

Content Manager OnDemand Product Overview

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ECM Client Technical Professional



Agenda

- Key business drivers
- OnDemand product overview
- Architecture & capabilities
- What's new



TOO MUCH PAPER???!!!

Have you ever looked up
your bank statement online?

A check image?

Your credit card statement?

Your phone bill?

Congratulations! You're an
OnDemand user!



IBM Content Manager OnDemand Overview

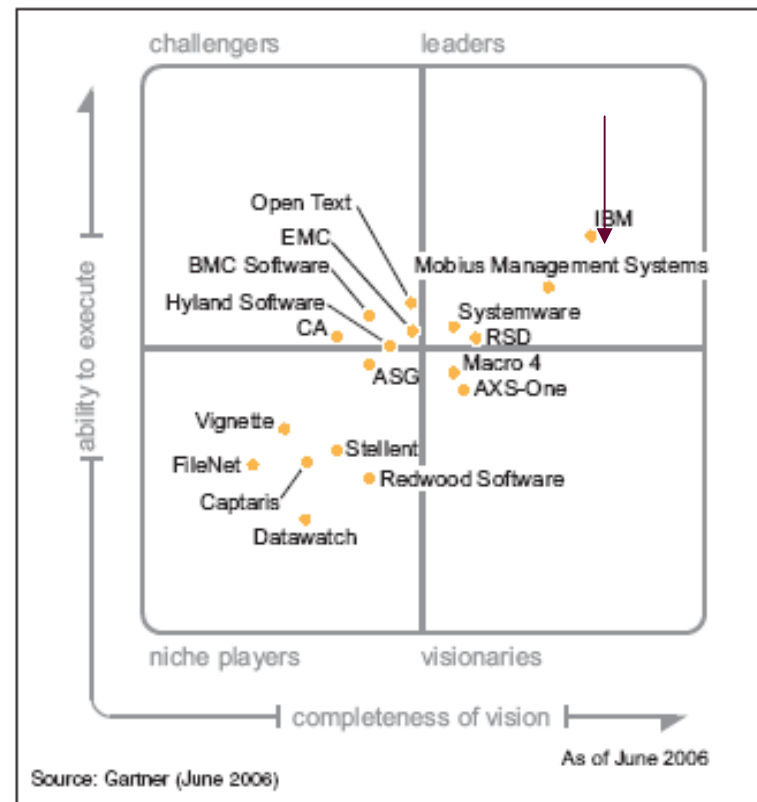
- High performance technology for highly reliable enterprise report management and presentation
- Information can be distributed to internal customers as reports, a call center, customer self-service terminal, internet, email, print, I-Pad and more
- *If you have teenage kids, do they even pay attention to regular mail?*
- Helps reduce printing costs, increases customer satisfaction and has a proven Return on Investment.
- Companies may be able to realize up to 90% storage savings for high volume statements, enhanced support for multi-channel distribution as well as improved customer service.
- Industry estimates report that customers today can save up to \$25 million annually with the move to electronic statements.



IBM Content Manager OnDemand can help reduce costly printing costs by transferring costly high volume print output to electronic capture and presentation.

Content Manager OnDemand

- OnDemand was created in the mid-1990s and has continued to grow in capability and customers
- OnDemand is the clear Enterprise Report Management leader
- Supports a wide range of hardware and software platforms
- Large customer base, large skill base
- OnDemand growth continues to out-pace our competition



Key Use Cases for OnDemand

High-Volume Archival of Static Content

- Statements, invoices, Confirms, ...
- Check images and other static content....Greg's Personal experience

eStatement Presentment

- Enable direct customer access to bills and statements
- Enable call centers to access the identical statement or bill...Greg's personal experience
- Reduce paper and mailing costs

eReport Management

- Back-office research on reports...Greg's Personal experience
- Mining information from Statements & reports

Benefits of Using CM OnDemand

- Improve responsiveness - quickly resolve billing and other inquiries to improve customer satisfaction and retention.
- Provide Web access - to paper documents, 24x7.
- Provide access to documents via i-Pad or i-Phone
- Improve customer self-service - with the ability to provide online access to statements and other customer information.
- Reduce printing costs and paper use - go **green**.
- Avoid storing paper documents - this is not cost-effective and exposes customers to total loss if the paper documents are inadvertently destroyed.



Difference in Repositories

- There is a reason that **Report Management Repositories** are different than **Content Management Repositories**



– Report Management

- Optimized for large “loads” of many, many individual 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)

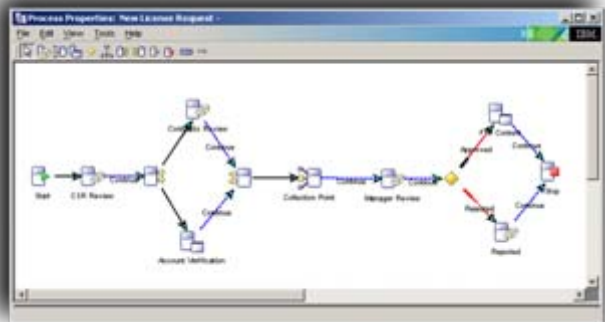


- *Forcing content from one repository into the other compromises the special features, scalability and performance of the optimized repository*

Content/Image versus Archive

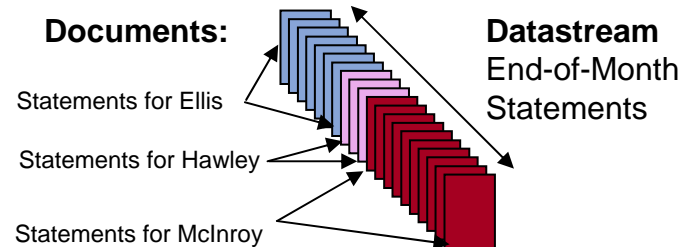
P8 & CM8

- Work in progress
- Content/Image System
- Paper intensive
- Individual documents
 - Word
 - Scanned
 - Fax
- Document management
- Creation, versioning, check in and out
- Documents loaded one at a time



CMOD

- After Process
- Long term archive
- Large datastreams with potentially 1,000,000+ documents daily
- Ideal for check image archive
- Many documents loaded at the same time
- Little or no workflow
- NO report creation capability
- Documents loaded in batch



Types of Content Supported

Complex Print Documents

Faxes

PDF Documents

PC Documents

BAXTER BAY BANK
Online Banking 24 hours a day.

STATEMENT DATE: 10/20/05
CREDIT LIMIT: 8000.00
ACCOUNT NUMBER: 000-000-152

MAKE CHECKS PAYABLE TO: BigBucksCard
DIRECT PAYMENT OR INQUIRIES TO: BigBucks CUSTOMER P.O. BOX PHONE (772) 7722 0

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

PAST DUE	CURRENT DUE	MINIMUM PAYMENT DUE	NEW BALANCE	BY THE DATE	YEAR-TO-DATE
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.	+ ANNUAL PERCENTAGE RATE	NEW BALANCE
5111.84	2048.62	0	277.86	0	7.38	277.86

13 Longview Brookfield, 203-715-1444

Robert (Bud) Paton

March 27, 2005

Quality Complete Garden Services
Subject: Property at 3240 S. Bellaire Street, Denver CO

Dear Kim,

Thank You for taking care of my property at 3240 S. Bellaire Street. Enclosed is a check for mowing two times and fertilizing the lawn. Since I live in Denver, I will be mowing after my property at 3240 S. Bellaire. If the property needs any work, please call me for approval of any work needed on the property.

11/01/99
10:17
MSR94

3 We became a globally integrated enterprise in order to capture the best growth opportunities and improve IBM's profitability.

IBM operates in more than 170 countries and employs more than 350,000 people worldwide. Our non-U.S. operations generated approximately 80 percent of IBM's revenue in 2004. IBM's Growth Markets Unit, which was established in 2004,

grew 10 percent last year and made up 10 percent of our revenue. Revenue increased 18 percent, 15 percent in total turnover in Brazil, Russia, India and China.

IBM revenue by region:

Region	Revenue Growth
IBM Americas	82%
IBM Europe	5%
IBM Asia Pacific	2%
IBM Global Business Services	18%
IBM Business Development	10%
IBM Global Services	10%

We are enhancing our spending in order to provide opportunity for us to continue to drive significant productivity in North America, as we are increasing investment in Canada, Europe, and other regions. We are also investing in our global research and development to drive higher productivity across the company.

	A	B	C	D	E
1	Release		Date		
2					
3	7.1.2.2		03/15/05		
4	7.1.2.1		01/14/05		
5	7.1.2.0		09/17/04		
6					
7	7.1.1.3		09/13/04		
8	7.1.1.2		06/21/04		
9	7.1.1.1		03/15/04		
10	7.1.1.0		12/26/03		
11					
12	7.1.0.15		09/09/03		
13	7.1.0.14		06/30/03		
14	7.1.0.13		04/25/03		
15	7.1.0.12		02/21/03		
16	7.1.0.11		12/20/02		
17	7.1.0.10		10/31/02		
18	7.1.0.9		09/13/02		
19	7.1.0.8		07/02/02		
20	7.1.0.7		05/02/02		
21	7.1.0.6		02/28/02		
22	7.1.0.5		12/14/01		
23	7.1.0.4		09/21/01		
24	7.1.0.3		07/14/01		

CUSTOMER: Betty's music store
Muscatine Plaza
200 Lower Muscatine
Cedar Falls, IA 50613

ACCOUNT NUMBER: 11887
CONTACT: Betty Yoder

MEDIA QTY	DESCRIPTION	LABEL/NO
	ORDER NUMBER: 536017	SHIP DATE: 10/06/99
CD 4	Bartok, Sonata for Solo Violin	MK-4262
7	Mozart, Mass in C, K.427	420831-2
2	Lueneng, Electronic Music	CD 611
	abat Mater	SBT 4828
	ER: 536039	SHIP DATE: 10/21/99
	Chetique Sonata, Arau	420153-2
	War March of the Priests	SHK 47592
	sa di Requiem	CHAN 8964
	Trombone Masterpieces	ADA 581087
	American in Paris	ACS 8034

PAT D. NERO
5515 BEAR LANE
LAGUNA NIGUEL, CA 92677-4757

90-7162/3222
3833014362

March 20, 2008

PAY TO THE ORDER OF: CHSD School District

Two Thousand dollars only \$ 2000.00=

Washington Mutual
Washington Mutual Bank, FA
2405 Saver Ct. 92626 (949) 948-7000
24 Hour Customer Service

PD Nero

NOTES:

⑆27⑆393627⑆ ⑆4366⑆3933⑆ 0704

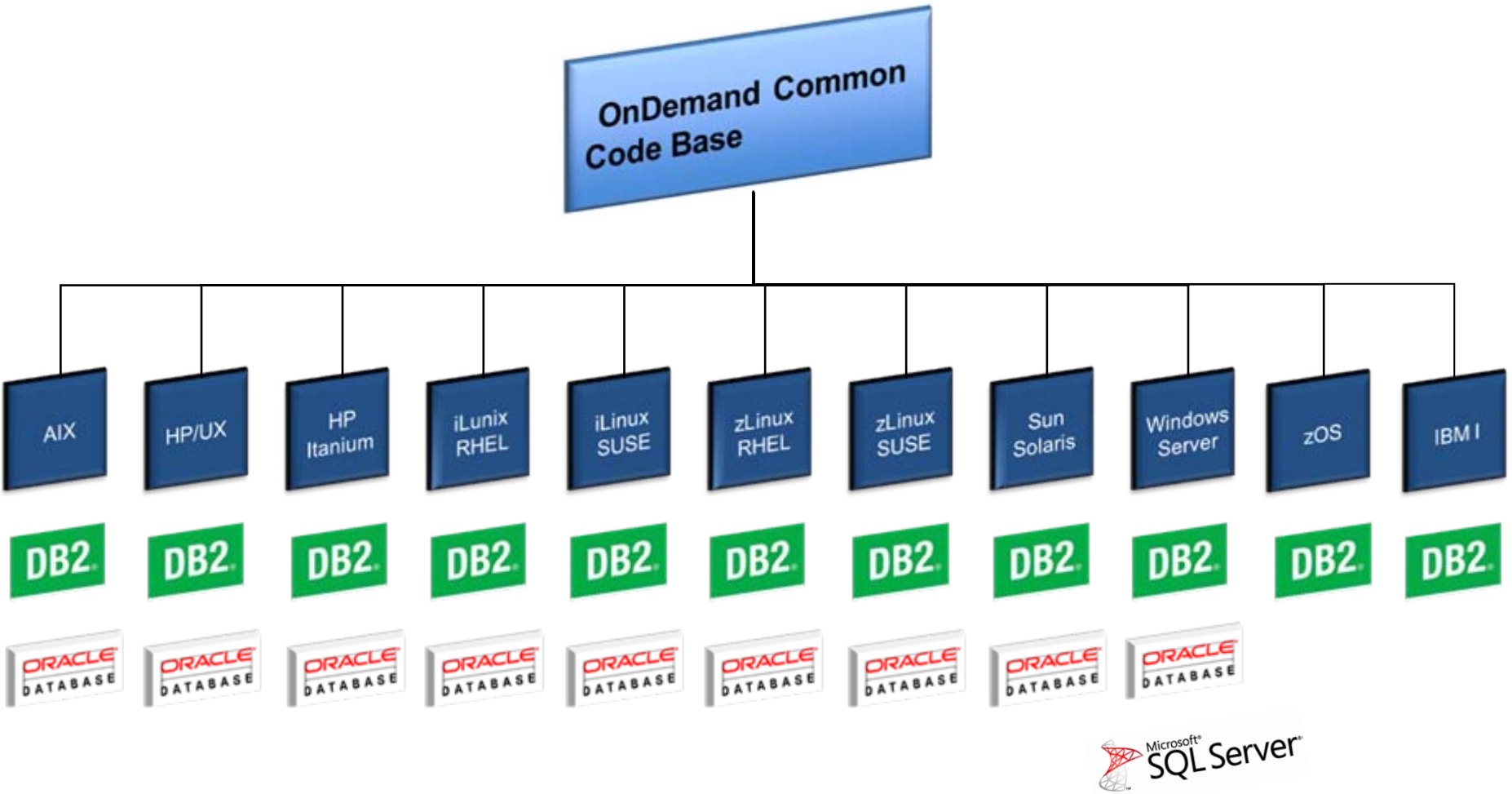


Photos

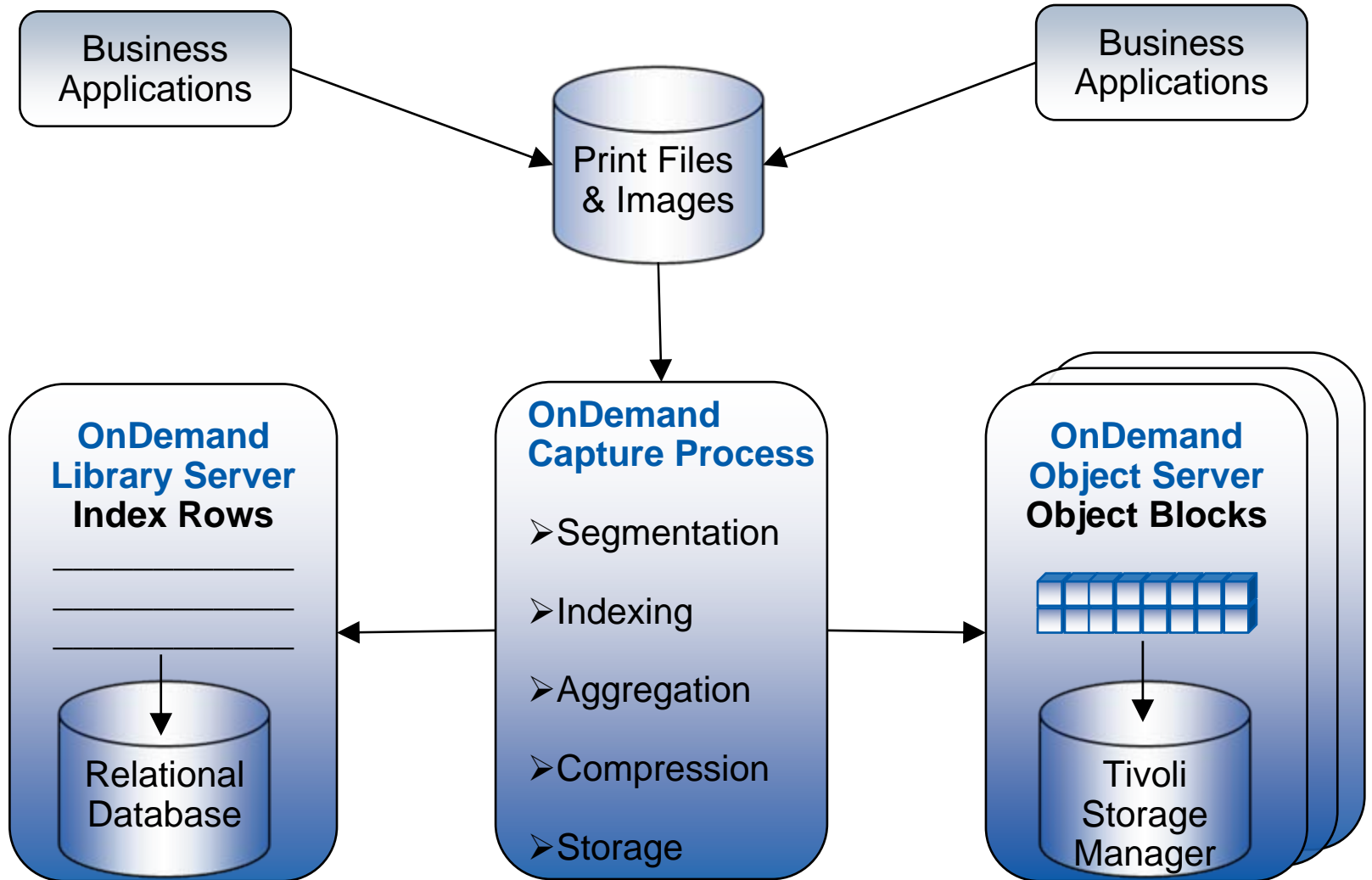
Check Images

Internal Reports

OnDemand Platform and Database Support



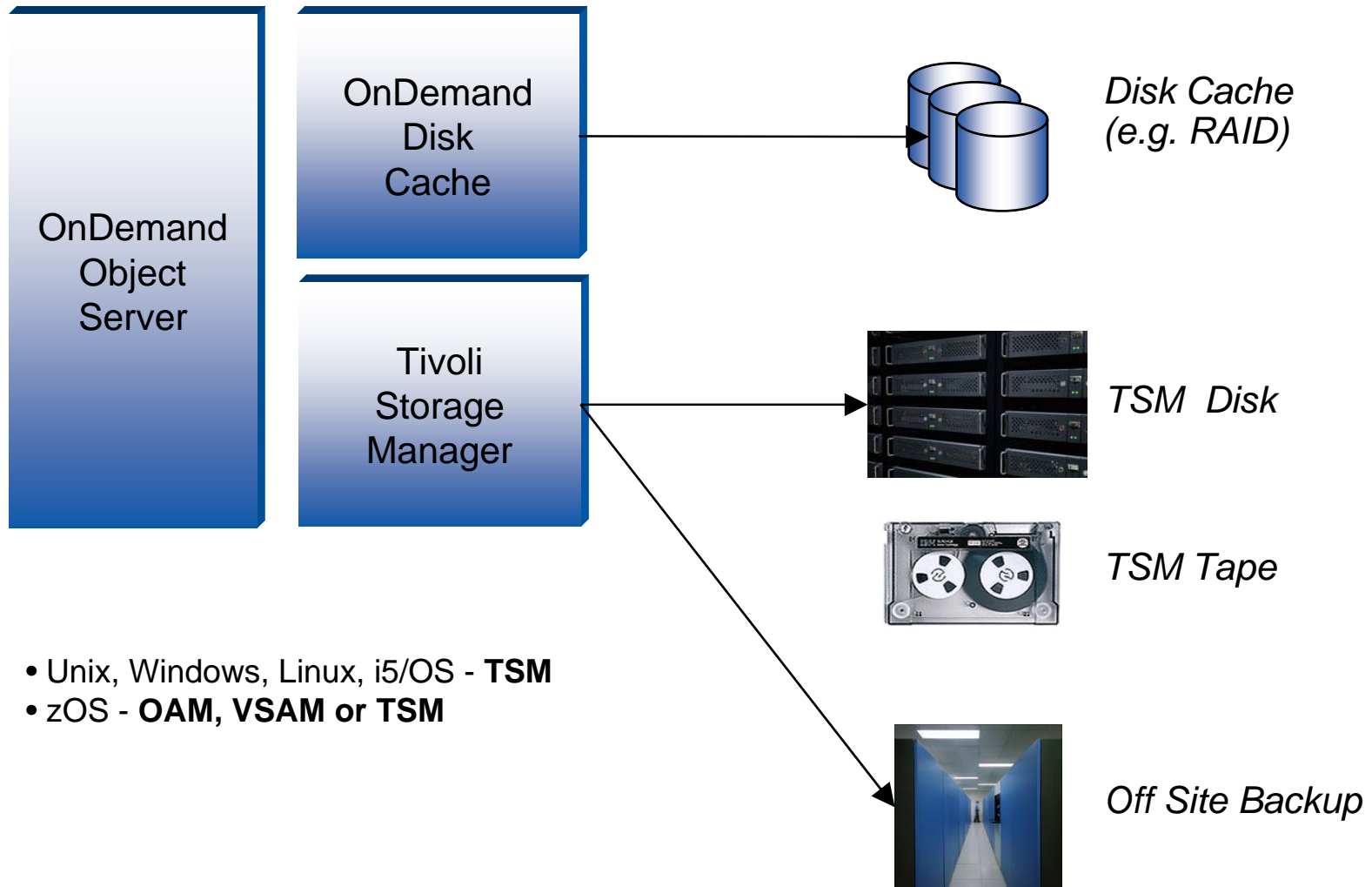
OnDemand Architecture



Compression and Optimizing PDF file storage

- Typical compression ratios of 8:1 to 30:1
- AFP resources stored once
- 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.

OnDemand Storage Management, Expiration and HSM



Searching for Data

Credit Card Statements - Search Criteria and Document List

Search Criteria

Account: Like 000-000-001

Date: Between 01/01/1994

Account Name: Like

Account Balance: Equal To

Document List

Account	Date	Acco
000-000-001	11.03.1994	ADR
000-000-001	10.03.1994	ADR
000-000-001	09.03.1994	ADR
000-000-001	08.03.1994	ADR
000-000-001	07.03.1994	ADR
000-000-001	12.03.1994	ADR

BAXTER BAY BANK

More Bank for the Buck

PAGE 1
OF 1

STATEMENT DATE
11/03/94

CREDIT LIMIT
13000.00

CHECK NUMBER	AMOUNT OVER LIMIT
12926	0

ACCOUNT NUMBER
000-000-001

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

*Adrian Cyclery
 611 N. Main St
 Adrian, MI 49221*

AMOUNT PAID

PLEASE DETACH AND RETURN THIS TOP PORTION WITH PAYMENT

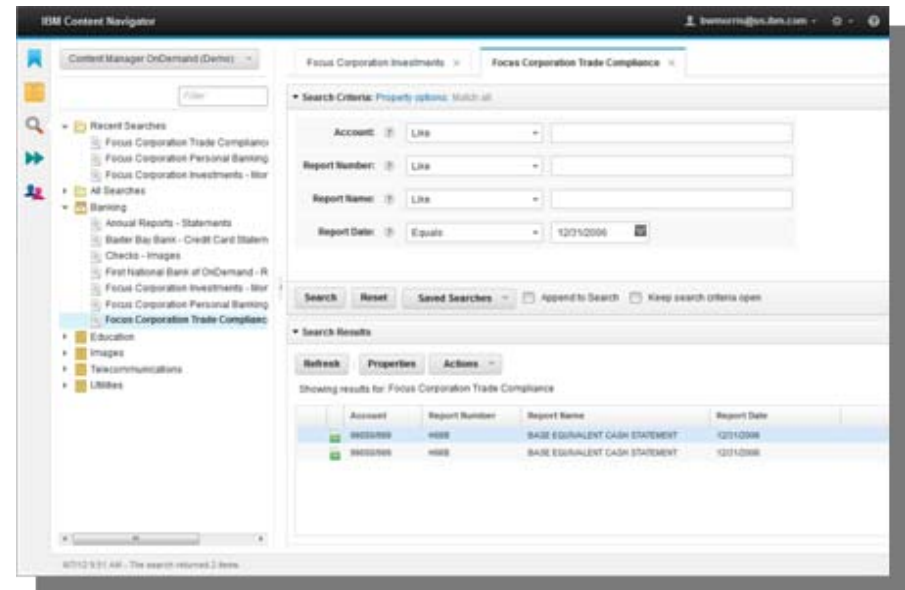
PAST DUE	CURRENT DUE	MINIMUM PAYMENT DUE	PAY EITHER AMOUNT	NEW BALANCE	PAY NEW BALANCE BY THIS DATE TO AVOID ADDITIONAL FINANCE CHARGE	YEAR TO DATE FINANCE CHARGE
3	7.36	7.36	← →	73.56	← 12/03/94	42.60

STATEMENT DATE 11/03/94 **ACCOUNT NUMBER** 000-000-001 **ANNUAL PERCENTAGE RATE** 21.00 %

PREVIOUS BALANCE	PAYMENTS	CREDITS	PURCHASES	CASH ADV.	FINANCE CHARGE FROM PERIODIC RATE	FINANCE CHARGE FROM PREVIOUS BALANCE	NEW BALANCE
5667.06	3616.36	0	73.56	0	12.23		73.56

Content Navigator search - CMOD

- Saved searches list
 - Users can access their cabinets and folders in a tree view, filter the tree view and access recently used searches
- Saved search criteria
 - Similar to the OD windows client, users can save query criteria associated with an OD folder
- Append search
 - Ability to add results from a new query to an existing query result set.
- Print
 - Ability to send one or more documents to a local or server printer.



IBM Content Navigator - Mozilla Firefox

File Edit View History Bookmarks Tools Help

localhost:9080/navigator/?desktop=Demo

IBM Content Navigator admin

CMODServer

Bluebell Telephone x Loan Delinquency Reports x

Search Criteria: Property options: Match all

Search Results

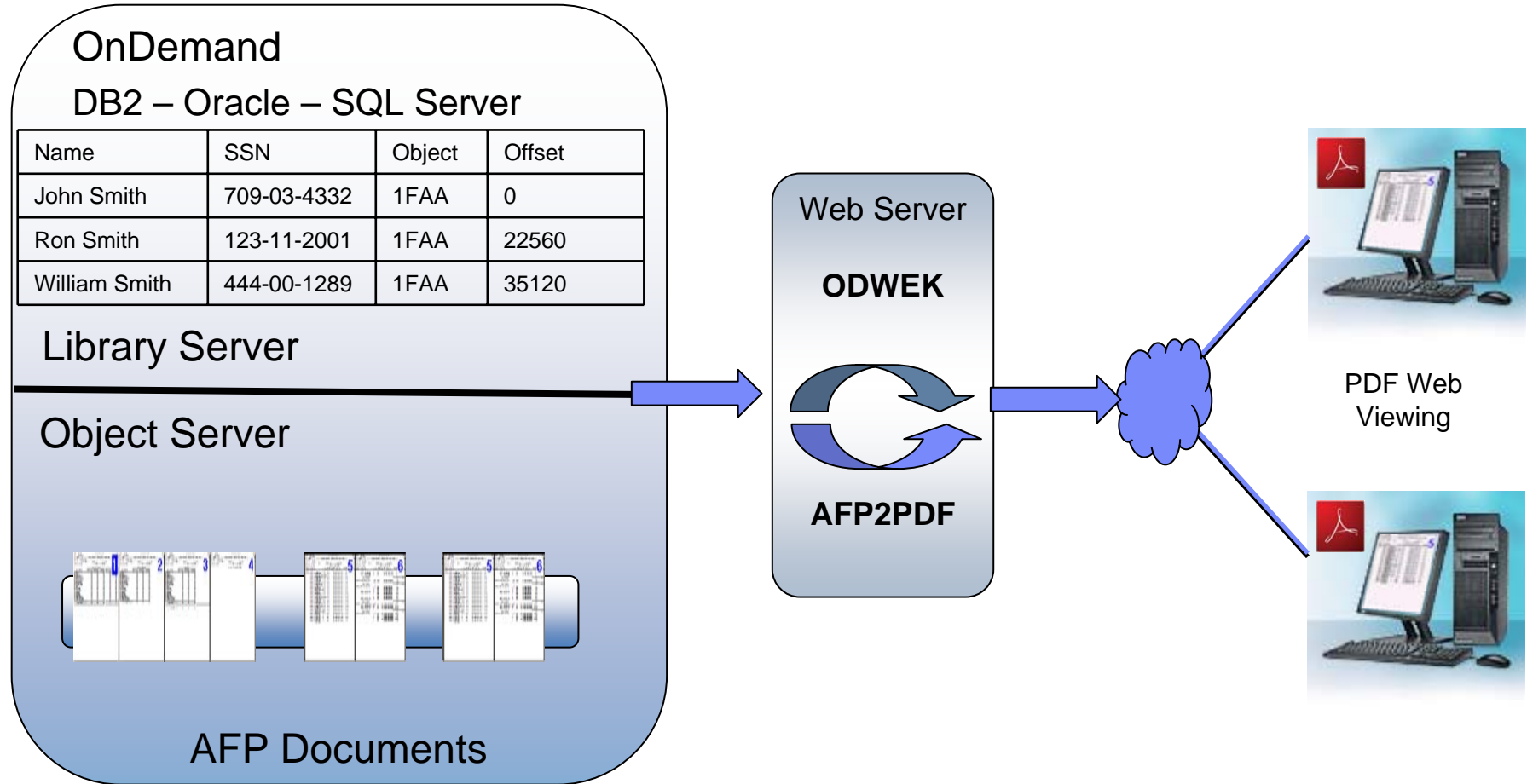
Refresh Properties Actions

Showing results for: Loan Delinquency Reports

	Date	Begin Loan Number	End Loan Number	Full Text Highlight	Load Date	Doc Size
	01/10/1994	10000	1000999			509400
	01/10/1994	1010000	2000999			509400
	01/10/1994	2010000	3000999			509400
	01/10/1994	3010000	4000999			509400
	01/10/1994	4010000	5000999			509400
	01/10/1994	5010000	6000999			509400
	01/10/1994	6000000	7000999			509400
	01/10/1994	7000000	8000999			509400
	01/10/1994	8010000	9000999			509400
	01/10/1994	9010000	10000999			509400
	01/10/1994	10010000	11000999			509400
	01/10/1994	11010000	12000999			509400
	01/10/1994	12010000	13000999			509400
	01/10/1994	13010000	14000999			509400
	01/10/1994	14010000	15000999			509400
	01/10/1994	15010000	16000999			509400
	01/10/1994	16010000	17000999			509400
	01/10/1994	17010000	18000999			509400
	01/10/1994	18010000	19000999			509400
	01/10/1994	19010000	20000999			509400
	01/10/1994	20010000	21000999			509400

12/13/12 12:00 PM - The search returned 100 items.

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



OnDemand Performance and Scalability

- OnDemand is a very efficient and scalable repository
 - 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 19 petabytes of data



See

http://www.viewpointe.com/uploadedFiles/201202_Check%20Archive%20factsheet.pdf

29PB.....185 billion items.....8.7 million retrievals per day!

Datawatch Integration

- **Web-based Report Mining Solution**
- Automatic report data transformation based on Monarch server technology
- One-click access to any report data in web and Excel spreadsheets format
- In browser data filtering, sorting and graphing of report data
- Summary report engine
- Optional drag-and-drop multi-dimensional cube-based analysis tool
- XML enable reports



```

11/01/99          CLASSICAL MUSIC DISTRIBUTORS          PAGE 01
10:17             MONTHLY SHIPPING REPORT
HSR94             FROM 10/01/99 TO 10/31/99

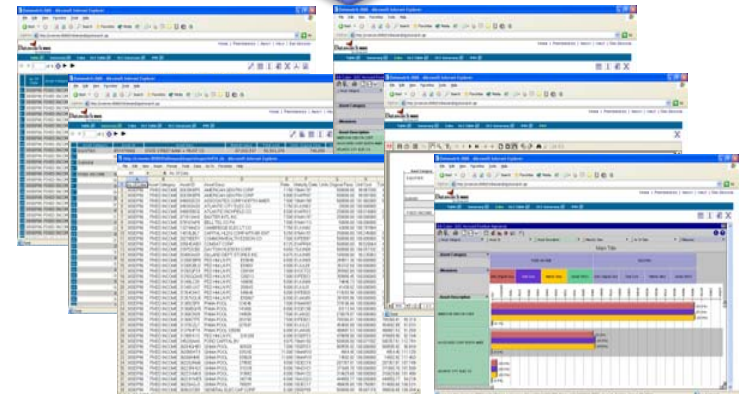
CUSTOMER: Betty's Music Store
            Muscatine Plaza
            200 Lower Muscatine
            Cedar Falls, IA 50613

ACCOUNT NUMBER: 11887
CONTACT: Betty Yoder

MEDIA QTY  DESCRIPTION                                LABEL/NO.    UNT_PRC    AMOUNT
CD         4  Bartok, Sonata for Solo Violin          MK-42625     8.99      35.96
           7  Mozart, Mass in C, K.427                       420831-2     9.00      63.00
           2  Luening, Electronic Music                       CD 611       10.19     20.38
TAPE      9  Scarlatti, Stabat Mater                            SBT 48282    5.99      53.91

            ORDER NUMBER: 536017    SHIP DATE: 10/06/99
CD         11 Beethoven, Pathetique Sonata, Arau        420153-2     5.99      65.89
           8  Mendelssohn, War March of the Priests        SHK 47592    8.99      71.92
           10 Pizzetti, Messa di Requiem                 CHAN 8964    9.59      95.90

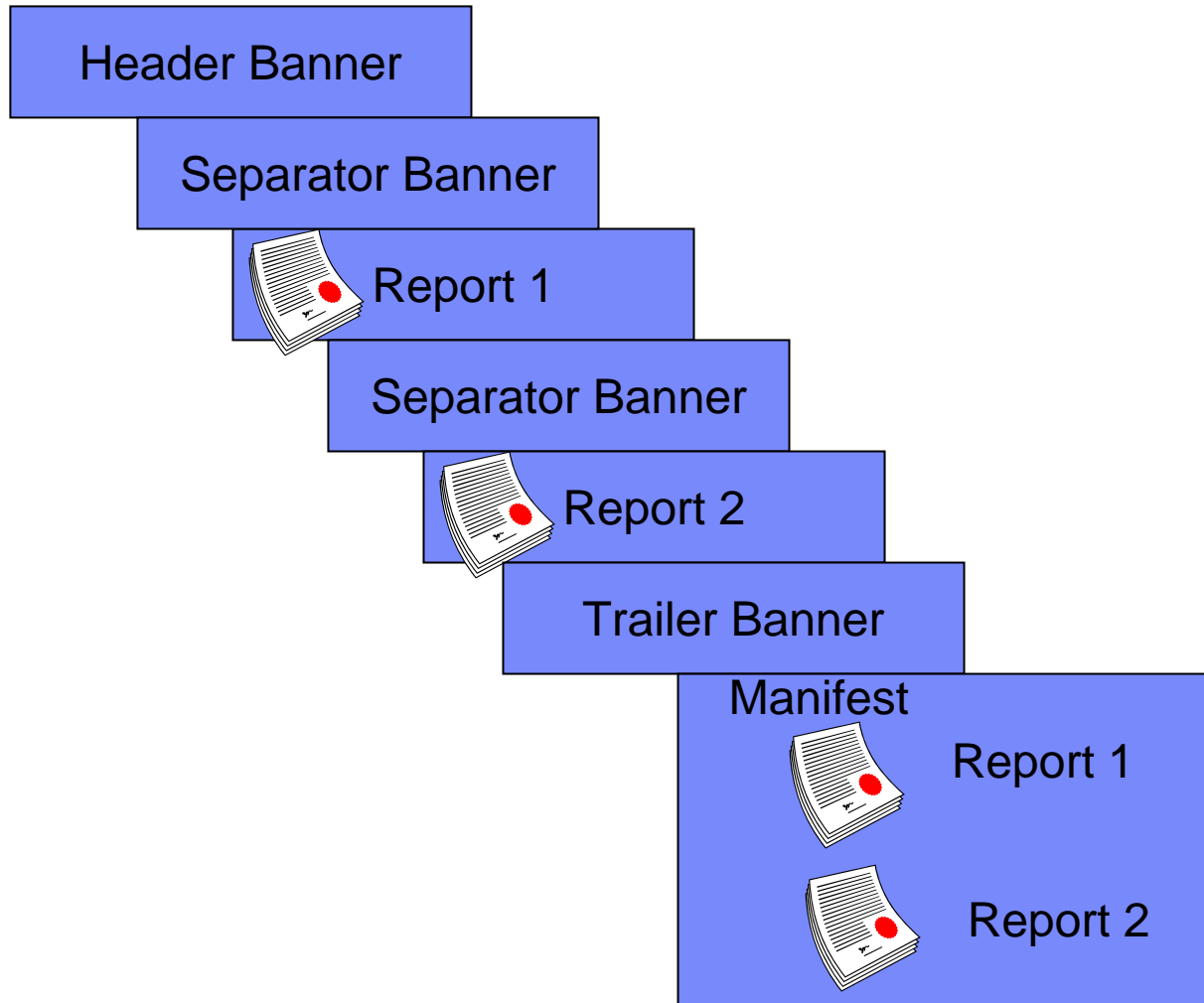
LP         6  Misc., Modern Trombone Masterpieces      ADA 581087   10.79     64.74
TAPE      6  Gershwin, An American in Paris                ACS 8034     5.99      35.94
    
```



Report Distribution Overview

- an easy way to automatically group reports and portions of related reports together
- an easy way to organize reports
- the ability to convert the report data into different formats
- the ability to send the grouped or bundled reports through e-mail to multiple users
- the ability to make grouped or bundled reports available for printing

Bundle Example



Compliance Requirements

- OnDemand provides a long-term archive of critical business documents for companies
- Recent OnDemand releases added key capabilities to enable companies to meet compliance requirements
 - Built-in retention management and hold
 - Support for IBM Enterprise Records



OnDemand Holds

- OnDemand supports putting documents on hold through the Windows and Navigator clients
 - Based on a Hold Reason (e.g. legal case name)
- Holds do not change or manage expiration, they just prevent document from expiring or being deleted
- Holds are efficient for large numbers of documents
- A single document can be in multiple holds
- Implied hold enables management of document retention by an external system

	Date	Account	Account Name	Account Balance	Lockdown	CFS
	05/03/94	000-000-000	SMITH CYCLERY CO	197.32	2	0
	05/03/94	000-000-001	ADRIAN CYCLERY	1521.54	2	0
	05/03/94	000-000-002	JACK'S CYCLERY	1854.50	2	0
	05/03/94	000-000-003	DENNIS BICYCLE SHOP	1927.11	2	0
	05/03/94	000-000-004	TERRY'S SPORTS	997.60	2	0
	05/03/94	000-000-005	COBBLESTONE SCHWINN	12.80	2	0
	05/03/94	000-000-006	SUMMIT SPORTS	1654.70	2	0
	05/03/94	000-000-007	ANN ARBOR CYCLERY	2579.20	2	0
	05/03/94	000-000-008	CAMPUS BIKE	1942.30	2	0
	05/03/94	000-000-009	CYCLE CELLAR	925.90	2	0
	05/03/94	000-000-010	GREAT LAKES CYCLING	1981.20	2	0
	05/03/94	000-000-011	STUDENT BIKE SHOP	60.70	2	0
	05/03/94	000-000-012	WACHTMAN CYCLERY	1000.00	2	0

What's New

OnDemand Release Summary

2007	2008	2009	2010	2011	2012
<p>OnDemand MP 8.4.0</p> <ul style="list-style-type: none"> •ODWA •64-bit addressing space on Linux™, AIX®, HP-UX and Solaris •Native Lightweight Directory Access Protocol (LDAP) support for login authentication •Usability enhancements: •Event-based expiration •Ability to change the life of cached data retroactively •Server-based sorting •IBM WEBi •IPv6 compliance <p>OnDemand zOS 8.4.0</p> <ul style="list-style-type: none"> •Define DB2® database information •Exploitation of 64-bit addressing space on Linux™, AIX®, HP-UX, and Solaris platforms, •Expanded database support for Oracle 10g Release 2 and IBM DB2 Universal Database® V9 •AFP™ transforms 	<p>OnDemand MP 8.4.1</p> <ul style="list-style-type: none"> •Enhanced Retention Management •Support for IBM FileNet P8 •PDF indexing enhancements •Oracle on Intel Linux •Linux support for the ODWA •Additional LDAP servers supported •CITRIX support •API enhancements to ODWEK •ACIF indexer enhancements <p>OnDemand i5 6.1</p> <ul style="list-style-type: none"> •IASPs for archived data and the location of new instances. •Support for TSM as a storage level •Batch Administration •WEBi •Change life of cached data retroactively •Single table creation for an application group. 	<p>OnDemand zOS 8.4.1</p> <ul style="list-style-type: none"> •Enhanced Retention Management •Support for IBM FileNet P8 •OS/390® indexer enhancements •ODWEK 64-bit •OnDemand Distribution Facility support for PDF e-mails •PDF indexing enhancements •Citrix support •API enhancements to ODWEK •ACIF indexer enhancements •Consumability and usability enhancement 	<p>OnDemand i5 7.1</p> <ul style="list-style-type: none"> •Enhanced Retention Management •PDF indexing enhancements •Support for IBM FileNet P8 •AFP2WEB for inbound/outbound transforms of AFP to HTML or PDF •Support for Sun and Novell LDAP servers •API enhancements to ODWEK <p>OnDemand MP 8.5.0</p> <ul style="list-style-type: none"> •Unicode support •Multiple language folder field names •64-Bit Windows Server •SSL support between OnDemand client and server •FIPS 140-2 •DECFLOAT in DB2 •Multiple TSM servers from the same Object Server 	<p>OnDemand zOS 8.5.0</p> <ul style="list-style-type: none"> •Enhanced reporting and analysis •Indexing enhancements for AFP and PDF data •Support for SSL communication with LDAP •FIPS 140-2 •Multiple language folder field names •Unicode support •Multiple TSM servers •DECFLOAT data type in DB2 •Extend OAM repository interface •Enhancements for ease of installation •Administer ODF from the OnDemand Windows Administrator. 	<p>OnDemand 9.0 MP and z</p> <ul style="list-style-type: none"> •Full Text Search •FSM Integration •User Proxy •Password restriction •Last Login •RDF Performance •Database timestamp •128 Metadata fields •Adding fields to existing folder def'n •Graphical Annotation in Line Data Applet •Enhanced Metadata Update •OOTB integration with Excel •CMIS Read-Only •OS/390 Indexer on AIX <p>OnDemand i5 7.1 Refresh</p> <ul style="list-style-type: none"> •Unicode support •Multiple language folder field names •64-Bit Windows Server •SSL support between OnDemand client and server •FIPS 140-2 •DECFLOAT in DB2 •Multiple TSM servers from the same Object Server

OnDemand 9.0 for MP and z

- **ECM Dashboard and FSM integration** –provides real time view of system activities including loads, memory
 - FSM can monitor the OnDemand system log and report when errors occur
 - FSM listener which is directly implemented in the arsockdprogram and can be attached to via a network port to relay information to a listening program
- **Full Text Search**
 - Search complete text of document, not just meta data or document parts
- **Userproxy** -Ability for login with normal user id, but not have to be defined to OD. (ie. Login with LDAP userid/passwd but then use a generic role based user id in OD)
- **Last login** -If no login within 90 days then user becomes disabled
- **Password limits/restrictions**
 - Validate against 0-10 previously used passwords
 - Notify user within n days of password expiring
 - Disable a user after n failed login attempts
 - Lock out user after n failed login attempts for x minutes

OnDemand 9.0 for MP and z

- Report Distribution performance improvements
- OnDemand password stash file –eliminates use of useridand/or password on command line
- Database timestamp support –removes limitations of OD timestamp support and provides fractional second support
- Support for 128 metadata fields –increased from 32
- Adding field(s) to existing folder definition
- Content Navigator support
 - Provides an out of box common client for CM8, P8 and CMOD
 - Supports accessing content from mobile devices
 - Extensible and pluggable framework
 - Supports adding new actions, panels, viewers, etc.

OnDemand 9.0 for MP and z

- Graphical annotation support with ODWEK line data applet –matches existing support in Windows client
 - Enhanced metadata update -allows the end user to update the document metadata from either the document list or the document view
 - Enhanced upgrade process, which allows for easier backout–V9.0 going forward
 - OOTB integration with Excel
- Allows end user to export the field details for the selected document list items in a comma delimited format.
- CSV file will launch in a separate program window according to windows file association settings for the *.CSV extension.
- CMIS Read-Only support -OASIS standard for ECM interoperability implemented by all major ECM repository vendors
 - OS/390 Indexer to AIX

OnDemand 9.0 for MP and z

- PDF Indexer Floating Trigger support
 - Enables indexing where trigger is not consistent from page to page in a PDF document
- Arsafpd-command line utility with two functions:
 - Dump AFP structured fields in a readable format
 - Identify whether a file is line data, AFP or PDF. If the file is line data, arsafpd will attempt to determine characteristics of the file such as the record format, the code page, and the carriage control.
- zOS Installation Wizard -enhanced to simplify installation

Additional Information

- OnDemand Info Center

<http://pic.dhe.ibm.com/infocenter/cmod/v9r0m0/index.jsp?topic=%2Fcom.ibm.ondemand.doc%2Fic-homepage.html>

- Get started

- [Information Management Lifecycles](#)
- [What's new in IBM Content Manager OnDemand for Multiplatforms Version 9.0](#)
- [What's new in IBM Content Manager OnDemand for z/OS Version 9.0](#)
- [What's new in IBM Content Manager OnDemand for i Version 7.1](#)
- [What's new in the IBM Content Navigator](#)
- [Content Manager OnDemand for Multiplatforms Version 9.0 System requirements matrix](#)
- [Content Manager OnDemand for z/OS Version 9.0 System requirements document](#)
- [Content Manager OnDemand for i Version 7.1 System requirements matrix](#)
- [Compatibility matrix for the Content Manager OnDemand clients and servers](#)
- [Upgrade Guide for Content Manager OnDemand Servers](#)

- 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/>

Summary

OnDemand Helps You:

- Archive high-volumes of content efficiently and at low cost
- Lower your printing costs
- Lower your storage costs
- Lower your customer service costs
- Improve customer service
- Generate a high return on your investment