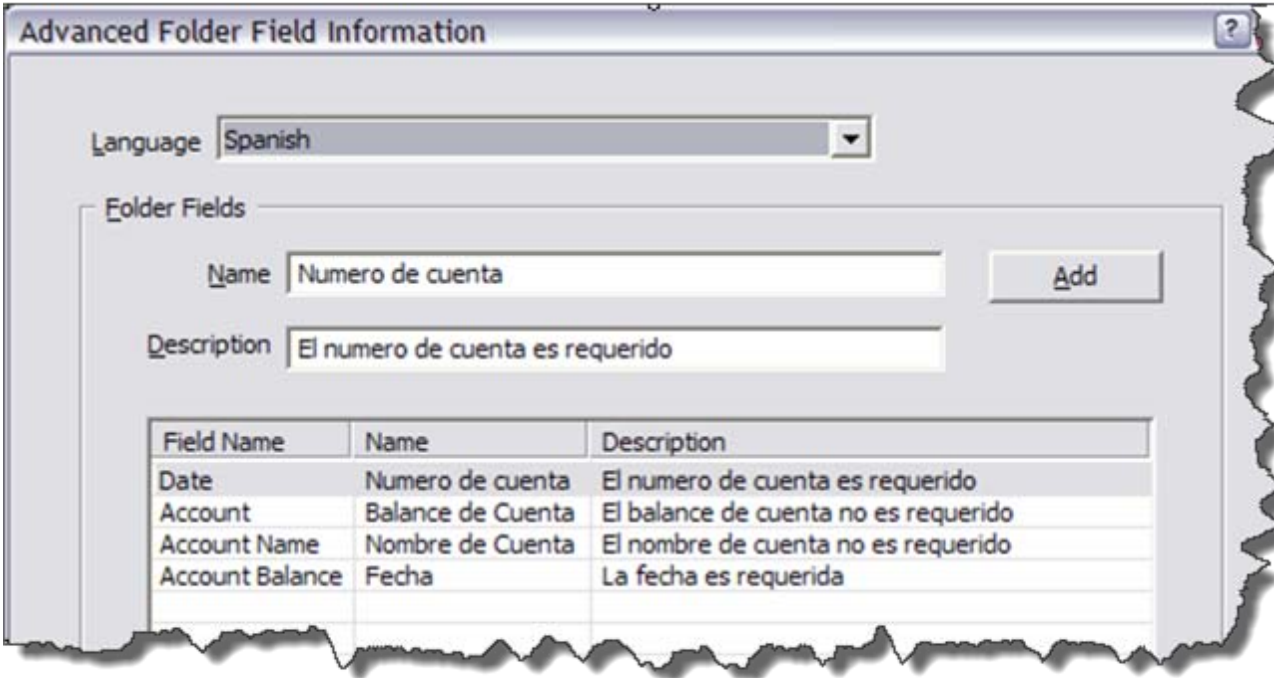
- Create a list of applications that are included in a specific folder

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

- Create a list of folders that include a specific application
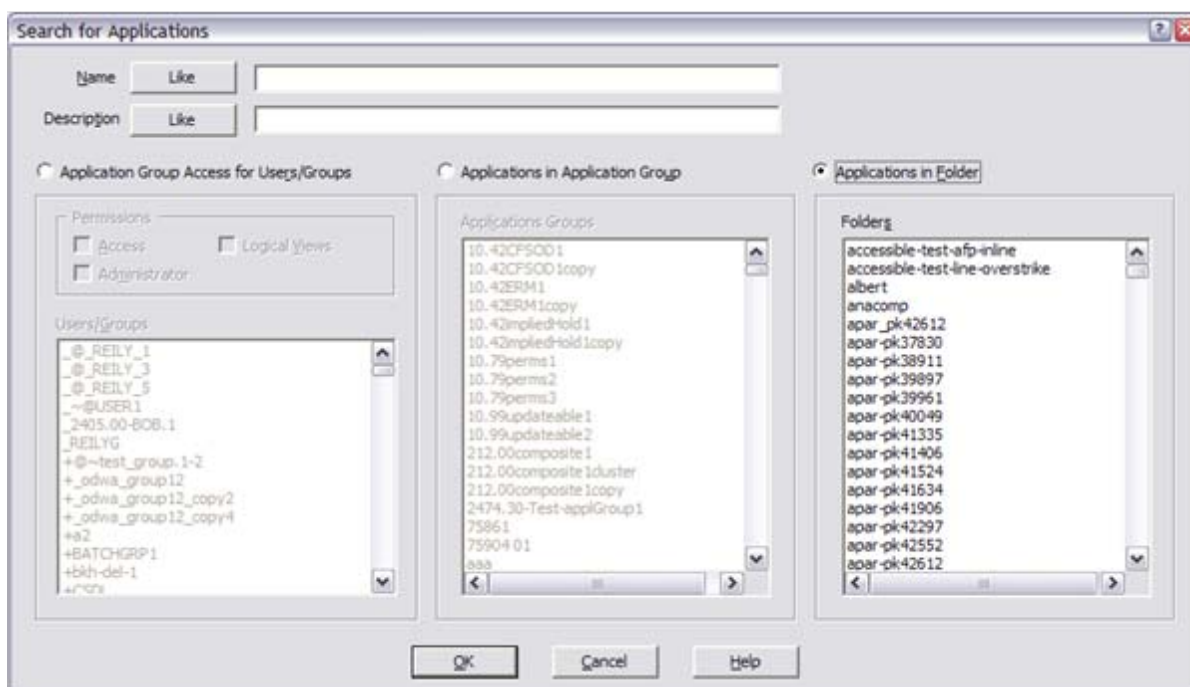
Increases productivity for OnDemand Administrators

Folders – Multiple Languages

- Multiple language folder field names for Win32 client

> 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
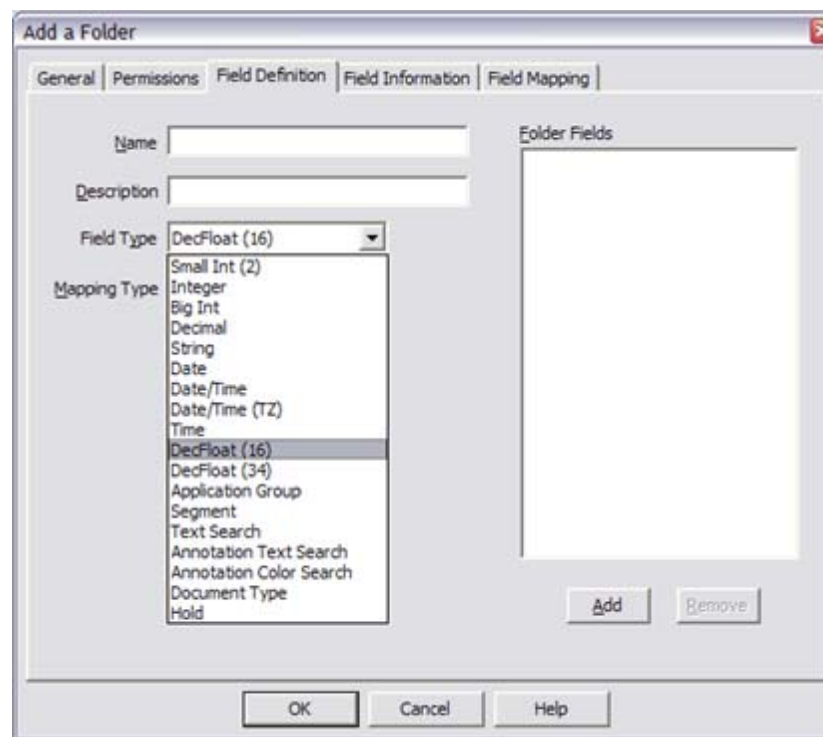
Desirable for financial services customers or any customer processing financial information

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
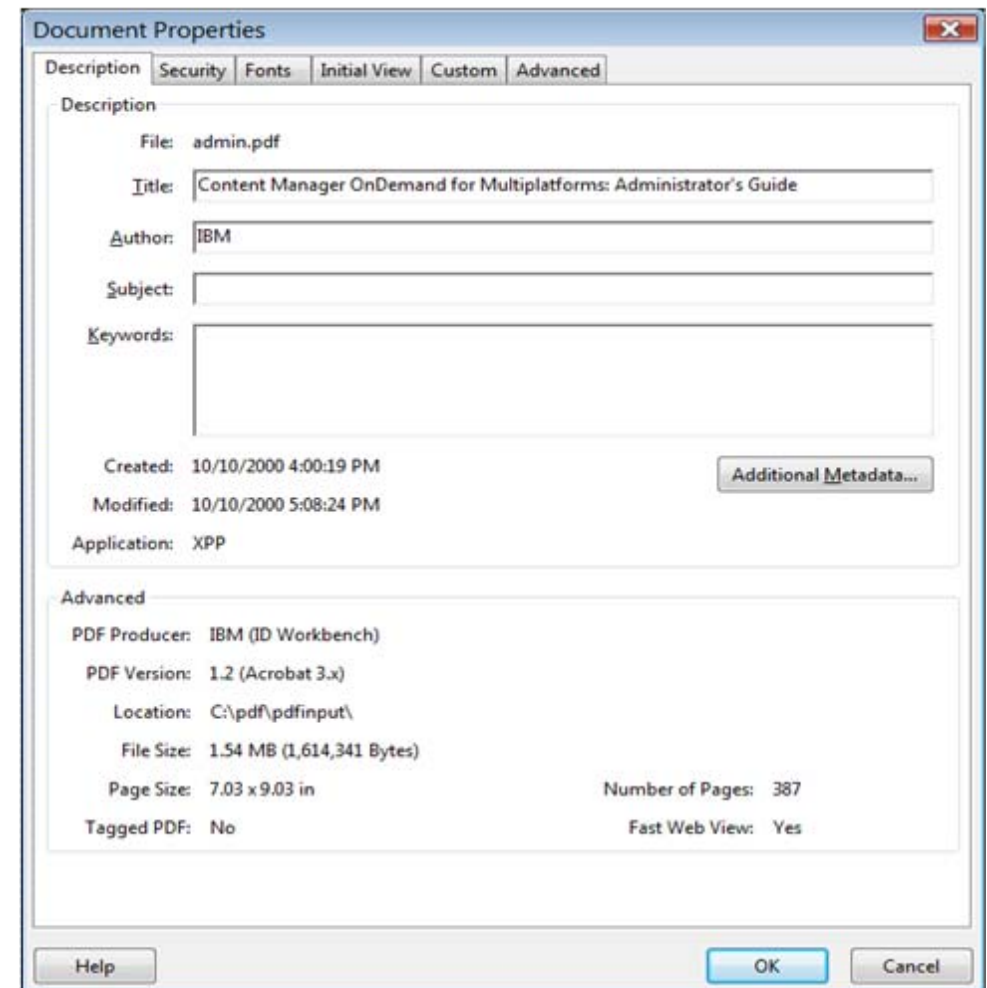
Provides additional PDF indexing capabilities and flexibility

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 <u>any</u> 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, confirms 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