



IBM Systems and Technology Group University 2005

# iSeries in Retail Banking

Course #: I21

Steven Finnes  
iSeries Product Marketing



v 1.0

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IBM Systems and Technology Group University 2005

## Section Title

iSeries in Retail Banking  
Section subtitle second line



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## Learning Objectives

**At the conclusion of this material, you should be able to:**

- Articulate the iSeries Value Proposition in Retail Banking
- Understand the concept of point solutions and what this means relative to expanding opportunities
- Identify the key iSeries Banking ISVs

# Retail Banking: Business Imperatives 2005

## ■ Drive Down Cost

- Standardization and consolidation
- Merge communication and compute infrastructure
- Enable higher levels of customer self service

## ■ Address Regulations & Business Continuity

- Sarbanes Oxley, Patriot Act, Check 21..
- Security, High Availability

## ■ Grow Revenue

- Improve customer service
- Enable new & expanding lines of business
- Grow wallet share of existing customers
- Customer centric verses LOB centric

## ■ Beat the Competition

- .com financial operations
- Large banks
- Non- bank niche competitors



## Marketplace Opportunity - Bank I/T Spend: Drivers of Demand

BANK PERSPECTIVE			
Objectives	Banks' Strategy	Banks' Tactics	Opportunities for IBM
Efficiency	Protect/grow margins through dramatically lower stable cost structures	<ul style="list-style-type: none"> <li>Transform business processes</li> <li>Simplify/renew infrastructure</li> <li>Variabilize cost structures</li> </ul>	<ul style="list-style-type: none"> <li>Business process transformation</li> </ul> <div>Infrastructure Simplification</div>
Growth	Top-line revenue growth via a differentiated value proposition	<ul style="list-style-type: none"> <li>Reinvent the front-office</li> <li>Refocus on the customer</li> <li>Develop new products/services</li> </ul>	<div>upgrade</div> <div>Branch upgrade + multi-channel int</div> <div>Data Integration</div> <div>New product innovation</div>
Resilience	Comply with regulations and protect earnings from Risk in any form	<ul style="list-style-type: none"> <li>Centralize risk management</li> <li>Reduce capital requirements via improved op risk controls</li> <li>Transparent financial reporting</li> </ul>	<div>Business Continuity</div> <div>Sarbanes Oxley etc.</div>
INDUSTRY PERSPECTIVE			
Consolidation	Thrive in consolidating industry	<ul style="list-style-type: none"> <li>Clean up balance sheet</li> <li>Simplify IT environment</li> <li>Maximize business flexibility</li> </ul>	<ul style="list-style-type: none"> <li>Post-merger integration</li> <li>Infrastructure simplification</li> </ul>
China Reform	Exploit growth opportunities in China	<ul style="list-style-type: none"> <li>Prepare for IPO</li> <li>Rebuff new WTO-era competitors</li> </ul>	<ul style="list-style-type: none"> <li>IPO prep. for global competition</li> <li>Market infrastructure requirements</li> </ul>

Breakthrough Technology

## Sales Strategy 2005

- **Better, simple, marketing Campaigns**  
Internal and external
- **HP Attack – i-Series services migration offering**
- **Focus on point solutions –Retail, Private Banking**
- **Linux POC using i-series**
- **Consolidate customers business application with i5OS and AIX on eServer i5**
- **Teaming with IGS to win back oppty from HP, SUN**
- **Work closely with BCS for banking space to bring more ISVs on board especially on Financial Market solutions**



**eServer i-series and Financial Services Sector**  
Alexander Van Den Bergh  
Eu-Jin Tan

# iSeries in Banking

## ■ Market Profile

- Installed in over **16,000** banks world wide, iSeries is one of the most widely deployed banking servers in the world
- Deployed in small banks & credit unions plus many of the world's largest international banking conglomerates

## ■ Technology

- Reputation for mainframe-class reliability, manageability & security
- Integrated i5/OS operating system is optimized for OLTP applications
- Features 1-way to 64-way binary compatible scalability

## ■ Solutions

- Exceptional international portfolio of i5/OS core banking solutions
- Options to consolidate any AIX 5L, Linux and Windows application

## iSeries Value for Banking

- **iSeries is the IBM integrated server**
  - Tested and Integrated by IBM
  - No Assembly Required
  - IBM service and support top to bottom
  - Reliability, Availability, Simplicity
- **Industry leading Efficiency Ratios**
  - Systems Management Autonomics
    - Ease of use
  - Seamless growth
    - Power5 Technology
  - Minimal staff
    - Integrated for Simplicity
- **Highly Available and Secure**
  - 24x7x365: High Availability Clustering Solutions
  - Security : Simple to implement and manage



## iSeries Banking Solutions Partners

**SILVERLAKE**



**MOSAIC SOFTWARE**  
EFT solutions ahead of time

EURONET  INTERNET



*Where tradition  
meets technology<sup>sm</sup>*

**jack henry**  
& ASSOCIATES INC.



INFORMATION TECHNOLOGY, INC.

**ibis s2**

## Customer profile; Community National Bank

Community National Bank is located in Northfield, MN just south of the Twin Cities. Northfield is home to both Carleton and St..Olaf colleges (nationally ranked, four-year liberal arts colleges).

They are a small community bank that provides a number of services to their clients, from checking and savings accounts to online banking and numerous other financial services.

Approximately 24,000 accounts

Assets of about 180 million and growing



INFORMATION TECHNOLOGY, INC.

## Reasons for switching to IBM from Unisys

Price/performance of the IBM eServer i5. Their nightly update was taking about 6 hours to complete and with the eServer i5, this has dropped to around 1/2 hour. Also, pricing was very competitive and came in lower than their current vendor at the time.

They also decided to go with IBM because of IBM's reputation in the industry and the iSeries/eServer i5's high degree of uptime.

"I have been very pleased with the performance of the IBM eServer i5 machine. It has allowed me the flexibility to trouble shoot problems as they arise and provide my employees a higher degree of uptime. I can now go home at night and not have to worry about what I'll be walking into the next morning if my update didn't run properly."

Todd Kuehnast, Technology Manager

## Solutions and Customers

Vendor	Application	Business Focus	US	LA	EMEA	AP	Client Example
ERI	Olympic	Private banking, asset management			x		BNP Paribas
Fidelity Info. Services	Horizon	Full service banking	x				R&G Financial
	ACBS	Commercial lending	x	x	x	x	CitiBank
Fiserv CBS Worldwide	CBS	Full service banking	x				North Fork
	ICBS	Full service banking		x	x	x	ING Slaski Bank
Financial Objects	IBIS S2	Wholesale banking			x		
Fiserv ITI	ITI Premier	Full service banking	x				iSeries launch April 2004
Jack Henry	Silverlake	Full service banking	x				Chittenden Bank
		Full service banking	x				
Misys	Equation	Universal retail banking		x	x	x	Piraeus Bank
	Midas	Universal wholesale banking	x	x	x	x	Prva K Bank
Silverlake Systems	SIBS	Universal full service banking			x	x	UOB, OCBC
Temenos	T24	Universal full service banking	x	x	x	x	Sacombank

## Customer profile; ING Bank Slaski

one of the „Top 5” largest banks in Poland  
 9.0+ Billion USD in own funds, HQ in Katowice  
 330 Branches, 557 ATMs,  
 1 Million checking/savings/CD/loan accounts  
 1.4 Million Credit Cards  
 140,000 Internet Banking Accounts  
 Excellent Efficiency Ratio  
 first non-US customer with Rochester SLA  
 active LUG member since 1999



## Solution Topology

Full centralization of IT operations on iSeries  
 4,500 PC Workstations  
 Core Banking: ICBS, MIDAS, ARKSYS  
 7,000+ Lotus Notes Users (single DSD iSeries)  
 24x7x365 operations (MIMIX)

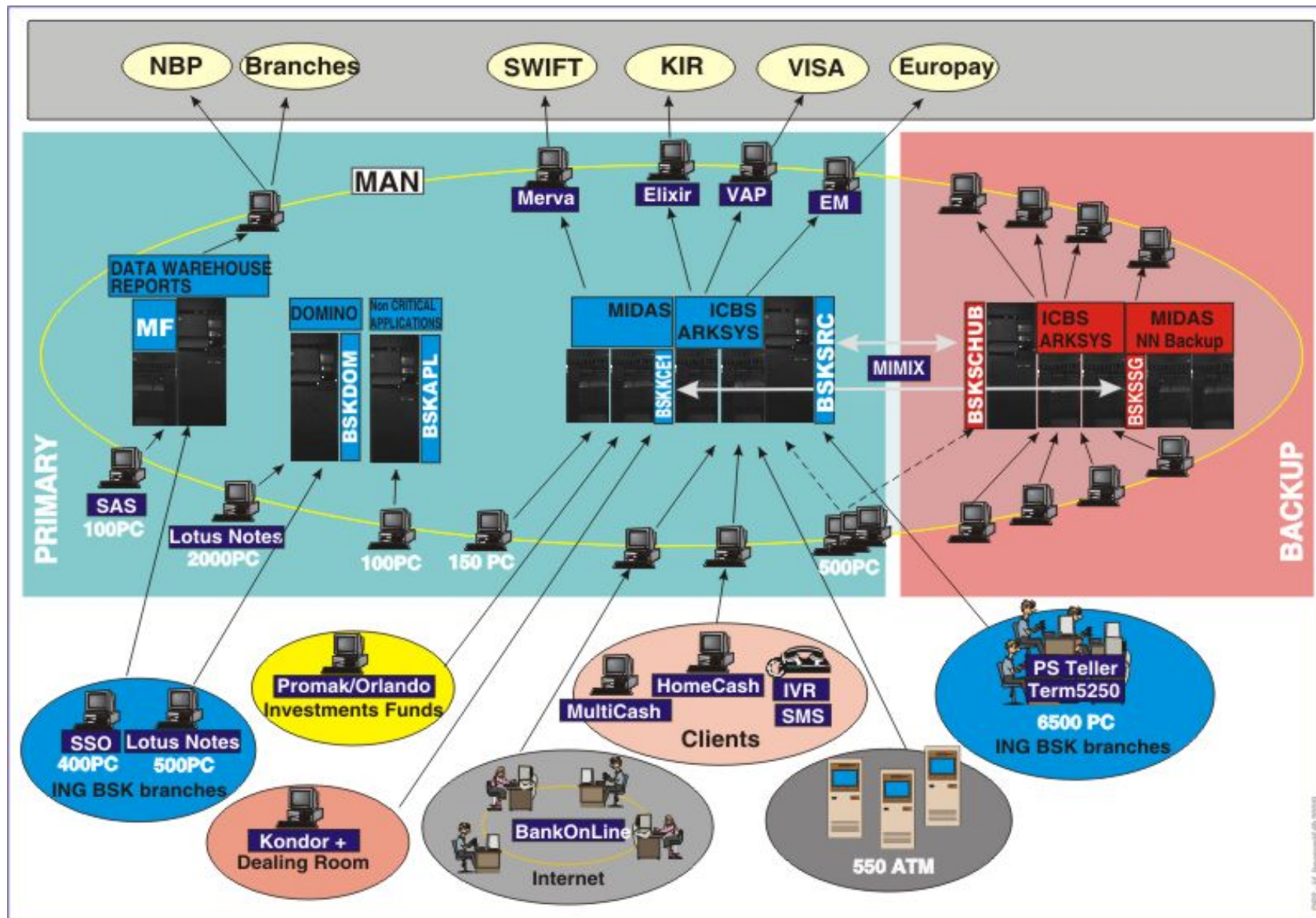
“We run almost all of our Banking operations on an iSeries including our core banking systems; MIDAS, ICBS & ARKSYS. In addition we run Lotus Notes for email, and support all of our ATMs centrally, all on our iSeries platform. This solution topology has enabled us to grow seamlessly with minimal staff and a maximum ROI for the business.

M.Janczarski, IT Manager





# Systems and applications architecture



## Customer profile; Republic Bancorp Inc.

\$5.8 Billion in Assets, 3<sup>rd</sup> largest Bank Holding Company Headquartered in Michigan, 79<sup>th</sup> in U.S.

5<sup>th</sup> Best Place to Work For by Fortune Magazine

Republic Bank subsidiary serves MI, OH & IN with 94 Retail, Commercial & Mortgage Offices

89 ATMs, 93,000 households

892,000 checking/savings/CD/loan accounts

Efficiency Ratio of 47% (vs. peer group at 58%)



## Solution Topology

Host Centric Technology (iSeries & Citrix)

No file servers in branches

Software Solutions: Jack Henry for Banking,

Fiserv Unifi Pro for Mortgage Originations

Fidelity MSP for Mortgage Servicing

24x7x365 operations (MIMIX)

"We run almost all of our banking operation on an iSeries. This includes a best of suite product set from Jack Henry including the core banking system Silverlake, Vertex teller, Streamline platform, Netteller Internet banking and cash management, Yellow Hammer fraud detection, SuperImage check imaging, and partnered solutions for bounce protection, Turnover change control and Mimix high availability. In addition we run Lawson HRIS, ASC SQL Reporting, and NetIQ Security on the iSeries. "

Greg Bixby, VP & CIO, Republic Bancorp Inc.

## Customer Solution:



INFORMATION TECHNOLOGY, INC.

## Customer profile:

- Southern Community Financial Corporation, Winston-Salem, NC
- A \$1.2-billion organization
- "As leaders within their respective fields, a technology partnership between IBM and ITI is a great fit, and really the perfect fit for Southern Community Financial," says Merle Andrews, Executive Vice President. "We've been impressed with the powerful Premier suite of software and services for a long time, but we're also a longtime IBM shop. So when ITI announced that the new Premier was available on an IBM hardware platform, which had never been an option before, that became the deciding factor for us."



## Customer profile:

- Cornhusker Bank, Lincoln, NE
- A \$235-million organization
- 101-year-old, family-owned community bank
- "Keeping up with technological advances helps Cornhusker Bank maintain the high level of personal service expected from a bank so deeply rooted in its community," explains Alice Dittman, Chairman of the Board. "We're looking forward to working with the nation's premier banking technology company, and to making the fullest use of the most advanced software products available. The fact that next-generation Premier now runs on the IBM iSeries platform made the ITI case even more compelling."





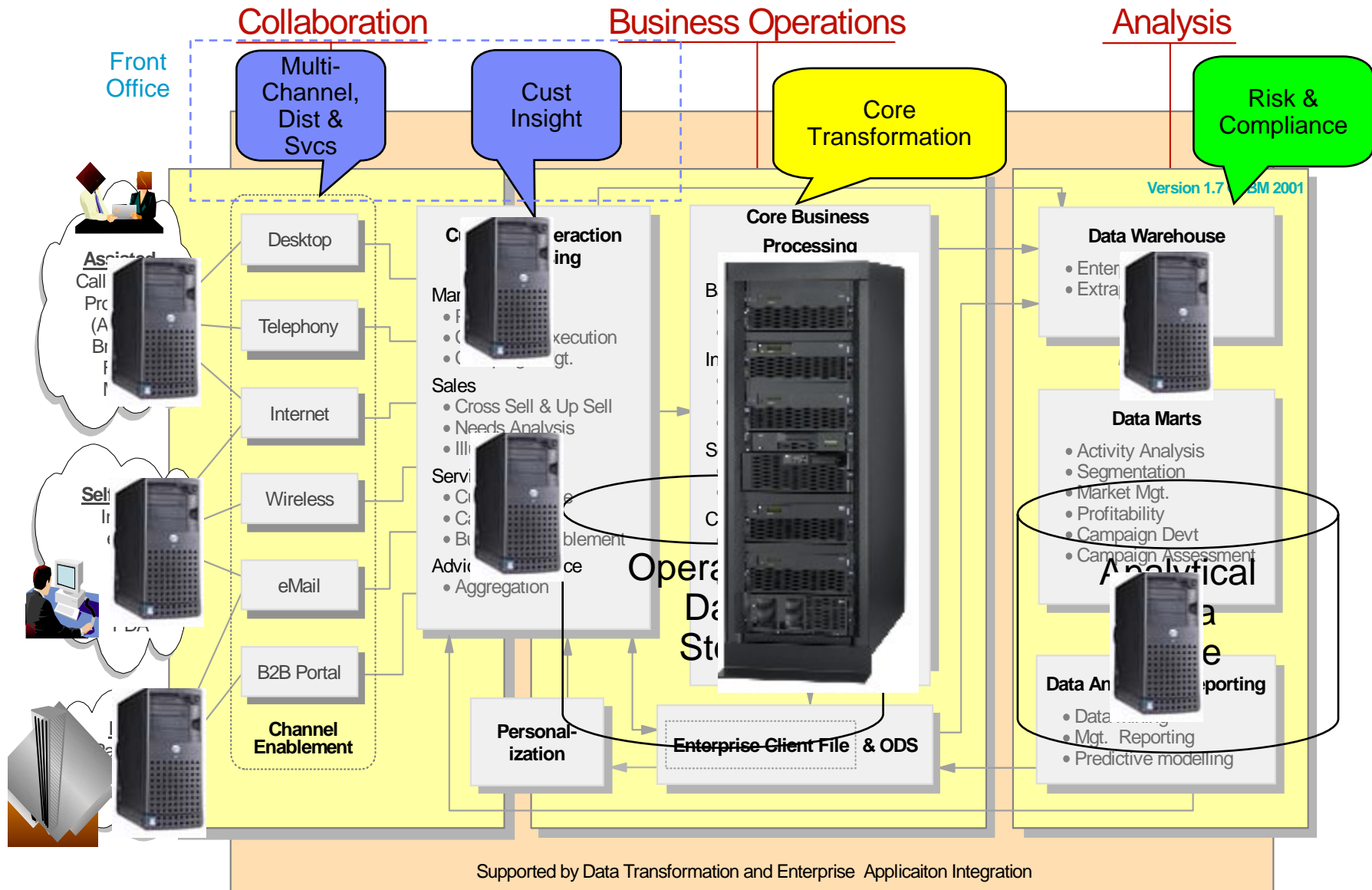
## Point Solution Consolidation – One Server

- **Branch Transformation**
- **Check Image Systems/Check 21**
- **Risk and Compliance Solutions**
- **CRM/BI**
- **Payments Systems**

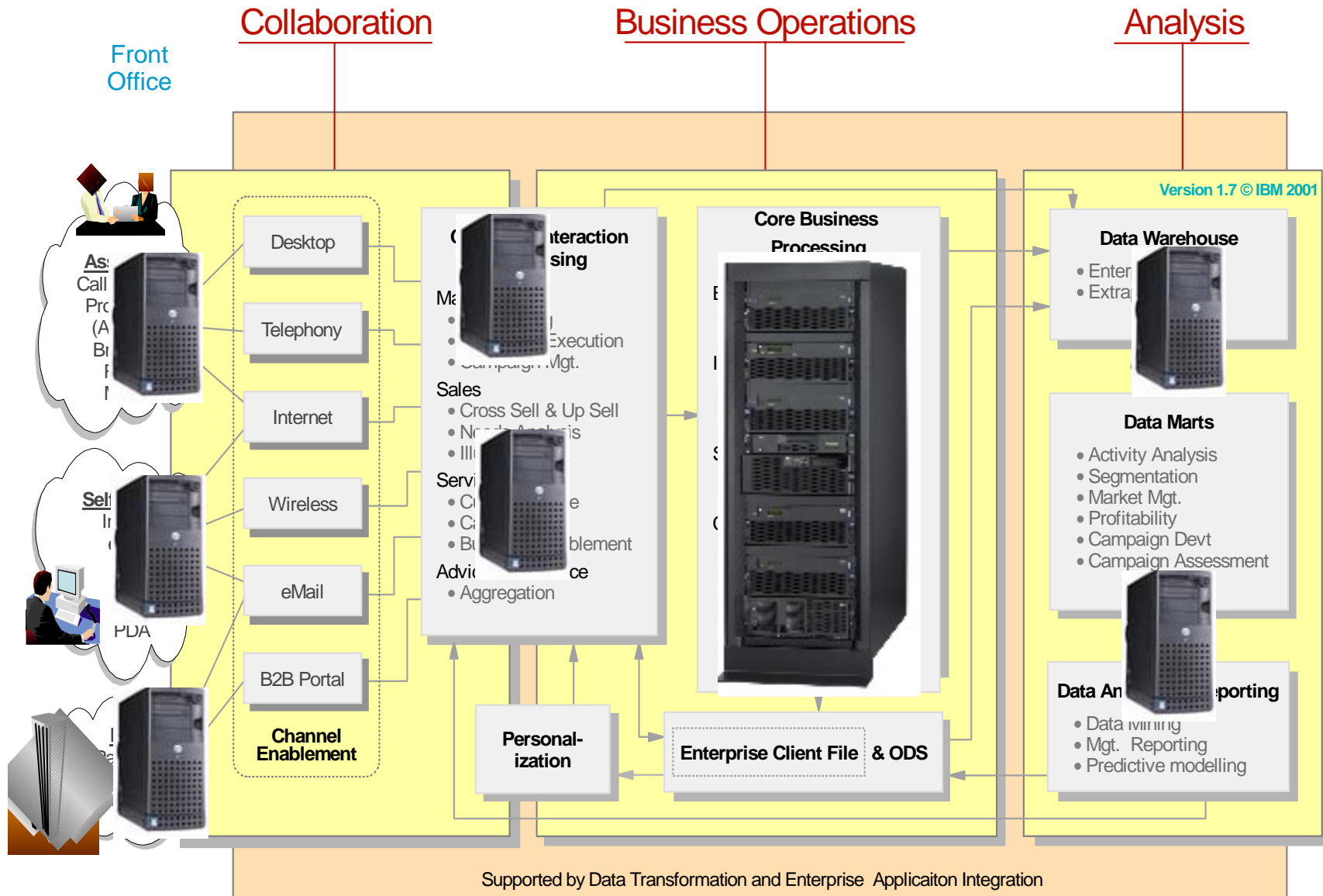




# Common FS Architecture



# Common FS Architecture



Supported by Data Transformation and Enterprise Application Integration

## Simplify The Banking Infrastructure

- **Reduce complexity and costs**

- Pool your resources by managing multiple environments on a single server

- **Handle constant changes**

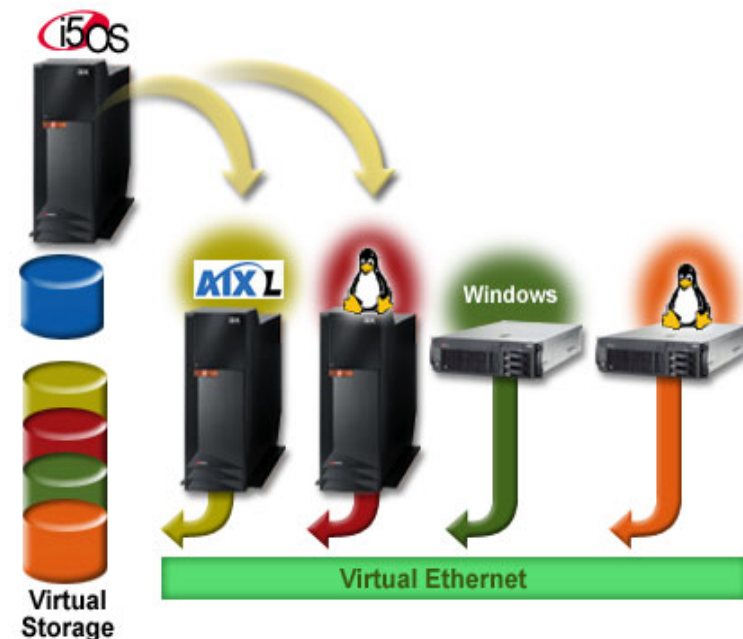
- Automatically respond to changes in processor demand with logical partitioning

- **Save time and money**

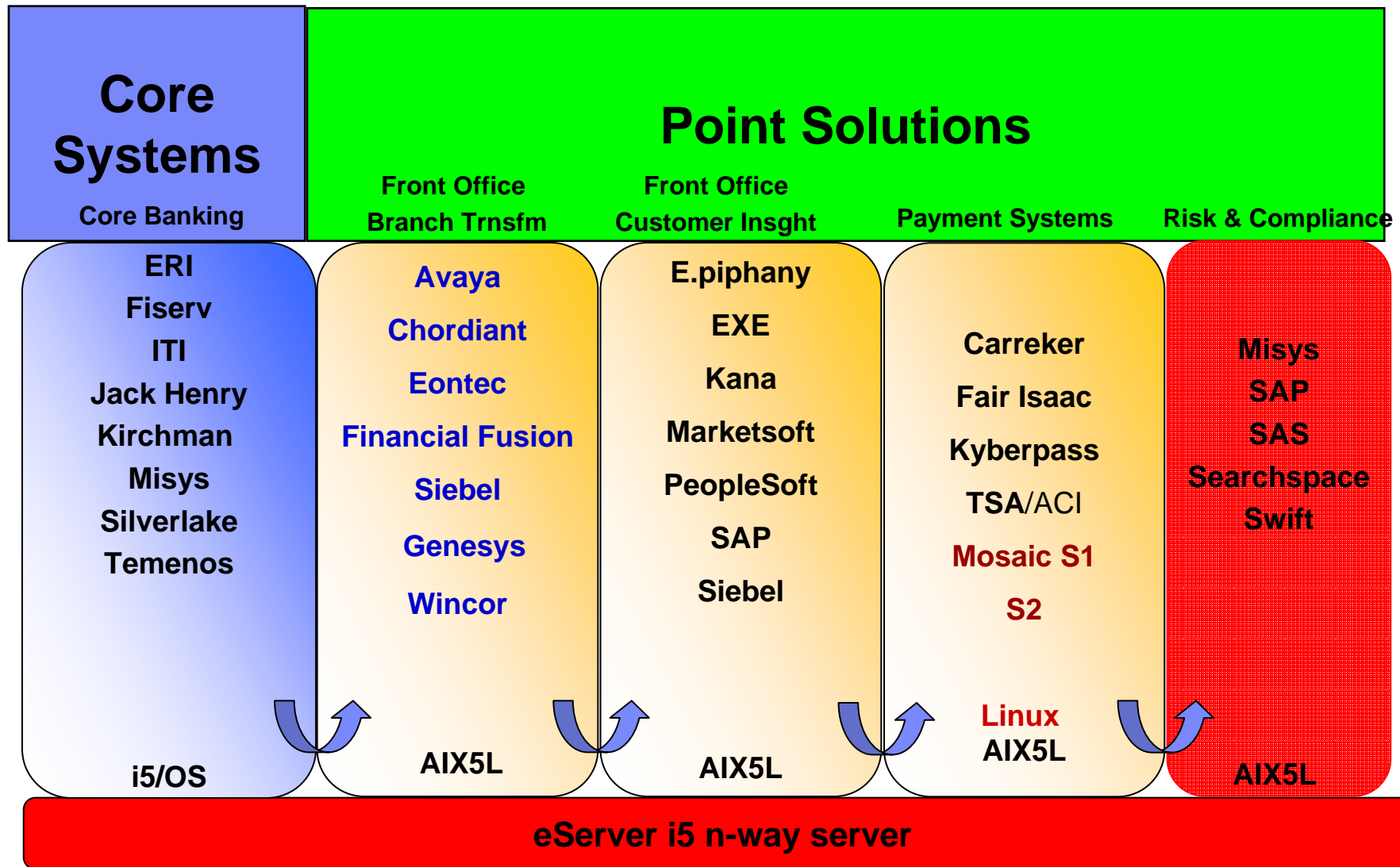
- Simplify management of IT resources with storage virtualization

- **Increase business flexibility**

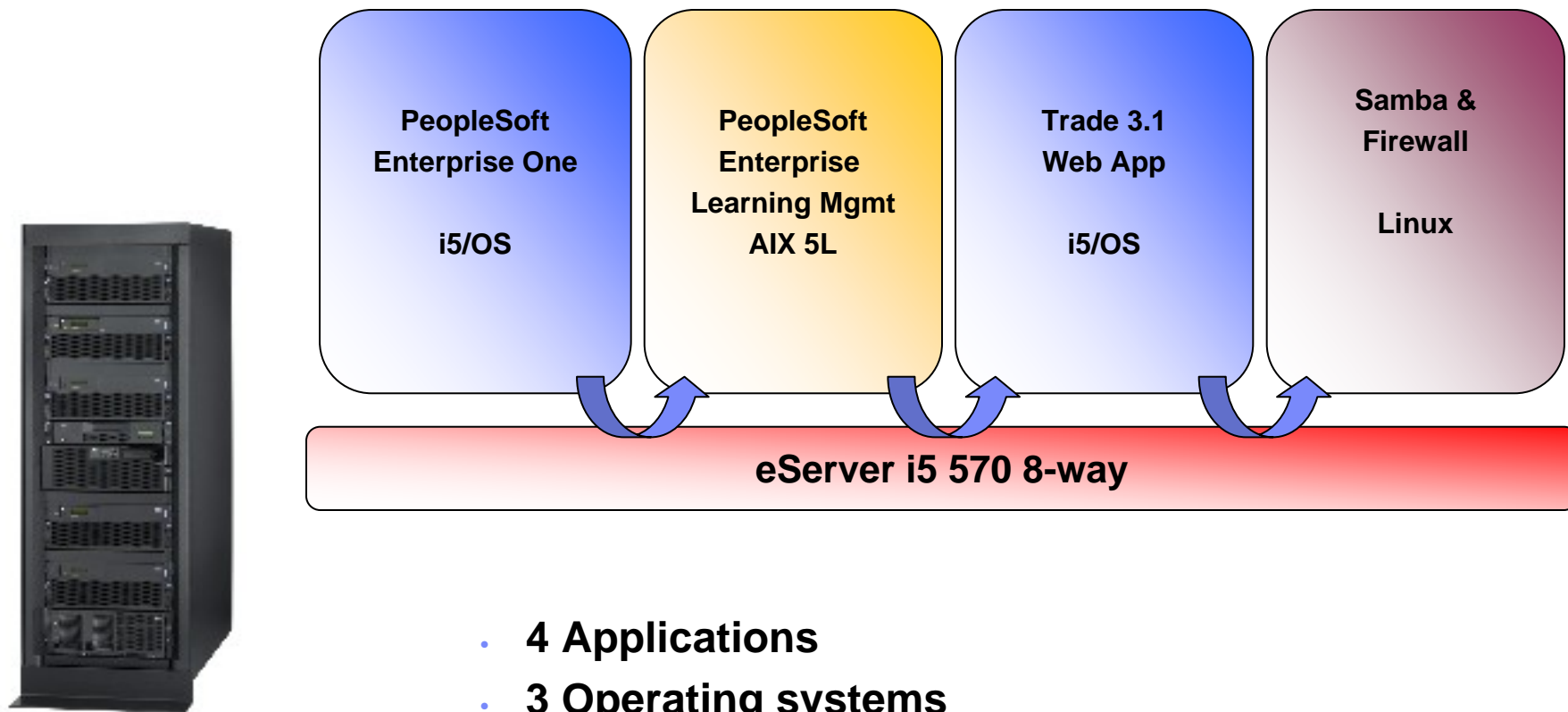
- Expand with broad application portfolio



# iSeries – SOLUTIONS FOR BANKING



## Virtualization Grand Slam Benchmark



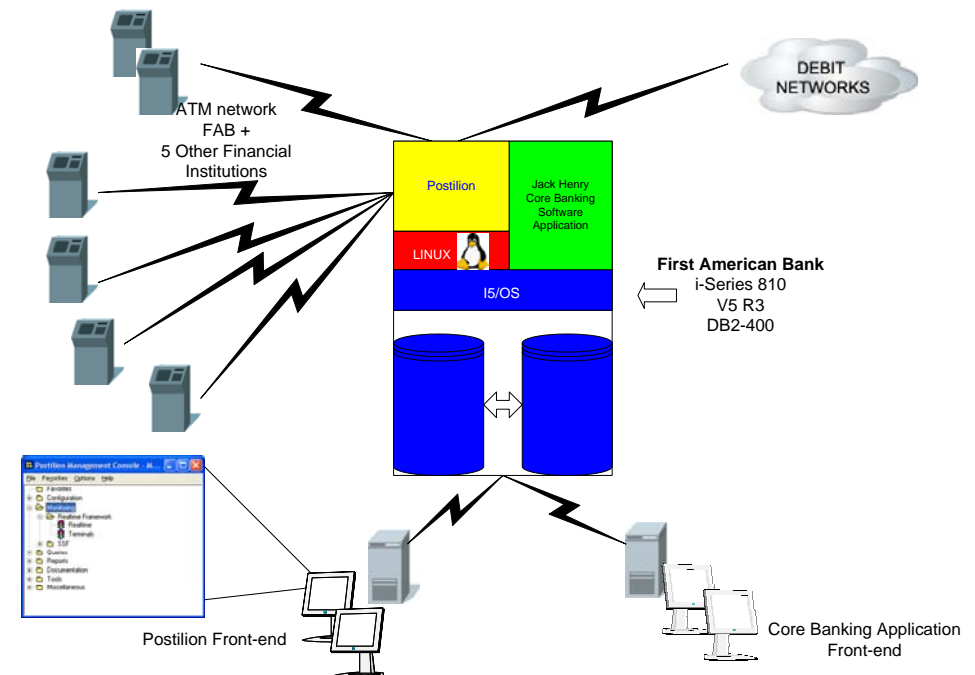
- **4 Applications**
- **3 Operating systems**
- **1 server**
- **0% change in response time**

# ATM Consolidation At First American Bank

“A key challenge in retail banking today is offering better services to our customers while at the same time driving down cost. Using the iSeries enables us to consolidate and integrate our core banking applications with the Mosaic ATM solution on the same platform.”

Noel Levasseur,  
Executive Vice President,  
First American Bank

## Postilion on iSeries





## Consolidation at BNP Paribas



*"The challenge was simultaneously to manage the merger of the three banks and to find, implement and deliver a new solution to handle all banking activity. With more than 40,000 customers, many with multiple accounts, BNP Paribas needed a solution that was rapid to implement and would be totally reliable."*

**Aimé Achard, COO  
BNP Paribas Services**

- Challenge to merge three legacy banking systems into a single, integrated infrastructure
- Solution was to consolidate 3 banks operations onto iSeries with logical partitioning
- Benefits were lower infrastructure and personnel costs, high resilience, and full compliance with stringent data security requirements

## Improve Asset Utilization Rates

***“By centralizing our IT operations on a single platform in a single location, we knew that we could not only reduce the cost of running and maintaining systems, but also accelerate the delivery of new services to our branch network.”***

**João Batista**  
European IT Director  
Banco do Brasil



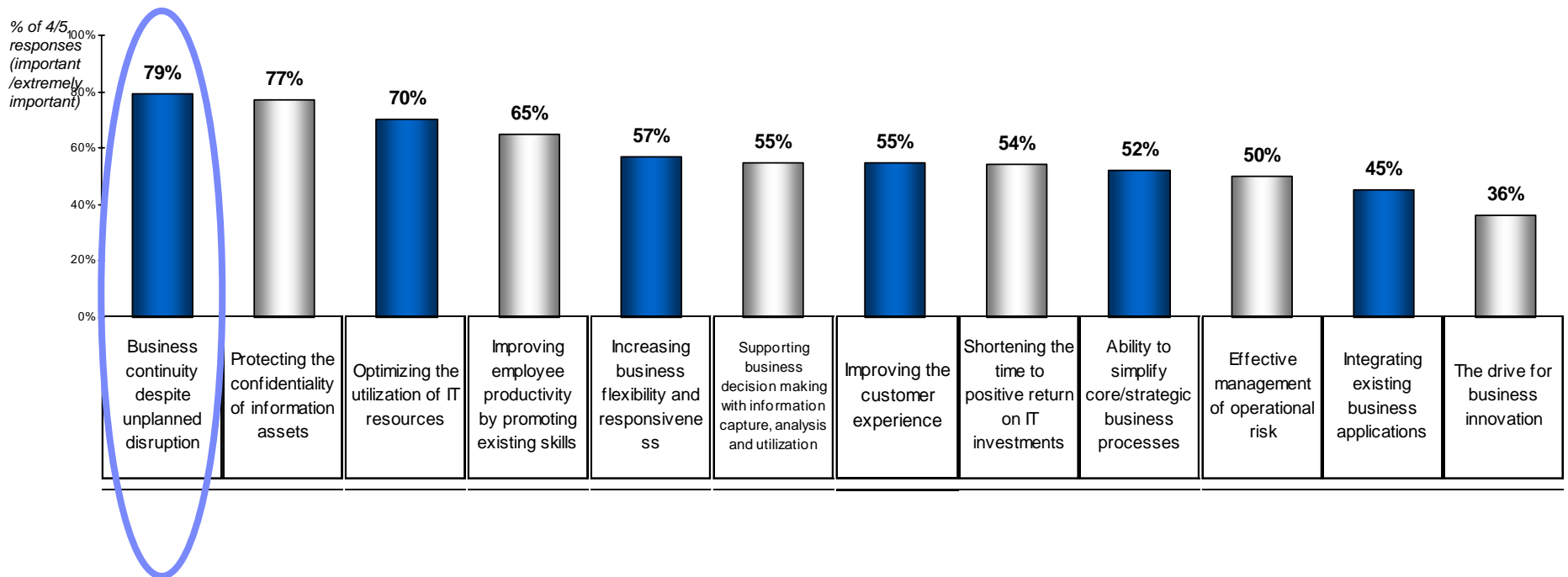
- **i5/OS Logical Partitioning helps improve server utilization rates across multiple workloads with automatic processor balancing**



# Business Continuity

## IT Priorities

- **79% of IT managers say Business Continuity the top priority**



Source: IBM it Trends 1H 04

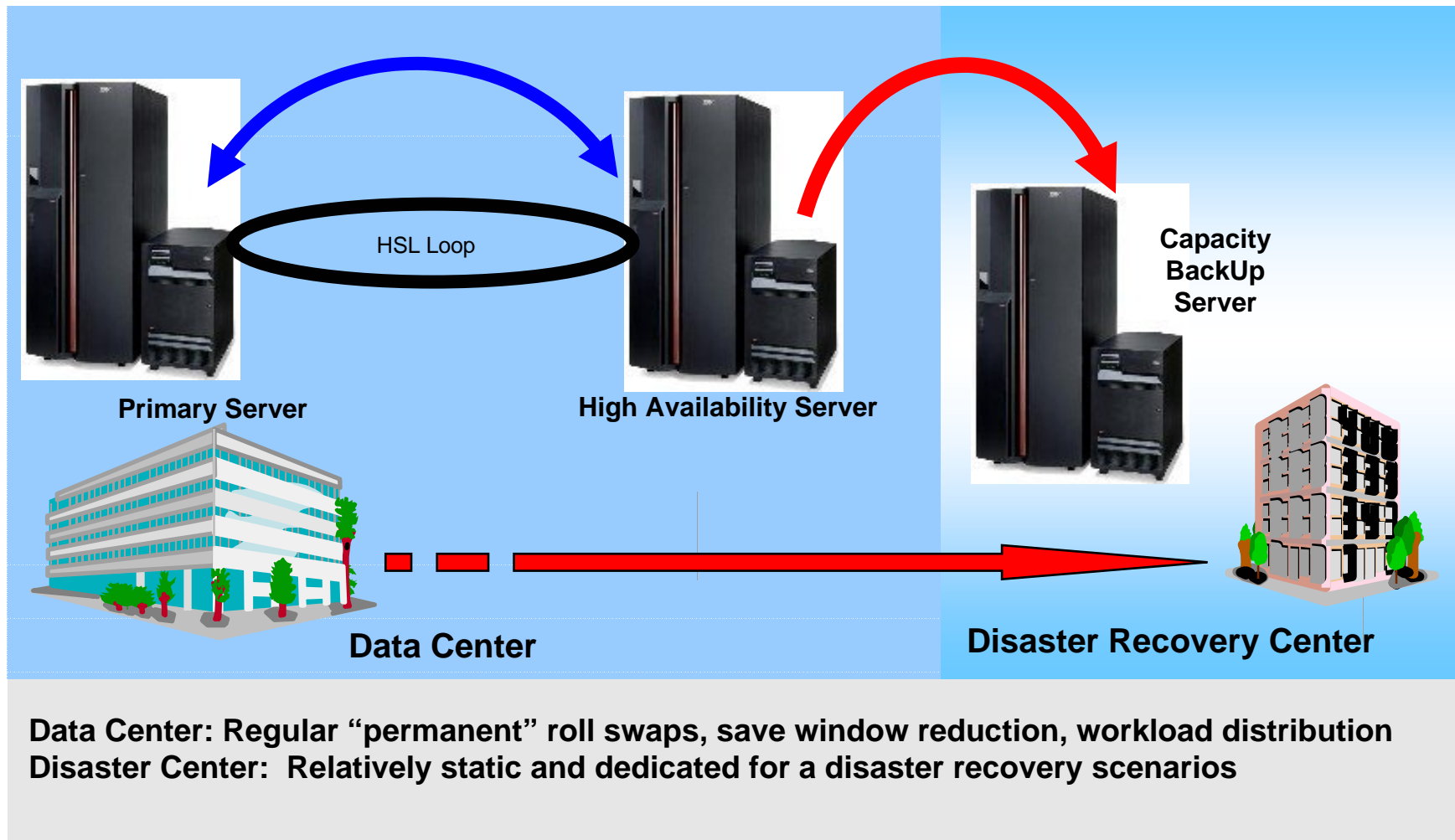
# 100% of Banks

## Marketplace Opportunity - Bank I/T Spend: Drivers of Demand

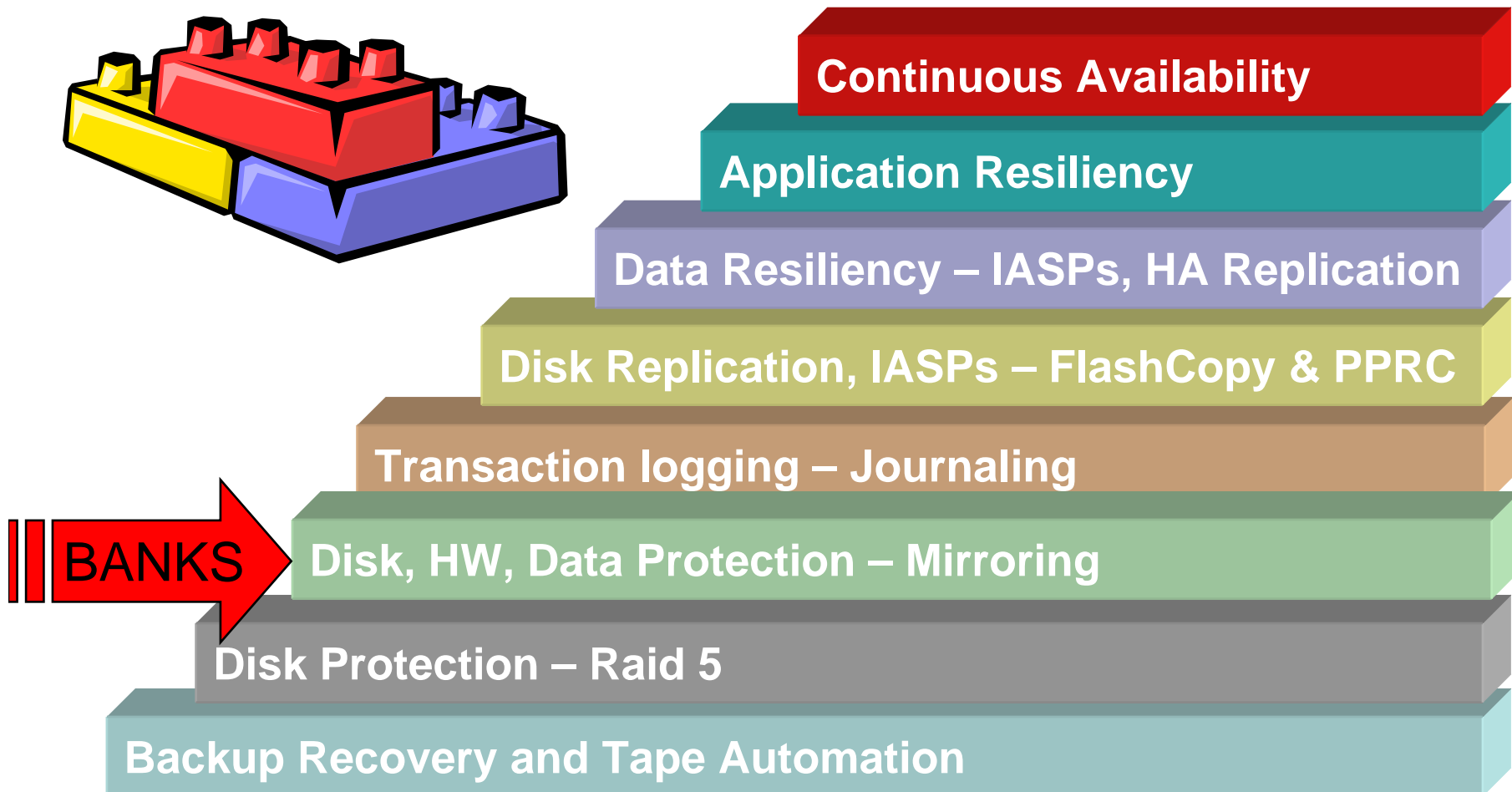
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## Solution Topology for HA – The Best Practice

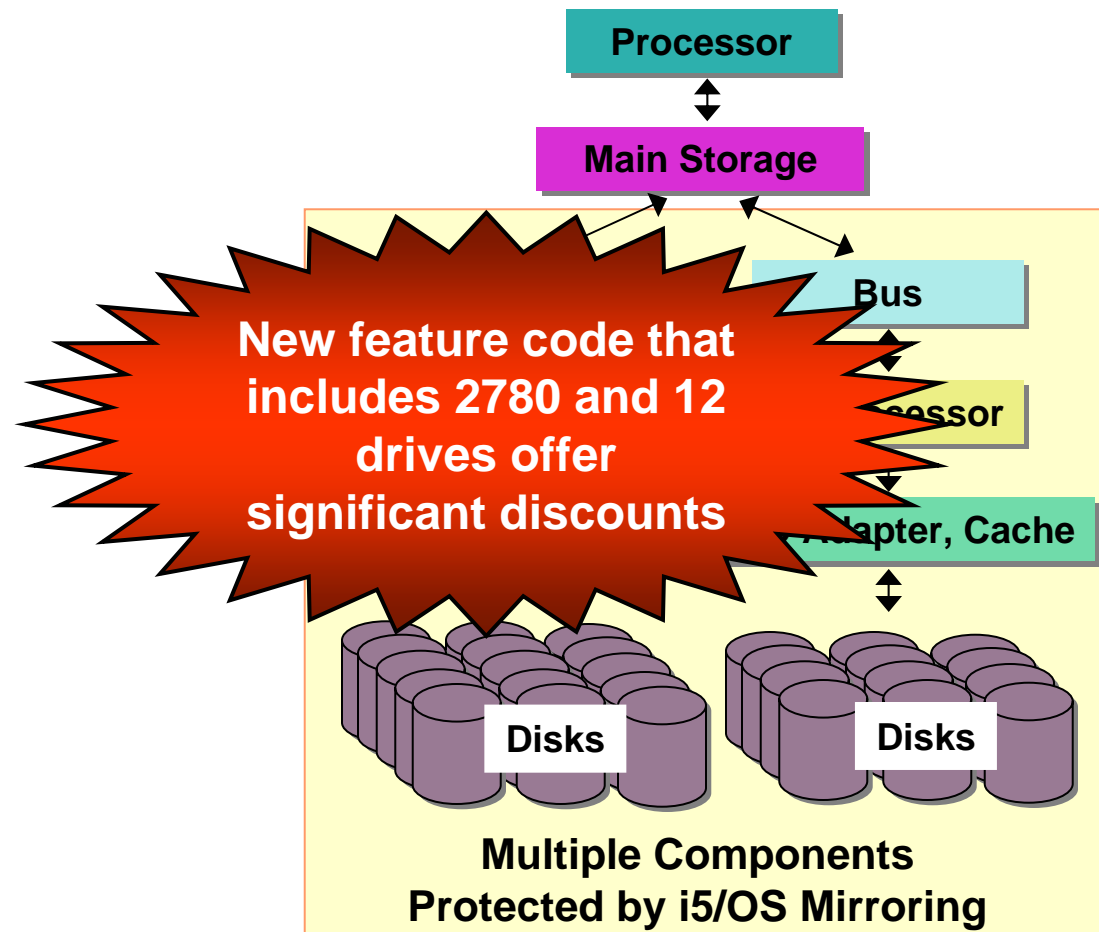
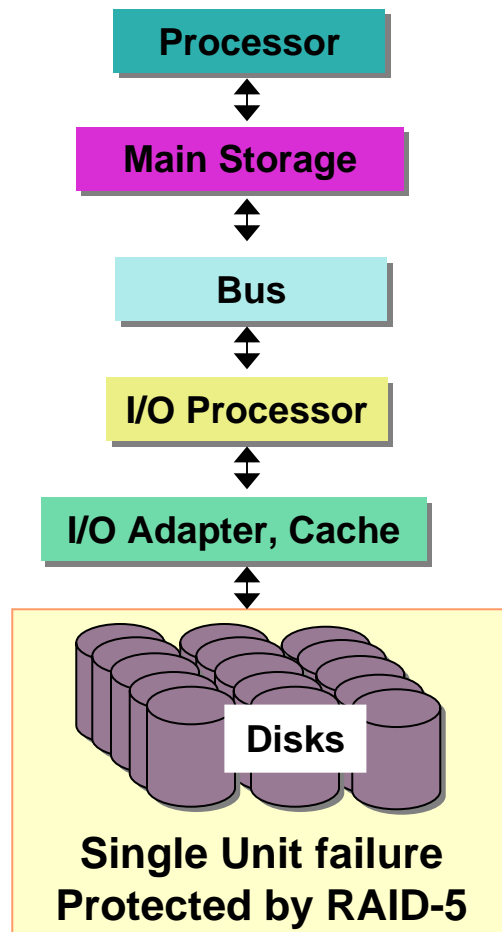


## The Availability Building Blocks



# Disk Mirroring Solution Package for Integrated Disks

*Provide Protection against Single Points of Failure*



## Attractive Mirroring Solution for High Availability

Configuration*	Sys Config with RAID Before	Sys Config with Mirror Before	%Diff Before	Sys Config with 50% Disc	%Diff Now
Model 570 Standard Edition with 1.9TB	\$506K	\$674K	33%	\$553K	9%
Model 570 Enterprise Edition with 1.9TB	\$1192K	\$1360K	14%	\$1239K	4%
Model 870 Enterprise Edition with 1.9TB	\$850K	\$1004K	18%	\$872K	3%
Model 890 Enterprise Edition with 2.9TB	\$1904K	\$2102K	10%	\$1932K	1%

\*NOTE: All sample disk configurations based on usable capacity utilizing 35.16GB 15K RPM drives and 2757 / 2780 disk controller.

All prices and discounts shown here are preliminary US prices for new system configurations as of Oct 2004, and are subject to change without prior notice. Prices or discounts may vary by geography.



## iSeries Business Continuity Offerings



### IBM HA Express Portfolio on iSeries

- **Models 520, 810 & 825**
- **Support mission critical 24x7 environments**
- **Minimize planned and unplanned downtime**
- **Minimize save window**
- **Lower complexity and cost**



### iSeries for High Availability Offering

- **Models 570, 870 & 890**
- **Support mission critical 24X7 environments**
- **Role swapping and workload distribution**
- **Minimize planned & unplanned downtime**
- **Support Heterogeneous Environments**



### iSeries for Capacity BackUp Offering

- **Designed for disaster recovery scenarios**
- **Not intended for 24x7 HA solutions**
- **Not intended for workload distribution**
- **No option to permanently activate standby processors**

ISV Name	Application Name	Business Focus	US	LA	EM EA	AP	web site
Adtek Information Systems, Inc.	BankMate	Universal full-service banking	X				<a href="http://www.adtek.com">http://www.adtek.com</a>
BML Istisharat	ICBS	Retail & Wholesale Banking	X		X		<a href="http://www.istisharat.com">http://www.istisharat.com</a>
CBA	IBAS	Universal full-service banking			X		<a href="http://www.cba.no">http://www.cba.no</a>
DataPro, Inc.	Integrated Banking System (IBS)	Universal full-service banking	X	X	X		<a href="http://www.datapro-miami.com">http://www.datapro-miami.com</a>
ERI BANCAIRE SA	Olympic International Integrated Banking Software (UK)	Universal full-service banking			X		<a href="http://www.eri.ch">http://www.eri.ch</a>
ERI BANCAIRE SA	Olympic Banking System (DE)	Universal full-service banking			X		<a href="http://www.eri.ch">http://www.eri.ch</a>
Fidelity Information Services, Inc. (formerly Alltel Information Services, Inc.)	Horizon Banking System	Full service banking	X				<a href="http://www.fidelityinfo-services.com">http://www.fidelityinfo-services.com</a>
Fiserv CBS Worldwide	Fiserv International Comprehensive Banking System (ICBS)	Full service banking	X	X	X	X	<a href="http://www.fiservcbs.com">http://www.fiservcbs.com</a>
i-flex solutions ltd.	FLEXCUBE @	Universal full-service banking	X	X	X	X	<a href="http://www.iflexsolutions.com">http://www.iflexsolutions.com</a>
Jack Henry & Associates, Inc.	CIF 20/20	Full service banking	X				<a href="http://www.jackhenry.com">http://www.jackhenry.com</a>
Jack Henry & Associates, Inc.	SILVERLAKE SYSTEM (R)	Core for Commercial Banking	X				<a href="http://www.jackhenry.com">http://www.jackhenry.com</a>
Misys International Banking Systems Limited	Midas	Universal Wholesale Banking	X	X	X	X	<a href="http://www.misys.com">http://www.misys.com</a>
Misys International Banking Systems Limited	Equation	Universal Retail Banking		X	X	X	<a href="http://www.misys.com">http://www.misys.com</a>
SIAF Millenium	SIAF Millenium	Full service banking				X	<a href="http://www.siafmillennium.com.ve">http://www.siafmillennium.com.ve</a>
Silverlake System Europe LTD	Silverlake Integrated Banking Solution (SIBS)	Universal full-service banking			X	X	<a href="http://www.silverlake.hu">http://www.silverlake.hu</a>
Temenos Headquarters SA	TEMENOS T24	Universal full-service banking	X	X	X	X	<a href="http://www.temenos.com">http://www.temenos.com</a>

## White Papers etc

- **IDC Report (Financial Insights Whitepaper)**

- Transformation Meets The Banking Industry, Which Banks Are Ready For the 21<sup>st</sup> Century
- Bank Mandiri: Aligning IT With Key Business Objectives
- [ftp://ftp.software.ibm.com/common/ssi/rep\\_wh/n/ISW00295USEN/ISW00295USEN.PDF](ftp://ftp.software.ibm.com/common/ssi/rep_wh/n/ISW00295USEN/ISW00295USEN.PDF)

- **Redbook**

- Banking on IBM eServer iSeries i5 and iSeries (<http://www.redbooks.ibm.com>)

- **More Reference Material**

- [ftp://ftp.software.ibm.com/common/ssi/rep\\_wh/n/ISW00295USEN/ISW00295USEN.PDF](ftp://ftp.software.ibm.com/common/ssi/rep_wh/n/ISW00295USEN/ISW00295USEN.PDF)
- <http://www-306.ibm.com/software/success/cssdb.nsf/CS/HCTD-5MBV5V?OpenDocument&Site=eserveriseries>
- <http://www-306.ibm.com/software/success/cssdb.nsf/CS/DNSD-62LL4Y?OpenDocument&Site=eserveriseries>
- <http://www-306.ibm.com/software/success/cssdb.nsf/CS/DNSD-5QJKN3?OpenDocument&Site=eserveriseries>
- <http://www-306.ibm.com/software/success/cssdb.nsf/CS/NAVO-5NP26U?OpenDocument&Site=eserveriseries>

## Resources to Help You Sell Banking Solutions - AG

### Banking Industry Contacts

■ Stuart Bilick - Finance Industry Segment Executive	8-277-6672
■ Natalie Keehbauch- Finance Industry Marketing Manager	8-542-5890
■ Bill Stampfl BCS East Region SMB Finance Industry Support	8-648-8552
■ John Pierce BCS Central and West Region SMB Finance Industry Support	8-896-3725
■ Richard Gale, Eastern Region SMB Banking Territory Marketing Manager	212-745-3352
■ Matt Minarik, Central Region SMB Banking Territory Marketing Manager	8-652-5254
■ Patty Robb, Western Region SMB Banking Territory Marketing Manager	8-642-6973

### Addition Information

■ SMB Sales Advisor Banking;	<a href="http://w3.ncs.ibm.com/SMB-Banking">http://w3.ncs.ibm.com/SMB-Banking</a>
■ Medium Business Center Banking External Website	<a href="http://www-1.ibm.com/businesscenter/us/industries/financial/">http://www-1.ibm.com/businesscenter/us/industries/financial/</a>
■ Financial Services Sector Internal Website	<a href="http://w3-1.ibm.com/industries/financialservices/finsect.nsf?OpenDatabase">http://w3-1.ibm.com/industries/financialservices/finsect.nsf?OpenDatabase</a>
■ Financial Services Sector External Website	<a href="http://www.ibm.com/industries/financialservices">http://www.ibm.com/industries/financialservices</a>

### Additional Education

■ Banking Industry Skills Roadmap	<a href="http://w3.ncs.ibm.com/smb.nsf/SMB/AMER-5S7PV2?OpenDocument&amp;Area=SMBAmericas">http://w3.ncs.ibm.com/smb.nsf/SMB/AMER-5S7PV2?OpenDocument&amp;Area=SMBAmericas</a>
■ Banking Sales Compass Education	<a href="http://w3-03.ibm.com/sales/compass/industry/lc/bankingqv.nsf/Pages/HomePage">http://w3-03.ibm.com/sales/compass/industry/lc/bankingqv.nsf/Pages/HomePage</a>

## Resources to Help You Sell Banking Solutions -EMEA

- Mark Chetwood, Director, Banking Industry EMEA
- Philip Crompton, FSS EMEA Marketing Mgr
  
- Dietrich Roessner, Director, FSS CEMA
- Svend Erik Nielsen, Solution Sales and Business Development Exec', CENTRAL Region
- Eddie Keal, Business Development Mgr, NORTH Region
- Kim Brink, VP, FSS NORDICS
- Alberto Lanfranco, Solution Sales Exec', FSS SOUTH Region
- Didier Fauque, VP, FSS WEST Region
  
- Martin Newman, STG Sales Mgr, FSS EMEA
- Peter Hitzel, Brand Sales Mgr, FSS EMEA

## URLs

- **FinNet**

- <http://w3-1.ibm.com/industries/financialservices/finsect.nsf>

- **ContactPoint**

- <http://w3.ncs.ibm.com/sitelet.nsf/ondemand/JSHW-5PQNCD?OpenDocument>

- **System Sales**

- [http://w3-1.ibm.com/sales/systems/portal/\\_s.155/253](http://w3-1.ibm.com/sales/systems/portal/_s.155/253)

- **eServer Solution Connections (eSC)**

- <http://www-1.ibm.com/servers/solutions/finder/CSFServlet.wss?mvcid=main&packageid=1000>

- **ISV Solution Link**

- <http://w3.developer.ibm.com/isvsolutionlink/index.html>

- **e-Business Advisor (e-Business on demand, on demand customer references)**

- <http://w3.ncs.ibm.com/myadvis.nsf/home?OpenForm&id=urhome>

- **On demand customer references**

- <http://w3.ibm.com/ondemand/customers/index.html>

- **Redbook Paper “e-Business on demand Operating Environment” Bart Jacob**

- <http://w3.ncs.ibm.com/cspaper.nsf/HTitle/0CWCE-5PNRHF?OpenDocument>

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\* Please contact the person identified for each industry. They will connect you to the right team member

## Additional Resources For HA

- **iSeries HA External Website**

- Several HA articles available such as; **HA 101**
- [www.ibm.com/eserver/series/ha](http://www.ibm.com/eserver/series/ha)

- **iSeries HA Sales Kit**

- <http://w3-1.ibm.com/sales/systems/portal/s.155/254?navID=f220s240&geolD=All&prodID=iSeries&docID=ihask.skit&docType=SalesKit&skCat=DocumentType>

- **iSeries for HA/CBU**

- <http://www-1.ibm.com/servers/eserver/series/hardware/is4ha>
- <http://www-1.ibm.com/servers/eserver/series/hardware/is4cbu>

- **IBM Redbooks**

- i5/OS High Availability Clusters: Data Resilience Solutions
- <http://www.redbooks.ibm.com>



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  - **IBM eServer & TotalStorage Business Partner Technical Sales Support Resources** An electronic brochure with hotlinks to resources for selling, installing and supporting IBM and IBM TotalStorage solutions.  
<http://www.ibm.com/partnerworld/images2/eServerTotStorTechSalesSupv4-3.pdf>
  - **IBM TotalStorage Technical Support Resource Guide** An electronic guide with links to resources for selling and supporting IBM TotalStorage solutions.  
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  - **IBM Technical Support Knowledge Bases and eSupport**  
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<http://www.ibm.com/partnerworld/images2/eServerTotalStorageTechSupKnowBase/sv1-0.pdf>

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