

IBM SolutionsConnect 2013

L'IBM TechSoftware nouvelle génération

28, 29 et 30 août
IBM Client Center Paris



#solconnect13

Transformez vos opportunités en succès



Enterprise Content Management Overview and Roadmap

Feri Clayton,
Director, Imaging and Capture Solutions



Leading organizations rely on IBM ECM

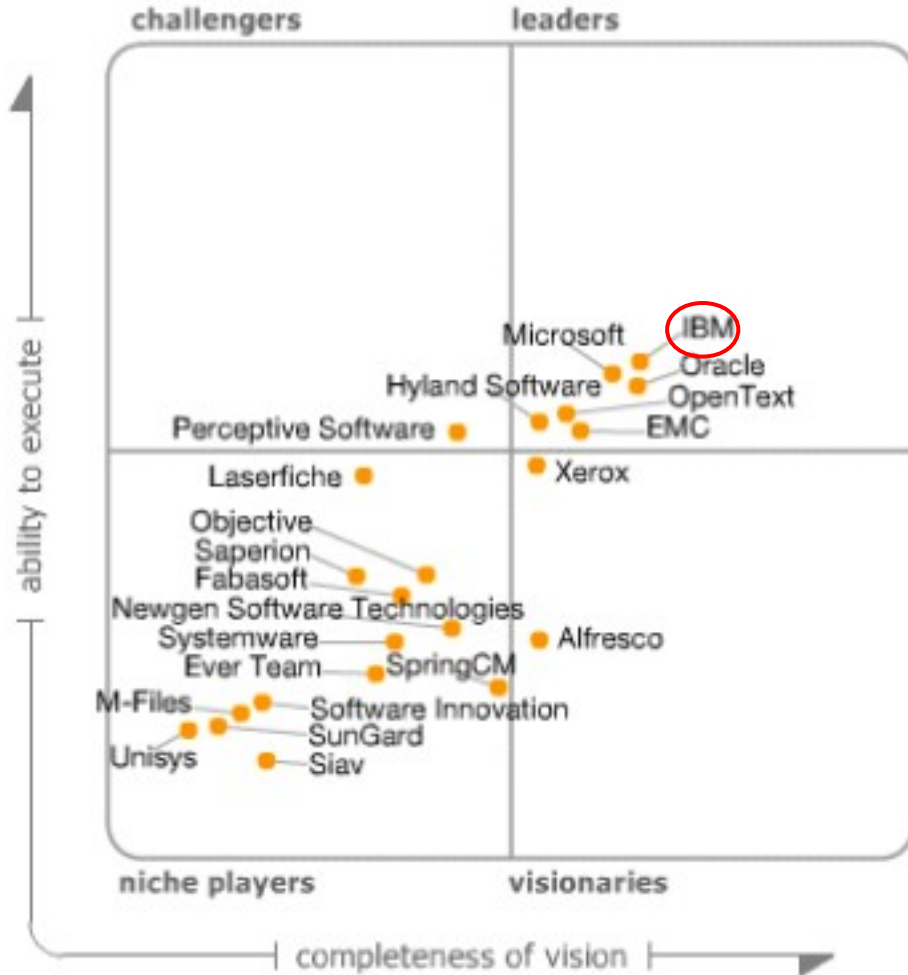


- 24 out of the top 30 *banks* worldwide*
- 15 out of the top 16 *telecommunications* companies worldwide*
- 19 out of the top 23 *insurance* companies worldwide*
- 56 of the top 58 *government* agencies*
- 21 out of the top 27 *retail* companies worldwide*
- 1200+ *manufacturers* worldwide*

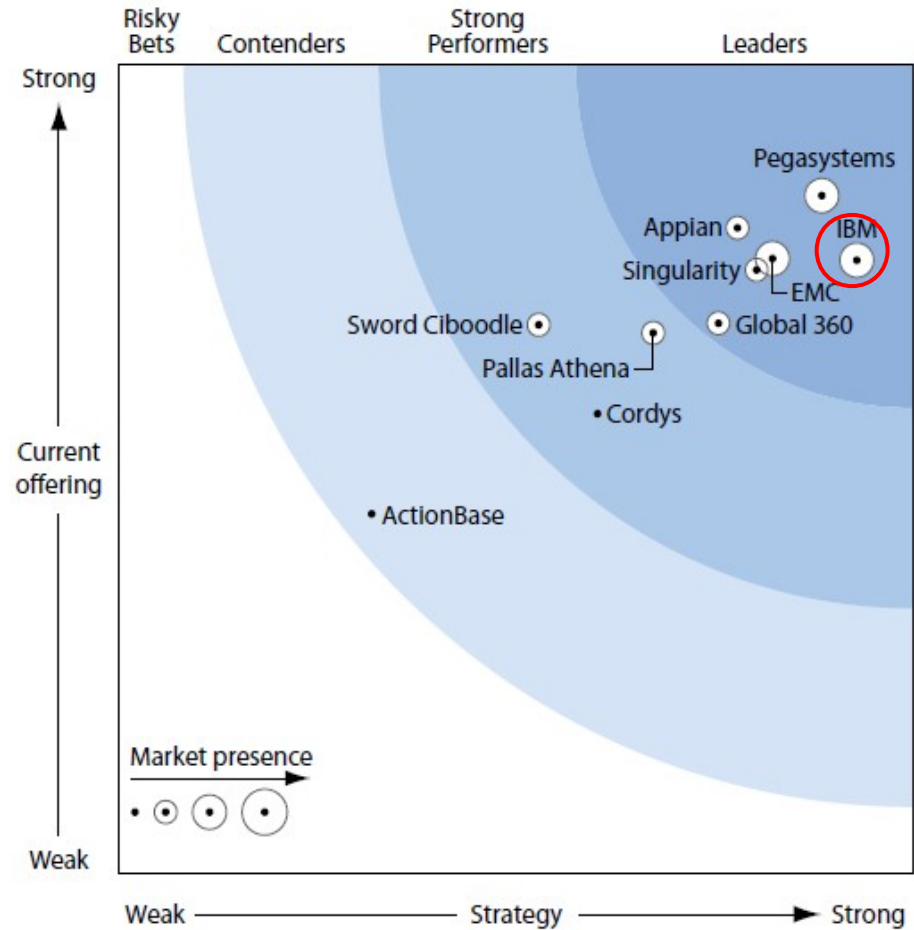
* Lists of top companies/agencies sourced from Dun & Bradstreet Worldbase. ECM customer information sourced from IBM Finance.

IBM ECM Leadership

ECM



Case Management



High Value Solutions built on best-of-breed capabilities

CAPTURE



and gain control of the content to determine the value

Capture

- Document capture automation
- Production imaging
- Enterprise report management
- Platform standardization and consolidation

ACTIVATE



and put the content in context

Activate

- Comprehensive case management
- Integrated collaboration and rules
- Case analytics
- Document centric workflow

SOCIALIZE



for better collaboration and access

Socialize

- Office document management
- Social content and collaboration

ANALYZE



and identify patterns to gain insights

Analyze

- Content analytics and assessment
- Enterprise search
- Content classification and tagging
- Master content

GOVERN



for reduced cost and risk

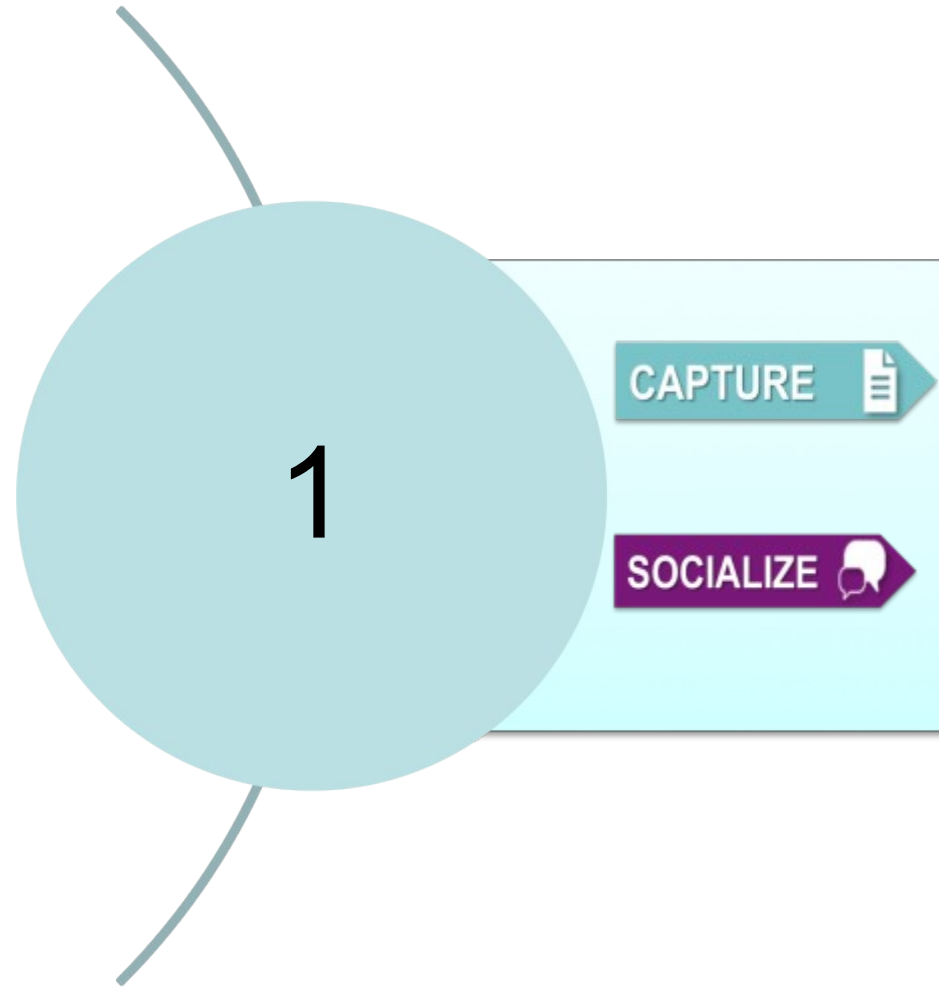
Govern

- Smart archive
- Records and retention management
- eDiscovery
- Disposition and governance



CONTENT

Essentials



Key Business Drivers

Capture and Imaging solutions

Automating the life cycle of paper-based documents from capture to business process to archive.. reduced costs and faster cycle times

eBilling and Enterprise Report Management

Using digital archive and statement presentment for cost savings & improved customer service

Smarter Workforce – Social Content Solutions

Improving workforce effectiveness by adding social capabilities to content-related processes. Managing and governing social content for reduced cost and risk.

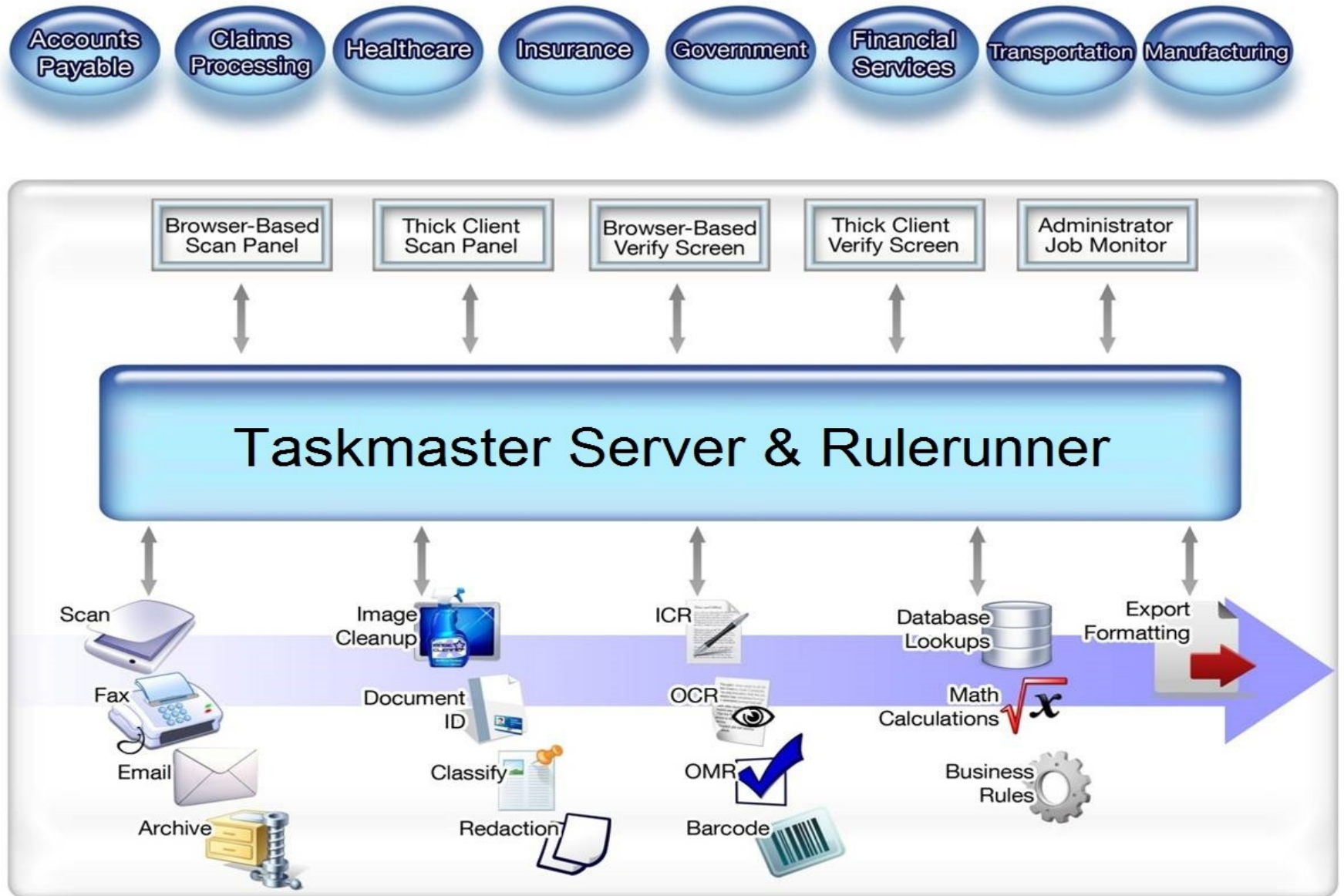
ECM Consolidation / Standardization

Establishing a common platform for enterprise content management services. Consolidating vendors and establishing shared services to save cost and improve enterprise infrastructure capabilities



Datacap: 23 Years of Innovation in Document Capture

Robust, Flexible, Scalable Architecture



Solutions: Accounts Payable, HR Files, Contracts

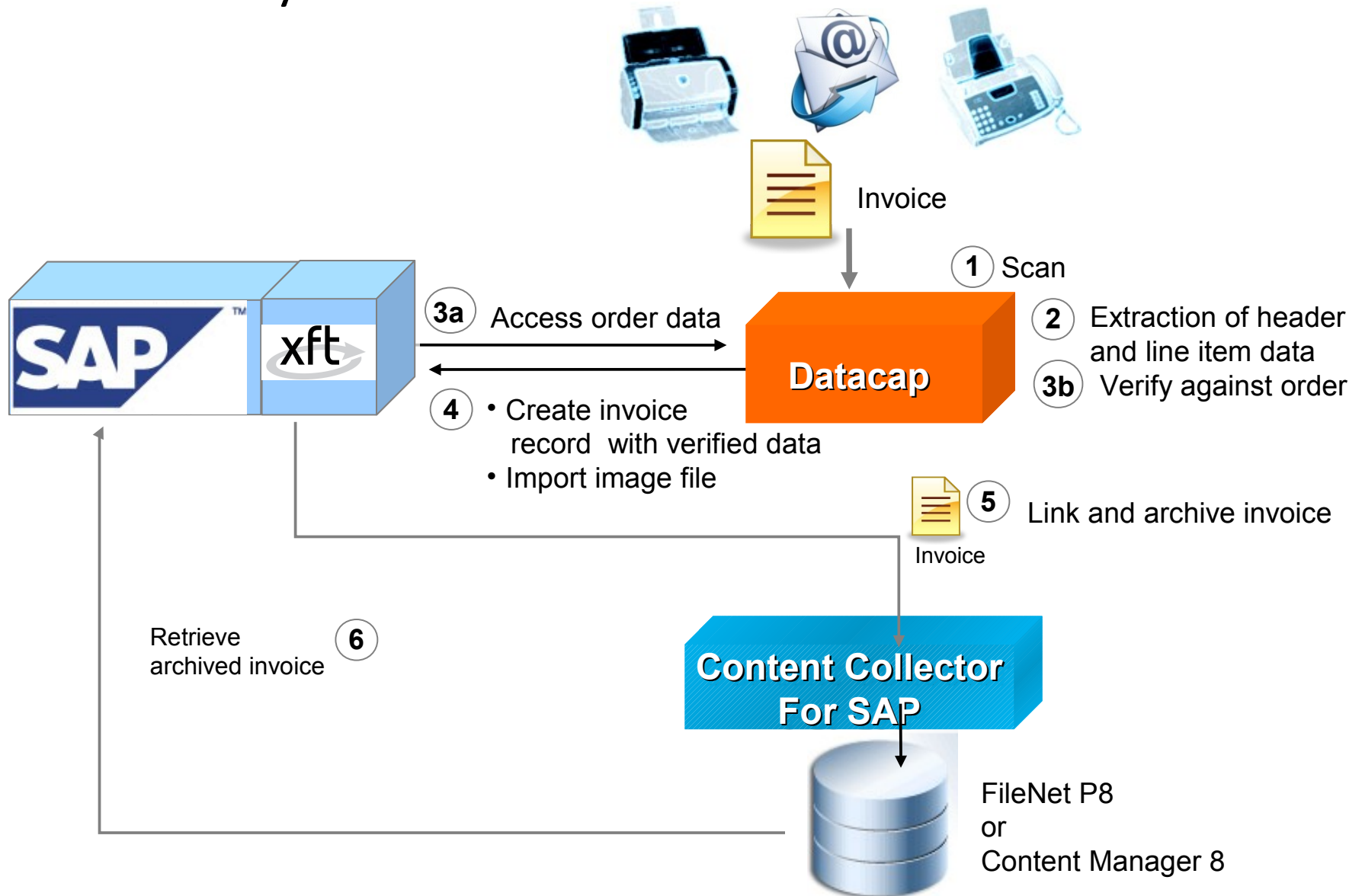
Providing best of breed IBM ECM capture and imaging solutions for SAP users



In collaboration with partner



Accounts Payable

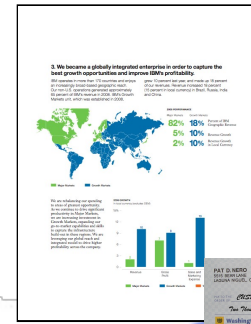


Content Manager OnDemand

Clear market leader in Enterprise Report Management

- Archive high-volumes of computer generated print data
- Automatically capture, index and deliver reports, statements and other computer-generated output
- Enable electronic bill presentment on the web
- Store print streams in their native format without the need to transform them during archiving
- Highly optimized storage mgmt and very high retrieval performance

ITEM	QTY	DESCRIPTION	ORDER NUMBER	SHIP DATE	UNIT PRICE	AMOUNT
01	1	CLASSICAL MUSIC CD/DVD/MP3	586017	10/06/99		
MONTHLY SHIPPING REPORT						
FROM 10/01/99 TO 10/31/99						
CUSTOMER: Betty's Music Store						
Marceline Plaza						
200 Lower Macarthur						
Cedar Falls, IA 50613						
ACCOUNT NUMBER: 11897						
CONTACT: Betty Toke						
02	4	Bach, J.S.: Sonatas for Solo Violin	MS42822	8.99	35.96	
03	7	Beethoven, Franz: Mass in C, K.427	420811-2	9.00	63.00	
04	2	Somerset, Elizabeth C: Music	CD 611	10.19	20.38	
05	9	Scarlatini, Domenico: Music	SET 48282	6.99	62.91	
ORDER NUMBER: 586020 SHIP DATE: 10/11/99						
06	11	Beethoven, Johannes: Symphonies, Nos. 1-9	430252-2	5.99	65.89	
07	8	Mendelssohn, Felix: March of the Titans	SHS 4752	8.99	71.92	
08	10	Pisetti, Maria di Aquino	CHM 5964	9.59	95.90	
ORDER NUMBER: 586029 SHIP DATE: 10/11/99						
09	6	Blow, J.: Modern Violin Solo Repertoire	AXX 591097	10.99	64.74	
10	6	Beethoven, An: American in Paris	ACB 8024	5.99	35.94	





Business Challenge

at&t wanted to extend electronic Bill Presentment and Payment (eBPP) services to its small business customers via the Web to improve customer service, ease of statement review, and to lower operating costs.

Solution

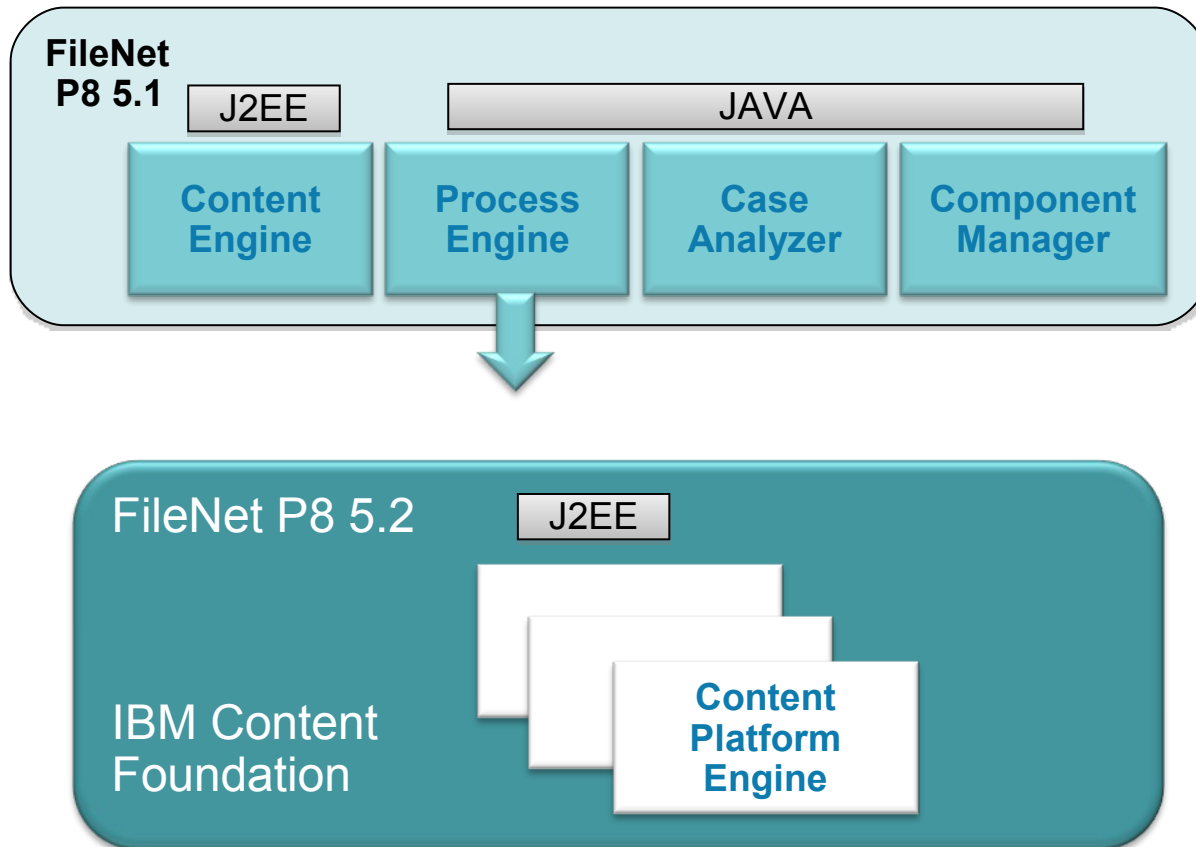
Using OnDemand as the software solution for e-bill presentment.

Smarter Business Outcomes

- Storage for 6.3 Billion invoices and other billing data
- Adding 80 Million statements per month
- 30,000 CSRs and 100,000 external users – branch & kiosk access

FileNet Content Manager... Single J2EE Engine

- Combined all core services into a single J2EE engine deployment
- Consistent HA and DR for all
- Share resources such as database connection pools

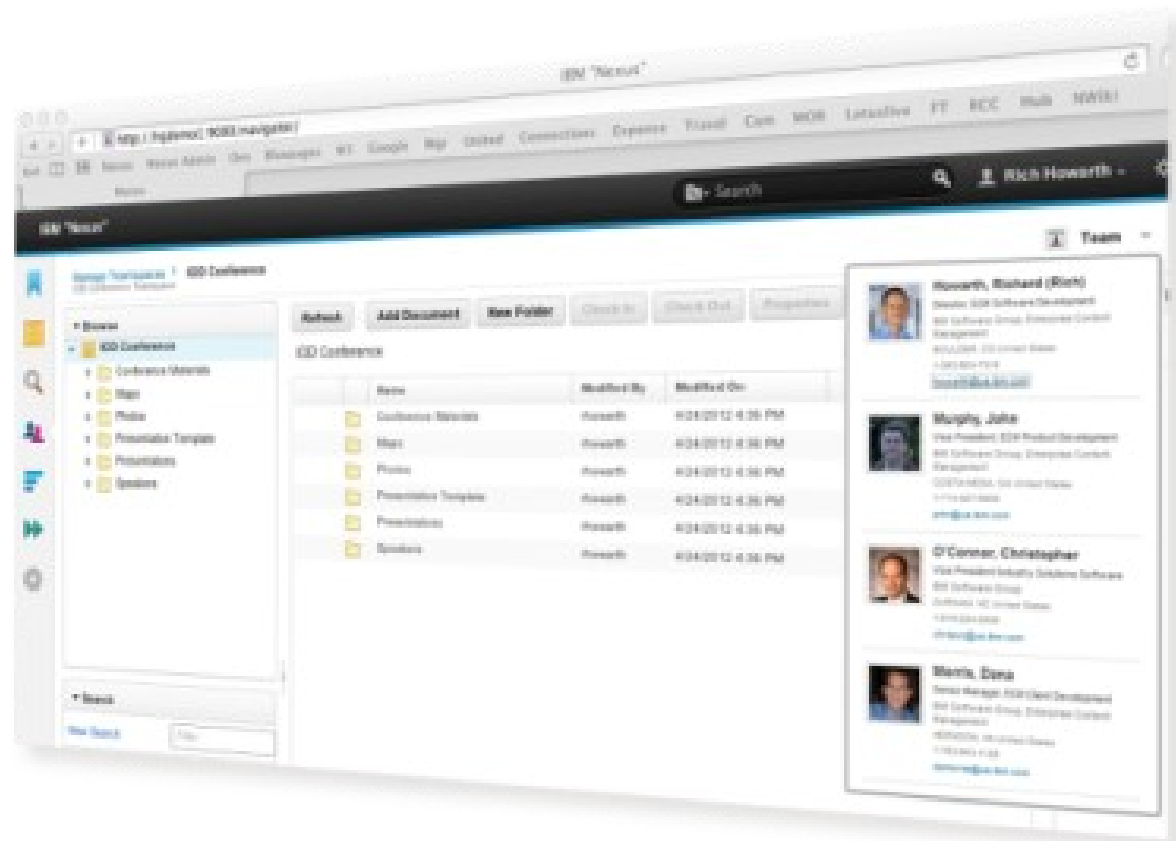


Benefits:

- ✓ Very significant improvements in ease of administration and deployment
- ✓ Simplified upgrades and patches
- ✓ Higher performance

Content Navigator

- User interface for all of IBM ECM and
- UI Framework for building ECM solutions



IBM Content Navigator - ECM User Experience

A collaborative and mobile content experience

■ Access to documents anywhere

- FileNet Content Manager
- IBM Content Manager
- OnDemand
- CMIS
- ICA text search



■ Desktop and mobile

- Browser application
- Office integration
- iOS mobile application

■ Benefits

- Business user access to all documents
- Common navigation and terminology regardless of source and workstation environment



Focus Corp Finance

Refresh

Add Document

New Folder







Check In

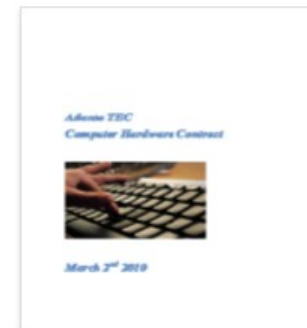
Check Out

Properties

Actions

Focus Corp Finance > Customer Contracts > Account 25-13652

	Name	Size	Modified By	Modified On
	Reference material		P8Admin	2/7/2012 4:09 PM
	Atlanta TEC - Updated Contract	473 KB	rhowarth	10/20/2011 12:50 PM
	Atlanta TEC Capital Lease Contract.pdf	71 KB	rhowarth	10/19/2011 3:20 PM
	Atlanta TEC Computer Hardware Contract.pdf	473 KB	rhowarth	10/19/2011 3:20 PM
	Atlanta TEC Invoice.doc	58 KB	rhowarth	10/19/2011 3:21 PM
	Atlanta TEC Midwest Lease Agreement.pdf	67 KB	rhowarth	10/19/2011 3:21 PM
	Atlanta TEC.ppt	1.1 MB	rhowarth	10/19/2011 3:21 PM



Properties

Class:	Contract
Document Title:	Atlanta TEC - Updated Contract
Authoring Division:	Sales
Type of Document:	Long Term Contract
Review Status:	Ready for review
Target Agreement Date:	10/4/2011 11:00 PM
Agreement Date:	10/18/2011 11:00 PM
Governing Law:	Arkansas
Law Firm:	Butler McCabe & Ruger
Parties:	Atlanta TEC
Sectors:	Computer Hardware

System Properties

Focus Corp Finance

Customer Contracts

Account 15-18173

Account 25-13652

Reference material

Account 35-17232

Account 55-23523

Account 65-37433

Emails

Invoices

Processes

Reference material

Photos

Presentations

Templates

Valuations

Working

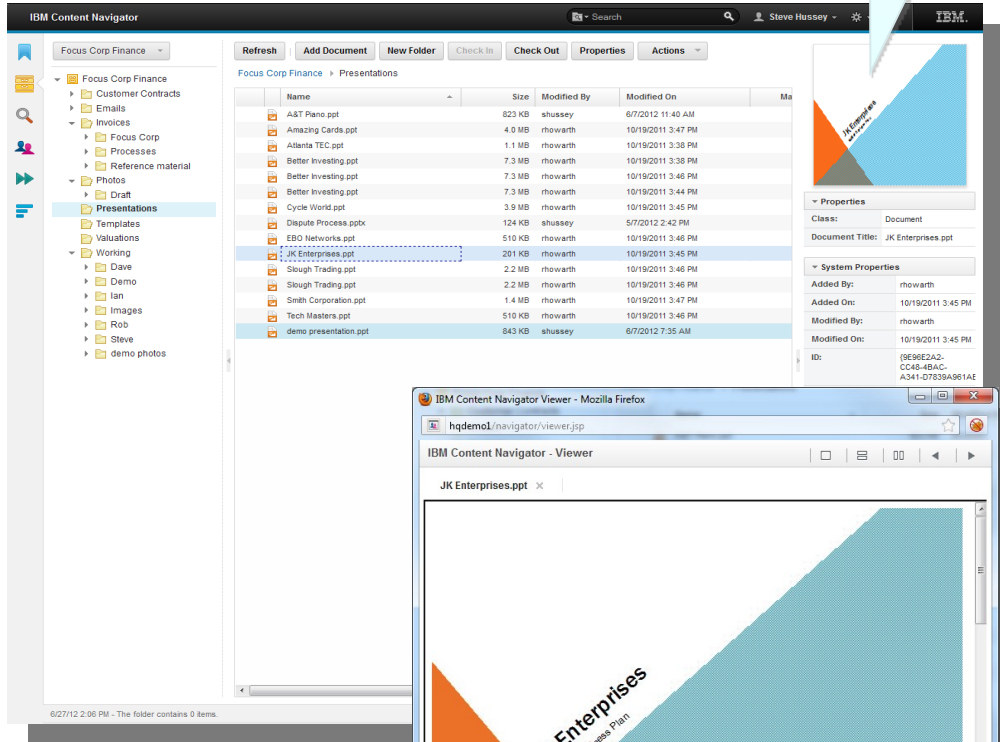
Images

Misc

Collaborative content management

- Document authoring
- Folder organization
- Property and text search
- Checkin/out
- Classification and taxonomy
- Flexible security
- Review/approve
- Thumbnail, preview, print, download as ...
- External Data integration

Thumbnail
S



Office
Document
Preview

Business self provisioning



My Documents replacement

Quarterly and annual business reviews

Events and conferences

Standard operating procedures

Contracts/
vendor management

...

IBM "Nexus" Search Rich Howarth

Manage Teamspace IOD Conference

Refresh Add Document New Folder Check In Check Out Properties

IOD Conference

Name	Modified By	Modified On
Conference Materials	howarth	4/24/2012 4:36 PM
Maps	howarth	4/24/2012 4:36 PM
Photos	howarth	4/24/2012 4:36 PM
Presentation Template	howarth	4/24/2012 4:36 PM
Presentations	howarth	4/24/2012 4:36 PM
Speakers	howarth	4/24/2012 4:36 PM

Team Modify Teamspace

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Morris, Dana
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danorris@us.ibm.com

Information
item is selected.

4/26/12 10:45 AM - The folder contains 6 items.



Teamspace



Navigator visual component toolkit

Focus Corp Finance > Customer Contracts > Account 25-13652

	Name	Last Modifier	Date Last Modified	Majo
Folder icon	Reference material	P8Admin	10/9/2011 11:23 PM	
PDF icon	Atlanta TEC Capital Lease Contract.pdf	rhowarth	10/19/2011 3:20 PM	
PDF icon	Atlanta TEC Computer Hardware Contract.pdf	rhowarth	10/19/2011 3:20 PM	
Word icon	Atlanta TEC Invoice.doc	rhowarth	10/19/2011 3:21 PM	
PDF icon	Atlanta TEC Midwest Lease Agreement.pdf	rhowarth	10/19/2011 3:21 PM	
PPT icon	Atlanta TEC.ppt	rhowarth	10/19/2011 3:21 PM	

▼ Document Information

Properties

Folder Name: Reference material

System Properties

Added By: Richardson, Bill

Added On: 10/9/2011 8:51 PM

ID: {7546B284-1743-4400-A145-E4671A496D44}

Path Name: /Customer Contracts/Account 25-13652/Reference material

▼ Browse

- Focus Corp Finance
 - Customer Contracts
 - Account 15-18173
 - Account 25-13652**
 - Account 35-17232
 - Account 55-23523
 - Account 65-37433
 - Invoices
 - Reference material
 - Presentations

- Change or extend Content Navigator
- Build complete applications
- ECM-enable applications in any framework
- Use ECM Dijits, full Dojo library, other JavaScript packages to build your solutions

▼ Work

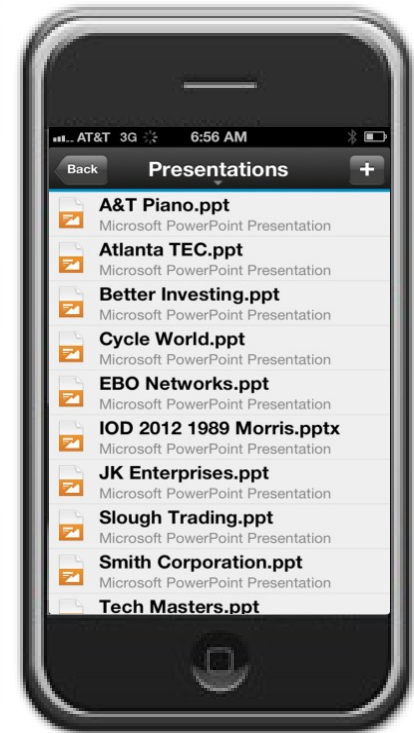
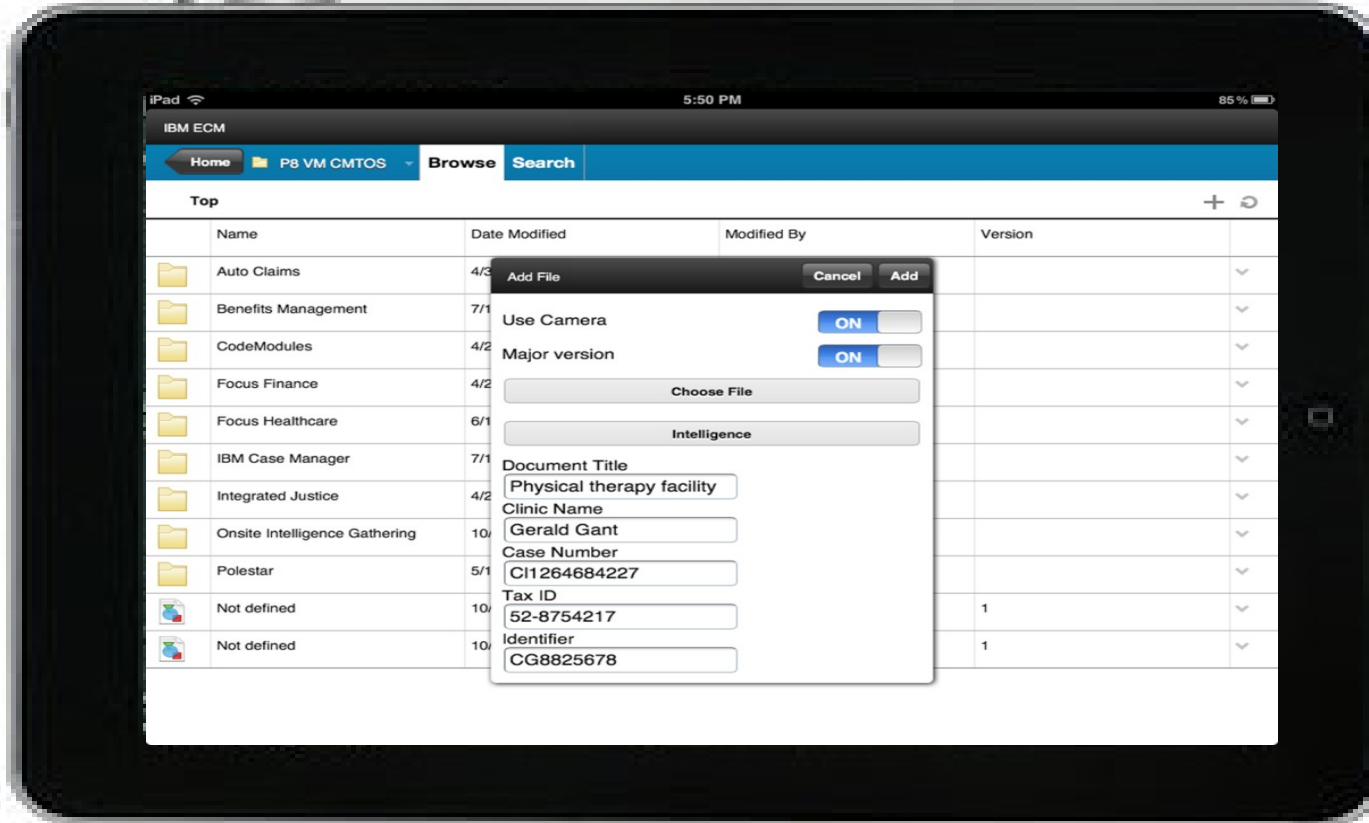
- Contract Manager
 - My Personal Work
 - Contracts ready for approval
- Contract Reviewer
 - Contracts for review



<http://dojotoolkit.org/>



Mobile solutions matching business needs



IBM Content Navigator for iOS
Browse, Search, View, Add from
camera, Send to / from other apps,
Datacap capture processing, Case

Reusable components for
client & partner solutions

Content Navigator Supports Enterprise Search

- Type-ahead
- Synonyms
- Term/"hit" highlighting
- Thumbnails
- Navigation/facet search
- Cross-repository search
- Search documents, multiple repositories and other sources
- Repository actions (check-out, send-to, favorite, ...)

The screenshot displays the IBM 'Nexus' search interface. The top navigation bar includes the IBM logo, user name 'Rich Howarth', and search options like 'Advanced Search', 'Preferences', and 'My Profile'. The search query 'Atlanta' is entered in the top search bar. On the left, a 'Facet Tree' shows categories like Author, Authoring Division, Branch Office, Effective Date, Presentation Status, Presentation Type, Presenter, Segment, Target Agreement Date, Type of Document, and date. Below it, a 'Dynamic Facet Chart' shows a bar chart for the 'Author' facet with values for PAdmin, istory, Rich Howarth, rhowarth, shussey, and rclar. The main search results area shows three document entries, each with a thumbnail, a title, a date, and a detailed description. The first result is titled 'Atlanta TEC Computer Hardware Contract March 2 nd 2010 EBO NETWORKS NON - BINDING FRANCHISE AGREEMENT Dated ...' and the second is 'Untitled' dated March 1, 2012. The bottom of the interface shows 'Results 1-14 of 14' and 'Results per page: 25'.

Content Navigator V2.0.2

✓ Socializing around content

- Track who is downloading documents
- Comment on and discuss documents
- Tagging, Liking

✓ Productivity

- Teamspace document review and approvals
- Cross repository search
- Multi document updates in a single action
- Office: IBM Content Manager support
- Mobile: eMail a document, create searches, ...

✓ Enhanced self provisioning and deployment

- Navigator configuration export/import
- Teamspace template export/import



Focus Corp Finance > Customer Contracts > Account 25-13652

Name	Last Modifier	Date L
Reference material	P8Admin	10/9/2
Allanta TEC Capital Lease Contract.pdf	rhowarth	10/19/
Allanta TEC Computer Hardware Contract.pdf	rhowarth	10/19/
Allanta TEC Invoice.doc	rhowarth	10/19/
Allanta TEC Midwest Lease Agreement.pdf	rhowarth	10/19/
Allanta TEC.ppt	rhowarth	10/19/

▼ Document Information

Properties

Folder Name: Reference material

System Properties

Added By: Richardson, Bill

Added On: 10/9/2011 8:51 PM

ID: {7546B284-1743-4400-A145-E4671A496D44}

Path Name: /Customer Contracts/Account 25-13652/Reference material

▼ Browse

Focus Corp Finance

- Customer Contracts
 - Account 15-1817
 - Account 25-136
 - Account 35-1723
 - Account 55-2357
 - Account 65-3743
- Invoices
- Reference material
- Presentations

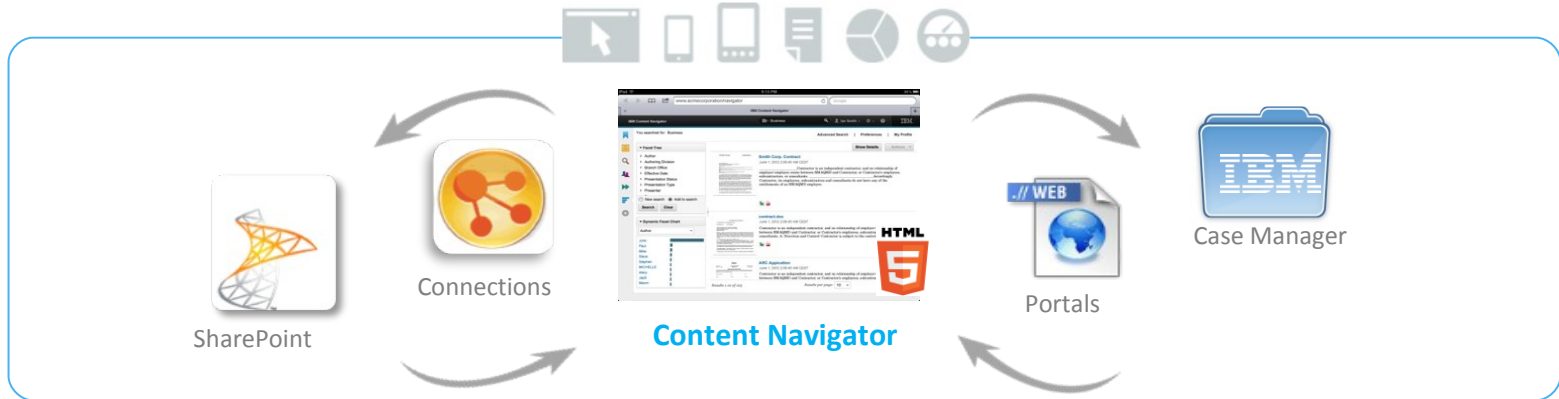
▼ Work

- Contract Manager
 - My Personal Work
 - Contracts ready for approval
- Contract Reviewer
 - Contracts for review

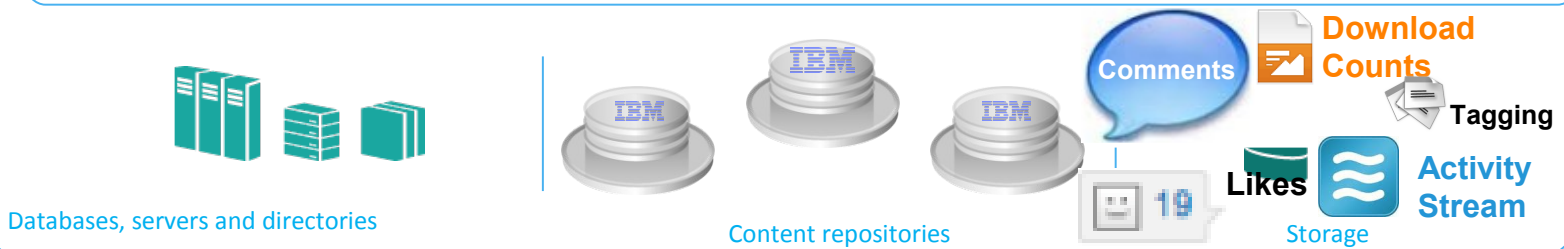
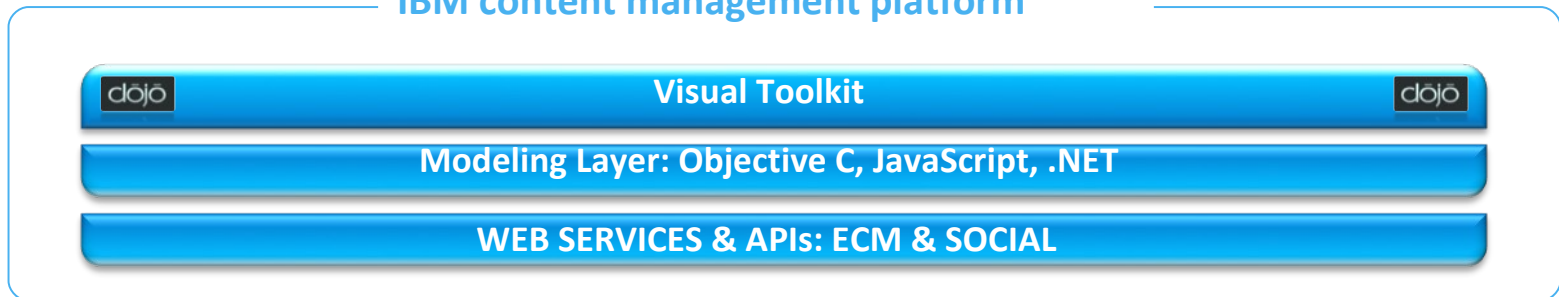


Smarter Content for IBM's Social Business solutions

Content experiences: desktop, web & mobile



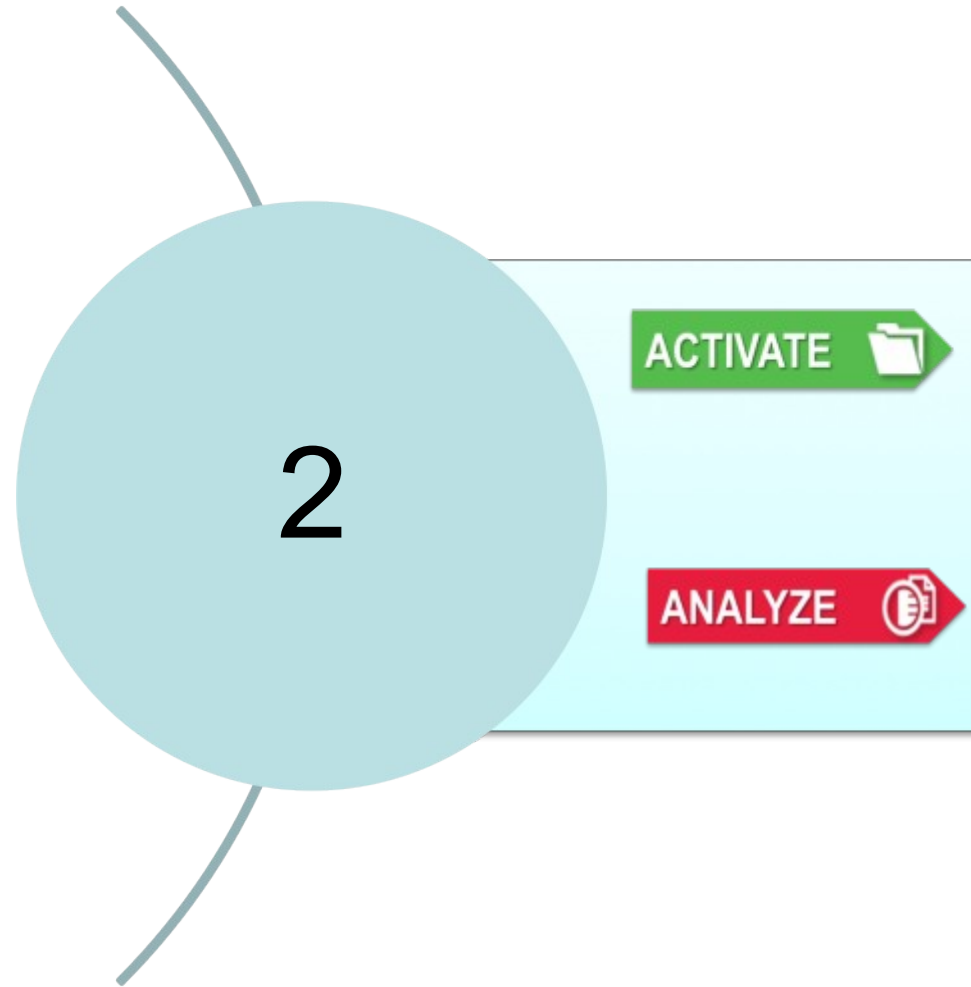
IBM content management platform





HIGH VALUE

SOLUTIONS



Key Business Drivers

Addressing Content-related Processes / Case Management workloads

Leveraging deeply integrated content and process technologies to reduce cycle time, save costs and deliver optimized case outcomes.

Gleaning Insight from Business Content

Employing advanced text analytics and discovery technologies to extract meaning and valuable business insights – e.g. voice of the customer, product and service innovation, warranty service and fraud detection.

Using Pre-built Software Solutions to rapidly address Business Challenges

Pre-integrated solutions that address horizontal and industry-specific business needs. Improved time-to-solution and reduced integration costs help satisfy line-of-business buyers while supporting IT standards and enterprise platform requirements.



IBM Advanced Case Management

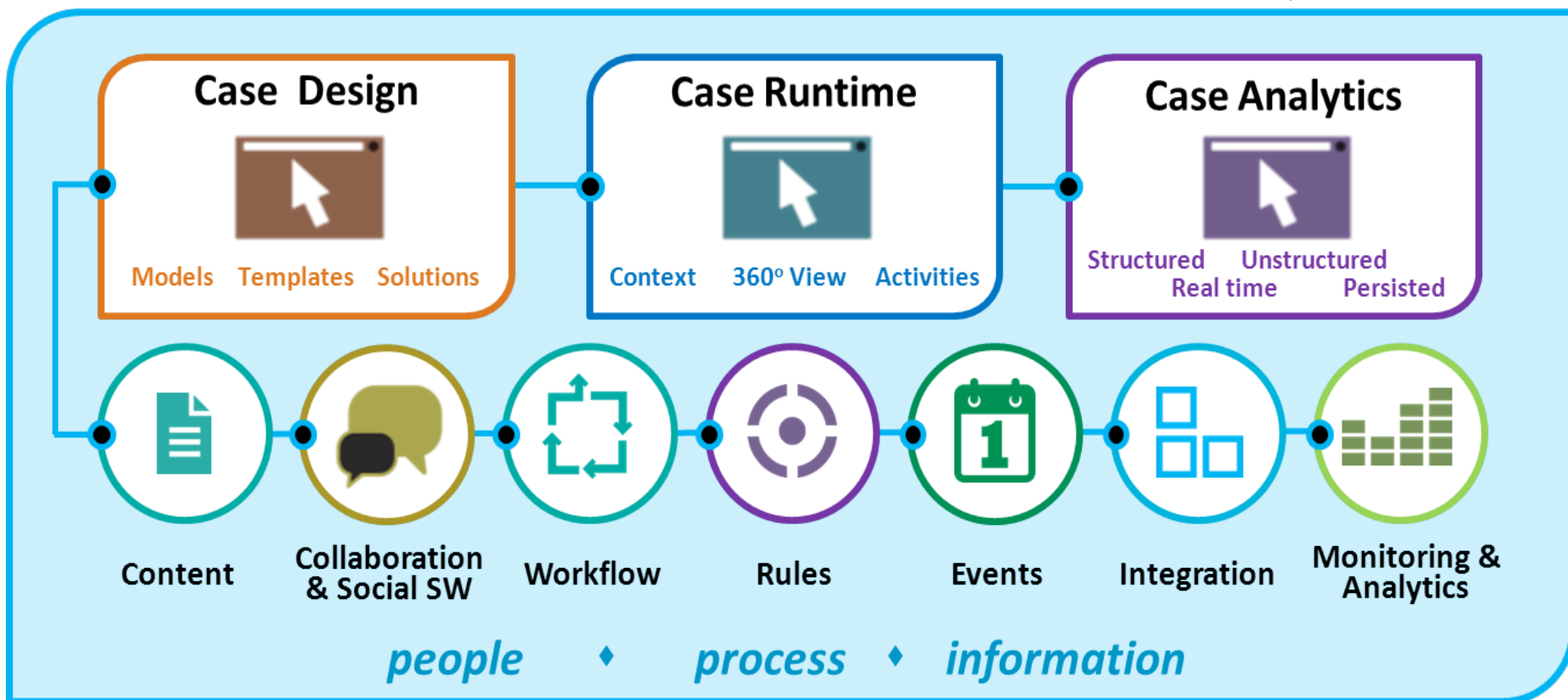
Brings people, process and information together ... in context of a case



- Delivers **optimized case outcomes**
- Supports **dynamic**, runtime work management
- Delivers **trusted information** to the case – structured or unstructured
- Manages and governs **entire case lifecycle**
- Provides the line-of-business and IT with tools to **rapidly deliver** case-based solutions

IBM Case Manager

Simplifying the delivery of case-based solutions



Typical Case Management Use Cases

Banking



- Commercial / consumer lending
- New account origination
- Online brokerage account administration
- Investor servicing
- Mortgage processing
- Asset record certification and deficiency resolution

Energy and utilities



- Engineering project management
- Rate case submission management
- Pre-construction project management
- Emergency permit requests and processing
- Critical safety compliance management

Government



- Administrative and trial court management
- Budgeting and planning
- Licensing
- Child support payment collections
- Citation management
- Fraud investigation
- Grant management
- Retirement administration

Healthcare



- Credentialing
- Electronic health record integration
- Patient financial services
- Release of information
- Health information management
- Patient records billing
- Medical records management
- Patient records management

Insurance



- Claims processing
- Customer care
- New product development
- Policy management
- Complaints and appeals
- Healthcare enrollment
- New business
- Underwriting
- Wholesale insurance management

Chemicals & petroleum



- Asset management
- Plant lifecycle management
- Engineering project management
- Document lifecycle control
- Critical safety compliance management
- CAD drawing management
- Workplace safety management

Retail



- Product Information
- Automated invoice processing
- Single view of customer
- Supplier management
- Records Management
- Contracts management
- Customer service

Telecom--munications



- Subscriber contracts
- MNP
- E-billing
- Voice of Customer Analysis
- Confirmation letters
- Customer service
- Regulatory compliance
- New product introduction

IBM Case Manager V5.2 - 3Q 2013



Enhanced UI Toolkit



Case Visualizer



User Defined Ad-hoc Task Creation



Collaborative Solution Design



Built-in Rules



Content Navigator based document dialogs and capabilities



Case Operations



Built-in Page and Data Layout Designer



Enhanced Step Editor



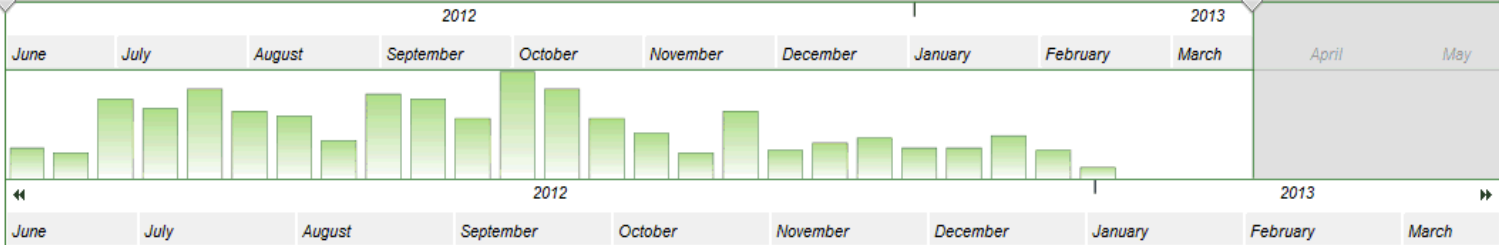
Mobile Client Access



Simplified Install and Deployment

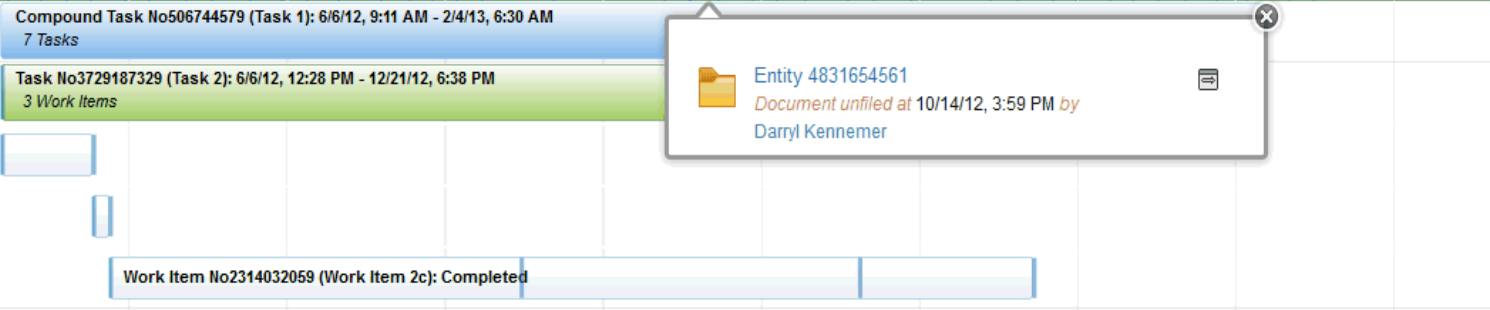


WAS 8 Support
WebLogic Support



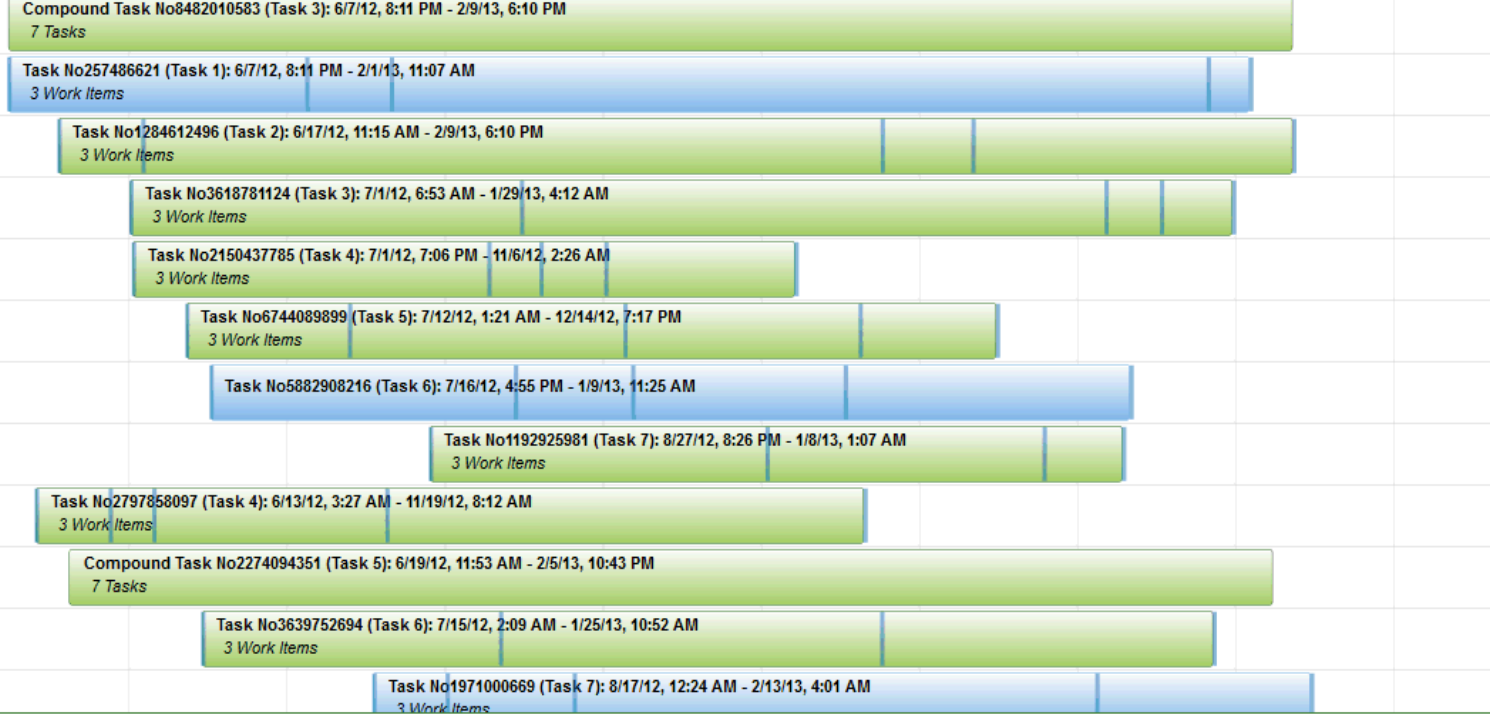
Case No4105936806
Created: 6/5/12, 2:38 PM

- Compound Task No506744579
Initiated
- Task No3729187329
Completed: Lance Mangual
- Work Item No8009197554
Completed: Julio Vey
- Work Item No7786282962
Completed: Darryl Kennemer
- Work Item No2314032059
Completed: Genna Mcnelly



Entity 4831654561
Document unfiled at 10/14/12, 3:59 PM by
Darryl Kennemer

- Compound Task No8482010583
Completed
- Task No257486621
Initiated: Nelson Moir
- Task No1284612496
Completed: Lance Mangual
- Task No3618781124
Completed: Nelson Moir
- Task No2150437785
Completed: Lance Mangual
- Task No6744089899
Completed: Julio Vey
- Task No5882908216
Initiated: Lance Mangual
- Task No1192925981
Completed: Jayna Allscheid
- Task No2797858097
Completed: Mathew Poutre
- Compound Task No2274094351
Completed
- Task No3639752694
Completed: Darryl Kennemer
- Task No1971000669

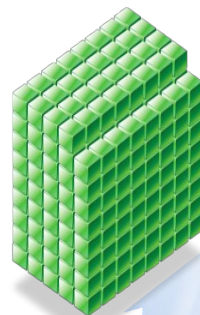


Information is exploding!

... And Organizations Need Deeper Insights

44x

as much Data and Content
Over Coming Decade



2020

35 zettabytes

80%

Of world's data
is unstructured



Velocity
Variety
Volume

2009

800,000

petabytes

IDC Digital Universe, 2010



During this presentation ~ 500 terabytes
of new information will be created !!

IBM Content Analytics

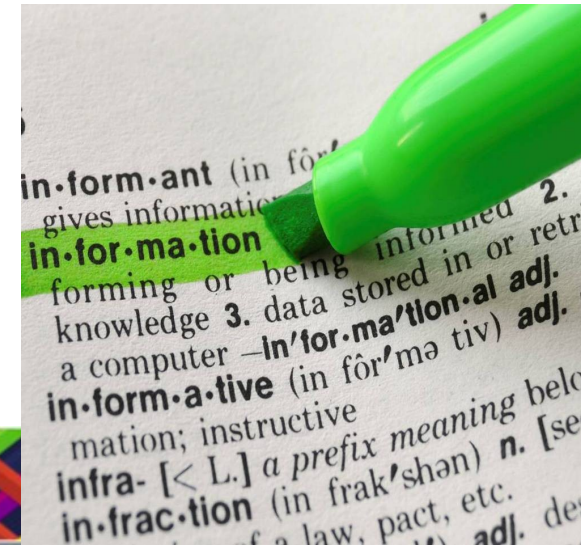
Analyzing unstructured content is no longer optional

Watson uses IBM Content Analytics for Natural Language Processing functions



Key Capabilities:

- ✓ Secure scalable enterprise search
- ✓ High-performance faceted navigation
- ✓ Automatic extraction of meaningful concepts and entities from text
- ✓ Open, standard UIMA-based text analysis pipeline
- ✓ Multiple graphical views of the facets (dimensions) of content
- ✓ Automatic highlighting of interesting anomalies and correlations in the data
- ✓ Support for analysis of over **30 content sources** and over **150 content formats**, and **15 languages**



IBM Content Analytics 3.0

- Unified search and analytics
- Big Data analytics
- Sentiment analytics
- Contextual View
- Usability improvements
- Enterprise Connectivity improvements
- Content Analytics Studio enhancements
- Improved result ranking controls
- ...and more

The collage shows several key features of IBM Content Analytics 3.0:

- Documents:** A screenshot of a document viewer showing a scanned document with a search overlay.
- Facets:** A screenshot of a facet navigation panel showing a list of keywords and their frequencies.
- Time Series:** A screenshot of a time series chart showing data trends over time.
- Deviations / Trends:** A screenshot of a deviation chart showing data points relative to a trend line.
- Connections:** A screenshot of a network graph showing relationships between entities.
- Facet Pairs:** A screenshot of a facet pair analysis showing relationships between two facets.
- Enterprise Search:** A screenshot of a search results page with a dynamic facet chart.
- Dashboard:** A screenshot of a dashboard with multiple charts and filters.

ECM Technology at Work ...

IBM Intelligent Investigation Manager

... a new solution **powered by ECM and i2**, provides deeper insights for fraud discovery and optimizes the process of fraud investigations.



Fraud costs private and public sector enterprises hundreds of billions in revenues each year \$ 994 Billion in US alone

- Association of Certified Fraud Examiners

BANKING

*There was a 25% rise in the fraudulent use of UK credit and debit cards last year (2007), with losses amounting to **£535m**...*

ENERGY & UTILITIES

*Customers have stolen power for decades, costing utilities 1% to 3% of revenue — or about **\$6 billion** industry-wide*

TAXATION

*Approximate estimates say that the EU loses **€100 billion** annually in value added tax (VAT) revenues to fraud.*



HEALTHCARE

*Estimates place the loss due to health care fraud at a staggering **\$226 billion** each year.*

INSURANCE

*Latest national estimate for claims fraud in the U.S. is **\$79 billion**.*

WARRANTIES

*Upwards of **10% to 15% of claims** are in some way suspect*

WORKER'S COMPENSATION

***25 percent** of all workers compensation claims are fraudulent.*

TRAVEL

The average expense reimbursement fraud scheme costs a company \$60,000, lasting on average two years before detection.

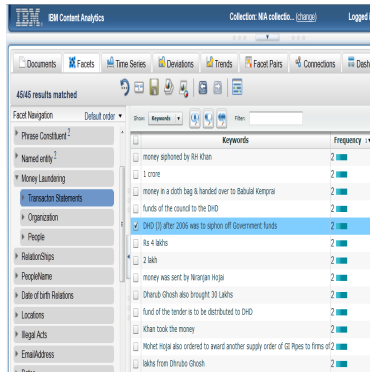
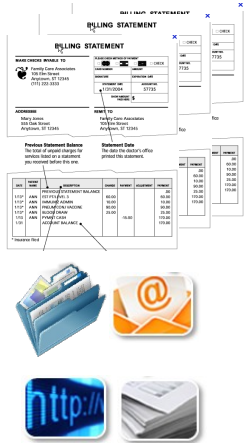


Example: Detection and Investigation of P&C Claims Fraud

Content Analytics

Raw Data:
Claims, Case history
billing statements,
Correspondence,
Content in social media

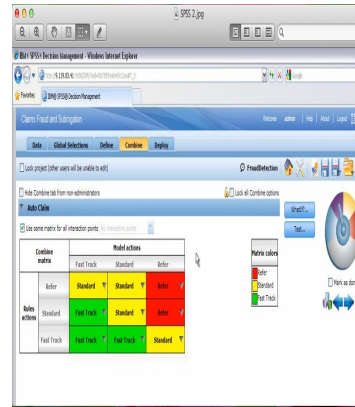
Crawls new claims, case histories, and other content. Extracts entities and adds them to the data repository.



Predictive Analytics

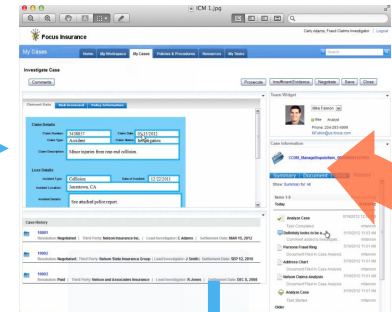
Risk of 85%
fraud

"If more than 3 claims in 6 months and over a certain \$ amount, flag as high risk."



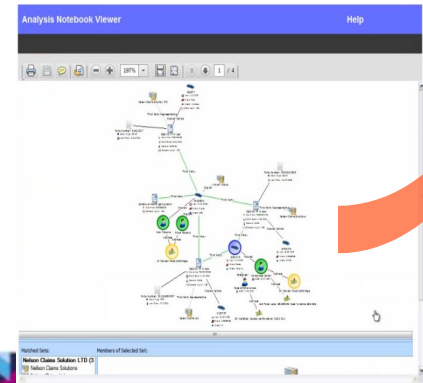
Case Management

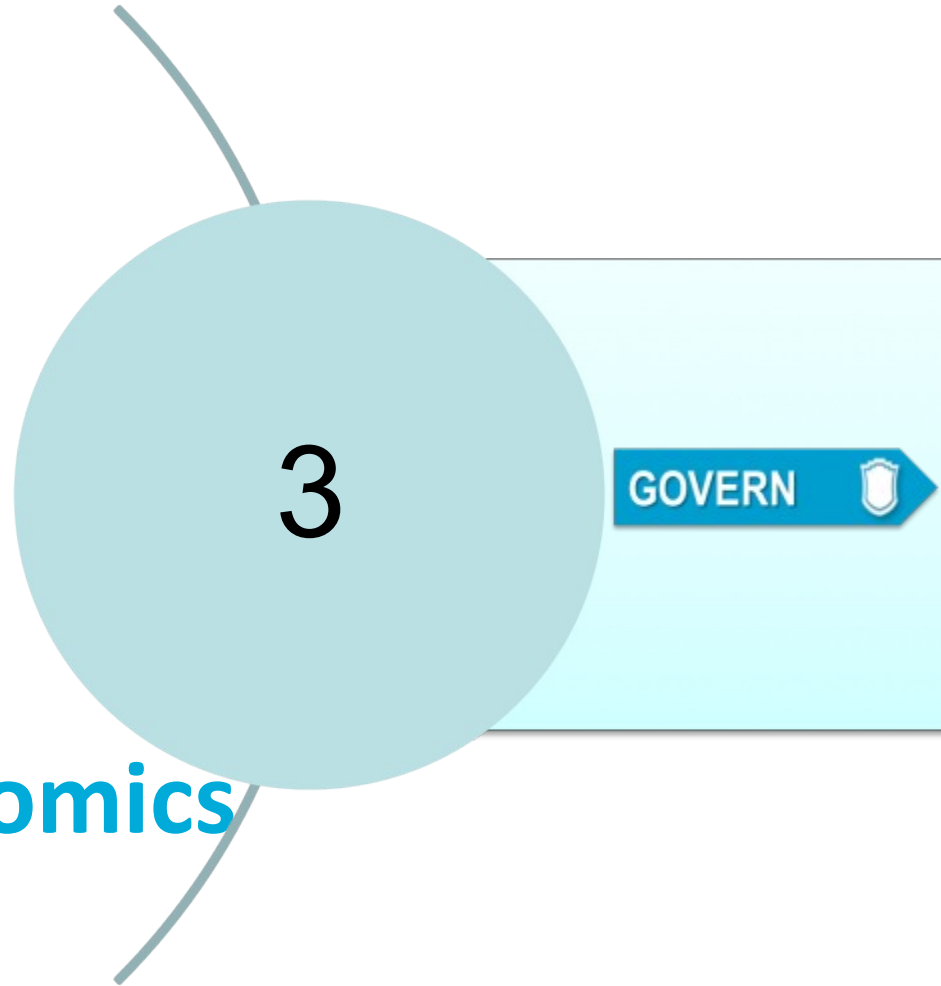
Case populated with all claim info. Supervisor triages the claim & creates work item for forensic analysis



Intelligent Investigation

Analyst detects relationships





Information economics

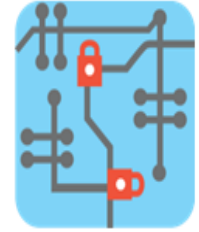
IBM Information Lifecycle Governance

The ILG solution portfolio enables customers to:

- ✓ Effectively retain and archive information
- ✓ Efficiently meet eDiscovery obligations
- ✓ Manage test data more efficiently
- ✓ Improve data quality
- ✓ Defensibly dispose of information to lower both cost and risk.

Smart Archive for IT

- Archive Office and Collaboration Content
- Archive SAP and Structured Data



eDiscovery Management for Legal

- eDiscovery Process Management
- Case Assessment & Analytics



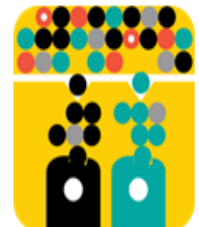
Records & Retention Management for RIM

- Retention Policy & Schedule Management
- Enterprise Records Management



Disposal & Governance Management for the CIO

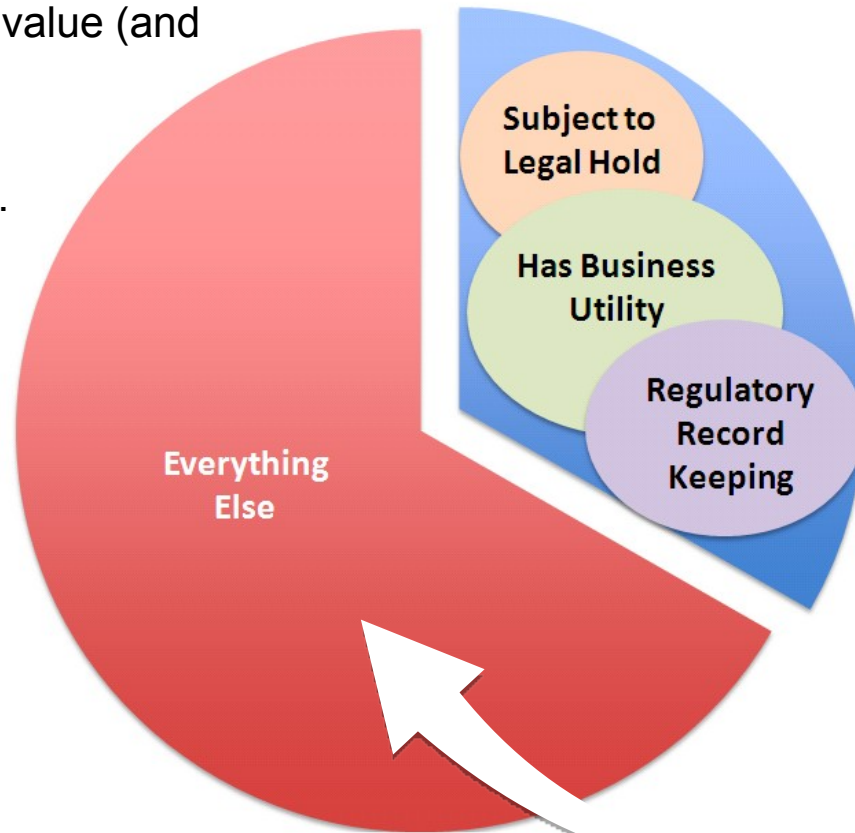
- Disposal Enablement
- Governance & Risk Management



Content **Doesn't** Have Indefinite Value

Over Retaining = Over Spending

If you know what you need to keep for litigation and regulation
And you know what you need to keep for its business value (and for how long)
Then you can throw everything else away.

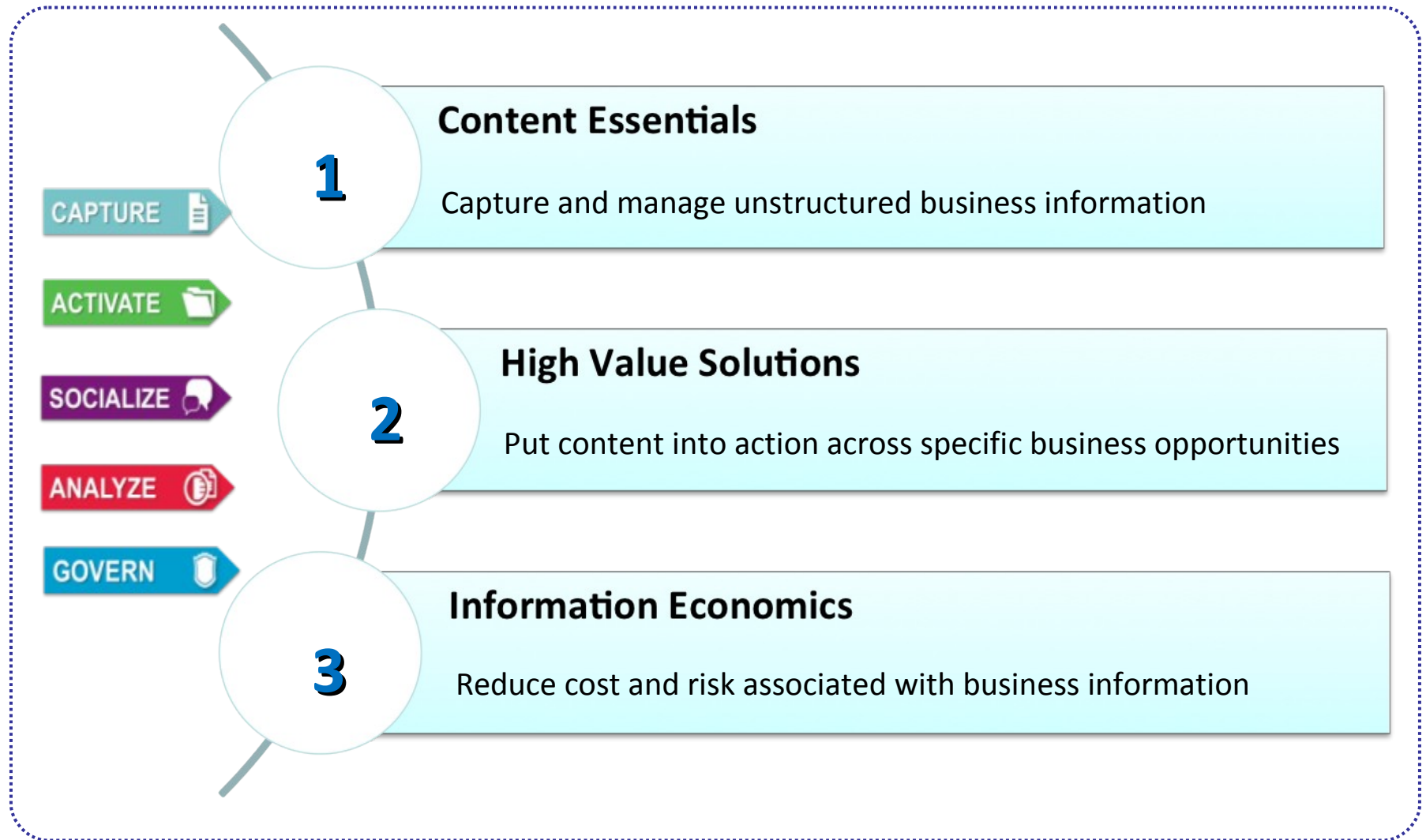


If you can't link business value and legal obligations to information assets, you:

- *Hope you're in compliance*
- *Spend too much to manage unnecessary data*
- *Spend too much on unnecessary ediscovery*






The Philosophy Behind “Defensible Disposal”

IBM ECM in 2013



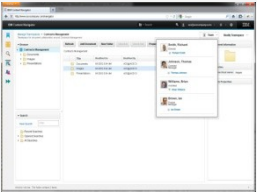



IBM's Industry Leading & Visionary Approach to ECM

Solutions

-  **Document Mgmt. Imaging & Capture**
-  **Content analytics**
-  **Advanced case management**
-  **Information lifecycle governance**
-  **Social content management**

User experience

Role Based Content User Experiences: web, mobile and desktop

-  **Content Navigator**
Content Management
-  **Content Navigator**
Mobile ECM
-  **Content Navigator**
Desktop Integration
-  **Connections/CCM**
Social Collaboration

Services

Content Foundation: content & social

Search	Collaborate	Revise	Integrate	Tag, rate
Interact	Manage	Case Objects	Federate	Comment
Discover	Collect	Lifecycle	Tasks, Events	Content Analytics
Ext. Data Services	Classify	Processes	Share	Dashboards

Infrastructure

-  **ECM inside**
Business documents, records, case & business process mgmt. content
-  **ECM inside**
Social collaboration, email, files, etc.
-  **CMIS**
Other content systems
And data, e.g. CMIS

In Summary...

- Many new IBM ECM capabilities and solutions valuable to your business!
- Plan your upgrades to latest and greatest releases to leverage these!
- Build new solutions on the industry's leading ECM platform!



Thank
YOU

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