# Gestión de Contenidos Empresariales: La Solución Completa: IBM ECM

**Javier Grandío Garaicoechea**
**Responsable Técnico IBM ECM FSS SPIGIT**

**Information Management** software

# A día de hoy, se sabe que el Volumen y la variedad de Information seguirá en continuo crecimiento.

IDC predice un crecimiento del 61% al 81% para el periodo 2007- 2010

Data and source types plotted on the data continuum

**Three Major Areas within Data Continuum**



Anticipated Decrease or Increase over Next Three Years
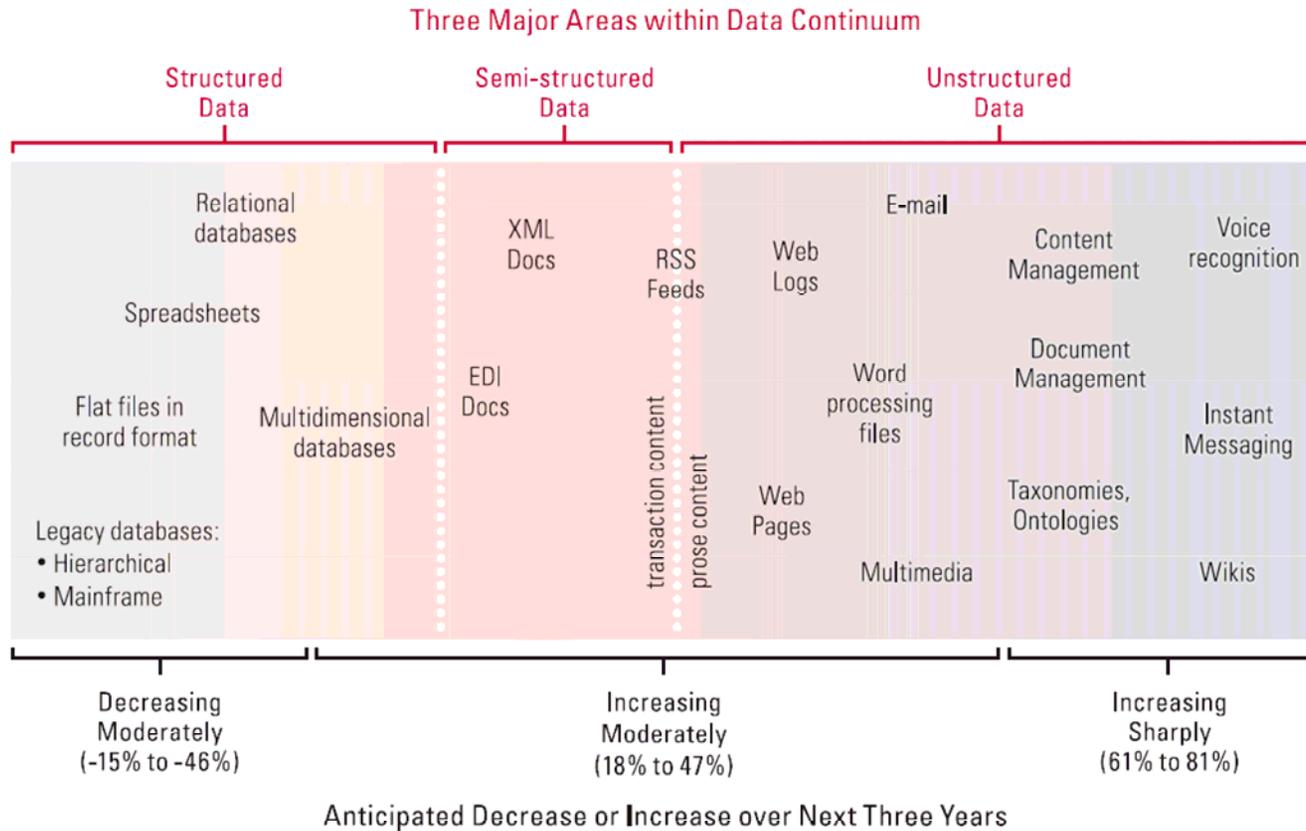
TDWI: BI Search and Text Analytics, Phillip Russom, 2Q 2007

# Contenido a nivel Empresarial:

**Un elemento esencial que sigue creciendo**
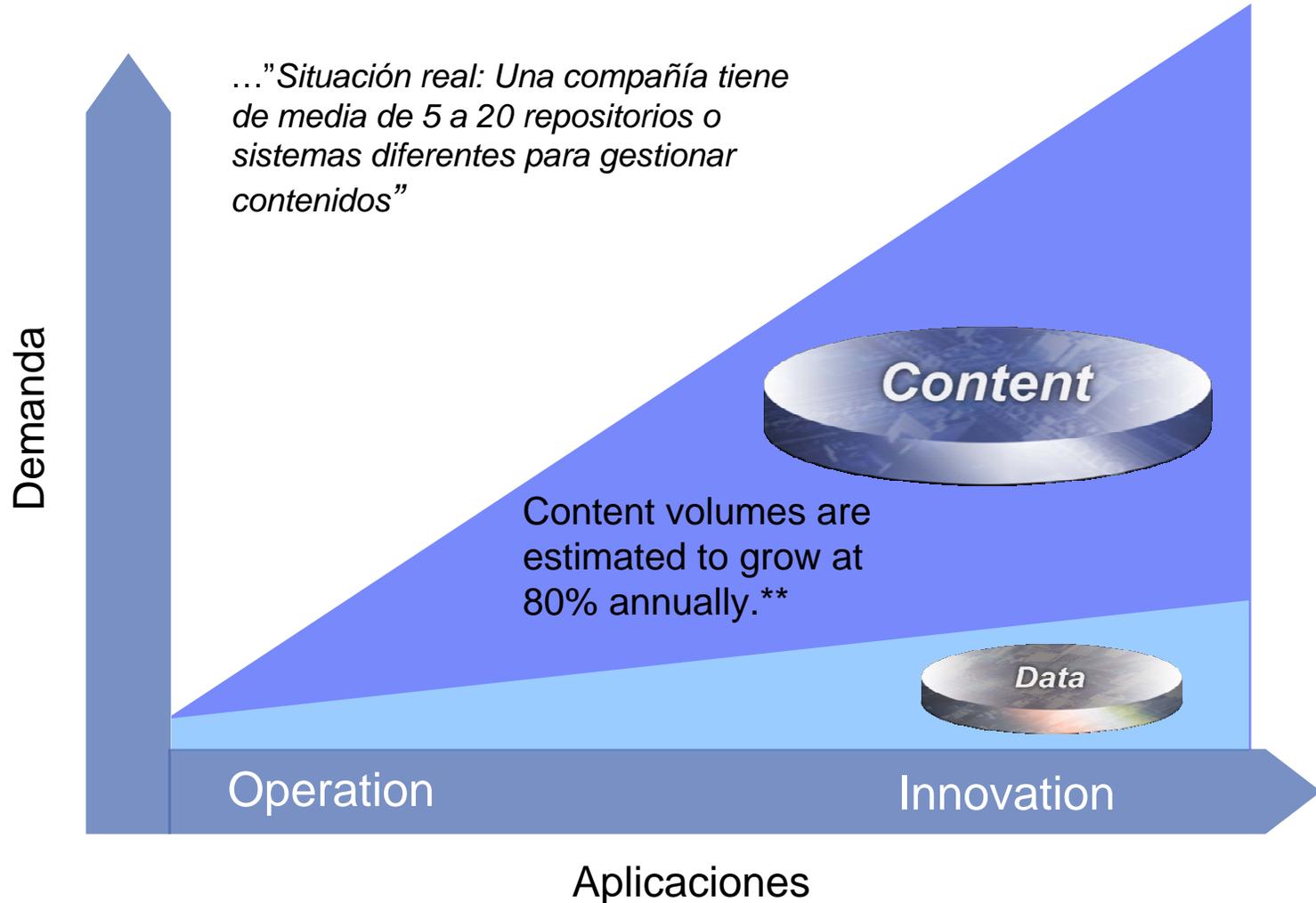
…"*Situación real: Una compañía tiene de media de 5 a 20 repositorios o sistemas diferentes para gestionar contenidos*"

**Demanda**

Content volumes are estimated to grow at 80% annually.**

**Content**

**Data**

Operation

Innovation

**Aplicaciones**

# ¿Qué es *"Enterprise Content Management"*?



Acceso Seguro

Distribución Personalizada

Informes

Media

Documentos

Transacciones

Web Content

Integración

E-mail

Almacenamiento

Procesos

Búsqueda

Records Management

Colaboración

"Enterprise Content Management (ECM) son las tecnologías para capturar o crear, almacenar, administrar, preservar y distribuir contenidos y documentos relacionados vinculados a los procesos de las organizaciones. Las herramientas de ECM y sus estrategias permiten la administración de cualquier tipo de información" Fuente: www.aiim.org

Versión "no marketing" ☺

eForm

Lotus. Quickr

metadata

Microsoft Office

Lotus. Quickr

Platform / Engines

Storage

WEB

**Cualquier empresa es un conjunto muy complejo de elementos, pero la base de todo ello es la Información**



Fabricantes Proveedores

Mi Empresa.

Clientes

Personas • Información • Procesos • Sistemas / Tecnología

Normativas, Estándares, Regulaciones
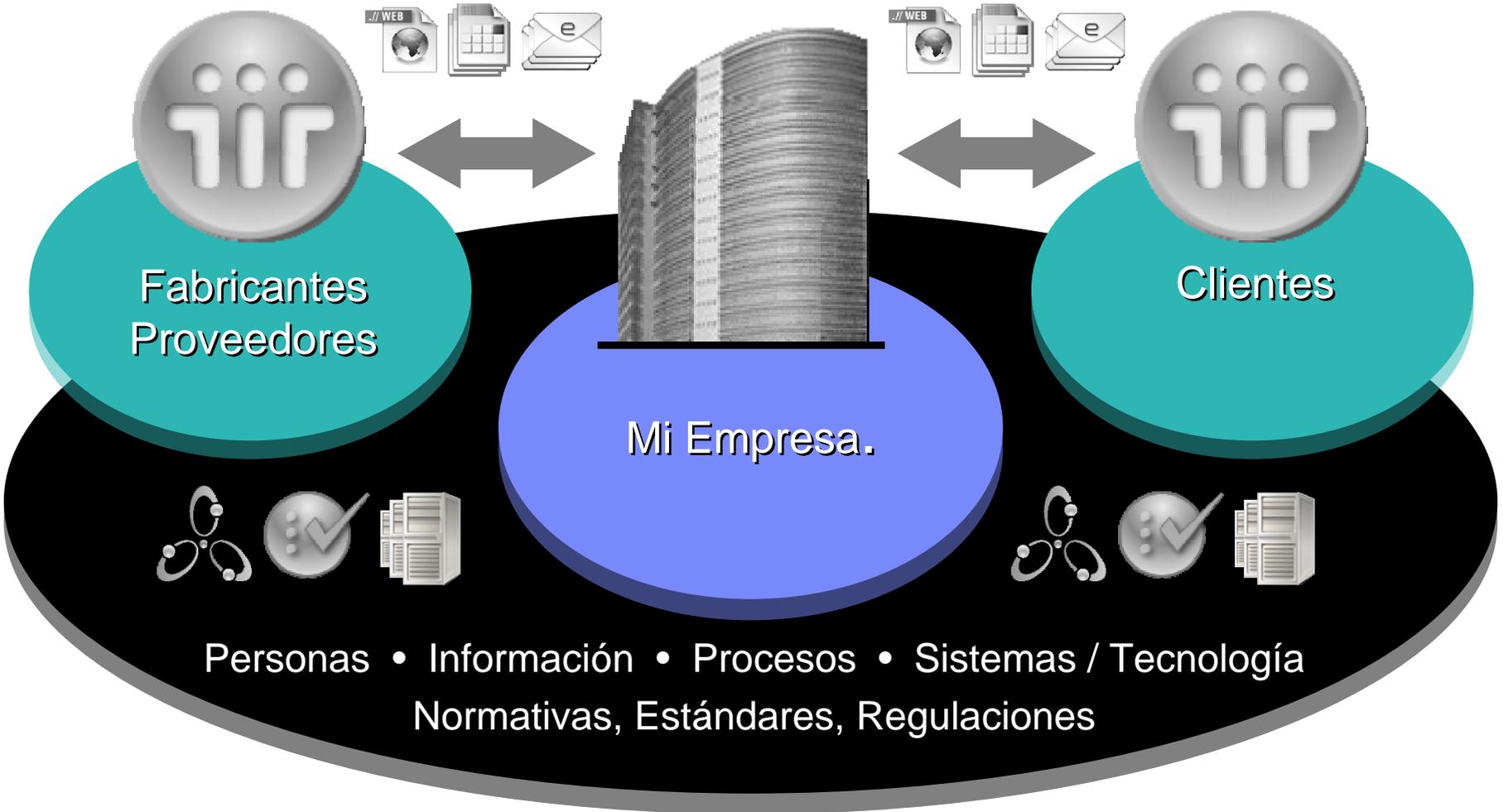
# ¿Quién se beneficia de una solución ECM?

## Responsables de Negocio
### CxOs, LOBs

- Provee: Despliegue de conocimiento para poder innovar y expandir el negocio.
- Recibe: Impactar en las operaciones para obtener mejores resultados y en un tiempo mucho menor.

## Creadores de Contenidos
### Aplicaciones, Procesos y Documentos

- Provee: Métodos y aplicaciones para proveer la información real, de confianza y vital a mis procesos de negocio
- Recibe: Mejora contínua de los procesos de Operaciones mediante nuevos despliegues en base a esa información disponible.

## Expertos IT
### IT Architects, Developers

- Provee: Soluciones efectivas en tiempo y costes que permiten administrar y desplegar información a demanda.
- Recibe: Un único punto de distribución de toda la información para integrarla en toda la arquitectura de la empresa

## Usuarios de Negocio
### Clientes, Empleados y Partners

- Provee: Tareas, Escalado, Aprobaciones, Contenidos, Formularios para sus procesos de negocio.
- Recibe: Mejora de los procesos mediante excepciones, controles y sobre todo por disponer de la información vital en los ellos.

# IBM ECM: Obtener más valor del contenido
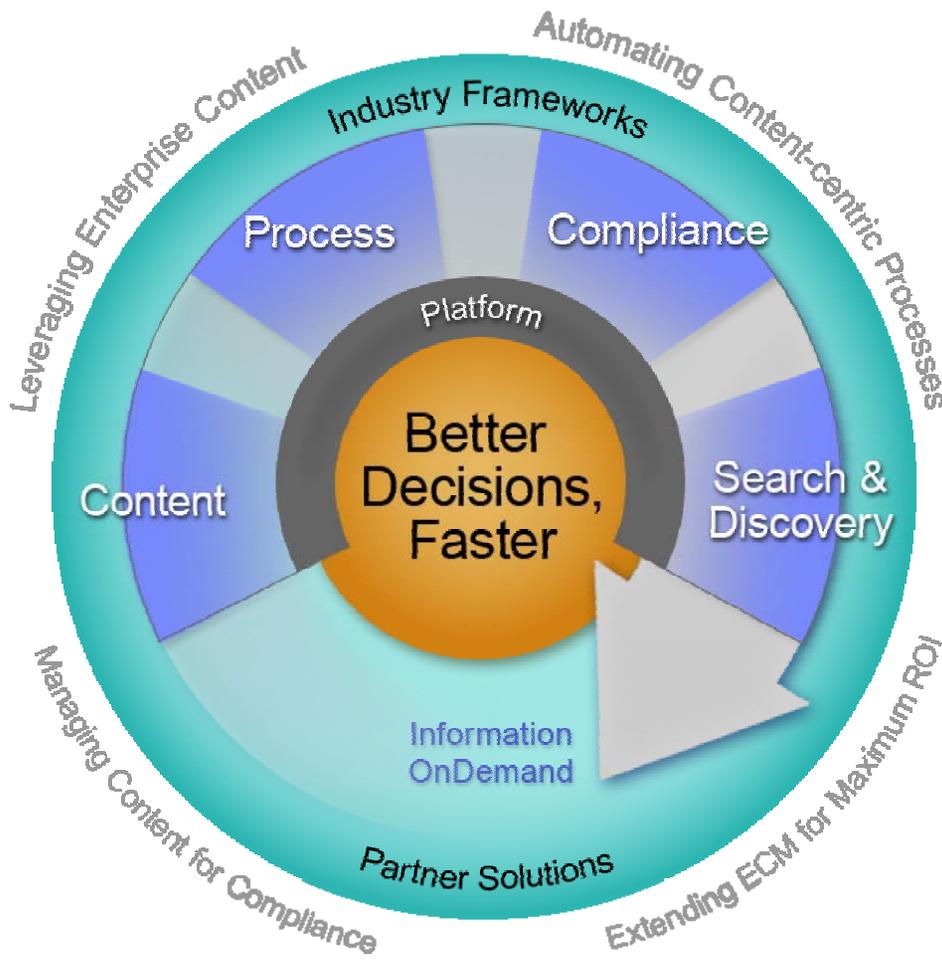


IBM ECM ayuda a las empresas a tomar mejores decisiones más rápido por:

- Gestión de contenidos
- Optimización de los procesos de negocio
- Cumplimiento de las normas internas de la compañía

a través de una infraestructura de información integrada

# ECM Product Vision



**Flexible User Interfaces**

Portals | Content-Enabled Applications | Composite Applications | Collaboration

**Business Process Management Services**

- Modeling & Simulation
- Business Activity Monitoring
- Content Centric Processing
- Rules & Pre-built Frameworks
- Process Choreography

**Compliance & Records Management Services**

Retention | Holds | Risk Mgt | Governance | eDiscovery | File Plans | Archive

**Enterprise Content Services**

Information Servers
Content Analytics
Enterprise Search

Categorization | Forms | DAM | WCM | Images | Email
Report Mgt | Taxonomy | Documents | Capture | Media

Master Data Mgt
Business Intelligence
Industry Models

Federation & Integration Services

**Repositories**

Data Servers | IBM | Other | Storage

Services Oriented Architecture (SOA)
Software as a Service (SaaS)

Pervasive Persuasive

Business Agility

Enterprise Compliance

Active Content

Content Anywhere

IBM



**IBM Strategy for Enterprise Content Management**

- Records Management & Federation
- Business Process Management
- eDiscovery Management & Analysis
- Content Collection & Archiving
- Content & Process & Compliance Lifecycle
- ECM Platform
- Information Infrastructure

- Records Management & Federation
- Busines Process Management
- eDiscovery Management & Analysis
- **1** Content Collection & Archiving
- Content Compliance Lifecycle

ECM Platform

Information Infrastructure

# IBM ECM: *Repositorios Documentales Escalables*

**IBM Content Manager**
Robust stand-alone content repository
Supports enterprise-class content applications

**IBM Content Manager On Demand**
Enterprise report management (COLD)
Ultra-scalable image and document storage

**IBM FileNet Content Manager**
Robust enterprise content platform
Integrated application and process engines

## Repositories

IBM CM     IBM CM On Demand     IBM FileNet     Other

# IBM ECM: *Federación de Contenidos*



**IBM FileNet P8**

**Records Management**

**Business Process Management**

**Content Federation Services**

FileNet P8 CM | FileNet Image Services | FileNet Content Services | Open Text | Documentum | IBM OnDemand | IBM CM8

File   Edit   View   Favorites   Tools   Help

Back   |   Search   Favorites   |   Go

Address   http://ibm-hjdszojrb12:9081/wccommonservices/   |   Go

**IBM®**   Web Interface for Content Management
Version 1.0.2

Logged in as:   icmadmi
Theme   |   Log Ou

## Navigation

**Mode:**   ● Search   ○ ✔Workflow

- CM
  - Find
    - [                    ]
    - All
    - Recent
      - Insurance claims
      - State Forms
      - Sample Item Type
      - NOINDEX
  - On Demand

## Search In Insurance claims

### Search results for Insurance claims

Page: [1 ▼] of 1   Now Showing: 1 to 6 of 6

| | | Title | Claim Number | Policy Owner | Approved by | FileNa |
|---|---|---|---|---|---|---|
| ☐ | 📁 | Insurance Claims | | | | |
| ☑ | 🖼 ✔ | A11167543 Accident photo | C5783563 | Adam McDoogle | Barney Wilson | 3main |
| ☑ | 📕 | A11167543 Accident claim form | C5783563 | Adam McDoogle | Barney Wilson | Skysc |
| ☐ | 🖼 | sion report | 0120200130 | Gregory Twain | Ben Herman | 01202 |
| ☐ | 🖼 | n | 4852369 | George Tolstoy | Alison McBRoom | 4-852 |
| ☐ | 🖼 | laration | 00013468 | Erin McCarley | John Sams | 10274 |

Context menu:
- 👓 View
- 📝 Edit Document
- 📝 Edit Properties
- 📧 Send Link by E-mail
- 📧 Send Document by E-mail
- ⬇ Download
- ✔ Check Out
- ✔ Cancel Check Out
- ✔ Check in
- ▶ Start on Workflow

# Workplace XT

## Integración con Office



*Ribbon Bar Con grupos de comandos de ECM*

# Integración con Lotus Quickr

1

## Integración con SharePoint 2007

**1**

# IBM Content Manager OnDemand

**1**

## Captura electrónica y presentación de listados, reduciendo los costes de impresión

- Ingesta e indexación de alto volumen

- Gestión de almacenamiento automatizada y optimizada

- Alta escalabilidad

- Interoperatividad entre plataformas

IBM.



**2**

**Business Process Management**

Records Management & Federation

eDiscovery Management & Analysis

Content Collection & Archiving

Process Compliance Lifecycle

**ECM Platform**

**Information Infrastructure**

# Principales Beneficios de BPM

**2**
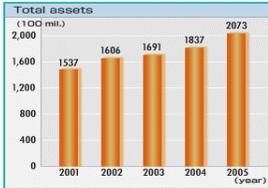
- Mejora de la eficacia en el negocio

- Mayor Visibilidad y Control

- Seguimiento de los KPIs

- Garantiza que el Proceso sigue la Normativa establecida

# IBM ECM: *Concepto de Contenido Activo*

**1**

- Content Manager utilizará eventos que lanzan procesos basados en P8 BPM

- Se incluyen eventos como añadir contenidos, actualizarlos, borrarlos, etc.

**Content**

**Evento sobre contenido de CM**

**Lanzamiento de un proceso**

# El Ciclo de Vida del BPM

**2**



**BPM**

- Definición
- Modelado
- Simulación
- Despliegue
- Ejecución
- Monitor
- Análisis
- Optimización
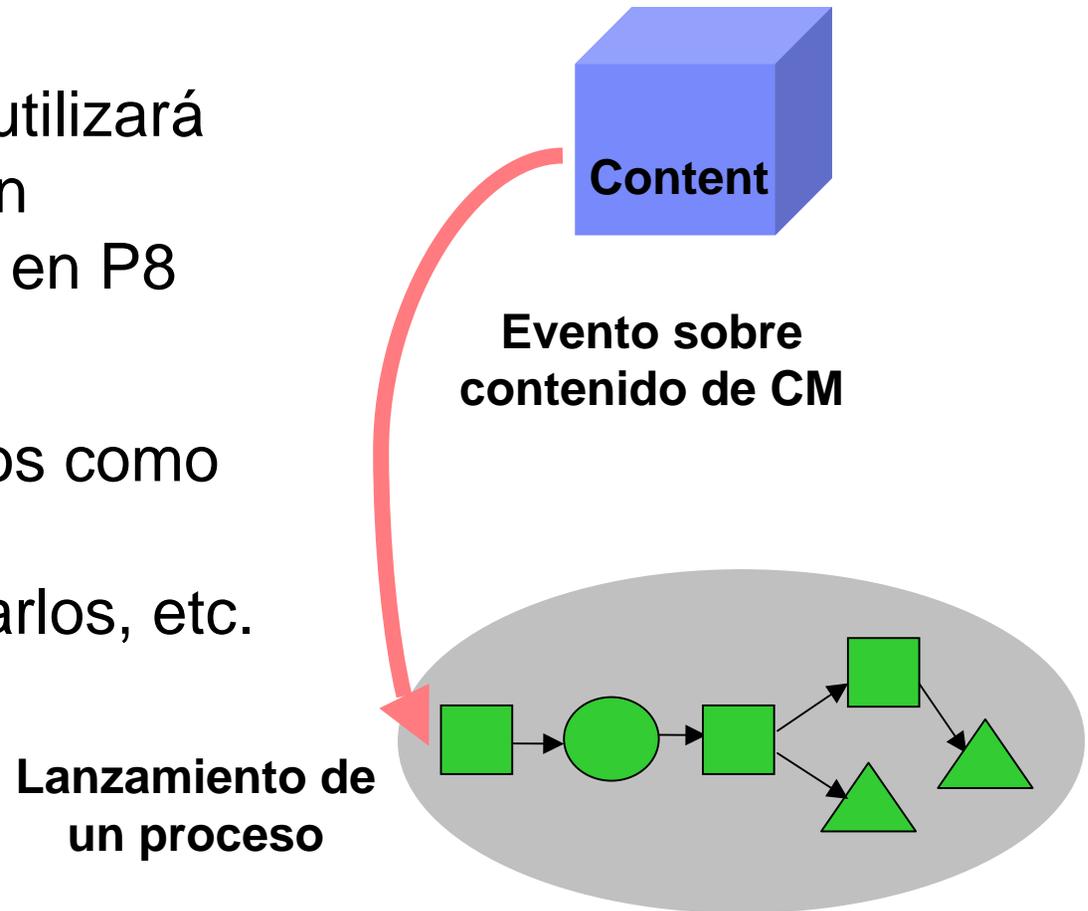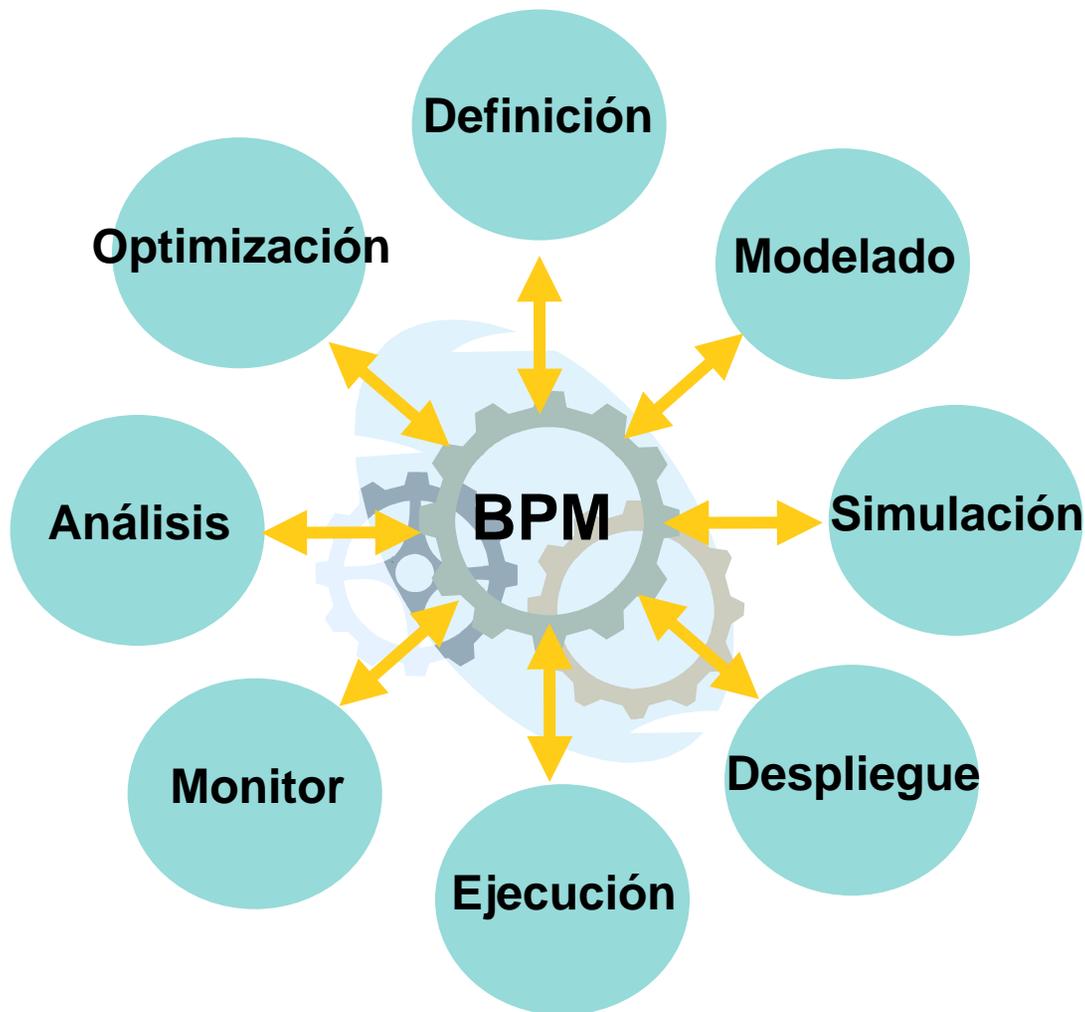
**Source: Gartner, Feb. 2007**

# BPM

## Process Modeller

Model and
Specification Phase

Pools
Work-streams
BPMN

## Process Designer



## Process Engine

Process
Database
Event Log
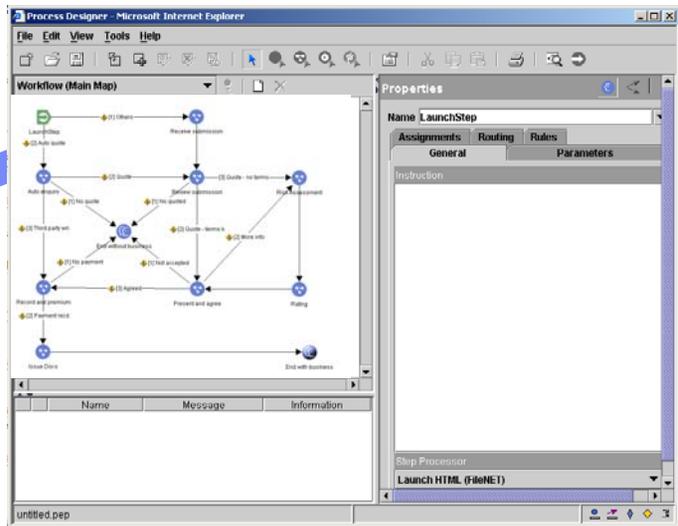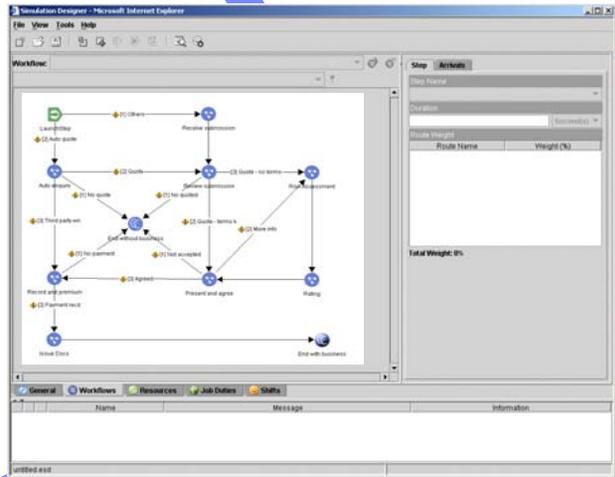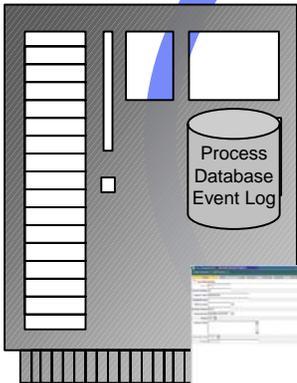
## Process Simulator



## Business Activity Monitor
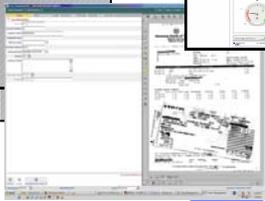


## Business Process Framework
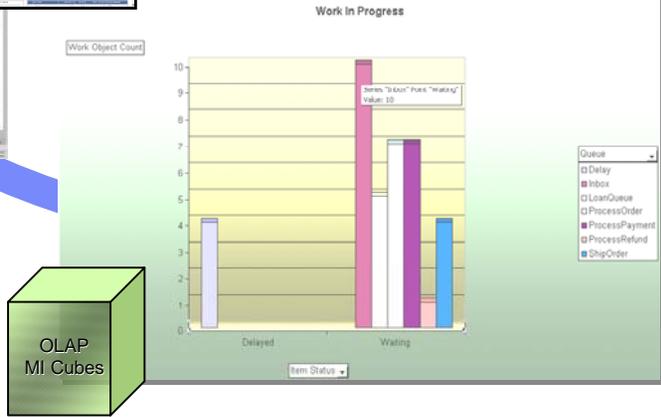
OLAP
MI Cubes

## Process Analyser

# BPM Solution Designer

File   Edit   View   Tools   Help

**②**

**Main Claims Process** ⊠

Workflow (Main Map)

Creates claim folder, assigns Claim Adjustor,...

Arrange Rental Car

Rental Needed=true

Start → Claim Setup → Initial Review → Decision

Est Amt > 5000

[2] Amount > 1000

[1] Amt <=10

[2] Approved

Fraud Assessment          Create

[1] Escalate

[3] Denied
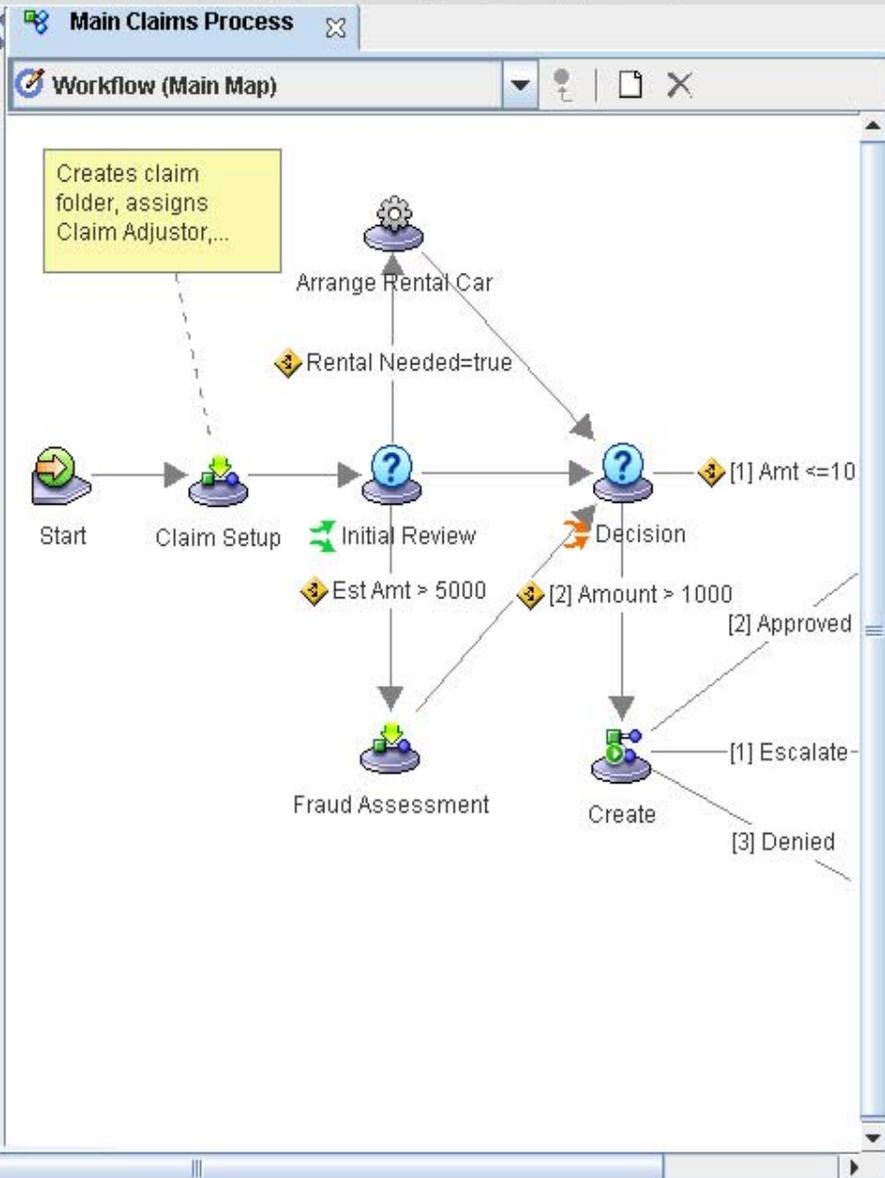
## Properties

Name  **Supervisor Review**

**General**   Routing

### Description

### Resource

**Supervisor**

### Step UI

**Decision UI**

### Duration

30                          **Minutes**

## Step Palette

General          Submap

# Diseño de Soluciones BPM
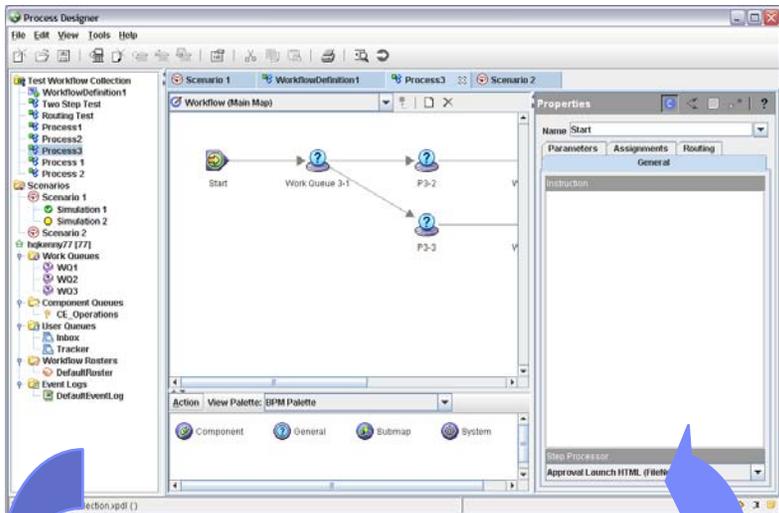


*Diseño/Desarrollo*
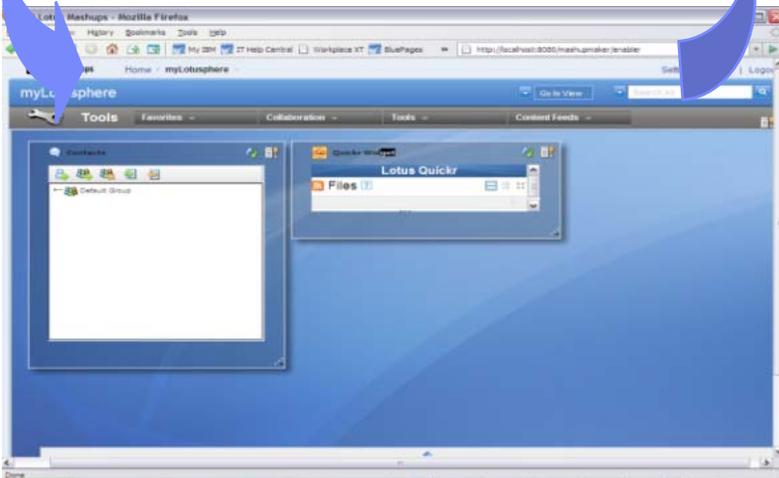
*Integración/Ensamblado*

Datos de
Definición de la
Solución

## Aplicación final basada en Roles
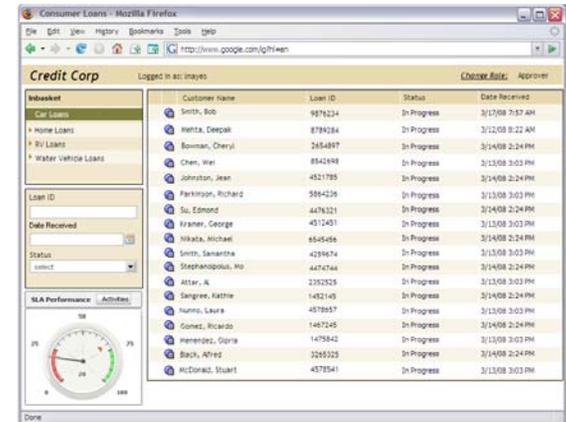


Examples
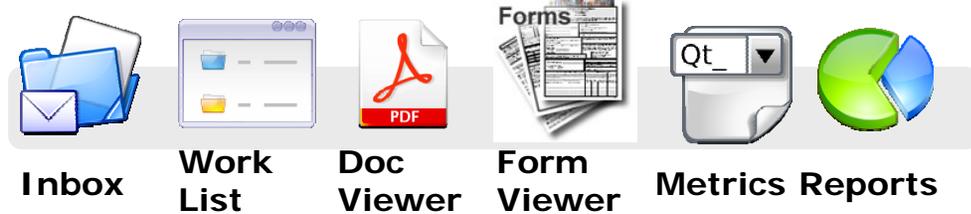


**Inbox**   **Work List**   **Doc Viewer**   **Form Viewer**   **Metrics Reports**

**focus**

| Case | Attachments | Audit |
|------|-------------|-------|

## Case Information

Case Number 156933

Last Name Smith

Assistance Amount 1,500.00

Received Date 11/19/2007

## Additional Informaton

Address 899 Main St.

City Glastonbury

Zip Code 06033

SSN 222-11-3333

▷ **Other Fields**

Documents attached: 4

Application Received Email    Grant Deed    SSN Card    Utility Bill

---

ase Number

eceived Date

askets
eview (0)
y Work (3)
ase Review (4)

---

BAXTER BAY BANK
Online Banking 24 hours a day.

PAGE 1 OF 1

| STATEMENT DATE |
|---|
| 10/20/05 |

MAKE CHECKS PAYABLE TO: BigBucksCard

DIRECT PAYMENT OR INQUIRIES TO: BigBucksCard Center
CUSTOMER SERVICES
P.O BOX 100/BOULDER, CO 99999
PHONE (123) 123-4567

| CREDIT LIMIT |
|---|
| 8000.00 |

A & T PIANO CO
79 S MAIN
LODI, NJ 07644

| CREDIT AVAILABLE | AMOUNT OVER LIMIT |
|---|---|
| 7722 | 0 |

| ACCOUNT NUMBER |
|---|
| 000-000-152 |

$ AMOUNT PAID

PLEASE DETACH AND RETURN THIS TOP PORTION WITH PAYMENT

| PAST DUE | + CURRENT DUE | MINIMUM PAYMENT DUE | PAY EITHER AMOUNT | NEW BALANCE | PAY NEW BALANCE BY THIS DATE TO AVOID ADDITIONAL FINANCE CHARGE | YEAR-TO-DATE FINANCE CHARGE |
|---|---|---|---|---|---|---|
| 25 | 27.79 | 27.79 | | 277.86 | 11/20/05 | 290.82 |

| STATEMENT DATE | 10/20/05 | ACCOUNT NUMBER | 000-000-152 | | ANNUAL PERCENTAGE RATE 21.00 % | | |

| PREVIOUS BALANCE | - PAYMENTS | - CREDITS | + PURCHASES | + CASH ADV. | + FINANCE CHARGE THIS PERIOD DATE | BALANCE SUBJECT TO FINANCE CHARGE AVERAGE DAILY BALANCE | = NEW BALANCE |
|---|---|---|---|---|---|---|---|
| 5111.84 | 2048.62 | 0 | 277.86 | 0 | 7.38 | | 277.86 |

| DATE | TRANSACTION DESCRIPTION | | | REFERENCE NUMBER | PROCESS DATE | AMOUNT |
|---|---|---|---|---|---|---|
| | PAYMENT - THANK YOU | | | 1115859434 11068 | 09/21 | -2048.62 |
| 09/20 | UNITED AIRLINES | DENVER | CO | 970498453 223844 | 09/21 | 27.14 |
| 09/20 | GART BROTHERS | WESTMINSTER | CO | 654921885 139531 | 09/21 | 22.02 |
| 09/20 | K-MART | ARVADA | CO | 223407720 125762 | 09/21 | 24.64 |
| 09/20 | WORLD TRAVEL | LOUISVILLE | KY | 1831868133 13071 | 09/21 | 180.06 |
| 09/20 | TARGET | PETOSKY | MI | 1749423853 56747 | 09/21 | 24.00 |

i    A    Page 1 of 1...

---

start    Address    Go    95%    4:45 P    Wednes

Activity Server    Account Settings    Help

Signed in as **Susan (VP Telesales)**    Sign Out

**Navigation Tree**

Dashboards ▾

- Dashboards
  - All Dashboards
  - Bookmarked Dashboards

Dashboards | GM Customer Support    Edit Dashboard    Save As    Add Bookmark    Tasks 📇    Alerts

**②**

### Cases By Product          Activities

| | % |
|---|---|
| FIN-GL | 2.3 |
| SCM-BI | 37.2 |
| CRM-MKT | 10.5 |
| PT-PT | 21.7 |
| CRM-SU | 9.4 |
| FIN-AP | 18.9 |

### Arrivals By Hour          Activities

250
200
150
100
50
0
8  9  10  11  12  1  2  3  4  5

### SLA Performance          Activities

50
25    75
20
0    100

### Case Arrivals          Activities

600
480
360
240
120
0
CRM  FIN  PT  SCM

### Total Case Arrivals          Activities ▾

0    80    125    200

0    120    200

### Unassigned Cases          Activities ▾
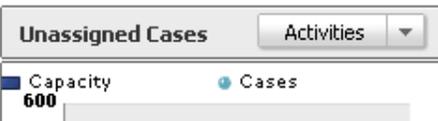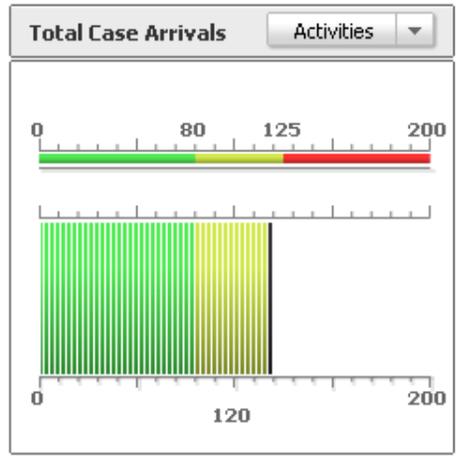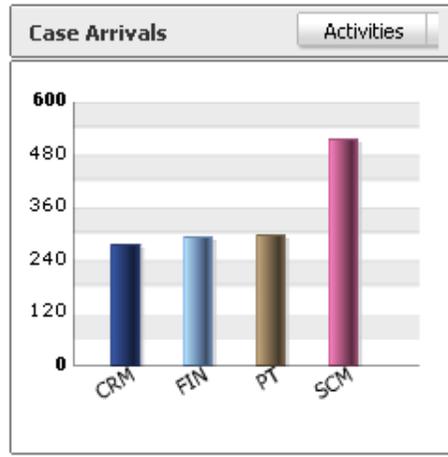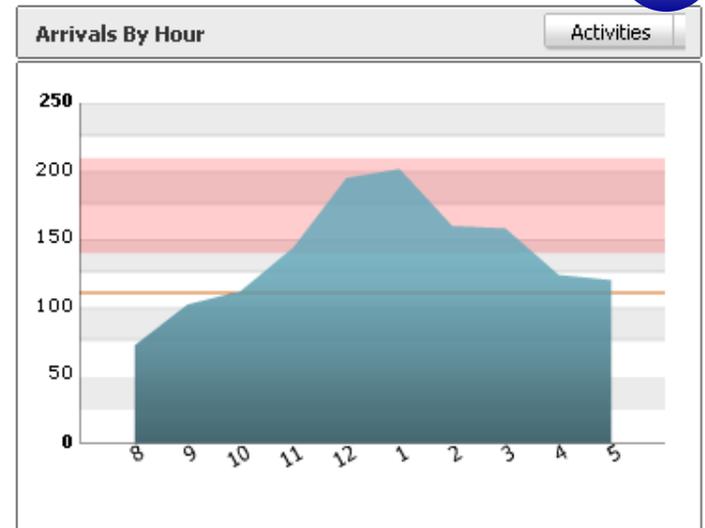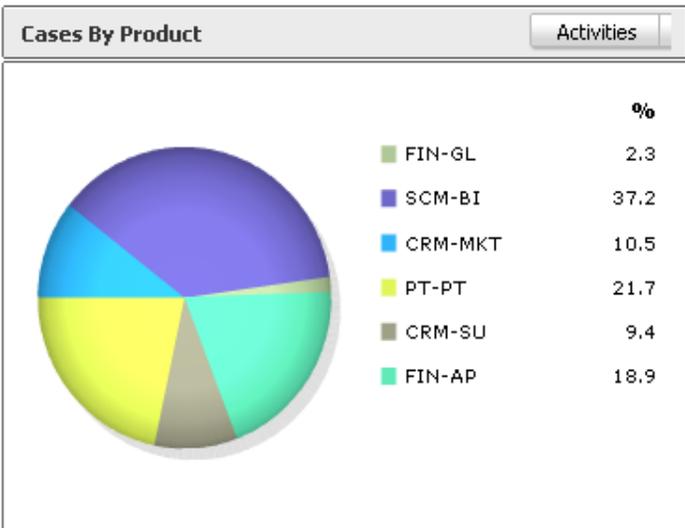
■ Capacity   ● Cases
600

### Unassigned Cases by Region          Activities ▾

| ACTION | CAPACITY | CASES | PERC EXCEED | REGIONNAME |
|---|---|---|---|---|
| Shift D | 400 | 365 | 0.00 | EMEA |

Records Management & Federation

3

Business Process Management

eDiscovery Management & Analysis

Content Collection & Archiving

Content Compliance Lifecycle

ECM Platform

Information Infrastructure
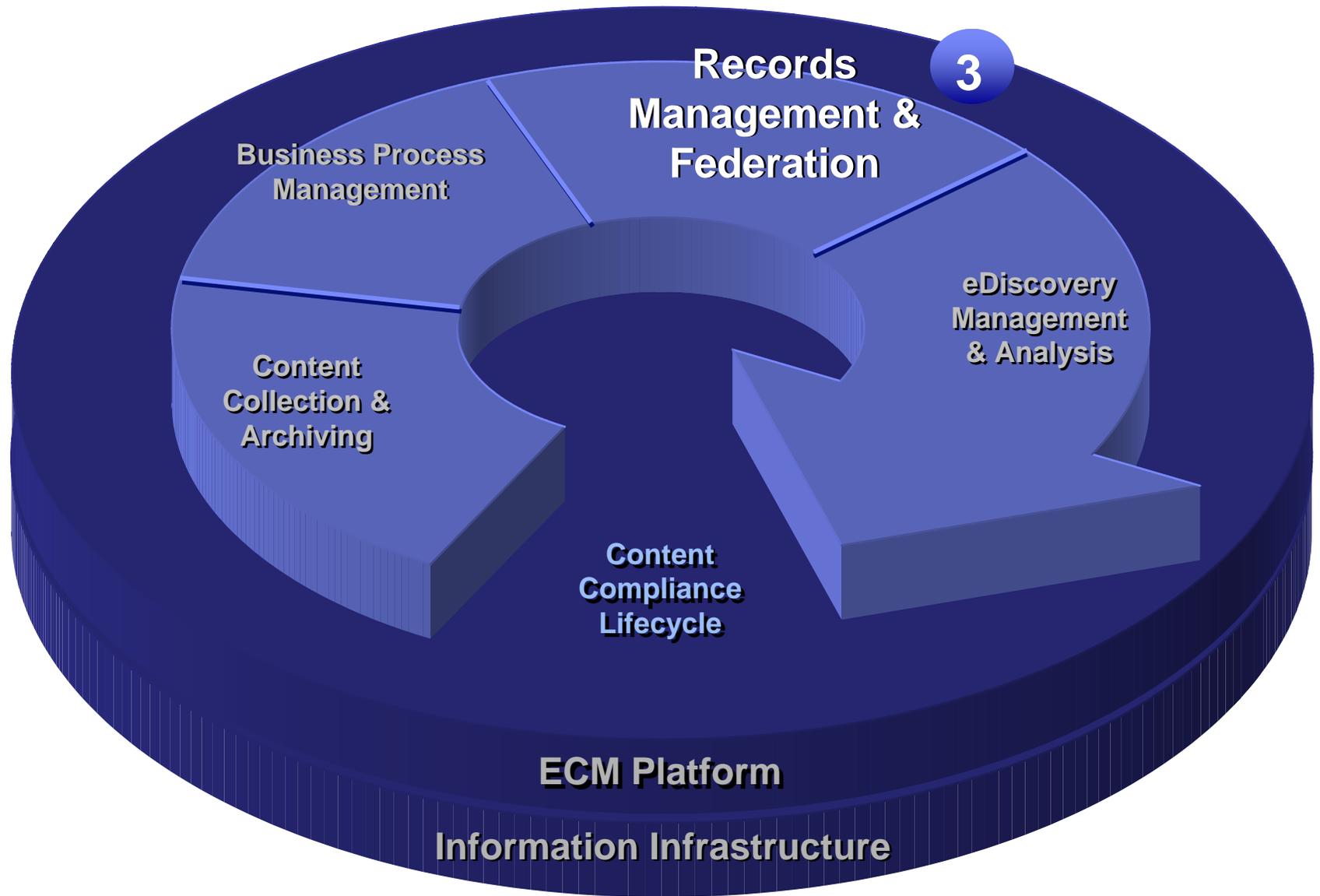
# El mercado del archivado evoluciona en dos lineas

## Soluciones de Archivado Puro

- Fácil de desplegar y mantener
- Reglas de archivado muy simples
- Reglas de retención básicas
- Otro "silo" de información
- Evolución: *Intelligent Content Archiving*

## Soluciones Basadas en ECM

- Plataforma para Intelligent Content Archiving
- Reglas más ricas y compuestas de archivado
- Base para Records Manager: Retención, Disposición, Destrucción
- Integración con Procesos de negocio
- Repositorio unico para toda la plataforma

Muchas organizaciones ya se plantean federar o migrar sus soluciones de archivado a una solución ECM completa.

# IBM Content Collector

Return

## IBM Content Collector v.2.1

**Release Date** Q4 2008

**Theme**

Next generation content collection and archive platform enabling compliance and electronic discovery

**Key Capabilities**
- Unified archiving platform that supports multiple sources and repositories
- Extensive support for source repositories:
  - Exchange/Outlook 2003, 2007; .PST; Lotus Domino/Notes 7.x & 8.x; NTFS
  - Supports development of custom connectors
- Ability to store collected content in IBM Content Manager and FileNet P8 repositories
- Customizable processing of content during collection
- Enables discovery of emails using eDiscovery Manager and eDiscovery Analyzer
- ICC is an upgrade from CommonStore, Email Manager and Records Crawler products

## Key Customer/Partner Benefits

- A scaleable, expandable platform that enable organizations to capture and manage email and file system content for regulatory compliance, electronic discovery, analytics, business processes and space management.
- Email Manager customers gain repository search, off-line user support, and OWA/iNotes features.
- CommonStore customers gain flexible configuration, improved scaleability, new search and OWA/iNotes features.
- Modular architecture can be extended by IBM Business Partners to add custom source repositories and processing capabilities.

**Key Considerations**
- Platform: Windows 2003 & 2008 (32-bit)
- Supports P8 4.0.1 and above and Content Manager 8.3 and above
- GroupWise not supported as a source email system

# IBM FileNet P8 Records Manager

**3**

- Capacidad de gestionar tanto Records físicos como electrónicos

- Automatiza todo el ciclo de vida de gestión de los Records. Para ello utiliza eficazmente los procesos, eventos, reglas… para obligar, de manera transparente al usuario al cumplimiento de las políticas.

- Cuadros de Clasificación Jerárquicos, Declaración, Disposición, Holds, Seguridad…

- Incluye procesos para

  – Proceso de Records físicos

  – Procesos de Disposición

*Report Management*

*Imaging*

*Email Management & Archiving*

*File System Management*

*Document Management*

*Records Management*

*Search & Discovery*

**Prove Compliance**

# Tantas normas, regulaciones…

Privacy Requirements

Geopolitical Specific Regulation

Risk Management

Identity Theft

Data Protection Directive (EU, UK)

**ISO 15489 Records**
**Computer Crime Law**

Electronic Comms Act (BE)

**MoReq (EU)**

Freedom of Information (UK / USA)

ISO 17799 Information Security

DOMEA (DE)

Anti-terrorism Act (UK)

ISO 15801 Legal Admissibility

US DoD 5015.2 STD (US)

ISO 9000 Quality

Basel

BS8600 Complaints (UK)

Operational Risk

Solvency II

/ CMF (FR)

CobiT

Companies Act (UK)

Act (BE)

Sarbanes-Oxley (US)

AML / Handbook (UK)

Cromme / GCCG (DE)

(DE)

ECGI Action Plan (EU)

Preda Code (IT)

7a-4 (US)

Corporate Governance

Industry Specific Regulations

# IBM Content Connector + IBM Classification Module

**Disorganized Content**

Existing P8 Repositories

File Shares

Basic Content Services

e-mail server

**IBM Content Connector**

**IBM FileNet P8 or IBM CM8**

**IBM Classification Module**
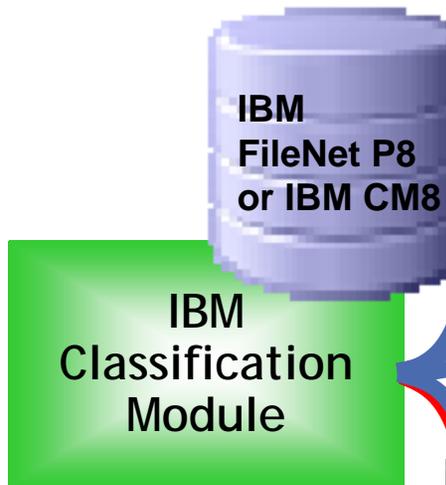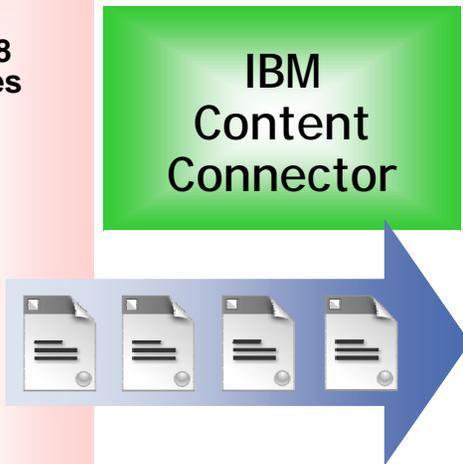
P8-Integrated Review & Audit

Document Class: Marketing

Document Class: Legal

Document Class: Finance

Document Class: Research & Development

**P8 Services**

Records Management
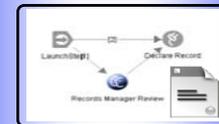
Business Process Management

e-mail/ Content Archiving

Records Management
& Federation

Business Process
Management

eDiscovery **4**
**Management
& Analysis**

Content
Collection &
Archiving

Content
Compliance
Lifecycle

**ECM Platform**

**Information Infrastructure**
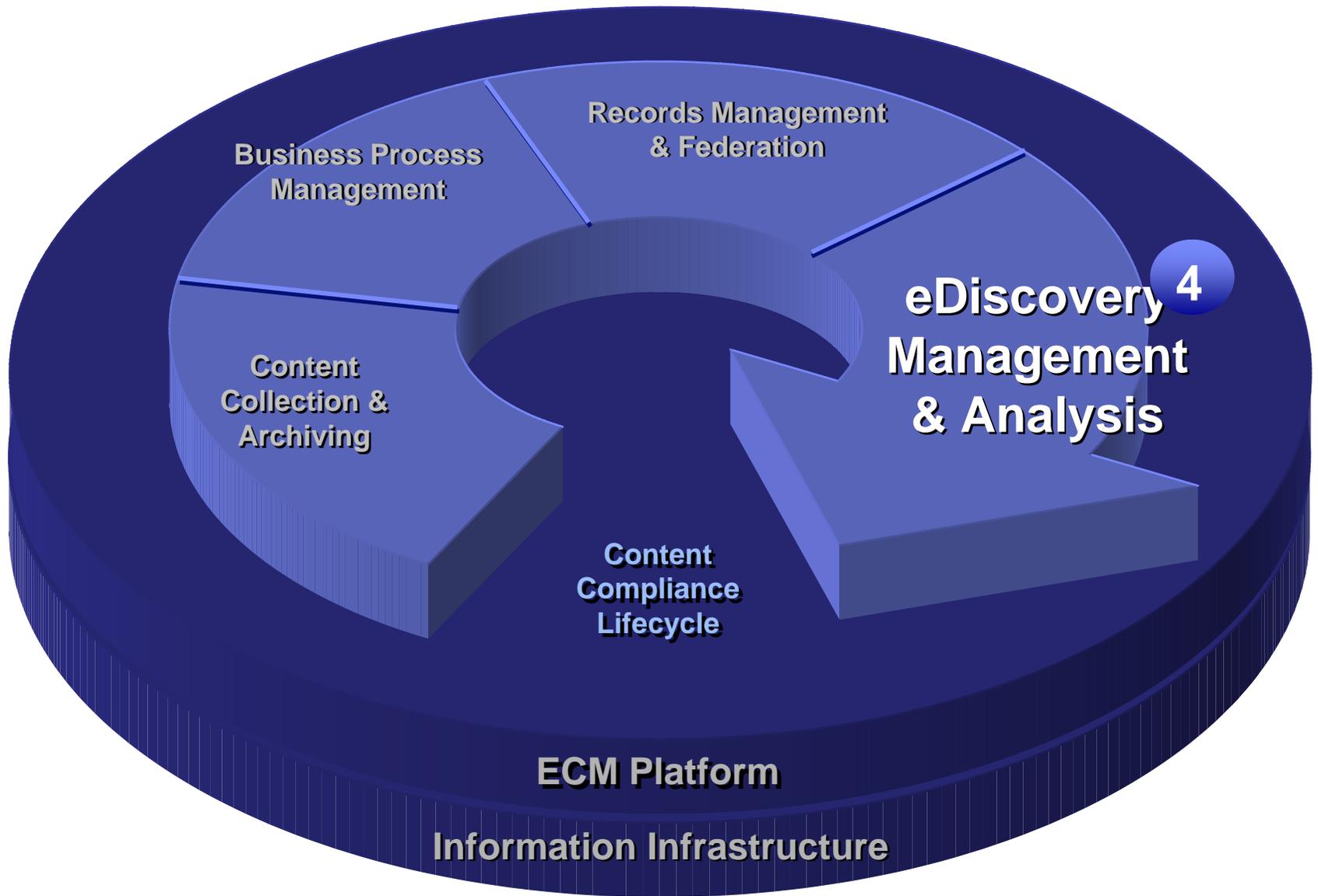
# IBM ECM eDiscovery



**Email**

**Attachments**

**File Shares**

**Desktops**

**SharePoint**

**…**
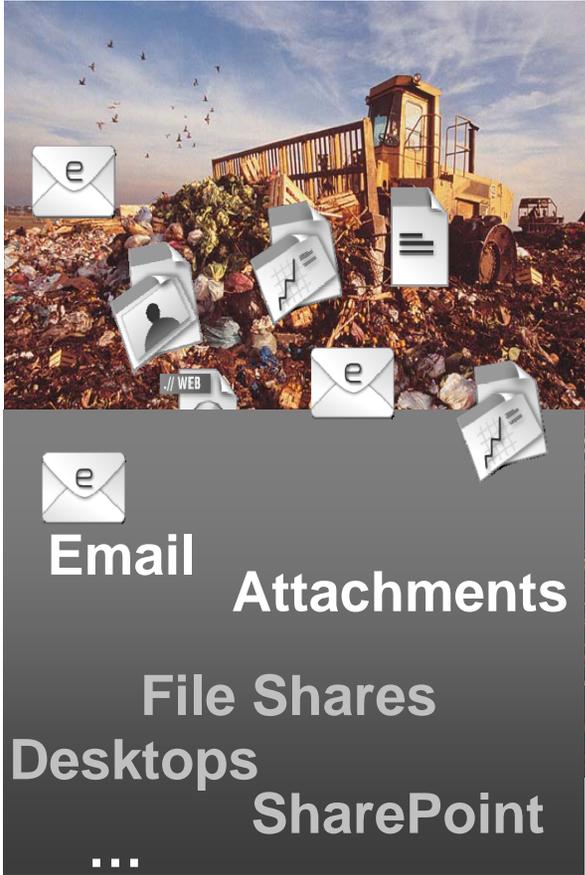
**Productos de Archivado de IBM**

**FileNet P8 and IBM CM**
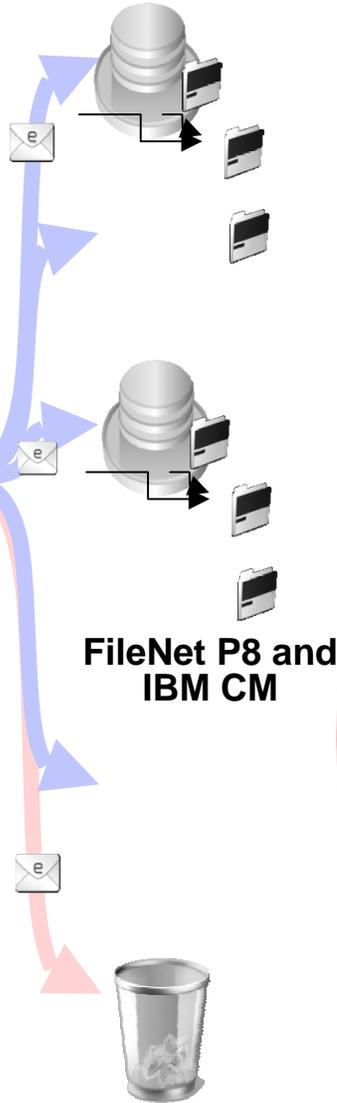
**4**

**Records Manager**

**eDiscovery tools**

**eDiscovery tools**

# IBM ECM Discovery Portfolio

**4**

**Content Classification**
*IBM Classification Module*

*New!*
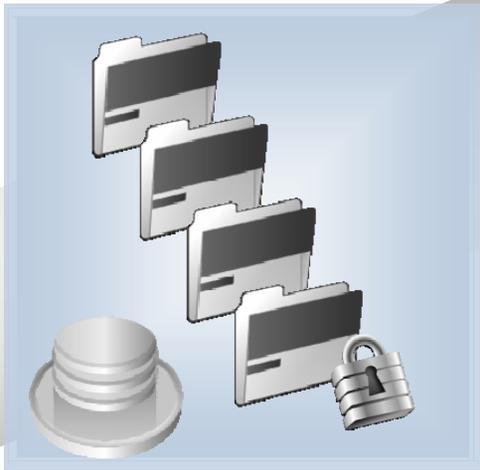
New Visibility & Insight

**Content Access**
*OmniFind Search*

Automate Daily Decisions

**Content Analytics**
*IBM Content Analyzer*

*New!*

**IBM.**

# Los clientes solicitan una única solución para la clasificación, gestión y búsqueda de información

**Desorganizado**
Contenido Empresarial
Procesos Manuales
Almacenamiento

Organizado / Control
Clasificación Automática

**Optimizado**
Registros Legales
Control Operacional
Análisis, BI & Reporting

Plataforma ECM
Todo bajo un único entorno
Versiones, Control, Organización

Colección de Contenidos
Auto-Classificación
Federación de Información
Records Management

eDiscovery Search & Management

eDiscovery Analytics

Aplicaciones Servicios

Warehouse Services

Policy Management

Storage Management

Secure, Audited Vault

Tagging for Discovery & Process Context

Ingest

Enable
Streamline Discovery & Legal Productivity

Business & Legal Users

**IBM Strategy for Enterprise Content Management**

- Records Management & Federation
- Business Process Management
- eDiscovery Management & Analysis
- Content Collection & Archiving
- Content & Process & Compliance Lifecycle
- ECM Platform
- Information Infrastructure
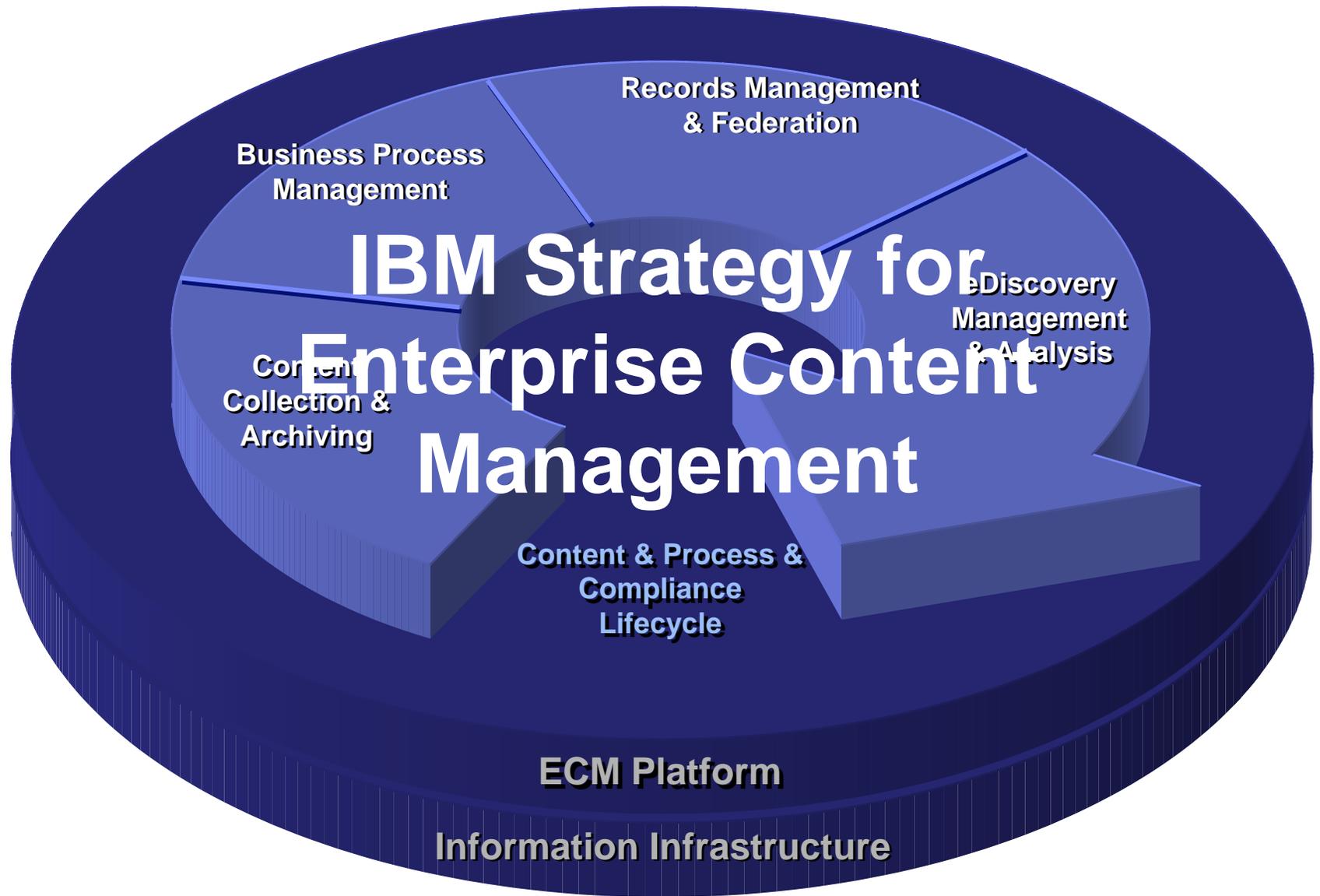
# IBM ECM Product Strategy & Vision

**1**

## Content Anywhere
Manage content anywhere without requiring content migration

**2**

## Active Content
Deliver information that is unified, accurate and in context with critical business processes and policies

**3**

## Enterprise Compliance
Manage risk and automate compliance with records management, intelligent content archiving, and legal discovery

**4**

## Business Agility
Provide the right information to the right constituents at the right time in the right context to enable better decisions faster

**5**

## Pervasive
Provide the ability for all enterprise users to access content, collaborate, and make business decisions using their familiar tools

# IBM ECM

**Clients**

| Portals & Web Apps | LOB & ISV Solutions | Desktop Apps |
| Web Components | App Components | Desktop Plug-Ins |

**Services**

| Search & Discovery | Content Centric BPM | Collaboration |

| Content Services | Capture | Classification & Taxonomy | Records Management |
| Document Management | Image Management | Archive Management |
| Web Content Management | Forms Management | Report Management |

Federation/Integration

**Repositories**

IBM CM     IBM Domino     IBM FileNet     SharePoint     Other

# ¡Gracias!

**Javier Grandío Garaicoechea**
**Responsable Técnico IBM ECM SPIGIT**