

IBM Content 2014

Information. Insights. Results.



IBM ECM Strategy and Roadmap

Rich Howarth

*Vice President, Products and Strategy
IBM Enterprise Content Management*

September 16th 2014 - Portland



Business content is at the heart of every organization



Traditionally, organizations have managed this content in a *warehouse model*

But, the full value inside remains locked away



Storing



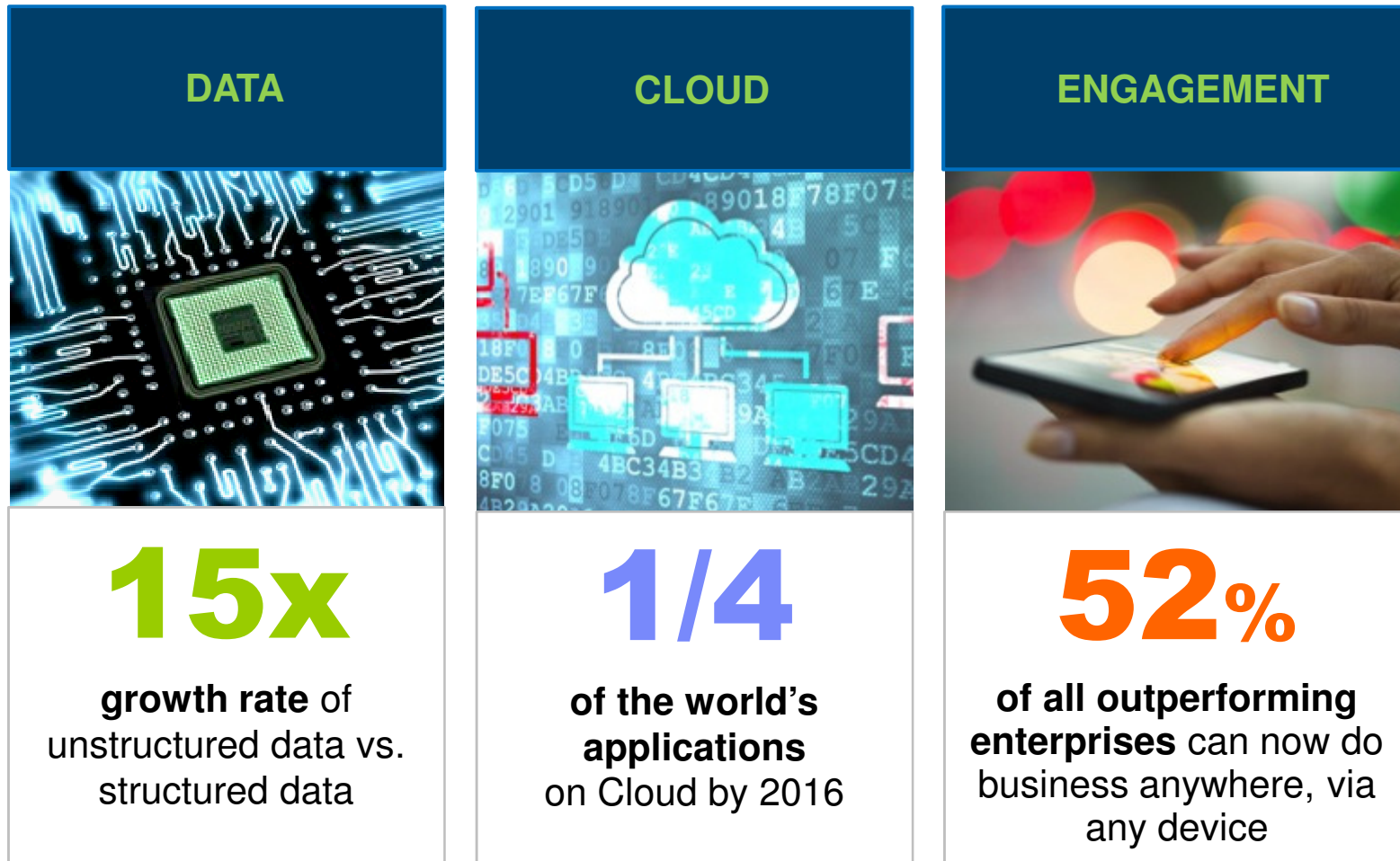
Securing



Retrieving

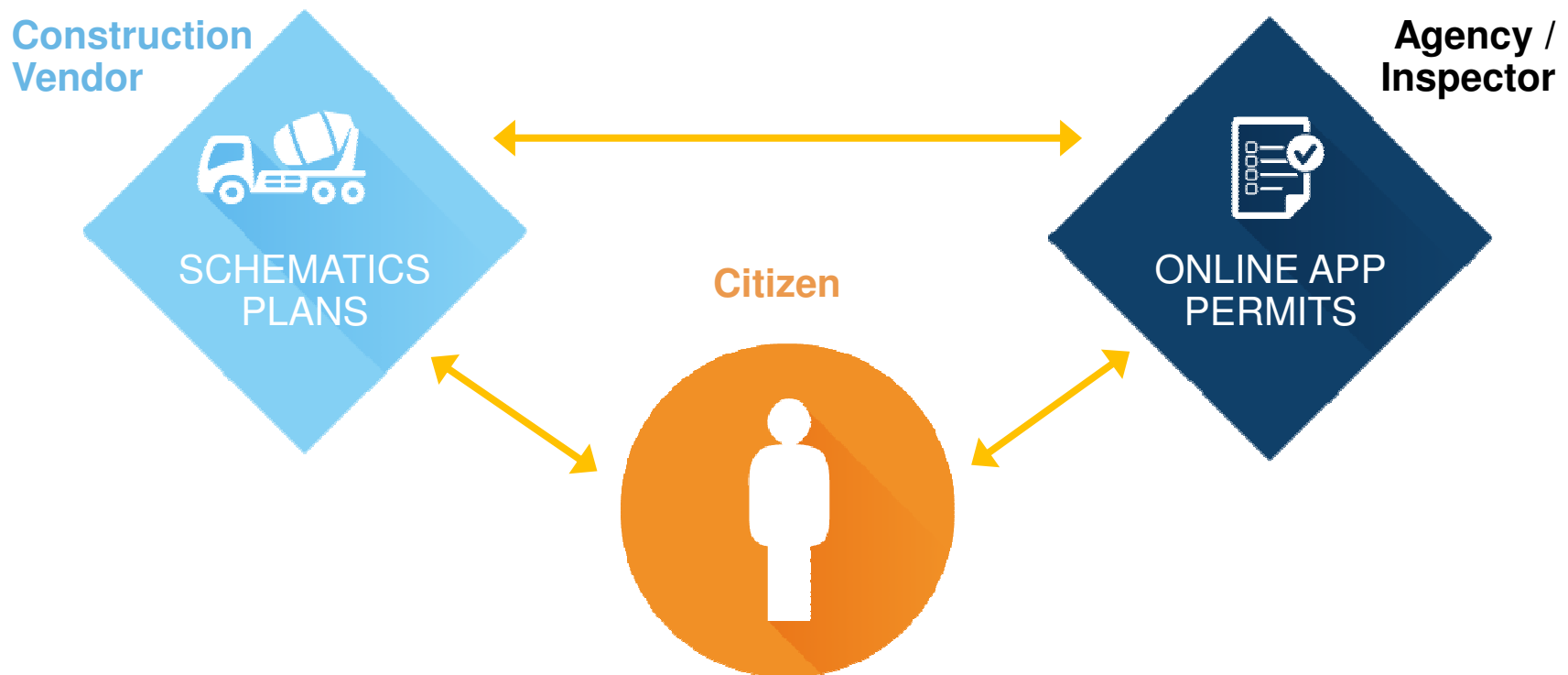
The volume, forms and sources

of business content have shifted dramatically...and so has the opportunity to create new value



New opportunities to create value for clients and citizens are driven through content

How do I get the permits needed to expand my business?



A new approach

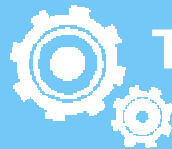
puts business content to work and allows organizations to realize new value



SOURCE

Content:

- In many forms
- From many sources
- Understood, described & secured



TRANSFORM

Adding value by:

- Identifying the right content
- Using only what's needed
- Preparing it for use



DELIVER

The right information:

- To the right person
- At the right time
- In the right form

United Overseas Bank

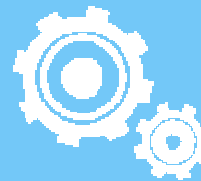


25%

reduced work to
execute International
wire transfers



Streamlined capture and
high volume data



Content is classified,
managed and analyzed
in real time



Information delivered
in dashboards and
prioritized cases

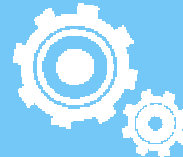
Ceva Logistics



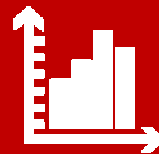
...significant TCO savings by reducing staffing, infrastructure and operation costs, while improving operational efficiency and customer service



Manage the lifecycle of content – from capture to collaboration & workflows



Content Systems are extended to Cloud via CMIS



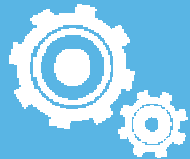
Logistics content captured and delivered anywhere



TIAA-CREF



Efficiency in processing distributions/ withdrawals with shorter turnaround enhanced client experience



Adaptive case templates provides a platform to rollout new processes



Excellence in Banking and Financial Services
2014 Workflow Management Coalition Award



...Content in context and case analytics helped management to monitor work for optimized outcomes and to identify cross/up-sell opportunities.

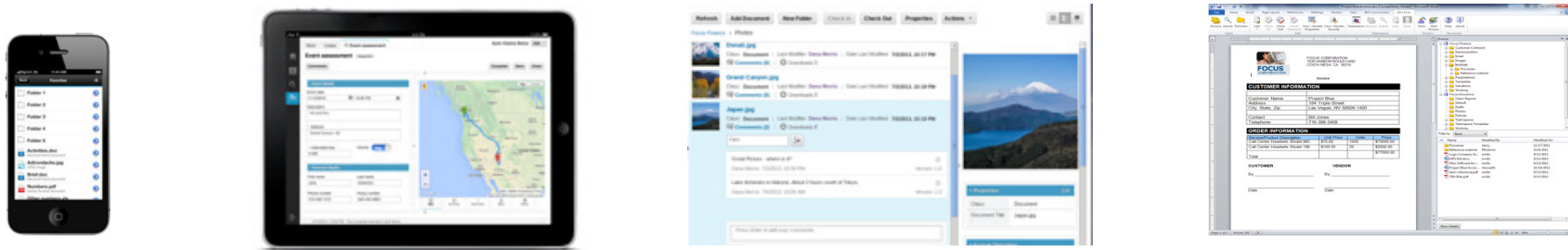
IBM ECM continues to lead the market



Source: Gartner, Magic Quadrant for Enterprise Content Management, 23 September 2013, G00253757

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IBM Navigator on Cloud



Cloud

Improves knowledge-worker productivity by delivering cloud-based document management for teams and the ability to sync the latest version of content across mobile, desktop and web.

Advantage for clients

Modern, easy to use web experience
Built on IBM's robust ECM technology

- SaaS application in IBM Marketplace
- Designed for medium to large enterprises
- Same user experience as on premise IBM ECM
- The base for future SaaS applications



IBM delivers trusted information, in the context of critical processes, through a unified user experience



IBM Content Navigator

IBM Content Navigator UI

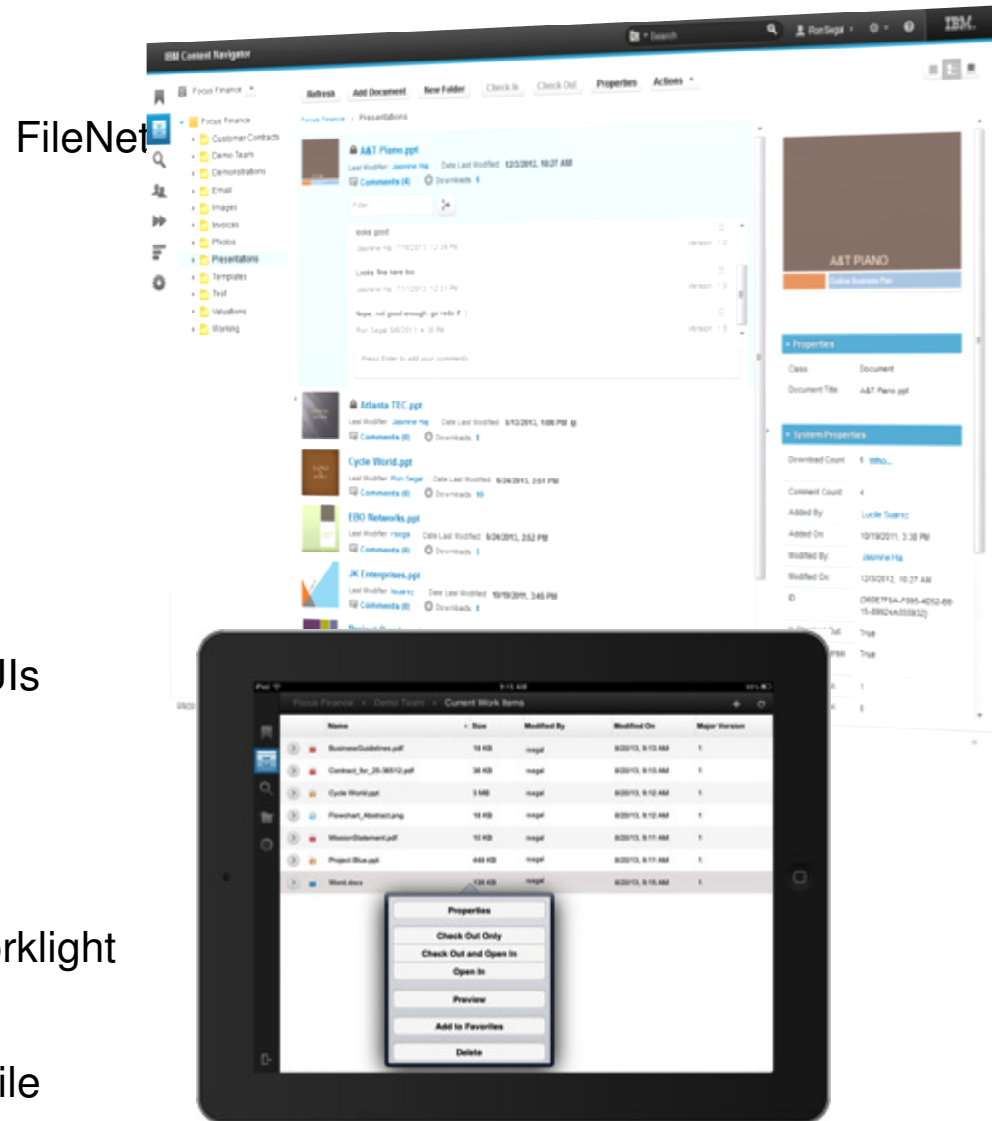
- Modern HTML 5 client for CM8 and CM OnDemand
- CMIS repository support
- External data integration
- Enterprise search / facets

IBM Content Navigator Framework:

- Visual component toolkit
- Extend Navigator out of the box interface
- Quickly build & integrate custom apps / UIs
- Consistent design across IBM products

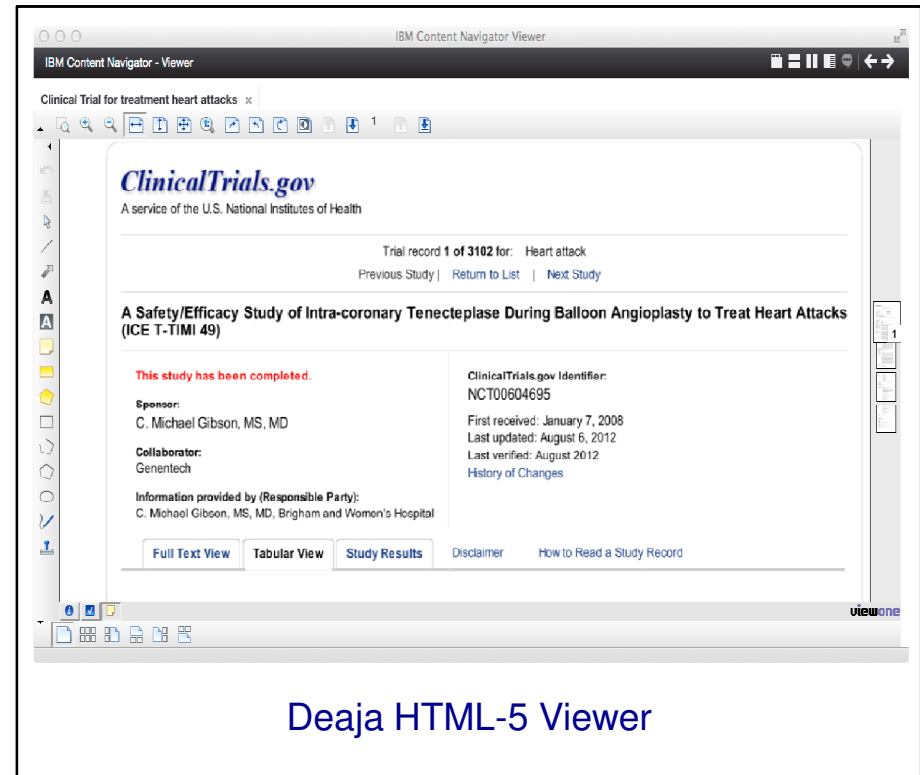
Mobile and Office:

- Work with content across devices via Worklight
- Microsoft Office integration
- Secure file transfer to anyone via QuickFile



Content Navigator 2.0.3 – Just Released !

- Bi-directional file synchronization
- Entry templates for FileNet and CM8 including property layout capability
- Check-out/check-in simplification (e.g. tracking of check-outs)
- Compound document navigation and viewing
- Custom theming – without writing code
- Support for new social capabilities
- Cross repository search for CMIS repositories
- Deaja HTML-5 Virtual Viewer
- Many additional APIs and customizations
- Improved URL addressability
- SharePoint Web Parts
- Support for Image Services



IBM Content Navigator 2.03

IBM Content Navigator
rowarth
?

- Focus Finance
 - Contracts
 - Demonstrations
 - Invoices
 - Photos
 - Presentations
 - Samples
 - Users
 - Valuations

Refresh
Add Document
New Folder
Actions

Focus Finance > Samples

2014 NTE Report on FTB.pdf
Modified By: p8admin | Modified On: 8/4/2014, 10:48 AM
You like this | Downloads: 22 | Tags: None | Comments: 0

Birth certificate: Richard_waters.jpg
Modified By: p8admin | Modified On: 8/1/2014, 5:43 PM
1 person likes this | Downloads: 13 | Tags: None | Comments: 1

Birth_Certificate: John_Hansen.gif
Modified By: p8admin | Modified On: 8/1/2014, 5:50 PM
No one has liked this yet | Downloads: 12 | Tags: None | Comments: 0

ClaimReport:Lee_Thomlin.pdf
Modified By: p8admin | Modified On: 8/1/2014, 5:50 PM
No one has liked this yet | Downloads: 22 | Tags: None | Comments: 0

Clinical Trial for treatment heart attacks
Modified By: p8admin | Modified On: 8/1/2014, 3:45 PM
No one has liked this yet | Downloads: 14 | Tags: None | Comments: 0

ClinicalTrials: Treat Heart Attacks .pdf
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No one has liked this yet | Downloads: 21 | Tags: None | Comments: 0

ClinicalTrials; Treatment of Acute Myocardial Infarction.pdf
Modified By: p8admin | Modified On: 8/1/2014, 5:43 PM
No one has liked this yet | Downloads: 15 | Tags: None | Comments: 0

Driver License- Nick Sample.jpg
Modified By: p8admin | Modified On: 8/1/2014, 5:40 PM
No one has liked this yet | Downloads: 12 | Tags: None | Comments: 0

▼ Properties

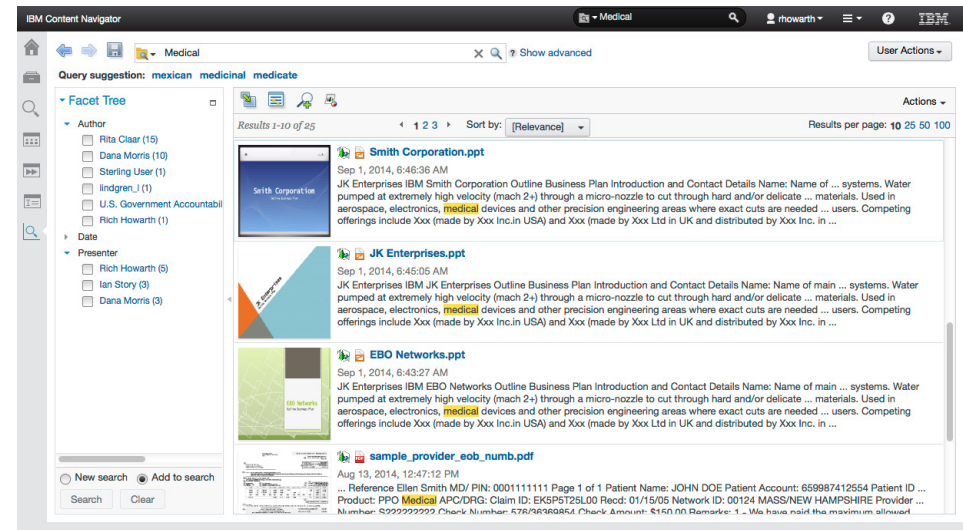
Class:	ID Document
Document Title:	Birth certificate: Richard_waters.jpg
First Name:	Joseph
DOB:	12/22/1920
Last Name:	Waters
Type of Document:	Birth Certificate

► System Properties

9/12/2014, 8:18 PM - 1 comment was retrieved.

ECM portfolio adoption of Content Navigator

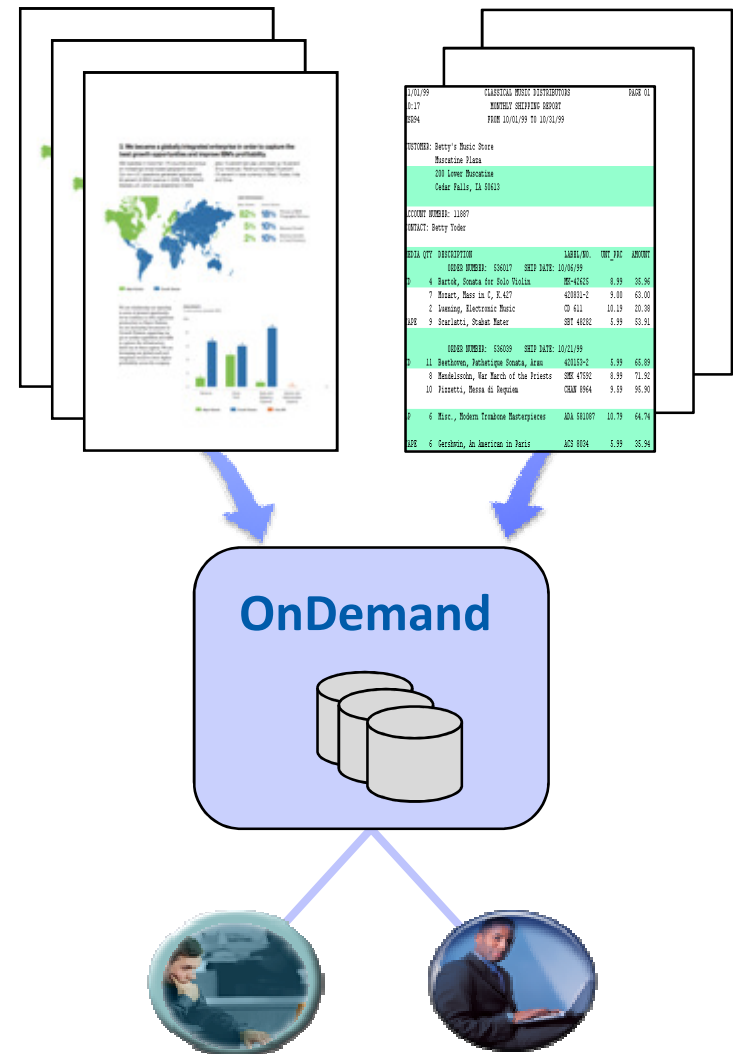
- Single UI for FileNet, CM8 & CMOD (done)
- Microsoft Office Integration (done)
- FileNet admin console (done)
- iOS & Worklight apps (done)
- Case Manager (done)
- Case Foundation (done)
- Content Classification for end user (done)
- Enterprise Records (done)
- Watson Content Analytics (done)
- Client for Image Services (done)
- Datacap (next release)
- ICC for SAP (next release)
- ...



Content Manager OnDemand (CMOD)

Enabling Electronic Bill Presentment

- Archival of customer correspondence: statements, invoices, policies, confirms, ...
 - Immediate access to electronic statements by customer services reps
 - Customer access to electronic statements
- Up to 90% storage savings through advanced compression
- Highly scalable and very efficient
- Easy to install and configure, highly reliable, lower cost to operate than most other repositories
- Electronic distribution of documents and reports
- Powerful indexing and searching – makes finding documents easy and fast



CM OnDemand - a legacy of big numbers

Compression
30:1

Creates cost savings of 50%

- Get the most out of disk devices
- Petabytes of data under management
- No penalty during access

Optimize hardware and manage IT costs

Performance
3500

Items per second

Retrieval is instant

- Multiplatforms, zSeries, iSeries, Web interface
- ECM System Monitor for application health management
- Content Navigator

Customers expect immediate access – and get it

Scalability
185

Billion documents stored

Architecture is unique in the industry

- 8.7 Million retrievals/day
- Scales from department to enterprise deployments

Start small and grow your application

Content Manager OnDemand .next

- RDF/ODF Integration
- New APIs to store high-volumes of individual documents
- XML indexing and archival
- Support for multiple language folder names and descriptions
- ODWEK support for multiple locales
- Other operations improvements

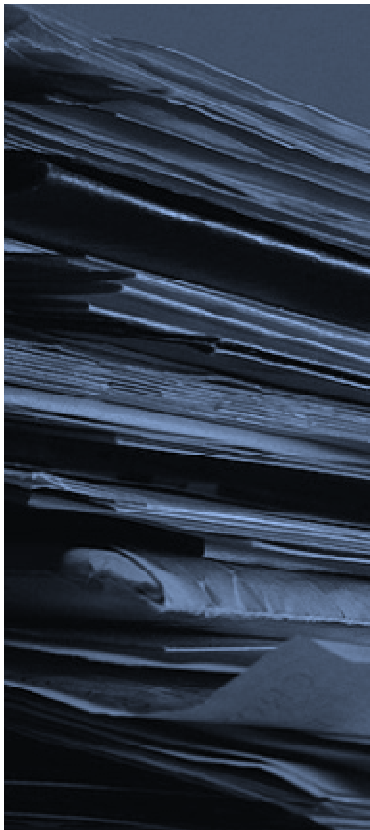
The screenshot displays the IBM Content Navigator interface. The top navigation bar includes 'Focus Reports' and a search bar. The main content area shows search results for 'Baxter Bay Statements' with a table of client information.

Client Name	Account #	Date	Balance	Doc Size	Load Date
SMITH CYCLERY	000-000-000	1995-03-03	1058.11	2716	2012-10-18 15:46:46
ADRIAN CYCLERY	000-000-001	1995-03-03	146.86	1676	2012-10-18 15:46:46
JACK'S CYCLERY	000-000-002	1995-03-03	2280.98	4853	2012-10-18 15:46:46
DENNIS BICYCLE SHOP	000-000-003	1995-03-03	142.23	1676	2012-10-18 15:46:46
TERRY'S SPORTS	000-000-004	1995-03-03	138.21	1806	2012-10-18 15:46:46
COBBLESTONE SCHWINN	000-000-005	1995-03-03	1690.11	3756	2012-10-18 15:46:46
SUMMIT SPORTS	000-000-006	1995-03-03	2828.11	5121	2012-10-18 15:46:46
ANN ARBOR CYCLERY	000-000-007	1995-03-03	341.62	1936	2012-10-18 15:46:46
			433.48	2066	2012-10-18 15:46:46
			1774.80	3756	2012-10-18 15:46:46
			1412.79	3626	2012-10-18 15:46:46
			427.06	2326	2012-10-18 15:46:46
			220.45	1806	2012-10-18 15:46:46
			982.06	2456	2012-10-18 15:46:46

The document preview shows a Baxter Bay Bank statement for SMITH CYCLERY. It includes account details, a payment table, and a transaction list.

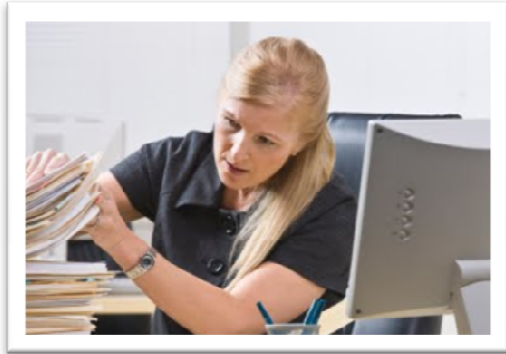
DATE	TRANSACTION DESCRIPTION	REFERENCE NUMBER	AMOUNT
02/04	PAYMENT - TITAN TOW	162418250 20397	-1893.87
02/04	UNITED AIRLINES	152704096 13200	7.24
02/04	GART BROTHERS	138208381 2985	127.54
09/04	CAFAYT	171417724 9 4684	10.47
02/04	WORLD TRAVEL	108340747 36702	185.37
02/04	FAHLEY	387694640 164307	194.25
02/04	SOUND WAREHOUSE	130208364 137159	111.51
02/04	DONALDO DL. CC.	485388550 938951	41.80
02/04	QUANQUAN PEA	108413802 160508	174.84
02/04	AMCCO	370623054 204504	14.72

Datacap is not only about scanning documents



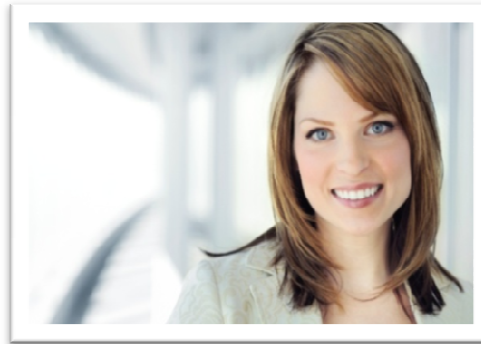
Data can come from many sources. Understanding and gaining insight into that data is what leads to successful business outcomes

Datacap is about



**Optimizing costs
and becoming
more agile**

by digitizing documents at the point of origination and accessing data trapped on paper



**Improving
business
performance**

by accelerating processes and giving more control of transactions to business users



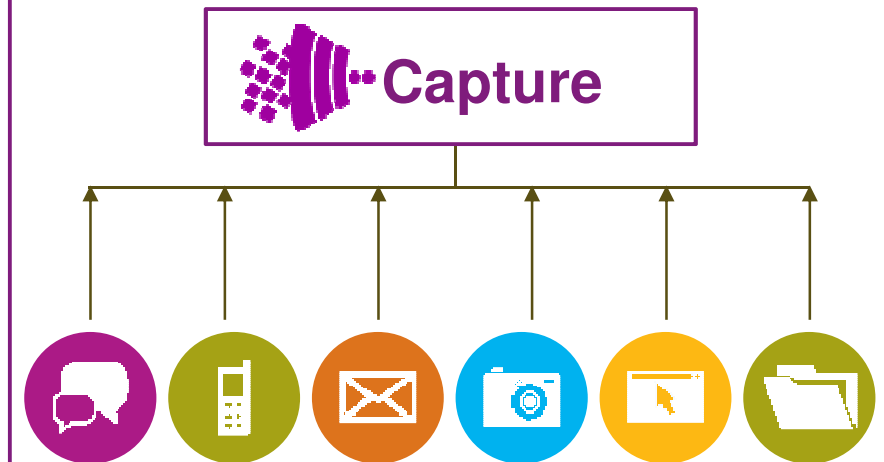
**Empowering
front line
employees**

by providing intuitive imaging solutions that shorten time to respond to a customer

Datacap – highlights

- **Mobile Capture**
 - Mobile capture of images straight into Datacap application
 - Auto edge detection/manual adjust, auto-de-warping with quality detection and image setting adjustments
 - iOS and Android Native apps, plus an SDK for customization
- **Distributed and Transactional Capture**
 - Support for hundreds of Multifunction peripherals (MFPs)
 - Real-time document delivery from branch offices to Datacap for processing
- **Capture and Imaging for Line of Business**
 - Tight integration of capture, business process and archiving to SAP for
 - Contracts, accounts payable, human resources, medical claims, etc.

IBM offers an enterprise-class capture and imaging platform as part of a comprehensive enterprise content management foundation



Fully exploit all sources of data and content for insight

Datacap .next – built with Content Navigator

▪ User experience

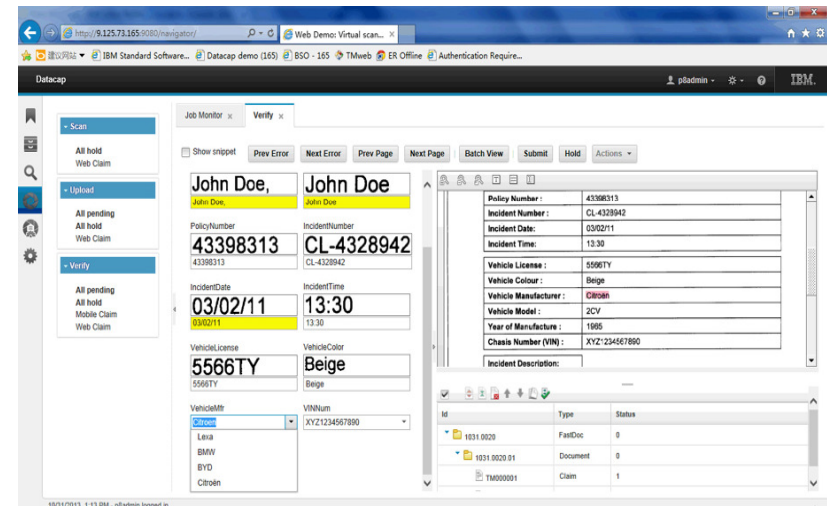
- Navigator-based user experience
- Integration with Navigator capabilities like External Data Services

▪ Mobile

- iPad support
- OCR on the device
- More image processing on the device

▪ Productivity enhancements

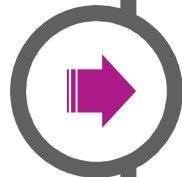
- Simplified tools for configuration and deployment
- Expanded FastDoc classification options
- Integration with repository metadata



Case Management can benefit every organization

How would you categorize your most prevalent or important case application(s)?

But you might not call it **case management**



SOURCE: AIIM, *Broadening the Scope for Advanced Case Management*, Doug Miles, 2013, <http://public.dhe.ibm.com/software/data/sw-library/ecm-programs/IBM-AdvancedCaseManagement-2013-Final.pdf>. © AIIM 2013 www.aiim.org/© IBM 2013 www.ibm.com

IBM Smarter Process

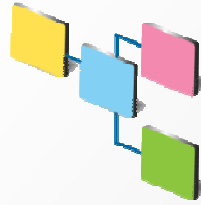
Decision-centric



Automate repeatable, routine decisions at scale with the fidelity of an expert

Operational Decision Management

Process-centric



Manage how work gets done across the spectrum from structured to ad hoc tasks

Business Process Management

Content-centric



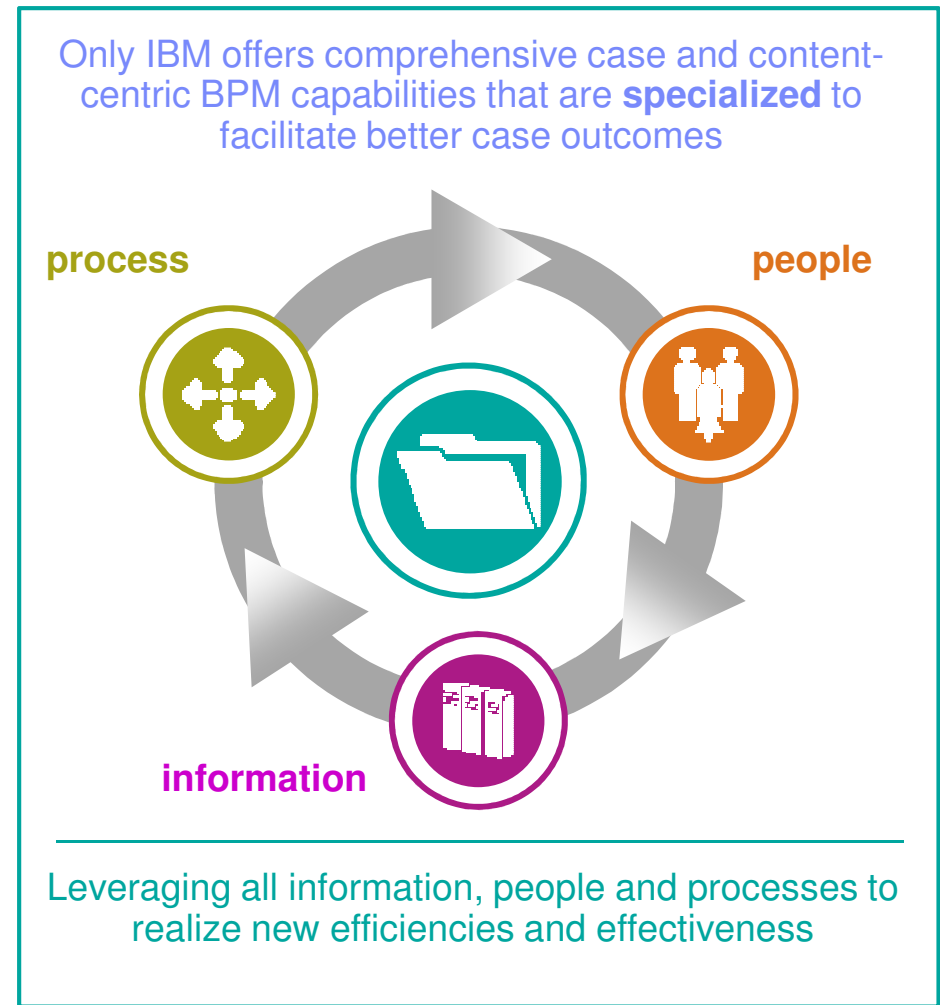
Driving better outcomes by putting business content to work

Case Management

IBM Case Manager

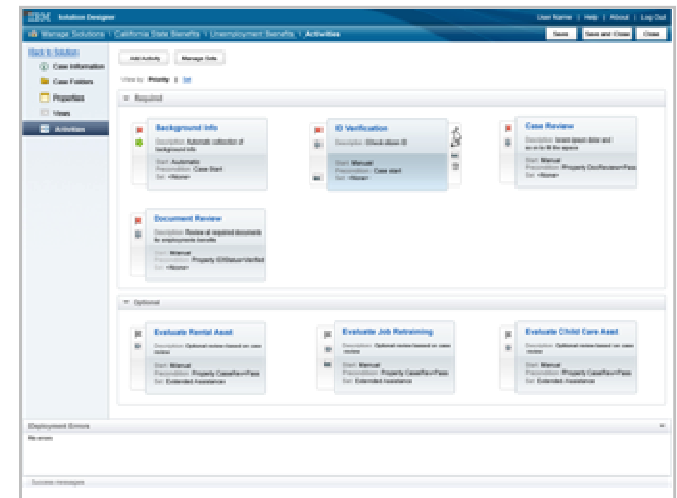
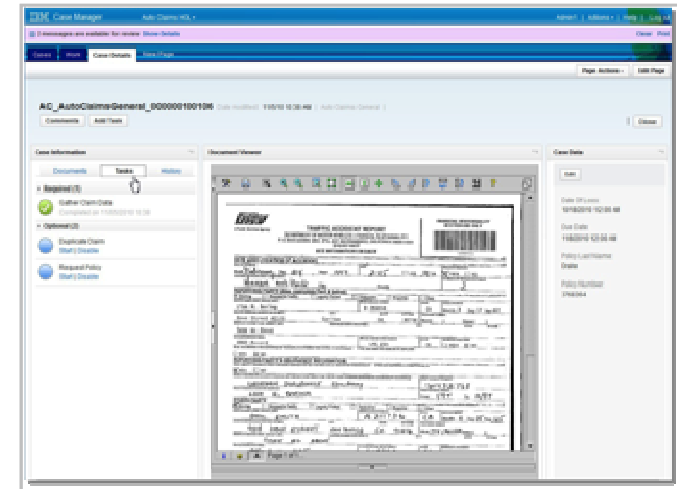
Achieve a 360-degree case view with information (content & data), dynamic tasks, collaboration, business rules and analytics

- Customers realizing substantial improvements in the effectiveness and efficiency of knowledge work
- Customers significantly shortening time-to-value with business-driven tools for building case solutions
- IBM Business Partners, GBS and IBM Software now offer array of industry-specific solutions



IBM Case Manager – Built on Content Navigator

- **Case Manager Builder** - Case Solution builder tool oriented to needs of line of business analysts
- **Case Manager Client** - A run time environment for launching, processing, and interacting with cases
- **Case Manager Analytics** - Real time cases monitoring with threshold monitoring and alert generation
- **Case Manager Administration Client** - Tool for configuring the Case Manage environment and for moving solutions between development and production domains
- **Case Manager API** - Communication layer between components of the Case Manager applications.



Case Manager 5.2.1 – Just Released !

- Support for external documents inside of a case
 - CM8 and CM OnDemand
 - Any CMIS-compliant repository
- In-basket enhancements
- Task-level properties
- Support for to-do tasks
- Support for externally-managed data along side case properties
- New configuration styles for page and layout styles
- New APIs that allow you to create your own data editors displayed on the case properties widget



Watson Content Analytics 3.5 – built on Content Navigator

The screenshot displays the IBM Content Navigator interface. At the top, there is a search bar with the text 'Specify search terms' and a search icon. To the right of the search bar, it shows '852/852 results matched' and a 'Show advanced' link. Below the search bar, there are several tabs: 'Documents', 'Facets' (which is selected), 'Time Series', 'Deviations', 'Trends', 'Facet Pairs', 'Connections', and 'Dashboard'. The main content area shows a table of search results for the 'Facets' view. The table has three columns: 'Values', 'Frequency', and 'Correlation'. Each row represents a facet value, with a checkbox on the left, the value name, a horizontal bar chart for frequency, the frequency count, and a green bar for correlation. The values listed include 'container leak', 'ice cream', 'of ... piece', 'vanilla ice cream', 'orange ... juice', 'chocolate ... ice', 'apple juice', 'confectionary ... company', 'juice pack', 'mint jelly', 'fruit jelly', 'of ... property', 'juice ... leak', 'of ... juice pack', 'pine juice', 'of ... container', and 'some ... juice'. The frequency counts range from 130 down to 43, and all correlation values are 1.0. On the left side of the interface, there is a 'Facet Navigation' panel with a search box and a tree view showing categories like 'Part of Speech', 'Phrase Constituent', 'Named entity', 'My Keywords', 'Category', 'Subcategory', and 'Product'. At the bottom of the interface, a status bar indicates '9/13/2014, 8:20 AM - The Root folder returned 8 items.'

Values	Frequency	Correlation
<input type="checkbox"/> container leak	130	1.0
<input type="checkbox"/> ice cream	121	1.0
<input type="checkbox"/> of ... piece	107	1.0
<input type="checkbox"/> vanilla ice cream	102	1.0
<input type="checkbox"/> orange ... juice	96	1.0
<input type="checkbox"/> chocolate ... ice	86	1.0
<input type="checkbox"/> apple juice	67	1.0
<input type="checkbox"/> confectionary ... company	62	1.0
<input type="checkbox"/> juice pack	62	1.0
<input type="checkbox"/> mint jelly	59	1.0
<input type="checkbox"/> fruit jelly	57	1.0
<input type="checkbox"/> of ... property	57	1.0
<input type="checkbox"/> juice ... leak	54	1.0
<input type="checkbox"/> of ... juice pack	53	1.0
<input type="checkbox"/> pine juice	47	1.0
<input type="checkbox"/> of ... container	43	1.0
<input type="checkbox"/> some ... juice	43	1.0

StoredIQ – understanding and acting on your data

- Analyze unstructured content across 75+ data sources
- Lower costs by identifying and disposing of unneeded data from file shares, SharePoint sites and other sources
- Reduce risk by finding sensitive personal or business data that is not stored securely
- Perform eDiscovery across a wide range of data sources and collect content needed for litigation
- Installs as a software appliance
- Doesn't require other IBM ECM products – can provide benefits to any environment

Collection from 75+ data Sources through one interface



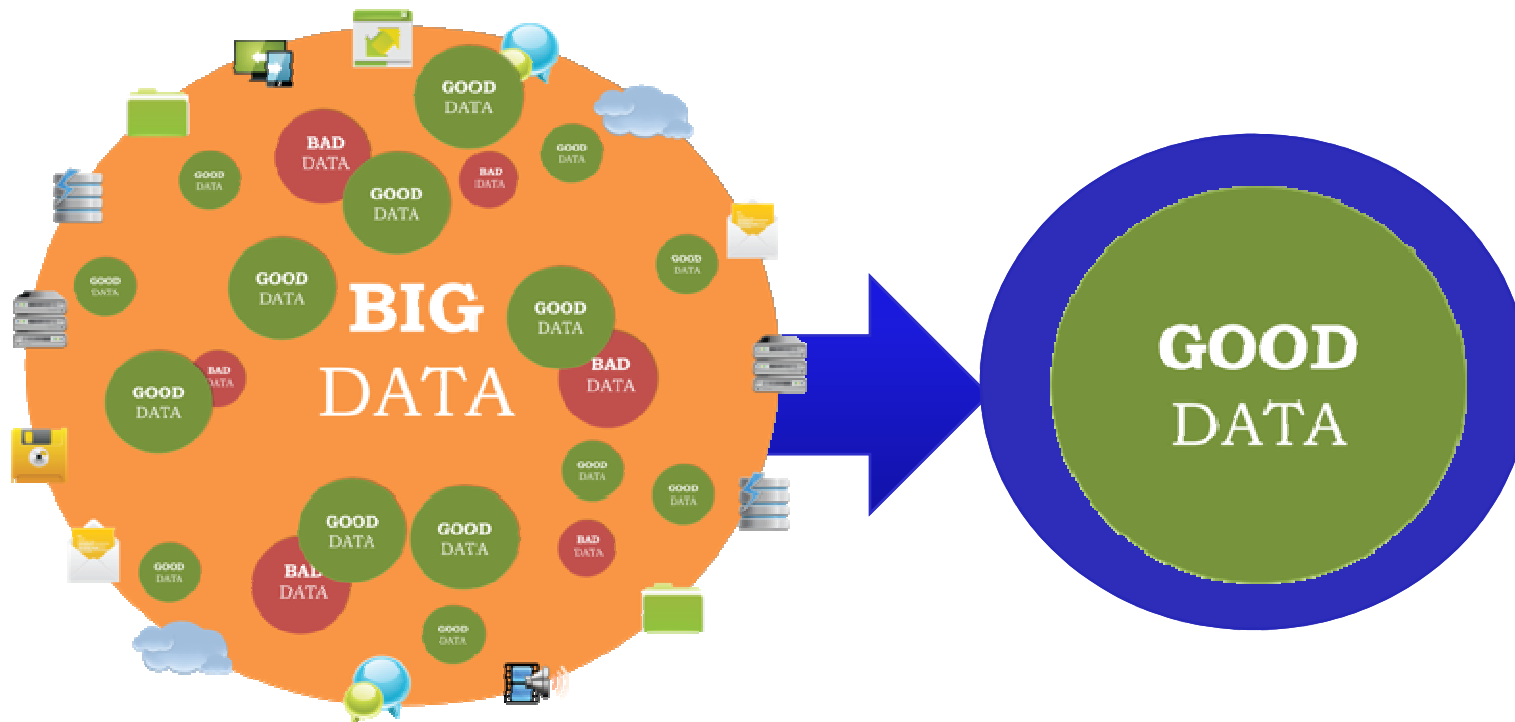
StoredIQ – turning big data into good data

Distinguish the “Good Data” from the “Bad Data”

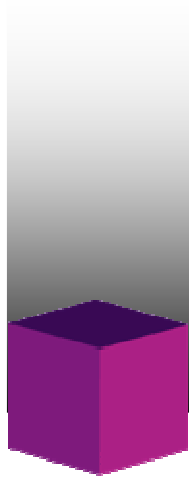
Move the “Good Data” where it belongs

Delete the “Bad Data”

Turn “Good Data” Into “Better Data”



Thank You !



Content 2014
Realize the value of
content to transform your
business



Rich Howarth
Vice President, ECM Products & Strategy
howarth@us.ibm.com