



IBM Document Manager

Highlights

- ***Facilitates collaboration among globally dispersed users through on demand document access***
- ***Offers scalable, secure, robust and rules-based document life-cycle-management capabilities***
- ***Supports engineering content (drawings, specifications, contracts and correspondence) that are inherently complex and involve input from multiple constituents***
- ***Delivers integrated records-management capabilities with IBM Records Manager across multiple business and engineering applications***
- ***Provides a highly customizable user interface for dynamically deploying client updates to the desktop***
- ***Integrates with IBM information-management and collaboration software***

A better way to track, manage and distribute business documents

When you're on a deadline, the last thing you want to do is scramble for the latest information. Documents and the business content within are extremely valuable to any organization. However, what is equally important is the ability to efficiently control and manage documents. The ability to quickly search and locate these documents, as well as immediately understand where a document might be in its approval process, is critical to the success of your company. IBM Document Manager is the right tool to help track, share and distribute the mission-critical documents you need to do your job.

IBM can help you regain control over your business documents, as well as address your compound-document requirements, through IBM Document Manager. A comprehensive document-management solution, IBM Document Manager allows users to create, manage and control documents through familiar applications, while leveraging IBM Content Manager as the underlying repository, providing enterprise scalability and reliability.

IBM Document Manager allows you to bring greater efficiency to your knowledge workers. It also supports deep application integration with common office applications, relationship management for related documents, as well as life-cycle and records management of documents, from creation to disposition or destruction, or both. Additional capabilities include version and rendition management, as well as auditing and compound-document support, to help you more effectively develop and distribute critical business information.

Through its rich functionality, IBM Document Manager supports collaborative document creation and management across groups of globally dispersed users with interconnected roles, such as document creation, reviewing, editing and approval. By doing so, the solution can help you enhance productivity by ensuring that accurate and up-to-date documents are available on demand, across your organization.

Rich integration capabilities

A core component of the IBM content-management portfolio, IBM Document Manager integrates with IBM information-management and collaboration software, including IBM Content Manager and IBM Records Manager.

In addition, it is designed to support application integration by giving users, groups or both access to IBM Document Manager commands from familiar desktop application menus and toolbars. This integration also includes bidirectional property exchange from applications, such as Microsoft® Word, and metadata in the IBM Content Manager repository. By leveraging this comprehensive mix of products, you can create a powerful solution to manage documents, security and relationships.

IBM Document Manager eases the management of typical workloads, especially compound documents that have multiple, interrelated components. A standard operating-procedure manual, for example, might comprise a word-processing file that details procedures, an embedded spreadsheet that defines the scheduling, and a computer-aided design (CAD) drawing that displays equipment detail. IBM Document

Manager is designed to manage the relationships among all of these components, including their individual versions, to support information consistency as compound documents are shared across your enterprise. By leveraging the underlying data-modeling capabilities of IBM Content Manager, IBM Document Manager supports structural and referential integrity, enabling you to preserve particular components of the document that are needed by other documents.

Comprehensive life-cycle management

Whether it is through the browser-based IBM Desktop Client or through standard office applications, IBM Document Manager allows you to dynamically configure your organization's document life-cycle rules. You can then oversee the document approval, release and revision processes, granting access to authorized users and groups at specified stages. Integrated with IBM Records Manager, IBM Document Manager is designed to provide the capability to declare and classify documents as records through common desktop and engineering applications, such as Microsoft Office, AutoCAD, IBM Lotus Notes® and Microsoft Outlook. The records-management integration supports multiple options or modes by which

documents can be declared and classified, for example, manually, automatically or by life-cycle state. While document retention becomes transparent to the user, you can be confident that documents are secure, and your organization can more efficiently address the demands of government and industry regulatory requirements.

Easy-to-use interface

Using the IBM Document Manager desktop client, you can dynamically configure integrated functions available in office applications to grant users and groups access to varying degrees of document-management functionality. The administrative client, IBM Document Manager designer, is an object-oriented interface that can dynamically grant — without programming — access to client capabilities or functionality provided by any of the IBM Document Manager services or components. For example, an administrator can insert a number of IBM Document Manager commands, such as CHECKIN, CHECKOUT or MANUALLY DECLARE RECORD, into an existing desktop application. This means users can leverage familiar applications with IBM Document Manager and directly access documents stored in IBM Content Manager. Through IBM Document Designer, you can define IBM Content Manager item types, classes and life-cycle processes, and configure system settings for the print/plot, rendition and automation services.

Tailoring a solution to your needs

The core component of the system is the IBM Document Manager server. The server can communicate with the IBM Document Manager desktop and with the document-management environment that includes a content repository, such as IBM Content Manager or IBM FileNet Content Services (versions 5.3 and 5.4). It doesn't matter if they're on the same server, on different servers in the same building or on different servers on different continents. To the user, the entire IBM Document Manager system appears as an extension of the desktop. To the IT manager, its three-tiered structure supports a scalable system, the components of which can be deployed as needed and distributed across multiple servers or clients.

The robust services of IBM Document Manager are designed to provide you with the capability to dynamically automate business processes. For example:

- IBM Document Manager Automation Services is a rules-based service designed to allow for unattended actions to be executed on documents stored in the system. Actions can be as simple as delete, archive or transition, or as sophisticated as triggering external applications, like a drawing program or a records management program.
- IBM Document Manager Lifecycle Services, a rules-based application, gives administrators the flexibility to determine the level of control to exercise over the creation, modification and distribution of important documents. By building the company's business rules into the system, the administrator can specify who can initiate a change, edit a document or approve final changes. Some of these rules can also trigger automatic actions when a document moves from one stage in its lifecycle to the next, such as distributing a Portable Document Format (PDF) rendition or archiving it to IBM Content Manager, based on rules defined in IBM Records Manager.
- IBM Document Manager Rendition Service enables you to publish, distribute and manage the renditions of retention records of important documents. Supported file formats include PDF as well as tagged image file format (TIFF).
- IBM Document Manager Notification Service supports greater productivity among your users by delivering the capability to automatically send e-mail alerts to individuals or groups. Messages can contain property information, such as author names, creation dates, file types, copies, document links or notice (for example, that new procedure drawings are available).
- IBM Document Manager Print/Plot Services enable users to print high-quality output from multiple file types, with the capability to select a single file, several files or an entire folder to print and queue the print job to the selected output device. Multithreaded processing enables the print/plot manager services to process multiple queues concurrently. Services include engineering-related plot capabilities.
- IBM Document Manager Cache Manager is designed to help reduce heavy resource utilization that can occur in client/server applications. IBM Document Manager Desktop leverages the use of cache files through IBM Document Manager Cache Manager, a configurable service that contains user and group configuration information covering menus, action dialogs and folders. This service can be configured to update user configuration information on a schedule specified by the administrator, to deploy updates to the desktop in the background while maximizing performance.

Extending content-management solutions

With the business landscape growing increasingly competitive, the efficient management of your business documents is critical to the success of your organization. Integrating IBM Document Manager into your day-to-day business processes and applications can make it easier for your knowledge workers to manage documents and collaborate with one another, delivering productivity and efficiency gains across your organization.

IBM Document Manager helps you manage and control documents by:

- *Supporting integrated records-management capabilities with automated document-retention rules that are transparent to users, along with the option to manually declare and classify documents by users and groups through standard office and CAD applications.*

- *Supporting document life-cycle management by allowing the administrator to configure document life-cycle rules based on a simple, object-oriented point-and-click interface.*
- *Providing a scalable and extensible platform that integrates across existing business applications and works with IBM Content Manager and IBM Records Manager, as well as Lotus Instant Messaging and Domino Document Manager.*

For more information

To find out more about IBM Document Manager, contact your IBM representative or IBM Business Partner, or visit:

ibm.com/software/data/cm/docmgr



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TAKE BACK CONTROL WITH **Information Management**

IBM Document Manager at a glance

Software requirements

Server operating system

- Microsoft Windows XP Professional SP1
- Microsoft Windows XP Professional
- Microsoft Windows 2003 Server
- Microsoft Windows 2000 Advanced Server (SP)4
- Microsoft Windows 2000 Server (SP) 4
- Microsoft Windows 2000 Professional SP

Web browser support

- Microsoft Internet Explorer 7 on Windows XP and Windows Vista
- Microsoft Internet Explorer 5.0, or later

Repository

- IBM Content Manager for Multiplatforms, Version 8.3
- IBM Content Manager Enterprise Edition, Version 8.3
- Microsoft Windows XP
- Microsoft Windows 2003
- Microsoft Windows 2000

Integrated records management is supported when IBM Document Manager is used with IBM Content Manager, Version 8.3; IBM Records Manager, Version 4.1.1, or later; and IBM Records Manager Enabler, Version 8.3, or later.