

Choosing the right enterprise report-management system for your company  
Buyer's guide: purchasing criteria

IBM® Information Management software



**Provide quick and efficient access to critical business-data documents with a robust enterprise report-management solution.**

### **It's about maximizing business efficiency**

Transaction-related content and documents are at the heart of your organization's operations. They might directly touch almost every aspect of the business, including back-office analytics and reporting, e-commerce and customer service. In many cases, content distribution through print documents remains the most common—albeit expensive and inefficient—option for business users and customers.

In addition, the lack of reliable management, transformation and delivery tools for critical business content has left it siloed across your organization, causing several problems:

- *Reduced user productivity related to complex search requirements, and inaccessible or unindexed data*
- *Reduced customer satisfaction because of a lack of self-service capabilities and slower 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—and maximize user productivity—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 installations or training for each user.

In today's business landscape, a major aspect of business efficiency means making content readily available across and beyond your organization. The right enterprise report-management (ERM) solution can help you provide access to critical back-office applications—the reports and

information that you need to manage your business on a daily basis. It combines strategic hardware and software offerings to give you a highly reliable, yet flexible, system to address your data archive and retrieval requirements. With this 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, more-traditional ERM solutions have usually been implemented to replace paper and microfiche document-storage solutions.<sup>1</sup> They typically provide automated data-indexing, archiving and data-migration capabilities. Regardless of the precise terminology, ERM capabilities 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 that content.<sup>2</sup> All without sacrificing the integrity and security of the data it manages.

The effectiveness of an ERM solution 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 their full advantage. An effective ERM system can streamline operations and enable an organization to realize its return on investment (ROI) in months rather than years. Benefits can include:

- *Increase in customer-satisfaction and retention levels*
- *Improvements in employee productivity*
- *Reductions or even elimination of cost and space for storing paper or microfiche documents*
- *Improved data sharing across departments<sup>3</sup>*



### **More than traditional ERM**

IBM Content Manager OnDemand, ranked at the top in Gartner's 2006 Integrated Document Archival and Retrieval System Magic Quadrant,<sup>4</sup> is an industry-leading ERM solution. It provides high-volume capture of computer output, with multiple client solutions for both desktop and standard Web browsers with flexible search and retrieval options. It also provides automated and optimized storage management. With Content Manager OnDemand, you can automatically index and store any printed output such as reports, checks, statements or invoices, as well as e-mails and image documents. You can also use Content Manager OnDemand as a platform for implementing electronic bill presentment and payment solutions. In addition to its excellent scalability and performance, Content Manager OnDemand also 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.

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

With this robust solution, you have the ability to expose content to more users, through more channels. The IBM Content Manager OnDemand Web Enablement Toolkit enables users to 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 Management (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 Java™ and XML (AJAX) technologies. Users can retrieve reports, statements, e-mails, check images and other computer-generated output with just a few clicks. IBM WEBi is well-suited for both local and remote users who are familiar with the point-and-click capabilities of a Web interface, helping with both 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-results lists from the server.

You also need an efficient, cost-effective solution that goes beyond paper-based communication. Ubiquitous access to the Internet enables your employees and customers to access and view reports, business data, statements and invoices online when and where they want. Electronic presentment capabilities enable you to expand your Web presence—and maximize the productivity of everyone who comes in contact with your business.

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™ (IBM AFP™) data stream into HTML, 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 you quickly and efficiently provide information to the parties who need it.



Images and text can be quickly transformed and displayed 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.

Content Manager OnDemand 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)*
- *Print Control Language (PCL) to PDF*
- *AFP to PDF*

These transforms are tightly integrated to:

- *Allow Content Manager OnDemand, as part of the load process, to invoke the appropriate, licensed Xenos transform for indexing, segmentation and loading of reports into Content Manager OnDemand.*
- *Provide dynamic conversion. Data stored in its native format can be converted into e-content formats such as PDF, XML and HTML for distribution.*

#### *Enable users to locate content quickly and efficiently*

Content Manager OnDemand provides tools that enable 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, enable property-based and full-text queries against multiple repositories, returning an aggregated result set. With federated search capabilities, companies can take full advantage of their combined information assets.

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

As a complement to search capabilities, federated records management enables you to manage and control all records-class content through one centralized records-management application—even when your records are distributed across multiple, disparate content-management systems. You can use your existing content-management systems and business applications, make the process of records-enabling documents “touchless” to users and achieve more-consistent implementation of your recordkeeping policies. Federated records management also enables you to accelerate time to market for enterprise-wide records-management solutions.

IBM Federated Records Management for Content Manager OnDemand is designed to help companies transform volumes of report-oriented data stored in Content Manager OnDemand into records. Checks, statements, invoices and reports can be declared as records and efficiently managed from within IBM records-management capabilities. This process helps streamline records and compliance management and can offer several potential benefits by helping to:

- **Reduce risk exposure.** *Records-enabling reports, checks, bank statements, customer invoices and other sensitive records-class content, and bringing it under the control of a single records-management engine, enables your organization to manage its archival and retention requirements, which can in turn 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, identify relevant records and hold or suspend normal disposition schedules until litigation is resolved.*
- **Lower records administration costs.** *A single records administrator console and centralized file plan and reporting, along with hold or suspension, audit and disposition capabilities, can help streamline the process of managing records stored in Content Manager OnDemand and other systems.*
- **Lower total cost of ownership.** *You can maximize the value of the investment in a records-management solution by subjecting Content Manager OnDemand assets to consistent records-management policies. Federated records management also can help lower the cost and complexity of maintaining custom integrations across multiple repository-release cycles.*



### **Maximize productivity and reduce costs**

Consider the organization that mails hard copies of bills to its customers and then has staff file copies in traditional filing cabinets. As business grows, several rooms might be required 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, depending on the size of the customer base, could take days.

With Content Manager OnDemand as its ERM solution, this company could have fast, indexed access to transactions and reports. Because the information is distributed electronically, the time it takes to locate the pertinent information can be drastically reduced, possibly from days to moments. Also, the company could integrate its Content Manager OnDemand solution with analytics and report-mining tools to learn more about the business—increasing the value of the archived content over the long term.

Some companies might already have an ERM system in place, but might not be taking full advantage of it, preferring to continue to rely on paper-based records while using the ERM system as a sort of backup solution. Implementing Content Manager OnDemand can ramp up the capabilities of a traditional ERM system, enabling companies to eliminate the need to manually distribute paper documents within and between departments. Doing so can in turn enable them to control the costs associated with printing documents and maintaining staff to manage the paper load, and minimize the office and storage space for archiving the documents.

## Product evaluation checklist

	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]), including an administrator client	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	X	
Uses an open and documented (nonproprietary) storage-management solution for device support and a hierarchical storage-management (HSM) solution	X	
Provides Web enablement with a variety of choices, including CGI, servlet and Java, for integrating with a Web server, and viewing choices from native AFP plug-in and ActiveX to applets and IBM WEBi	X	





### **Improve customer service**

Again, consider 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 customer calls come in to ask questions or report problems, customer service representatives (CSRs) are unable to handle them in real time, because they are unable to immediately access the paper bill the customer might be referring to. The company's ability to efficiently serve its customers is greatly diminished, which ultimately can significantly affect its bottom line.

Customer-centric, Web-enabled data documents are a key element of CRM strategy. 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. With Content Manager OnDemand, this company can enable CSRs to resolve customer billing inquiries about invoices and statements during the initial call—helping to reduce the number call-backs for further assistance. In addition, customers can access their own statements, account information and payment options online. Providing this capability can help them easily find the answers to their questions on their own, helping to reduce call-center volume and reduce 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 customer and deliver content that is relevant to each user.

### **The right ERM solution for your business**

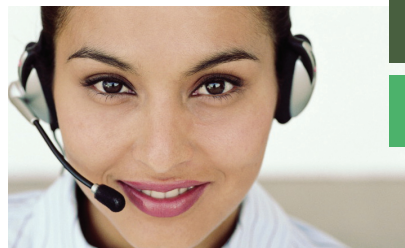
Today's call centers and back-office systems often operate with incomplete information—'islands of technology' exist that do not communicate with each other. Information is not electronically available, either offline in paper or microfilm, or is unavailable in another digital repository. These situations translate to poor customer service and business inefficiency, with increases in operating costs due to customer call-backs, and the time and effort to manage document archiving and storage.

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 or statements, as well as providing Internet self-service. Content Manager OnDemand is the technology solution with proven industrial strength and the ability to manage documents—placing important business information at the fingertips of employees and customers. The versatility, scalability and security of Content Manager OnDemand empowers it to become the data-document infrastructure of choice for ERM initiatives.

### **For more information**

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

[ibm.com/software/data/ondemand/mp/](http://ibm.com/software/data/ondemand/mp/)





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<sup>1</sup> "Computer Output to Laser Disc." Wikipedia, The Free Encyclopedia. April 17, 2007, 14:45 UTC. Wikimedia Foundation, Inc. June, 12 2007.

<sup>2</sup> "Enterprise Content Management (ECM) definitions." ECM Solutions Seminars. 2006.

<sup>3</sup> Porter-Roth, Bud. "Achieving ROI on Enterprise Report Management (ERM) Systems." AIIM.org. August 24, 2005.

<sup>4</sup> Chin, Kenneth and Toby Bell. "Magic Quadrant for Integrated Document Archive and Retrieval Systems, 2006" Gartner Research. June 27, 2006.