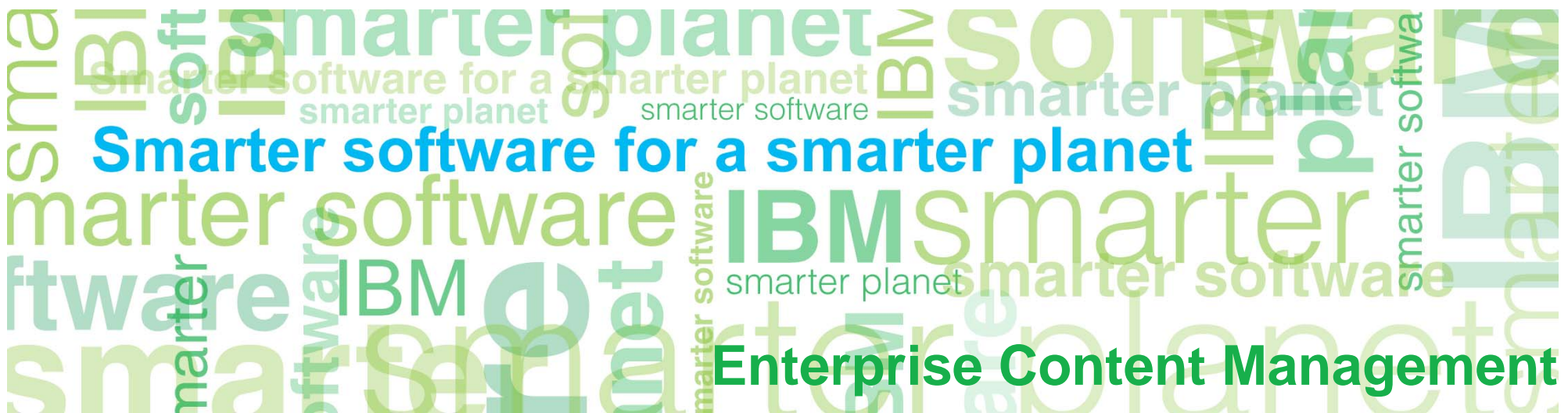


# Reduce Printing Costs and Improve Customer Service with IBM Content Manager OnDemand Software

Tuesday May 24, 2011



# Today's Speakers

- Mike Zimmer, Sales Leader, IBM Software Solutions



- Louise Hawley, Sales Leader for Report Management, IBM Software Solution



- Vanessa Stonesifer, Practice Manager, IBM Software Solutions Lab Services Migrations



# Agenda

- Enterprise Report Management
- The Business Challenges
- IBM's Solution
- IBM Services to Get Started



# Enterprise Report Management

- Every organization creates documents and receives document
- Enterprise Content Management products **IBM Content Manager** and **IBM FileNet** capture and manage all kinds of content including documents that come to your organization
  - Scanned images of paper documents
  - Office documents, Electronic forms, etc
- Enterprise Report Management product **IBM Content Manager OnDemand** captures and manages reports and transactional documents that your systems create

# Why Two Products?

*Each is finely-tuned to handle significantly different types of data*

## Report Management

- Optimized for large “loads” of many, many similar documents
- Static in nature; read-only (e.g. computer reports)

## Content Management

- Optimized for many files of varying size, format and complexity
- Interactive in nature; BPM, read/write (e.g. office documents)

➔ Forcing everything into one repository compromises the special features, scalability and performance of the solution. IBM’s 20+ years of experience in these solutions tells us it’s far better to have separate, finely-tuned repositories and ‘marry’ their User Interfaces to provide a complete view of all content

# IBM CM OnDemand

- IBM's strategic solution for Computer Output management
- A software solution that has evolved for over 20 years - constantly updated and fine-tuned to meet our customer's evolving needs
- Available for the widest variety of platforms – including z/OS, Linux on System z, and distributed platforms
- The most widely adopted solution in the marketplace
- The most respected by Industry Analysts
- Has a large, active International User Group

# Platform Considerations

- IBM provides you a choice of where to deploy
- Many IBM System z mainframe customers choose to deploy on z
  - because most of their data is created there
  - reduces network bandwidth required to download the document
  - z/OS provides unmatched reliability, availability and scalability
  - Linux on System z provides similar characteristics at a cost similar to and sometimes less than distributed servers

# Business Challenges and IBM's Solution

**Louise Hawley**

**IBM Corporation**



# The realities of the ‘paperless office’

- The “paperless office” is possible but NOT reality for most organizations
  - High percentage of business information still resides on paper
  - Paper, faxes, mail, copies, files, file cabinets ...
- Paper-based systems drive growing costs:
  - Document sharing results in lost files & risks
  - Lack of flexibility, visibility and control
  - Governance and disaster recovery
- Variety causes inconsistent business practices:
  - Paper, email, attachments, office documents ...
  - Information recognition and extraction
  - Classification, validation, workflow
  - Customer responsiveness and service quality



# Confused about Enterprise Content Management?



# Business Pressures

- Inability to access transactional content in easily-digested and shared forms that match user needs and skill sets
- Siloed information across the organization
- Reduced user productivity related to complex search requirements, and inaccessible or unindexed data
- Reduced customer satisfaction because of a lack of self-service capabilities and slower customer-service response times
- Higher content-management, printing and storage costs
- Compliance requirements across the enterprise



# Common Business Problems



# IBM Enterprise Report Management

Essential for high volume print output: e-capture and e-presentment

## Desired business outcomes

- Improved customer responsiveness
- Web access: to print/paper documents, 24x7
- Improved customer self-service
- Reduced printing costs and paper use: go green
- Avoid storing print/paper documents
- Replacement of legacy systems

### Solution summary

- A 'View Not Print Solution' for customer service & avoidance of print and storage costs
- Fast and significant ROI
- Up to 90% storage savings
- Proven, scalable technology
- Pervasive access
- Replacement for outdated systems

*“Reduced costs for printed customer bills saving \$25 million annually. Increased small business customer satisfaction and gained \$750,000 in promise-to-pay revenue during initial six months of operation”*

— A large telecommunications company

# Uses for Content Manager OnDemand

- e-Statement Presentment

- Front office application

- Presenting of customer data in customer service environments
- Self Service or call centers



- e-Report Management

- Back office application

- Managing of access to information contained in reports (which can be considered snapshots of a database in time)
- Delivery for analysis

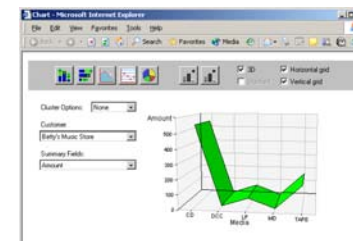


21/01/99 CLASSICAL MUSIC DISTRIBUTORS PAGE 01  
 10:17 MONTHLY SHIPPING REPORT  
 FROM 10/01/99 TO 10/31/99

CUSTOMER: Betty's Music Store  
 Montclair Plaza  
 200 Union Turnpike  
 Cedar Falls, IA 50613

ACCOUNT NUMBER: 1197  
 CONTACT: Betty Vider

QUANTITY	DESCRIPTION	ORDER NUMBER	SHIP DATE	LABEL NO.	UNIT PRICE	AMOUNT
4	Bach, J.S. Sonatas for Solo Violin	42013-2	10/26/99	80-42013	8.99	35.96
7	Mozart, Piano in G, K. 417	42013-2			7.00	49.00
2	Liszt, Electronic Music	CD 411	10/13	20.39		
9	Beethoven, Violin Concerto	801-42013			5.99	53.91
TAX						
ORDER NUMBER: 51009 SHIP DATE: 10/11/99						
11	Beethoven, Fantasia Sonata, Arco	42013-2			3.99	43.89
8	Handel, Harpsichord, The Music of the Pleiades	CD 4102	9/29	71.99		
10	Pisetti, Maria di Jacopo	CDAN 0964	9/29	31.90		
TAX						
4	Misc., Modern Trombone Maintenance	ADA 51009	10/29	44.74		
4	Carroll, An American in Paris	ACS 8034	1/99	35.94		



# However.., It's Not Just Report Management Anymore

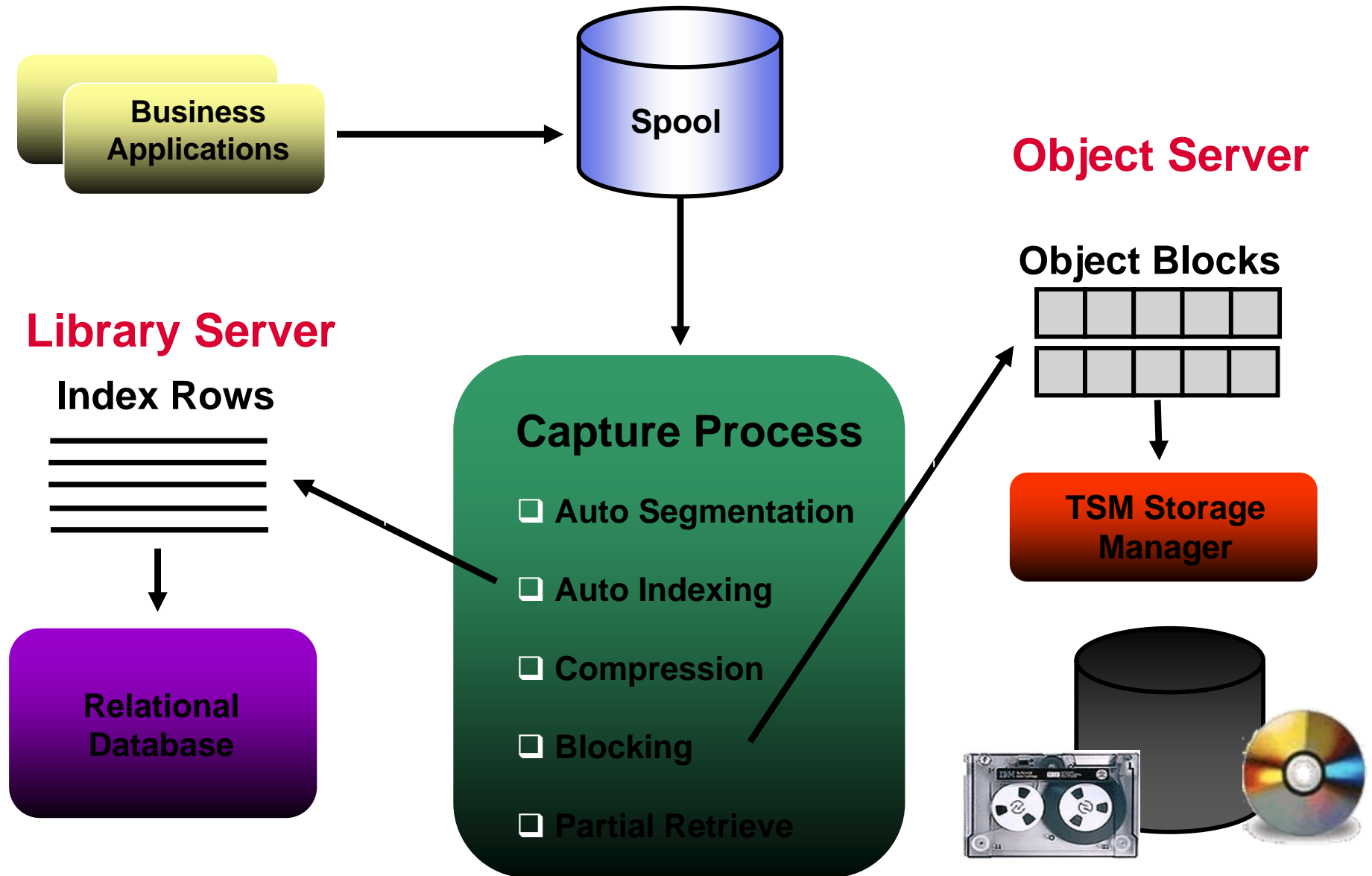
## ■ Traditional use cases

- Microfiche Replacement
- Report Distribution
  - Data extracted out of archive and delivered in paper or electronic form to end users
- Electronic Bill Payment and Presentment
  - Using the internet to deliver statements
    - ✓ Able to offer additional services by adding additional advertising
- Enterprise Report Management not being purchased as a standalone solution, but rather as a part of the overall Enterprise Content Management (ECM) decision
- Need to leverage data in the repository

## ■ Emerging use cases

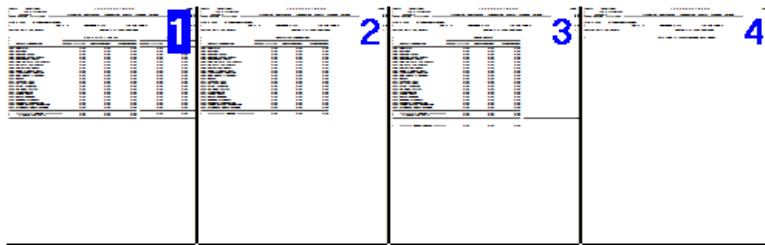
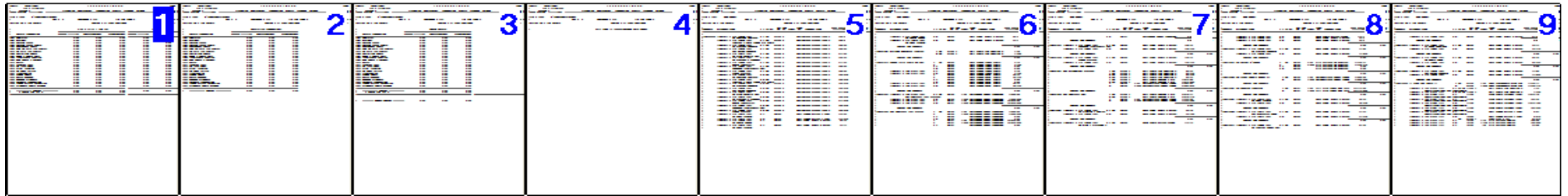
- Compliance
- Transform into useful, insightful, and in-context information
  - Extraction and assembling/composing new documents
  - Report Mining
  - Analysis

# OnDemand Document Capture

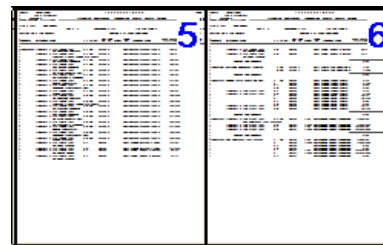




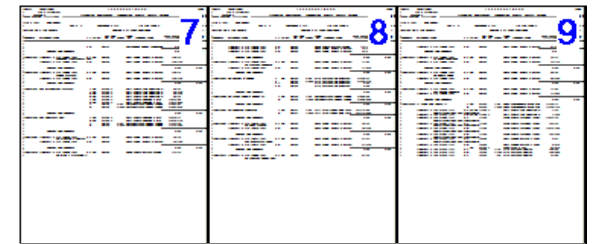
# SEGMENTATION      COMPRESSION      INDEXING



John Smith  
123-11-2001



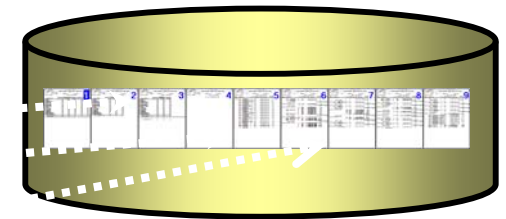
Ron Smith  
523-22-6678



William Smith  
709-03-4332

## DATABASE

John Smith	123-11-2001
Ron Smith	523-22-6678
William Smith	709-03-4332



# Content Manager OnDemand v8.4.1

## ■ Themes

- Enhanced retention management
- Integration with IBM FileNet P8 – Business Process Manager (BPM), Content Manager and Records Manager
- Other functional and performance enhancements



# Enhanced Retention Management

- Enhanced Retention Management is built directly into CMOD
  - Includes the ability to suspend (lockdown) individual documents within a report
- Enable/Disable ERM
- Implied Hold
- Load expiration type
- Lockdown field

The screenshot shows a 'Database Information' dialog box with the following settings:

- Database Organization:**
  - Maximum Rows: 10000000
  - Multiple loads per database table
  - Single load per database table
  - Create Tablespace Type:
    - SMS
    - None
- Annotation:**
  - Annotation flags in document database table?
    - Yes
    - No
- Enhanced Retention Management:**
  - Application group uses Enhanced Retention Management?
    - Yes
    - Implied hold
    - No
- Interoperate with FileNet P8 Platform:**
  - Use Content Federation Services (CFS-OD)?
    - Yes
      - Federate documents automatically
      - Enable FileNet Records Manager to records declare automatically
    - No
  - Query using parameter markers

Buttons: OK, Cancel, Help

# PDF Enhancements

- Improved ingestion performance and storage with CMOD PDF indexer
  - PDF resources stored separately
  - 30% - 50% improvement in ingestion performance
    - Overall performance improvements
    - Resource collection
    - Removed unused resources
    - New parameter RESTYPE in the Application Indexing parameters controls resource collection

# Integration with IBM FileNet P8

- Integration with IBM FileNet P8
  - Unified search and view CMOD content and IBM P8 content
  - Leverage CMOD content in IBM FileNet BPM applications
  - Manage CMOD Content as records in IBM FileNet Records Manager
  
- This in addition to integration with IBM Content Manager (CM8) that has been part of CM OnDemand for many years.

## Ball State University

# Smart is: eliminating storage facilities

*“With IBM ECM all of a sudden information is available—as it’s needed and where it’s needed.”*

*— Charles Tuite, Lead ECM Architect,  
Ball State University*

*Industry context: education*

*Value driver: improve process efficiency*

*Solution onramp: document imaging & capture*

### Business Challenge

Provide university faculty and staff with better access to information to help improve productivity and optimize organizational performance

### What’s Smart?

Deployed 50+ applications storing ~10M documents and facilitating intelligent collection and delivery of content

### Smarter Business Outcomes

- Freed up 75,000 sq. ft. facility used for storage
- Solved customer service request challenges
- Saved significant time enabling staff to focus on student outreach and organizational growth



## Ball State University

# Reducing production printing cost by 50%

### The need

- To provide University faculty and staff with better access to information.
- To help improve productivity and optimize organizational performance.

### The solution

- An enterprise content management solution within a service oriented architecture.
- The solution facilitates intelligent aggregation and delivery of content regardless of where it is stored.

### The benefits

- Expected to reduce production printing costs by 50%
- Significant time savings enabling staff to spend more time on student outreach and organizational growth
- Innovative learning opportunities that give students a competitive advantage in the job market

*“With IBM ECM all of a sudden information is available—as it’s needed and where it’s needed.”*

*— Charles Tuite, Lead Enterprise Content Management Architect, Ball State University*



BALL STATE  
UNIVERSITY.

## A large bank in South Africa

### The need

- To print, copy and ship 500,000 documents a month.
- To prevent each group having their own team perform duplicate processes.
- To keep client information from being scattered throughout the organization.
- To remedy legal compliance issues created by in excess of 20 million statements created per month with multiple formats and no audit trail of posted correspondence.

### The solution

- Content federation opens up new opportunities by providing a view all content within the Content Library as well as any federated stores from a common viewer and providing single-view of client
- Eliminated process duplication by providing enterprise content taxonomy which allows for standardized classification of content as well as Records management that provides audit trail and reduces risk

### The benefits

- Annual saving of \$715,000 due to paper elimination
- \$3 million savings year over year for every 5% customer base uptake of digital statements over paper
- Approximately 1 mil USD saved annually on paper storage costs
- Reduced turn-around times from 7 days to 7 minute

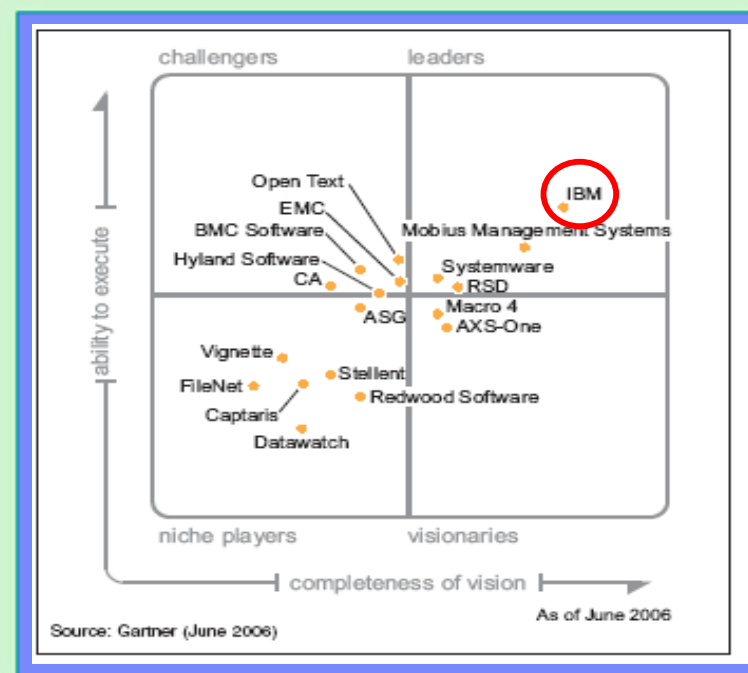
### Why IBM?

- Trusted advisor
- Sustainable partnership
- Embarked on journey to develop a long- term strategy



# Why IBM

- Clear leader in the Enterprise Report Management Space
- Stability of IBM
  - Content Manager OnDemand is the strategic direction for Enterprise Report Management
  - IBM is investing large sums of money in development and continues to enhance the product
  - OnDemand is the clear industry leader in the Enterprise Report Management space
- CMOD offers a relational database
  - Requires only 1 row per document loaded in OnDemand instead of a row for each index value
  - Database uses tablespace structure
  - Provides for 24 x 7 operation without having to bring the system down for 're-cataloging.
  - More up time and less DBA assistance



# Why IBM

- CMOD has direct integration point popular System z security such as RACF and Top Secret
- Integration with LDAP
- Enhanced Retention Management within OnDemand
  - Provides the ability to place a hold or multiple holds on a single or multiple
- Integration with IBM Enterprise Records
  - Can take advantage of corporate record policies by allowing for a single or multiple documents to be declared as a legal record and pass control of the record or records to a certified records management product (IBM Enterprise Records)



# Why IBM

- OnDemand is efficient and scalable
  - Supports petabytes of data and thousands of users
  - Manages information very efficiently – minimizing database overhead
  - Uses object aggregation to achieve high compression ratios
    - More than 10:1 for some types of data
  - Transfers data compressed from server to client when possible
- The largest OnDemand customers currently have:
  - More than 150 Billion objects stored
  - Millions of retrievals per day
  - More than 25 petabytes of data



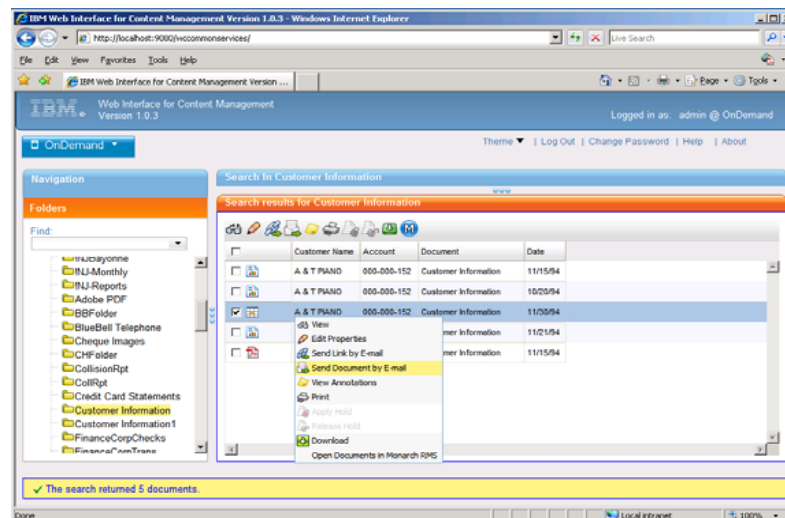
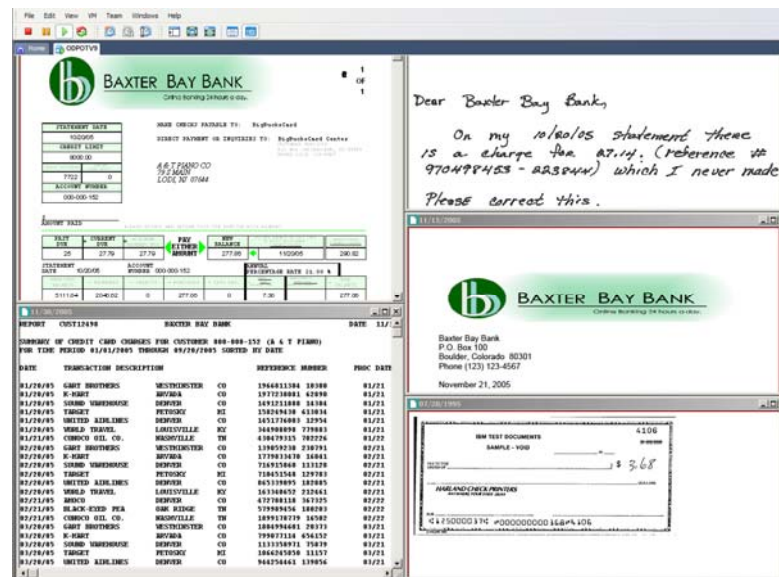
# Why IBM

- Flexibility of multiple object servers for Global use
  - OnDemand is built with a Library / Object Server structure that provides the ability to have a single Library Server and multiple Object Servers
- OnDemand Roadmap is well defined
  - IBM continues to add features and function to the product
  - Roadmap is out several years



# Why IBM

- Flexibility of available clients and installation is quick and easy
  - WEBi
  - Windows Desktop Client
  - CICS/3270
  - Internet clients CGI, Servlets, Java, (ODWEK)
  - Structured API's (z/OS)
  - DDE and OLE API's
  - IBM does not charge for specific clients – only a user license and the end user can use one or all clients in combination



# Why IBM

- Perpetual license
  - IBM never asks for you to renew your original contract. The server and user licenses are a OTC
  - Customer pays yearly support and subscription which provides all support and upgrades at no charge

# Summary

## ▪ **OnDemand provides:**

- Ability to manage and enable access to all computer generated output such as bills, invoices, statements, confirms and reports across all business units reducing the overall cost of operations
- The ability to satisfy customer inquiries on first call eliminating unnecessary call backs and their associated costs
- Reduction of paper and its associated costs within the key business areas of customer service and account management
- Providing customers with 24x7 online access to their consolidated statements and account information results in better customer satisfaction, improves customer retention and reduces call center costs
- Provides option for customized and personalized statements, confirms and mailings
- Adherence to compliance requirements reduces possible fines

# Demonstration

**Louise Hawley**

**IBM Corporation**



# Migration Services

**Vanessa Stonesifer**

**IBM Corporation**

# *Why Engage IBM ECM Software Services?*

- Total Solution
- Lowest Risk
- Best Value

# Total Solution

- IBM ECM Software Services provides a Total Solution, with a single point of contact
  
- Typical migration tasks include:
  - Converting to a new database, security environment, or web application server
  - Modifying the environment configuration, i.e. implementing high availability, clustered servers in all platforms –
    - System z – z/OS, Linux on System z
    - All open System platforms
  - Customizing/enhancing existing applications
  - Converting storage environment
  - Upgrading or converting products
  - Converting Report Distribution
  - Implementing Compliance Information Management, i.e. Records Management, Enhanced Retention management
  
- Software Services is equipped to handle all of these scenarios and more, providing 'one-stop shopping' for all ECM Migration needs

## Lowest Risk

### ■ IBM's ECM Software Services Resources

#### –Have Highest level of experience

- Ongoing customer engagements with report management migrations
- 17+ year average skill level within delivery team
- Multi-platform experience across hardware / database / security
- Broad base of skills

#### –Partners with Product Development team

- Co-develop new processes / procedures / documentation with Product team
- Participate in Early adopter program to test new product features/functions
- Access to internal product tools
- Access to latest / more specific documentation than what is published

#### –Over 17 years of “*Best Practiced*” methodology

#### –In-depth knowledge and experience yields low risk to customer

## *Best Value*

- IBM Provides the best Value because:
  - **Industry best practices applied to every engagement**
    - Standard procedures & checklists insure efficiency
  - **Greater experience means faster deployment**
  - **IBM ECM Software Services provides superior product mentoring and skills transfer session for customers**
  - **IBM ECM Software Services is best at enabling customers to exploit new features/functions in Content Manager OnDemand**
  - **IBM Education offers Free Enterprise Training Plans**
    - A skills assessment & training roadmap to insure that:
      - **The right people, receive the right training at the right time**

# ECM Lab Services Migration Experience

- Mobius ViewDirect
- CA View and Deliver
- CA Dispatch
- CA Bundl
- Control D
- FileTek AMMO
- EOS
- Anacomp
- FileNet Report Manager
- CMOD
- RMDS
- IBM Content Manager
- ImagePlus
- and more...

# Questions?

**For additional information visit**

[ibm.com/software/data/ondemand/](http://ibm.com/software/data/ondemand/)

or contact Mike Zimmer, IBM Corporation

(716) 908-5830 or [mzimmer@us.ibm.com](mailto:mzimmer@us.ibm.com)