

# IBM ECM 2015 Strategy and Roadmap

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# Business Content is essential for Business Outcomes

**Stay competitive through productivity and cost savings**



**Increase growth through customer centricity**

**Protect organization against risk through security and compliance**

# ECM solutions need to support all critical capabilities



## Capture

Reduce paper handling and shipping

Extract valuable business data from content

Push capture to the edge of the enterprise



## Protect

Reduce risk by eliminating what you don't need

Guard against fraud, comply with regulations

Govern content throughout its lifecycle



## Activate

Use content across business systems

Eliminate silos between departments

Increased productivity of teams



## Analyze

Reveal insight hidden in content

Improve business decisions

Improve performance of people and systems



## Engage

Connect people, content, analytics and process

Streamline collaboration with hybrid cloud

Mobile access to business content

# What is IBM Enterprise Content Management ?

## Content Navigator

An engaging experience across web, mobile and desktop

### CONTENT



Improving knowledge worker productivity through collaborative content management

### CASE



Better outcomes through content-centric solutions

### GOVERNANCE



Improving information economics by aligning costs and risks with value

**FileNet CM**

**CM OnDemand**

**IBM CM8**

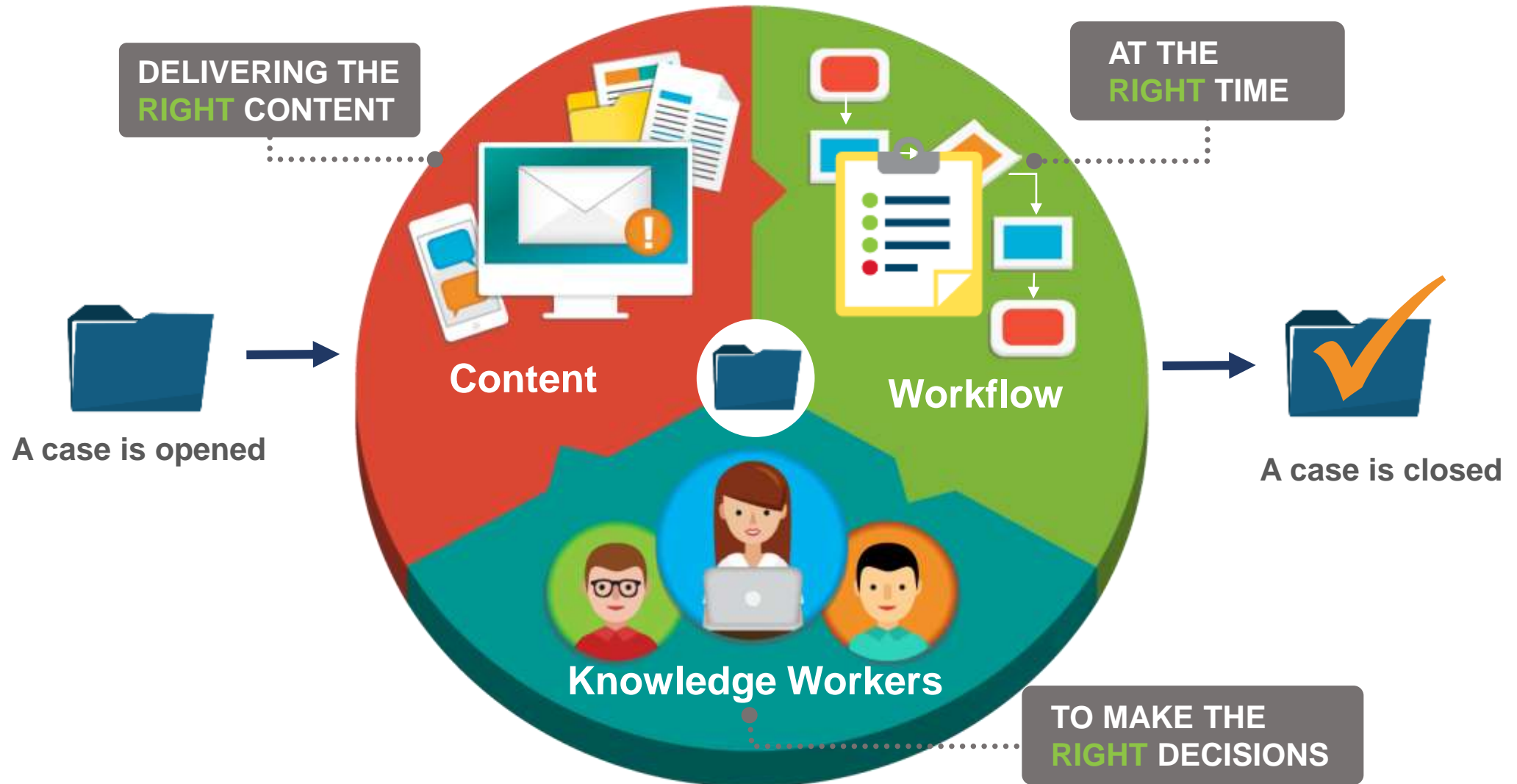
**CMIS**

**BOX**

# Completing the Content Navigator Vision



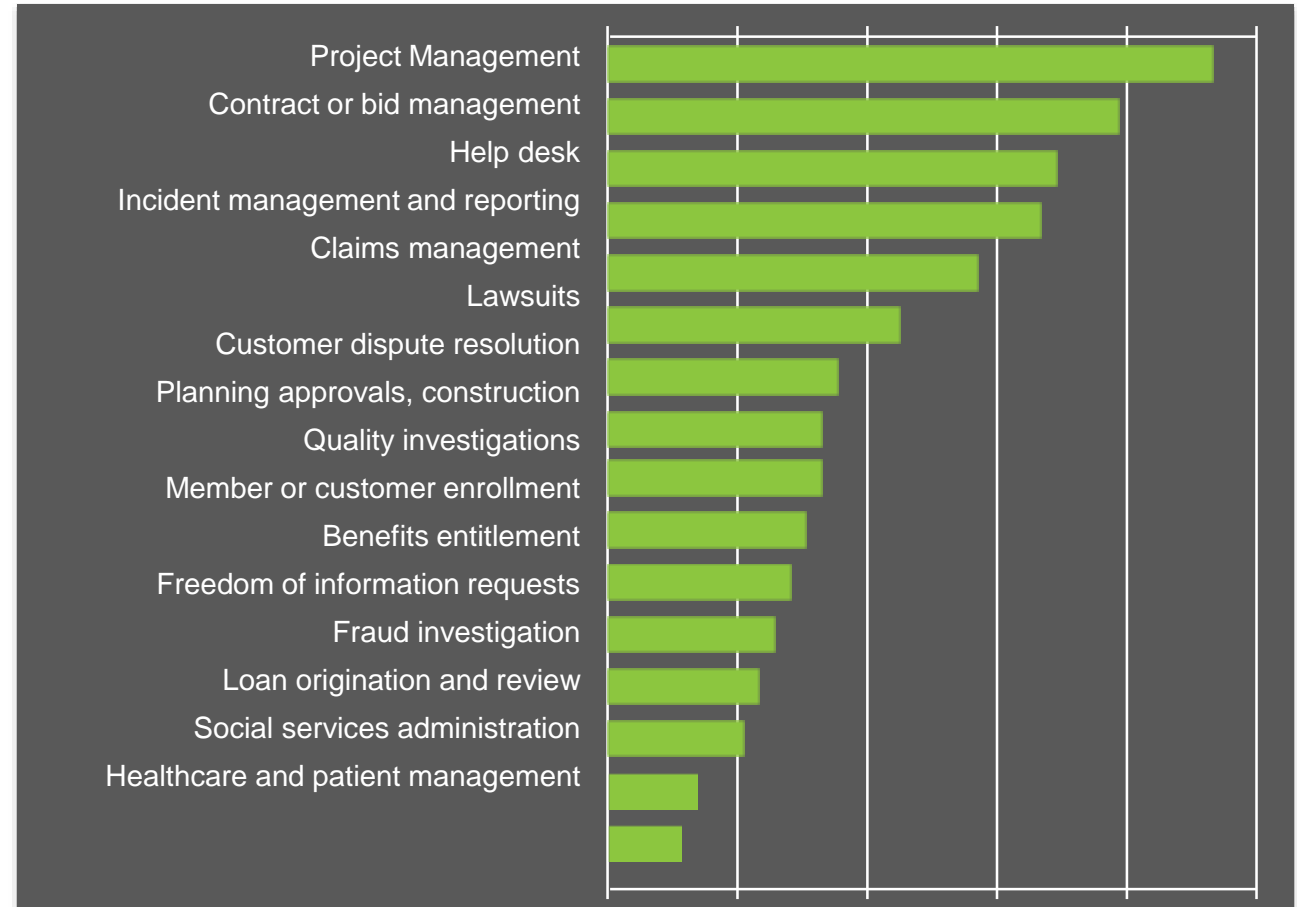
# Giving knowledge workers the flexibility they need to make expert decisions to help driving better business outcomes





# Every business has many potential uses for Case Management

- ▶ Many business applications follow a case pattern and are built around content
- ▶ Case as a shared service platform enables these applications to be built at lower cost, with more consistency
- ▶ Once the first couple of applications are deployed, significant reuse is possible

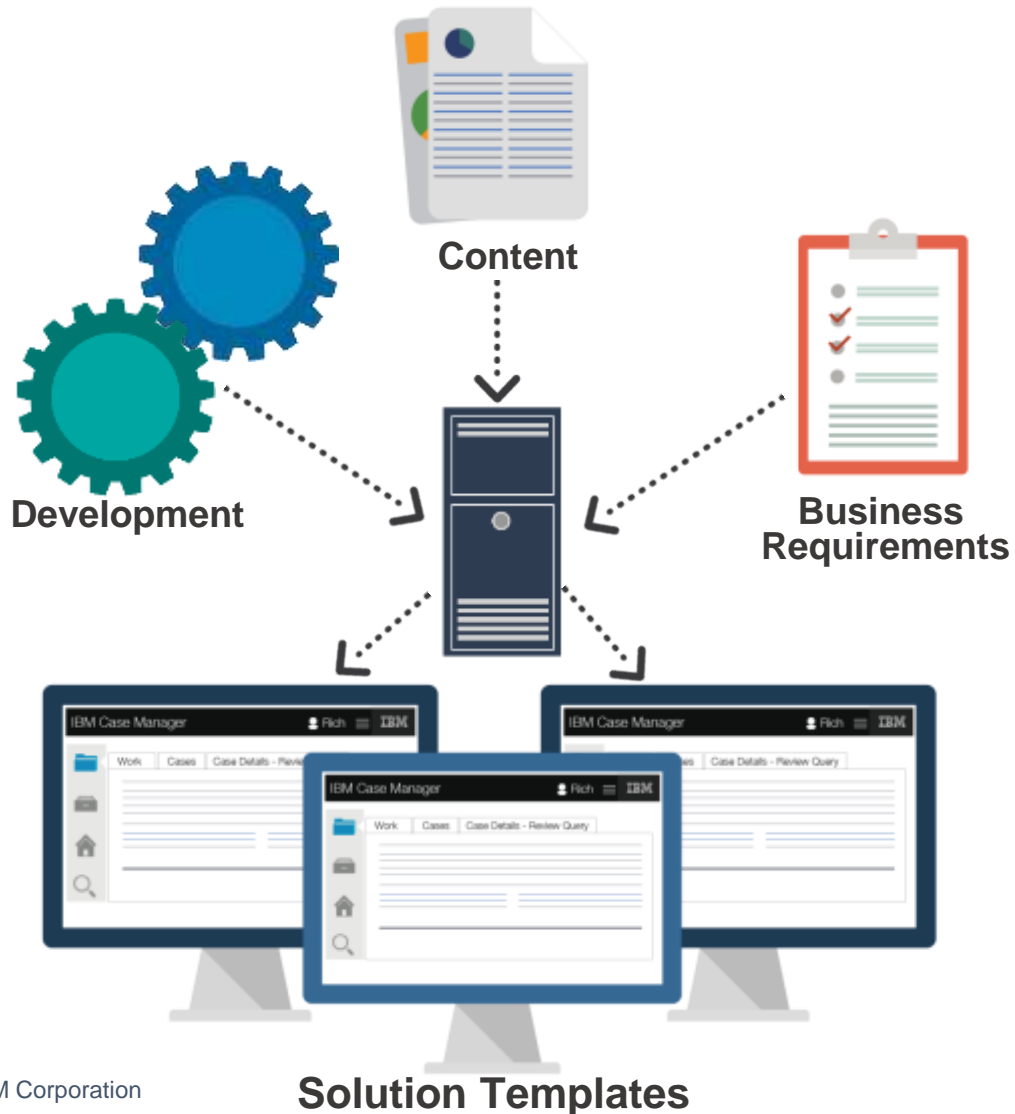




# Case Manager as a Shared Services Platform



*A cost effective and scalable model for development and deployment of solutions based on common patterns*



## A shared service provider

- ▶ Reuse the same tools, technologies, and training to deploy new solutions faster
- ▶ Solution Templates allows common solution patterns to accelerate future solution delivery
- ▶ Provides a common infrastructure and a consistent development environment
- ▶ Shares a common end user web based client application, built on the IBM content navigator experience platform
- ▶ Minimizes additional purchasing and licensing efforts for existing customers



# Roadmap Overview

## IBM ECM Priorities – Now and Later

### **IBM Design Thinking**

A framework for delivering great user experiences to our clients

Experiences that work together, work the same, and work for our users

### **Continuous Product Delivery**

Focus on delivering new capabilities to the market, as needed, in smaller, more easily consumable deliverables



# Roadmap Overview

## IBM ECM Priorities – Now and Later

### **Cloud and Mobile**

Cloud and mobile are driving innovation and shifting our mindsets to focus on agility, speed and engagement

### **Shared Services (and Practices)**

A cost effective and scalable case platform that makes the right content accessible for analytics, discovery and reuse

Configure process solutions quickly by re-using common elements and change them as the business changes





# Roadmap Overview

## IBM ECM Priorities – Now and Later

### **Analytics and Watson**

Support people with a knowledgeable advisor that captures the expertise of SMEs

Provides contextual and relevant answers to business questions, along with alternative options



# What to Expect in 2015-2016



Highly consumable solution platform in the cloud - “Galaxy”



Cognitive document capture



Exploitation of Hadoop and Analytics Platform capabilities



Unification of lifecycle governance capabilities – “Newcastle”



Significant integrations with Box



High value cloud solutions that add value to on-premise systems



# 2015 IBM Content Platform Roadmap Overview

## NOW

- ▶ File and folder sync enables offline use and update of content across devices
- ▶ Entry templates to streamline document adds, properties, etc.
- ▶ Reusable components, including SharePoint Web Parts
- ▶ HTML5 Daeja Virtual Viewer

## SOON

- ▶ Support for full access to Box content, federated search between IBM ECM and Box, and hybrid use cases such as the ability to share on-prem content using Box sync & share
- ▶ New, streamlined mobile experience

## LATER

- ▶ CMIS 1.1 support
- ▶ Integration with Aspera for high speed file transfer
- ▶ Enhanced Virtual Viewer experience
- ▶ End to end redaction
- ▶ Hadoop support

# 2015 Content Manager OnDemand Roadmap



## NOW

- ▶ High-performance statement presentment and enterprise report management
- ▶ Unmatched compression & storage optimization
- ▶ Fast deployment and ROI
- ▶ Archiving of XML transactions (e.g. financial payments)
- ▶ Cloud and On-Premise

## SOON

- ▶ Customer-driven enhancements for on-premise and cloud deployments
- ▶ SoftLayer Object storage
- ▶ Annotation of PDF documents
- ▶ Support for zOS Enterprise Data Compression to reduce ZOS MIPS requirements

## LATER

- ▶ Support for HDFS to store CMOD content in Hadoop ecosystem for analytics
- ▶ Spark connector enabling powerful big data analytics on CMOD content
- ▶ Drag and Drop of documents into CMOD from IBM Content Navigator
- ▶ CMIS interface with support for adding content to CMOD



# 2015 Datacap Roadmap Overview

## NOW

- ▶ Distributed document capture
- ▶ Mobile capture apps and SDK for iOS and Android
- ▶ Navigator based UI including Accounts Payable
- ▶ Full set of web services

## SOON

- ▶ Capture as-a-service and Transactional capture
- ▶ Enhanced imaging, recognition, and classification
- ▶ Enhanced Datacap and Case Manager integration
- ▶ Support for Box

## LATER

- ▶ Mobile capture updates
- ▶ Cognitive Capture
- ▶ Bluemix capture services
- ▶ Capture application definition in Galaxy

# 2015 Case Manager Roadmap Overview



## NOW

- ▶ Reduce Complexity and Custom Coding
- ▶ Next Gen Case Manager Mobile for iOS and Android with MDM Support: dashboard, case summary, history, tasks, documents, role based queues, case properties

## SOON

- ▶ Integration with Box
- ▶ Additional Property Layout Editor capabilities
- ▶ Case Manager Mobile SDK, and additional features such as role based solution screen, comments & map tasks

## LATER

- ▶ Support for Hybrid use cases with Cloud Offerings
- ▶ ECM solution platform on the cloud
- ▶ Additional Industry and Vertical solutions
- ▶ Case Manager Mobile enhancements including cloud push notifications, offline cases, task level properties, & Apple Watch support
- ▶ Project Galaxy

# 2015 ILG Roadmap Overview



## NOW

- ▶ New Interactive Analytics for Refining Data Visually
- ▶ 100's of connectors to access data from most vendors through native connectors and full CMIS capability
- ▶ StoredIQ for Legal – new legal data management product with UI from IBM Design Studio

## SOON

- ▶ Expanding legal platform to integrate all legal function from data identification through production
- ▶ New data source connectors including OpenText, CM8 and CMOD
- ▶ StoredIQ support for Box

## LATER

- ▶ Unification of ILG Platform based on StoredIQ
- ▶ High-performance search across large datasets
- ▶ Increased fidelity of data identification through iterative refinement workflows
- ▶ Integration of records capabilities into the platform
- ▶ eDiscovery on Box



# 2015 ECM Managed Service Offerings



## Case Manager On Cloud

Advanced Case Management

Design, develop, and support Case solutions faster

Scales up or down quickly and easily to meet demand

All in one package – no software licenses or hardware to purchase



## CMOD on cloud

Content Archival and Report Management

Archive & manage reports, customer correspondence such as billing, policies, and payment transactions

Includes pre-defined & pre-priced services for customer use cases

Add-on services for integration of customer's systems (e.g. web portals)



## Content Foundation on Cloud

Full content lifecycle and document management

Extensive capabilities for simple or extremely large, complex requirements

Manage content from multiple, disparate repositories.

Customize solutions for specific business needs with APIs and tools



# Content Navigator Mobile

## Extend content access and collaboration to mobile users

- ▶ New, simpler UI
- ▶ Allow users to add, edit, browse, search, and share content from mobile devices leveraging sync and share capabilities
- ▶ Enable bi-directional synchronization of file edits and movement of folders
- ▶ Let users access and create shared searches and save their favorite files, folders and teamspaces



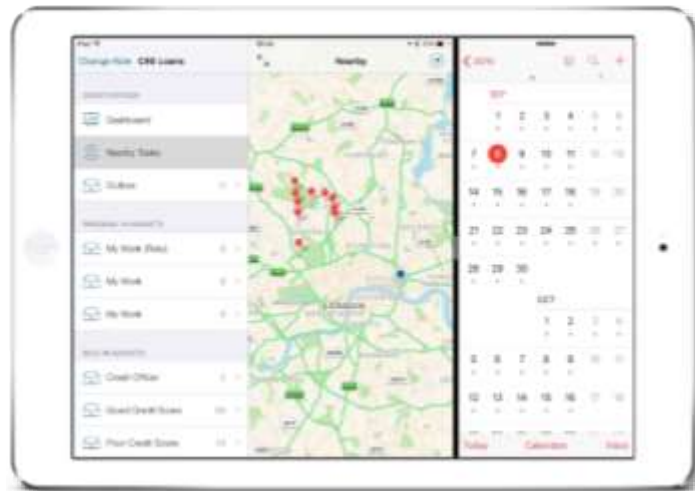
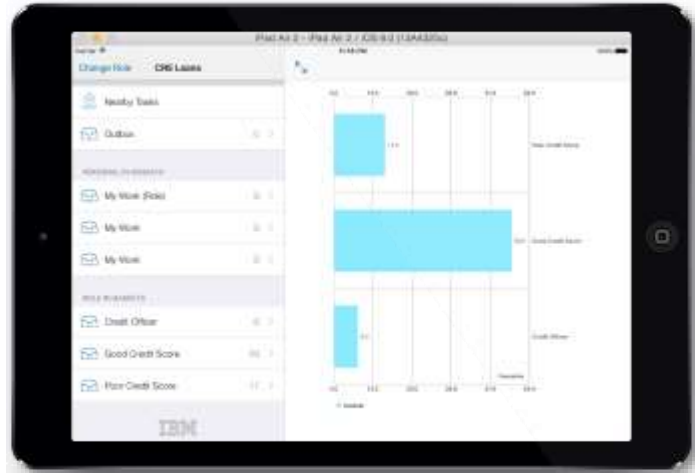
**Runs on iOS and Android mobile devices natively, optimized for both phones and tablets**

# Datacap Mobile

- ▶ iOS and Android apps
- ▶ SDK for customization
- ▶ Auto-capture with video camera
- ▶ Real-time edge detection
- ▶ On-device OCR
- ▶ Offline capture
- ▶ Document separation, assembly, and indexing
- ▶ And more ...



# IBM ECM Case Manager Mobile



- ▶ Act on insights from the palm of your hand
- ▶ Build face-to-face relationships with customers away from the office
- ▶ Turn field-workers into instant experts
- ▶ Check on information when workers need it, trigger tasks, and remotely collaborating with colleagues
- ▶ Zero-code branding, theming, and MaaS360 integration
- ▶ No more “I’ll call you when I’m back at the office”.



# How IBM ECM has evolved

**1980-2010**



Databases & Repositories

**2005-2014**



Case Management

**2015+**



Analytics everywhere



# Identify, Analyze and Act on Unstructured Data

## Secure High Business Value Content

IP, Pricing, Sales, Marketing, Contracts, Patent, Planning

## Remediate Regulated Content

PII, PCI, HIPAA, HR, Financial Records, Customer

## eDiscovery Identification and Collection

Early Data Assessment and Targeted Collection

## Cleanup ROT Content

Redundant, Obsolete and Trivial Content

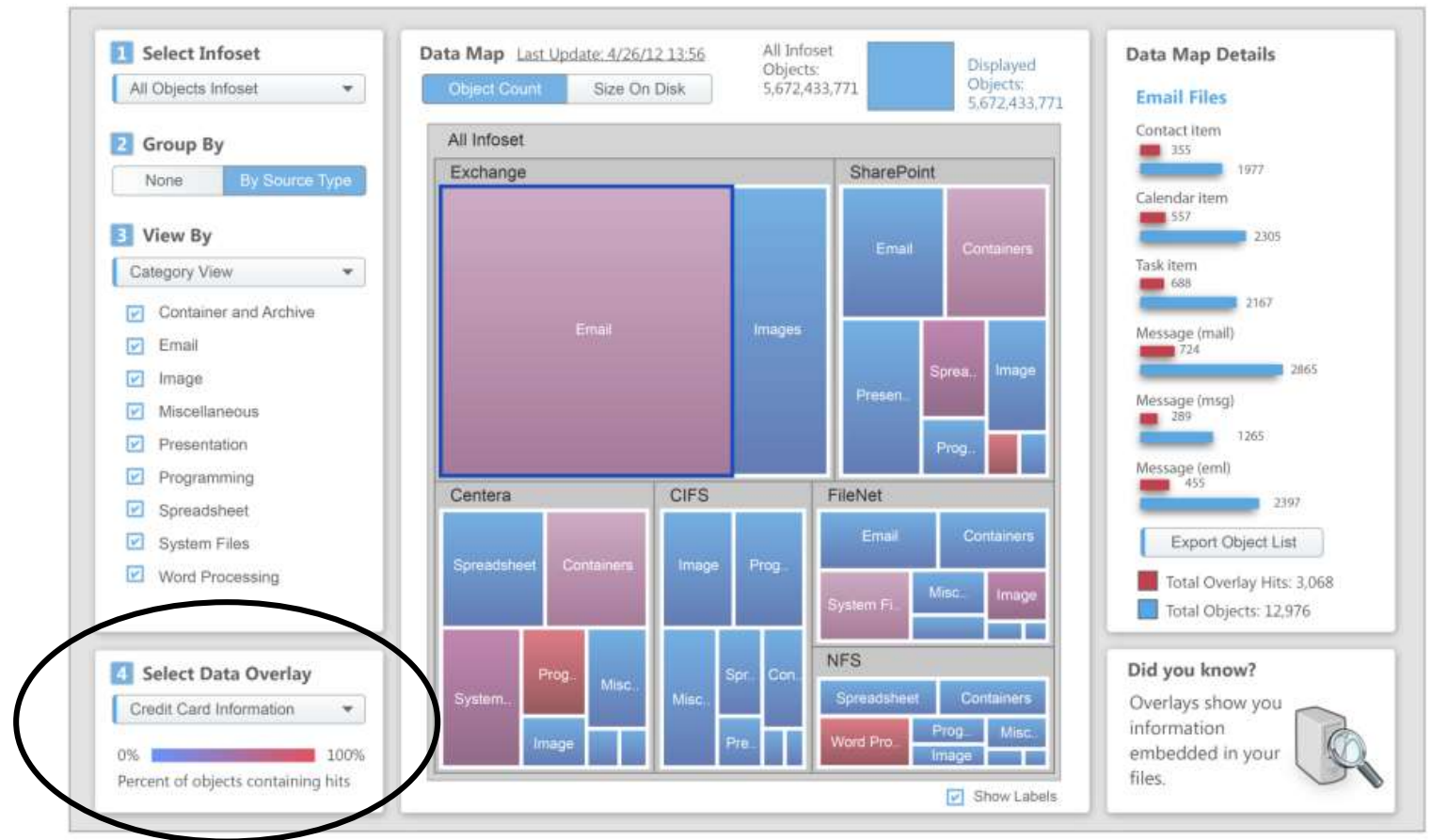
# Reducing Risk: Identify potential compliance issues

## *IN-PLACE Data Analysis*

### Analyze unstructured content across 75+ data sources

- ▶ Lower costs by identifying and disposing of unneeded data from file shares, SharePoint sites and other sources
- ▶ Reduce risk by finding sensitive personal or business data that is not stored securely
- ▶ Perform eDiscovery across a wide range of data sources and collect content needed for litigation

### Collections from 75+ data sources through one interface





# Cognitive Capture ... the next generation of Capture



<b>RE: Change of address</b>	My bank account number is 933485855.
Mr Peter Doe 143 James Street Manchester M31 9EE	Flat 2 – Birchtree Court Birchtree Avenue Cheadle Manchester M29 5ER
	03/03/2013.

My bank account number is 933485855.	03/03/2013.
My bank account number is 933485855.	03/03/2013.
My bank account number is 933485855.	03/03/2013.
My bank account number is 933485855.	03/03/2013.

Mr Peter Doe 143 James Street Manchester M31 9EE	Mr Peter Doe 143 James Street Manchester M31 9EE	Mr Peter Doe 143 James Street Manchester M31 9EE
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	03/03/2013.	
	03/03/2013.	

To recognize, classify, and extract key data from documents we have not seen before ...

# Content Analytics Integrated with Content Navigator



The screenshot displays the IBM Content Navigator interface. On the left is a 'Folder Browser' showing a tree structure of folders like 'es045', 'DOW30', 'ICA', etc. Below it is a 'Facet Navigation' section with categories like 'Part of Speech', 'Phrase Constituent', and 'Sentiment Analysis'. The main area shows search results for the query: "AND (keyword:/'Sentiment Analysis/'Negative/'decline' OR keyword: [unclear])". Two document snippets are visible, both titled 'No Job Name' and dated October 29, 2013. The first snippet discusses Microsoft's performance, mentioning 'disappointing' and 'decline'. The second snippet discusses Exxon Mobil's earnings, mentioning 'disappointing second-quarter' and 'decline'. On the right, a 'Facets' table is displayed, showing sentiment analysis results for various terms.

Check	Values	Frequency	Correlation
<input type="checkbox"/>	decline	9	3.1
<input type="checkbox"/>	disappointing	3	1.3
<input type="checkbox"/>	recessions	9	5.5
<input type="checkbox"/>	weak	4	4.8
<input type="checkbox"/>	weaker	2	2
<input type="checkbox"/>	declined	2	1.5
<input type="checkbox"/>	cautious	2	1.5
<input type="checkbox"/>	difficult	3	1.4
<input type="checkbox"/>	gross	2	0.6
<input type="checkbox"/>	unsustainable	1	0.4
<input type="checkbox"/>	sluggish	1	0.4
<input type="checkbox"/>	exacerbated	1	0.4
<input type="checkbox"/>	NOT exciting	1	0.4



# ECM's Growing Partner Ecosystem

## Enabled by Case Manager and Content Navigator

**Partner solution: Kaltura Video Navigator for ECM**

**Kaltura**  
www.kaltura.com

- Video supported on a tablet device in the IBM Content Manager and Content Navigator
- Search Level 1 - "IBM" found as matches in name
- Searches process responses faster in ECM for any device, any where, any time
- Search Level 2 - "IBM" found in regular file or agents for test structure
- Search Level 3 - "IBM" found in test document on network - IBM Resources Asset

The most powerful combination of ECM and video enriches business workflows. Optimized consistent delivery anywhere for the best user experience. Unified content management reduces complexities and risk.

IBM Smarter Content

**Partner solution: enChoice KwikWork for Content Navigator**

**enChoice**  
www.enchoice.com

- Improves time-to-solution
- Enhances usability and efficiency
- Provides seamless access to documents, cases and tasks
- Enables developers to deliver modern UX design

Provides integration with line of business applications without development

IBM Smarter Content

**Partner solution: Secore FileSecure**

**SECORE**  
www.secure.com

- Leader in next-generation digital rights management
- 4+ million users
- Connector for IBM Content Navigator easily adds persistent usage controls to files

IBM Smarter Content

**Partner solution: Digital asset management for Navigator**

**Stamps Technologies**  
www.stamps.com

- Thumbnail, one-click download, inline streaming
- Additional metadata & renditions of document from Media Upshot

IBM Smarter Content

**Partner solution: CENIT ECLISO**

**cenit**  
www.cenit.com

**Electronic dossier management**

- Management of any kind of dossiers (e.g. project, contract or customer dossiers)
- Dossier feature to handle properties and content
- Definition of templates
- Expandable and configurable
- Optimized views for different user groups
- Working lists for dossiers and documents for simplified access to important content
- Extended search for documents and dossiers
- Structured access to predefined and individual searches

IBM Smarter Content

**Partner solution: Bulk output for Content Navigator**

**Crawford**  
www.crawford.com

- Support multiple IBM ECM repositories with a single output solution (CMOD, PR, CMI)
- Accumulate documents for output using a simple to use "shopping cart" process
- Support multiple content types in a single submission (HTML, MS Office, PDF, JPEG, TIFF, GIF, AFP TXT)

IBM Smarter Content



# 2015 New Partnerships

Details  
coming up at  
1:30 PM



Bringing together IBM's leading enterprise content management capabilities with Box's industry-leading cloud content collaboration platform

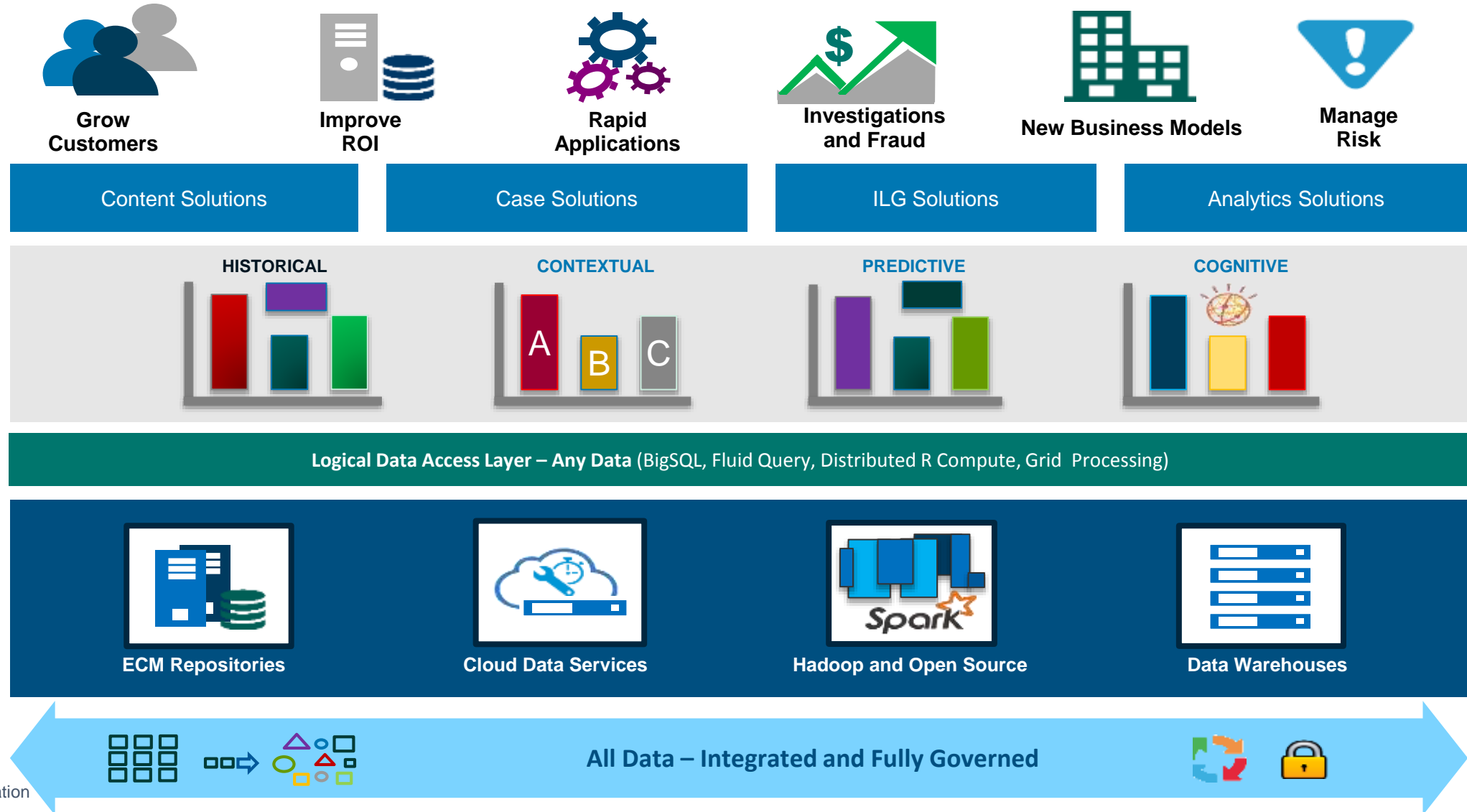


Understand, manage, and optimize data including data generated by the ever-expanding enterprise communication and collaboration platforms



Video platform designed to create value with video. With a wide range of features and powerful tools to quickly expand audiences, generate revenue, and create more effective digital communications.

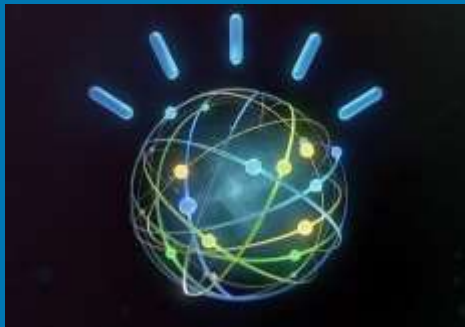
# How ECM will Benefit from the IBM Analytics Platform



# How IBM and Partners will Build Solutions

## Smarter Content Solutions

### Cross-IBM Solutions



**Watson Curator**



**Education \***



**IBM Case Manager for Investigations**



**Counter-fraud Solution**

### Industry Focused Partner Solutions



**HEALTH**



**INSURANCE**



**ENERGY**



**BANKING**



**GOVERNMENT**



**RETAIL**

# Why IBM?

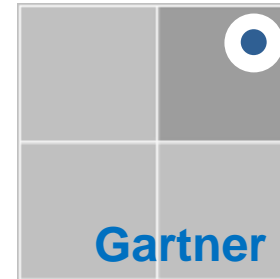
## A recognized industry leader

- Seven of the top eight banks
- 24 of the top 25 insurers
- All 24 top U.S. government agencies
- 15 of the top 16 telcos
- All eight top retailers

## Market Share by Vendor

### 2014:

IBM:	18%
Open Text:	15%
EMC:	8%



## Leader in the Evolution of ECM

- **Enterprise Content Management**  
– Gartner MQ Leader
- **Enterprise Content Management**  
– Forrester Wave Leader
- **Transactional Content Management**  
– Forrester Wave Leader
- **Dynamic Case Management**  
– Forrester Wave Leader
- **Case Management Frameworks**  
– Gartner MQ Leader
- **Business Content Services**  
– Forrester Wave Leader



## In Short

IBM provides the most integrated set of ECM capabilities in the industry

Our ECM platform supports open standards and integrates with non-IBM repositories

New partnerships will enable you to leverage cloud capabilities in a hybrid environment

Analytics, Cloud, Mobile, and Collaboration are critical Digital Business enablers – but lack of focus on innovation leaves some businesses behind





# Learn more about IBM Smarter Content Solutions

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[www.ibm.com/thatsecm/](http://www.ibm.com/thatsecm/)

धन्यवाद

Hindi

ขอบพระคุณ

Thai

多謝

Traditional Chinese

Спасибо

Russian

Gracias

Spanish

شكراً

Arabic

Thank You

English

Obrigado

Brazilian Portuguese

Grazie

Italian

Danke

German

Merci

French

நன்றி

Tamil

多谢

Simplified Chinese

감사합니다

Korean

ありがとうございました

Japanese