

# **IBM Content Management Solutions demos**

**By**

**Kevin Van Winkle  
Derick Deleo  
Bob Shoberg**

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**This document contains marketing messages and instructions on demonstrating some of the broad capabilities of IBM's Content Management solutions. These instructions have been created for use with the web version of these demos hosted by the Dallas Demo Center**

**URL to access these demos is:**

**<http://cmdemo1.dfw.ibm.com/index.html>**

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## **1.0 Demo Introduction and Objectives**

### **Primary objectives of the Content Management Solution demos:**

These solution demos are designed to demonstrate the customer business value gained from implementing IBM Content Management solutions, generate interest in these solutions and highlight our competitive advantages. The demos can easily be tailored based on your audience and time constraints.

**Target audience for this demo:** The demos are targeted at LOB management, I/T management, Industry business executives , etc.

For example: Many industries integrate IBM Content Management solutions with their LOB applications to enhance customer care:

- ✍ Cross Industry - improving customer service, accounts payable, electronic commerce, corporate training, and human resource applications
- ✍ Insurance companies - for policy service and claims processing, underwriting, etc.
- ✍ Banking and finance institutions - for credit approval, loan and mortgage processing and credit card management, signature verification, etc.
- ✍ Telecommunications and utilities - for document presentment, electronic billing presentment and payment, customer service. etc.
- ✍ Retail and other businesses - for e-commerce catalogs and other applications
- ✍ Manufacturing - for warranty registration, service documents, engineering documents and change orders, customer services, material safety data sheets, etc.
- ✍ Government - vital records, land records, election and voter registration, complaint management, standards programs, etc.

IBM Content Management is also at the heart of some of the world's most unique and valuable art collections, including the National Palace Museum in Taiwan, the Vatican Library and the State Hermitage Museum in St. Petersburg, Russia.

### **General instructions**

**Demo skill requirements:** You must have a basic understanding of the IBM and Partner products that are part of IBM's Content Management solutions and be able to discuss the function and capabilities of each product. Also desirable is the ability to explain the business value of each product in the Content Management solution.

URL to access demo - <http://cmdemo1.dfw.ibm.com/index.html>

**Demo technical requirements:** You must have either Microsoft Internet Explorer or Netscape Navigator on your machine execute these demos.

This demo does not require any downloads and can be executed on a customers machine.

Please take time to familiarize yourself with the demos contained in this document. Practice the different paths through the demo and the marketing messages associated with each demo before attempting them in front of a prospect.

## **Key Content Management marketing messages:**

IBM Content Management solutions are an extensive portfolio of advanced IBM technologies that integrate powerful imaging, enterprise report management, document management, Internet capabilities and internal business applications. They provide the technologies companies need to access and manage online repositories of unstructured information. With some businesses storing up to 80 percent of their information as unstructured (scanned images, faxes, photographs, computer-generated reports and statements, word-processing documents, spreadsheets, presentations, audio and video clips), it quickly becomes clear how critical managing this unstructured data is for customers.

IBM Content Management provides immediate access to document or image based information on intranets or the Internet, and it ensures those documents are moved on the right process, to the right person, at the right time.

### ***Benefits:***

- ✍ ***Higher quality customer service***; able to instantly access supporting document information
- ✍ ***Significantly increased productivity***; workers focus on the job and not on distributing work or finding documents
- ✍ ***Faster work process cycle times*** - time delays between process steps are eliminated
- ✍ ***Reduced / eliminated floor space***, storage equipment and cabinets, microfiche, microfilm
- ✍ ***Increased revenue***; higher processing speeds can translate into improved response times to business opportunities
- ✍ ***Tight integration with SAP systems and Domino*** applications to trim the size of databases and provide seamless access to supporting business documents
- ✍ ***Better document and workflow control***; resulting in improved professionalism, reduced legal risks, compliance with regulations and best practices

## **E-business and IBM Content Management**

The web is transforming the business models of many companies. IBM Content Management is an important part of enabling a "complete" e-business.

- ✍ Customers want access to review and pay electronic bills on the web
- ✍ Agents of an insurance company want to review all documents related to a claim filed by their policyholder
- ✍ Companies want to store every version of their web based promotional documents which offer products for sale in order to defend against potential law suits over offering terms

- ✍ Customer Service representatives can access all documents for a customer electronically.
- ✍ Back-office workflow processes can be started/kicked off based on web-initiated transactions

**Products contained in this solution demo:** These Content Management demo solutions are *running live* from the Dallas DemoNet on Windows NT and contains the following IBM and Business Partner products:

### **IBM Products**

Content Manager  
 Content Manager OnDemand  
 Enterprise Information Portal  
 Content Manager VideoCharger  
 Websphere Application Server  
 Net.Commerce  
 DB2 UDB  
 IBM HTTP Server

## **2.0 Demo Scenarios**

Potential Content Management customers are looking for a wide range of different applications. Because of this there are multiple demos contained in the Content Management solution set. Each demo will allow you to focus on areas of major customer interest. Following is a list of the demos and the major CM function that each demo covers.

- ✍ Electronic access to scanned documents - Searching and retrieving customer documents whose source was originally paper (Scanned documents) via the Enterprise Information Portal.
- ✍ Rich Media (images, video, audio) for e-commerce - Selling electronic assets via the web using WebSphere, etc.
- ✍ Computer Generated output (COLD) access, using Content Manager OnDemand

## **3.0 Content Manager for Multiplatforms**

This section contains demos that are part of the base CM of multiplatform product

### **3.1 Scanned Images - EIP Thin Client demo**

These CRM solutions are often implemented in Insurance, Finance, etc. Industries and are a key part of any comprehensive Customer Relationship Management system. There are documents for most major industries area available for your use. IBM's EIP is used as the front end tool.

**Demo Steps:**

Launch the EIP Sample Client and logon to userid = **cmbadmin**, password = **password**

You will see the InsuranceDB2 search template. Click on it and click OK  
The search criteria are predefined and will retrieve the appropriate items. Click on search.  
You will get a hit list of the documents described above. WARNING you cannot view a document associated with a DB2 row.

**Scenario: (use InsuranceDB2 search template)**

This demo shows how multiple backends can be simultaneously searched via EIP connectors and then display one result set. The demo utilizes OnDemand Insurance Policies, CM life, auto, health statements, and a DB2 table row.

You may also use the Workflow and Insurance templates, but the InsuranceDB2 has the best federated result set. If you use the Insurance template, the DB2 row will not display; however, all other results will remain the same.

**Out-of-the-box Configuration:**

There are 3 search templates pre-configured Insurance, Insurance DB2, and Loan Workflow. You may use any one of these three templates, but the best one for this demo is InsuranceDB2. The template has federated entities for DB2, CM and OnDemand. It will produce the following result set:

**OnDemand Insurance Policies** (Policy Number predefined as 890-458%)

Policy Number = 890-4589034-78    Customer Name = Joe Smith

**CM Insurance documents** (Last Name predefined to Smith)

SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Police Movie
SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Accident Report
SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Accident Report
SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Auto Photo
SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Traffic accident
SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Parking Ticket
SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Parking Ticket
SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Health Insurance
SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Life Planning...
SSN = 345-67-3214	Last Name = Smith	First Name = Jim	Doc Type = Life Planning...
SSN = 123-45-6789	Last Name = Smith	First Name = Ellna	Doc Type = Life planning...
SSN = 000-23-5678	Last Name = Smith	First Name = Bob	Doc Type = Life Planning...
SSN = 111-22-3333	Last Name = Smith	First Name = Joe	Doc Type = Life Planning...

**DB2**

Employee Number = 01111    DB2 Row will not display anything and will give error message

As you go through the searches, notice that Smith stays in the Last Name field. This is a configuration option of EIP to allow this to happen. The idea here, is that a call center, etc may want to work with a single customer for a period of time.

You can also select the option to keep the search results when a template is changed.

- Viewer's ability to display other types of data
- Launch of apps (MPLAY32 is launched with an audio clip).

### **3.2 Content Manager e-client demo**

This demo represents an example of a "production client" (Vs the EIP Thin Client Sample).

You can select three different server options with the CM e-client demo.

#### **LIBSRVRN**

- ✍ Enter a userid of '**insure**' and password of '**password**'
- ✍ You have multiple options you can choose to demo the e-client. A scenario is provided for 'Insurance'
  - ✍ Select 'Auto Insurance' then click OK
  - ✍ Enter '\*' in any of the boxes and click on 'Search'
  - ✍ Five different items will be returned you can use.
    1. Officer inspection - a video
    2. Damage Statement - Audio message
    3. Accident report - Scanned document
    4. Repair bill - Scanned document
    5. Yellow Mustang - Digital Image

To return to the initial list, click on the 'Index Class List' in the upper left corner of the screen

To retrieve all documents in a index class, enter '\*' in the window.

**Note:** Not all Index Classes have documents available

#### **Cmbddb**

- ✍ Enter a userid of **cmbadmin**, password of **password**
- ✍ You have three search templates available, Insurance, InsuranceDB2, and workflow.
- ✍ This demo executes the same as the thin client sample demo. Instructions for this demo are located in section 3.1

#### **OnDemand**

- ✍ Log on using a userid of **webdemo**, and a password of **password**

- ✍ To access all documents under a category, enter '\*' in any window that has this character on the left side
- ✍ To return to the list of available categories, select 'Folder List' in the upper left side of the window.

### **3.3 Digital Media for e-business demo**

This Content Manager, e-commerce solution provides an integrated e-commerce application to store, search, view, purchase and download digital images. This application is a complete e-commerce application complete with shopping cart., credit card validation, workflow, etc.

Because this demo is so comprehensive, there is a separate document available to guide you through the demo. This document is available on DB2INFo under "Demos and Downloads" with the rest of the Content Management demo documentation

#### **✍ Store**

Images and information about the images are stored in the IBM Content Manager. Typically, each original high resolution image has a number of associated image derivatives such as thumbnail and preview versions, which are used for searching and online-viewing. A process is provided to store these image files and index associated metadata into a relational catalog and text search engine.

Content Manager also contains hierarchical storage management facilities to allow for cost effective use of storage media. For example, thumbnail and view images may reside on hard disk, while the less frequently accessed large print quality images can migrate to inexpensive tape storage.

#### **✍ Search**

Images can be searched using a combination of classifications, keywords, and associated free text in order to find images of interest. For example, if you search on "man running on the beach with dog", the content repository will be searched. Results will be displayed by rank, according to which images best match the search criteria.

The search may consist of either Boolean or free text searches qualified by other key field values. Boolean searches can also include wild cards and search on synonyms. If needed, customers can define their own industry thesaurus to define additional relationships between words for searches.

#### **✍ View**

After a search is executed, the results set is displayed as pages of image thumbnails and minimal metadata ranked by relevancy. The user can then elect to view a larger version of selected images and additional metadata. The user can also link to other searches of similar images by linking by artist name or other keywords.

Viewed images can be protected by applying visible, and invisible watermarks and embedded text overlay in any combination. Selected images can be priced or placed in a user organized set of collections called "light boxes". These light boxes are managed by each individual user (or



project) as convenient. These light boxes can be shared between users of the system or for collaboration on projects

The selected images can also be saved into price estimates in which the customer prices the images based upon usage criteria established before they make the decision to purchase. Once the user decides to buy, he can proceed through a checkout process and purchase via credit card. Payments by credit card are processed using a link to Cybercash. During checkout, the customer can specify whether the high resolution image being purchased should be delivered via FTP download or via CD-ROM. If CD-ROM, the request must be passed to an external fulfillment system for processing.

### **Delivery**

When an image is scheduled for delivery, it is retrieved from the Content Manager repository, an invisible watermark is applied, and the image and licensing agreement is placed at an FTP site . Once the image is available for FTP download, the purchasing customer is notified by e-mail that the image is ready.

### **User Registration**

A facility is provided that allows site users to register themselves and indicate site usage preferences. Once a user is registered, the new user id and password are used for all subsequent visits to the site.

## **4.0 Enterprise Information Portal**

The EIP Thin Client demo uses the same front end as the Scanned Images demo listed under Content Manager for Multiplatforms. EIP is listed on the web page for awareness. To execute this demo use the same instructions as the Scanned Images demo.

## **5.0 Content Manager OnDemand**

### **IBM Content Manager OnDemand:**

- NT, AIX, HP-UX, Sun, OS/400, OS/390 Servers
- Windows 3.1, NT and 95, OS/2 Clients
- Archives and permits on line viewing of computer output; reports and statements
- Handles AFP documents, on or off the Web, with optional approaches for Xerox output

**Note:** OnDemand requires several plug-ins to execute correctly. Based on the level of your browser you may require an update of these plug-ins. Before executing any OnDemand demos, check or install the latest afp or image plug-ins from the initial OnDemand demo page.

### **5.1 Computer Generated output demo**

#### **OnDemand Internet Client demo**

- ✍ From the menu on the left side of the initial demo page select " **OnDemand**", then **Computer Generated output demo**.
- ✍ Select "Log on the a server". Enter the password of " **password**", select ' **submit**'

### Scenario:

There is really no scenario here. All of the same folders are accessible here that are in the thick client demo (see the Out-of-the-Box section of that demo's script). Just logon to the default server as **admin password** and search for desired documents.

### Demo Steps:

- ✍ The "Logon to a server" link will show basic folder searching and the viewing of documents with plugins.
- ✍ The "Try AFP2HTML" link will show basic folder searches and how afp documents are viewed with the transform.
- ✍ The "Try AFP2PDF" link will show basic folder searches and how the afp documents are view with the transform to pdf. NOTE: I setup Netscape and IE so that it launches Adobe. You could have it use the Adobe plugin instead.
- ✍ The "Credit Card Statements" link will allow you to view statements without logging on (you are logged onto the OD server via a call to the ODWEK behind the screens.

The demo shows the capabilities working with computer generated output, and contains multiple different report applications. When you select a category, you do not have to enter additional information as at least one of the relevant fields have been completed for you. Just select 'search' and a series of documents will be returned to you.

#### ✍ **Adobe PDF**

Multiple PDF documents are available. i.e. Cookbook, Magazine cover, Guide to products and services, etc. Suggest viewing contents and size of downloads before using with customer.

#### ✍ **Check Images**

These are digital images of customer checks, tracer slips, and assist documents

#### ✍ **Credit Card Statements**

These are the Baxter Bay Bank Statements i.e.. Big Bucks Bank, more bank for the buck. This is the best application to start the demo as we have included large volumes of these so you can easily demo searching for multiple statements for a customer across several months.

The Baxter Bay Bank Statements can also be used to demo the report mining tools using the Monarch spending analysis model. This application can also be used to show the related documents i.e.. Credit card statement and the check that paid the balance.

If you enter "000-000-001" in the account number field, OnDemand will retrieve all of

the statements for that account number for the past year. This will show how a query for multiple statements for a customer across several months is performed. Potentially you could also search for items over a certain balance ( i.e. Show all items over \$400).

### **Customer Information**

This is a Customer Information folder that contains multiple types of data. It contains a scanned letter, a Microsoft Word document that was printed using the AFPDS driver, a line data transaction report, a PostScript/PDF letter, and an AFP Credit card statement. This application is excellent for showing how our interface can seamlessly view multiple types of data.

### **Insurance Policies**

This application is best for demoing the capability to use color and the ability to contain sub indexes within a document. In this case the table contents is available for easily navigating within the policy.

In this case the table contents are available for easily navigating within the policy. If you enter an "a" in the customer name field you will be able to get four policies to view.

### **Loan Delinquency Reports**

You can use the existing search argument in this demo or enter and specific loan number. This scenario is an example using a single loan number.

If you enter "2010003" in the loan number field, OnDemand client will retrieve the section of the report that contains that loan number, position the viewer to that page and highlight the line that contains that loan number. Any one of the loan numbers in the report will work.

### **Utility Bills**

This application demonstrates on-line access to Oregon Gas and Electric bills.

Note: You may receive an warning message with this application. Coded font 'X1BAR050' not found. We are trying to resolve this problem of a missing font in the data files. Reply OK and demo will continue OK.

### **Scanned Image data**

Demonstrates OD's ability to retrieve and display multiple types of electronic data. This application shows different types of image files (BMP, GIF, JPEG, Tiff, etc.)

### **Student Information**

This application demonstrates our ability to group applications into folders. Folders can be defined such that a user can search across applications even though they have been indexed differently. The student information folder contains Bills, Grades and Transcripts.

## **Telephone Statements**

This application demonstrates telephone bills - residential bills (typically 10-15 page bills). The Monarch report mining feature together with the DI Diver feature can be used to extract/mine the telephone bills and present say the top 10 phone calls, the rate program used and units used.

## **5.2 Online Web Banking Application**

### **Baxter Bay Demo**

#### Scenario:

This demo is intended to show a customer associated with the banking industry how the ODWEK can be customized to suite their needs. The scenario is based around a Baxter Bay Bank customer Mary Smith. She has been audited by the IRS and must prove that some of her travel charges are correct. Mary can show this by logging onto her bank's website and searching for her old statements. She can then view these statements via the ODWEK and can then send the verified information to the IRS auditor.

#### Out-of-the-box Configuration:

All of the html pages are served up via the IBM HTTP Server and have been customized to utilize the appropriate ODWEK cgi calls. The folder for msmith has been configured to have the date search already setup. All that is needed is for you to logon as msmith password, click on search and then view a document.

#### Demo Steps:

Follow the alphabetical steps and launch either IE or Netscape to display the web page.

- ✍ Click on the Statements Online graphic.
  - ✍ Logon as **msmith password** and click Log On
  - ✍ Accept the default search template and click Search
  - ✍ Click on the 04/03/95 Document and view it
  - ✍ Show the line item for World Travel (in Netscape, you will have to use the arrow keys to scroll down)
  - ✍ Now click on the Customer Service link and then click on Contact Us
  - ✍ Type:
    - Name = Mary Smith
    - Account Number = 000-000-000
    - Topic = Question
    - Message = Anything you want that is relevant  
(The sample demo has Mary ask the bank to send a document that shows authenticity)
- Click on Send Message

Nothing will happen with the message, but the customer's application could handle that.

## **6.0 CommonStore**

## 6.1 Electronic e-mail archive demo

### CommonStore for Lotus Domino

This demo will allow you to demonstrate to customers the tremendous power of e-mail and document archival and retrieval with a live CommonStore for Lotus Domino demo (CSLD). Show them how easy CommonStore can be used and the benefits it brings to a customer's Notes environment. Customers using Notes will find this an environment they immediately recognize & will quickly understand the value of CommonStore.

In addition, CSLD's shorter sales cycle can assist in driving future larger sales for Content Manager and Content Manager OnDemand.

**Demonstrate to customers how they can:** Slow down the growth of Notes databases significantly  
Improve Notes System performance  
Store business critical information in a secure archive  
Reduce search and retrieval times  
Increase user satisfaction and productivity.  
Reduce expenses for Domino server hardware

**Demo Description:** Demonstrate the Archival and Retrieval of disk space consuming e-mail attachments  
Show how to retrieve archived attachments without reloading them to the Notes e-mail database.  
Show the value of archiving full Notes Attachments in Notes Native format to save server capacity.  
Demonstrate how easy it is to search and retrieve data from the Archive.

The demo instructions for the CommonStore for Lotus Domino are contained in a separate document - CSLD WebDemo Guide1.zip located at the same location you obtained this document.

## 7.0 Content Manager VideoCharger

Currently this demo is under construction.

## 8.0 DB2 Family

There currently are no demos available showing only DB2. As DB2 is the underlying database technology for Content Manager solutions It is listed here. Currently all links are to product web pages on <http://www.ibm.com>;

## 9.0 Demo Support

If you are having technical problems executing any of the Content Management demos, please call the Dallas Demo Center Help desk at 972-280-3966 (tie line 8-542-3966).