



Information Management

WebSphere Customer Center
Product Vision and Roadmap
November 2006

IBM Software Group



ON DEMAND BUSINESS™

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Agenda

- Product Vision
- Product Roadmap
- Recent Release(s)
 - ▶ WCC v6.5
- Upcoming Release(s)
 - ▶ WCC v7.0
- Master Data Management



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- Development Process



WebSphere Customer Center *Product Vision*

- Vision statement

To be the most fully functional and high-performance customer transaction hub that is integrated with complimentary master data management and business information service offerings



WebSphere Customer Center

Product Vision (continued)

- Key strategic product initiatives
 - ▶ Continued development of core product functionality
 - New large grain services
 - Additional subject areas & fine grain services
 - ▶ Continued development of new common components (business logic functionality)
 - ▶ Lower total cost of ownership for our clients
 - Pre-integration with multiple components for common processes – ETL, standardization, etc.
 - Ensure that WCC has open interfaces to enable integration outside of the product roadmap
 - Build tooling to automate manual coding efforts where appropriate
 - Identify repeatable patterns in field implementations and incorporate function into the roadmap where appropriate
 - ▶ Integration with solution-broadening functionality
 - Use IBM MDM components and BIS offerings to proof

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Product Vision (continued)

- Product functional vision:
 - ▶ To manage all party-centric information via a service-oriented architecture and to be the system of record for operational party data
 - ▶ To manage the entire customer lifecycle
 - ▶ Autonomic CDI
 - ▶ To integrate with business process management applications to offer complete customer-centric processing
 - ▶ To integrate with applications that will generate additional insight into the customer relationship and 'operationalize' that insight
 - ▶ To integrate with additional master management applications as appropriate, or have a joint integration story with BPM

WebSphere Customer Center

Product Vision (continued)

- Product architectural vision
 - ▶ Service-oriented architecture (SOA)
 - ▶ To be a transaction processor
 - ▶ Componentization
 - ▶ Flexibility
 - ▶ High-performance & scalability
 - ▶ Neutrality

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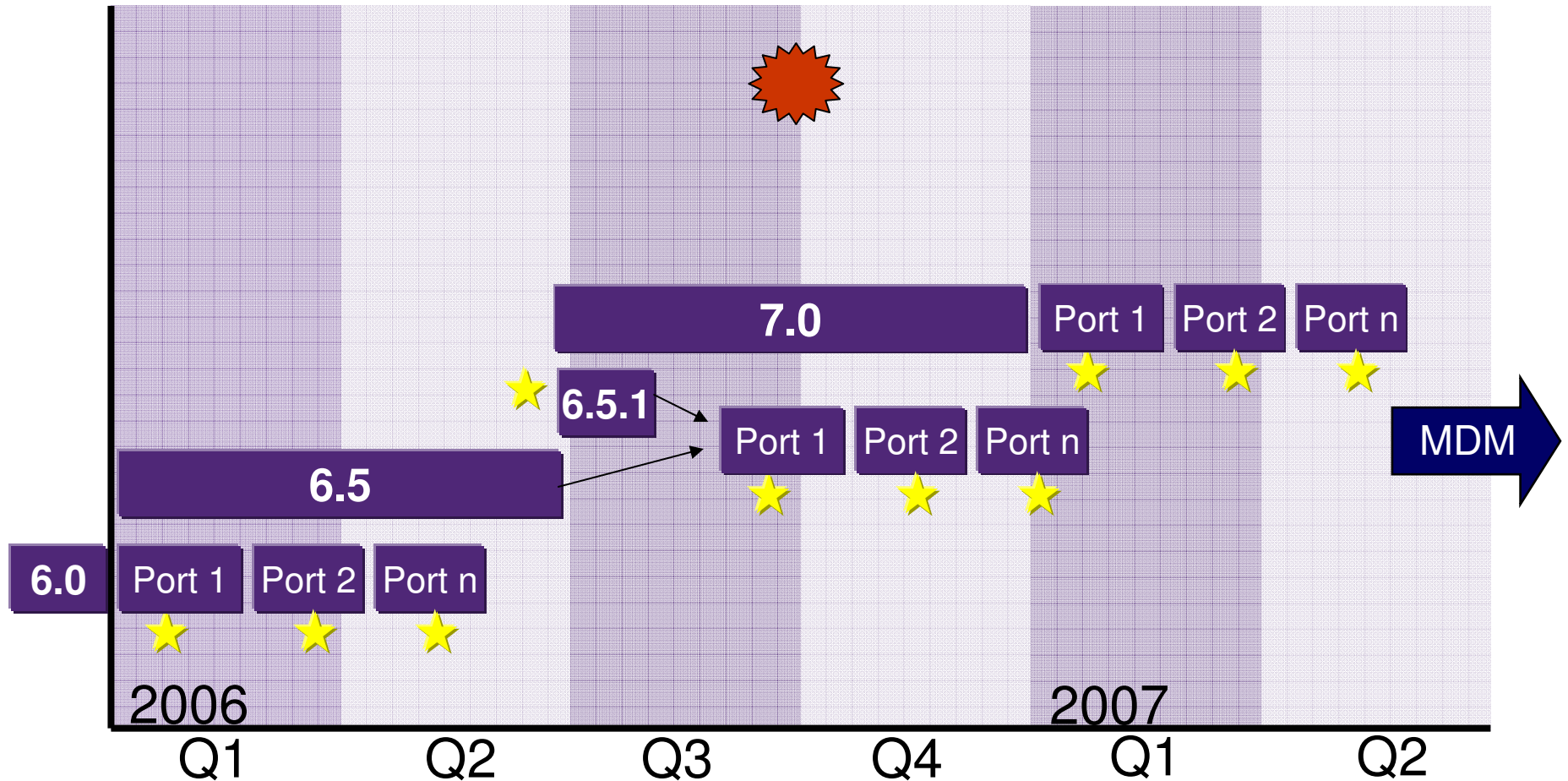


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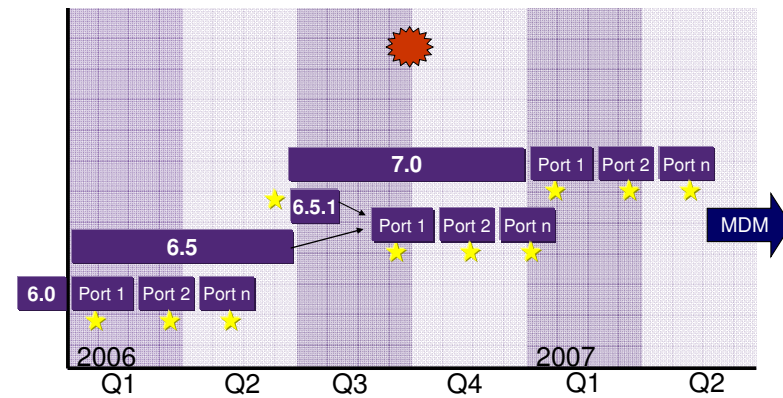
WebSphere Customer Center Product Release Schedule



Advisory Board Input If required

WebSphere Customer Center *Product Requirement Overview*

- Develop new functionality
- Enhance existing functionality
- Integration
- Platform support
- Technology improvements
- Performance
- Maintenance items



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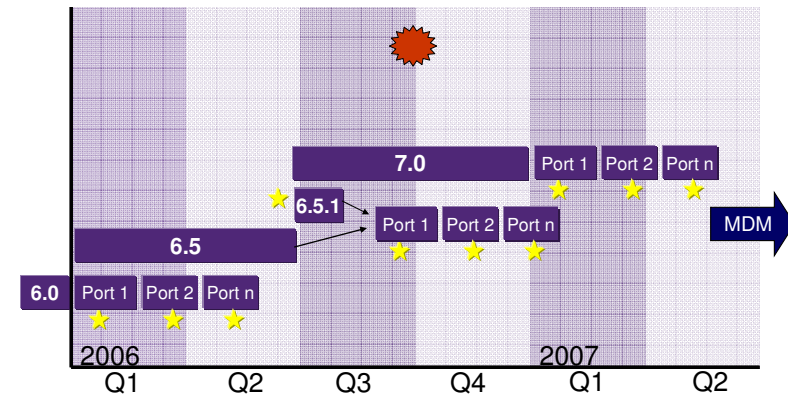
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WebSphere Customer Center Product Roadmap Version 6.5

- Full internationalization enablement
 - ▶ Support for single and multi-byte character sets (unicode/UTF-8)
 - ▶ Support for multiple standardization deployment (i.e., ability to call multiple country standardizers)
 - ▶ Internationalization of product UIs (admin UI and data stewardship UI)
 - ▶ Support for international date formats
- Functionality
 - ▶ Web Services
 - Level 1 interface – release 1
 - ▶ Fast Track Facility
 - ▶ Installation improvements



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WebSphere Customer Center v 6.5

Internationalization (I18N)

- Localized (L10N) for:
 - ▶ English
 - ▶ Chinese (simplified)
 - ▶ Chinese (traditional)
 - ▶ Japanese
 - ▶ Korean
 - ▶ French
 - ▶ German
 - ▶ Italian
 - ▶ Spanish
 - ▶ Portuguese (Brazil)
 - ▶ Polish

Agenda

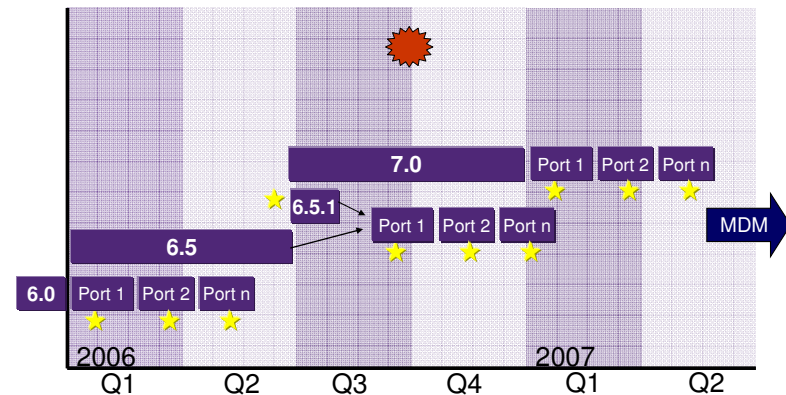
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WebSphere Customer Center

Product Roadmap Version 7.0

- New Functionality
 - ▶ Enhanced search capabilities
 - ▶ New transactions
 - ▶ Delta processing services
 - ▶ Data corruption management
 - ▶ Aggregate view of known duplicate suspect records
 - ▶ Pending Party critical data changes
- Enhancements to existing functionality
 - ▶ Support for Probabilistic Matching (WebSphere QualityStage matching engine)
 - ▶ Macro Role enhancements
 - ▶ Rules of visibility enhancements
 - ▶ Enhanced Grouping Services
- Integration
 - ▶ ETL integration (WebSphere DataStage)
 - ▶ Enhanced Web services integration
 - ▶ Entity Analytics integration



- Technology & architecture
 - ▶ Framework enhancements
 - ▶ Report enablement
 - ▶ History enhancements
- Performance
 - ▶ Performance improvements
 - ▶ Benchmarking
- User Interface Enhancements
 - ▶ Data Stewardship UI
 - ▶ Administration UI

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WebSphere Customer Center v7.0

New Functionality

- Enhanced search capabilities
 - ▶ Phonetic searches – party names (various), city name
 - ▶ Common name exclusion
 - ▶ Support for additional wildcard/look-alike searches (e.g., last 4 digits, middle 3 characters, etc.)
 - ▶ Search by: macro role, partial contact method, zip code and party equivalency

- Delta processing services
 - ▶ XML composite services to update party or contract using external identifier
 - Get Party by party equivalency ID
 - Update contract by contract system ID
 - Update party by party equivalency ID

- New (selected) services
 - ▶ N-Party Collapse
 - ▶ Process Control Table services

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WebSphere Customer Center v 7.0

New Functionality (continued)

- Data corruption management
 - ▶ Ability to define data corruption events and monitor them using event manager
 - ▶ Detection of an event results in notification messages and logging the event

- Aggregate view of known duplicate suspect records
 - ▶ Non-persistent aggregation of duplicate party records
 - ▶ Ability to manage/view duplicate and separate party records
 - ▶ Identified by “x factor” (e.g. line-of-business)

- Pending party critical data changes
 - ▶ Pend awaiting review by authorized user
 - ▶ Subject to security authority can be bypassed

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WebSphere Customer Center v 7.0

Enhancements to existing functionality

- Party Matching Enhancements
 - ▶ Deterministic matching, same as previous releases
 - ▶ Probabilistic matching by Quality Stage, as a new option, either:
 - Replaces deterministic matching algorithm (real-time or evergreen)
 - Augments deterministic matching algorithm by re-evaluating deterministic A2s and Bs in near-real-time, using Event Manager
- Macro role enhancements
 - ▶ Get party by role (large grain inquiry service)
- Rules of visibility enhancements
 - ▶ Pre-execution determination -- pre-determine objects (party objects and sub-objects) that may be accessed
- Generic grouping services
- New data field
 - ▶ Customer since date

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WebSphere Customer Center v 7.0 *Integration*

- Extract, transform, and load (ETL)
 - ▶ Integration with WebSphere DataStage using WCC meta data for WCC load
 - ▶ Integration with WebSphere DataStage using WCC meta data for WCC extracts – for data exports from WCC to other applications

- Integration with WebSphere QualityStage
 - ▶ Probabilistic matching engine addition (as mentioned on the enhanced functionality slide)
 - ▶ For name and address standardization

- Web services interface for business services (web services as a first-level interface)

- Integration with Entity Analytics

- Dun & Bradstreet Integration
 - ▶ For matching and/or enrichment

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Technology & Architecture Enhancements

- Inquiry transaction framework enhancements
- Fast Track Transaction Server enhancements
- Report enablement – aggregate data
- Upgrade ARM interface to ARM 4.0 standard
- Ability to supply external transaction ID for transaction audit log
- Component Security
- History enhancements

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WebSphere Customer Center v 7.0

Performance

- Rules of visibility enhancements will enhance performance
- Search enhancements may improve performance on search services
- Additional performance enhancement / tuning
- Performance heavy load testing introduced as part of product certification

WebSphere Customer Center v 7.0

User interface enhancements

- Data stewardship user interface
 - ▶ Party maintenance functionality
 - ▶ N-Party collapse functionality
 - ▶ Inclusion of source and data decay attributes
 - ▶ Enhanced grouping functionality
 - ▶ Enhanced hierarchy functionality

- Administration user interface
 - ▶ PCT user interface
 - ▶ Meta data user interface

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Strategic View

Enterprises exist ...

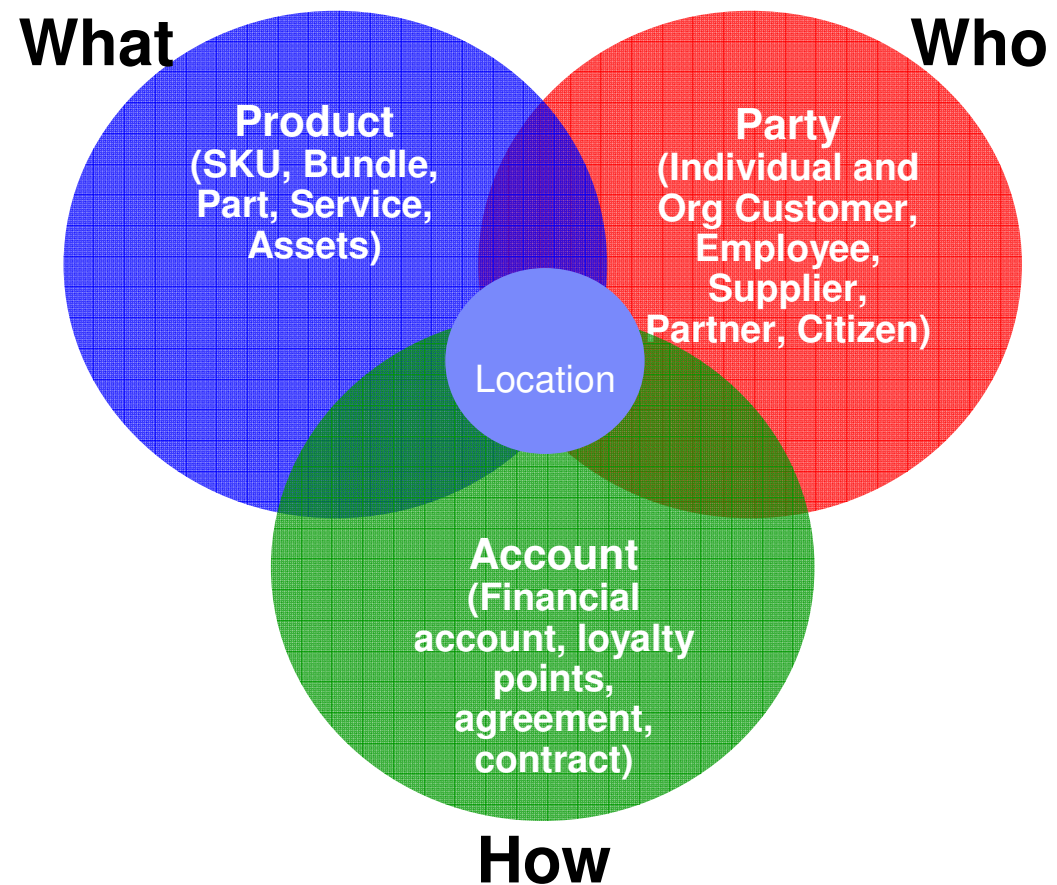
- ... to serve customers
- ... by delivering products and services to them
- ... via effective understanding of their relationship with them

IBM's Current Focus

- Party
- Product
- Account?

Supported by

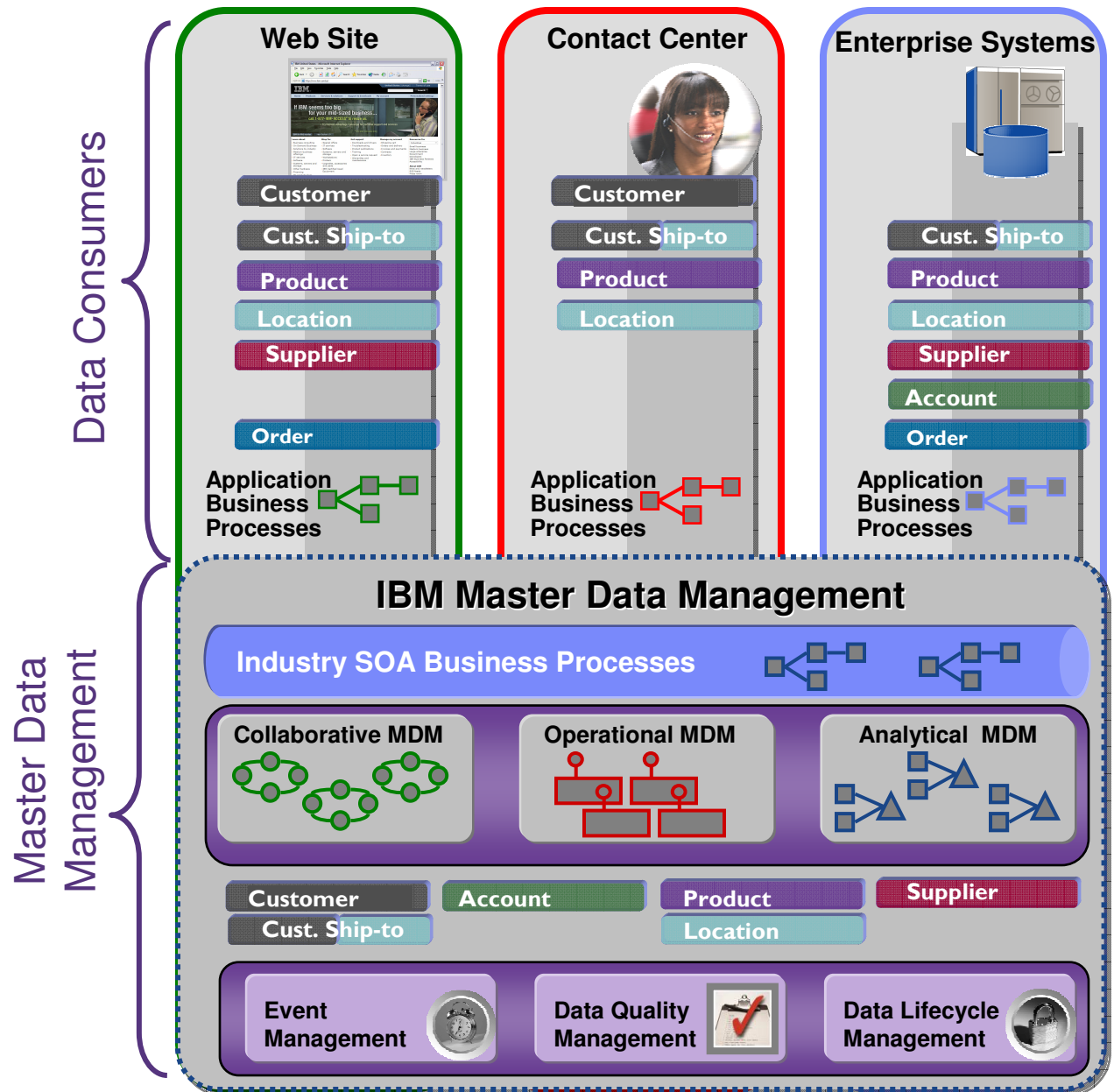
- Location
- ...



The Right Solution IBM Master Data Management

Separation of application function from data function to create common data processing capabilities

- Separation of common data functionality into an enterprise application
- Integration of data function via business services to serve *all* data consumers
- Master data management is complementary to application processes
 - ▶ *It provides applications with accurate and complete data about all key business entities*

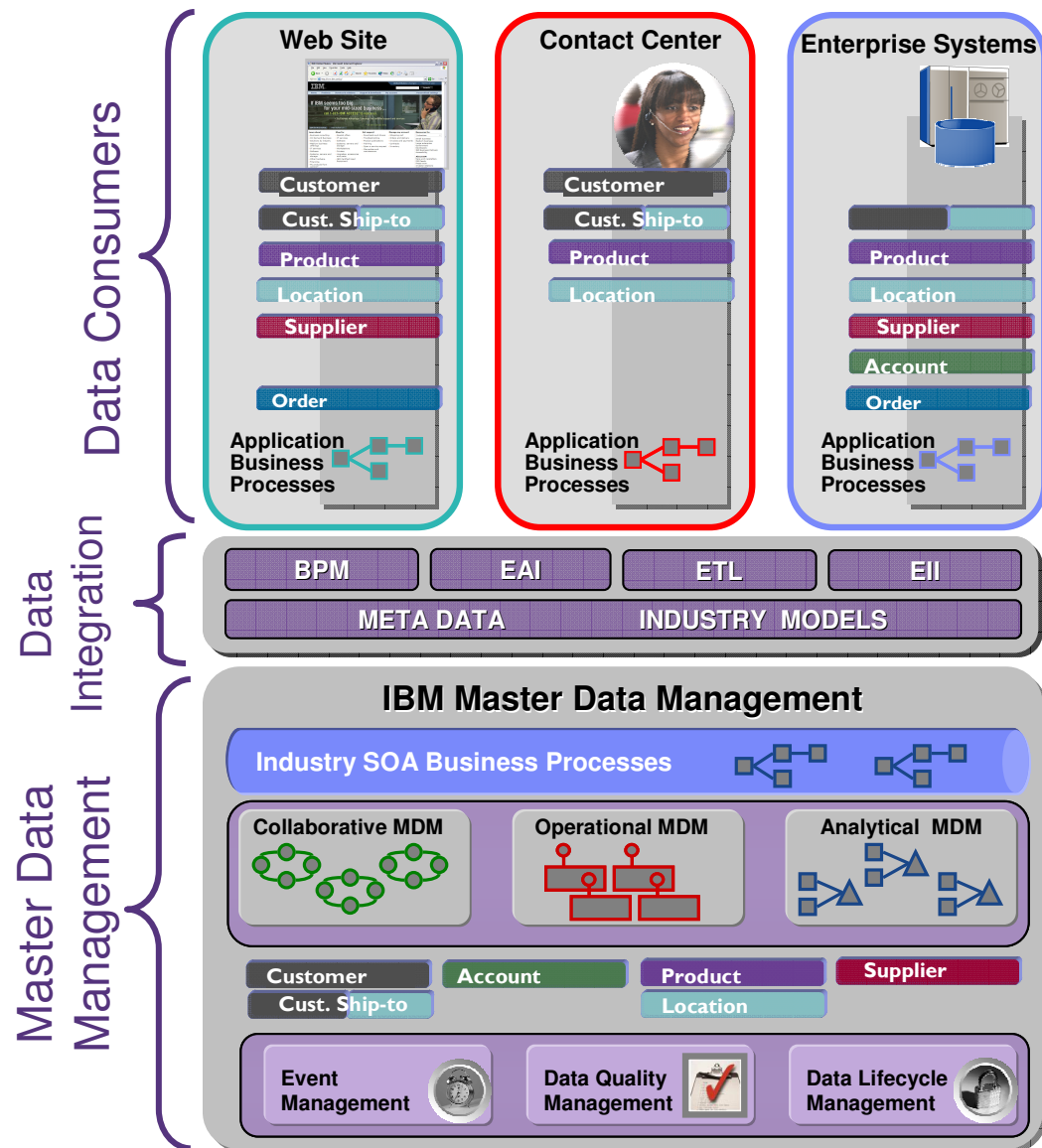


Data Integration: Bridge “consumers” and “managers”

IBM has the leading integration functionality, and IBM MDM is better positioned to integrate to consumers than any other MDM solution

IBM Industry Models and IBM Integration Infrastructure

- Integrated with IBM Industry Data, Process and Service Models
- Models link MDM to Process Server and Business Services Fabric
- Information Server for delivery of trust information
- IBM Industry Process and Service models provide MDM Implementation Accelerators



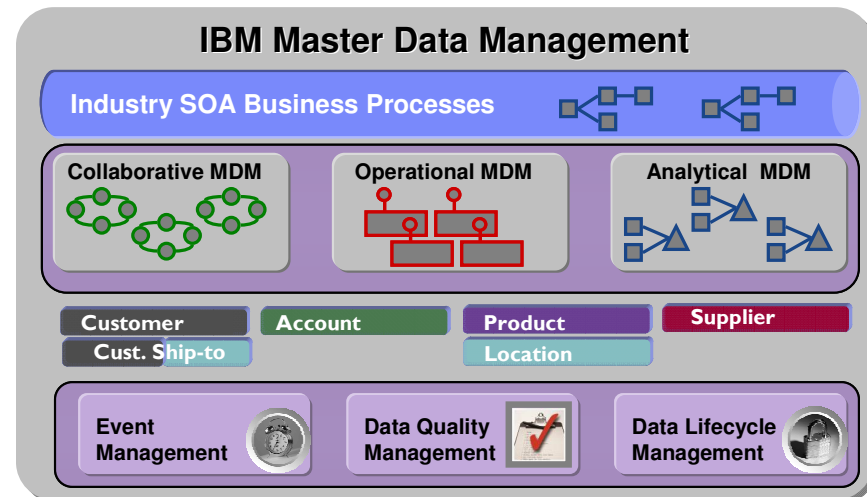
IBM Master Data Management

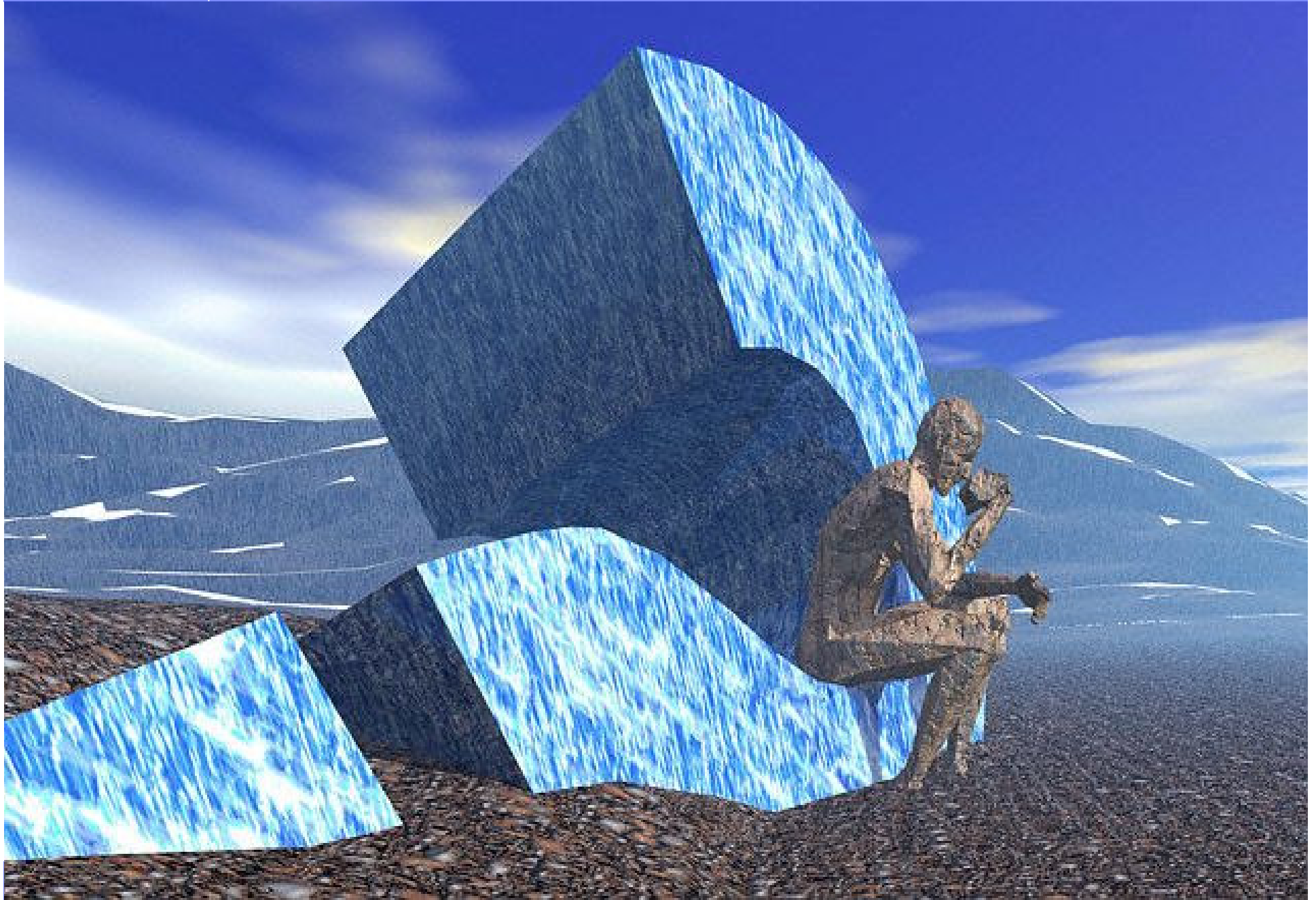
Core Capabilities

- **Multi-Style**
 - ▶ **Collaborative MDM**
 - Authoring, workflow, check in/out services to support collaboration on master data creation, management and quality control
 - ▶ **Operational MDM**
 - Business services to ingest master data from range of sources, manage it and fulfill all consumer uses of master data
 - Over 500 Business Services
 - Act as “System of Record”
 - ▶ **Analytic MDM**
 - Identity resolution & relationship discovery
 - Master data simplifies input to analytical environments (DWs) and improves quality (MDM is source)
 - Enterprise reporting and analytics
 - Industry-specific data warehouses

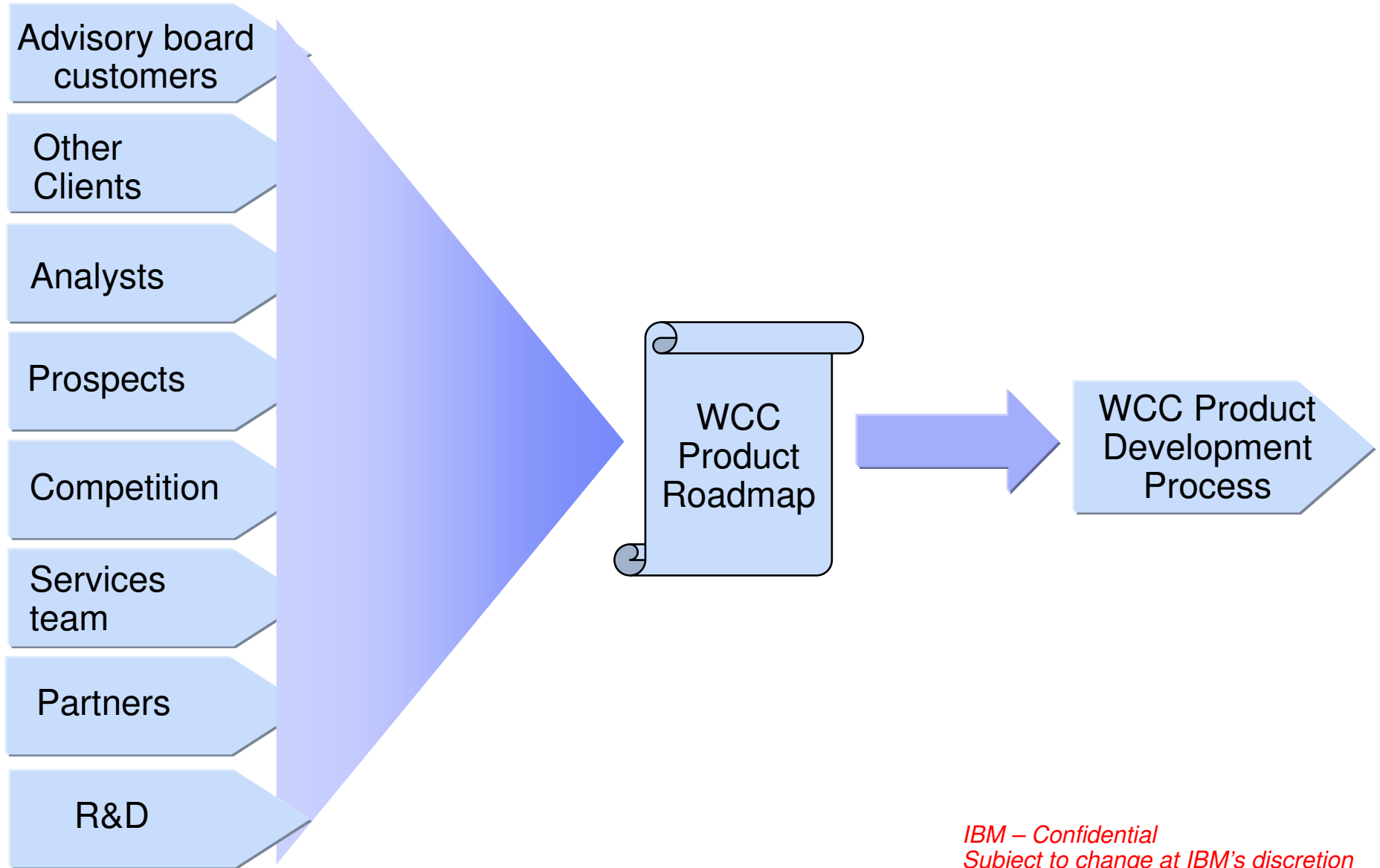
- **Multi-Domain**
 - ▶ Support for Customer, Product, Account, Location, Supplier

- **Data Quality Management**
 - ▶ Duplicate record processing
 - ▶ Data validation, cleansing & standardization
- **Event Management**
 - ▶ Event detection & management
 - ▶ Notification to business processes and systems
- **Data Lifecycle Management**
 - ▶ Data Governance
 - ▶ Data access management
 - ▶ Auditing, enterprise rules and policies





Product Roadmap Input



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Product Requirement Definition Process

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