### **Agile ECM**

### Gain Control of Your Content and Optimize with Rapid Delivery of Innovative Solutions

Monique Ruggiero – Senior ECM Specialist





## Organizations Want Agility for Better Outcomes

#### **Reduce Costs**

- Automate manual processes
- Reduce complexity
- Reduce the cost of change
- Reduce errors and exceptions
- Minimize cost of legal and regulatory compliance



#### Increase Flexibility

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- Reduce process cycle times
- Implement faster change
- React quickly to threats and opportunities
- Reduce risk and respond rapidly to changing regulatory and legal requirements

#### CIO's top priority over last three years: "Improving Business Processes"

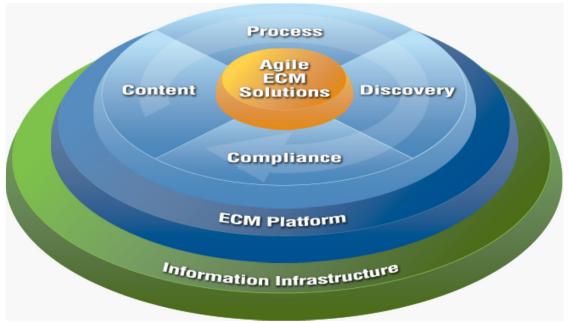
Source: Gartner, "Making the Difference: The 2008 CIO Agenda," Jan. 2008





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## IBM Agile ECM empowering better decisions faster



## IBM Agile ECM helps companies make *better decisions faster* by:

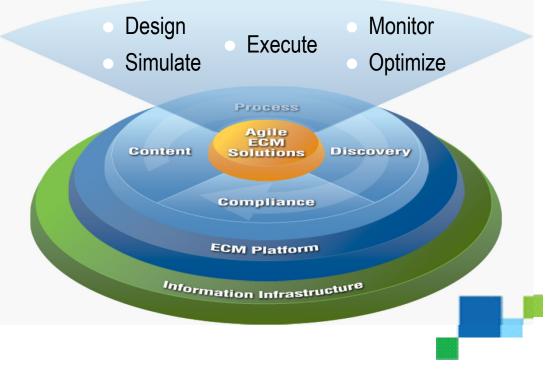
- Managing all forms of content
- Optimizing associated business processes
- Enabling compliance
- Deriving insight from content

through an integrated information infrastructure



## IBM Agile ECM Content-centric BPM

- Supports Rapid Application Development
- Increases Business/IT Collaboration
- Promotes asset reuse





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## Foundationally Sound Business Agility Putting enterprise content under control and making them work





## Example Case Management – All The Right Son Demand

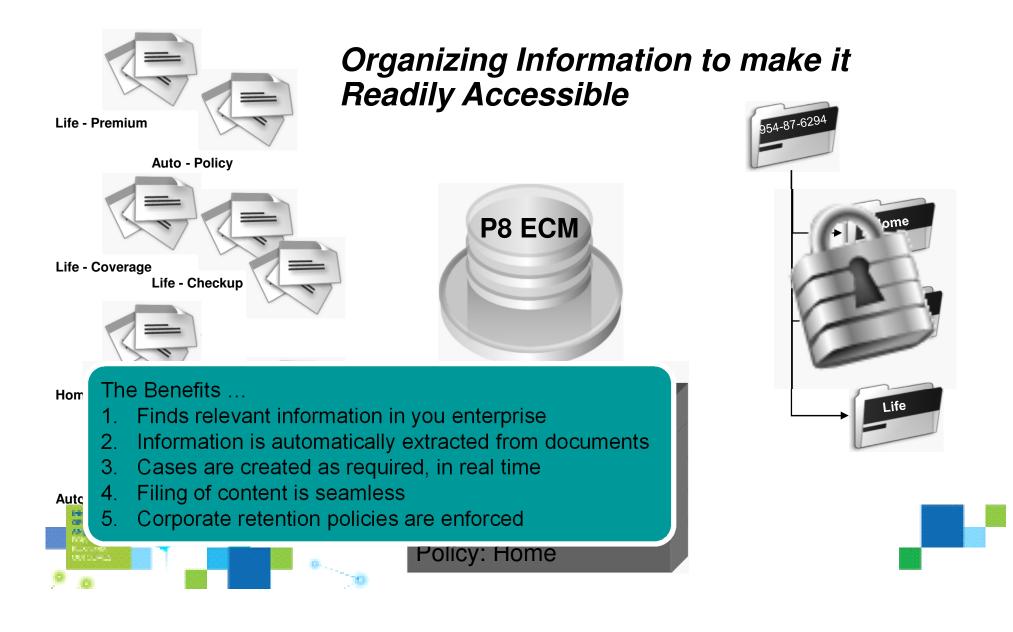
... At the Moment it Matters Most





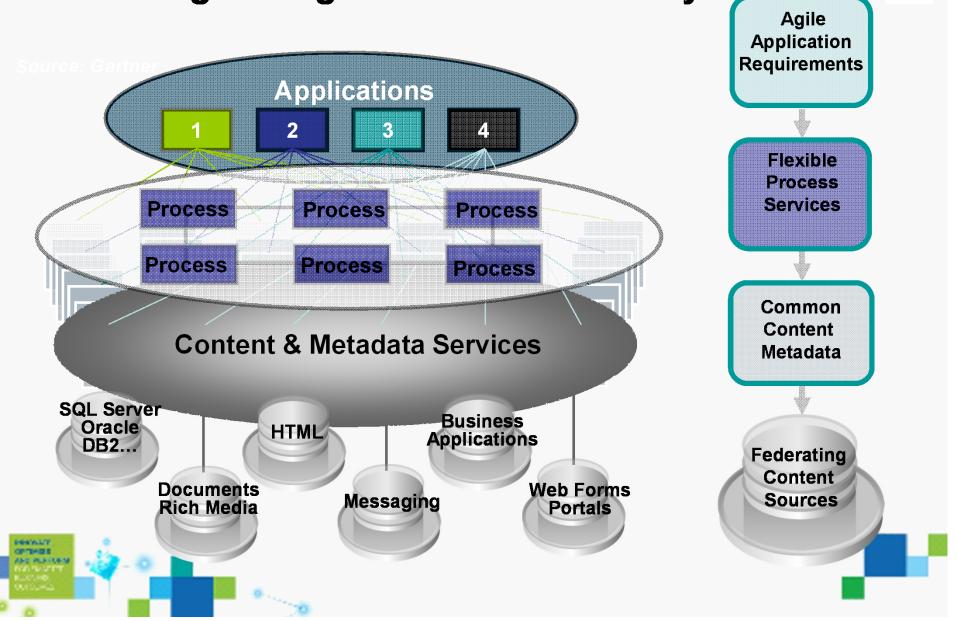
Example Intelligent Case Classification

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### Organizations value Process Agility Accessing the right Information is key

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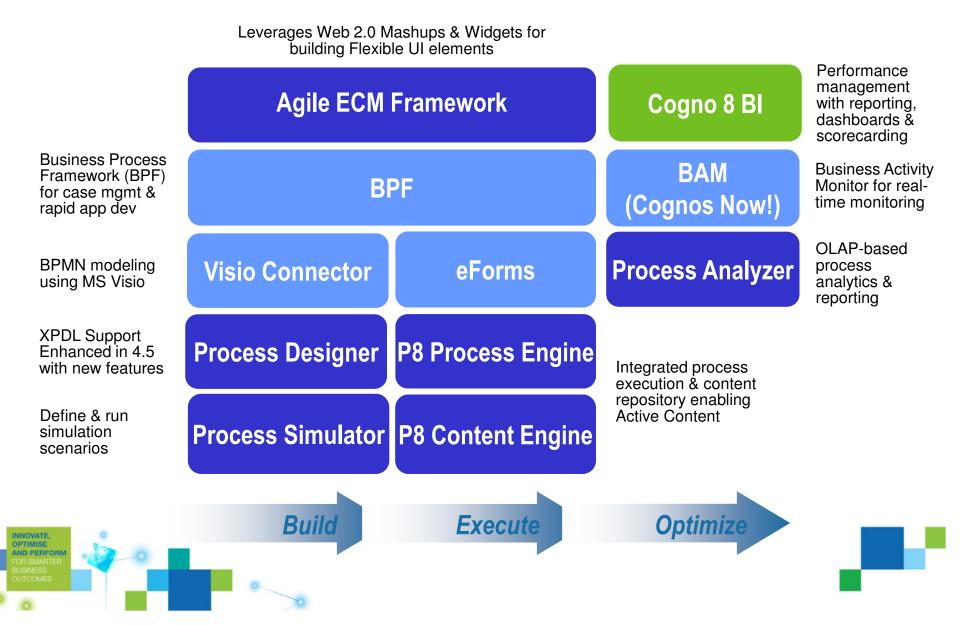
IBM Information >>> On Demand 2009

## IBM FileNet Business Process Manager V4.5 Rapid delivery of innovative solutions





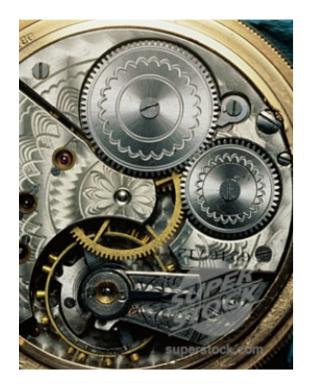
## IBM FileNet Business Process Management Suite V4.5 Overview



# So what technology is right for me?



### **Business Process Framework**



- Process worker focused
- Point solutions
- In use at many customers around the world





## **ECM Widgets**



- Collaborative
- Reusable
- Component-based
- Business focused solutions
- Comparatively new



### **Custom Applications**



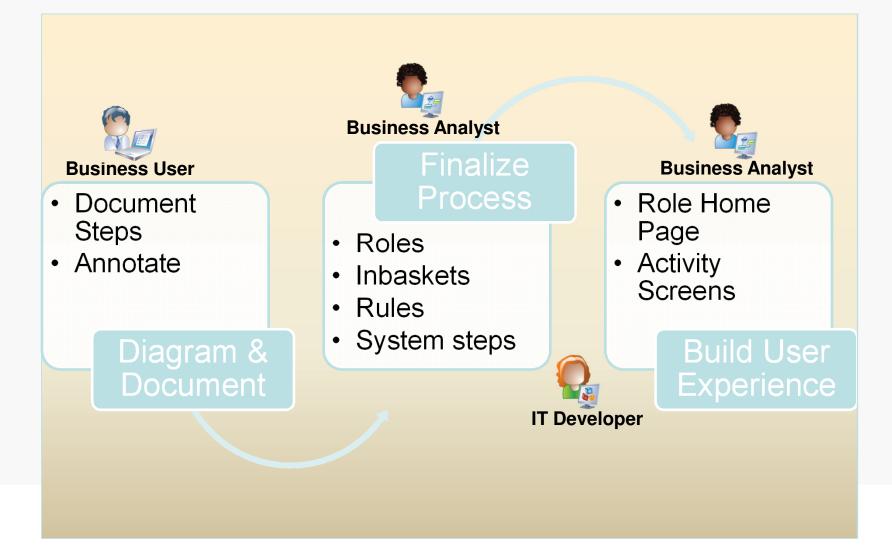
Greater technical flexibility and control at a higher cost





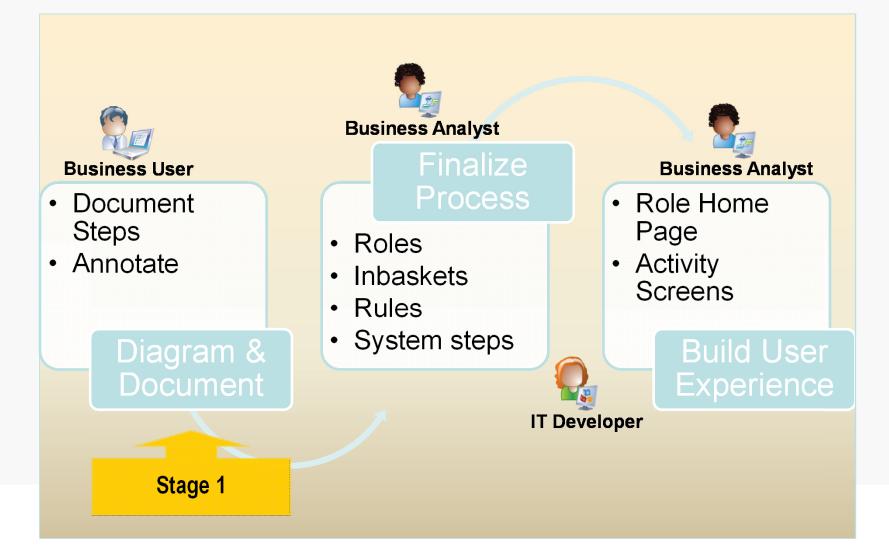
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## **Application Development Stages**



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## **Application Development Stages**



## Diagram and Document Mode

- This mode in the Process Designer allows a business user to easily draw out their processes without having to worry about the technical details behind them
- This mode, controlled by user access rights, hides most of the more complex configuration user interface







## Create a new process in the simplified Diagram Mode

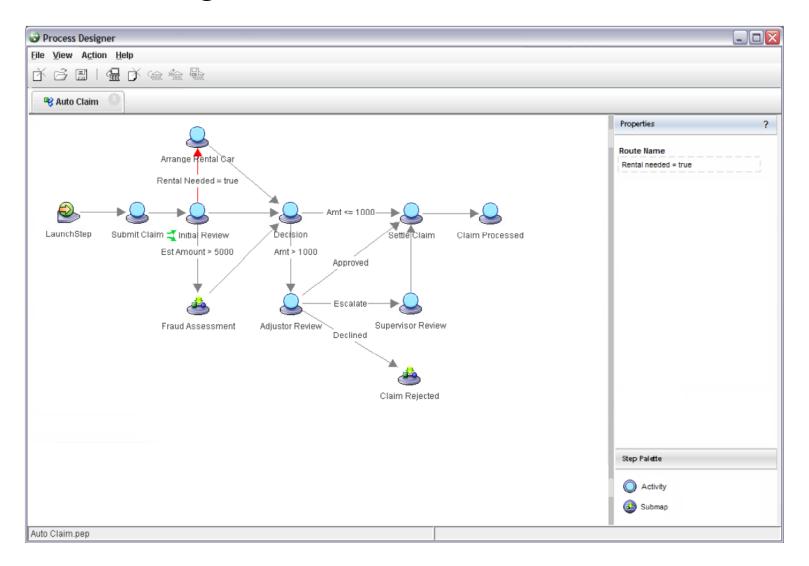
Process Designer		
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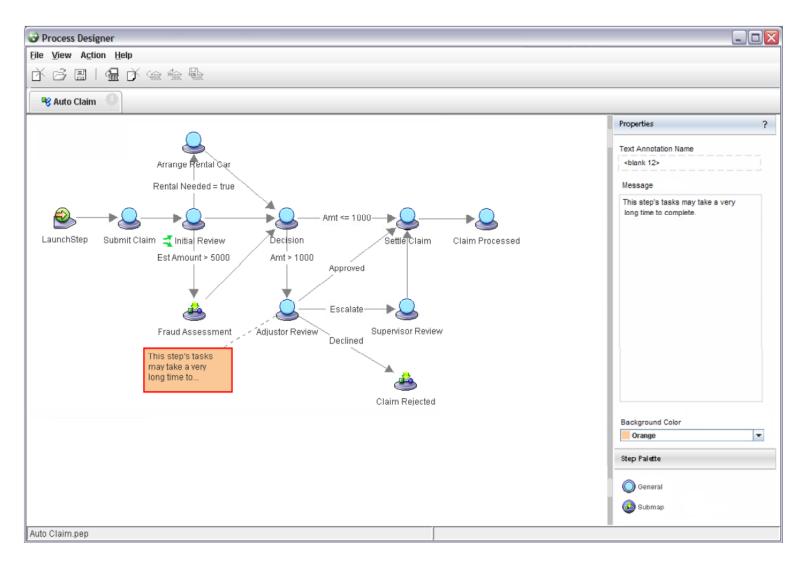
## Create and document a new activity

S Process Designer	
<u>File View Action Help</u>	
Reverse Auto Claim	
	Properties ?
	Step Name Submit Claim Step Description
LaunchStep Submit Claim	At this step a clerk with proper certification reviews the supplied information and submits the claim to the insurance system.
	Step Instructions
	Review the documents for completeness and enter the necessary information to submit the claim.
	Step Palette
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### Enter routing and labels

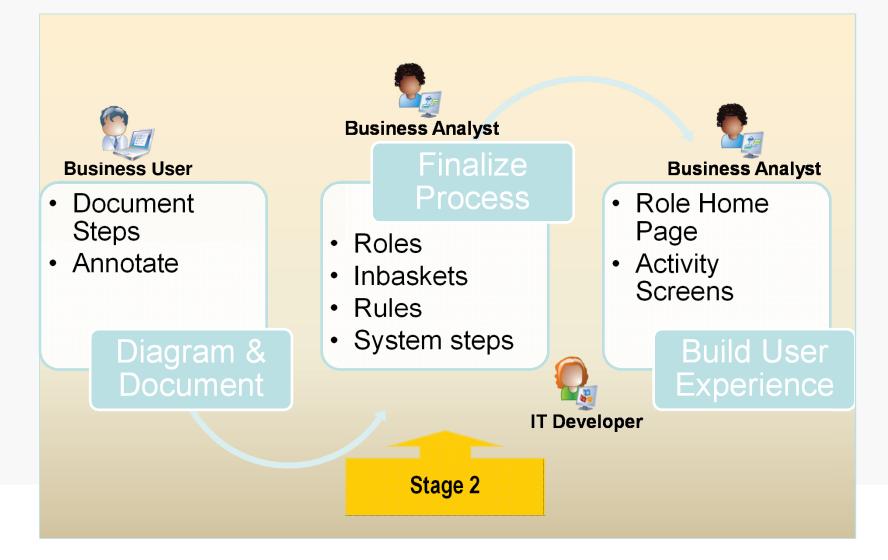


### Add annotations



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## **Application Development Stages**



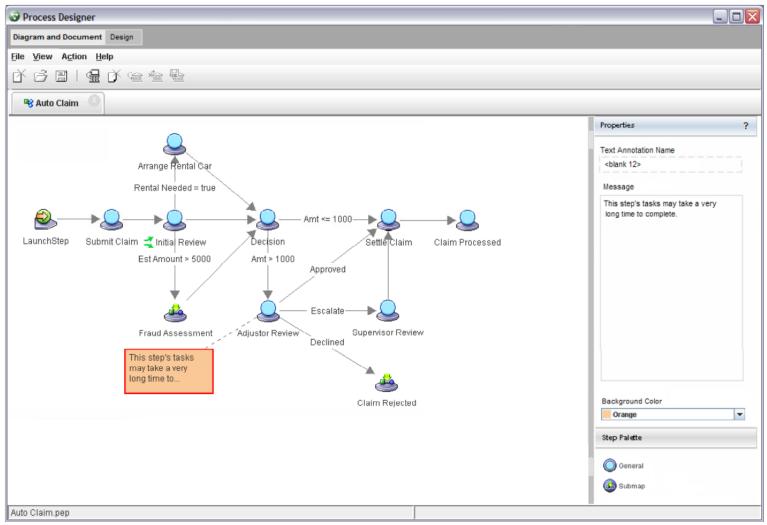
## Finalize Process Configuration

- Targeted at the business analyst user
- Same process diagram now displayed in the full Design mode
- Access to the Design mode controlled by user access rights
- Allows iterative approach (no export / import required)

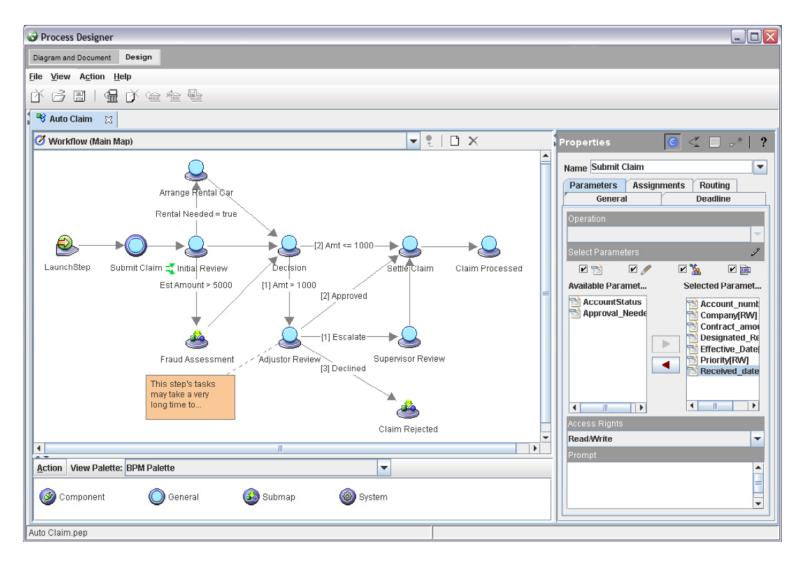




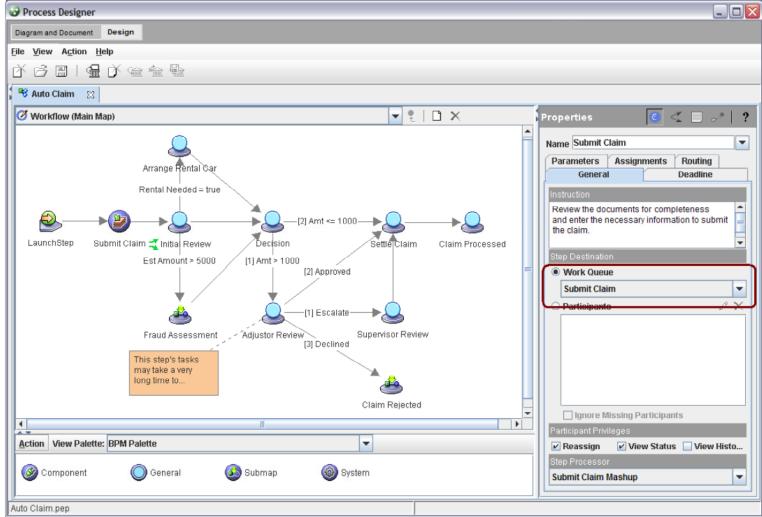
## Business Analyst opens process document



## Switches into Design Mode

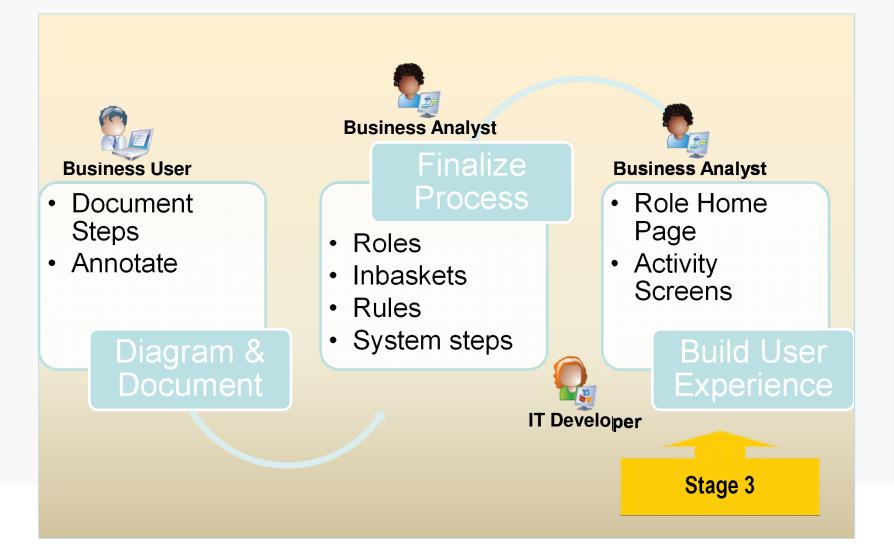


## Complete the configuration behind the process



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## **Application Development Stages**





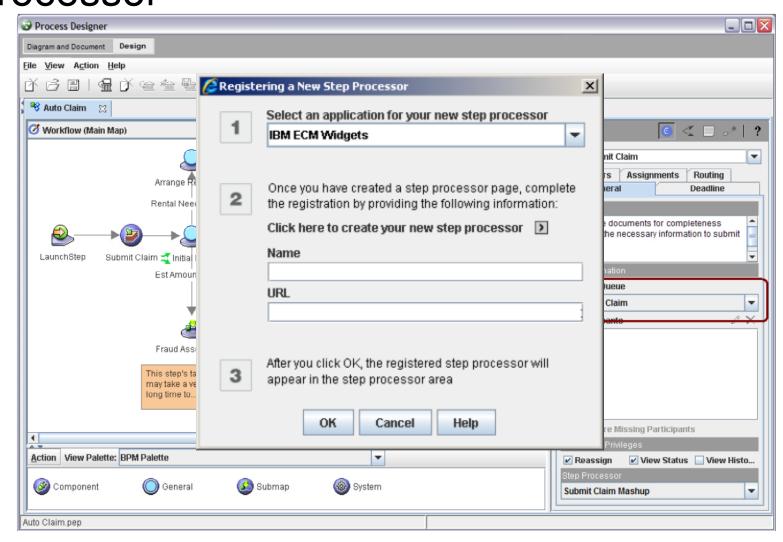
## Creating a new mashup Step Processor

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		New Command				





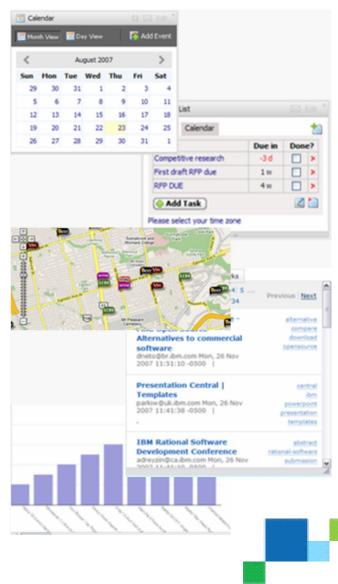
## Create a new Mashup Step Processor



## What is a Widget?

- A widget is a small application or piece of dynamic content that can be easily placed into a web page
- Widgets are called different names by different vendors: gadgets, blocks, flakes
- Widgets can be written in any web language or and can be simply HTML
- "Mashable" widgets pass events, so that they can be wired together to create something new





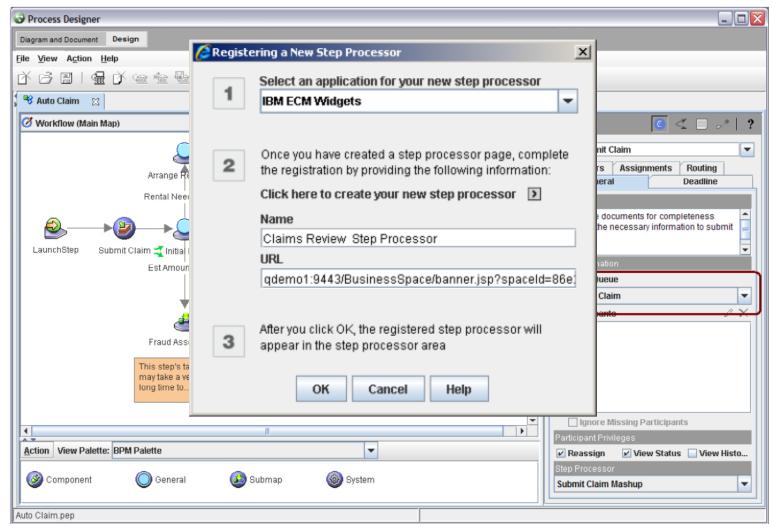
## IBM FileNet BPM 4.5.1

- What's new?
  - Websphere Business Space as included mashup container
  - Business Space compatible version of the ECM 4.5 widgets
  - Additional widgets
    - ECM Content List Widget
    - ECM Work Data eForm
  - Widget Enhancements
    - Improved ECM Toolbar configuration
    - Automatically view attachment in ECM Viewer
  - New installation and configuration tool





## Register the new Mashup Step Processor





## Assemble a new Mashup Step Processor

AND

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## Assign the Mashup Step Processor to the step

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## Design Mode – In-baskets

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## Design Mode – Role Definition

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# Create a Mashup Based Role Home Page

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### Adding Widgets to the Role Home Page

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# Configure the Role for the In-basket Widget

In-basket
Set your basic configuration options for the in-basket display.
Number of work items to display per page
15
Select a role
AP Supervisor -
Claims Adjustor
AP Supervisor
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Old White Connect







### User references a single URL to access the solution

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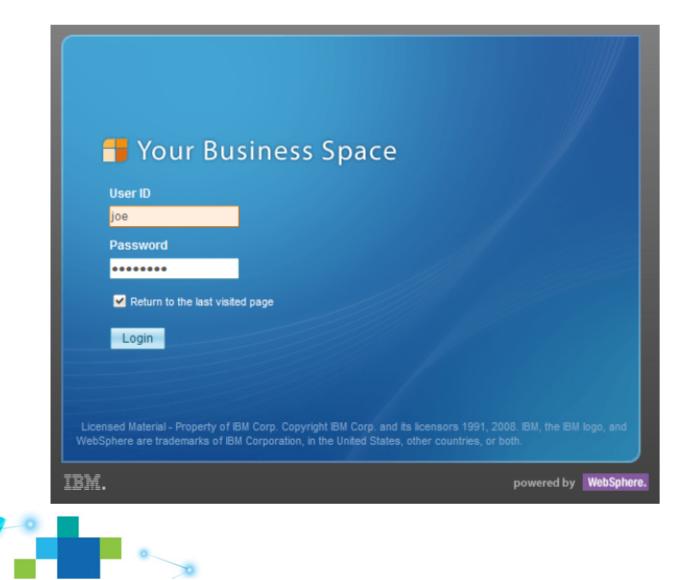






#### Role membership derived from logon

INNOVATE, OPTIMISE AND PERFORM







### User taken to Role Home Page

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# The In-basket Widget can display multiple In-baskets

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### In-basket content can be filtered by the user

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### Clicking an In-basket row displays the Step Processor

#### **Business** Space Welcome joe | Help | Logout New Account Supervisor -## Manage Business Spaces Accounts | New Account Review 🔹 💌 Approve | 💭 New Page 👻 🚛 Add Widgets 👻 **Document Viewer** - - -▼ | \_ □ Header Index View instructions Subject: Case Management Workflow Deadline: toubin Jan TUSZE 8-1-02 SCHONE IN Work Data ×1-0 NON BEALTY & Account Number S Drieter Art Blue Art. Lasucagi 89/02 631-6801 938498349 124 534 89030 Company Name Spiffy Limited 89102 576-2685 Doct Cob. Las Venas ! Checker ober 380 Tompkins Contract Amount noestrial she las veras in 9,000,000 CA 93215 611 78.03 Canall Home Address 0 and 5 gross mostility income from em 10 Somers Crescent, London SW1 . shift support or seconds mainly ant ha rev the sect railed to have it Almony, child support, separate maintenance i Arrount of other monthly income and source(s) Home ZipCodes CACTODINC: Information Regarding Spouse or Co-Applicant. (Line coparate shools it notaesary. 100085 TOTAL MONTHLY INCOME Child and in case Is Rejected POOR QUALITY THE ROAD ADDRESS THE LEVEL & F THAT Attachments 12.32 Actions 😂 Paper Add the of the set of the set of the set of the set Documents Add Co-Applicant's pross monthly income from employment A impry, shill support or negativity of Paper1 SEC YORD: Asset and Orbi Islamatic Planter Classer project is a set of the first UTAL MONTHLY INCOME B+ shelte Care **T** | = 0 Step Completion i 👳 A Page1of1 Save Select a response Complete Close -

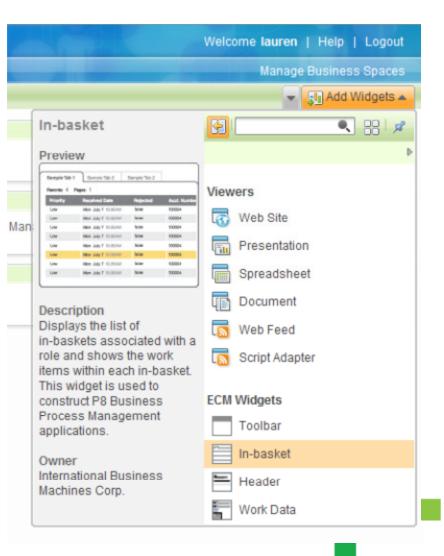
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# Completing a step returns to the Role Home Page

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### **IBM ECM Widgets**

- A collection of widgets and sample mashup pages
- Home Page Widgets
  - ECM Toolbar
  - ECM In-basket
- Step Processor Widgets
  - ECM Header
  - ECM Work Data
  - ECM Work Data eForm
  - ECM Attachment
  - ECM Step Completion
  - ECM Viewer
  - ECM Content List
- Helper Widgets
  - ECM Create Work Item
  - ECM Create Action
  - ECM Web Page Displayer







### Role Home Page Widgets

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<b>B</b> 0	Filenet IBM	common	78,697	3/8/09 3:49 PM	true	
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### Step Processor Page Widgets

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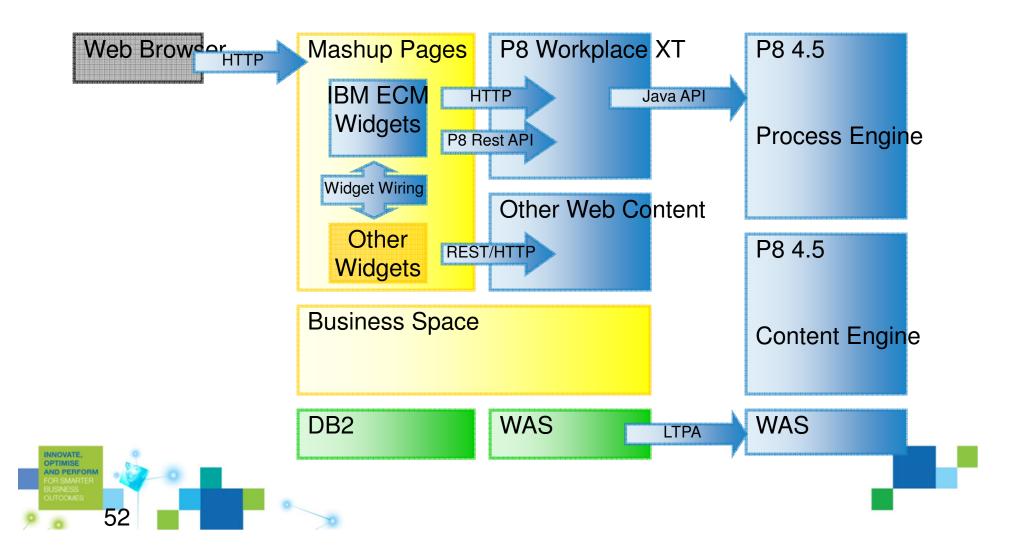
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