

| | | | |
|---------------------|---|--------------------------------|-----------|
| Introduction | <p>ECM as part of Information On Demand</p> <p>ECM Maturity and Adoption</p> <p>Current Portfolio position</p> <p>Roadmap</p> <p>Vision for ECM</p> | <p>Doug Coombs</p> | 30 |
| Content | <p>The Changing Market for Content Management</p> <p>The Role of ECM in Collaboration</p> <p>ECM user interface for the desktop and the web</p> <p>Advanced Search and Analytics</p> | <p>Thorsten Zoerner</p> | 60 |
| Process | <p>Activating Content and Business Process Management</p> <p>The Roadmap for Content Centric Process Tools including product demonstrations</p> <p>IBM Business Process Management Strategy</p> <p>What's next for Process?</p> | <p>Daniel Crow</p> | 60 |
| Compliance | <p>Control and Enforcement</p> <p>Product positioning, roadmap and demonstrations for records and email</p> <p>Classification for ECM</p> <p>What are eDiscovery and the ECM framework for compliance?</p> | <p>Graham Hadingham</p> | 60 |
| Platform | <p>The Repository Roadmap and Federation</p> <p>Next Steps for Infrastructure</p> <p>Software as a Service</p> <p>Portfolio and Vision Re-Visited</p> | <p>Doug Coombs</p> | 30 |

© IBM Corporation 2007. All Rights Reserved.

The workshops, sessions and materials have been prepared by IBM or the session speakers and reflect their own views. They are provided for informational purposes only, and are neither intended to, nor shall have the effect of being, legal or other guidance or advice to any participant. While efforts were made to verify the completeness and accuracy of the information contained in this presentation, it is provided AS IS without warranty of any kind, express or implied. IBM shall not be responsible for any damages arising out of the use of, or otherwise related to, this presentation or any other materials. Nothing contained in this presentation is intended to, nor shall have the effect of, creating any warranties or representations from IBM or its suppliers or licensors, or altering the terms and conditions of the applicable license agreement governing the use of IBM software.

References in this presentation to IBM products, programs, or services do not imply that they will be available in all countries in which IBM operates. Product release dates and/or capabilities referenced in this presentation may change at any time at IBM's sole discretion based on market opportunities or other factors, and are not intended to be a commitment to future product or feature availability in any way. Nothing contained in these materials is intended to, nor shall have the effect of, stating or implying that any activities undertaken by you will result in any specific sales, revenue growth or other results.

IBM, the IBM logo, Lotus, Lotus Notes, Notes, Domino, Domino.Doc, Sametime, WebSphere, FileNet, Workplace, WebSphere, Lotusphere, QuickPlace, and Quickr are trademarks of International Business Machines Corporation in the United States, other countries, or both.

Java and all Java-based trademarks are trademarks of Sun Microsystems, Inc. in the United States, other countries, or both.

Microsoft and Windows are trademarks of Microsoft Corporation in the United States, other countries, or both.

Other company, product, or service names may be trademarks or service marks of others.



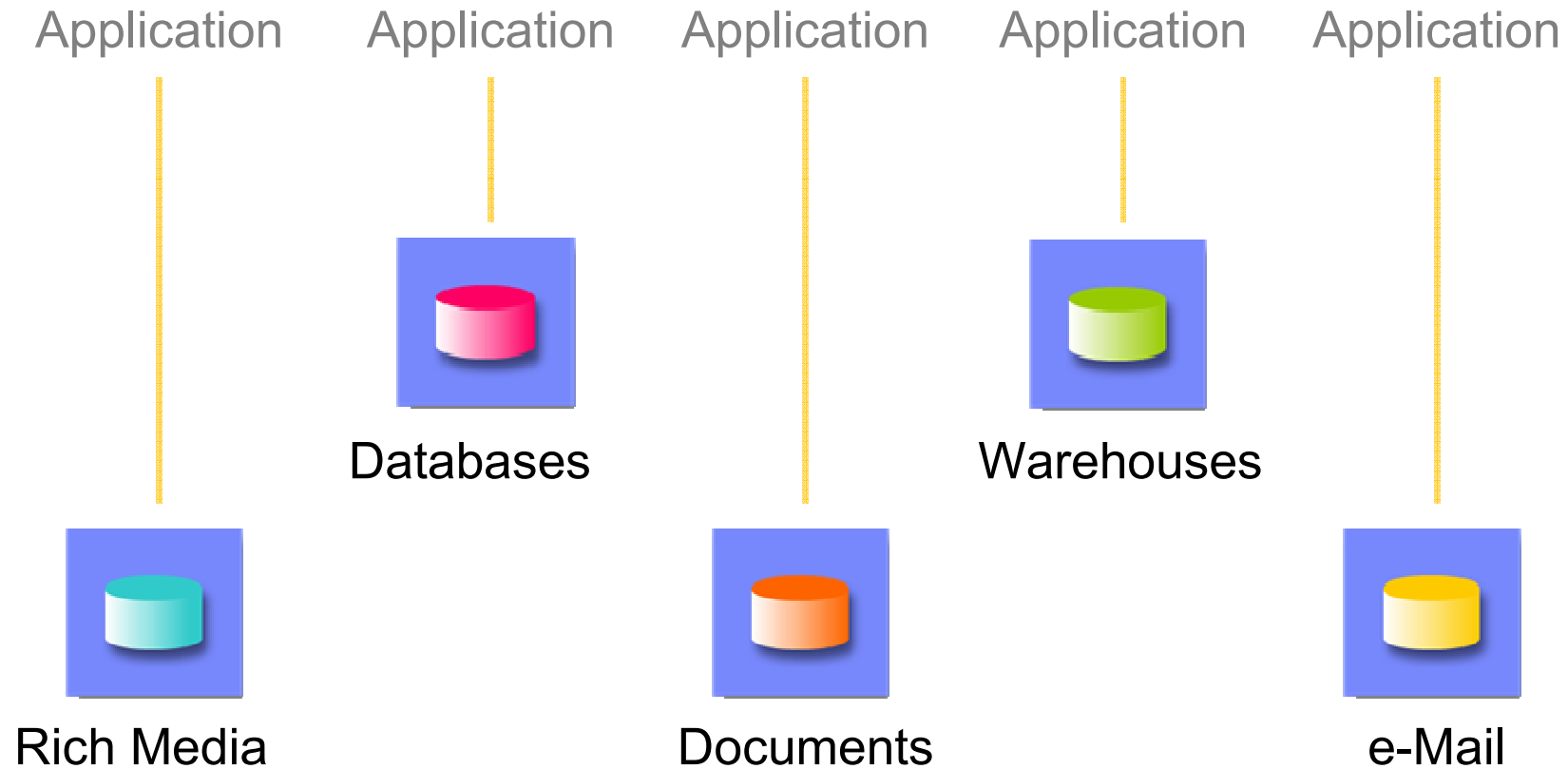
IBM ECM Process Technologies

Daniel Crow
EMEA ECM Product Marketing
Process Technologies

Information Management software

Information On Demand: *Delivering information in context to optimize business processes, applications and productivity...*

Individual Applications & Processes



Information On Demand: *Delivering information in context to optimize business processes, applications and productivity...*

People, Processes, Applications



Information On Demand



Who thinks BPM is a key priority in 2007?



Note: Multiple responses allowed.
 Data: InformationWeek Research Outlook 2007 study of 300 business technology professionals

“85% of the reasons for failure to meet customer expectations are related to deficiencies in systems and process... rather than the employee.

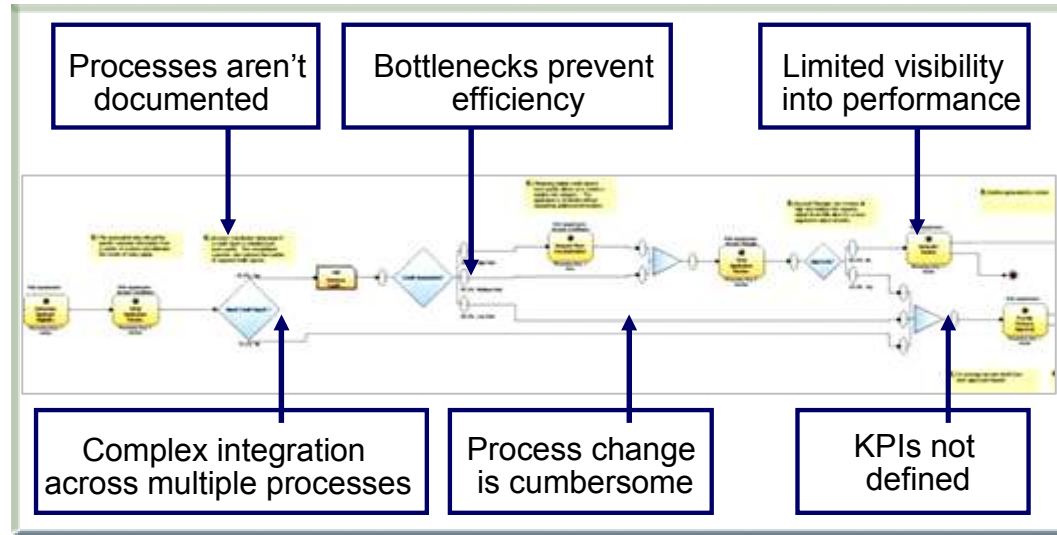
The role of management is to change the process rather than badgering individuals to do better.”

W E Deming.



Business Process Management is a Discipline...

BPM Solves:



BPM Includes:

Integration Modeling Monitoring

Software that Enables BPM

Forms Rules Engine Workflow

Models Process Knowledge Metrics

Expertise that Delivers BPM

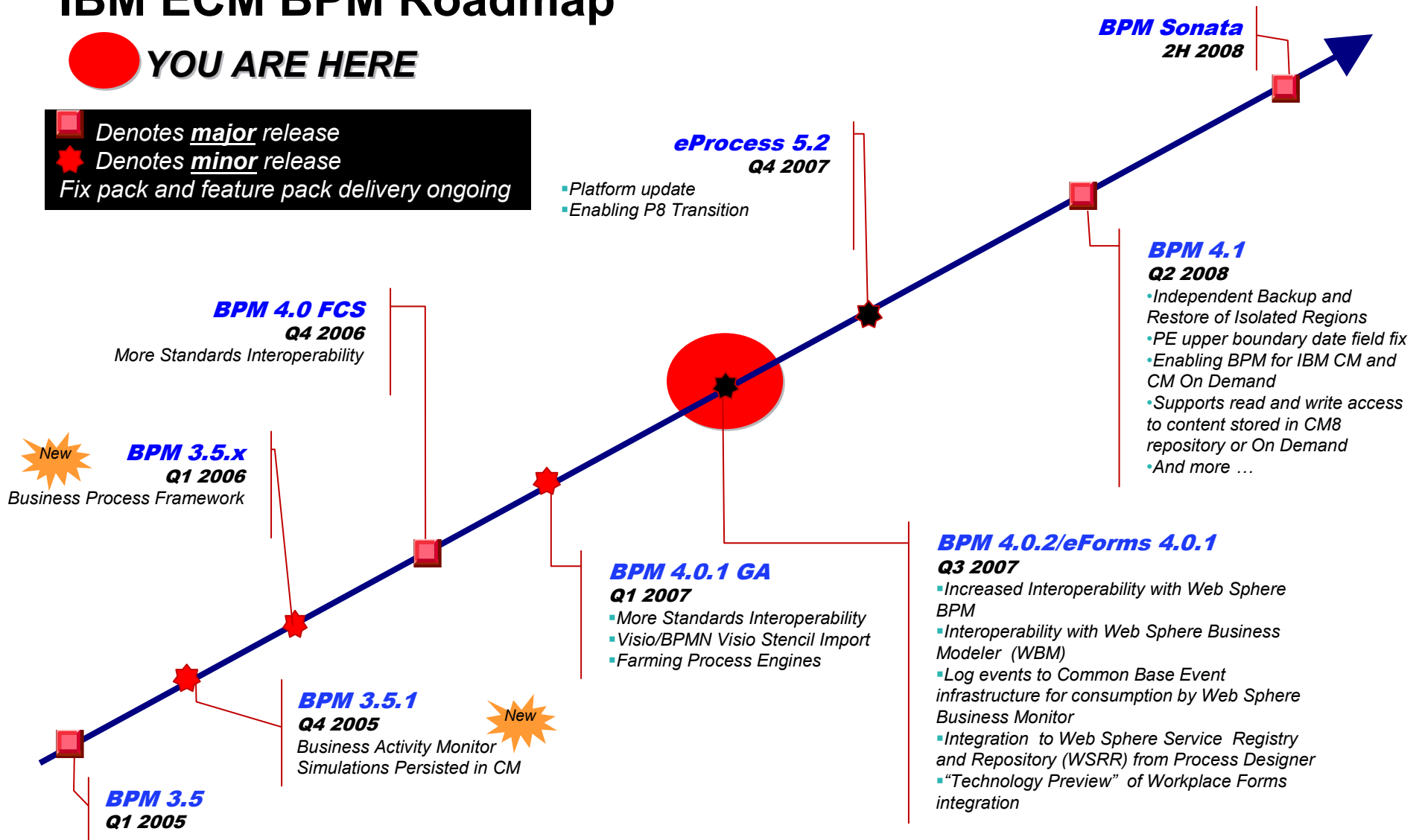
Policies Business Logic Methodology

BPM governs organizational and operational activities

IBM ECM BPM Roadmap

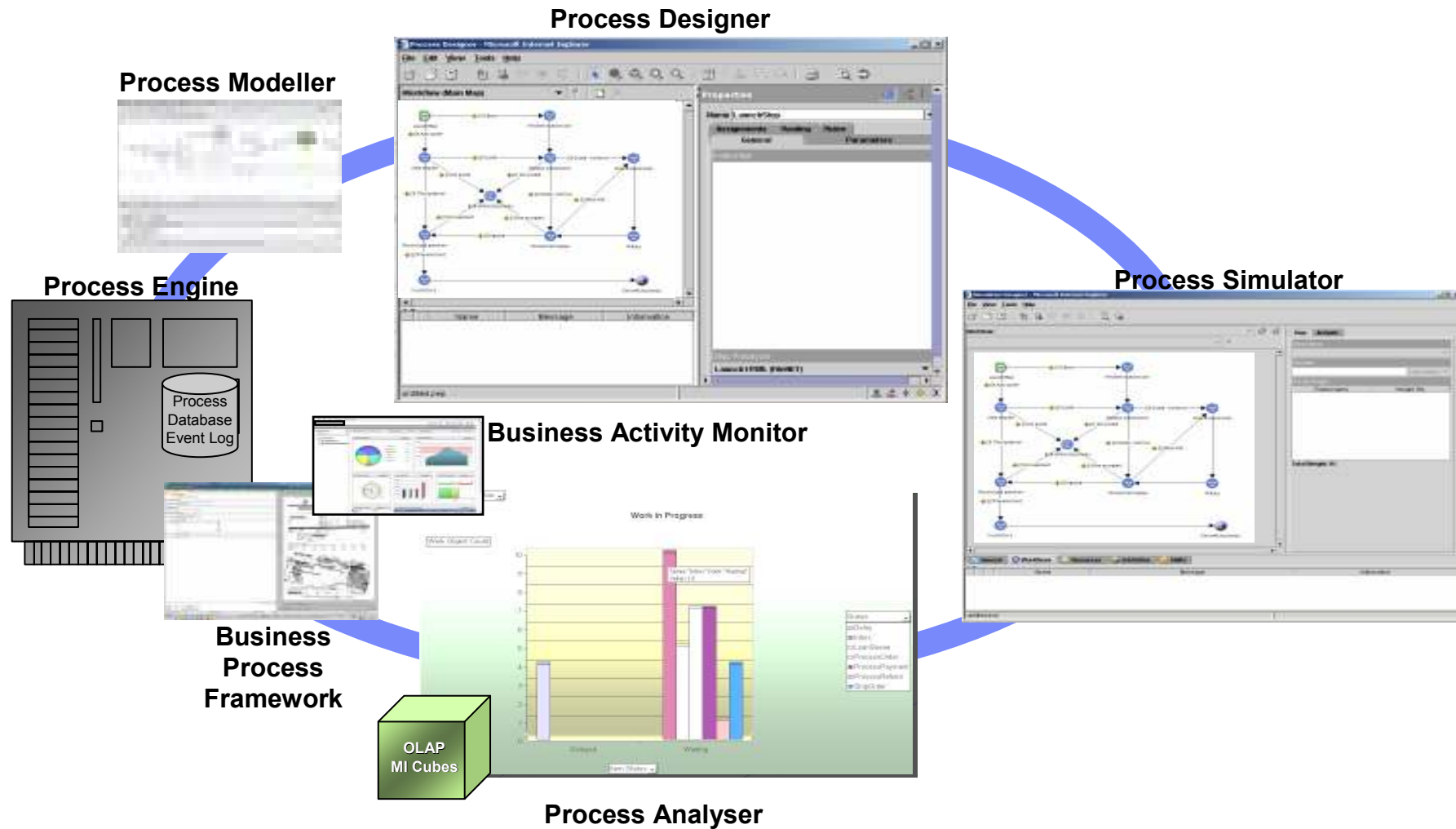
YOU ARE HERE

■ Denotes major release
★ Denotes minor release
 Fix pack and feature pack delivery ongoing



Note: IBM's plans, directions and intent are subject to change or withdrawal

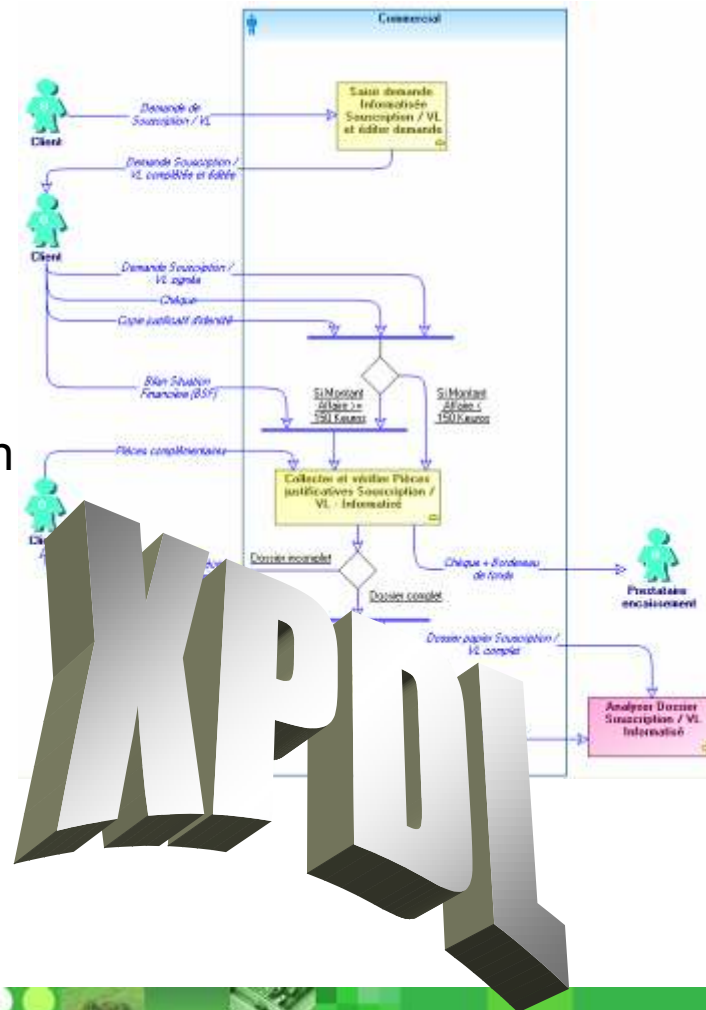
IBM ECM Content Centric BPM



Process Modeling Connectivity Framework

Business Process Automation

- Wide variety of Process Modeling tools available
- Models do not facilitate communication between the Business and IT
- Process models typically don't have direct translation into execution environments
- Lack round trip updates for execution models

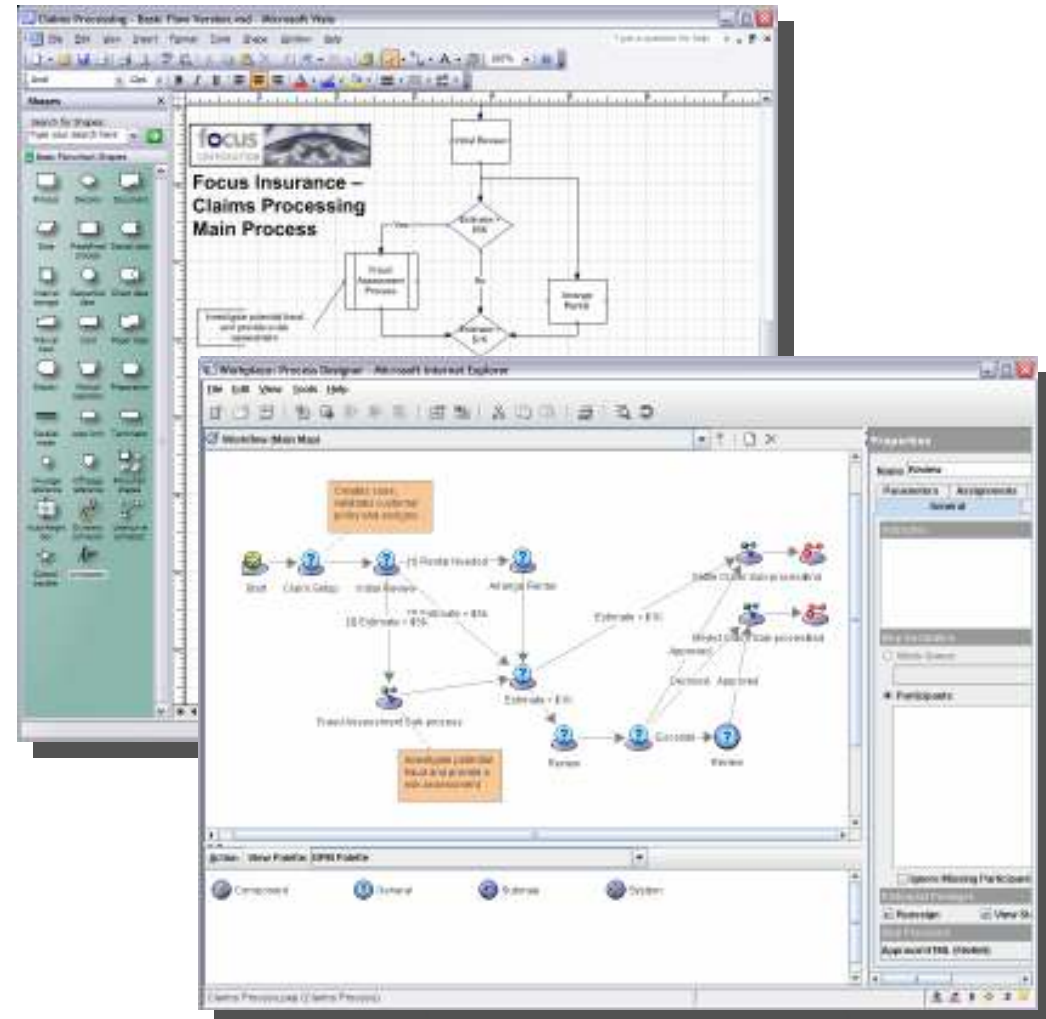


IBM FileNet Connector for Microsoft Visio – BPMN Support

BPMN Support & Import Visio process diagrams

Highlights:

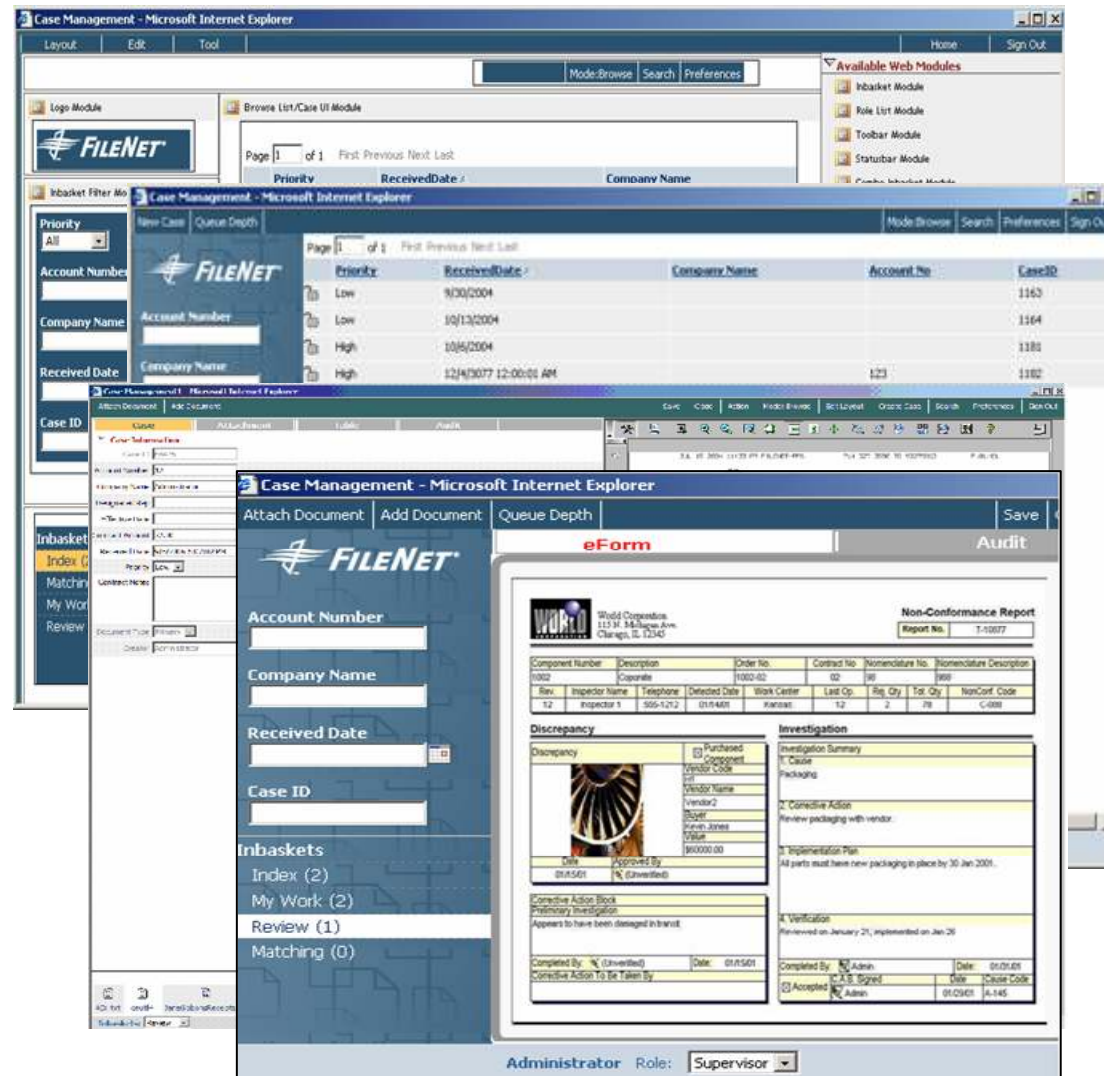
- Mapping of BPMN from Visio to XPDL in Process Designer
- Decrease BPM implementation time
- Organizations often document their processes in Visio
- Out-of-the-box BPMN Template
- BPMN Stencil with complete set of shapes and a BPMN Template



IBM FileNet Business Process Framework (BPF)

Highlights:

- Proven through PS BPM best practices
- The “face” on P8 BPM apps
- Build BPM apps faster; configure instead of code
- Flexible, role-based UI
- Better and richer user experience
- Leverages P8 Process and Content
- Ideal for Case Management apps
- Integrated with eForms
- Java & AJAX based



The screenshot displays the IBM FileNet Business Process Framework (BPF) interface, which is a web-based application for case management. The interface is shown in a Microsoft Internet Explorer browser window. The main window is titled "Case Management - Microsoft Internet Explorer" and features a navigation menu on the left with options like "Inbasket Filter", "Priority", "Account Number", "Company Name", and "Received Date". The central area shows a list of cases with columns for "Priority", "ReceivedDate", "Company Name", "Account No", and "CaseID". A table of cases is visible, with columns for "Priority", "ReceivedDate", "Company Name", "Account No", and "CaseID". The table contains several rows of data, including cases with priorities of "Low" and "High", and received dates ranging from "9/30/2004" to "12/14/2007 12:00:00 AM".

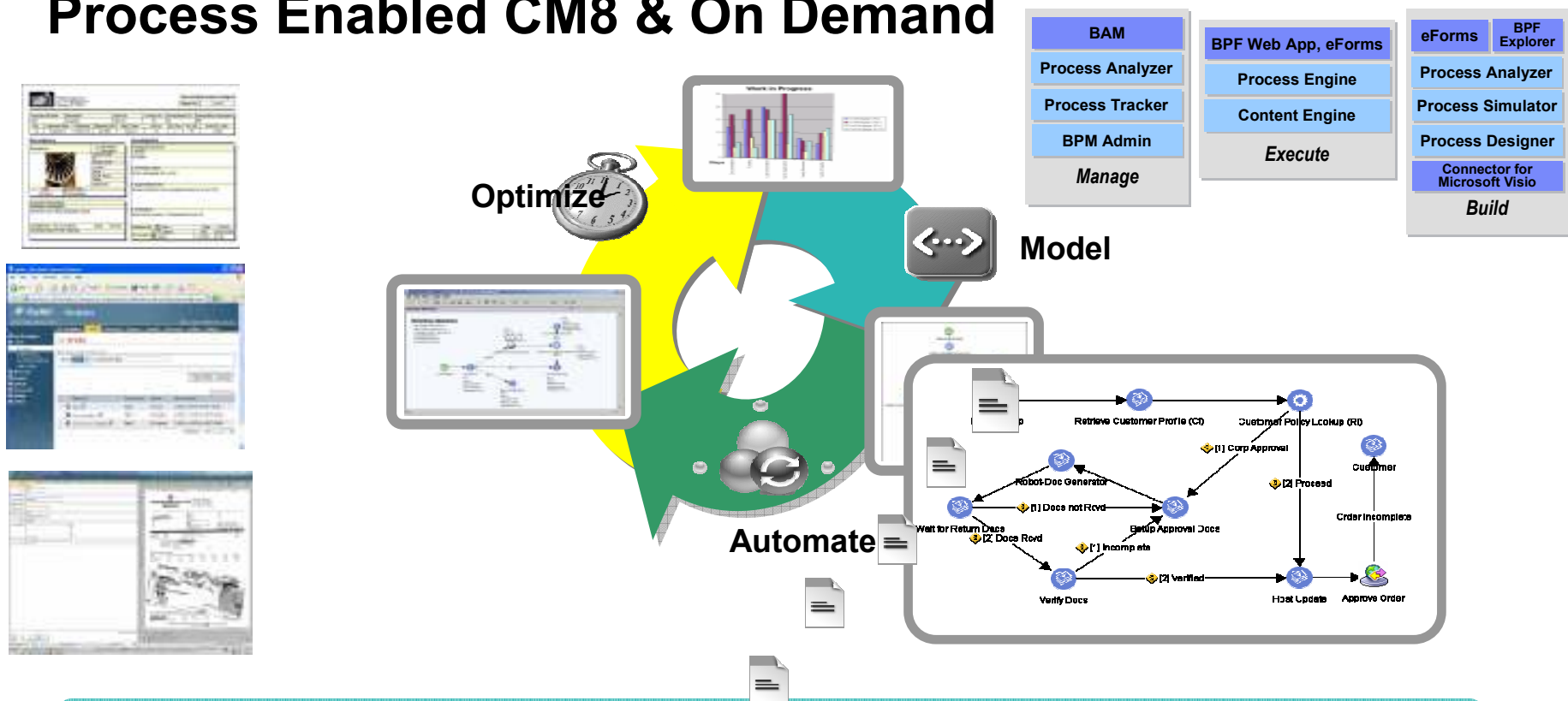
Below the main window, there is a smaller window titled "Case Management - Microsoft Internet Explorer" showing a form for "Non-Conformance Report". The form includes fields for "Account Number", "Company Name", "Received Date", and "Case ID". It also features a table for "Discrepancy" and "Investigation" data. The "Discrepancy" table has columns for "Component Number", "Description", "Order No", "Contract No", "Nomenclature No", and "Nomenclature Description". The "Investigation" section includes a "Discrepancy" table with columns for "Date", "Approved By", and "Investigation Summary". The "Investigation Summary" section includes a "Discrepancy" table with columns for "Date", "Approved By", and "Investigation Summary". The "Investigation Summary" section includes a "Discrepancy" table with columns for "Date", "Approved By", and "Investigation Summary".

The interface also shows a sidebar with "Inbasket" and "Index" options, and a bottom status bar indicating the user's role as "Administrator" and "Supervisor".

Q3 2007 – ECM eForms 4.0.1

- Policy configuration enhancements for improved functionality and design flexibility with BPM
 - Bidirectional mapping of form columns to workflow data field arrays
 - Direct mapping to workgroup participants
- Extension of current Date format to support time
 - Improved mapping to DateTime datatype in BPM
- OpenClient eForms (OCeF) migration tool
- Technology preview of Lotus Forms integration
- API Exposed
 - Server Side Java API
 - Client Side JavaScript API

Process Enabled CM8 & On Demand



BPM Content Federation / Integration

Repositories

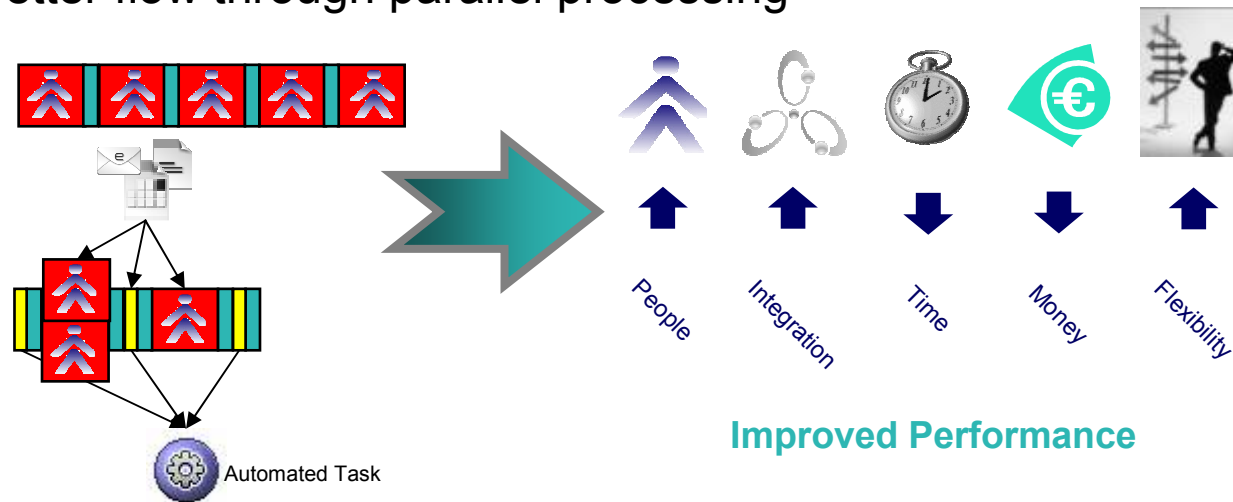
- IBM CM**
- IBM Domino**
- IBM FileNet**
- Other**

So Why is Process Important to Content?

- **Task time** - the time between the beginning and end of a task
- **Transfer time** - the time between the end of one task and the beginning of the next task.

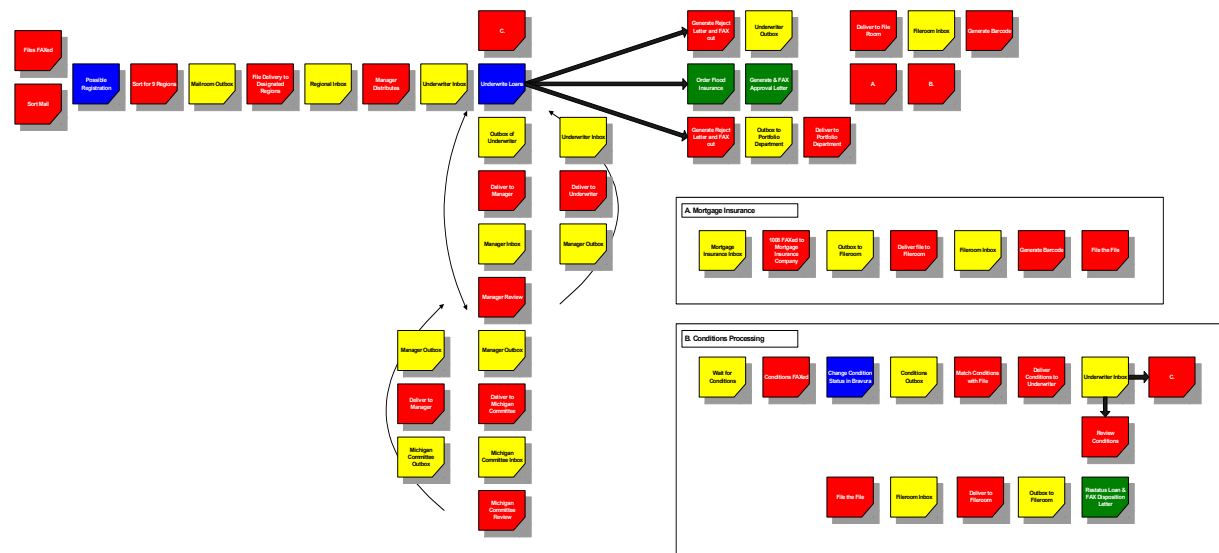


- Process and Content technologies removes transfer time (waste)
- Enables better flow through parallel processing



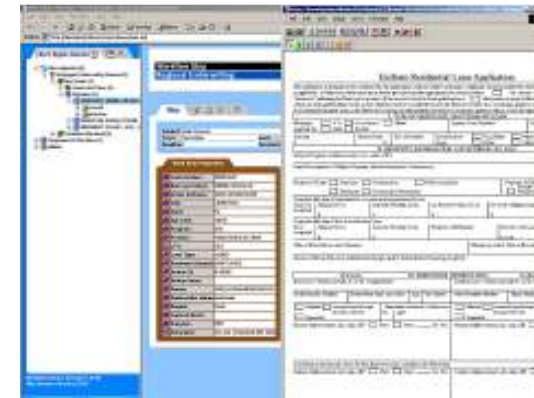
Actual Customer Process: Loan Origination

- Requires human intervention
- Semi-automated activity
- Fully automated activity
- Process latency

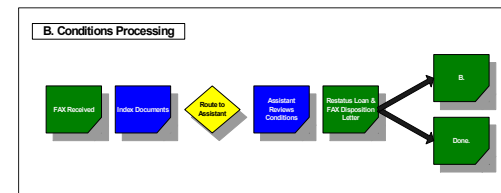
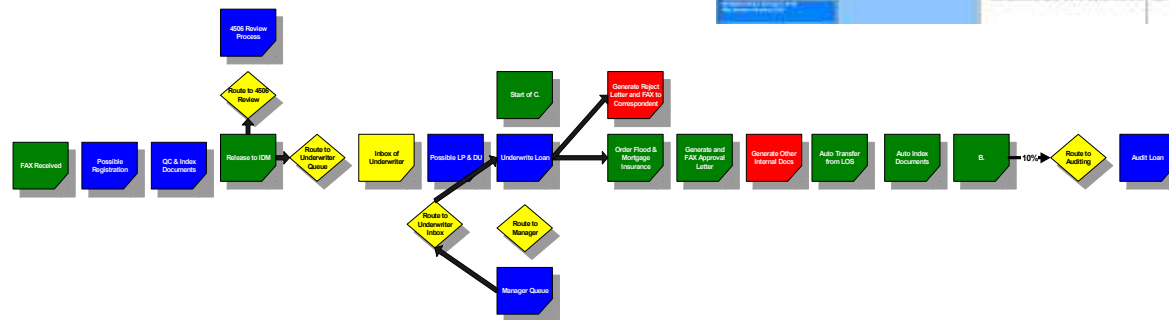


Initial customer process for origination...

Competitive Advantage: Delivered...

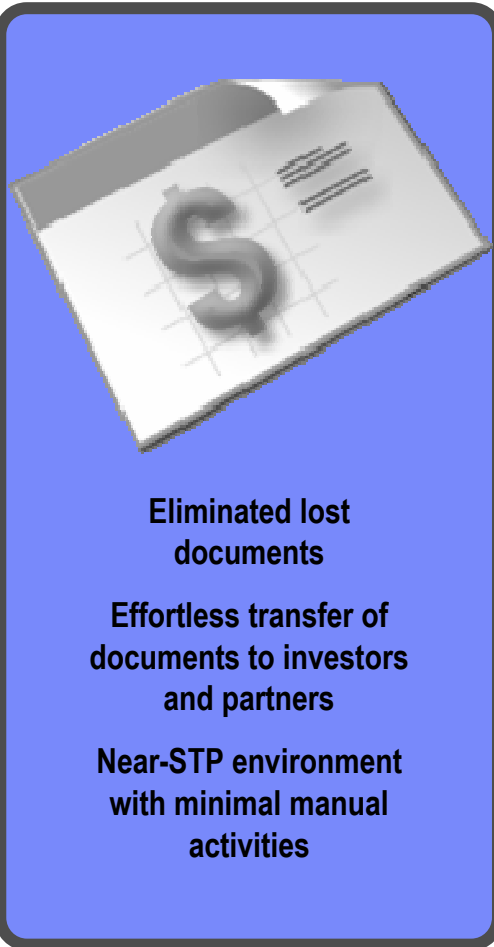


- Requires human intervention
- Semi-automated activity
- Fully automated activity
- Process latency



Revised business process after IBM Content Centric Processing

Competitive Advantage: Delivered... Superior Business Results



- 76% cost savings, over \$50 M per annum
 - Process reduced from 7 days to 48 hours
 - Processing cost reduced from \$250 to \$60 per loan
- Decrease in processing time and headcount
 - Supports a 400% increase in volume of originations
- All parties including clients have access to information and are involved in the process



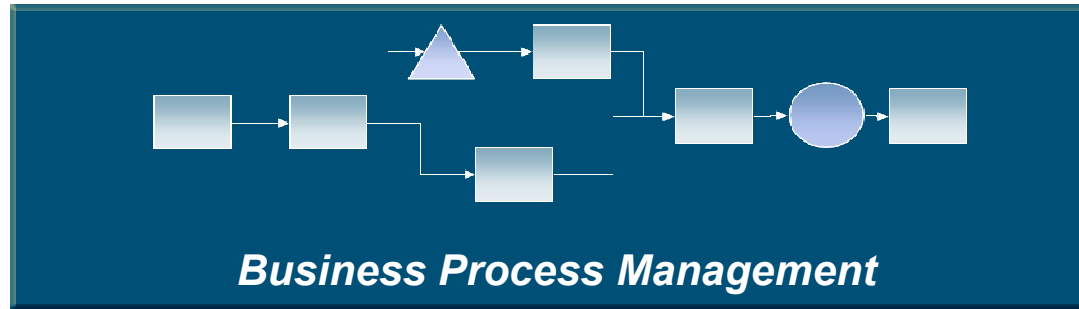
IBM ECM Process Technologies

IBM BPM Strategy
Where does WebSphere fit?

Information Management software



Customers can start BPM in different ways



Modeling & Simulation

Design and simulate business processes



Business Activity Monitoring

Track performance, processes and operational activity using key performance indicators



Process Choreography

Choreograph processes across applications and systems



Rules and Pre-built Frameworks

Manage process rules and accelerate design and implementation time

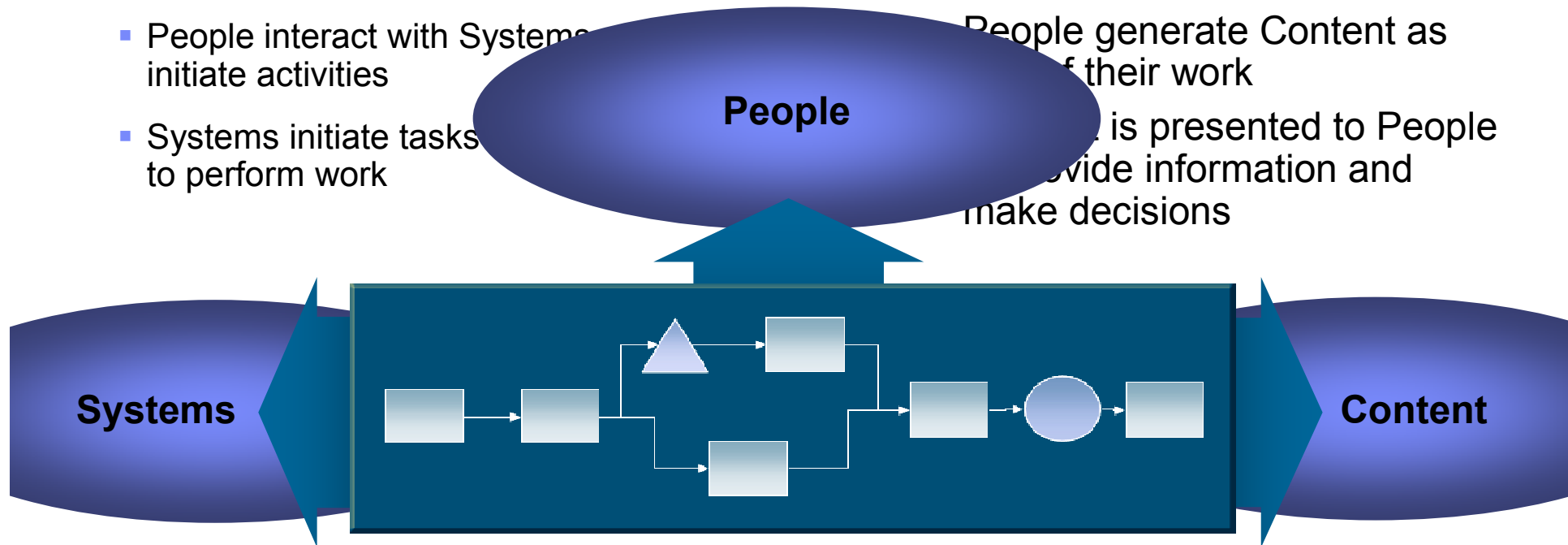


Content Centric Processing

Manage processes where content is used as input for a decision or produced as the output

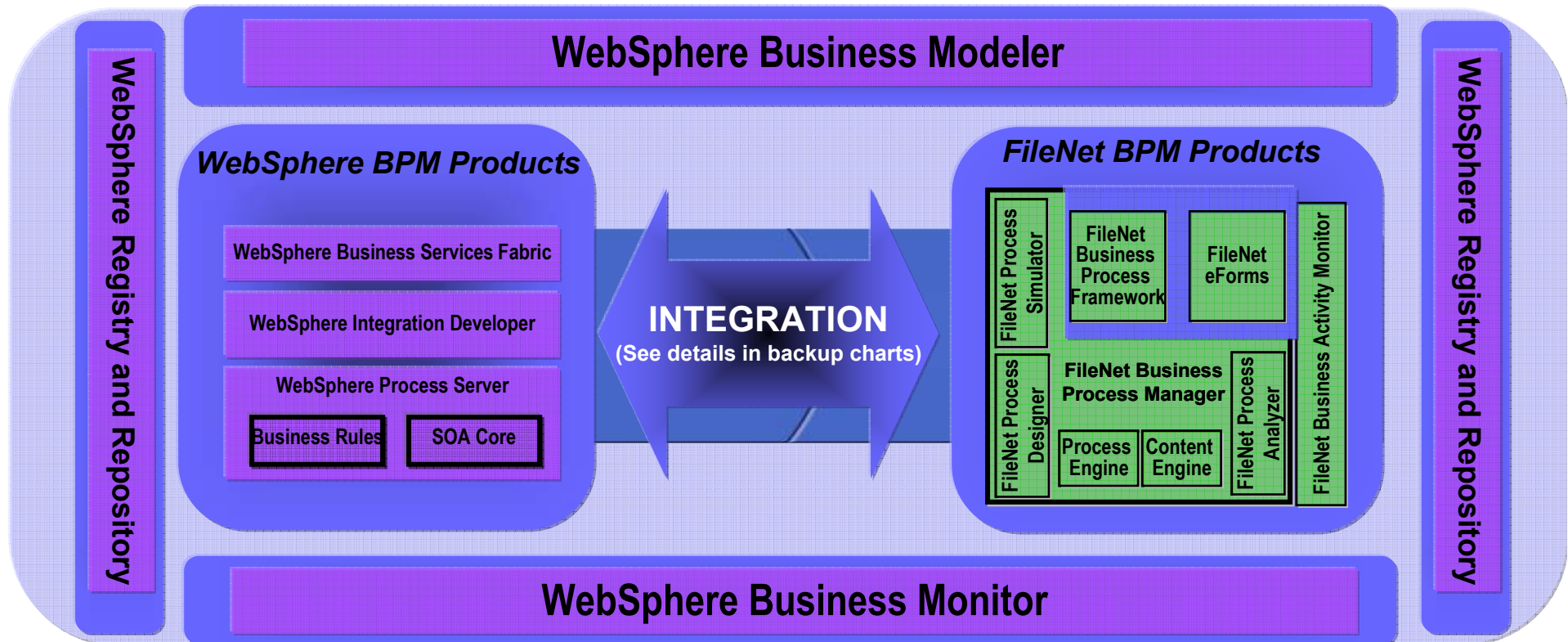
How to Manage the Interaction of People, Systems, and Content in Your Business Processes

- People interact with Systems and initiate activities
- Systems initiate tasks and provide information to perform work
- People generate Content as a result of their work
- Content is presented to People to provide information and make decisions



- Synchronize Content between Systems
- Systems generate Content as their process work

Only IBM can deliver the value across full BPM capabilities



Across companies, their processes cover the spectrum of system, applications and content

- Order to cash; Insurance claims; Exception handling
- Employee on-boarding; Complaint tracking; Six Sigma
- Records management; Account updates; Inventory automation

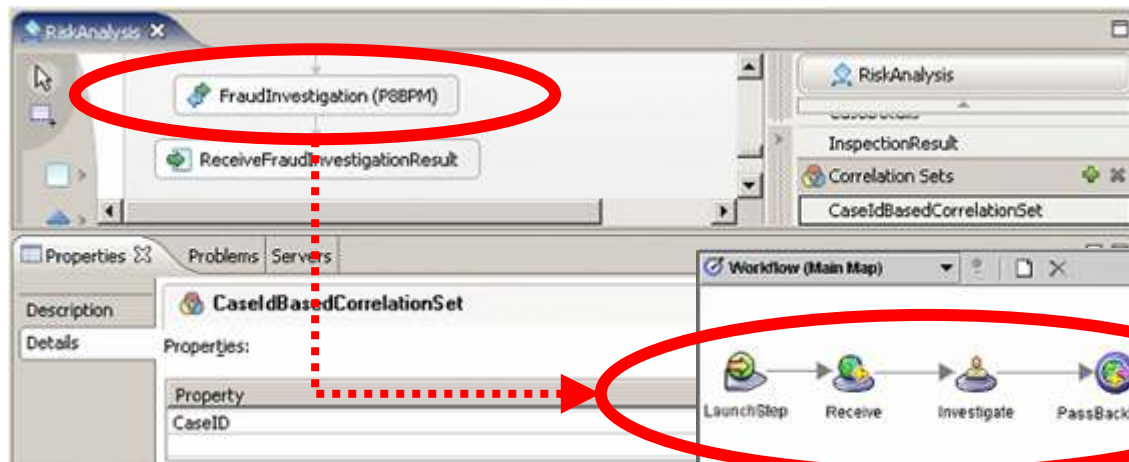
IBM ECM BPM + WebSphere Integration Objectives

- Leverage the strengths of both BPM Portfolios
- Customers Benefits
 - Use a single tool for stand-alone modeling
 - Create processes that span across both BPM suites
 - Use WSRR as common repository for SOA implementations
 - Use WebSphere Monitor for BAM needs

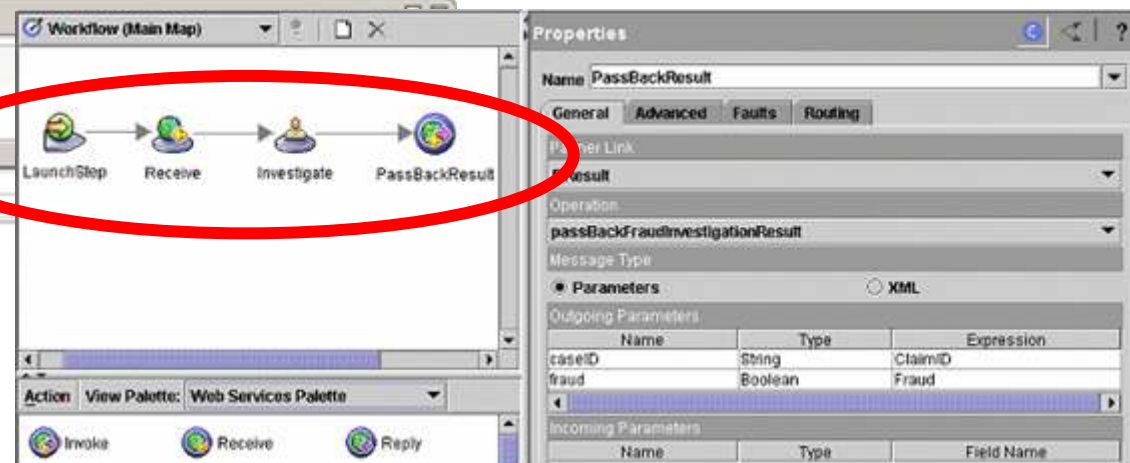
Process Engine Interoperability – PE and WPS

- Bi-directional ability for a process running in one process engine to invoke a process in the other process engine to leverage key product capabilities

WebSphere Integration Developer



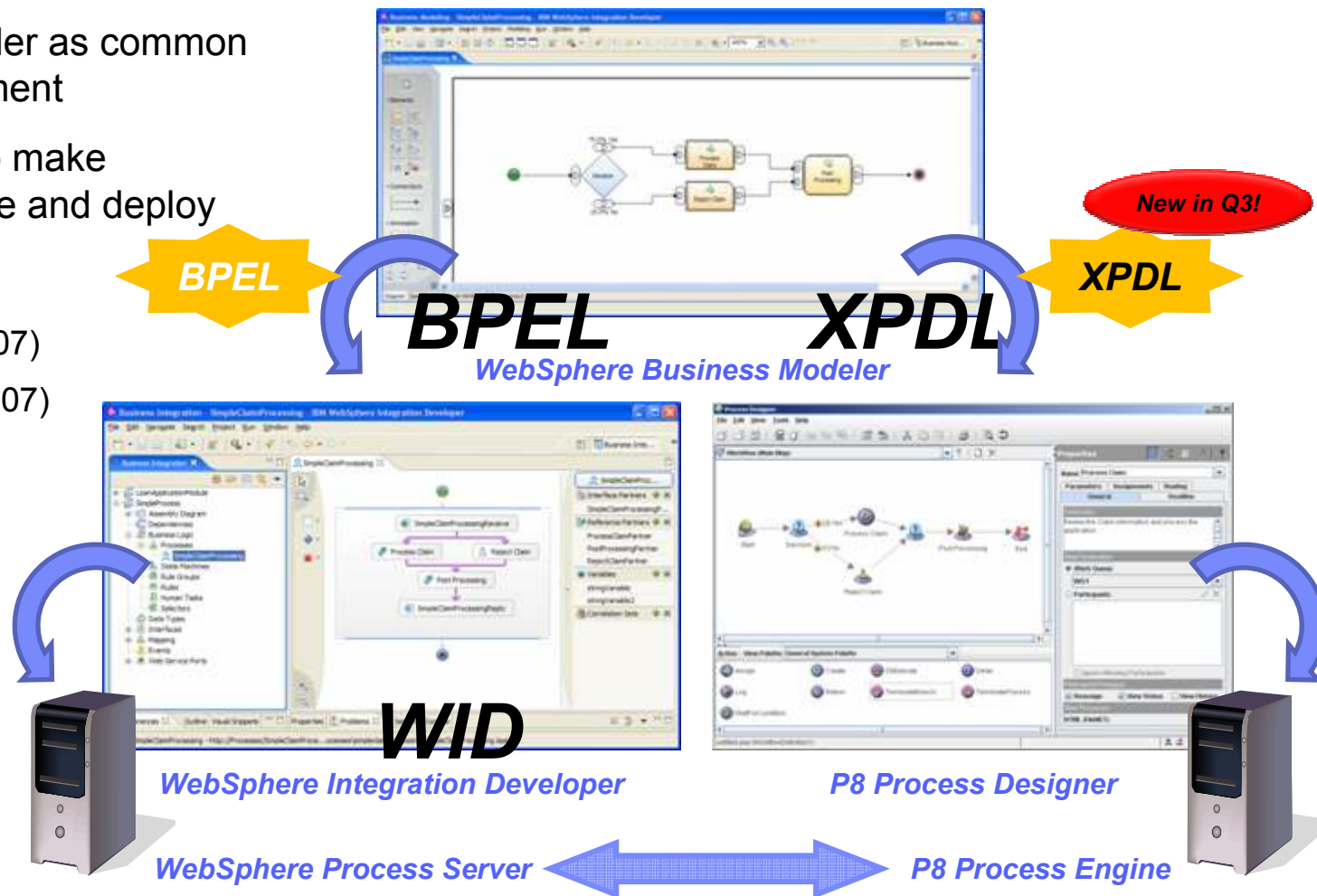
P8 Process Designer



- Demonstrated at IOD 2006
- P8 BPM 4.0.1 (2Q07)
 - Improved WSDL support
- P8 BPM 4.0.2 (3Q07)
 - Improved schema support

WebSphere Modeler Integration with P8 BPM

- WebSphere Modeler as common modeling environment
- Use native tools to make process executable and deploy
- Release plan
 - Initial release (2Q07)
 - P8 BPM 4.0.2 (3Q07)
 - Complex data type support



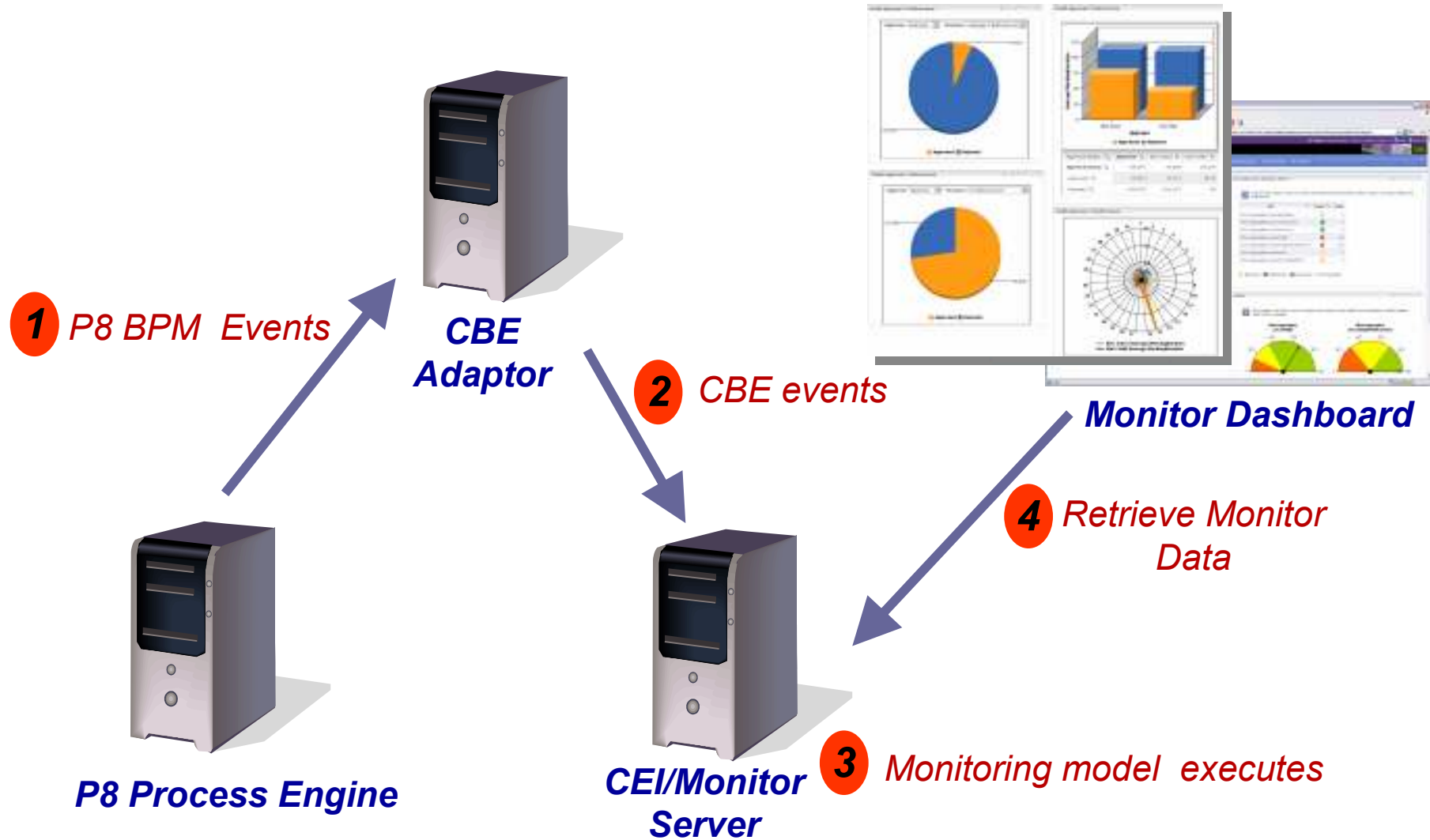
Modeling for Different Goals

- Modeling For Compliance/Documentation
 - Graphical view of as-is business
 - Compliance requirement to document processes (Sarbanes-Oxley and Basel II)
 - Modeling for Monitoring KPIs
- Modeling For Redesign
 - Document as-is and to-be state to perform Return on Investment (ROI) analysis
 - E.g. Six Sigma
- Modeling For Execution
 - Process Automation via process engines

WebSphere Monitor Integration

- Similar capabilities as IBM FileNet BAM
 - Monitor the work in progress
 - OOTB dashboard
 - Alert if KPI threshold is exceeded
 - OOTB measures for:
 - Work load, queue load, process time, and idle time
 - OOTB dimensions to slice & dice:
 - Workflow definition, workclass, queue, activity (step), user
 - Extensible with business data

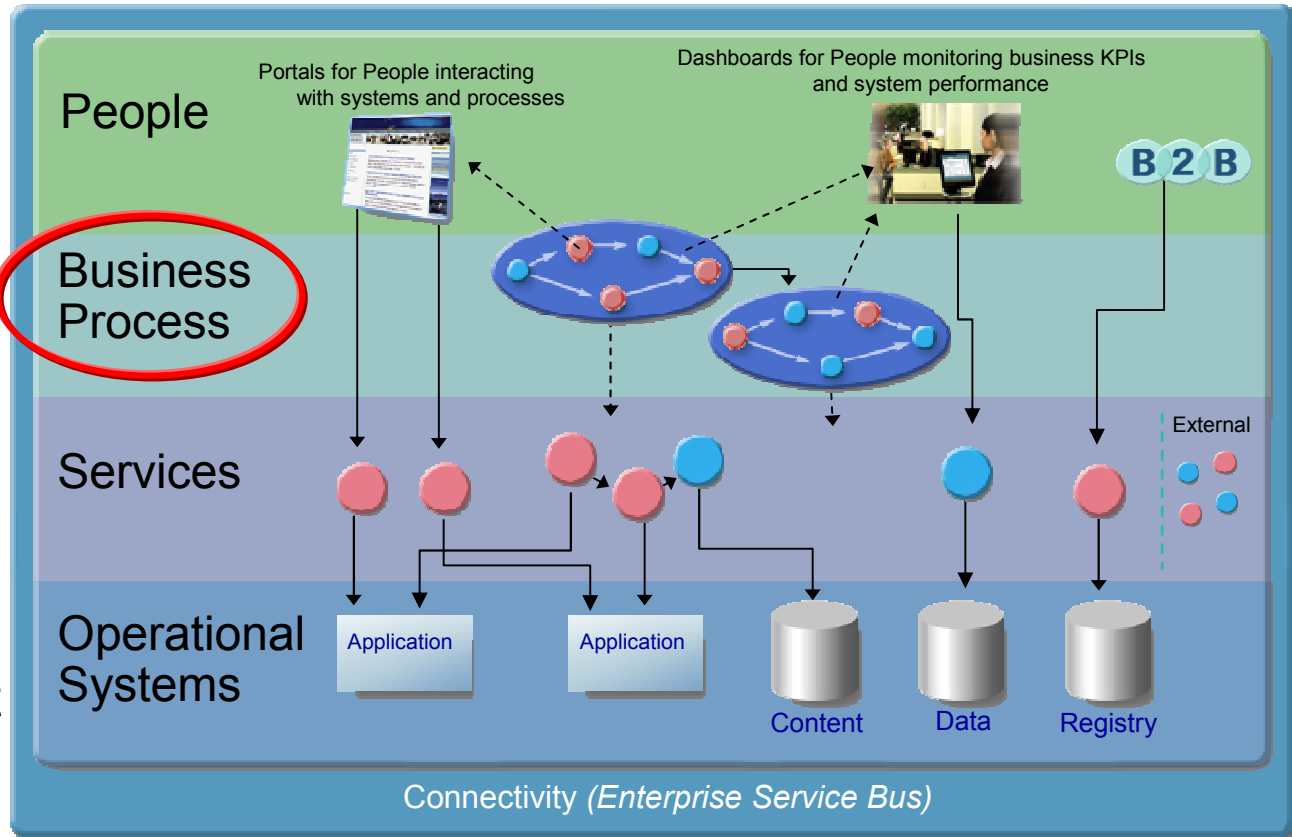
Run Time Operation



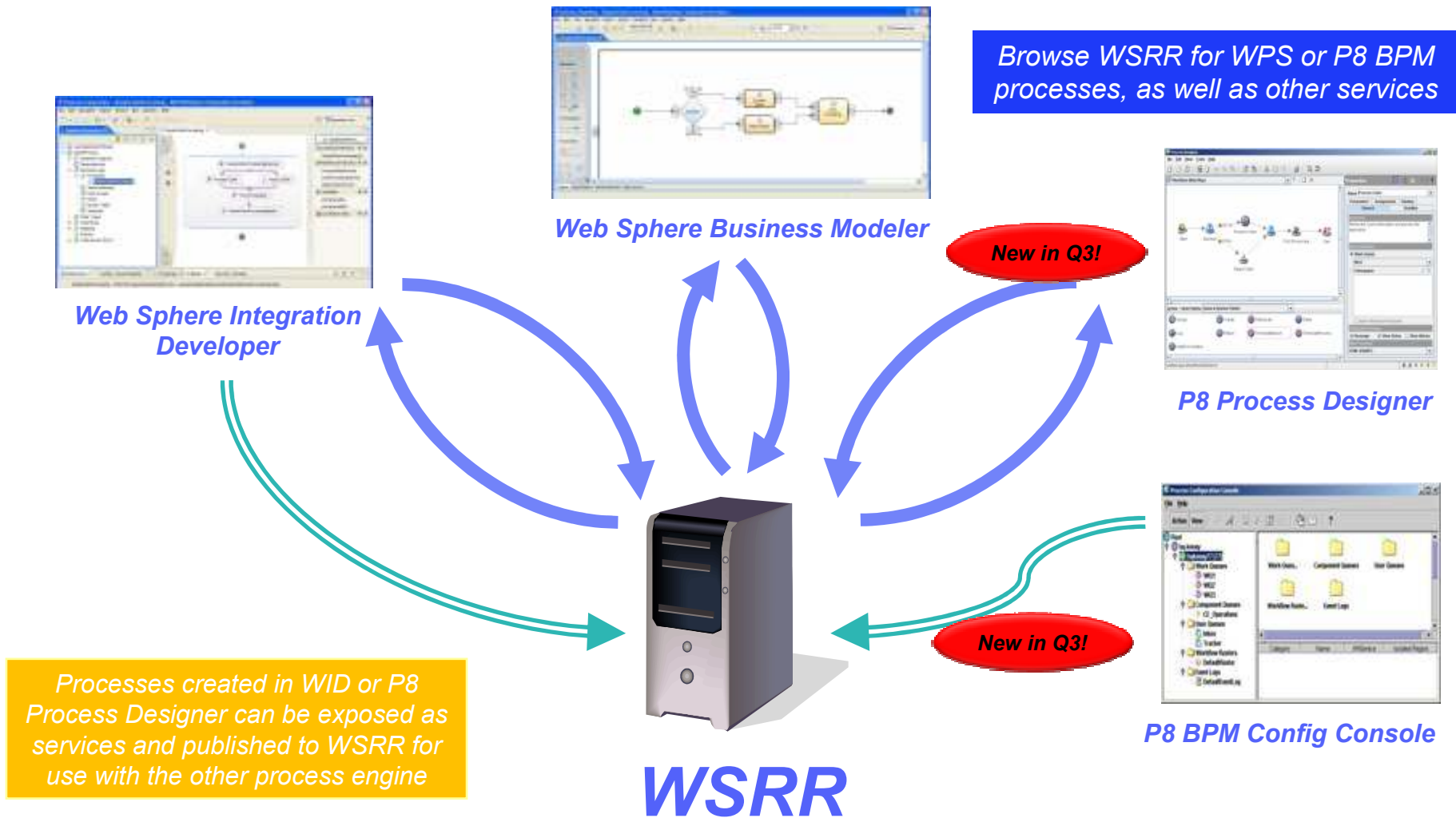
Alignment Of Business & IT

SOA improves how you design, manage, and optimize your business processes by enabling:

- Solution Building Efficiency
- Reuse of Existing Assets
- Flexibility in Change
- IT/Business Alignment



Common Service Registry and Repository with WSRR for both FileNet BPM and Web Sphere BPM

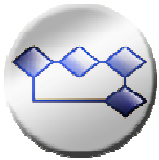


IBM BPM Commitment to Clients and Statement of Direction



IBM will continue to support and invest in WebSphere and FileNet addressing the entire spectrum of BPM requirements.

IBM BPM products will share common tooling and components.



- Recommended in combined deployments:
 - For Tools, WebSphere Business Modeler for modeling and
 - For BAM, WebSphere Business Monitor for monitoring
- IBM has no plans to “replace” either of our core BPM engines at this time as both engines provide distinguished capabilities
- SOA with WSRR as the Common Services Registry & Repository across the BPM portfolio



Increased focus on industry expertise that matters:

– BPM practitioners, best practices, methodology and frameworks



IBM ECM Process Technologies

Thank you

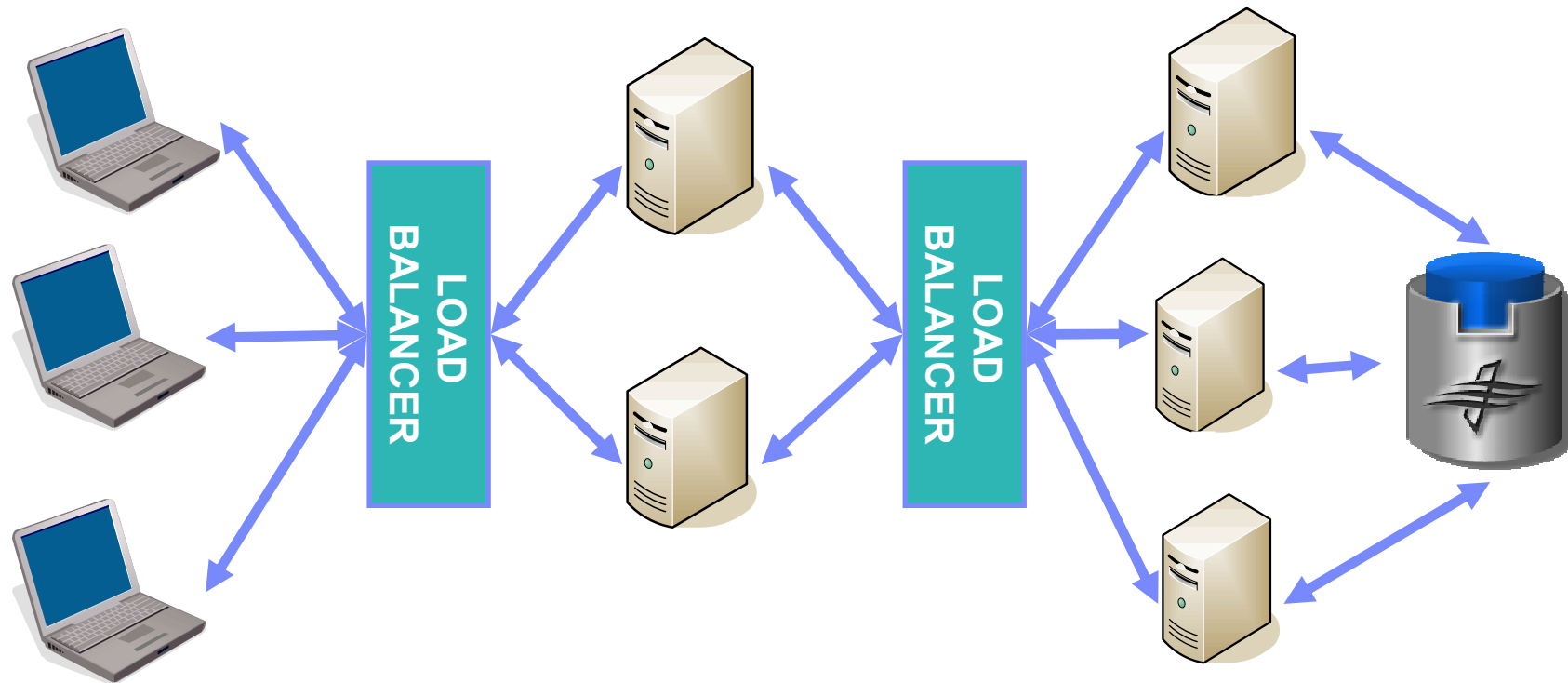
Information Management software



| | | | |
|---------------------|---|-------------------------|-----------|
| Introduction | <p>ECM as part of Information On Demand</p> <p>ECM Maturity and Adoption</p> <p>Current Portfolio position</p> <p>Roadmap</p> <p>Vision for ECM</p> | <p>Doug Coombs</p> | <p>30</p> |
| Content | <p>The Changing Market for Content Management</p> <p>The Role of ECM in Collaboration</p> <p>ECM user interface for the desktop and the web</p> <p>Advanced Search and Analytics</p> | <p>Thorsten Zoerner</p> | <p>60</p> |
| Process | <p>Activating Content and Business Process Management</p> <p>The Roadmap for Content Centric Process Tools including product demonstrations</p> <p>IBM Business Process Management Strategy</p> <p>What's next for Process?</p> | <p>Daniel Crow</p> | <p>60</p> |
| Compliance | <p>Control and Enforcement</p> <p>Product positioning, roadmap and demonstrations for records and email</p> <p>Classification for ECM</p> <p>What are eDiscovery and the ECM framework for compliance?</p> | <p>Graham Hadingham</p> | <p>60</p> |
| Platform | <p>The Repository Roadmap and Federation</p> <p>Next Steps for Infrastructure</p> <p>Software as a Service</p> <p>Portfolio and Vision Re-Visited</p> | <p>Doug Coombs</p> | <p>30</p> |

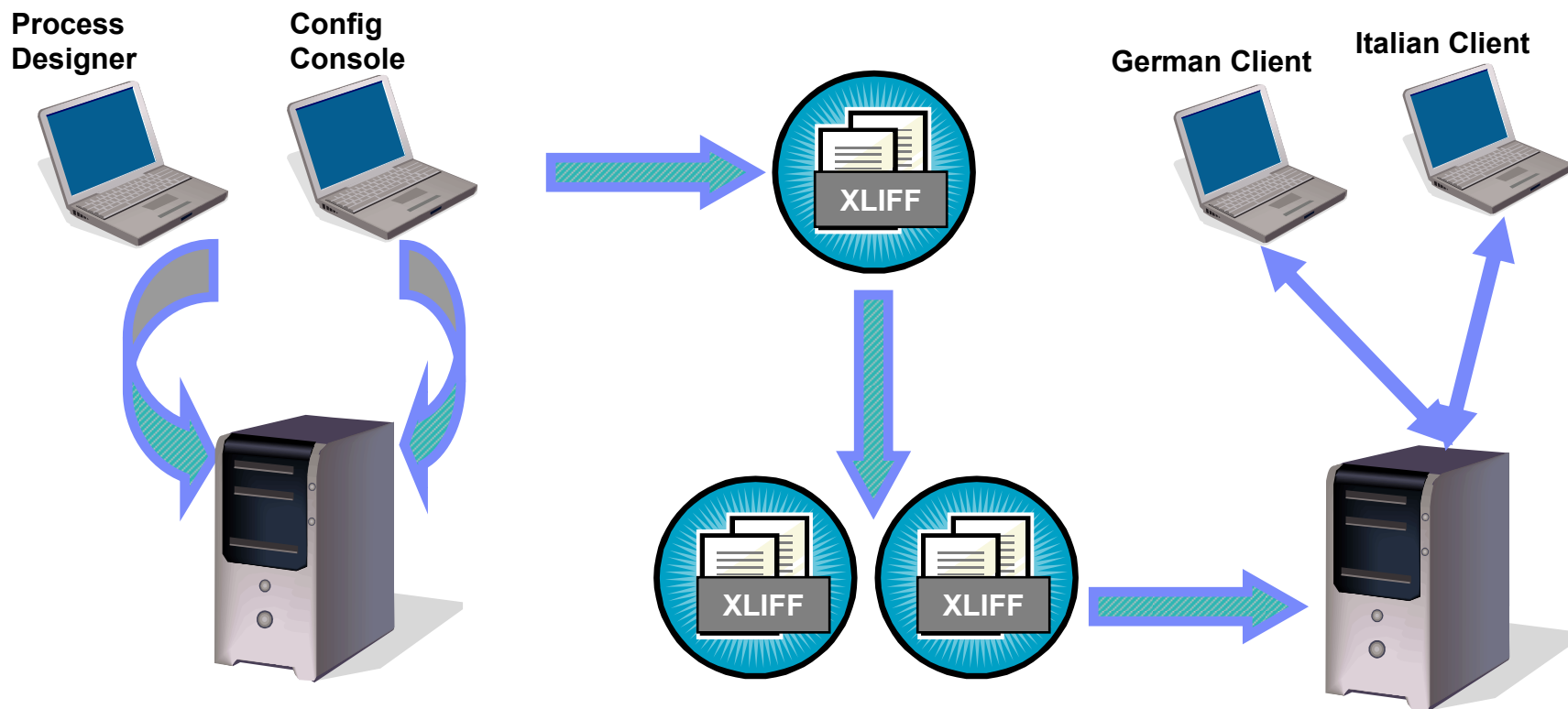
High Availability, Recovery & Scalability in BPM 4.0

- High-availability solution through farming – server clusters
- Cost effective means to increase processing capacity
- Optimum disaster recovery configuration
- No impact to the existing client applications



Multi-Lingual BPM Applications in BPM 4.0

- Steps within an app in different languages and locales
- Fully localized and improved user experience; email in local language
- Addresses globalization issues





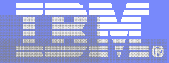
Transition to P8

Information Management software



Our Commitment to Clients

- Investment in existing solutions and products preserved and enhanced
- Focus on interoperability will enable organizations to leverage current and future investments
- Commitment to open environments



IBM ECM PRODUCT VISION

Flexible User Interfaces

Portals Content-Enabled Applications Composite Applications Collaboration

Business Process Management Services

Enterprise Workflow **Content Centric Processing** Integration **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

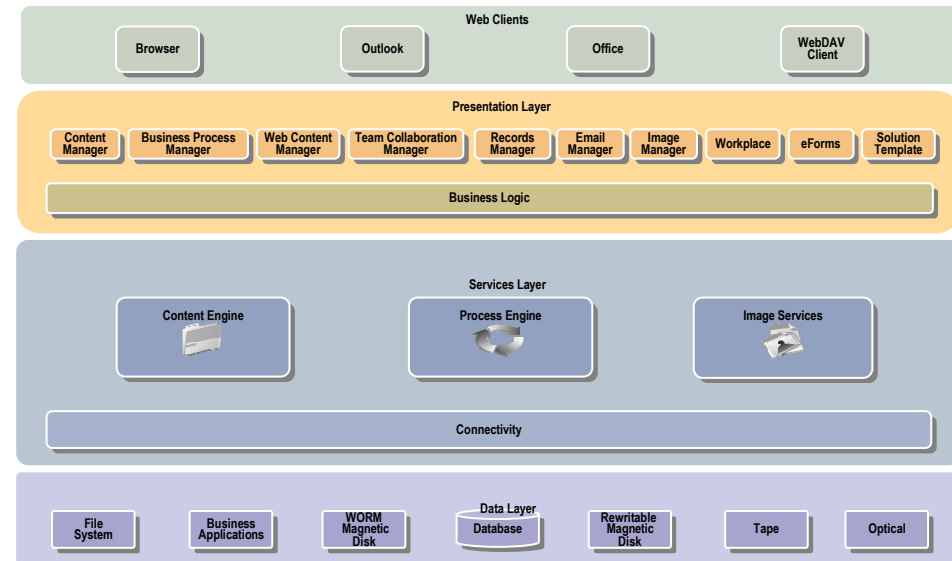
Repositories

Data Servers IBM Other Storage

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

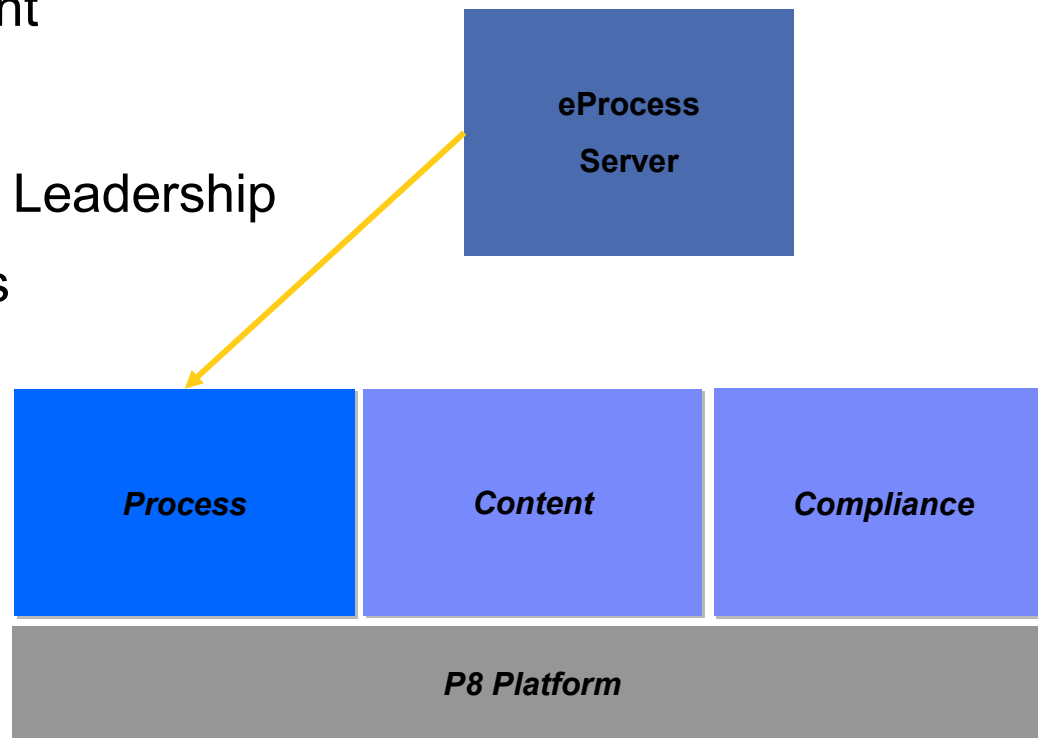
P8 Platform Architecture Characteristics

- Distributed and Layered Architecture
- Highly Scalable
- Leveraging J2EE App servers
- Enabling SOA
- Enabling .NET
- Open Security
- Web-based Applications
- Support to Open Standards
 - SOAP, XML, HTTP, HTML, BPMN, XPDL ...

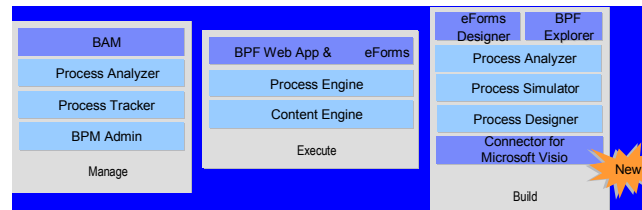


Key Business Motivations

- Powering content with process
- Protect Current Investment
- Transition to P8 enables
 - Innovation and Product Leadership
 - Flexible User Interfaces
 - Lower TCO



P8 BPM Functionality

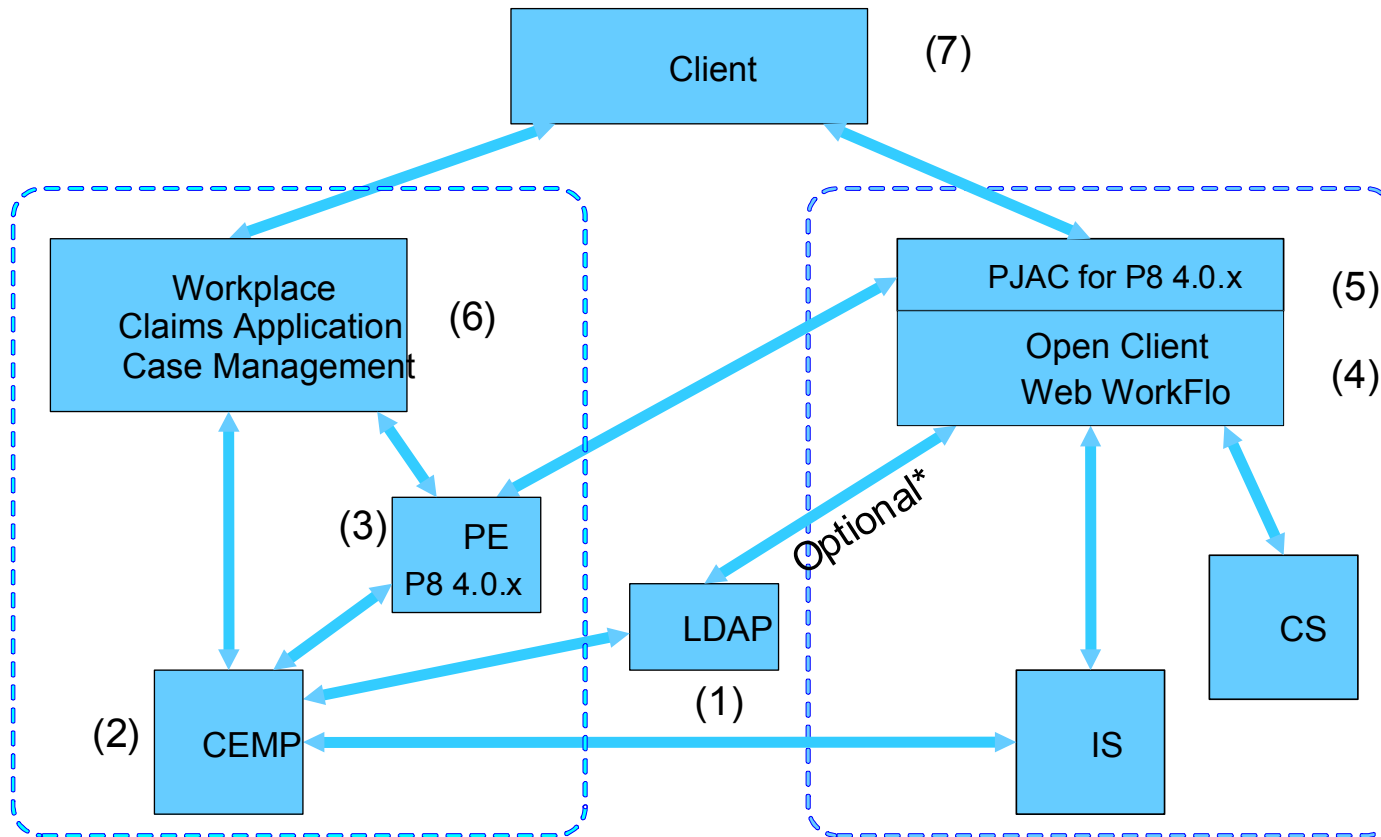


- **Process Definition**
 - Annotations
 - Workflow Collections
 - BPM Standards
 - XPDL
 - BPMN
 - Validation Error Navigation
 - Terminate/Terminate Branch
- **Application Integration**
 - Message Queues
 - Web Services and Process Orchestration
- **Process Deadlines and Step Deadlines**
- **Content Integration**
 - Attachments
 - Content Event Synchronization
- **J2EE Application Servers**
 - Web Sphere
 - WebLogic
- **Security**
 - LDAP
 - SSO and JAAS support
- **WebSphere BPM Interoperability**
 - WBI Modeler
 - WBI Monitor
 - WSRR
- **Rules Connectivity Framework**
- **Farming**
 - Cluster servers for scalability & high availability
- **Multilingual**
 - Applications manifest in different languages
- **Process Simulation**
 - Process simulations
 - Cost based analysis
 - Import live metrics
- **Process Analysis**
 - Simulation Integration
- **Business Activity Monitoring**
 - Monitoring and Alerting
 - Integration with Process Analytics
- **Business Process Framework**
 - Layout Designer
 - eForms integration

Take Advantage of new P8 BPM Capabilities!

Hybrid Environment

Relationships between components after transition



*Used for LDAP Authentication from the Web Application

Upgrade Defined

- **In general**

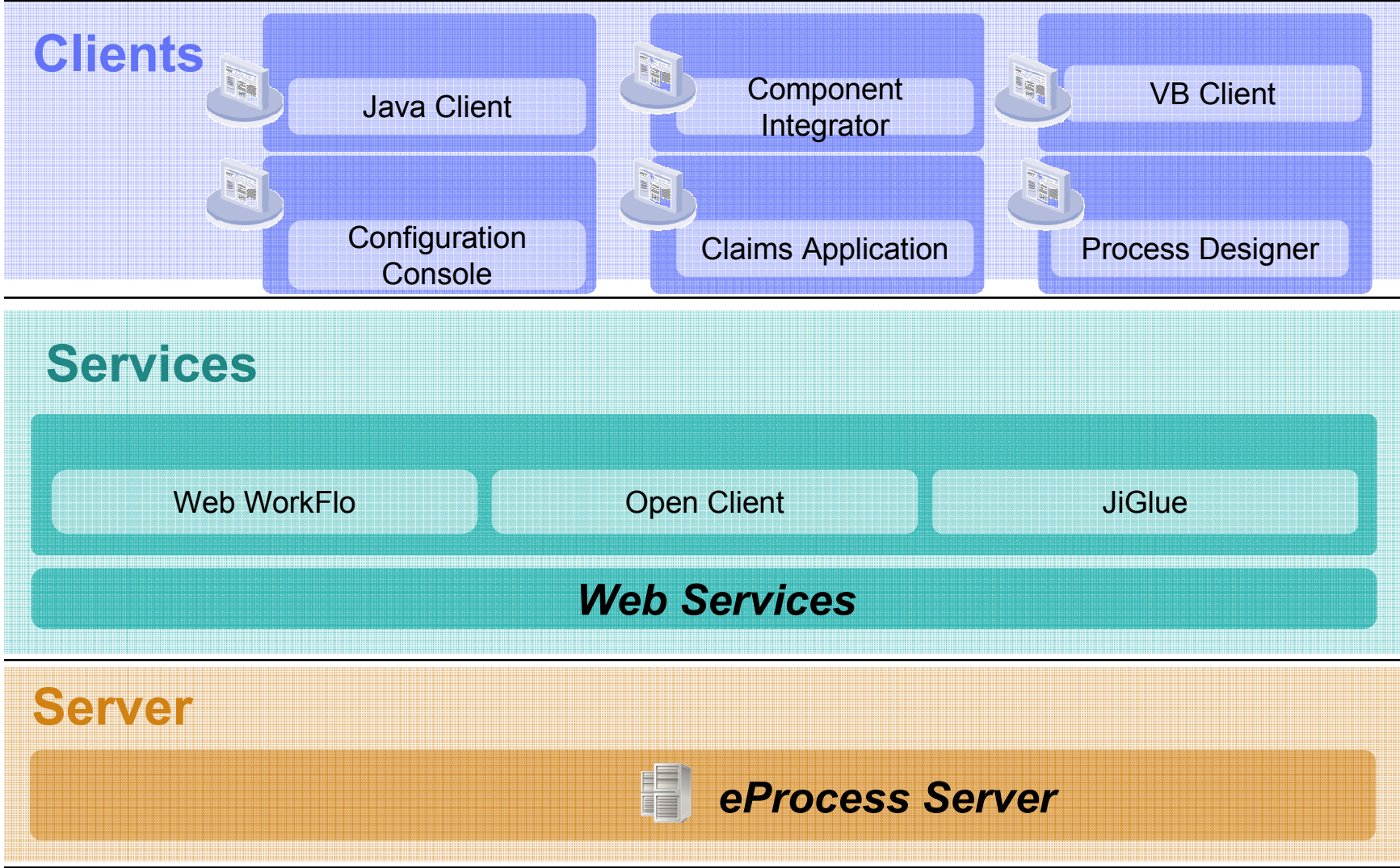
- “An ‘upgrade’ is when you replace a product with a newer version of that same product.”

- **In this context**

- Application of software to move from an older eProcess Server release to a newer release
- Application of software to move from an older Process Engine Server to a newer release

Plan on transitioning from eProcess Server to P8 BPM!

eProcess Server with Web WorkFlo and Open Client



Use Scenario I – Hybrid P8 BPM with PJAC

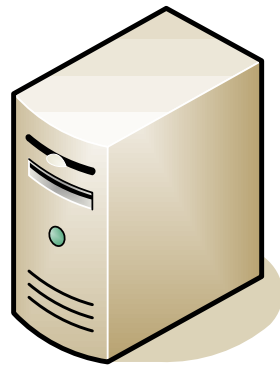
- Dual Access

- ACME company has a Claims application built on eProcess using documents stored in Image Services (IS) and Content Services (CS). The company will move to P8 BPM; they anticipate that this will occur over a period of 12 to 13 months. This requires the continued use of the Claims application during that period.

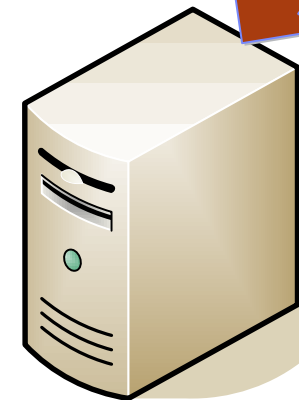
Who Can Use the Transition Component?

IF YOU ARE HERE...

YOU NEED TO GET HERE



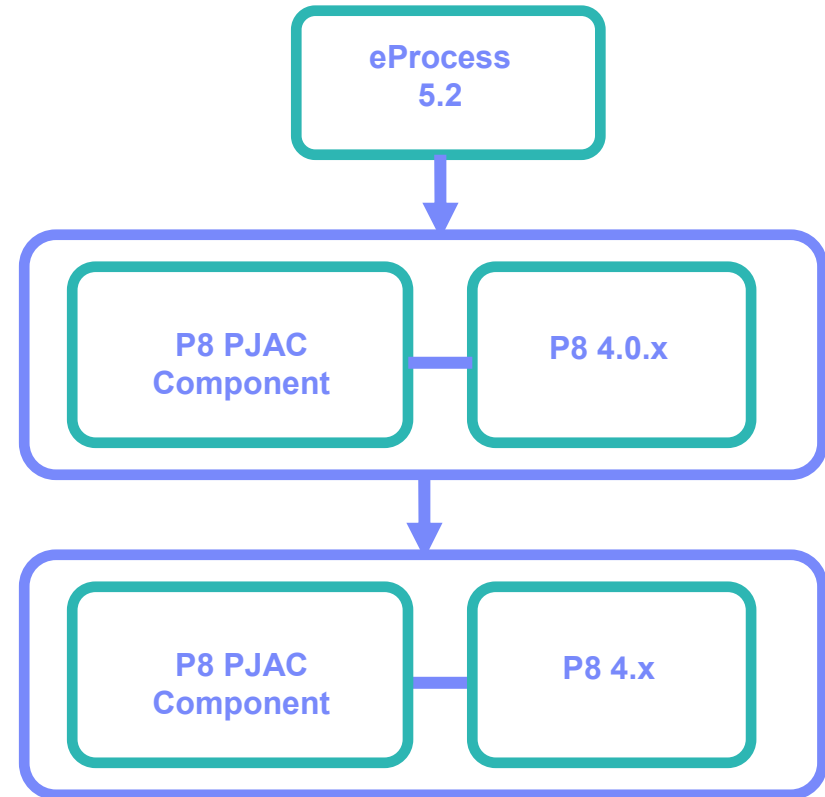
eProcess 4.2.x
eProcess 5.0
eProcess 5.1.0



eProcess 5.2

P8 Releases with Transition Component

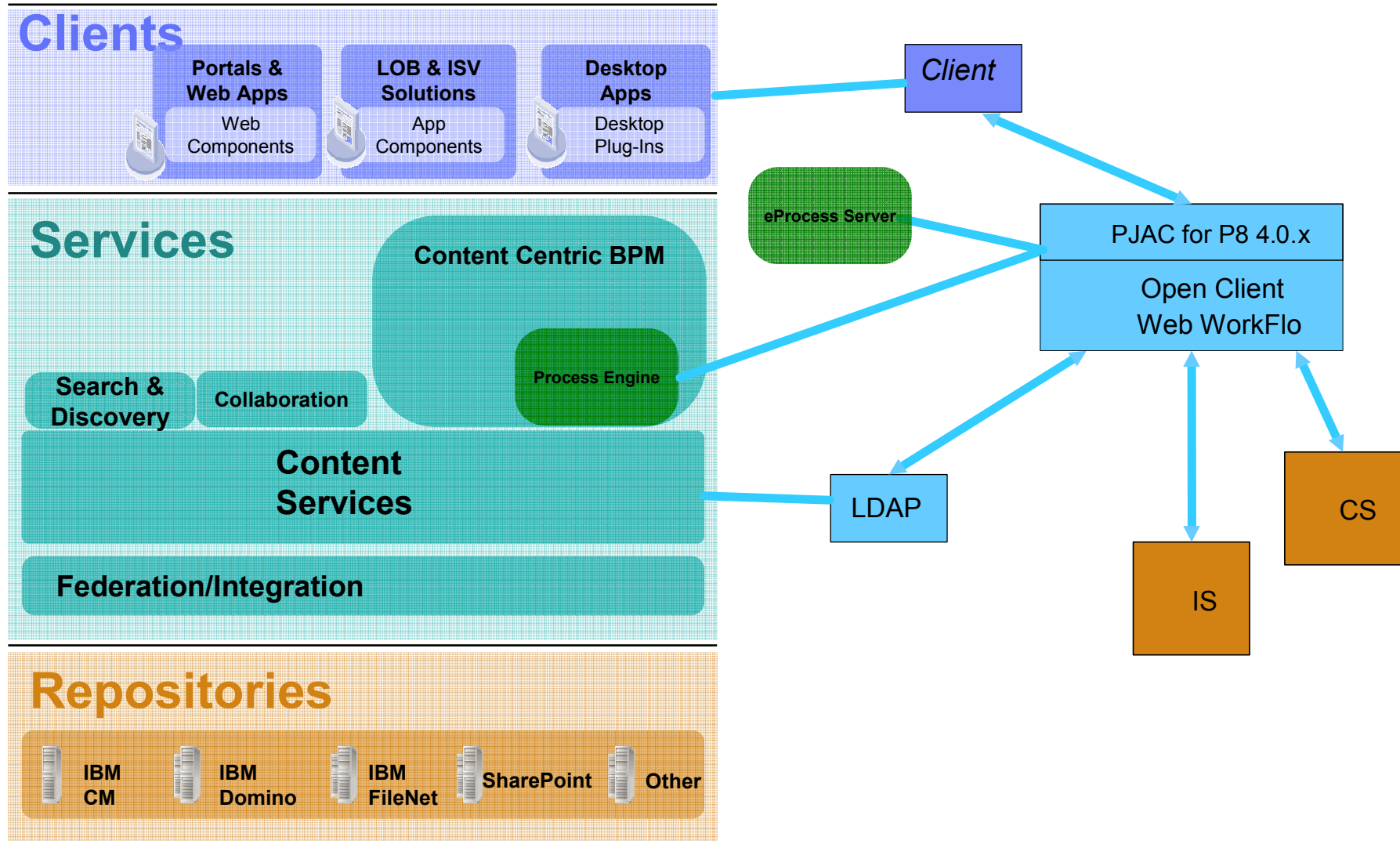
- Specific P8 PJAC component will be released with each of the 4.0.x and 4.x releases



Benefits of Transition

- Convert eProcess Workflow Server to P8 Process Engine *with all active work intact!*
- Single Common Process Engine for eProcess Apps and P8 BPM Apps
- Transition to P8 incrementally
 - eProcess and P8 inbox show same items
 - No need to 'move' work
 - Show all work irrespective of where it was initiated from
 - 'Correct' step processor loaded automatically regardless of web server (P8 or eProcess)
 - Use P8 inbox to process existing and new eProcess work
 - When P8 system comes online new work will automatically show up
- Take advantage of P8 BPM tools on eProcess Apps
 - Simulation on processes designed using eProcess

Hybrid P8 BPM with PJAC



Transition Procedure

- Separate IS from Process Engine
- Export users/groups from Workflow Server Security database and import into LDAP
- Install P8 Content Engine and Application Engine
- Transition the Process Engine
- Upgrade and/or patch Web Services / Open Client
- Enable and configure LDAP on all Web Servers
- Install P8 PJAC and configure all Web Servers
- Set up Connection Points on CE/AE
- Migrate custom applications

Capabilities and Support

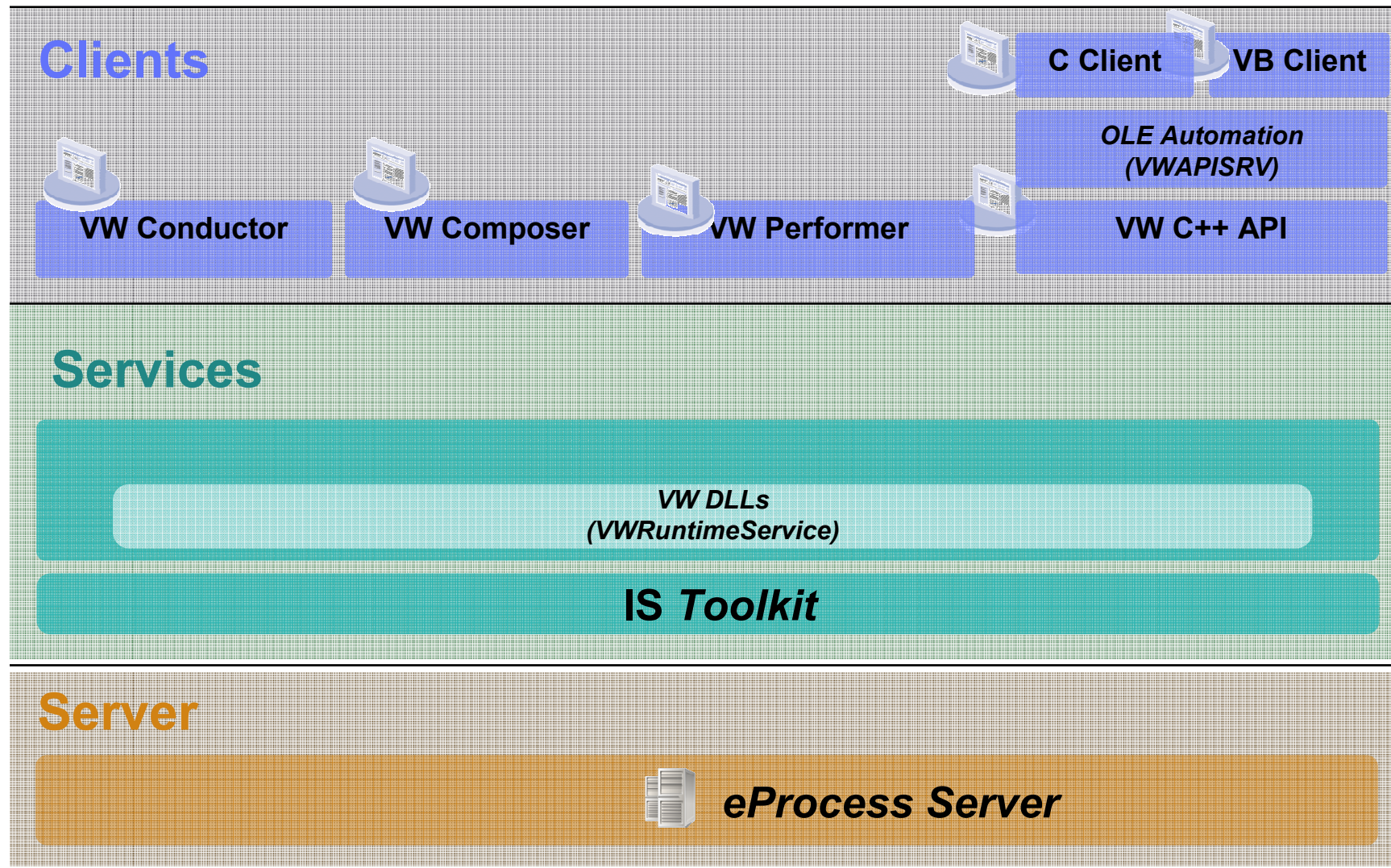
- P8 PJAC
- Tools and Documentation for
 - Moving users and groups to LDAP
 - Transform eProcess Server into a P8 Process Engine
 - Validate eProcess Workflow Definitions in P8 Process Designer
- Enable eProcess & P8 applications running concurrently
 - Work Items accessible via
 - Workplace Tasks
 - Open Client Tasks
 - Personal Work Manager (PWM)

Use Scenario I: How?

Dual Access – Hybrid P8 BPM with PJAC

- An eProcess customer installs a CEMP server and converts their eProcess Process Engine to a P8 Process Engine, patch their Image Manager Suite web servers, and then install AE servers. The users can then access work items from any of the FileNet-supplied inboxes.

eProcess Server with Visual WorkFlo

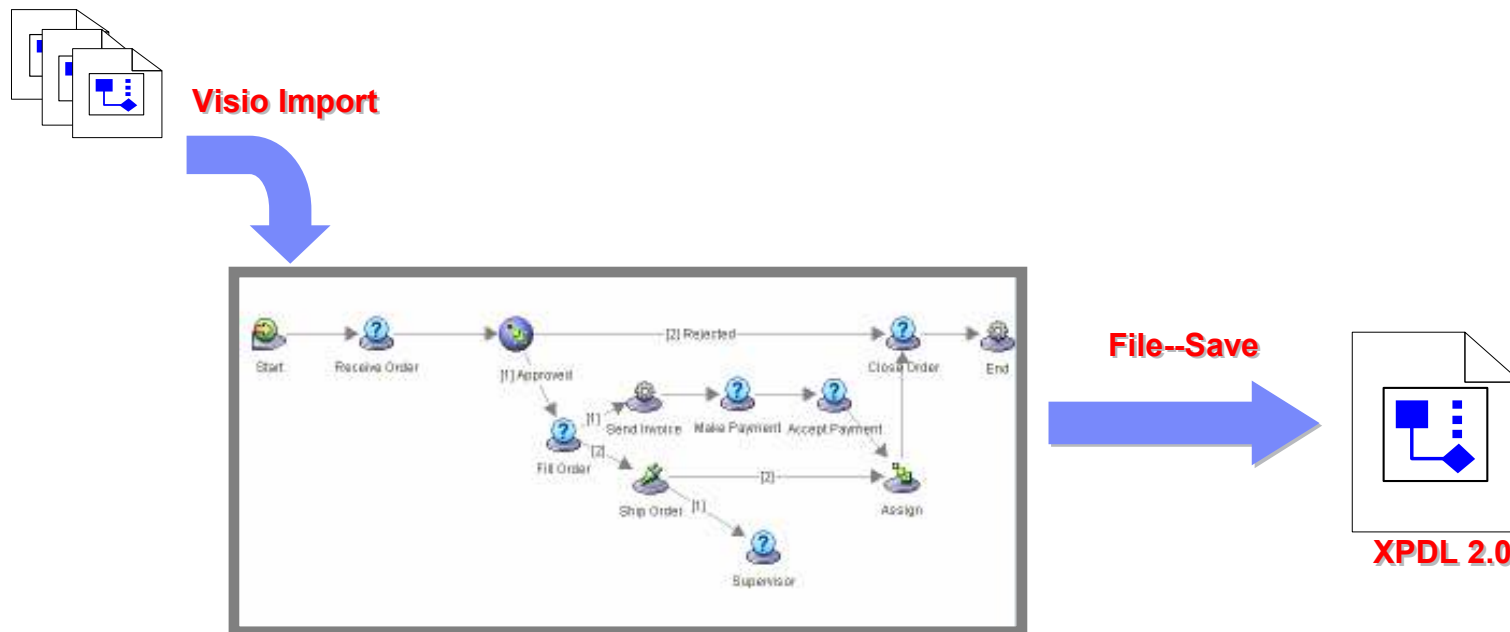


Use Scenario II: Visual WorkFlo Apps Migration to P8 BPM

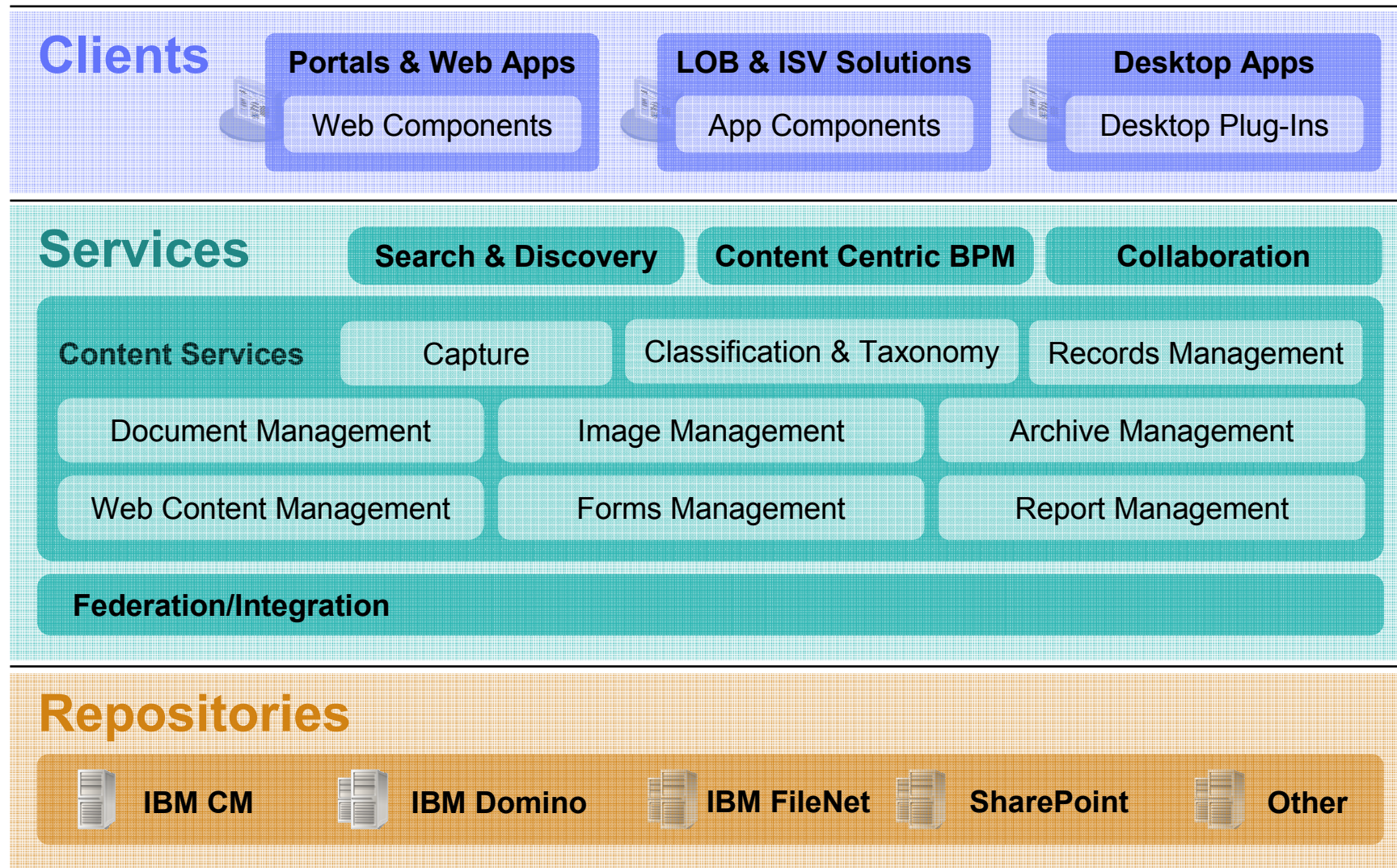
- The XYZ company has an eProcess server with VW client applications and is planning on moving all existing custom applications from VW to P8. New applications will be written using P8 BPM. The XYZ company currently uses VW Composer for authoring their processes and have several workflow definitions in CDL files. Their environment is mission critical at 99.96% uptime SLA required.

Benefits to Visual WorkFlo Migration

- Process Integration with Content
- Process Simulation Integration with Analytics
- Business Activity Monitoring
- Business Process Framework
- Integration and Support of BPM Standards
- Leverage and Interoperate with WebSphere



Use Scenario II: After Picture



Visual WorkFlo Migration - Capabilities and Support

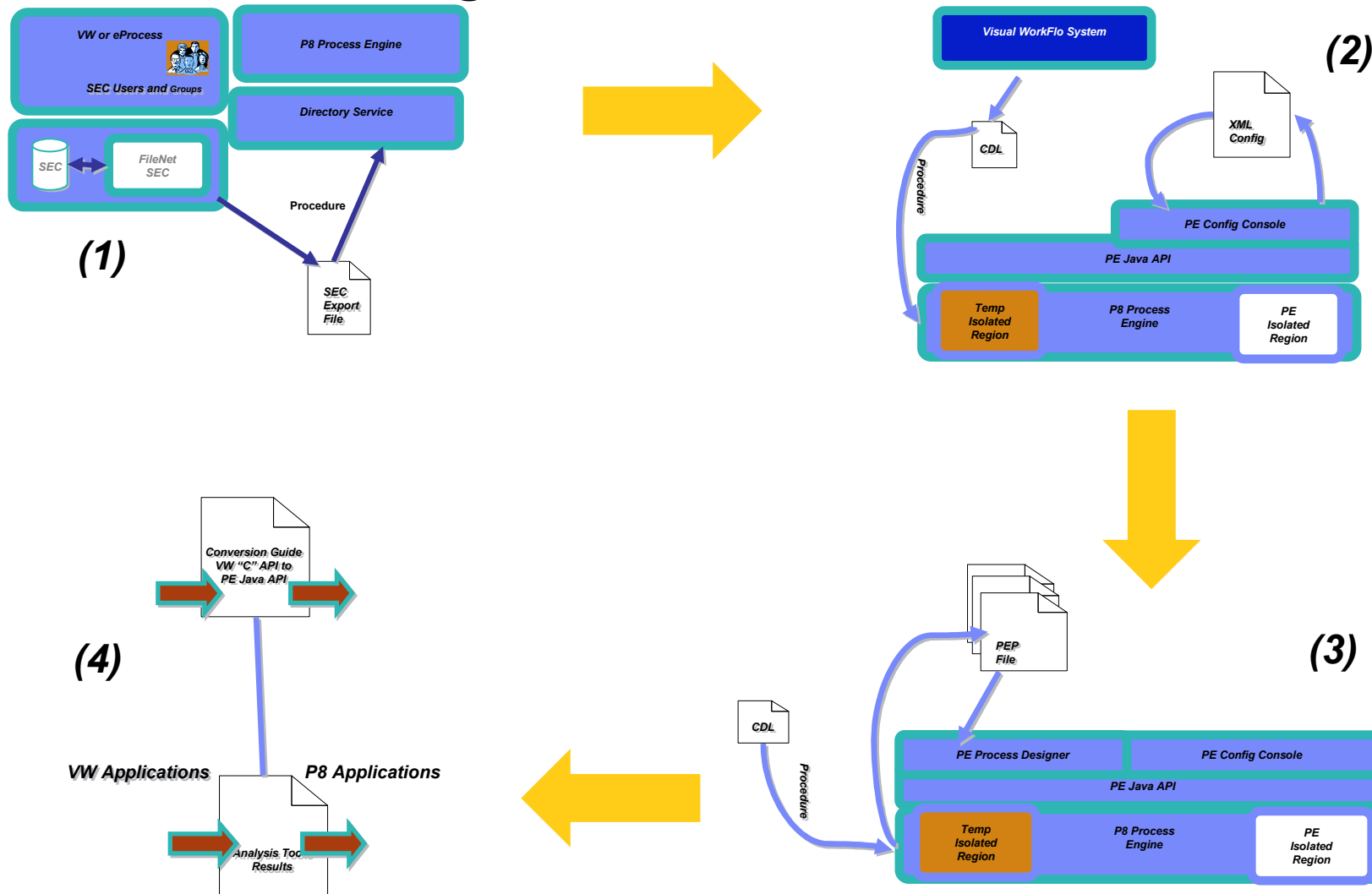
- Enhancements

- Tools to generate Configuration and PEP file
- VW API Mapping Document

- New facilities

- Tools to determine VW API usage
- Documentation for
 - Moving Work Performers
 - Moving users from SEC to LDAP

Visual WorkFlo Migration Procedure



Visual WorkFlo Migration - Use Scenario II: How?

- Visual WorkFlo Migration to P8 BPM
 - Convert SEC users and groups to LDAP users and groups
 - Convert VW configuration to PE configuration
 - Queues
 - Rosters
 - EventLogs
 - Convert VW workflows to PE processes (CDL file to PEP file conversion)
 - Migrate VW applications to FileNet P8 PE applications

Transition Resources and Scope

- Tools to enable move to BPM by Practitioners
 - Lab Services engagements
 - Partners' engagements
- Capabilities
 - Evolving tools
 - Phased approach
 - Opportunity for tools' Improvements
 - Visual WorkFlo Server
 - Tools are not available for this environment

Thank you!!

| | | | |
|---------------------|---|-------------------------|-----------|
| Introduction | <p>ECM as part of Information On Demand</p> <p>ECM Maturity and Adoption</p> <p>Current Portfolio position</p> <p>Roadmap</p> <p>Vision for ECM</p> | Doug Coombs | 30 |
| Content | <p>The Changing Market for Content Management</p> <p>The Role of ECM in Collaboration</p> <p>ECM user interface for the desktop and the web</p> <p>Advanced Search and Analytics</p> | Thorsten Zoerner | 60 |
| Process | <p>Activating Content and Business Process Management</p> <p>The Roadmap for Content Centric Process Tools including product demonstrations</p> <p>IBM Business Process Management Strategy</p> <p>What's next for Process?</p> | Daniel Crow | 60 |
| Compliance | <p>Control and Enforcement</p> <p>Product positioning, roadmap and demonstrations for records and email</p> <p>Classification for ECM</p> <p>What are eDiscovery and the ECM framework for compliance?</p> | Graham Hadingham | 60 |
| Platform | <p>The Repository Roadmap and Federation</p> <p>Next Steps for Infrastructure</p> <p>Software as a Service</p> <p>Portfolio and Vision Re-Visited</p> | Doug Coombs | 30 |