IBM

Provide quick, efficient access to critical business documents with a robust enterprise report management solution.

It's about optimizing business efficiency

Transaction-related content is at the heart of your organization's operations. It might directly touch almost every aspect of your business, including back-office analytics and reporting, e-commerce and customer service. Yet most companies still distribute this content through print documents—even though this is an expensive and inefficient option for business users and customers alike.

In addition, most companies lack reliable management, integration, transformation and delivery tools for critical business content, which can result in siloed content across organizations and cause several problems:

- Lower user productivity because of complex search requirements and inaccessible or unindexed data
- Reduced customer satisfaction due to a lack of self-service capabilities and slow customer service response times
- Higher content management, printing and storage costs

To address these challenges effectively, you need to make your business processes as efficient as possible, while at the same time minimizing your risk and ensuring that your company meets regulatory compliance mandates. You also need the capability to access transactional content in easily digested and shared forms that match user needs and skill sets, without requiring desktop installation or training for each user.

The right enterprise report management (ERM) solution can help you provide access to critical back-office applications—including the reports and information you need to manage your business on a daily basis. It combines strategic hardware and software offerings to give you a highly reliable, flexible system to address your data archiving and retrieval requirements. With a powerful technology foundation, you can automate information-gathering processes and effectively capture, preserve, manage, hold, protect and properly dispose of information assets across your organization.

What is ERM?

Traditional ERM solutions were designed to capture spool files, scanned images and PC files. Sometimes referred to as computer output to laser disc (COLD) systems, the more traditional ERM solutions have usually been implemented to replace paper and microfiche document-storage solutions. They typically provide automated data indexing, archiving and migration capabilities to manage traditional content types (images, office documents, graphics, drawings and print streams) as well as electronic objects (Web pages and content, e-mail, video and rich-media assets) throughout the life cycle of the content. And they do this without sacrificing the integrity and security of the data.

How effective an ERM solution is has a lot to do with how a company uses it. High-volume storage and retrieval capabilities are meaningless if they aren't used to full advantage to streamline operations and help an organization to realize a return on investment (ROI) in months rather than years. Benefits can include:

- Increased customer satisfaction and retention levels.
- Enhanced employee productivity.
- Reduced cost and space for storing paper or microfiche documents.
- Improved data sharing across departments.

Move beyond traditional ERM

Going beyond the traditional ERM solution, IBM Content Manager OnDemand software provides high-volume capture of computer output and flexible search and retrieval options with multiple client solutions for both desktop and standard Web browsers. It also provides automated and optimized storage management, so you can automatically index and store any printed output such as reports, checks, statements or invoices, as well as e-mails and image documents.

Content Manager OnDemand can serve as a platform for implementing electronic bill presentment and payment solutions. In addition to its excellent scalability and performance, Content Manager OnDemand provides extensive platform support, including IBM AIX®, IBM i5/OS®, IBM z/OS®, Microsoft Windows, HP-UX, Linux®, Linux for IBM System z™ and Sun Solaris servers. It also integrates with the IBM FileNet® P8 enterprise content management (ECM) platform so that vital documents and reports can be readily accessed and leveraged by your content, process and compliance applications.

Make content available to those who need it, when they need it

This robust solution and its integration to IBM FileNet P8 give you the ability to expose content to more users, through more channels. The IBM Content Manager OnDemand Web enablement toolkit helps users access data through an industry-standard Web browser. Users can search through archived folders and applications and select documents or sections of reports for browser viewing. The toolkit runs on a Web server and uses standard Content Manager OnDemand interfaces to access data stored on a Content Manager OnDemand server.

The IBM Web Interface for Content Manager OnDemand (IBM WEBi) client is designed as an easy-to-use, highly interactive, customizable and rapidly deployable Web client that employs open standards and supports Web 2.0 and asynchronous JavaScript and XML (AJAX) technologies. Users can retrieve reports, statements, e-mails and check images and other computer-generated output with just a few clicks. Well suited for both local and remote users who are familiar with the point-and-click capabilities of a Web interface, IBM WEBi facilitates user navigation and IT administration. This intuitive client includes many Content Manager OnDemand features, such as customizable interfaces (or skins), multisearch predicates, parametric search, the ability to open multiple document windows from a single viewer framework, the ability to view results beyond a single window (in scroll mode) and the ability to print search result lists from the server.

IBM Content Manager OnDemand provides content transformation capabilities that enable you to establish the necessary access for everyone along your value chain. For example, IBM AFP2Web technologies can help you transform the IBM Advanced Function Presentation (AFP) data stream into HTML, Adobe® portable document format (PDF) and XML for Web browser viewing, helping to simplify the move to electronic information delivery with minimal changes to your production environment. As a result, you can preserve original document integrity while quickly and efficiently providing information to the parties who need it.

Content Manager OnDemand quickly transforms and displays images and text on the screen with the same reliability as if they were printed. When users view documents presented on the Web using AFP2Web transforms, they can use search and navigation features to quickly retrieve information and easily maneuver within multipage documents. And printing to any local printer is easy using the print function within the Web browser or Adobe Acrobat Reader software.

This solution also provides support for a broad set of print data streams through tighter integration with IBM Business Partner Xenos transforms, including:

• Metacode to AFP
• Metacode to PDF
• Metacode to metacode (for index and capture processing, while keeping native Metacode format)
• Printer control language (PCL) to PDF
• AFP to PDF

These transforms are tightly integrated so that Content Manager OnDemand can invoke the appropriate, licensed Xenos transform for indexing, segmentation and loading of reports into Content Manager OnDemand as part of the load process. This integration also provides dynamic conversion so data stored in its native format can be converted into electronic-content formats such as PDF, XML and HTML for distribution.

Enable users to locate content quickly and efficiently
Content Manager OnDemand provides tools that allow employees and customers to use content faster and more efficiently. Federated search capabilities enable applications to access and integrate diverse data and content—structured and unstructured, mainframe and distributed, public and private—as if it were a single resource, regardless of where the information resides, while retaining the autonomy and integrity of the data and content sources.

Search is a fundamental information infrastructure capability that provides crucial access to text or other unstructured data, which is often the bulk of enterprise data. Federated search capabilities—provided by IBM WebSphere® Information Integrator Content Edition software—support property-based and full-text queries against multiple repositories, returning an aggregated result set. This allows companies to take full advantage of their combined information assets.

Whether intranets or extranets, corporate or public, Web sites or portals, the high-quality, scalable and security-rich search capabilities—powered by WebSphere Information Integrator Content Edition software—enable users to locate the most relevant corporate information for employees, suppliers, business partners and customers. Relevant results can be delivered with subsecond response times wherever business data resides, including Web sites, relational databases, file systems, newsgroups, portals, collaboration systems, applications and content management systems.

Leverage federated records management
Content Manager OnDemand leverages IBM FileNet Records Manager software to help companies transform volumes of report-oriented data into federated records. You can categorize checks, statements, invoices and reports as records and manage them efficiently from within FileNet Records Manager. This process helps streamline records and compliance man-agement and can offer several potential benefits by helping to:

Reduce risk exposure—By bringing records-enabling reports, checks, bank statements, customer invoices and other sensi-tive records-class content under the control of a single records

management engine, your organization can manage its archival and retention requirements, which can help lower your exposure to risk.

Lower discovery and litigation costs—Records administrators can perform a single search across multiple systems, including Content Manager OnDemand, then identify relevant records and hold or suspend normal disposition schedules until litigation is resolved.

Lower records administration costs—You can streamline the process of managing records stored in Content Manager OnDemand and other systems from a single records administrator console with a centralized file plan, along with reporting, hold, suspension, audit and disposition capabilities.

Lower total cost of ownership (TCO)—By subjecting Content Manager OnDemand assets to consistent records management policies, the value of your records-management solution can be enhanced. Federated records management can also help lower the cost and complexity of maintaining custom integrations across multiple repository release cycles.

Enhance retention management
With the enhanced retention management capabilities of Content Manager OnDemand, you can lock down individual documents within a report to prevent expiration at the document level. Authorized users can do this from the Content Manager OnDemand Microsoft® Windows® client, WEBi or via an administrator batch script. This is not records management.

Improve productivity and reduce costs
Consider, for example, an organization that mails hard copies of bills to its customers and then has its staff file copies in traditional filing cabinets. As the business grows, it might need several rooms to house these paper-based records. And what happens when a question or problem arises? Someone must

search for a hard copy of the bill or letter of complaint through hundreds, possibly even thousands, of client billing records—a process that could take days, depending on the size of the customer base.

However, if this company had Content Manager OnDemand as its ERM solution, it could have fast, indexed access to transactions and reports. Distributing data electronically can drastically reduce the time it takes to locate the pertinent information, possibly from days to minutes. Also, the company could integrate its Content Manager OnDemand solution with analytics and report-mining tools to learn more about its business, thereby increasing the value of the archived content over time.

Companies that already have an ERM system in place might not be taking full advantage of it, preferring to rely on paper-based records while using the ERM system as a sort of backup solution. By implementing Content Manager OnDemand, these companies can ramp up the capabilities of their traditional ERM systems, eliminating the need to manually distribute paper documents within and between departments. This can enable them to control the costs associated with printing documents and maintaining a staff to manage the paper load and also minimize office and storage space for archiving the documents.

Improve customer service
Consider again the company that relies solely on paper-based processes to manage its relationships with customers. Without a reliable Web presence, this company must process a higher volume in its call center, often because its customers cannot find what they are looking for—even if it is available on the company's Web site. When a customer calls to ask

Product evaluation checklist

Features	IBM	Other vendors
Delivers superior scalability with the capability to manage billions of objects	X	
Offers a modular architecture	X	
Is platform independent	X	
Provides a range of data-type choices (native and transform)	X	
Includes a graphical indexing wizard (line and PDF)	X	
Offers worldwide support and enablement (national language support [NLS])	X	
Includes open, published application programming interfaces (APIs) for integration with line-of-business (LOB) and other applications — including SAP, PeopleSoft, customer relationship management (CRM) and homegrown applications	X	
Provides industry-standard relational databases (nonproprietary), including IBM DB2®, Oracle and Microsoft SQL Server software	X	
Uses an open and documented (nonproprietary) storage management solution for device support and a hierarchical storage management (HSM) solution	X	
Provides the ability to suspend/lock down individual documents within a report to prevent expiration at the document level	X	
Provides Web enablement with a variety of choices — including Common Gateway Interface (CGI), servlet and Java™ technology — for integrating with a Web server and viewing choices from native AFP plug-in and Microsoft ActiveX software to applets and IBM WEBi	X	
Integrates with the IBM FileNet ECM platform	X	
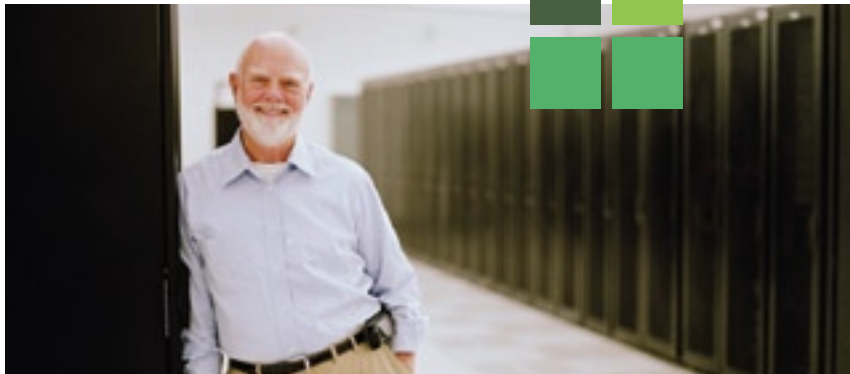
questions or report problems, customer service representatives (CSRs) are unable to handle them in realtime because they are unable to immediately access the paper bill to which the customer is referring. This greatly diminishes the company's ability to serve its customers, which can significantly affect its bottom line.

This company can use Content Manager OnDemand to develop an ERM system that delivers self-service access to computer-generated bills, statements, invoices and other documents—enabling it to compete in a global, Internet-driven world. This can enable CSRs to resolve customer billing inquiries about invoices and statements during the initial call—helping to reduce the number of callbacks for further assistance. In addition, customers can access their own statements, account information and payment options online, which can help them find answers to their own questions and help reduce call center volume and customer service costs. The company can also integrate its Content Manager OnDemand solution with analytics and personalization systems to better understand the needs of its customers and deliver content that is relevant to each user.

Get the right ERM solution for your business
There is a new standard for operating competitively in today's business climate: ERM systems equipped with electronic bill presentment and payment capabilities that retrieve, display, e-mail and reprint invoices, credit memos, bills and statements, in addition to providing Internet self-service. A key element of any CRM strategy, Content Manager OnDemand

has the industrial strength and capabilities to manage your documents—placing important business information directly at the fingertips of employees and customers. With its versatility, scalability and security features, Content Manager OnDemand can become the data and document infrastructure of choice for ERM initiatives.

Why IBM?
Built on a robust, scalable and security-rich platform, IBM Content Manager OnDemand software can bring new levels of connectivity and information access to the organization. It can help organizations leverage business knowledge and information more effectively and respond more quickly to customer and marketplace needs—without putting new strains on the IT organization and infrastructure.

Enterprise content management solutions from IBM help the world's top companies make better decisions, faster. As a marketplace leader in content, process and compliance software, IBM delivers a broad set of mission-critical enterprise content management solutions that help solve today's most difficult business challenges: managing unstructured content, optimizing business processes and helping satisfy complex compliance requirements through an integrated information infrastructure. More than 13,000 global companies, organizations and governments rely on enterprise content management solutions from IBM to improve performance and remain competitive through innovation.

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For more information

To learn more about IBM Content Manager OnDemand software, contact your IBM representative or IBM Business Partner, or visit:

ibm.com/software/data/ondemand/mp