

Agile ECM

Gain Control of Your Content and Optimize with
Rapid Delivery of Innovative Solutions

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Organizations Want Agility for Better Outcomes

IBM Information
>>> On Demand

Reduce Costs

- Automate manual processes
- Reduce complexity
- Reduce the cost of change
- Reduce errors and exceptions
- Minimize cost of legal and regulatory compliance

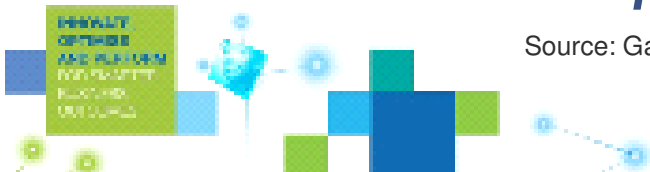


Increase Flexibility

- Reduce process cycle times
- Implement faster change
- React quickly to threats and opportunities
- Reduce risk and respond rapidly to changing regulatory and legal requirements

CIO's top priority over last three years:
“Improving Business Processes”

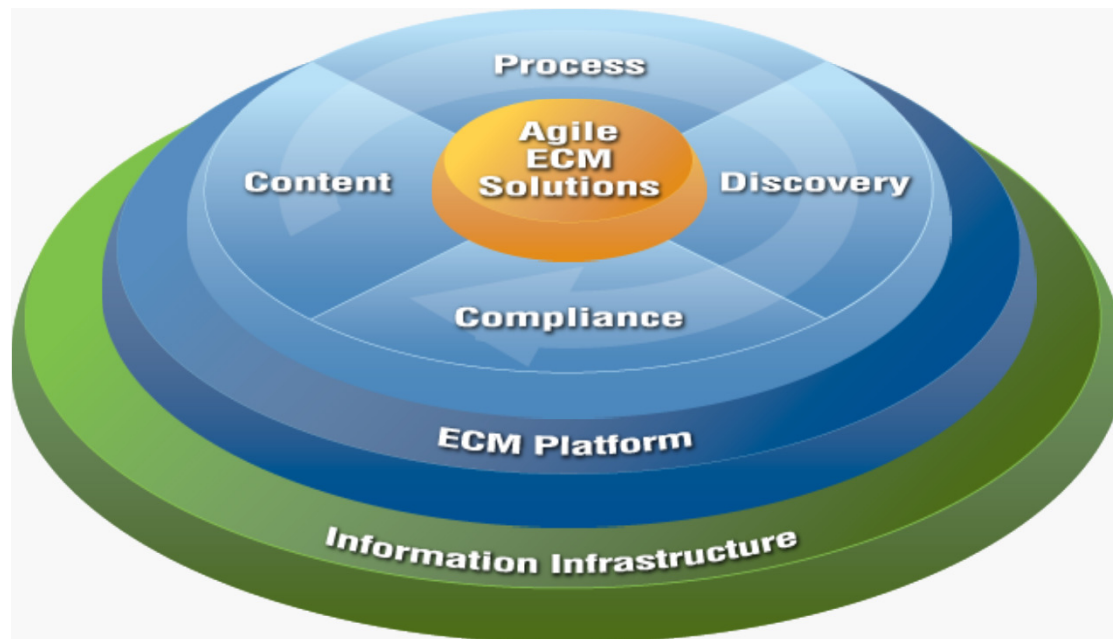
Source: Gartner, “Making the Difference: The 2008 CIO Agenda,” Jan. 2008



IBM Agile ECM

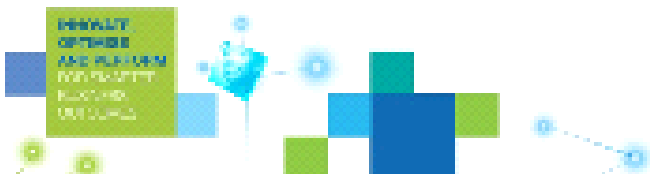
empowering better decisions faster

IBM Agile ECM helps companies make *better decisions faster* by:



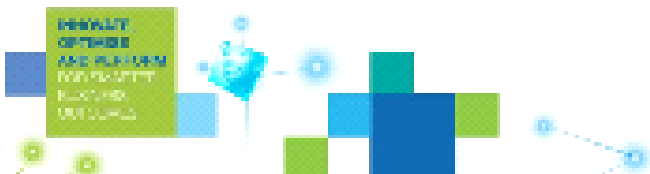
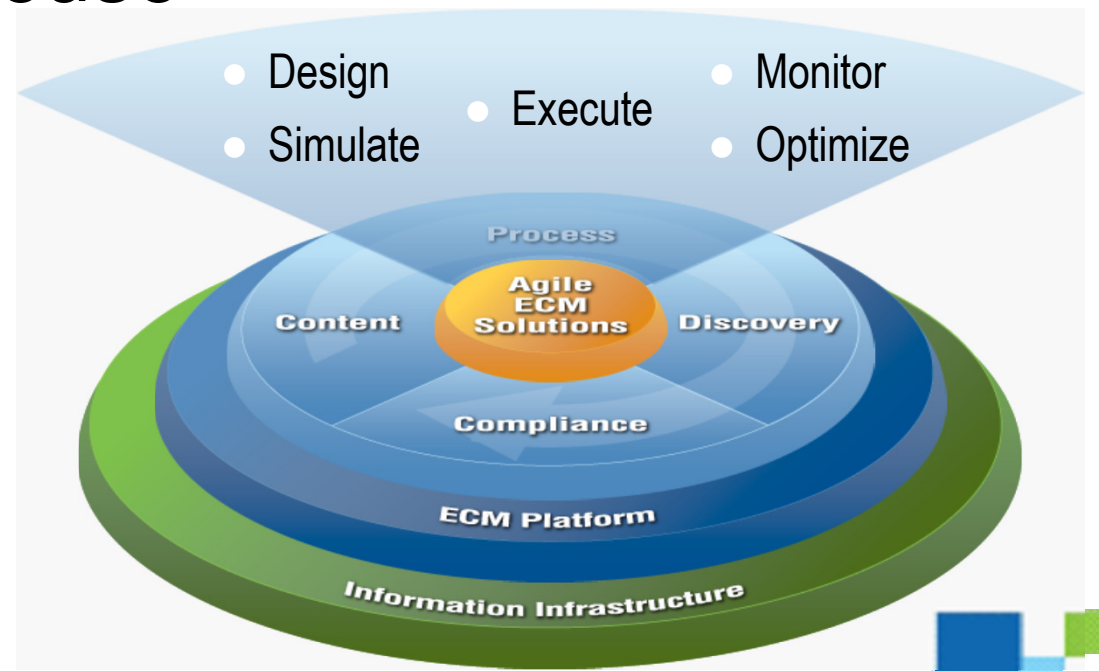
- Managing all forms of content
- Optimizing associated business processes
- Enabling compliance
- Deriving insight from content

through an integrated information infrastructure



IBM Agile ECM Content-centric BPM

- Supports Rapid Application Development
- Increases Business/IT Collaboration
- Promotes asset reuse



Foundationally Sound Business Agility

Putting enterprise content under control and making them work



Example Case Management – All The Right Information

IBM Information
>>> On Demand

...At the Moment it Matters Most



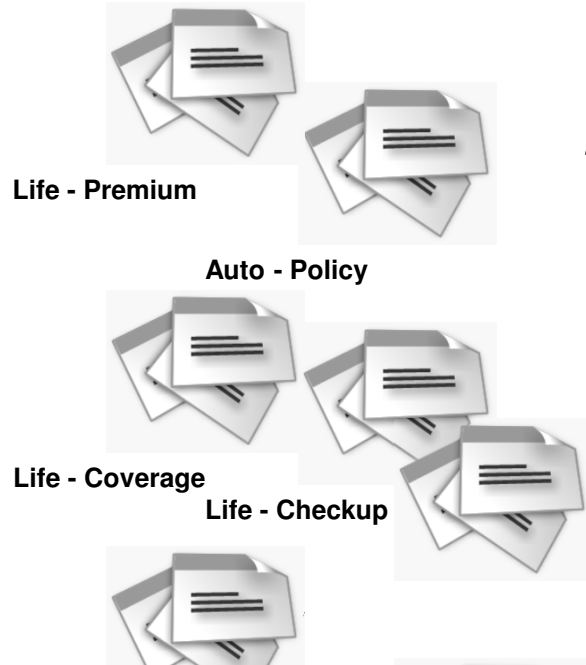
The Benefits ...

- Single point of access for all associated content
- Leverage data from existing enterprise systems and applications
- Users can make better decisions, faster



Example Intelligent Case Classification

Organizing Information to make it Readily Accessible



- Home
- Auto
- The Benefits ...
1. Finds relevant information in you enterprise
 2. Information is automatically extracted from documents
 3. Cases are created as required, in real time
 4. Filing of content is seamless
 5. Corporate retention policies are enforced

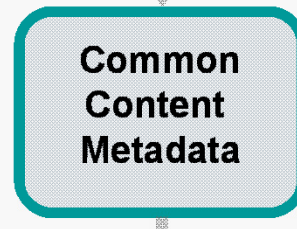
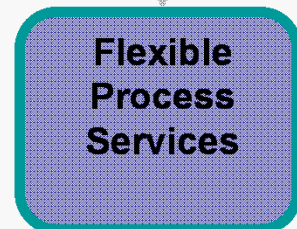
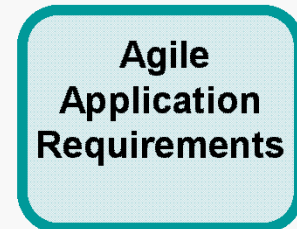
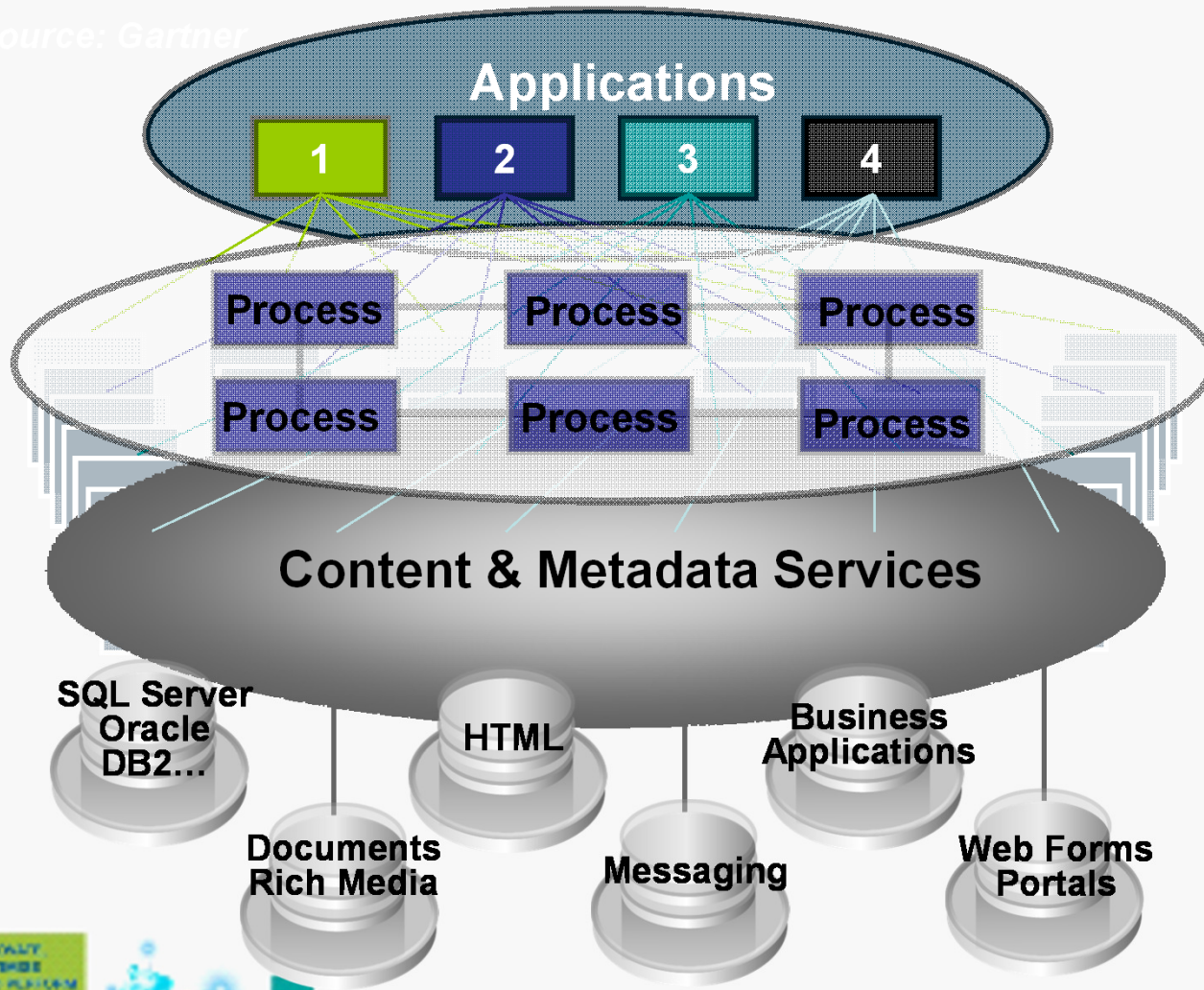
Policy: Home



Organizations value Process Agility Accessing the right Information is key

IBM Information
>>> On Demand

Source: Gartner



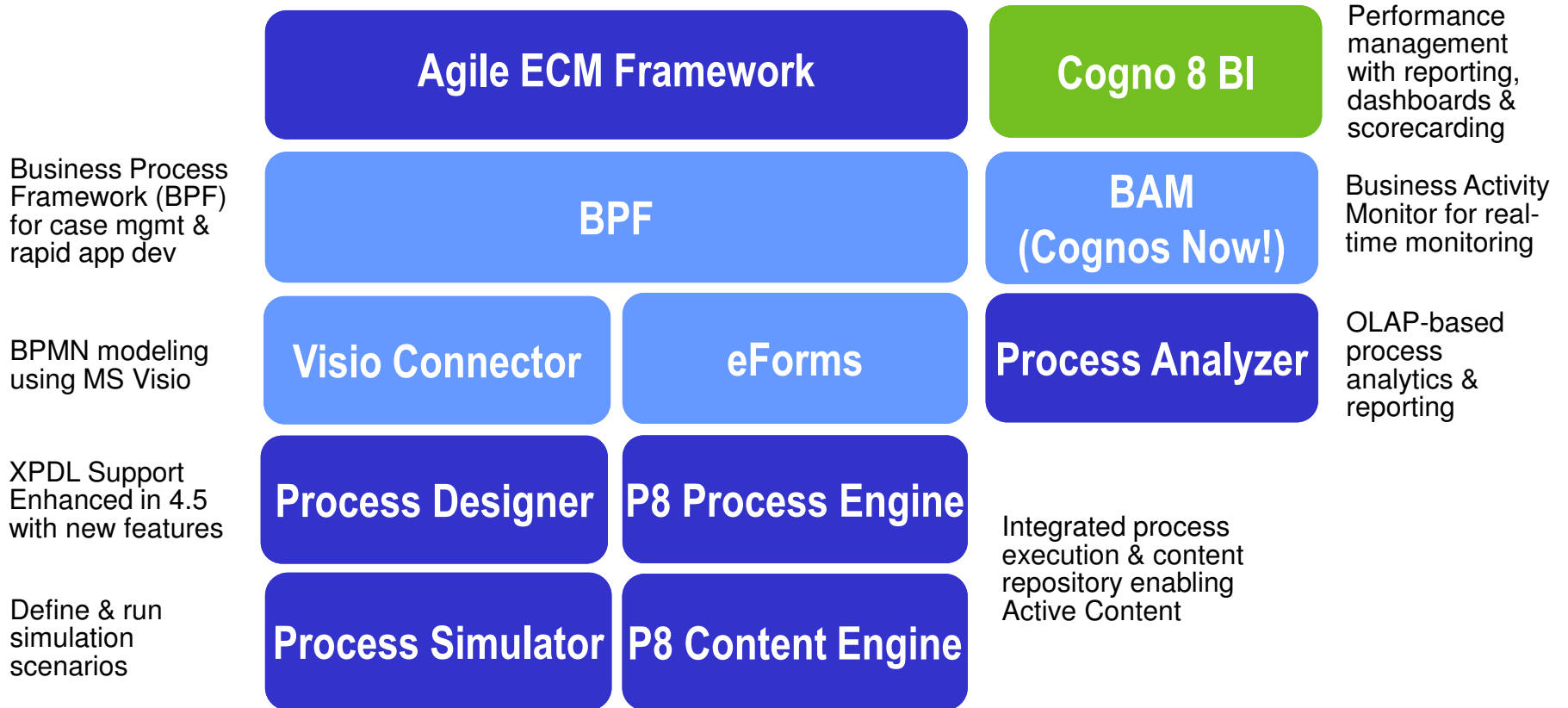
IBM FileNet Business Process Manager V4.5

Rapid delivery of innovative solutions



IBM FileNet Business Process Management Suite V4.5 Overview

Leverages Web 2.0 Mashups & Widgets for building Flexible UI elements



INNOVATE,
OPTIMISE
AND PERFORM
FOR SMARTER
BUSINESS
OUTCOMES

So what technology
is right for me?

Business Process Framework



- Process worker focused
- Point solutions
- In use at many customers around the world



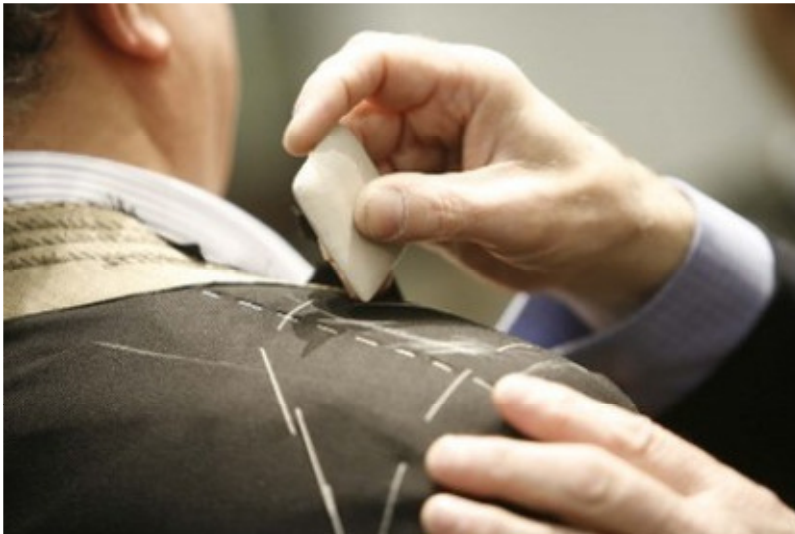
ECM Widgets



- Collaborative
- Reusable
- Component-based
- Business focused solutions
- Comparatively new



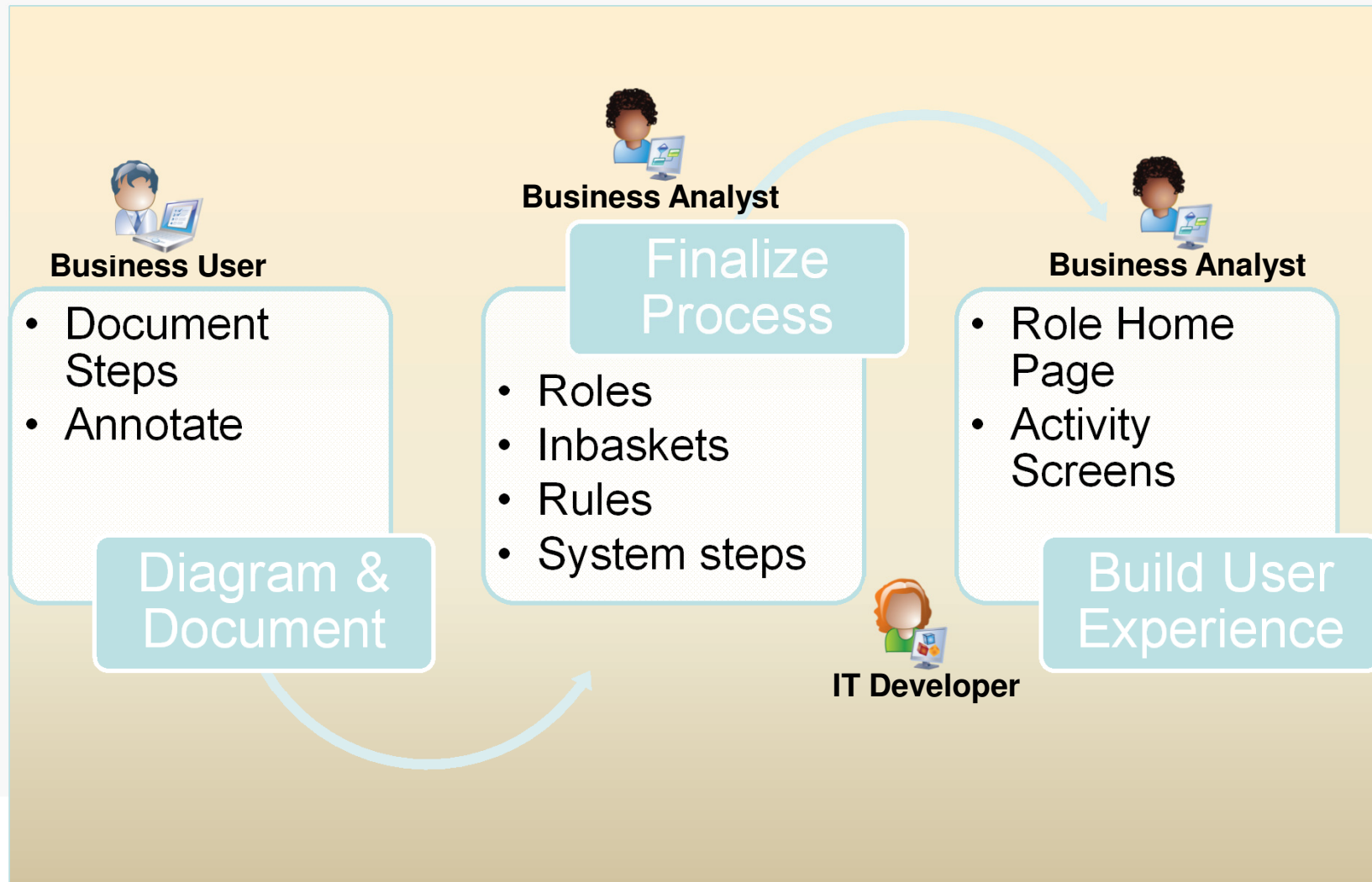
Custom Applications



Greater technical
flexibility and
control at a higher
cost



Application Development Stages



Application Development Stages

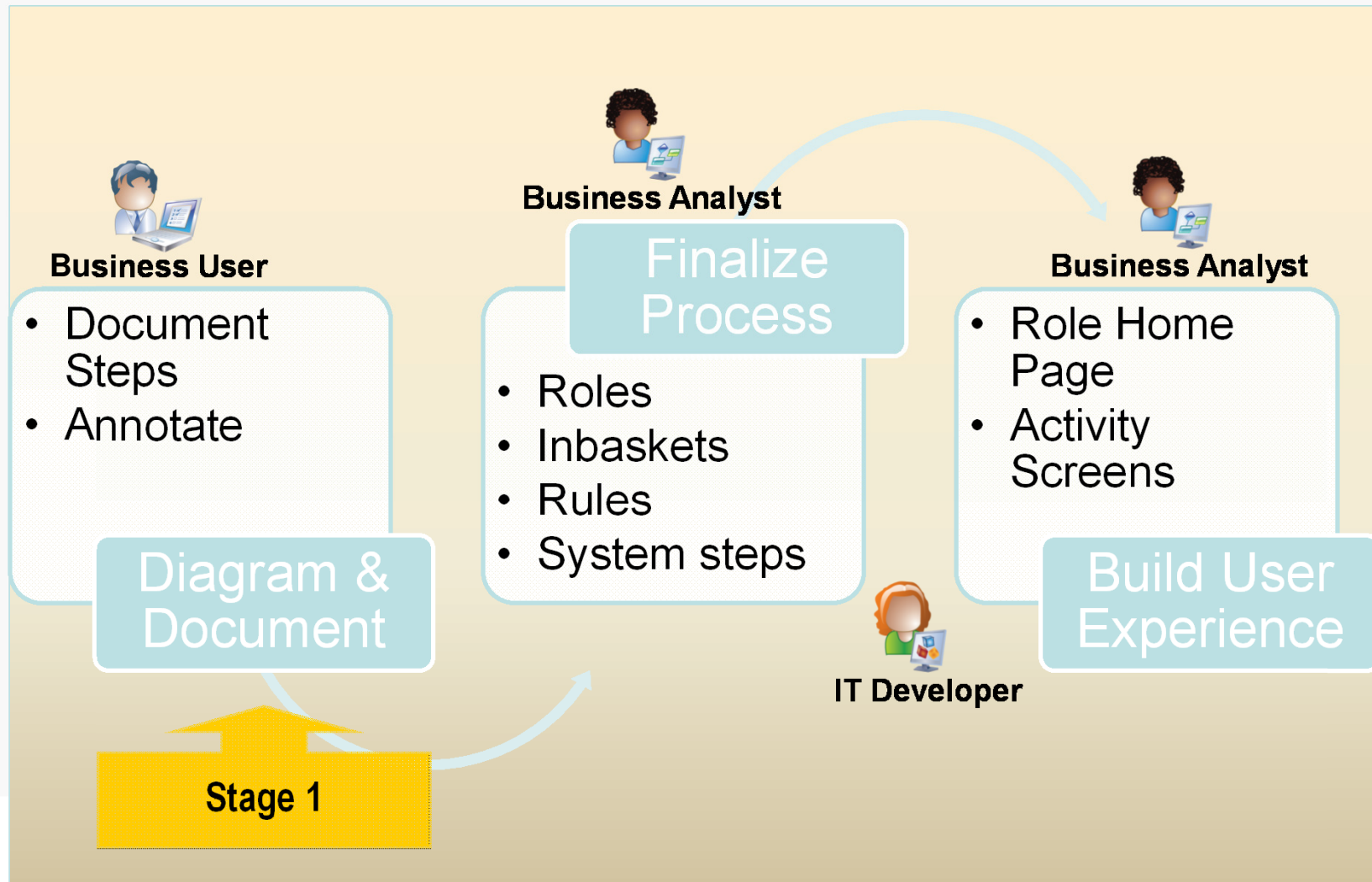
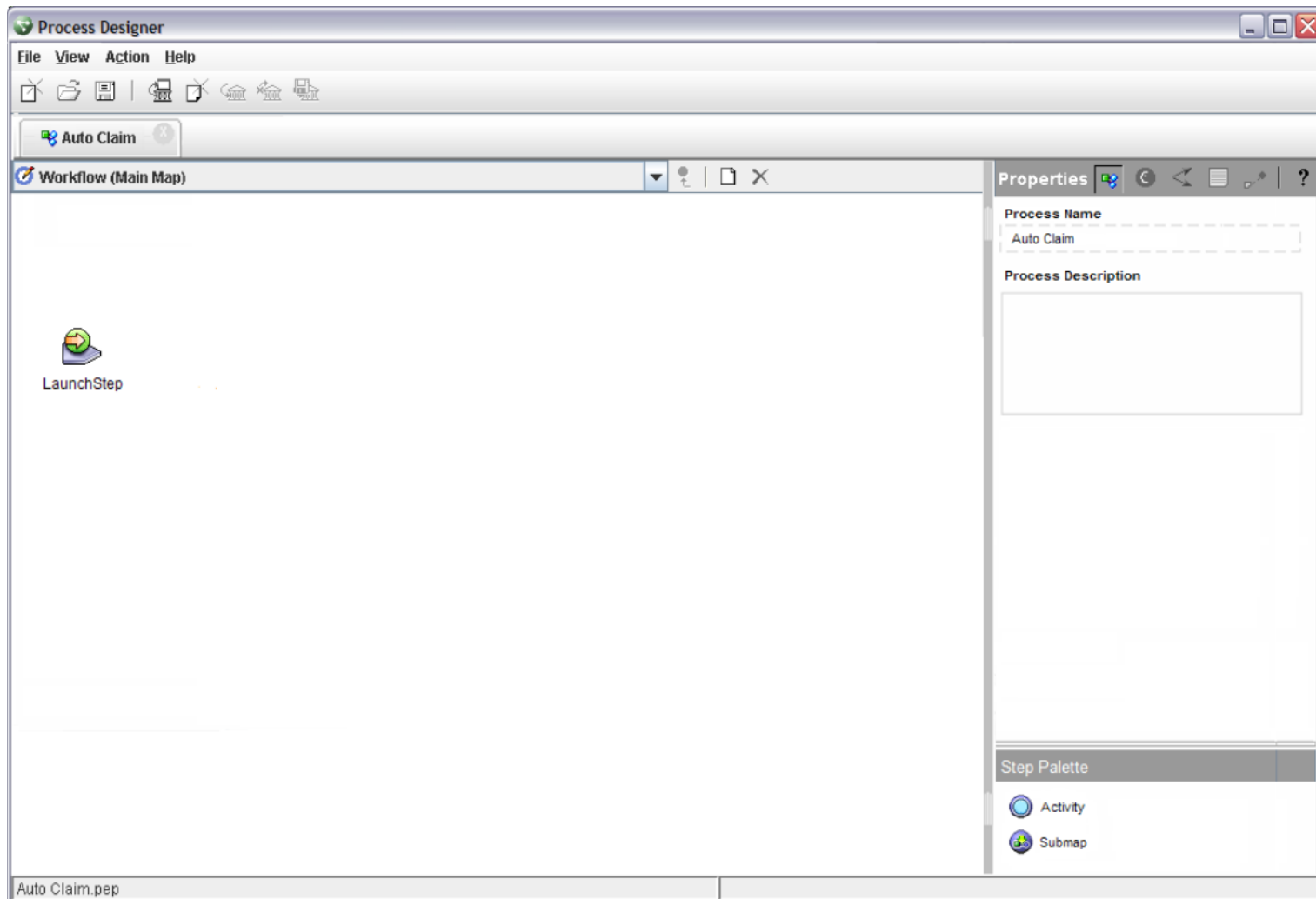


Diagram and Document Mode

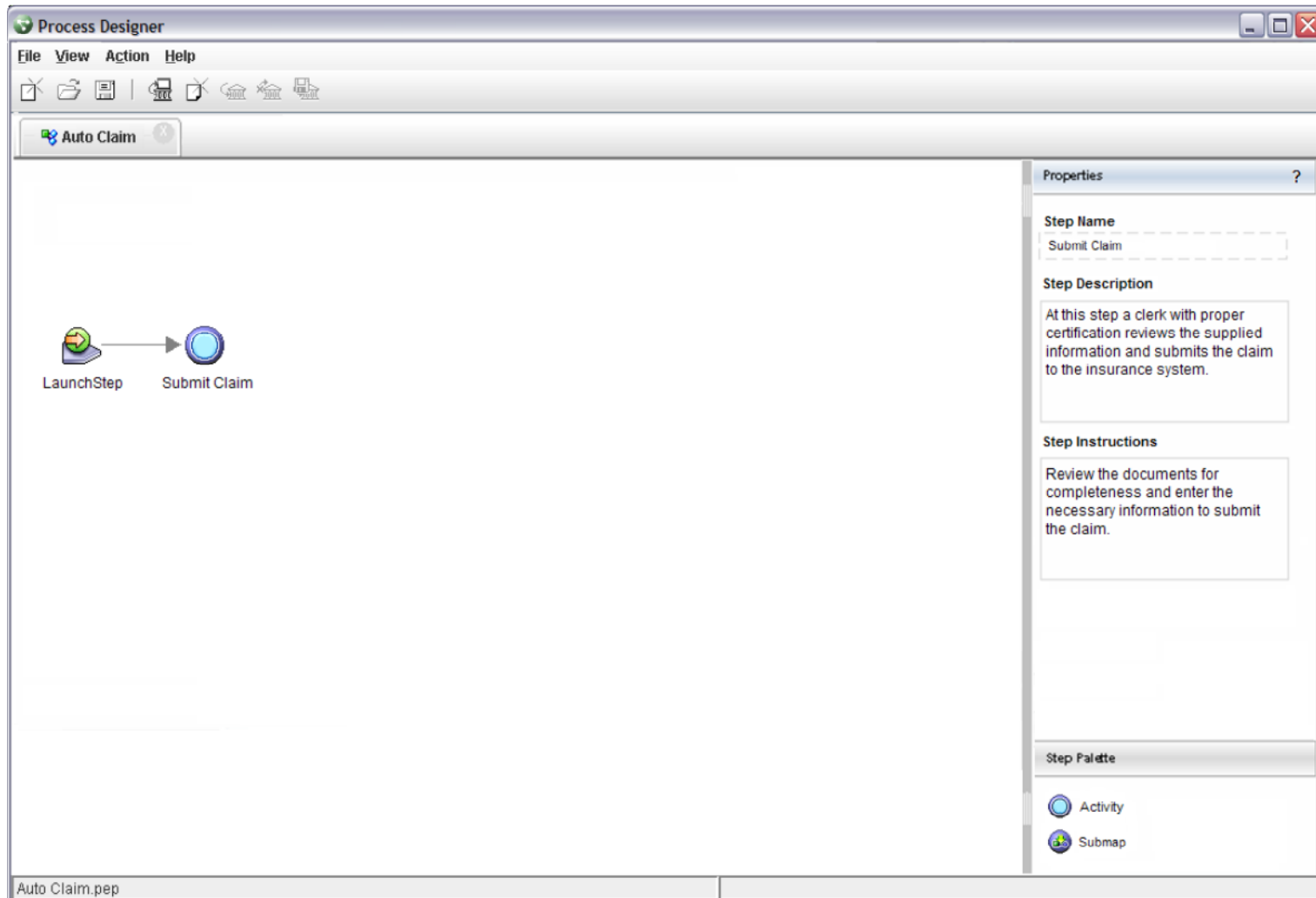
- This mode in the Process Designer allows a business user to easily draw out their processes without having to worry about the technical details behind them
- This mode, controlled by user access rights, hides most of the more complex configuration user interface



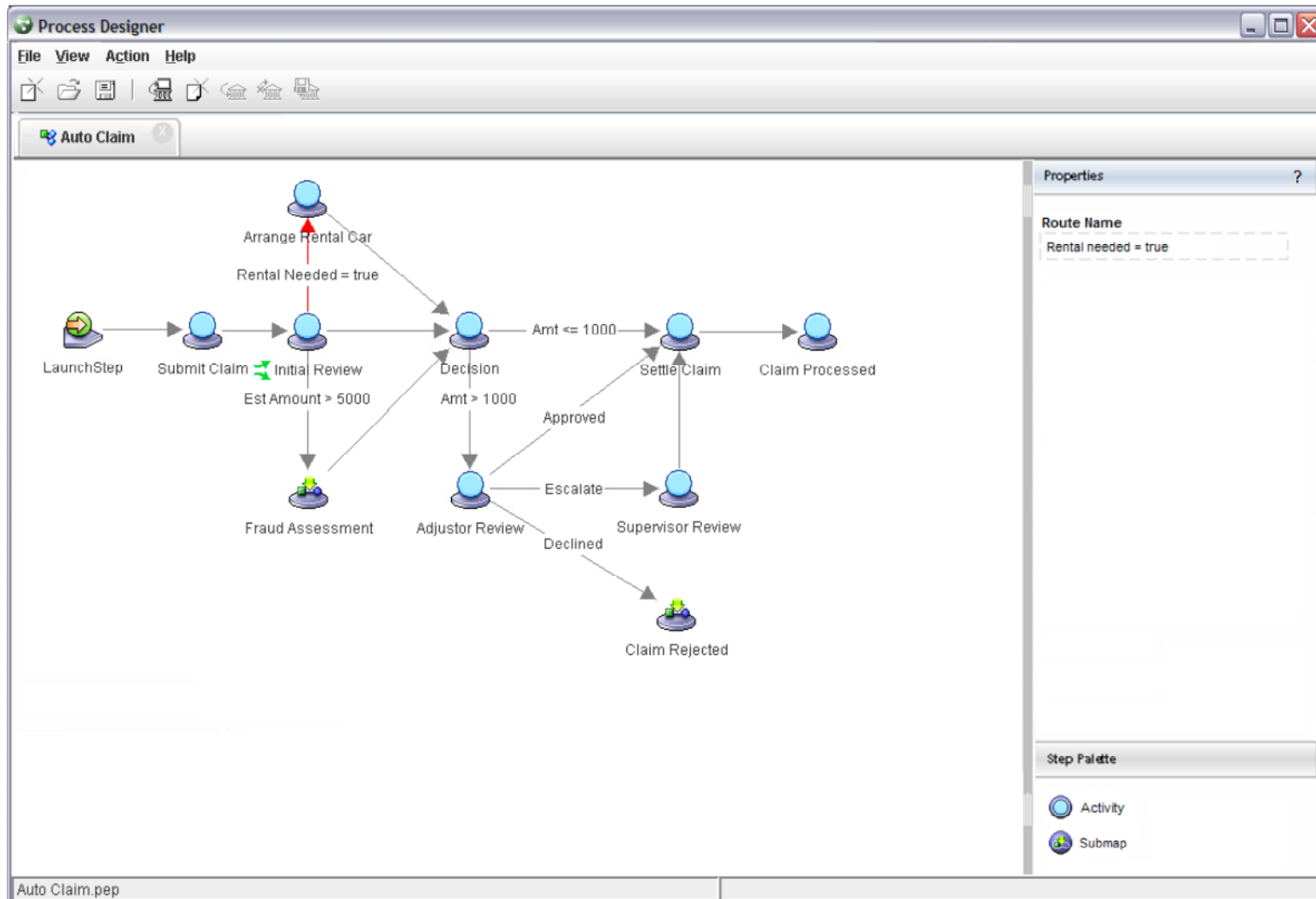
Create a new process in the simplified Diagram Mode



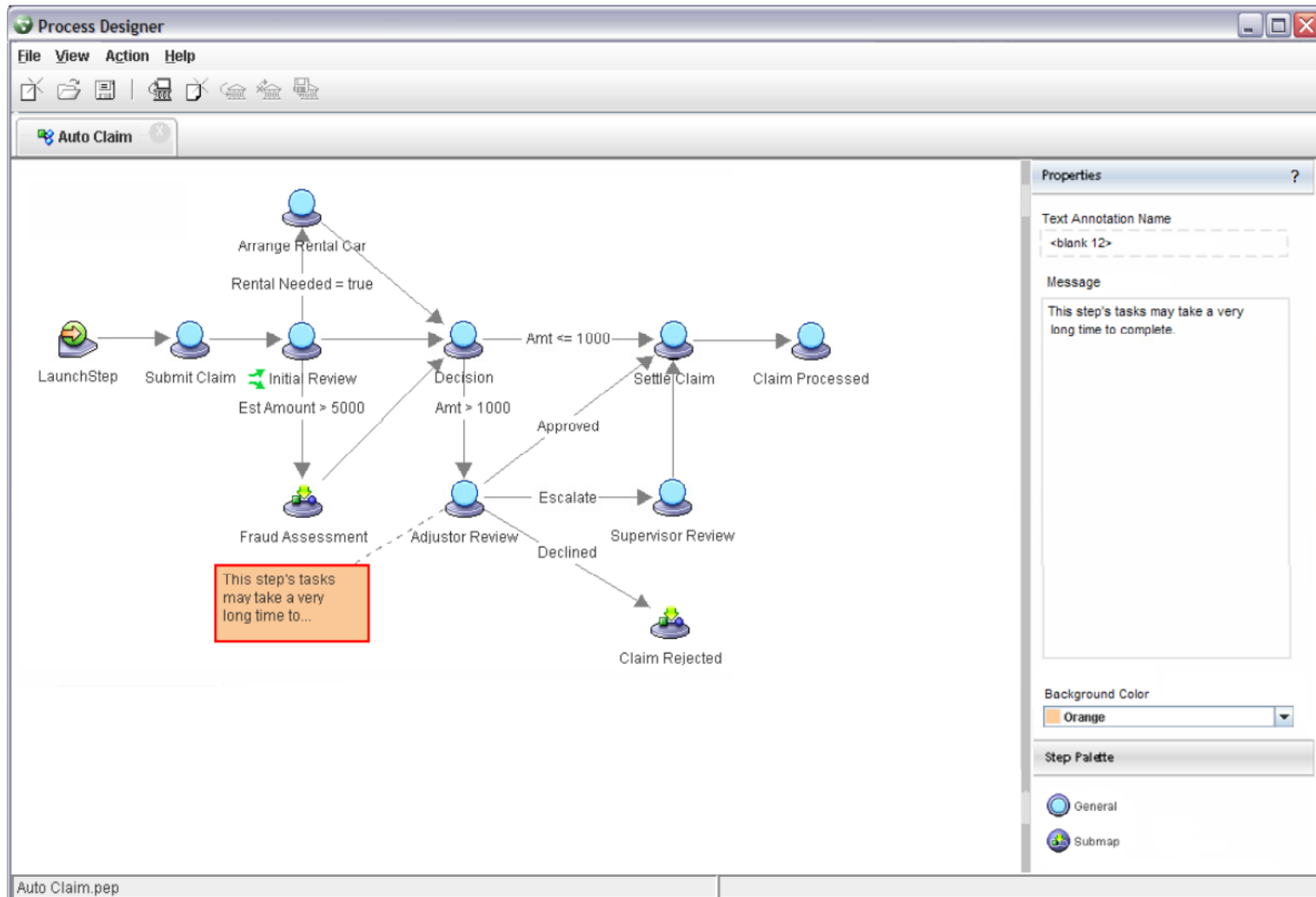
Create and document a new activity



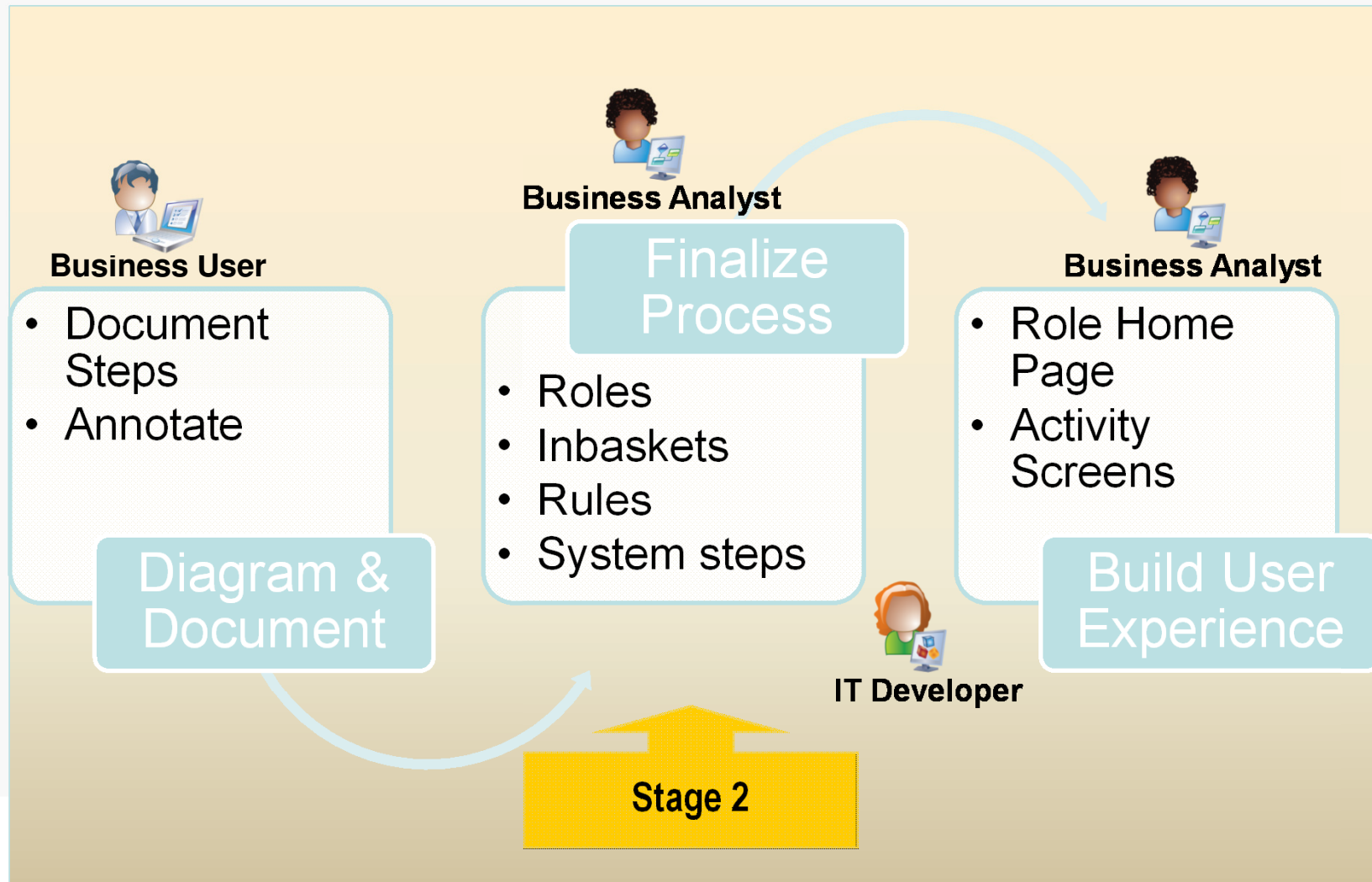
Enter routing and labels



Add annotations



Application Development Stages

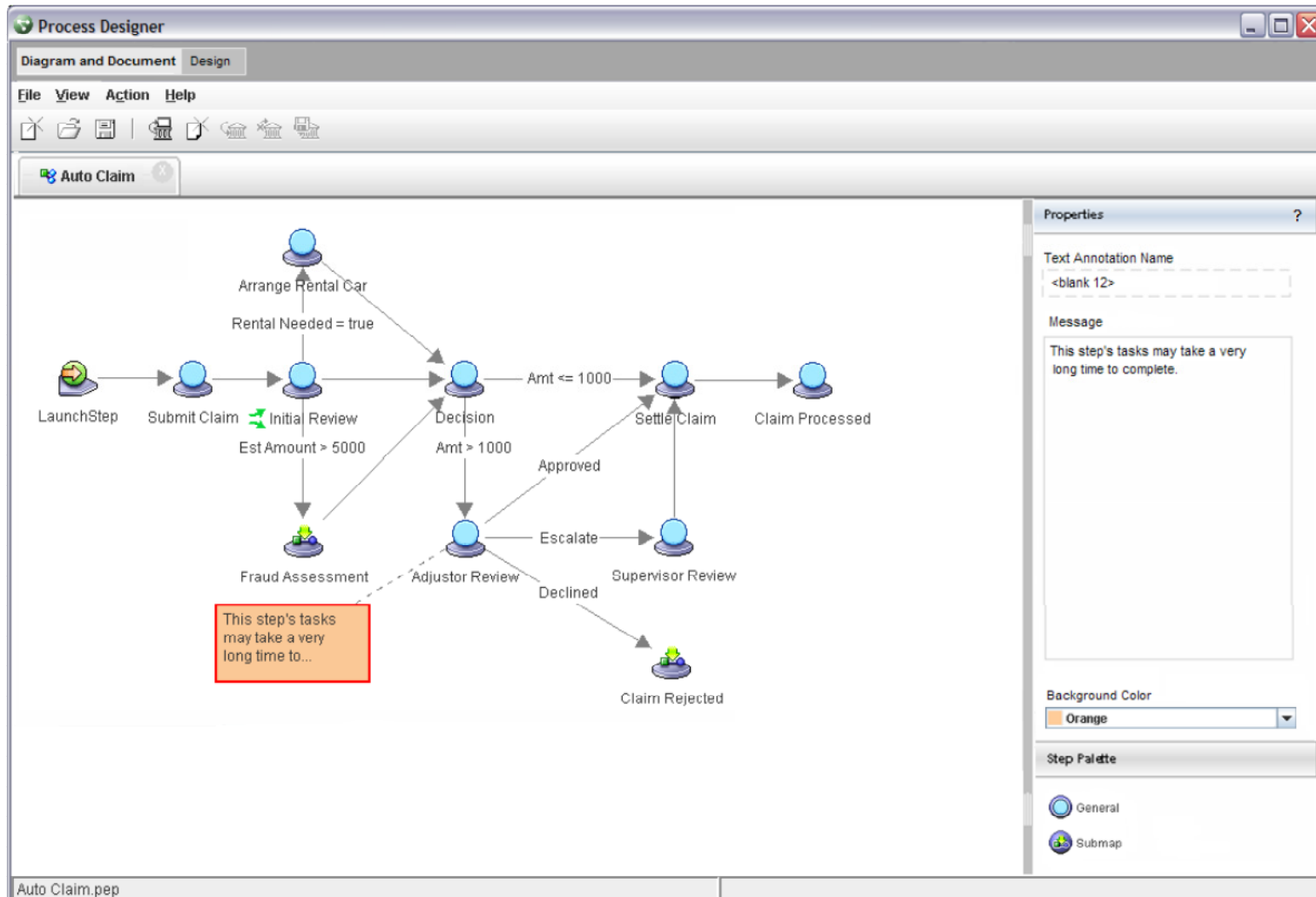


Finalize Process Configuration

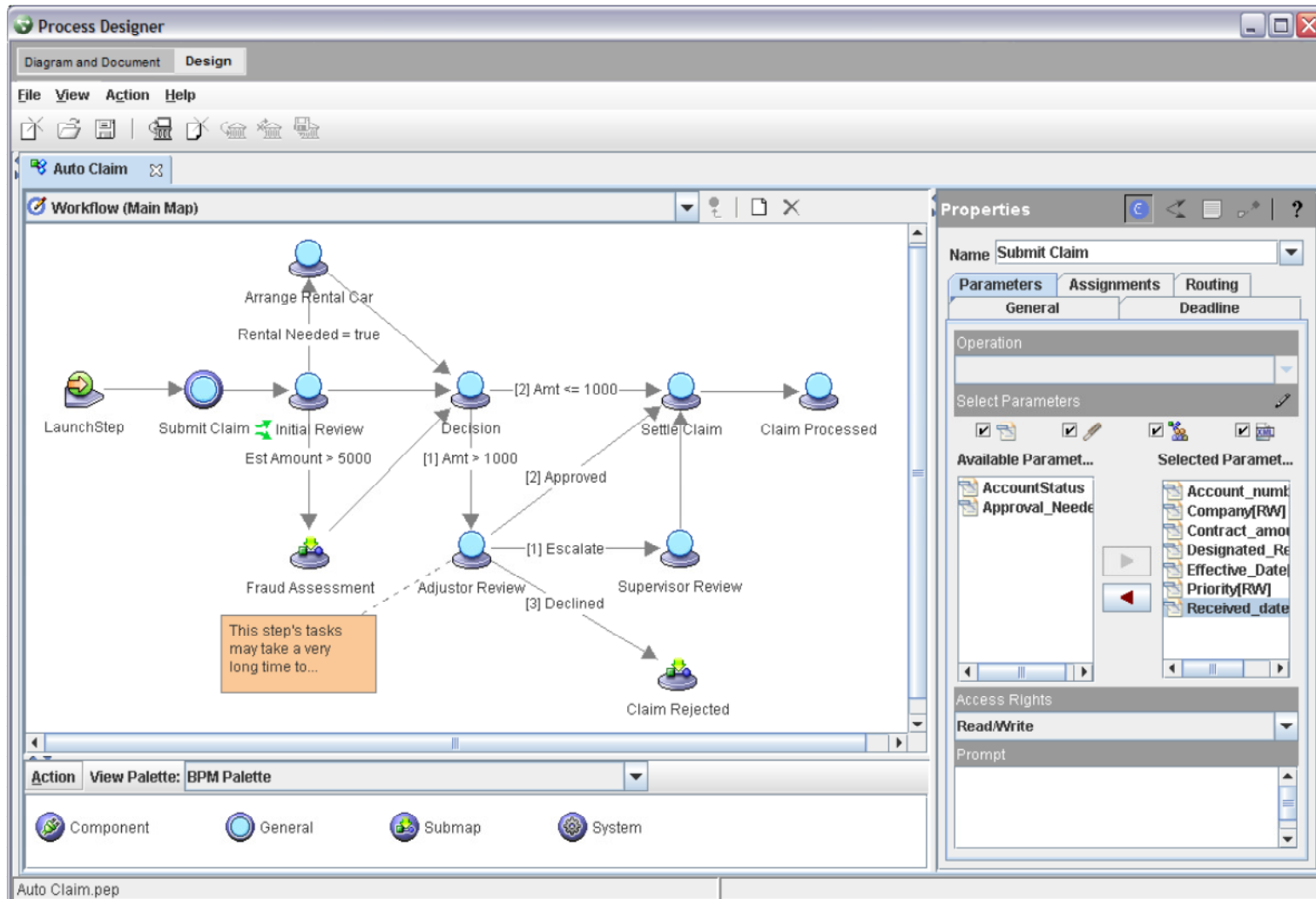
- Targeted at the business analyst user
- Same process diagram now displayed in the full Design mode
- Access to the Design mode controlled by user access rights
- Allows iterative approach (no export / import required)



Business Analyst opens process document



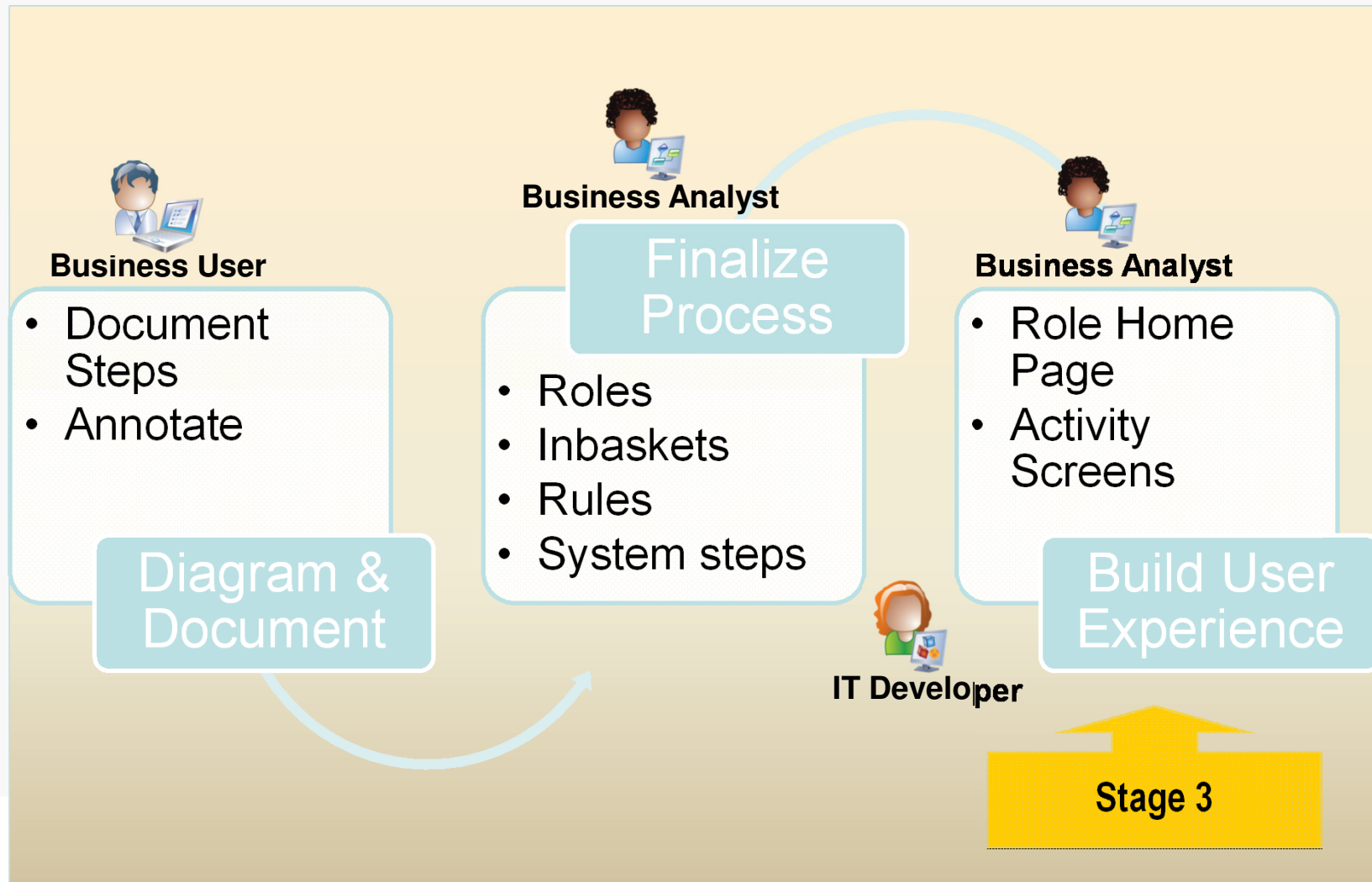
Switches into Design Mode



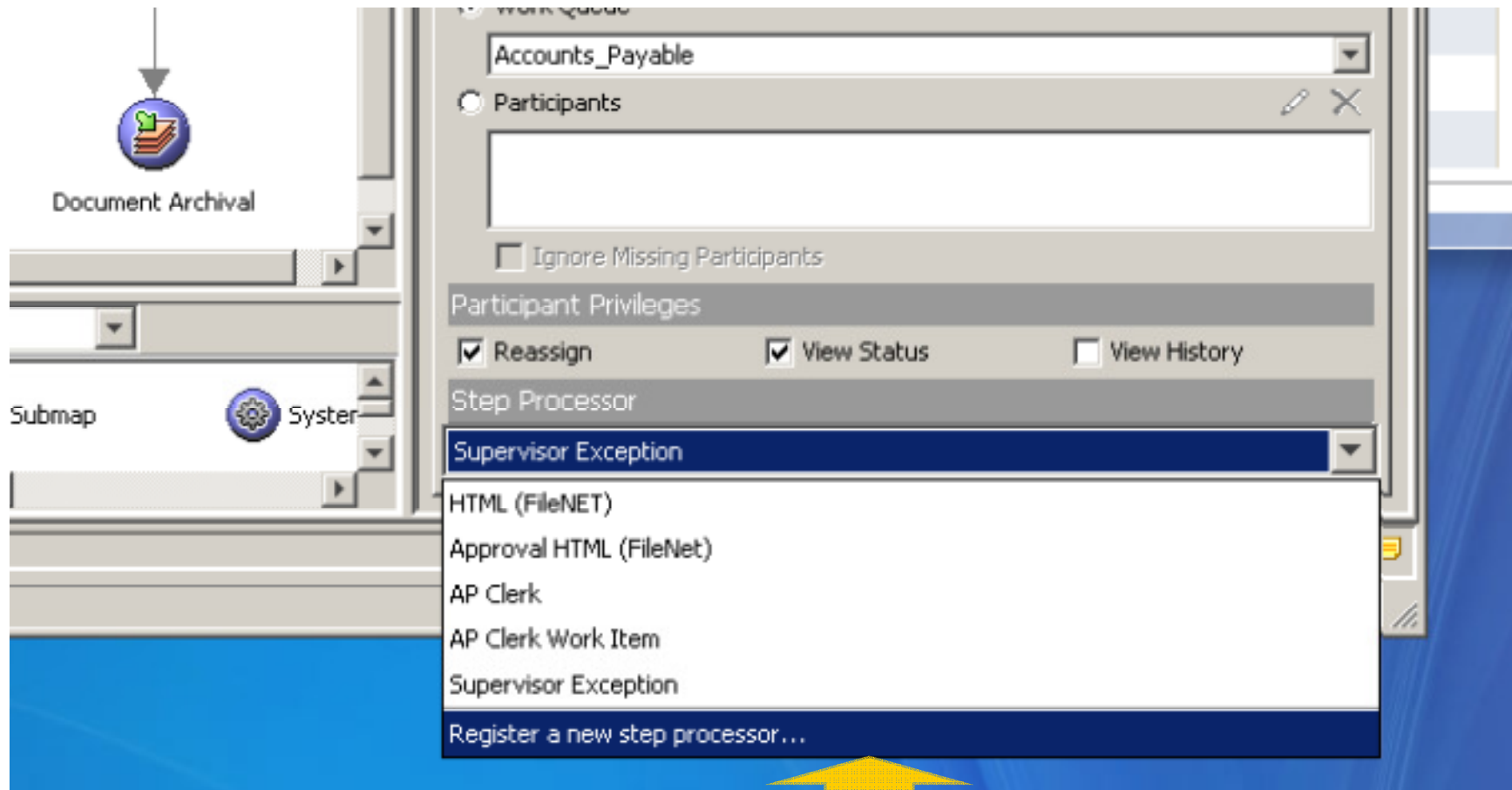
Complete the configuration behind the process

The screenshot displays the IBM Process Designer interface. The main workspace shows a workflow diagram for 'Auto Claim'. The workflow starts with a 'LaunchStep' leading to a 'Submit Claim' step. From 'Submit Claim', the process flows to 'Initial Review'. A decision point follows 'Initial Review' based on 'EstAmount > 5000'. If true, it goes to 'Fraud Assessment', which then leads to 'Adjustor Review'. If false, it goes to 'Decision'. From 'Adjustor Review', there are three paths: '[1] Escalate' to 'Supervisor Review', '[2] Approved' to 'Settle Claim', and '[3] Declined' to 'Claim Rejected'. From 'Decision', there are two paths: '[1] Amt > 1000' to 'Adjustor Review' and '[2] Amt <= 1000' to 'Settle Claim'. 'Supervisor Review' also leads to 'Settle Claim'. 'Settle Claim' leads to 'Claim Processed'. A callout box points to the 'Adjustor Review' step with the text: 'This step's tasks may take a very long time to...'. The 'Properties' panel on the right is open to the 'Work Queue' section, where 'Submit Claim' is selected in a dropdown menu. Other sections in the properties panel include 'General', 'Deadline', 'Participants', 'Participant Privileges', and 'Step Processor'.

Application Development Stages



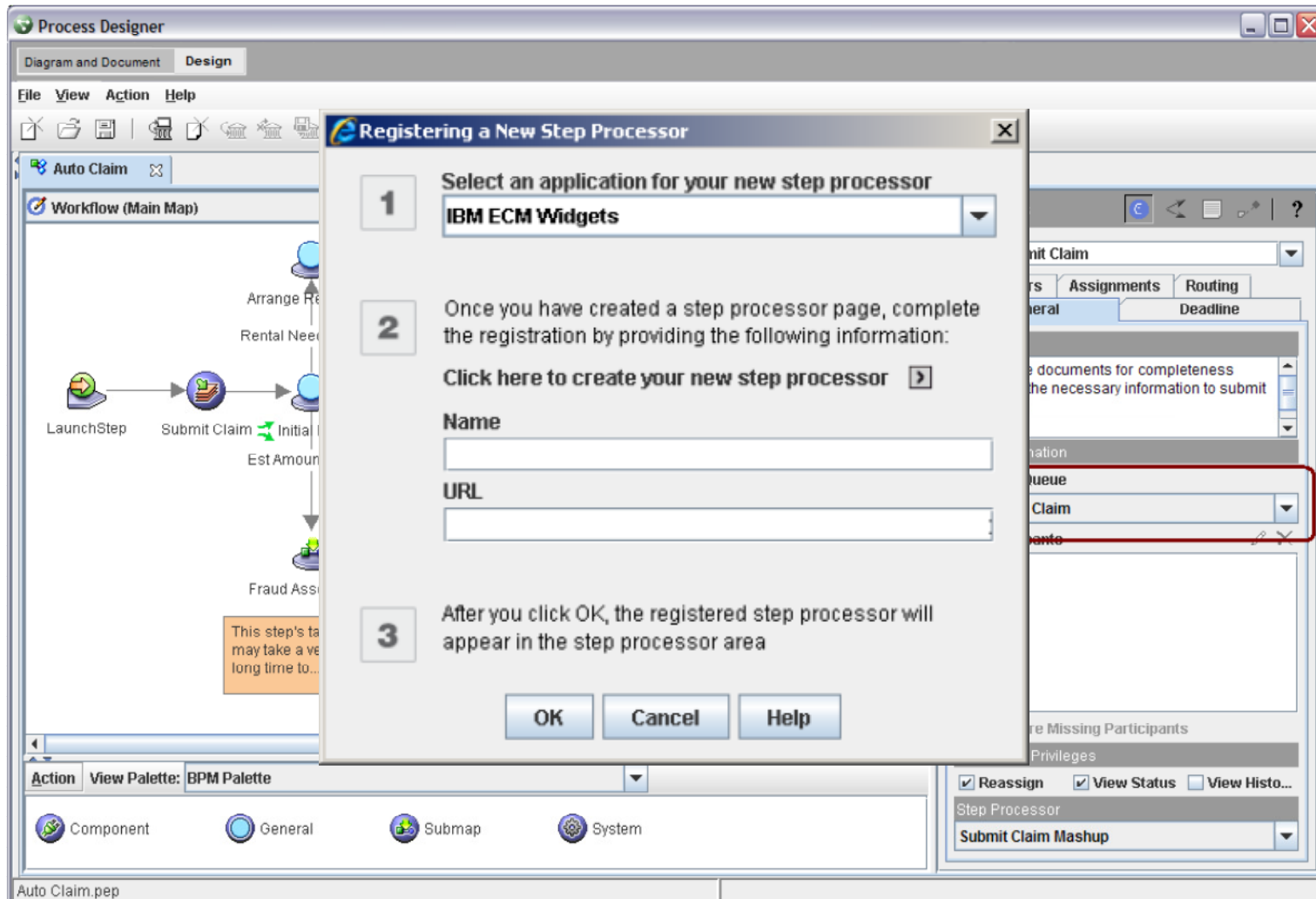
Creating a new mashup Step Processor



New Command

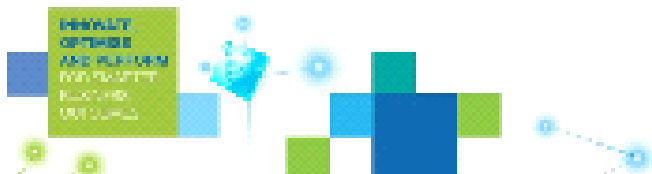
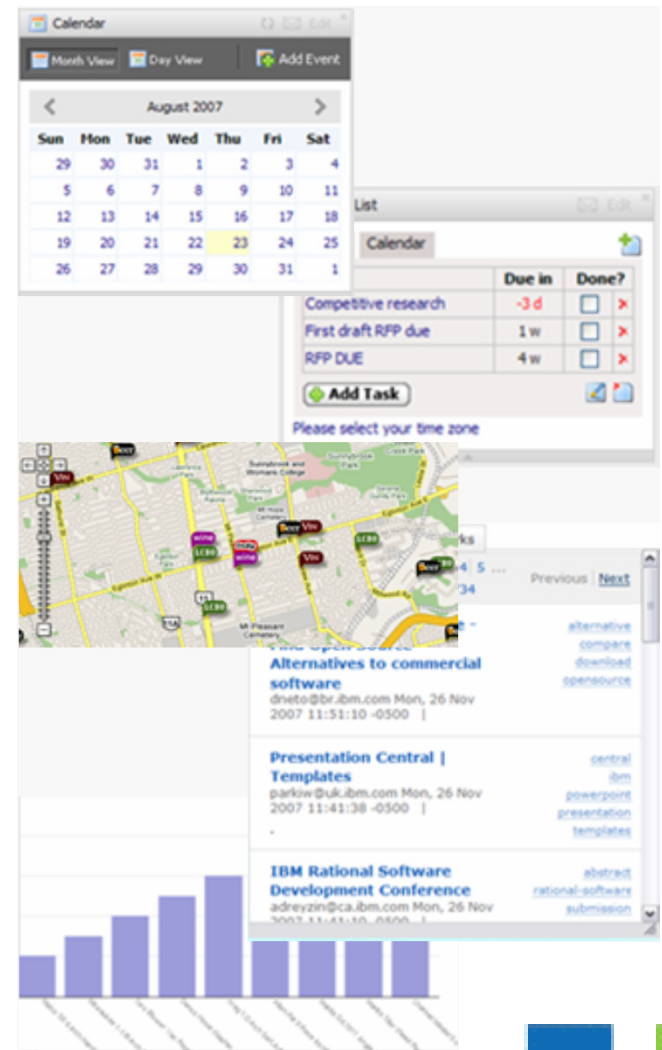


Create a new Mashup Step Processor



What is a Widget?

- A **widget** is a small application or piece of dynamic content that can be easily placed into a web page
- Widgets are called different names by different vendors: gadgets, blocks, flakes
- Widgets can be written in any web language or and can be simply HTML
- “Mashable” widgets pass events, so that they can be wired together to create something new

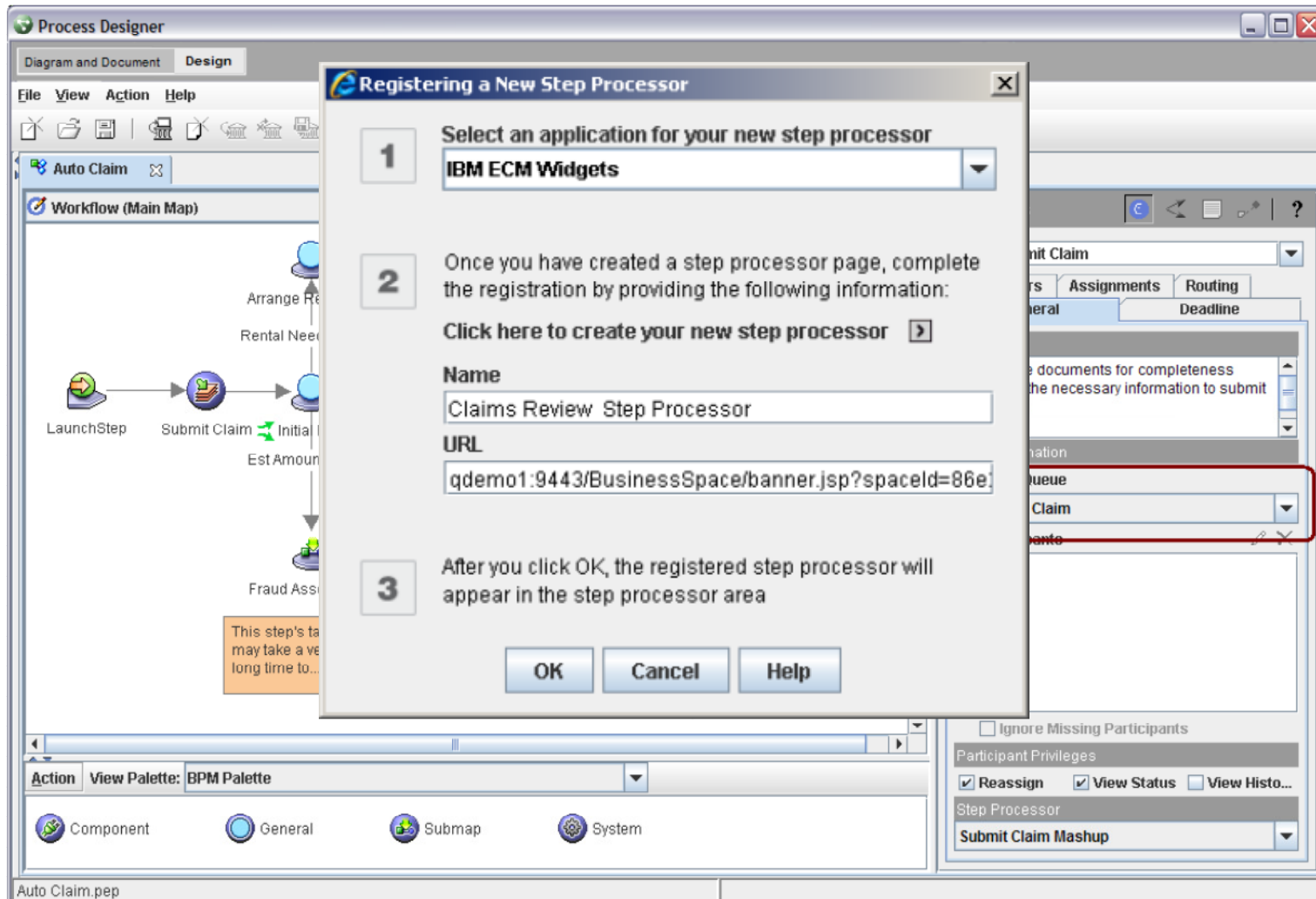


IBM FileNet BPM 4.5.1

- What's new?
 - Websphere Business Space as included mashup container
 - Business Space compatible version of the ECM 4.5 widgets
 - Additional widgets
 - ECM Content List Widget
 - ECM Work Data eForm
 - Widget Enhancements
 - Improved ECM Toolbar configuration
 - Automatically view attachment in ECM Viewer
 - New installation and configuration tool



Register the new Mashup Step Processor



Assemble a new Mashup Step Processor

BusinessSpace Welcome Joe | Help | Logout

New Account Supervisor Manage Business Spaces

Accounts | New Account | Review | Approve | New Page

Header
Index
Subject: Case Management Workflow
Deadline: View instructions

Work Data

Account Number: 938498349
Company Name: Spifty Limited
Contract Amount: 9,000,000
Home Address: 10 Somers Crescent, London SW1
Home ZipCodes: 100085
 Is Rejected

Attachments
Actions
Paper: Add
Documents: Add
Paper1

Step Completion
Save | Select a response | Complete | Close

Document Viewer

Document ID: J4528 | Date: 8-2-02

SECTION B: Information Regarding Applicant

Applicant Name: *Robin Jean*
Address: *127 S Blvd Las Vegas NV 89029*
City: *Las Vegas* | State: *NV* | Zip: *89029*

SECTION C: Information Regarding Spouse or Co-Applicant

Spouse Name: *Walter*
Address: *905 Industrial Ave Las Vegas NV*
City: *Las Vegas* | State: *NV* | Zip: *89102*

POOR QUALITY

Page 1 of 1...

Assign the Mashup Step Processor to the step

The screenshot displays the IBM Process Designer interface. The main workspace shows a workflow diagram for 'Auto Claim'. The steps are: LaunchStep, Submit Claim, Initial Review, Decision, Arrange Rental Car, Fraud Assessment, Adjustor Review, Supervisor Review, Settle Claim, and Claim Processed. Transitions are labeled with conditions like 'Rental Needed = true', 'Est Amount > 5000', '[2] Amt <= 1000', '[1] Amt > 1000', '[2] Approved', '[1] Escalate', and '[3] Declined'. A callout box points to the 'Initial Review' step with the text: 'This step's tasks may take a very long time to...'. The Properties panel on the right is open to the 'General' tab for the 'Submit Claim' step. It shows the instruction: 'Review the documents for completeness and enter the necessary information to submit the claim.' Under the 'Participants' section, 'Claims Review Step Processor' is selected, and 'Default Mashup' is highlighted in a red box. The bottom of the interface shows the 'BPM Palette' with icons for Component, General, Submap, and System.

Design Mode – In-baskets

Process Designer

File View Action Settings Help

Workflow Definition1 Roles In-baskets

Select a Queue: Submit_Claim

Inbaskets

- Submit Claim
- Expense Processing**
- Approvals

Expense Processing

Description: The Expense Processing Inbasket...

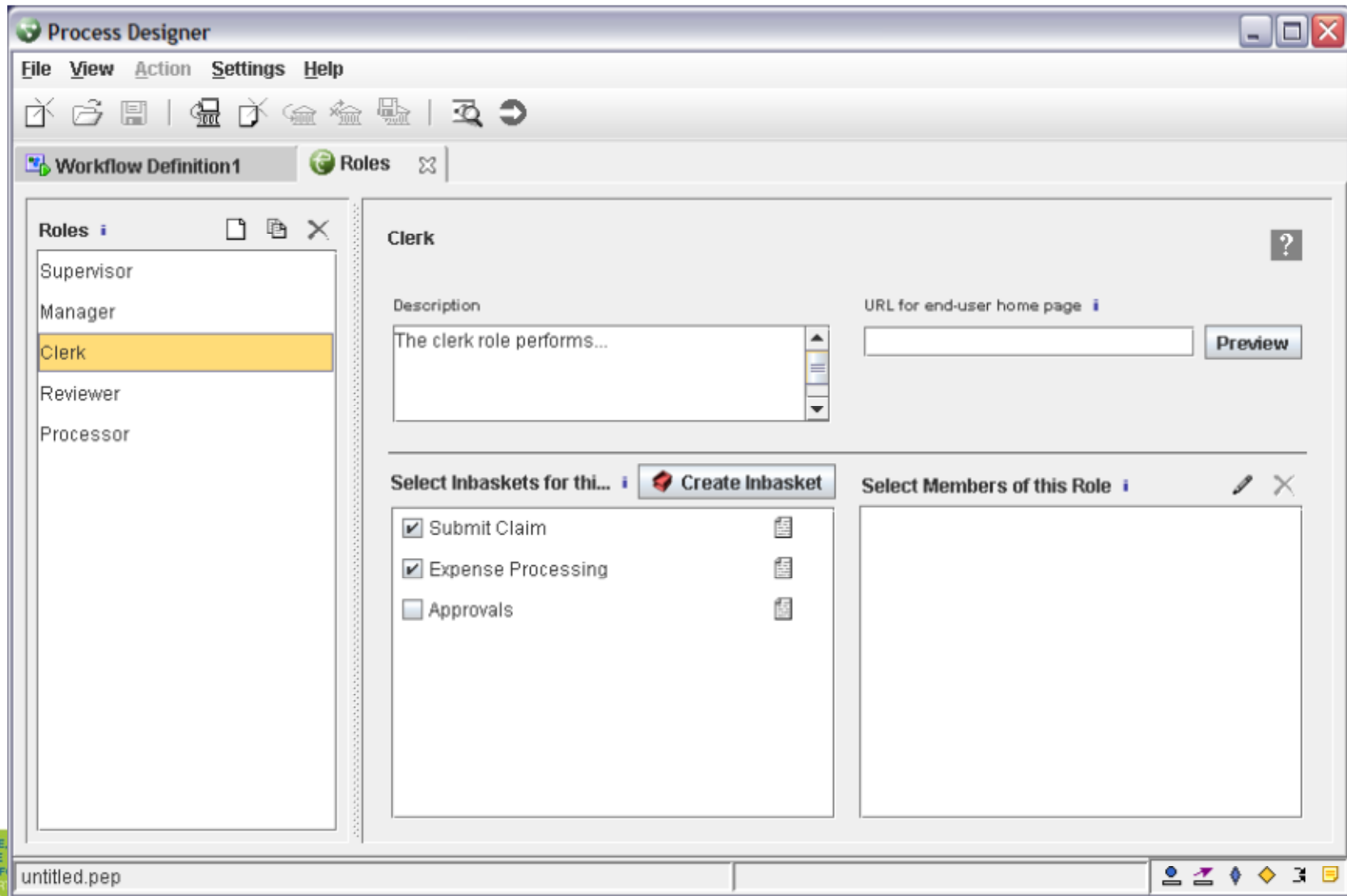
Create Columns and Labels | Create filters | Define Content

Define Inbasket columns for the user interface

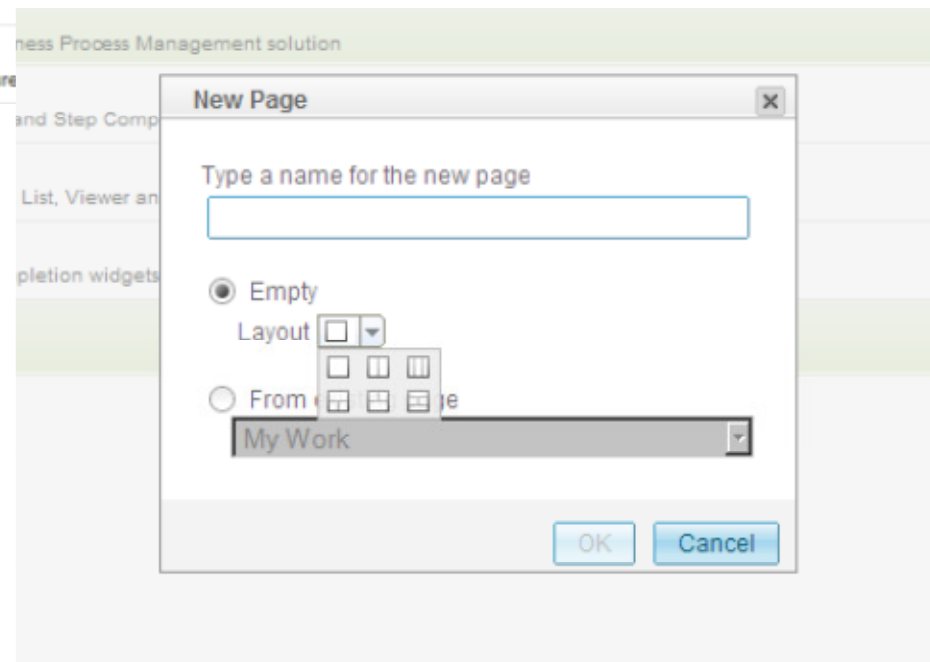
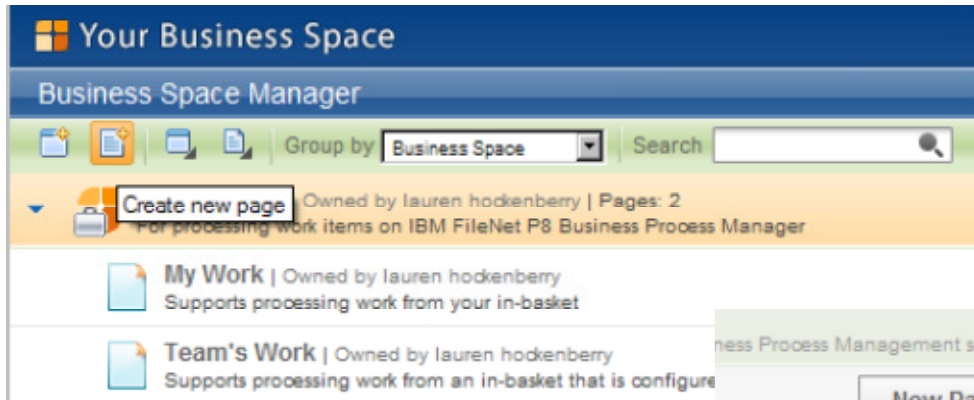
Selected fields	Column label	Sortable	Content order
F_LockMachine (Integer)	F_LockMachine	<input type="checkbox"/>	<none>
F_SortOrder (String)	F_SortOrder	<input type="checkbox"/>	<none>
F_CreateTime (Time)	F_CreateTime	<input type="checkbox"/>	<none>

untitled.pep

Design Mode – Role Definition



Create a Mashup Based Role Home Page



Adding Widgets to the Role Home Page

BusinessSpace | Welcome joe | Help | Logout

New Account Supervisor | Manage Business Spaces

MyWork | Dashboard | New Account | Approve | New Page | Add Widgets

Toolbar | Actions

Inbasket

Submitted (14) | Review (2) | Approve (0)

Filter:

Company Name	Received Date	Address	Account Number	Amount
Acme Corp	9/6/08 5:40 PM	8543 Main St, Chicago, IL	234234234	0
Green Industries	9/6/08 5:40 PM	98 Industrial Way, Markham Ontario	234090900	67,000,000
Spitzer Inc	9/6/08 5:40 PM	9 Harbor Blvd, Costa Mesa CA	29289849	1,000,000
ARCNA	9/6/08 5:40 PM	14 Imperial Ave, New Iberia, LA	34323432	45,000,000,000
Georgetown Industries	9/6/08 5:40 PM	9009 First St, Seattle, WA	23423443	50,000,000
A Better Way	9/30/08 11:29 PM	98 Rue Saint Michelle, Paris France	92893892	20,000,000
Red Hawk	9/30/08 11:29 PM	918990 Miller Ave, Smithville, NV	23899089	10,000,000
Cypress Grove Research	9/30/08 11:29 PM	89289 Jackson St, Vicksburg, MS	394098290	109,039,000
Interior Concepts	9/30/08 11:29 PM	5 Lexington, New York, NY	82779877983	5,000,000
Smart Services	9/30/08 11:29 PM	1049 Merryweather, Glasgow, Scotland	1289389489	10,000
Maggie Consulting	9/30/08 11:29 PM	89898 Spruce, Providence, RI	65438976	100,000
ABC Paper Company	9/30/08 11:29 PM	1 Stark Ave, Portland, OR	2389989823	500,000
Thompson Markham Linley	9/30/08 11:29 PM	76 Stanislaus, Grovetown, CA	1832989892	100,000
Spiffy Limited	9/30/08 11:29 PM	10 Somers Crescent, London SW1	2344322	10,000,000

In-basket Preview

Viewers

- Web Site
- Presentation
- Spreadsheet
- Document
- Web Feed
- Script Adapter

ECM Widgets

- Toolbar
- In-basket**
- Header
- Work Data

Description: Displays the list of in-baskets associated with a role and shows the work items within each in-basket. This widget is used to construct P8 Business Process Management applications.

Owner: International Business Machines Corp.

powered by WebSphere

Configure the Role for the In-basket Widget

In-basket

Set your basic configuration options for the in-basket display.

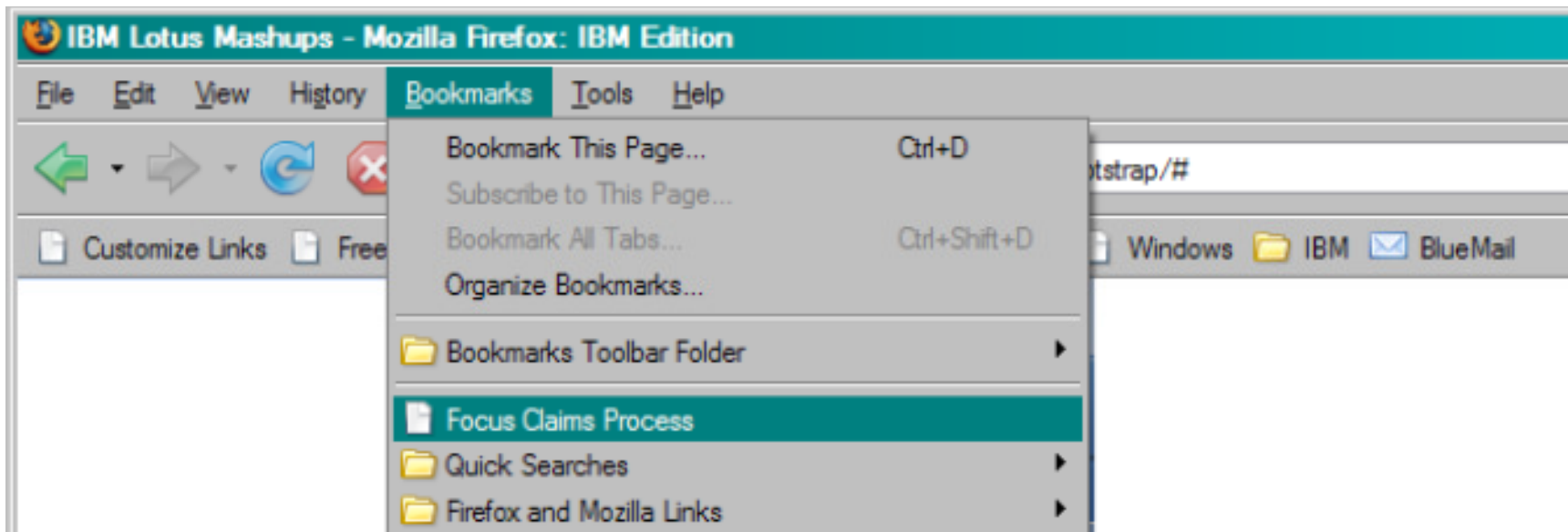
Number of work items to display per page

Select a role

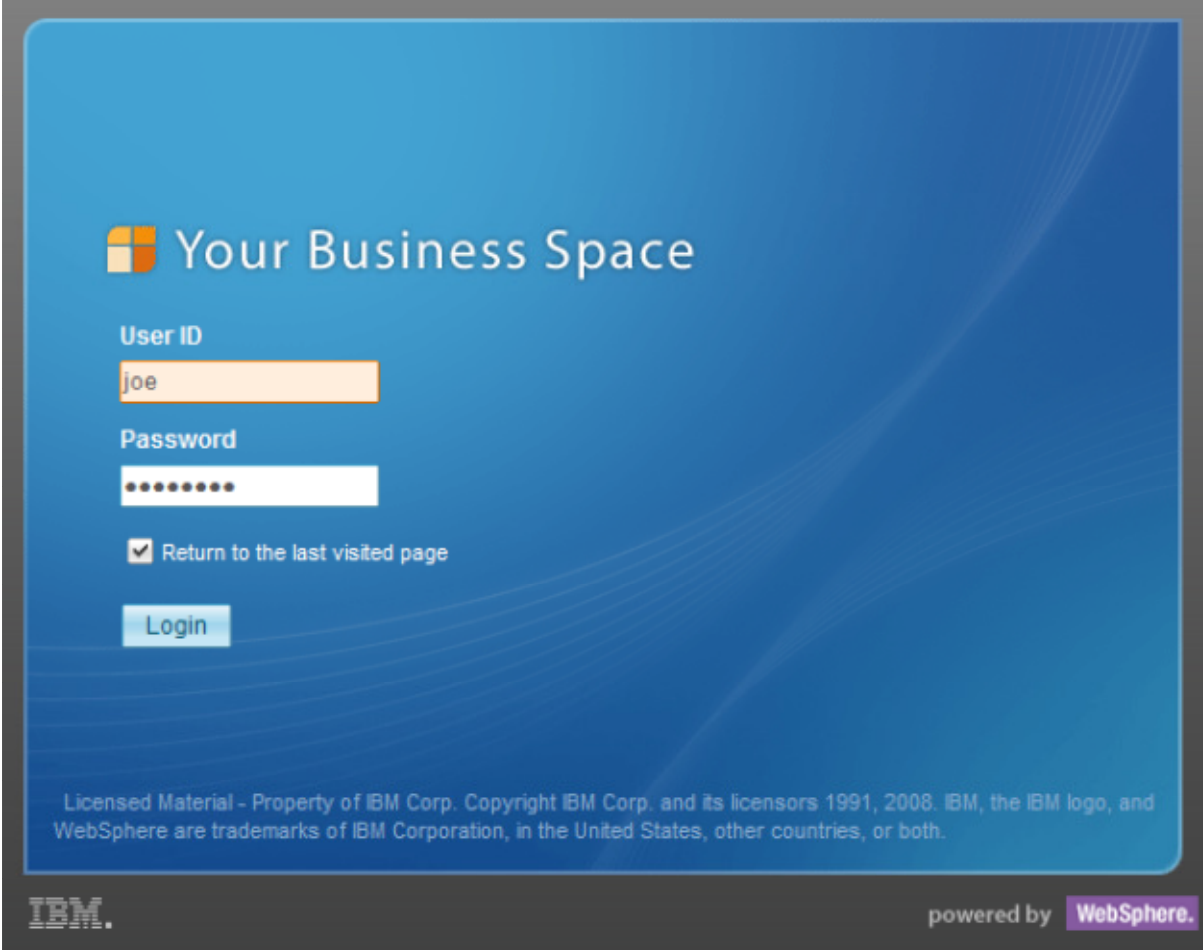
AP Supervisor	▼
Claims Adjustor	
AP Supervisor	
AP Clerk	



User references a single URL to access the solution



Role membership derived from logon



The image shows a screenshot of the IBM Business Space login interface. The background is a blue gradient with abstract white lines. At the top left, there is an IBM logo icon followed by the text "Your Business Space". Below this, there are two input fields: "User ID" containing the text "joe" and "Password" containing seven dots. A checkbox labeled "Return to the last visited page" is checked. Below the inputs is a "Login" button. At the bottom of the page, there is a copyright notice: "Licensed Material - Property of IBM Corp. Copyright IBM Corp. and its licensors 1991, 2008. IBM, the IBM logo, and WebSphere are trademarks of IBM Corporation, in the United States, other countries, or both." The IBM logo is in the bottom left corner, and "powered by WebSphere" is in the bottom right corner.



User taken to Role Home Page

Your Business Space Welcome shaohong | Help | Logout

My Processing Work Manage Business Spaces

My Work Approve Step Page New Page Add Widgets

In-basket

Approve (5) Review Indicate

Filter No filter condition is applied. Page 1

AccountNumber	CompanyName	originator	Postcode	ReceivedDate	Chinese
0	Template	common	100,000	3/2/09 4:16 PM	true
0	sdfsdf	common	100,000	3/8/09 12:53 AM	true
0	Filenet IBM	common	78,697	3/8/09 3:49 PM	true
0	IBM	common	100,000	3/1/09 7:54 PM	true
0	DURAN6666	common	100,000	8/17/06 4:26 AM	true

Toolbar

Actions

Content List

Page 1

AccountNumber	Company Name	Postcode	Name
321	IBM	456	header_preview.gif
222	IBM	111	version.xml

powered by WebSphere

The In-basket Widget can display multiple In-baskets




My Processing Work ▾

My Work ▾ × Approve Step Page New Page

In-basket

Approve (5) Review Index

Filter No filter condition is applied.

AccountNumber	CompanyName
 78697	IBM
 100	IBM
 49697	Filenet



In-basket content can be filtered by the user

In-basket

Approve (5) Review Ind...

Filter

Priority	Address	Contract	Name
	10403 - 172 Street	125,000	
		100	
	310 - 10403 - 172 Street	80,500	

OK



Clicking an In-basket row displays the Step Processor

BusinessSpace Welcome joe | Help | Logout

New Account Supervisor Manage Business Spaces

Accounts | New Account **Review** | Approve | New Page

Header
Index
Subject: Case Management Workflow
Deadline: View instructions

Work Data

Account Number: 938498349

Company Name: Spiffy Limited

Contract Amount: 9,000,000

Home Address: 10 Somers Crescent, London SW1

Home ZipCodes: 100085

Is Rejected

Attachments

Paper [Add](#)

Documents [Add](#)

Paper1

Step Completion

Select a response

Document Viewer

Form fields (handwritten):

- NAME: Rubin, Jess
- DOB: 8-2-02
- SECTION: Information Regarding Applicant
- APPLICANT: Rubin, Jess
- ADDRESS: 124 S. Brent Ave, Blue Art 0015, Las Vegas, NV 89102
- PHONE: 702-681-1234
- EMPLOYER: 1380 Tompkins, Las Vegas, NV 89102
- EMPLOYEE ID: 576-2015
- ADDRESS: 1045 Industrial Ave, Las Vegas, NV
- ADDRESS: 90 Bullard Ave., Delano, CA 91325
- PHONE: 775-453-1234
- APPLICANT'S GROSS MONTHLY INCOME FROM EMPLOYMENT: See Key Check
- APPLICANT'S GROSS MONTHLY INCOME FROM OTHER SOURCES: Court order Written agreement Oral understanding
- SECTION: Information Regarding Spouse or Co-Applicant
- CO-APPLICANT'S GROSS MONTHLY INCOME FROM EMPLOYMENT: See Key Check
- CO-APPLICANT'S GROSS MONTHLY INCOME FROM OTHER SOURCES: Court order Written agreement Oral understanding
- STATUS: POOR QUALITY
- SECTION: Asset and Debt Information
- APPLICANT'S GROSS MONTHLY INCOME: \$
- CO-APPLICANT'S GROSS MONTHLY INCOME: \$
- APPLICANT'S NET MONTHLY INCOME: \$
- CO-APPLICANT'S NET MONTHLY INCOME: \$

Completing a step returns to the Role Home Page

Your Business Space Welcome shaohong | Help | Logout

My Processing Work Manage Business Spaces

My Work Approve Step Page New Page Add Widgets

In-basket

Approve (5) Review Indicate

Filter No filter condition is applied. Page 1

AccountNumber	CompanyName	originator	Postcode	ReceivedDate	Chinese
0	Template	common	100,000	3/2/09 4:16 PM	true
0	sdfsdf	common	100,000	3/8/09 12:53 AM	true
0	Filenet IBM	common	78,697	3/8/09 3:49 PM	true
0	IBM	common	100,000	3/1/09 7:54 PM	true
0	DURAN6666	common	100,000	8/17/06 4:26 AM	true

Toolbar Actions

Content List
Displays a list of documents returned from a Workplace XT stored search. This widget is used to construct P8 Business Process Management applications.

IBM ECM Widgets

- A collection of widgets and sample mashup pages
- Home Page Widgets
 - ECM Toolbar
 - ECM In-basket
- Step Processor Widgets
 - ECM Header
 - ECM Work Data
 - ECM Work Data eForm
 - ECM Attachment
 - ECM Step Completion
 - ECM Viewer
 - ECM Content List
- Helper Widgets
 - ECM Create Work Item
 - ECM Create Action
 - ECM Web Page Displayer

Welcome lauren | Help | Logout

Manage Business Spaces

Add Widgets

In-basket

Preview

Priority	Received Date	Rejected	Acct. Number
Low	Mon July 7 10:00AM	None	100004
Low	Mon July 7 10:00AM	None	100004
Low	Mon July 7 10:00AM	None	100004
Low	Mon July 7 10:00AM	None	100004
Low	Mon July 7 10:00AM	None	100004
Low	Mon July 7 10:00AM	None	100004
Low	Mon July 7 10:00AM	None	100004

Description
Displays the list of in-baskets associated with a role and shows the work items within each in-basket. This widget is used to construct P8 Business Process Management applications.

Owner
International Business Machines Corp.

Viewers

- Web Site
- Presentation
- Spreadsheet
- Document
- Web Feed
- Script Adapter

ECM Widgets

- Toolbar
- In-basket**
- Header
- Work Data

Role Home Page Widgets

The screenshot displays the IBM Business Space interface with the following components:

- Header:** "Your Business Space" with user "shaohong" and "Welcome shaohong | Help | Logout".
- Navigation:** "My Processing Work" and "Manage Business Spaces".
- My Work:** "Approve Step Page" and "New Page" buttons.
- In-basket Widget:** Titled "In-basket", it shows "Approve (5)" items with "Review" and "Ind..." buttons. A filter section states "No filter condition is applied." Below is a table with 5 rows and 6 columns: AccountNumber, CompanyName, originator, Postcode, ReceivedDate, and Chinese.
- Toolbar Widget:** Titled "Toolbar", it contains an "Actions" button with a gear icon.
- Content List Widget:** Titled "Content List", it shows a table with 2 rows and 4 columns: AccountNumber, Company Name, Postcode, and Name.

Yellow callout boxes with arrows point to each widget, labeling them as "ECM In-basket", "ECM Toolbar", and "ECM Content List".

AccountNumber	CompanyName	originator	Postcode	ReceivedDate	Chinese
0	Template	common	100,000	3/2/09 4:16 PM	true
0	sdfsdf	common	100,000	3/8/09 12:53 AM	true
0	Filenet IBM	common	78,697	3/8/09 3:49 PM	true
0	IBM	common	100,000	3/1/09 7:54 PM	true
0	DURAN6666	common	100,000	8/17/06 4:26 AM	true

AccountNumber	Company Name	Postcode	Name
321	IBM	456	header_preview.gif
222	IBM		version.xml

Step Processor Page Widgets

The screenshot shows the 'New Account Supervisor' page in BusinessSpace. The page is divided into several sections:

- Header:** Includes 'Index' with 'Subject: Case Management Workflow' and 'View instructions'.
- Work Data:** Contains fields for 'Account Number' (938498349), 'Company Name' (Spiffy Limited), 'Contract Amount' (9,000,000), and 'Home Address' (10 Somers Crescent, London SW).
- Attachments:** Includes 'Paper' and 'Documents' sections, each with an 'Add' button.
- Step Completion:** Features a 'Save' button, a 'Select a response' dropdown, and 'Complete' and 'Close' buttons.
- Document Viewer:** Displays a scanned document with handwritten entries. A yellow callout box points to the 'ECM Doc Viewer' label at the bottom right of the page.

Four yellow callout boxes with arrows point to the following widgets:

- ECM Header:** Points to the 'Header' section.
- ECM Work Data:** Points to the 'Work Data' section.
- ECM Attachments:** Points to the 'Attachments' section.
- ECM Step Completion:** Points to the 'Step Completion' section.
- ECM Doc Viewer:** Points to the 'Document Viewer' section.

Step Processor Page Widgets

The screenshot displays the BusinessSpace interface for a 'New Account Supervisor' workflow. The 'Work Data' widget contains the following information:

World Corporation
 115 N. Michigan Ave.
 Chicago, IL 12345

ORDER FORM
 A100-001

SalesID	Salesperson	Date	Time
10315	Dave Perman	4/11/2008	14:17

CustID	Company
C100	Acme Corporation

First Name	NameLast
Wiley	Coyote

Address: 12345 Desert Road

Address Two:

City	State	ZIP
Cactusville	NM	98765

Country	Phone	Fax
USA	(313) 555-1212	(313) 555-1213

Shipping Address: Acme Corporation, Wiley Coyote, 12345 Desert Road, Cactusville, NM USA 98765

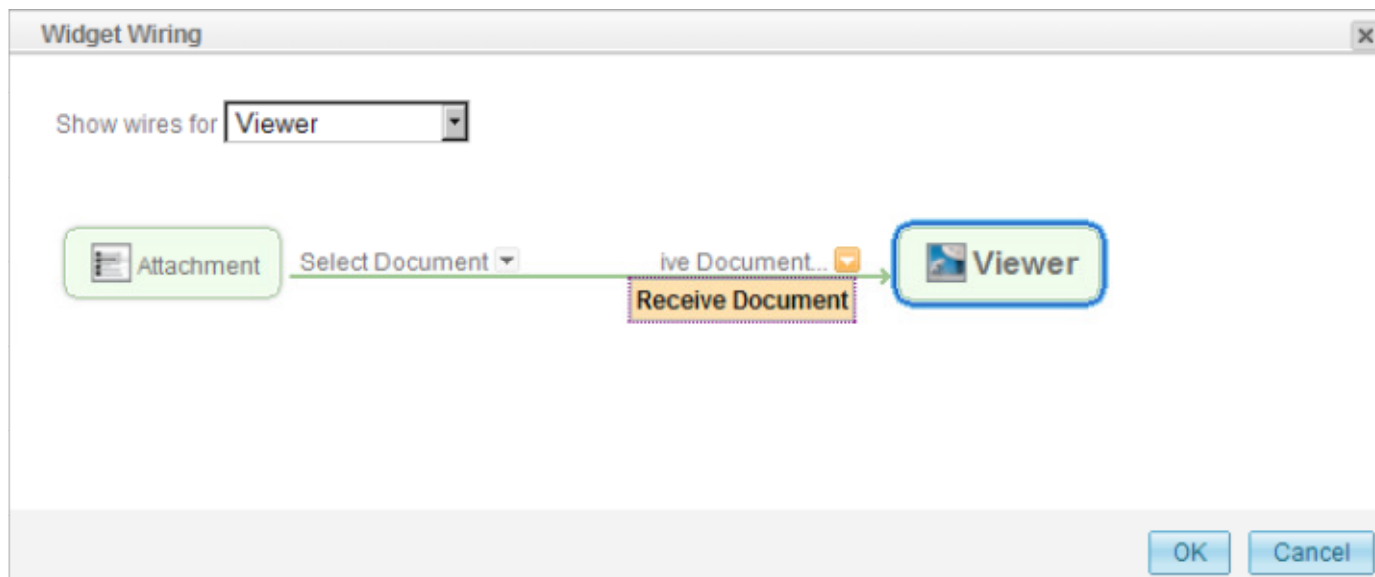
Payment Method:
 Card Number:
 Terms:
 Card Number:
 Terms:

The 'Document Viewer' widget displays a scanned document with handwritten entries. The document includes sections for 'SECTION I: Information Regarding Applicant' and 'SECTION II: Information Regarding Spouse or Co-Applicant'. A prominent stamp reads 'POOR QUALITY'. The document also contains fields for 'TOTAL MONTHLY INCOME' and 'SEC WORLD: Asset and Debt Information'.

Step Completion: Save Select

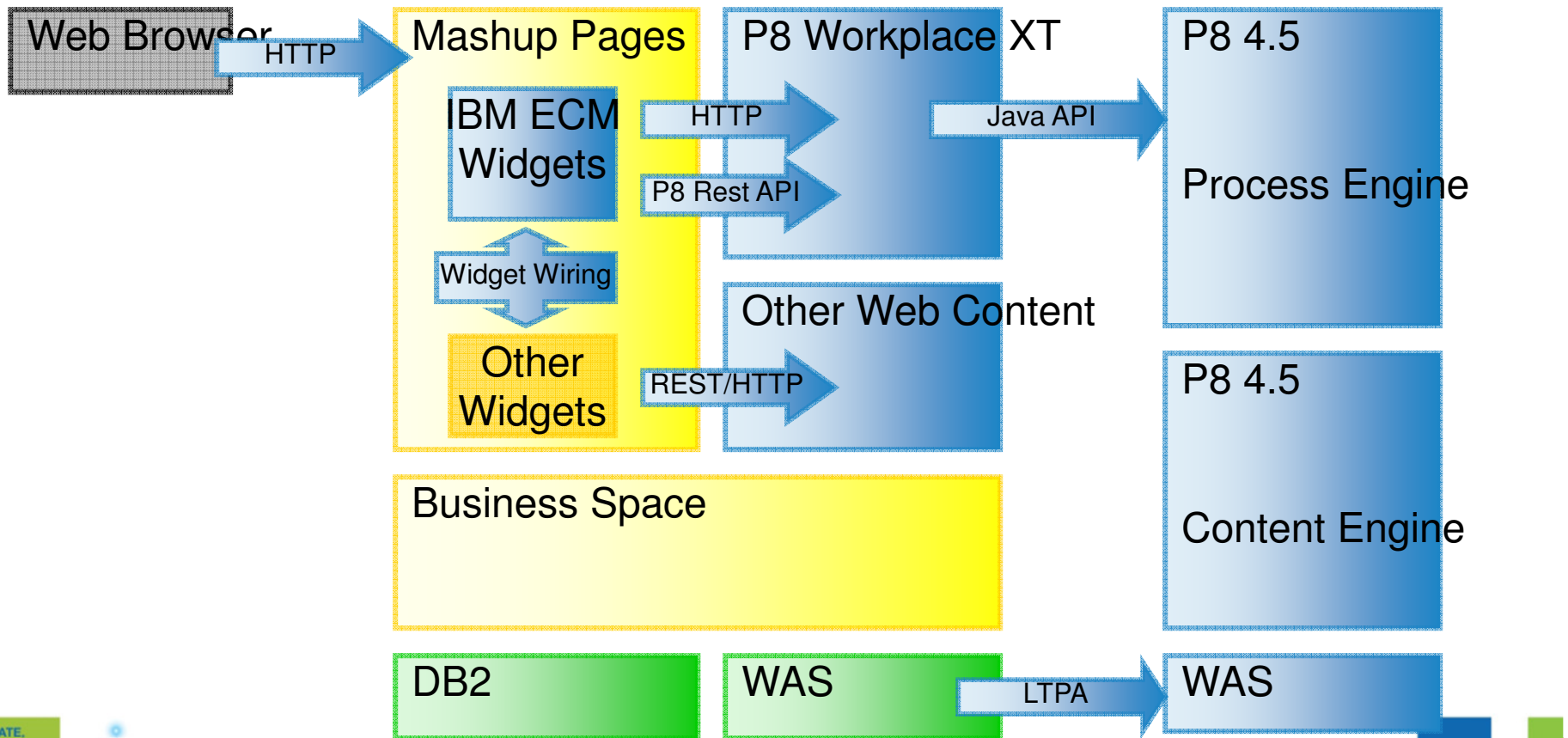
ECM Work Data eForm

Widget Wiring



Simplified ECM Widgets / Business Space Architecture

Client IBM FileNet P8 Application Engine FileNet P8 4.5 Environment



Thank You!

