



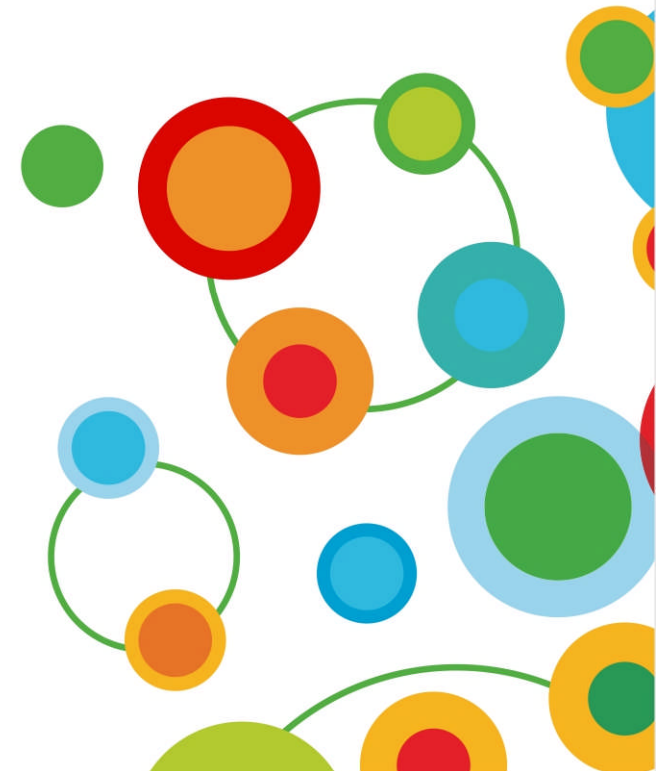
IBM Software

Information Management & Analytics Forum **2013**

Return on Information: The New ROI

Eliminate Paper- Cut Costs, Go Green

Harpreet S Dhariwal
Enterprise Content Management
IBM India



Agenda

- ✓ Introduction
 - ✓ Paperless Office – Some Facts
 - ✓ Paper Impact on Operations and Profits
- ✓ How to Eliminate Paper
- ✓ Production Imaging Edition – Introduction
- ✓ Production Imaging Edition – Key Capabilities
- ✓ Starting Points
- ✓ Q & A

The realities of the 'paperless office'

- High Percentage of Business Information
- Growing Costs
 - Operational
 - Risk
 - Governance
- Inconsistent Business Practices



Paper impact on operations and profits

27% – Paper Growth

53% - Imaging Investments

14% - Cross Department Initiatives

% of companies

Source: AIIM Industry Watch, Capture & Business Process, Dec 2010



Eliminating Paper



Integrated Solution Capabilities

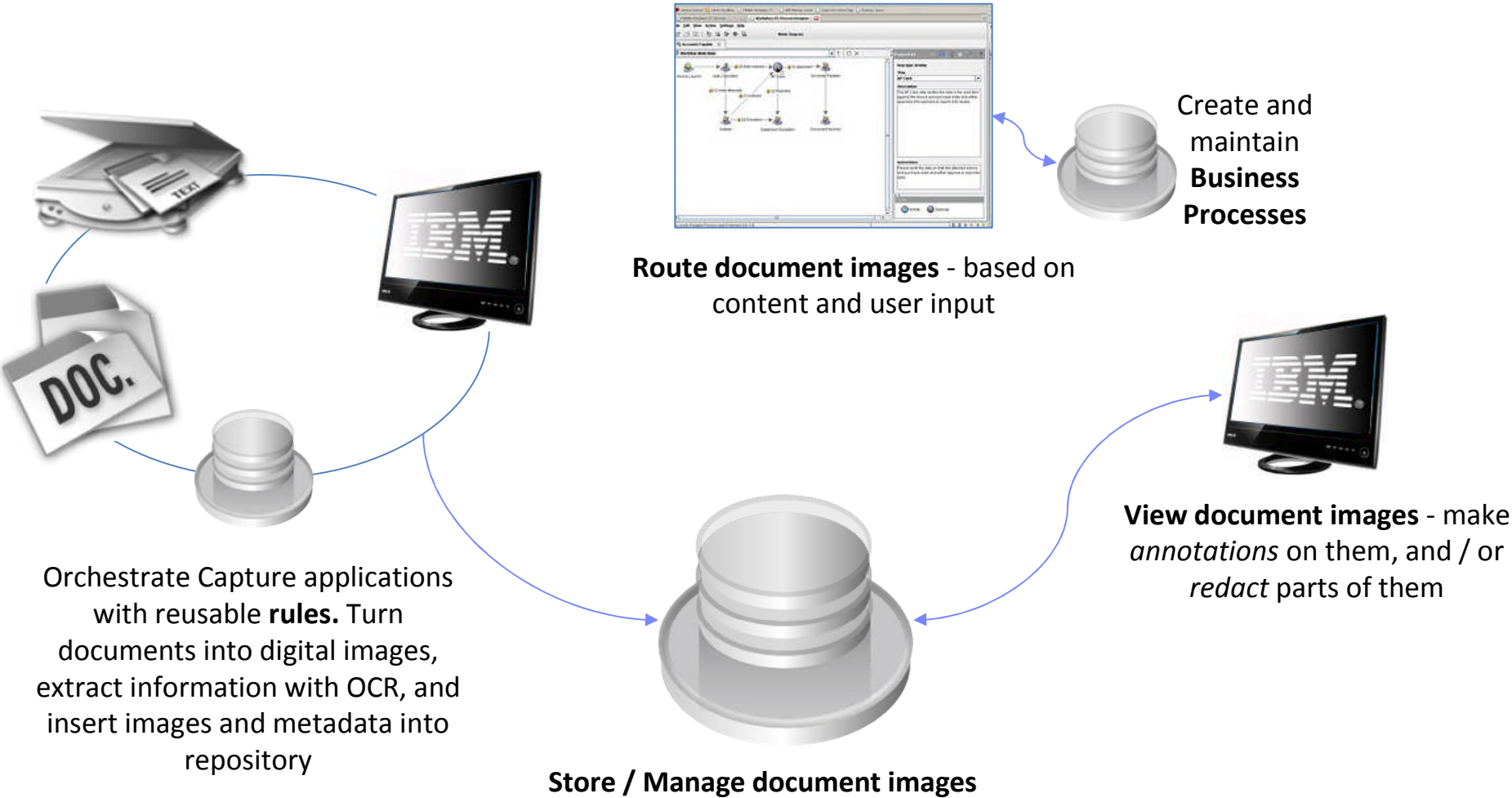
Capturing Paper

Managing the Captured Paper

Viewing the Captured Paper

Putting the Captured Paper in Motion

Eliminating Paper



The PIE



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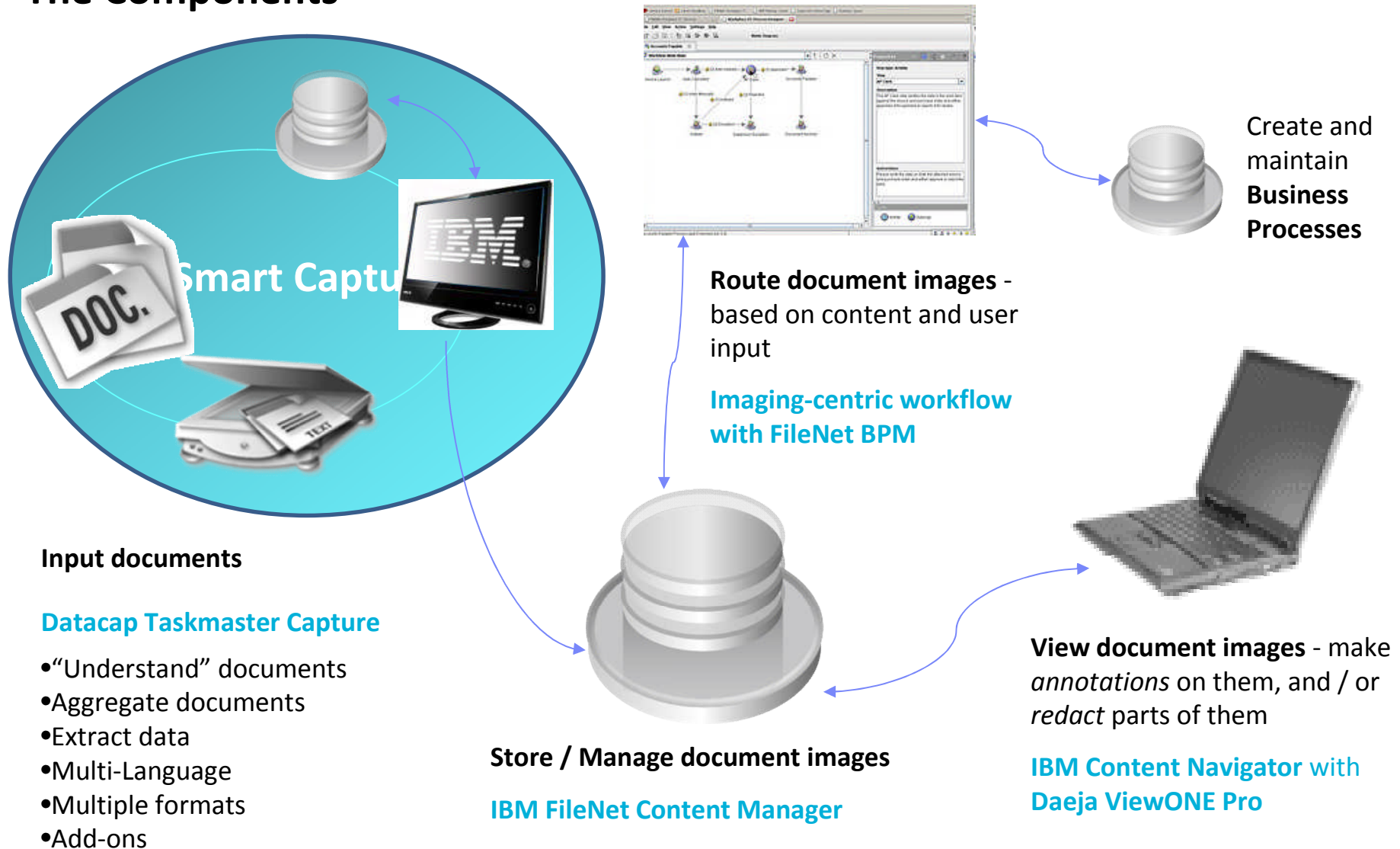
Production Imaging Edition?

- PIE integrates together state-of-the-industry imaging solutions to enable sophisticated document process automation.
 - **Input – multi-channel, central and distributed**
 - **Storage, retrieval, compliance, disposal**
 - **Workflow –view, process, collaborate**



Production Imaging Edition

The Components



Production Imaging Edition: Smarter Capture

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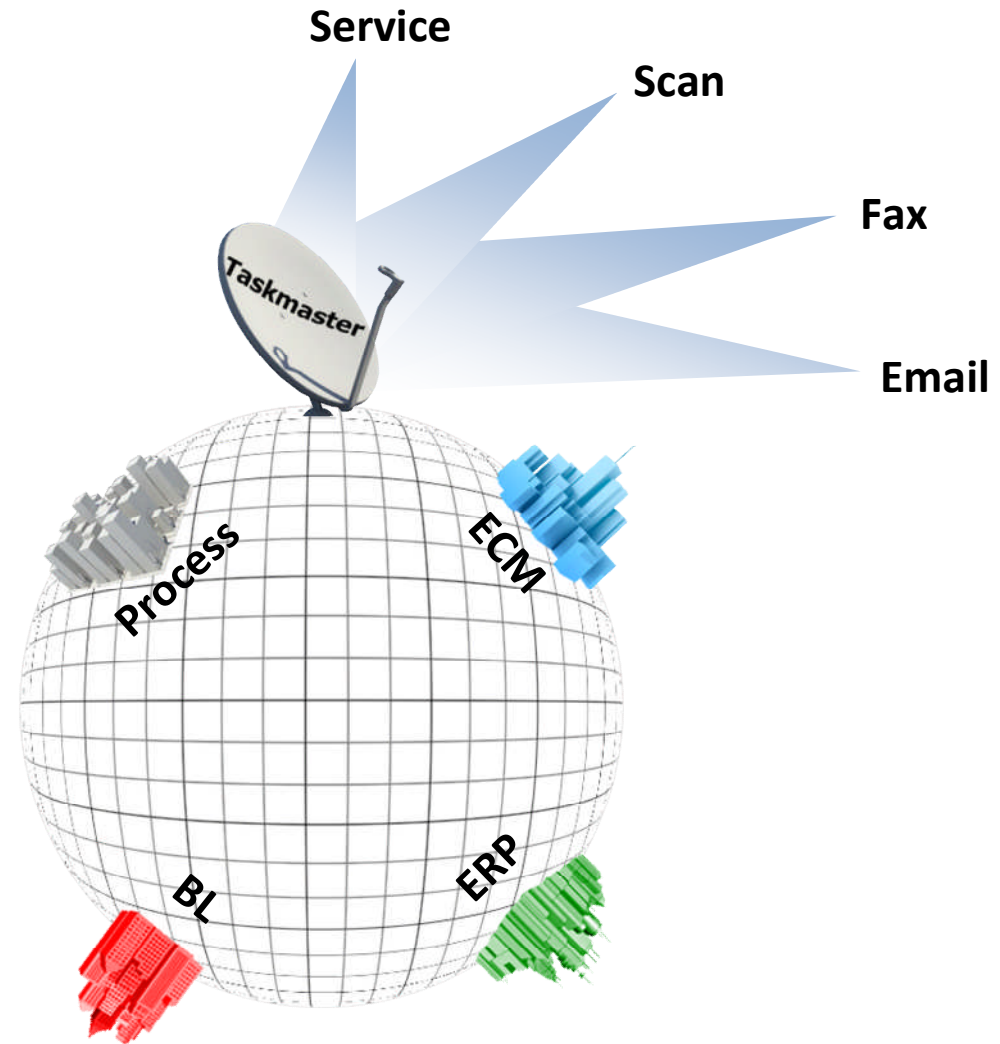
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10

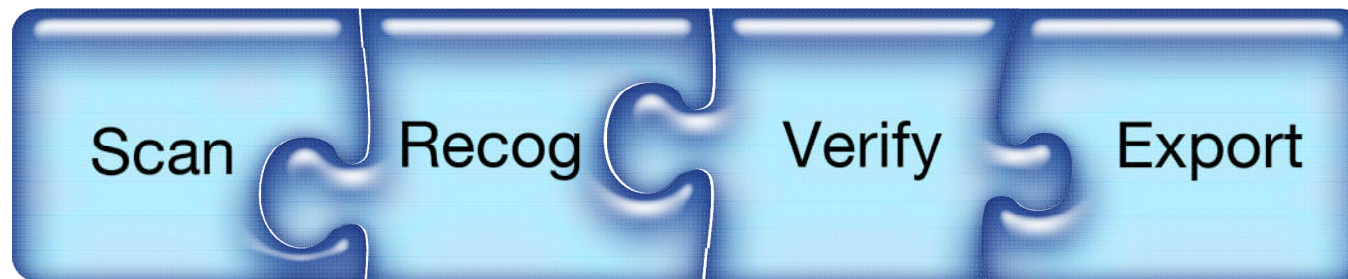


The Big Picture for Capture

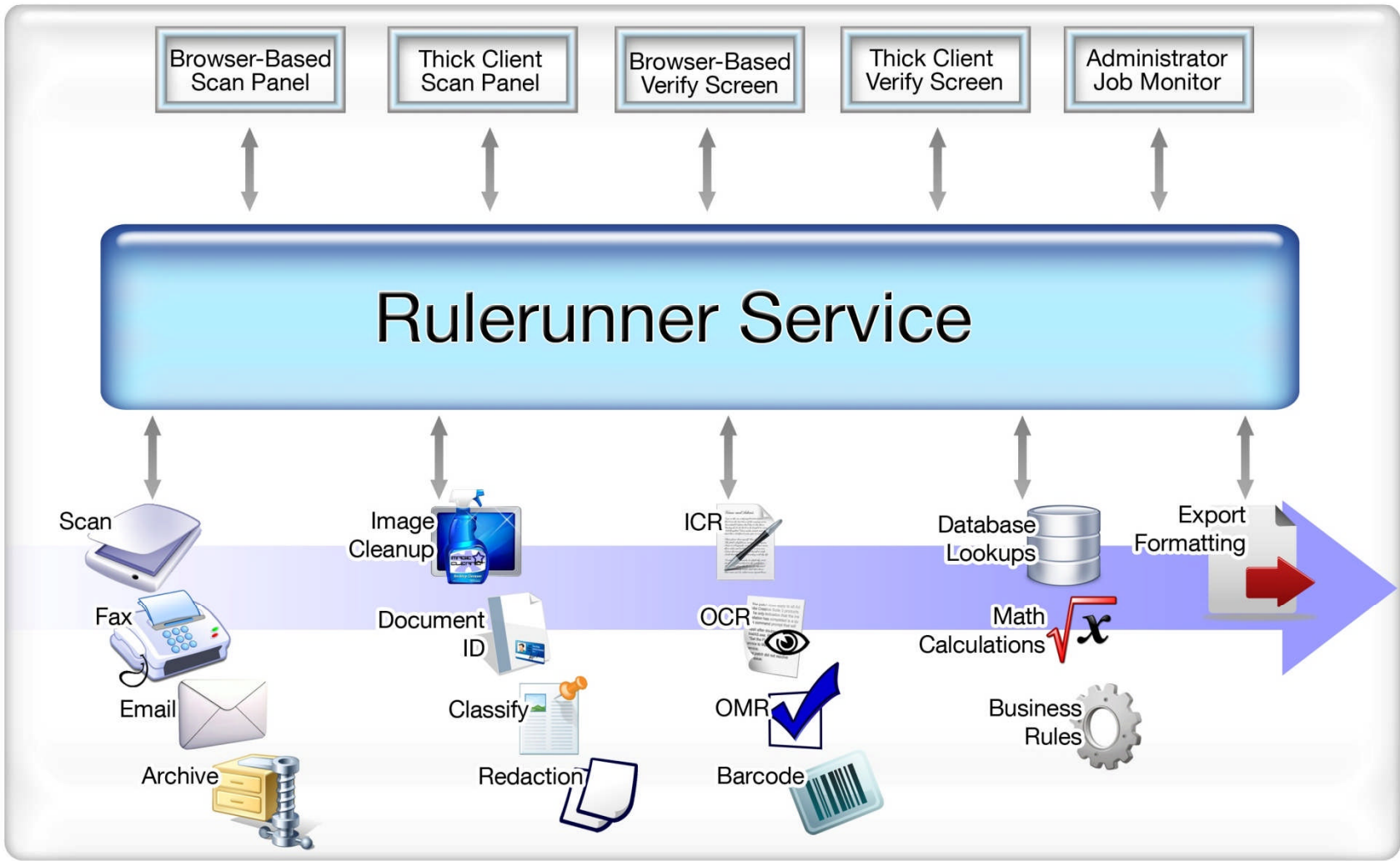
Aggregation



Problem: Traditional Capture Process is Inflexible



- Accounts Payable
- Claims Processing
- Healthcare
- Insurance
- Government
- Financial Services
- Transportation
- Manufacturing



Rule Based Engine The Difference

The screenshot displays the Datacap Studio interface with several panels:

- Document hierarchy:** Shows a tree view of tax return documents. A box highlights the 'Tax Year' folder, which contains an 'Open' action with the configuration 'Validate : Rule: Tax Year'.
- Rulesets:** Shows a tree view of global rulesets. A box highlights the 'Rule: Tax Year' rule, which contains a 'Function1' with the following conditions:
 - Status_Preserve_OFF ()
 - IsFieldPercentNumeric ("100")
 - IsFieldLengthMax ("4")
 - IsFieldLengthMin ("4")
 - IsFieldGreaterOrEqual ("1999")
 - IsFieldLessOrEqual ("2003")
- Actions library:** Lists various actions such as 'icr_p', 'ImageConvert', 'AppendAllImages', etc.
- Actions library reference:** A dialog box showing details for the 'ImageConvert.SetTIFFCompression' action. It includes the following information:
 - Syntax:** `bool SetTIFFCompression (StrParam)`
 - Parameters:** A list of values for the StrParam: 0: No compression, 1: Run length encoding (RLE), 2: CCITT Group 3 fax compression, 3: CCITT Group 4 fax compression, 4: LZW compression, 5: Apple Macintosh PackBits compression, 6: JPEG compression format, 7: Lossless compression standard derived from LZ77, 8: CCITT Group 3 two-dimensional standard fax compression.
 - Returns:** Always True.
 - Level:** All levels.

Configurable User Experience

APT | Demo.Verify on batch 20130131.000000 - Taskmaster DotEdit

Progress Snippets Image Display Exceptions

Next LC Submit Previous Page Next Problem Prev Image Next Image Document Images Batch Structure Hide Toolbar Run Validations

Index Navigate Document View Profiles

Find Details Calculate Blank POLR Sticky

POLR: 2 unmatched line item(s).

Postal Code Invoice_Number
94205 2041955

Vendor Vendor_Number
 Stuart Apothecary TS71288

Invoice_Date PO_Number Shipping Tax Total Invoice_Total
8/17/2011 342033 123.45 0.00 2755.44

2011/08/17 342033 123.45 0.00 2755.44

Invoice_Type
 PO

Tax_Type Tax_Value
 Sales VAT GST

Add_New_Fingerprint
 Routing_Instructions
 None

Insert Append Delete

ItemID	ItemDesc	Qty	Price	LineTotal	POLineNum
3332223	Deluxe First Aid Kit	3	129.89	389.67	10
6423216	100 pack paper cups - 4oz	45	7.23	325.35	
8738224	Stainless Steel Tape Dispensers	5	19.55	97.75	30
3734353	1000 Count Aspirin - 100mg	3	8.26	24.78	40
8534554	Rolls Gauze Bandage - 4 inch	17	2.16	36.72	50
4334522	Rolls Gauze Bandage - 3 inch	17	1.99	33.83	60

Image View
 tm000008.tif
 Sacramento, CA 94203
 (916) 555-3333

Invoice Number: 2041955
 Invoice Date: 8/17/2011
 PO Number: **342033**
 Terms: Net 30

Page 1 of 2

Item Number	Price	Extended
3332223	129.89	389.67
6423216	7.23	325.35
8738224	19.55	97.75
3734353	8.26	24.78
8534554	2.16	36.72
4334522	1.99	33.83

Batch 20130131.000000 Document 20130131.000000.08 8(8) Image TM000008 1(2)

3:53 AM 2/4/2013

Production Imaging Edition: Managing Content

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Enterprise Content Management

Core Capabilities

- **Scalability – Extreme (200 TB + and counting)**
- **Reliability – (Fortune 500 Users)**
- **Availability –(Supports Load Balancing, Clusters)**
- **Manageability – (Centrally Monitored and Managed)**
- **Configurable User Experience**

Configurable User Experience

IBM Enterprise Content Management

Search shussey

Focus Corp Teamspaces

Focus Corp Teamspaces

- Templates
- Working

Refresh Add Document New Folder Check In Check Out

Properties Actions

Name	Mejo
Templates	
Working	
Corporate Participation	
Earth Day Brochures	
Earth Day Fund Raisers	
IndustrySolutions Presentation Template	
Kids Tree Planting	
Pakcake Celebration	

Properties

Folder Name: Templates

System Properties

Verizon 2:08 AM 27%

Back Nonnenkamp

- Favorites
- Browse
- Search
- IBM Case Manager
- Capture
- ATL FastStart

Viewer

Sample Invoice.tiff Scanned Invoice

Sample Invoice.tiff Scanned Invoice

Page 1 of 1...

File Home Insert Page Layout References Mailings Review View IBM Connections IBM ECM

Browse Search Favorites Add Check In Check Out Cancel Checkout View / Modify Properties View / Modify Security Teamspace Browse Search Add Team Tasks Start Process Help About

Open Edit Teamspace Process Resources



FOCUS CORPORATION
1938 HARBOR BOULEVARD
COSTA MESA, CA 90210

Invoice

CUSTOMER INFORMATION

Customer Name	Project Blue
Address	184 Triple Street
City, State, Zip	Las Vegas, NV 92626-1420
Contact	Bill Jones
Telephone	716-398-3409

ORDER INFORMATION

Service/Product Description	Unit Price	Units	Price
Call Center Headsets Model 982	\$75.00	1000	\$75000.00
Call Center Headsets Model 198	\$100.00	20	\$2000.00
Total			\$77000.00

CUSTOMER

By: _____

Date _____

VENDOR

By: _____

Date _____

Browse

- Focus Finance
 - Customer Contracts
 - Demonstration
 - Email
 - Images
 - Invoices
 - Processes
 - Reference material
 - Presentations
 - Templates
 - Valuations
 - Working
- Focus Insurance
 - Claim Reports
 - Default
 - Drafts
 - Photos
 - Policies
 - Teamspace
 - Teamspace Templates
 - Working

Filter by: None

Name	Modified By	Modified On
Processes	istory	11/17/2011
Reference material	P8Admin	10/9/2011
Logo Company In...	smills	9/13/2012
MPS Bid.docx	smills	9/13/2012
Misc Software Inv...	smills	9/13/2012
Project Blue Invoic...	rhowarth	10/19/2011
Sam's Electrical.pdf	smills	9/13/2012
TBA Bids.pdf	smills	9/13/2012

Show Details

Production Imaging Edition: Workflow

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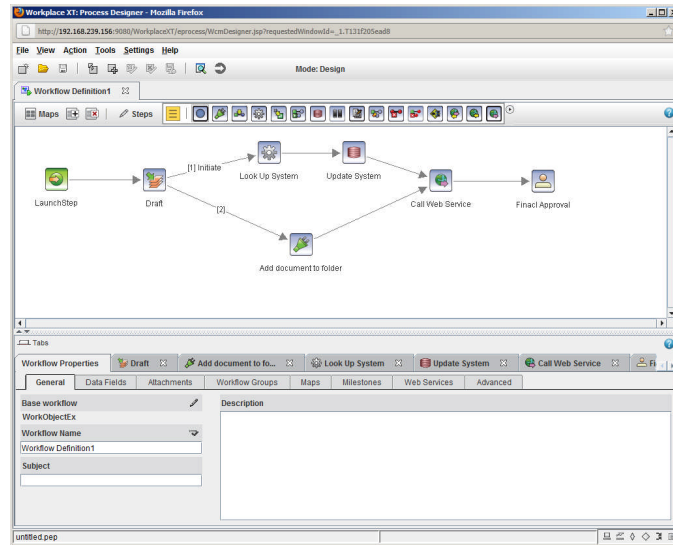
Return on Information: The New ROI



Document Centric Workflow

- IBM's document-centric workflow enables:
 - **Connect documents and people**
 - **Automate financial, legal and human resources business processes**
 - **Adapt workflows with Business Rules**
 - **Design, Execute and Participate through a Rich, Configurable User Interface**

DESIGN



EXECUTE

Data Field Workflow

Due date: Not set | Started by: suser@gross.local | Received on: 11/12/2012 11:46 AM | Step: Approval Step

[View Instructions](#)

Properties | Attachments | History

boolean1: True

booleanarray1: True

date1: 9/10/1977 2:28 AM

datearray1: 7/17/2012 8:02 AM

float1: 42.5

floatarray1: 0

integer1: 44

Get next work item

Complete | Reassign | Save | Cancel

TRACK

Track Me

Due date: Not set | Started by: suser@gross.local | Received on: 12/6/2012 3:33 PM | Step: Milestone x5-6

[View Instructions](#)

Properties | **History**

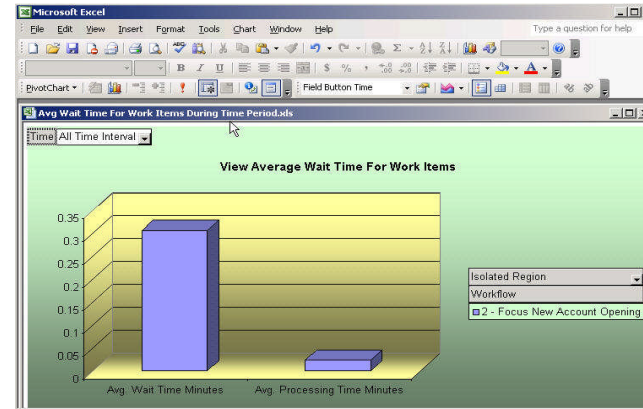
Filter by map: All maps

Step Name	Cycle	Participant	Completed	Response	Comments
LaunchStep	1	suser@gross.local			
Activity	1		12/6/2012 3:32 PM	For Lots of Milestones	Set the required properties
Milestone x1-2	1		12/6/2012 3:33 PM		Added a comment on properties
Milestone x3-4	1		12/6/2012 3:33 PM		Reviewed the attachments.
Milestone x5-6	1				

Get next work item

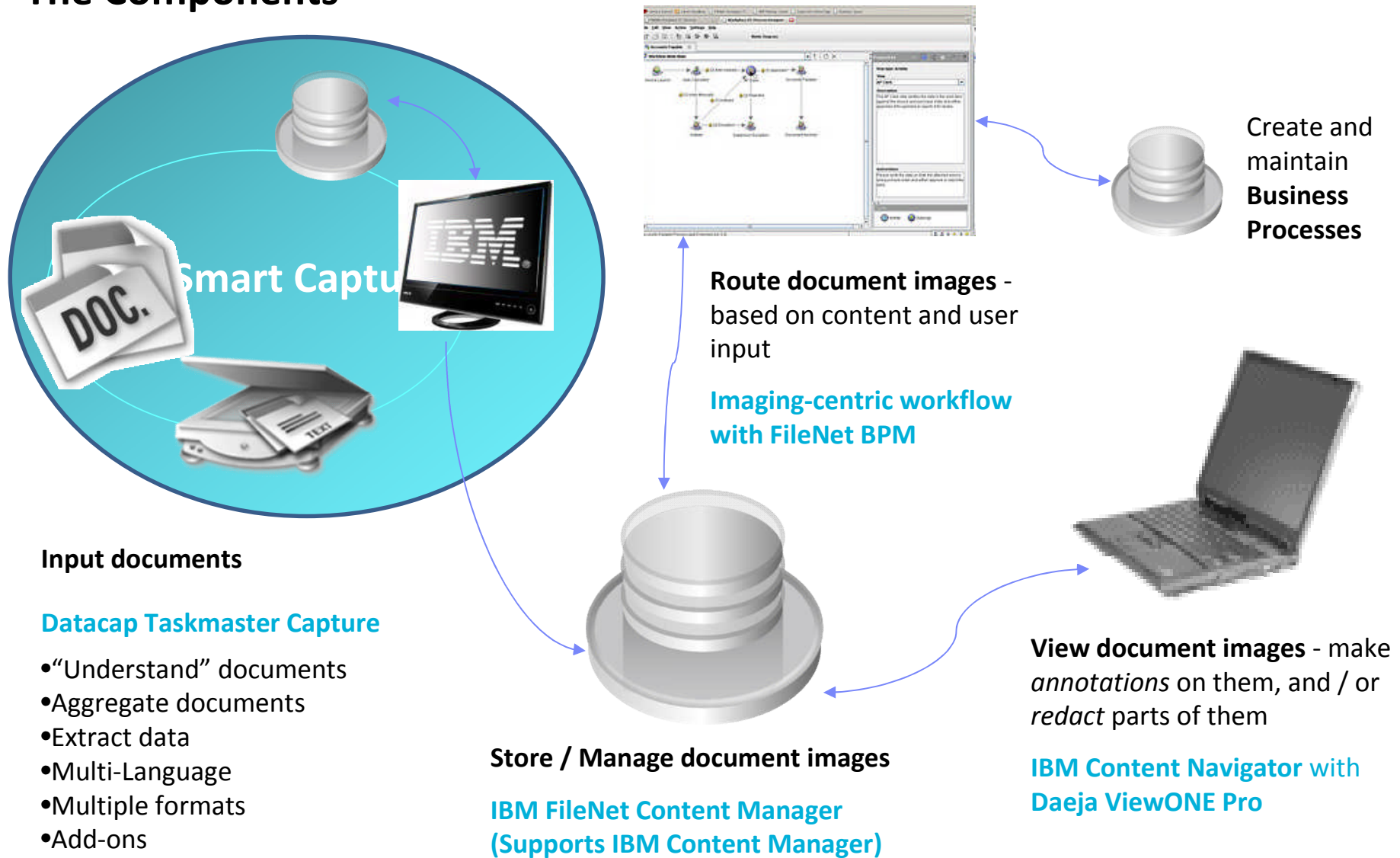
Complete | Move to In-basket | Reassign | Save | Cancel

MEASURE



Production Imaging Edition

The Components



Horizontal Starting Points

- Employee Lifecycle Management
- Product/Service Lifecycle Management
- Asset Lifecycle Management
- Customer Lifecycle Management
- Project Management
- Corporate Legal & Compliance
- Supply Chain
 - Contract Lifecycle Management
 - ERP Integration
 - **Accounts Payable**
- Information Technology

Vertical Starting Points

Backfile conversion to reclaim storage space	Customers Activation Forms Capture	Accounts Payable capture for supply chain	Tax form processing for govt. revenue	Mortgage capture to accelerate lending
Medical claims capture for timely payments	Policy Scanning and Activation		Survey/Census processing for accurate data gathering	Capture for customs clearance
Shipping and Transportation Documents Capture	Medical Records capture for better care	Capture for Subscription processing	New customer on boarding for fast service	Scan and Retrieve Research Documents
Scan and archive for compliance	Visa Application Forms Capture	Correspondence capture and tracking for compliance	Sales order entry for fast fulfillment	Insurance Claims



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THANK YOU