

Content Manager OnDemand

Greg Rochocki

Bruce Foster

FIRST BANK OF WIKI
 1000 JAMES ST. PO BOX 4000
 VICTORIA BC V8B 1S8 1-800-888-8888

CHECKING ACCOUNT STATEMENT
 Page: 1 of 1

Statement period: 2013-10-01 to 2013-11-30
 Account No: 123-456-7

Date	Description	Debit	Credit	Balance
2013-10-01	Previous Balance			215.10
2013-10-05	Patrol Deposit - ICBC		500.00	715.10
2013-10-10	Auto Bill Payment - ICBC	100.00		615.10
2013-10-15	ATM Withdrawal - INTERAC	200.00		415.10
2013-10-20	Auto Bill Payment - ICBC		100.00	515.10
2013-10-25	ATM Withdrawal - ELECTRONIC	100.00		415.10
2013-10-28	Interest Payment - FIRST BANK		100.00	515.10
2013-10-30	Interest Payment - INTERAC	100.00		415.10
2013-10-31	Telephone Bill Payment - VISA	100.00		315.10
2013-11-01	Patrol Deposit - ICBC		500.00	815.10
2013-11-05	Auto Bill Transfer - From SAUVAGE	100.00		715.10
2013-11-10	Patrol Deposit - INTERAC		100.00	815.10
2013-11-15	Check for: 400	100.00		715.10
2013-11-20	Mortgage Payment	100.00		615.10
2013-11-25	Auto Bill Payment	100.00		515.10
2013-11-30	Auto Bill Payment	100.00		415.10
Totals:				1,442.00



SCORE	Orig/Frt/Col	SL/STW
PHX	Ground	21
DESCRIPTION		
BLE, 4TL, RED DX121		UNIT PRIC
LE, 2tl, WHITE DX345		220.00
NG, TENSION, RX343		120.00
CASED, VERT		50.00
., CASED, VERT		329.00
CASED, VERT		49.50
		80.00

Check Instructions 1248

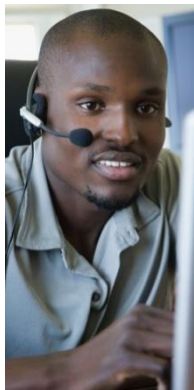
1248 North Main Street
 Austin, Texas 78701
 (512) 323-4567
 (Please provide the correct phone number to raise any questions)

PAY TO THE ORDER OF: **TEXAS COMPTROLLER OF PUBLIC ACCOUNTS** \$ **215.10**
 TWO HUNDRED FIFTEEN DOLLARS AND 10/100 (Dollars in words amount)

Texas Taxpayer Number (11 digits) or Federal Employer Identification Number (9 digits)
 Print Tax Type and Billing Method

SAMPLE CHECK
 SIGNATURE (To sign to sign)

PAYMENTS	
MORTGAGE	359,420.43
AUTO	25,459.95
FIRST BANK	209.45



Order For: Diagnostic Order

Lab: (7) Inhouse Lab

Specimen: Fatigue (No) Source:

Note:

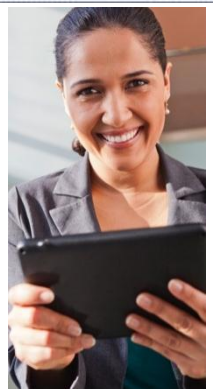
Hit Tab - Space to go

Diagnosis: DEXA SCAN

EMG/NCIS

MRCP & MRI - ABDOMEN W/WD

MRCP & MRI - ABDOMEN W/WD



Credit Card Statement

Account Number: 1234 5678901 Name: Stacy Student Statement Date: 1/15/2015 Payment Due Date: 2/14/2015

Reference	Sold	Posted	Activity Since Last Statement	Amount
80XN773		12/12	Payment Thank You	-10.00
78XY667	12/20	12/22	Gas To Go	35.24
34XP889	12/25	12/26	Car Air	63.62
23XV001	12/26	12/28	Computer Monitor	697.78
76XW011	1/8	1/10	Pizza Palace	-24.53

Previous Balance	Payments	Credits	Finance Charges	Late Charges	NEW BALANCE
(+) 1294.43	(+) 820.57	(+) 10.00	(+) 10.00	(+) 1000.00	1000.00

Current Amount Due	Amount Past Due	Amount Over Credit Line	Minimum Payment Due
1000.00	820.57	30.00	30.00

FINANCE CHARGE SUMMARY: Periodic Rate: 3% Annual Percentage Rate: 36%

ADVANCES: Periodic Rate: 3% Annual Percentage Rate: 36%

For Customer Service Call: 1-800-555-5555 For Loan or Student Cards, Call: 1-888-555-5555

Services


1 Local Package, which includes: <ul style="list-style-type: none"> Unlimited Local Calling Unlimited Local Directory Assistance Caller ID Call Waiting Busy Redial *66 	\$27.95
2 Unlisted Number	1.48
Total Services	\$29.43

Tax & Fees

3 Federal Subscriber Line Charge	\$6.00
4 Federal Universal Service Fee	.58
5 Local Number Portability Charge	.23
6 911 State/County Charges	.42
7 New Hampshire State & Local Tax	1.70
8 Federal Excise Tax	1.08
Total Tax & Fees	\$10.01



OnDemand is Everywhere, and You Already Use It !



John views his latest brokerage statement on his iPhone

Alicia views her check images from her bank

Bob views his monthly phone bill on his iPad

An Outpatient views her EOB on her Galaxy S5

Rachael views her credit card statement online

Ryan views his bank statement on his laptop

IBM is the clear market leader

“ A growing opportunity for IBM lies in building smarter ECM infrastructures. These industry initiatives span enterprises and ecosystems. ”



Source: Gartner, Magic Quadrant for Enterprise Content Management, September 2014

Customer service challenges and business pressures

Inability to access transactional content where needed

Difficulty making information available via portal or the Internet

Escalating transaction volumes and storage costs

Compliance requirements that are becoming critical in every country



OnDemand for Digital Front Office

Customer Self Service

Change the way people connect, transact and engage with their own customer data by presenting their data on line



Meet your customers expectations

Leverage digital, mobile and social insights to spot growth opportunities and new paths to value

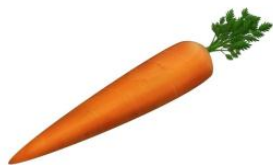
Gain customer insights

By using tools and techniques to mine your data....CMOD is Big Data

Build systems of engagement

Orchestrate continuous customer interactions to optimize engagements and build advocacy

Tips for Adoption of Electronic Delivery



Carrots

- Electronic bill presentment as amenity
- Offer discounts for electronic delivery
- Use incentives or promotions for buy-in
- Sell the environmental benefits
- Leverage social media to sell the message
- Start sending electronic statements proactively
- Give customer choices as to which documents to receive electronically, and which to continue receiving hardcopy



Sticks

- Make electronic delivery of statements the default for all new accounts
- Charge for paper statements
- Leverage re-negotiation periods to build this cost savings into your contracts for corporate statements

Marketing

- Electronic delivery drives customers to a company's website
- Use messaging that your clients will readily accept
- Create a sense of value & urgency

Statement presentment and service confirmation marketplace

50%



Half of customers want to transact by smart device.

People under the age of 30 want to communicate via tablet or smartphone.

\$3–\$6



This is the cost to send a single statement, invoice, benefits summary, letter, etc.

\$15M



This is the amount a company with 10 million customers spends per mailing cycle.

And customers may prefer not to receive direct mail.

What type of content do you use in your industry?



PDF and
XML Docs

AFP and Xerox Docs

Faxes

Images

Photos

Line Data
Reports

Content Manager 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
- FileNet System Monitor for application health management
- Content Navigator

Customers expect immediate access – and get it

Scalability

162

Billion documents stored

Architecture is unique in the industry

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

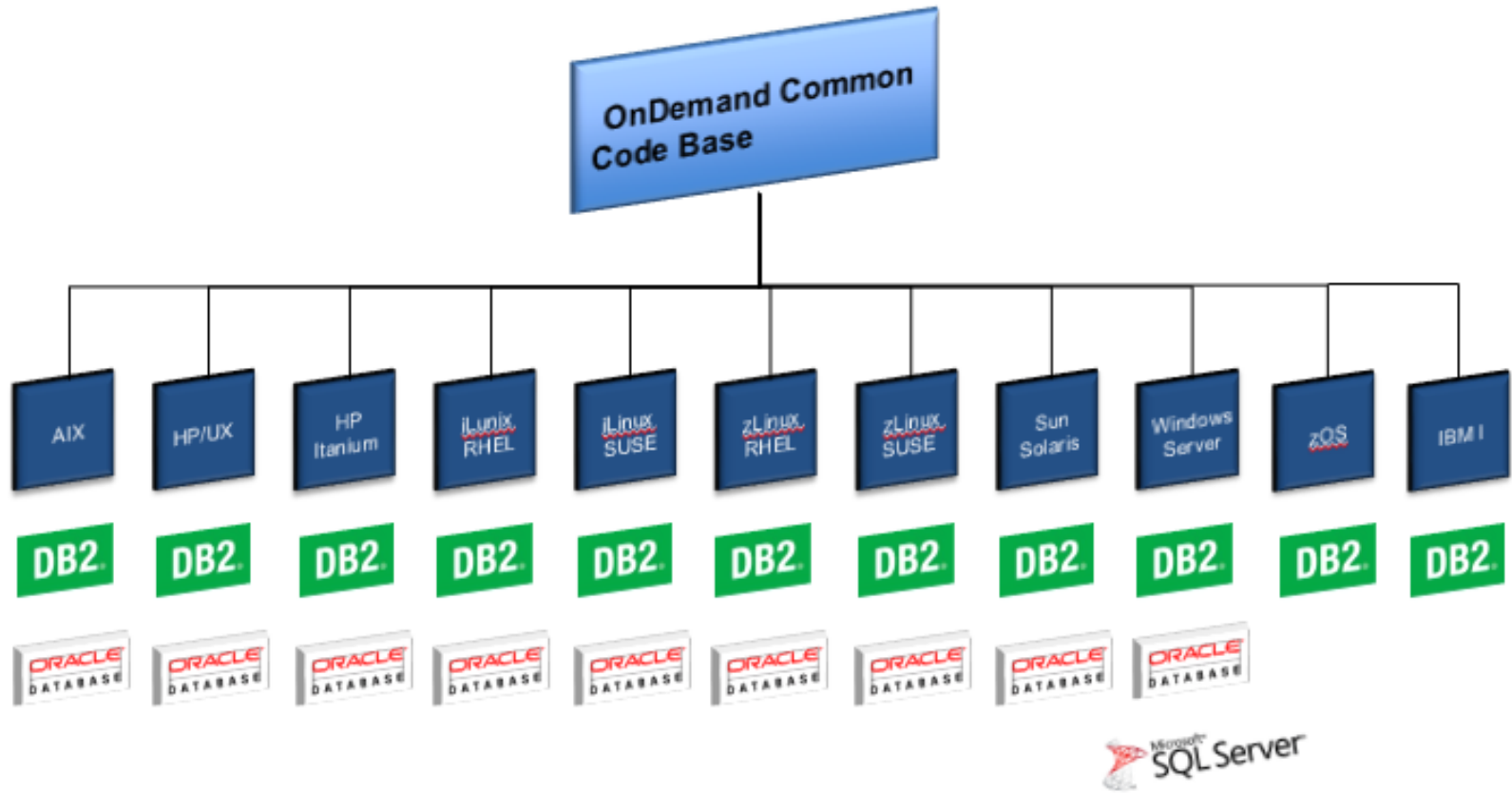
Start small and grow your application

See <http://www.viewpointe.com/uploadedfiles/viewpointe/pdfs/viewpointe-check-archive-fact-sheet.pdf>

OnDemand has an Active Development Cycle

Capabilities / Features	V8.4 N-4	V8.4.1 N-3	V8.5 N-2	V9.0 N-1	V9.5 N
XML Indexing					✓
Document Store API					✓
OnDemand Distribution Facility & GUI					✓
Line2PDF Transform					✓
Russian & Turkish language support					✓
Multi-language Folders & Descriptions					✓
Multi version installs - for upgrades					✓
Non-root Unix installation					✓
Full Text Search				✓	✓
Advanced Monitoring				✓	✓
CM Interoperability Support				✓	✓
OS 390 Indexer				✓	✓
128 Metadata fields				✓	✓
Excel integration				✓	✓
IBM Content Navigator(ICN)			✓	✓	✓
Report Distribution Facility			✓	✓	☒
SSL and FIPS -140 support			✓	✓	✓
Improved AFP, Line and PDF data indexing			✓	✓	✓
Expanded multi-conc languages			✓	✓	✓
Subsystem failover support			✓	✓	✓
DECFLOAT support (DB2)			✓	✓	✓
System mngt enhancements			✓	✓	✓
Enhanced Retention		✓	✓	✓	✓
FileNet P8 integration		✓	✓	✓	✓
64 bit JNI support		✓	✓	✓	✓
Indexer enhancements		✓	✓	✓	✓
ODWEK enhancements		✓	✓	✓	✓
Citrix on Windows client		✓	✓	✓	✓
LDAP login authentication	✓	✓	✓	✓	✓
Cabinet Support for Folders	✓	✓	✓	✓	✓
Multi-char predictive search	✓	✓	✓	✓	✓
Export to file	✓	✓	✓	✓	✓
Filename indexing	✓	✓	✓	✓	✓
Global annotations	✓	✓	✓	✓	✓
Server based hit-list sorting	✓	✓	✓	✓	✓
WEBi support	✓	✓	✓	✓	✓

Platform and Database Support



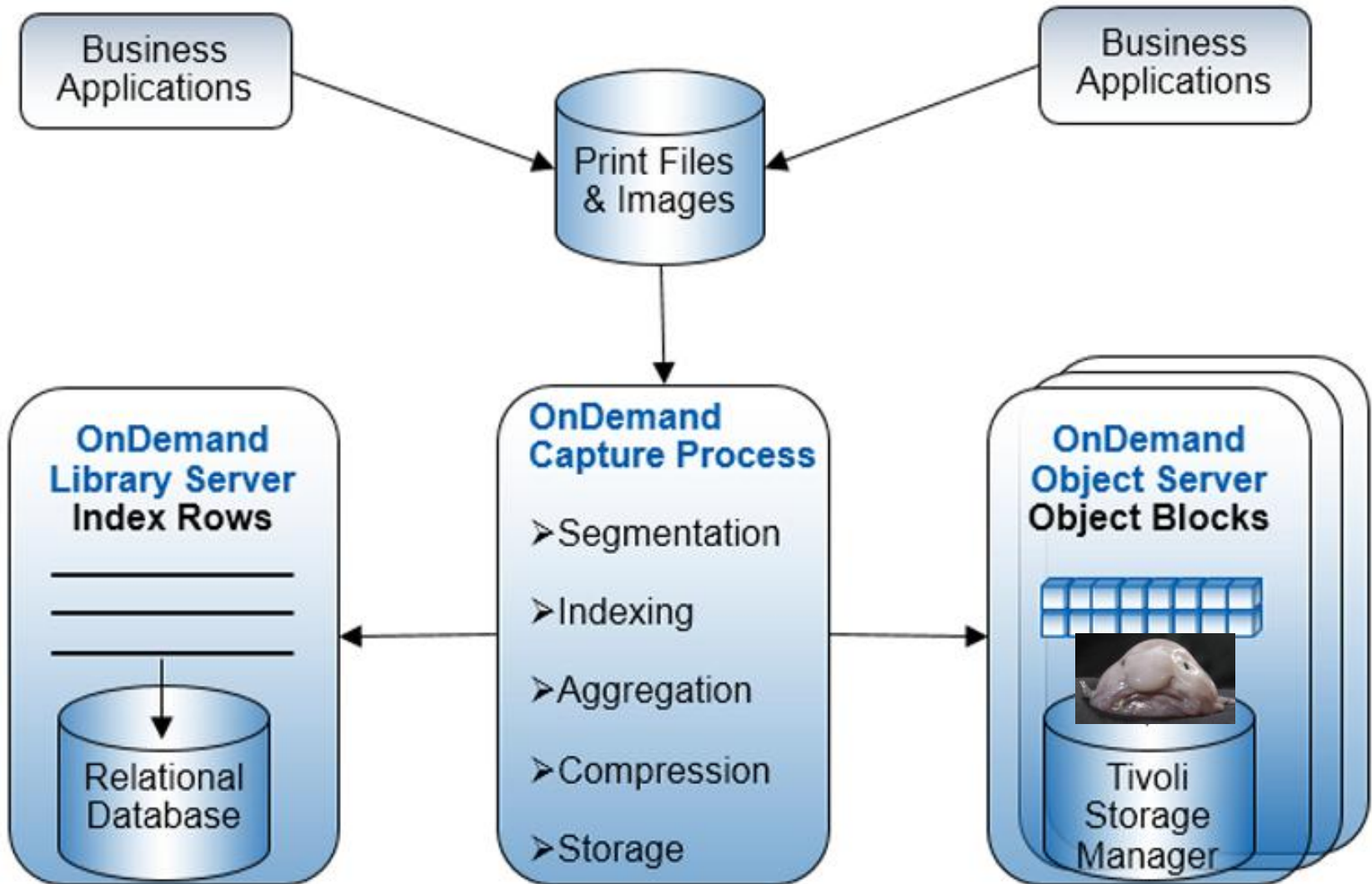
Content Manager OnDemand on Cloud

Flexible Licensing and Deployment

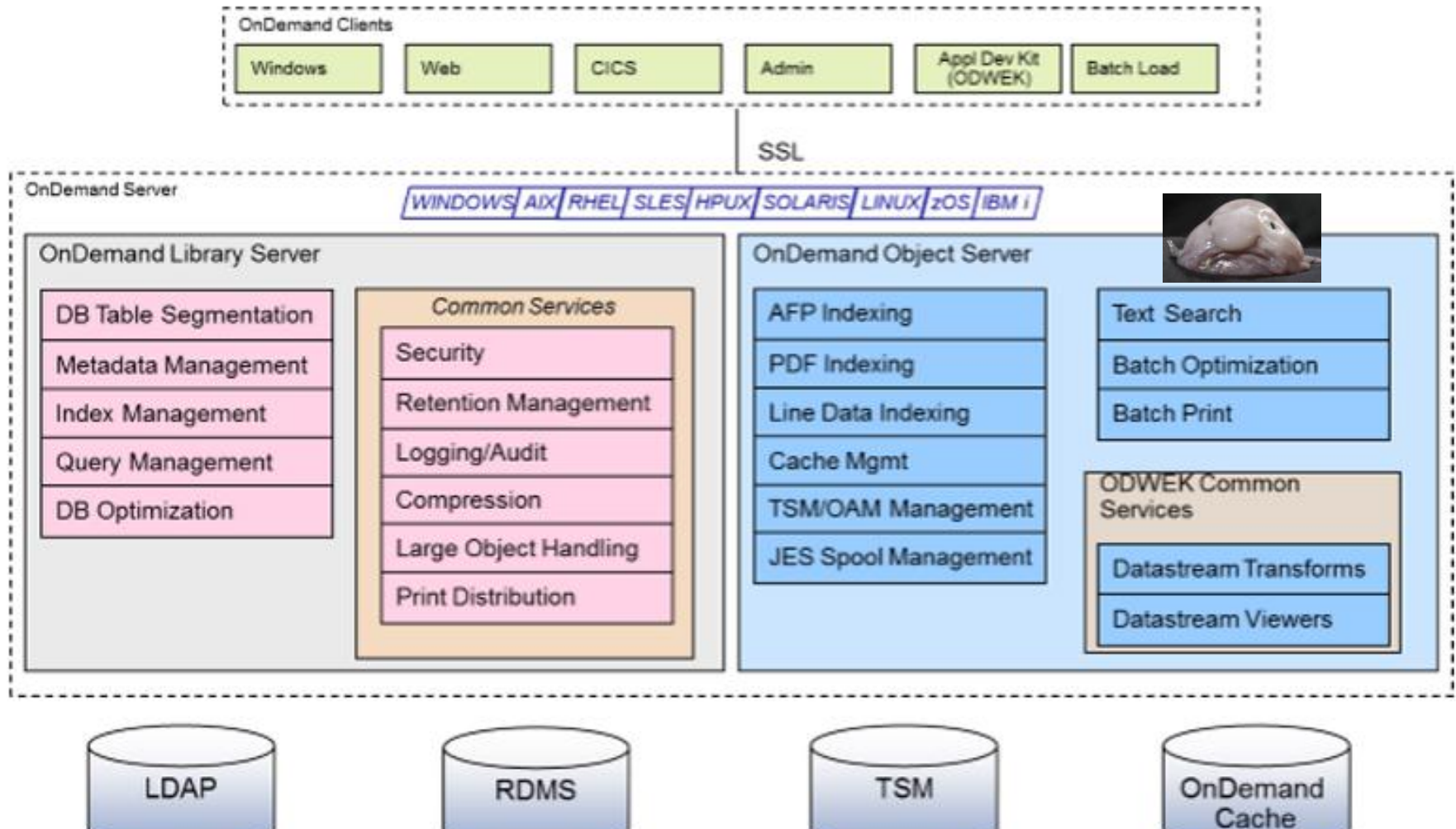


- **Key Capabilities**
 - Provides OnDemand as a Secure Hosted Managed Services offering
 - Provisioned on SoftLayer by IBM Services
- **Included**
 - Setup of reports/application-output definitions
 - Report Loading and Indexing
 - Report distribution to Authorized Users
 - Periodic content expiration
 - Web-Based User Access
 - Full System Management
- **Optional**
 - Systems integrations
 - System migrations
 - Additional reports/application-output definitions
- **Target Markets**
 - Existing customers – upgrades, expansions
 - New customers - migrations

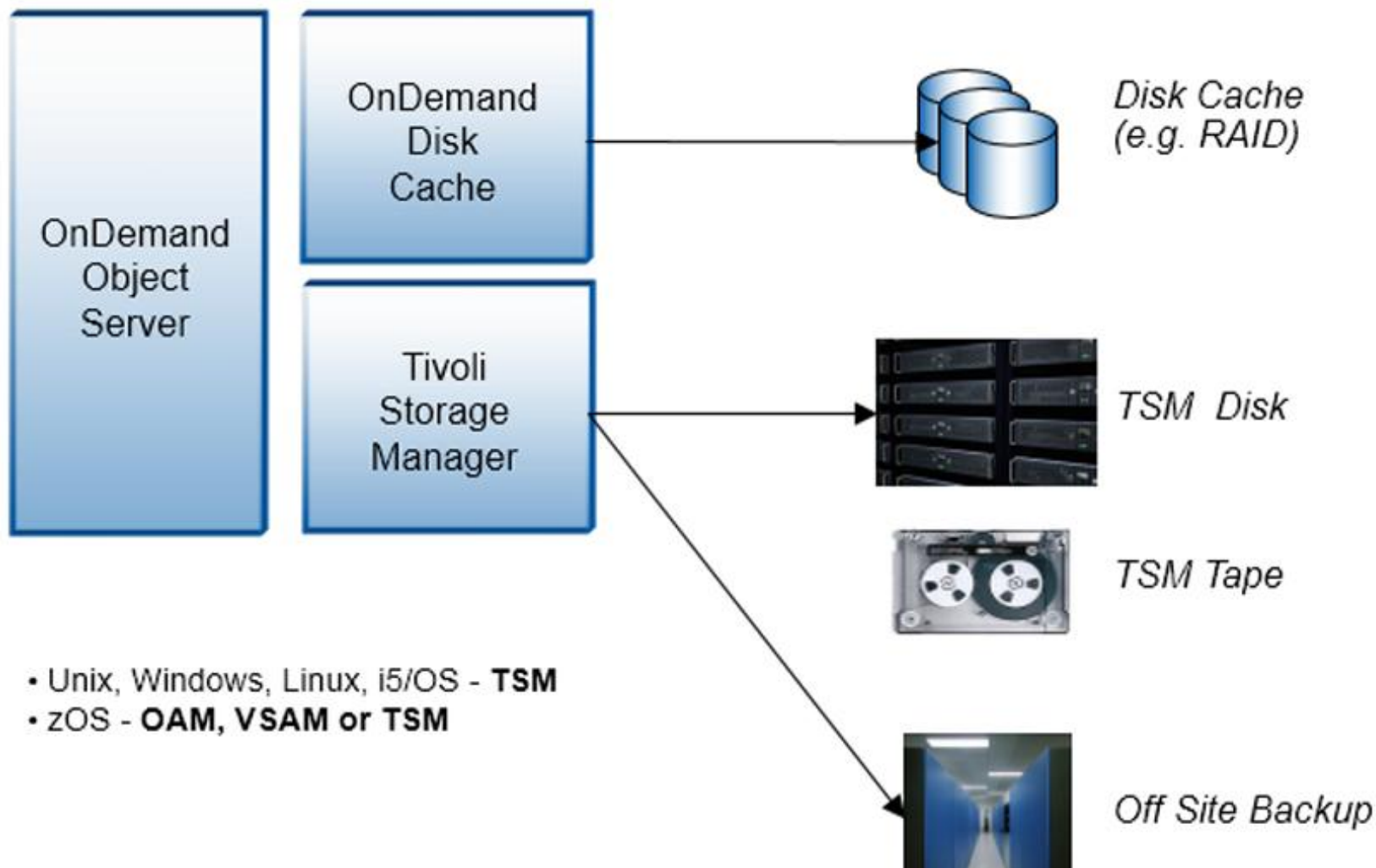
OnDemand Architecture



Architecture Components



OnDemand Storage Management

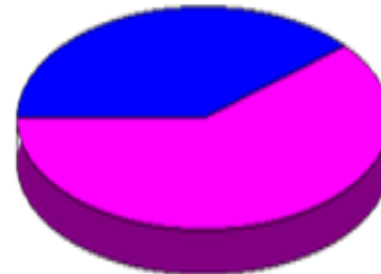


So, why not just use P8 or CM8?



■ Used space:	430,631,649,280 bytes	401 GB
■ Free space:	529,563,021,312 bytes	493 GB

Capacity: 960,194,670,592 bytes 894 GB



Drive C:

Disk Cleanup

Why use CM OnDemand with an ECM Repository?

CM OnDemand is designed for:

- ✓ Fully Automated High Volume Ingestion and Bursting of Batches
- ✓ Storing **very large volumes** of **static 'like' content**, typically XML, batch PDF, Check Imaging and transactional Print Output such as reports, statements and invoices
- ✓ Long-term archival with low rates of retrieval
- ✓ Very large numbers of internal and external users
- ✓ Virtually unlimited scalability
- ✓ Unmatched levels of compression
- ✓ Fast install and deploy

P8 and CM8 cannot parse a print stream

General Purpose ECM is designed for:

- ✓ **Active** and updateable documents, or creation of new documents
- ✓ Repository for cases or workflow documents
- ✓ Team collaboration
- ✓ Workflow solutions, review and approval, active content

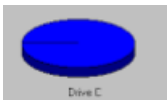
With IBM Content Navigator, repositories are invisible

Time and Space



5000 single PDF documents took 25 minutes to load (one at a time)
 5000 documents in one PDF took 4 minutes to load (one stream)
 (with PPD it took 2 minutes to load)

PDF One File vs. Many Case II



VS.



46MB before CMOD – 33MB in CMOD

OnDemand Compression

8:1 to 30:1

Typical Compression Ratios



The Content Manager OnDemand PDF indexer now supports **resource grouping** and removing **unused resources**. After you enable resource grouping, common resources across statements in a single report are grouped and stored as a **single instance**, and unused resources from a report can be **removed before indexing**. These features can save a tremendous amount of **disk space and reduce cost**.

IBM Content Navigator

Access content across your enterprise in a secure manner – anytime, anywhere



Clarity

Cross Repository Search,
Retrieve and Display

Smartphone & Tablet accessible



Extensible open standards framework

CMIS Support

Plug-in functionality



Benefits

Single Pane of Glass for all ECM
Products

Content Navigator Search

Content Manager OnDemand

admin

System Load | **Baxter Bay Statements** | Customer Information | Loan Delinquency Reports

Search Criteria: Property options: Match all

Client Name: ? Like %

Account #: ? Like

Date: ? Between 1993-01-01 and 1998-12-30

Balance: ?

Search Reset Saved Search to Search Keep search criteria open

Search Results

Refresh | Add New Document

Showing results for: Baxter Bay S

Client Name	Date	Balance	Doc Size	Load Date
SMITH CYCLERY CO	1995-03-03	1058.11	2716	2014-10-21 16:29:11
ADRIAN CYCLERY	1995-03-03	146.86	1676	2014-10-21 16:29:11

4/27/2015, 4:28 PM - The configuration was added.

Content Navigator Viewing

IBM Content Navigator Viewer - Mozilla Firefox

cmodeserver.ecm.ibm.local:9080/navigator/viewer.jsp?desktop=OnDemand

Content Manager OnDemand - Viewer

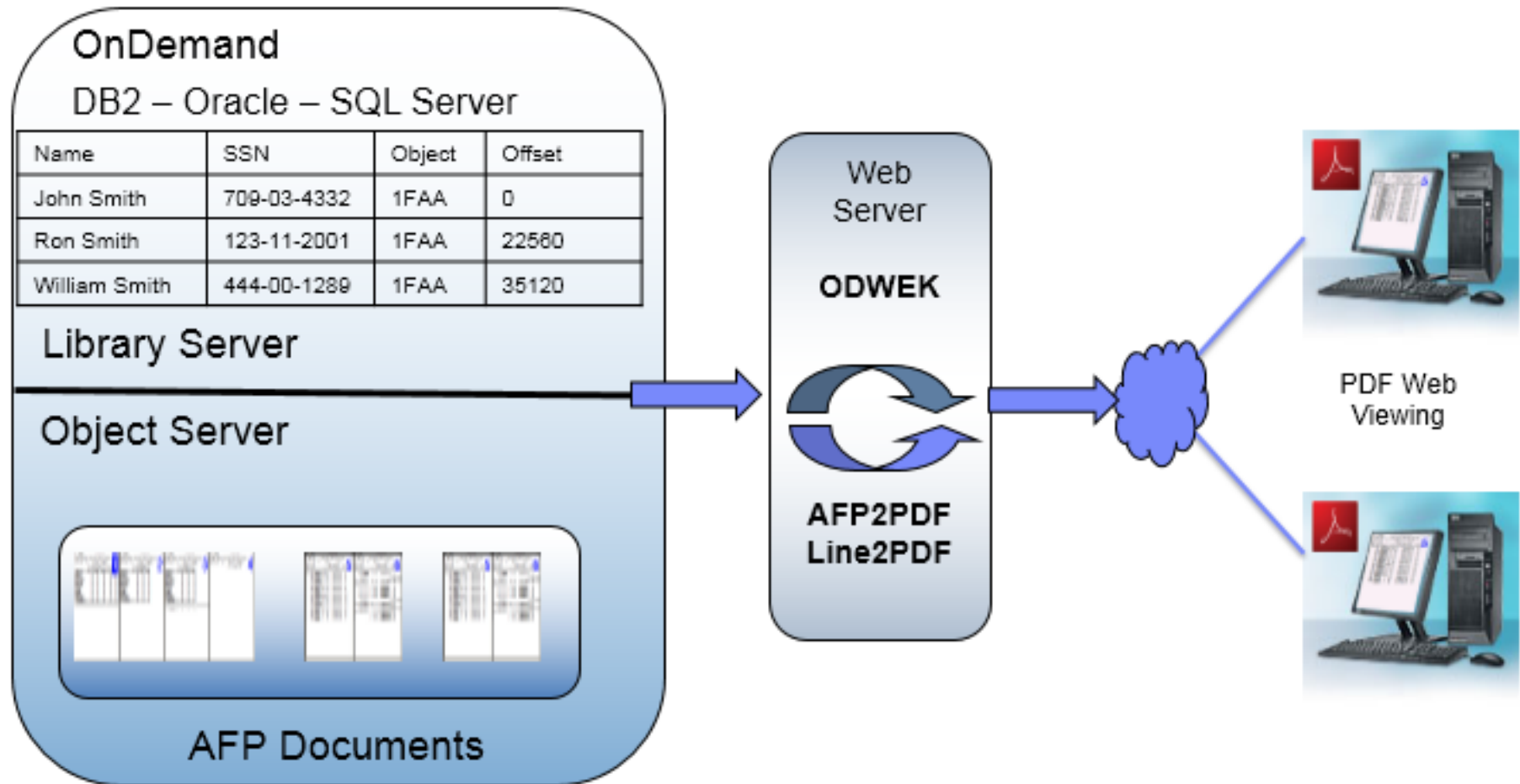
SMITH CYCLERY CO x A & T PIANO) x A & T PIANO x

REPORT CUST12498 BAXTER BAY BANK DATE 11/30/05

SUMMARY OF CREDIT CARD CHARGES FOR CUSTOMER 000-000-152 (A & T PIANO)
FOR TIME PERIOD 01/01/2005 THROUGH 09/20/2005 SORTED BY DATE

DATE	TRANSACTION DESCRIPTION	REFERENCE NUMBER	PROC DATE	AMOUNT
01/20/05	GART BROTHERS WESTMINSTER CO	1966811384 10300	01/21	130.37
01/20/05	K-MART ARVADA CO	1977238081 62890	01/21	163.91
01/20/05	SOUND WAREHOUSE DENVER CO	1491211888 14384	01/21	34.25
01/20/05	TARGET PETOSKY MI	158249430 613034	01/21	31.00
01/20/05	UNITED AIRLINES DENVER CO	1451776003 12954	01/21	29.62
01/20/05	WORLD TRAVEL LOUISVILLE KY	344908098 779883	01/21	130.91
01/21/05	CONOCO OIL CO. NASHVILLE TN	430479315 702226	01/22	194.51
02/20/05	GART BROTHERS WESTMINSTER CO	139059230 230791	02/21	46.25
02/20/05	K-MART ARVADA CO	1779833470 16841	02/21	100.11
02/20/05	SOUND WAREHOUSE DENVER CO	716915860 113128	02/21	155.19
02/20/05	TARGET PETOSKY MI	710451548 129783	02/21	6.93
02/20/05	UNITED AIRLINES DENVER CO	865339095 182885	02/21	153.84
02/20/05	WORLD TRAVEL LOUISVILLE KY	163340652 212461	02/21	86.60
02/21/05	AMOCO DENVER CO	472788118 367325	02/22	123.90
02/21/05	BLACK-EYED PEA OAK RIDGE TN	579989456 180203	02/22	84.93
02/21/05	CONOCO OIL CO. NASHVILLE TN	1899178779 16502	02/22	82.58
03/20/05	GART BROTHERS WESTMINSTER CO	1884994601 20373	03/21	183.31
03/20/05	K-MART ARVADA CO	799077114 656152	03/21	174.00
03/20/05	SOUND WAREHOUSE DENVER CO	1133358971 75879	03/21	173.73
03/20/05	TARGET PETOSKY MI	1066245850 11157	03/21	153.53
03/20/05	UNITED AIRLINES DENVER CO	944254461 139056	03/21	103.54
03/20/05	WORLD TRAVEL LOUISVILLE KY	1736177787 17447	03/21	194.35
03/21/05	AMOCO DENVER CO	599193825 112029	03/22	169.02
03/21/05	BLACK-EYED PEA OAK RIDGE TN	804468581 117563	03/22	2.61

Publishing Documents on the Web (store in native format and convert)



OnDemand Distribution Facility

- Group reports and portions of reports together
- Easy way to organize reports
- Convert report data
- Send reports through e-mail
- Make reports available for printing



Protect and Comply

Full Text Search

Go beyond Meta Data. Search complete document text: Find Needles in a Haystack!



Holds (Enhanced Retention)

Comply with Legal requests to lock down and preserve documents: Reduce Risk!

Time based Retention

Retain the documents you need - for as long as needed: Good Housekeeping!



Datawatch Report Mining Delivers Insight Industrial Strength Analytics for OnDemand



DATAWATCH

Report mining server

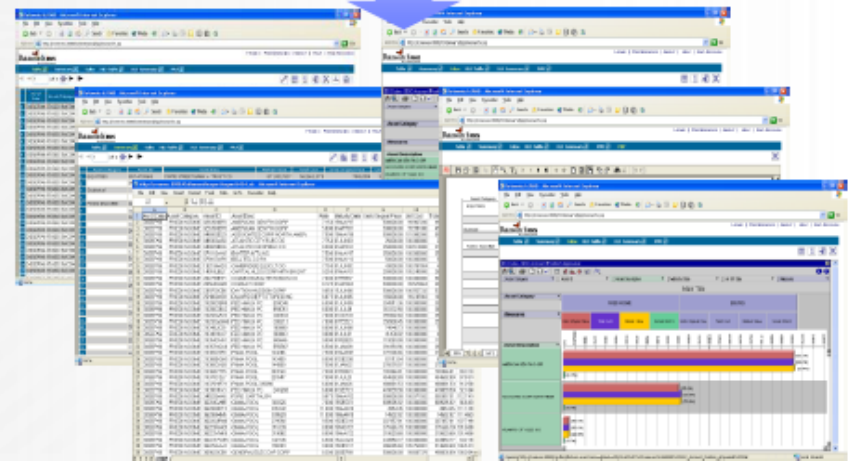
- Report Mining Server (RMS) is a web-based solution for OnDemand
- RMS transforms OnDemand content into end user data views:
 - Summarize and Analyze
 - Subtotal, Total
 - Average, Counts, Percentages
 - In browser filtering, sorting and graphing of report data
- One-click real-time access to report data in web and Excel spreadsheet format
- Enables deeper Client understanding for cross-sell / upsell opportunities
- Put content at rest - to work!

11/01/99 CLASSICAL MUSIC DISTRIBUTORS PAGE 01
10:17 MONTHLY SHIPPING EXPORT
MSE94 FROM 10/01/99 TO 10/31/99

CUSTOMER: Betty's Music Store
Miscatina Plaza
200 Lower Muscatine
Cedar Falls, IA 50613

ACCOUNT NUMBER: 11887
CONTACT: Betty Yoder

MEDIA	QTY	DESCRIPTION	ORDER NUMBER:	SHIP DATE:	LABEL/NO.	UNIT_PRC	AMOUNT
CD	4	Bartok, Sonata for Solo Violin	536017	10/06/99	MY-42625	8.99	35.96
	7	Mozart, Mass in C, K.427			420891-2	9.00	63.00
	2	Luening, Electronic Music			CD 611	10.19	20.38
TAPE	9	Scarlati, Stabat Mater			SBT 48282	5.99	53.91
		ORDER NUMBER: 536009		SHIP DATE: 10/21/99			
CD	11	Beethoven, Pathetique Sonata, Arca			420152-2	5.99	65.89
	8	Mendelssohn, War March of the Priests			SMK 47592	8.99	71.92
	10	Vincenti, Massa di Requiem			CHAN 0964	9.99	99.90
LP	6	Misc., Modern Trombone Masterpieces			ADA 581087	10.79	64.74
TAPE	6	Gershwin, An American in Paris			ACS 8034	5.99	35.94



Datawatch Industry Examples



Telco – Deliver the ability to sort, filter and analyze bills by dept., caller and location.



Credit cards – Analysis of statements on-line or in the contact center; significant cost savings, fraud detection, retention



Banking/Finance – Statements online or in the contact center; significant cost savings, compliance, trade desks, branch analysis

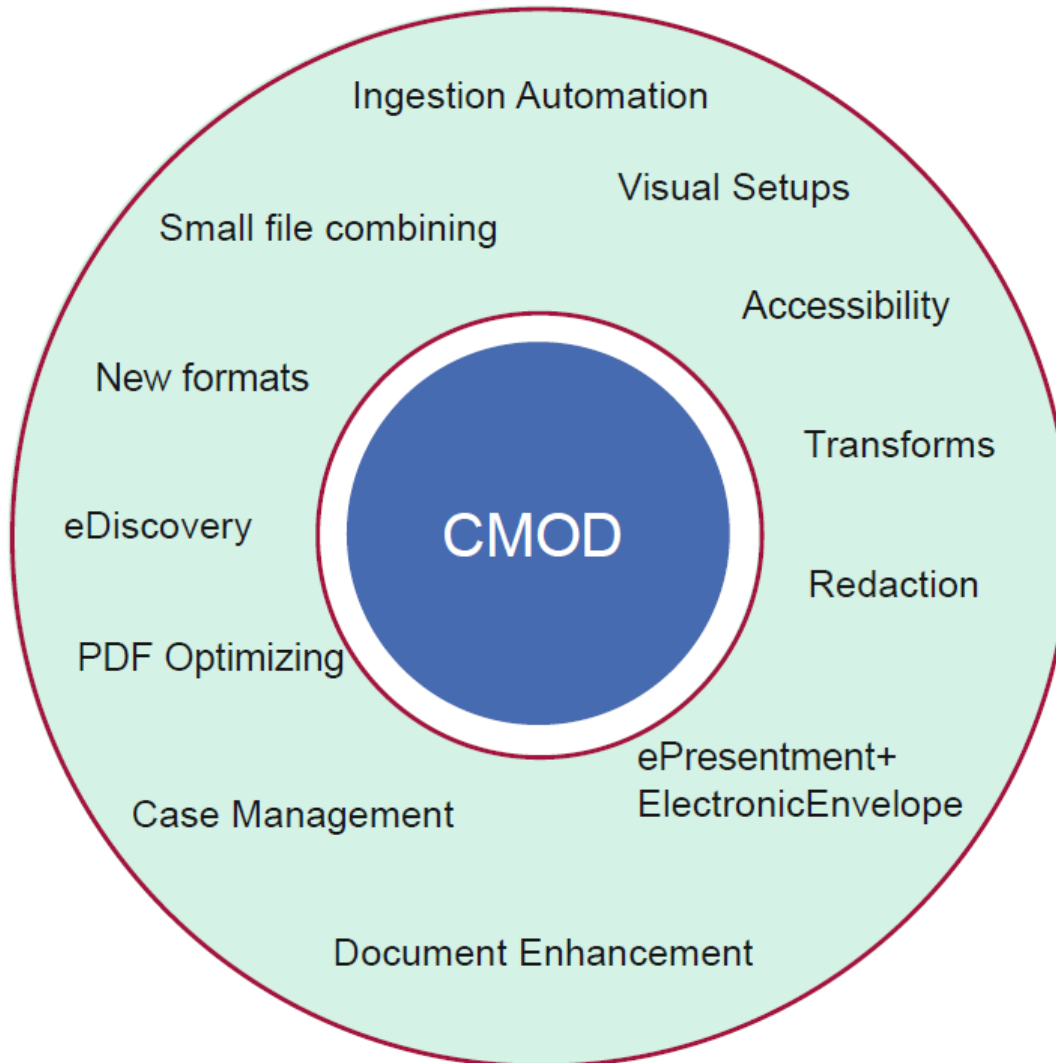


Retail – Purchase orders, store delivery receipts and inventory analysis eliminates “out-of-stock” conditions



Healthcare/Insurance – Data mining of explanations of benefits; Data source for demographic analysis of claims

Crawford CMOD Solutions



Crawford Solutions



Expand

PDF PPD Indexing
Expanded Formats
-PostScript, PCL, Xerox
-MS Office, Images
Small Files

Extend

PDF Streamlining
Accessible PDF
PDF/A
Document Security
Content Integration

CMOD
Repository

Integrate

Extract content
XML, CSV, etc.
Web Server
API
Ingestion Management

Share

Native Transforms
Electronic Envelope
Document Bundling
Output Management
Riptide

Replace Your Old Solution with OnDemand



Most Legacy Report Management Tools:

- Have not been improved in over a decade
- Run on z/OS only
- Are not sold anymore or are not important to the owning vendor
- Have gone into bankruptcy

Up to 90% storage savings through advanced compression with CM OnDemand

IBM Lab Services

Eric Leeson – Practice Manager eleeson@us.ibm.com



Migration Assessment

- Migration overview, Stakeholders strategy & goals
- End user requirements
- Report data formats, Report usage patterns
- Custom business application & exit integration
- Migration Assessment Report

Enterprise consulting

- CMOD Architecture Planning

Migration planning

- Application Transitions (exits)
- Infrastructure Transitions (Data Modeling)
- Data Migration (Historical Data)
- Transform review

Custom Development services

- Content Navigator customization
- Exit's customization

Implementation services

- CMOD Installation services
- Transforms Installation

Transition services

- Upgrade Services
- Platform, Legacy & 3rd Party Migrations
- Data Migration Services

Optimization services

- Health Check Services
- Performance Optimization Services
- Capacity Planning Services
- System Deployment Review
- System Administration Services
- Remote System Administration
- High Availability & Disaster Recovery

Business Value Assessment

Customer References

Insurance Company



- Enterprise Report Management
- CMOD Recommended by DocuLabs
- Business case for 6 existing system output repositories, including Mobius

Total Benefits
\$11M over 5 years

Net Present Value
\$3.7M

Financial Services Company



- Mobius Replacement
- Storage and license cost savings vs. Mobius

Total Benefits
\$4.9M over 5 years

Net Present Value
\$1.6M

Banking Company



- Mobius ViewDirect and ViewDirect for Networks replacement
- ViewPoint Check Images replacement

Total Benefits
\$22M over 5 years

Net Present Value
\$8.5M

Upcoming CMOD Free Workshops –

San Francisco CA, Dublin OH, Brazil, Sweden, Rome

Whether new to Content Manager OnDemand, an experienced professional, or looking to replace your current Report Management solution, join us for this two-day workshop to learn about some of these key sessions:

- **Why your organization needs Content Manager OnDemand**
- **What's new in Content Manager OnDemand Version 9.5**
- **Content Manager OnDemand best practices**
- **Content Manager OnDemand report mining capabilities**
- **Content Manager OnDemand enhanced retention management**
- **Content Manager OnDemand full text index and search**
- **Content Manager OnDemand XML capabilities**
- **IBM Content Navigator Client and Mobile Device Support**
- **Migration and conversion services to Content Manager OnDemand**

Additional Information

OnDemand Knowledge Center

<http://www-01.ibm.com/support/knowledgecenter/SSEPCD/welcome>

Get started

[Information Management Lifecycles](#)

[What's new in IBM Content Manager OnDemand for Multiplatforms](#)

[What's new in IBM Content Manager OnDemand for z/OS](#)

[What's new in IBM Content Manager OnDemand for i](#)

[What's new in the IBM Content Navigator](#)

[Content Manager OnDemand for Multiplatforms requirements matrix](#)

[Content Manager OnDemand for z/OS System requirements document](#)

[Content Manager OnDemand for i System requirements matrix](#)

Perform common tasks

[Planning](#)

[Installing](#)

[Administering](#)

[Installing and implementing ODWEK](#)

Resolve problems

[Steps for troubleshooting](#)

Additional Information

-CMOD Main Page:

<http://www-01.ibm.com/software/ecm/ondemand/>

-Content Manager OnDemand Conversion Services

ftp://ftp.software.ibm.com/software//data/sw-library/services/ECM_Content_Manager_OnDemand_Conversion_Services.pdf

-ODUG (OnDemand Users Group)

<http://odusergroup.org/>

-Frost & Sullivan “The Digital Front Office: Enabling Customer Self Service with Enterprise Content Management

<http://public.dhe.ibm.com/common/ssi/ecm/en/zzl03066usen/ZZL03066USEN.PDF>

OnDemand Advantages over the Competition:

8 reasons why OnDemand is the Leading Enterprise Report Management Solution

1. IBM is an **acknowledged industry leader** in content management solutions.
2. IBM has continued to invest in **OnDemand development**.
3. There is a **vibrant community** of users worldwide.
4. Datawatch Report Mining Server provides **industry-strength analytics**.
5. OnDemand offers the **best compression**.
6. **Mobile** Device Support.
7. Allows for **Full Text Search and Holds**.
8. Content Navigator provides a single front end and **seamless access to FileNet Content Manager, Content Manager and OnDemand repositories**.



Thank You!

Learn more about
Content Manager OnDemand

ibm.com/ondemand