

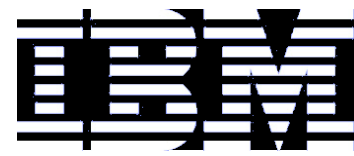
Microsoft® Office

# Deutsche SharePoint® Konferenz 2008

19. – 21. Feb. 2008  
Frankfurt am Main

Connect. Collaborate. Share.



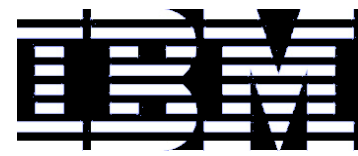


# *IBM ECM im Zusammenspiel mit der Microsoft® Sharepoint*

Thorsten Zoerner

Produkt Marketing - ECM

IBM



# Agenda

- **Anwendungsfälle**
- **Integration / Demo**
  - Compliance
  - BPM
  - Federation
- **Zusammenfassung**

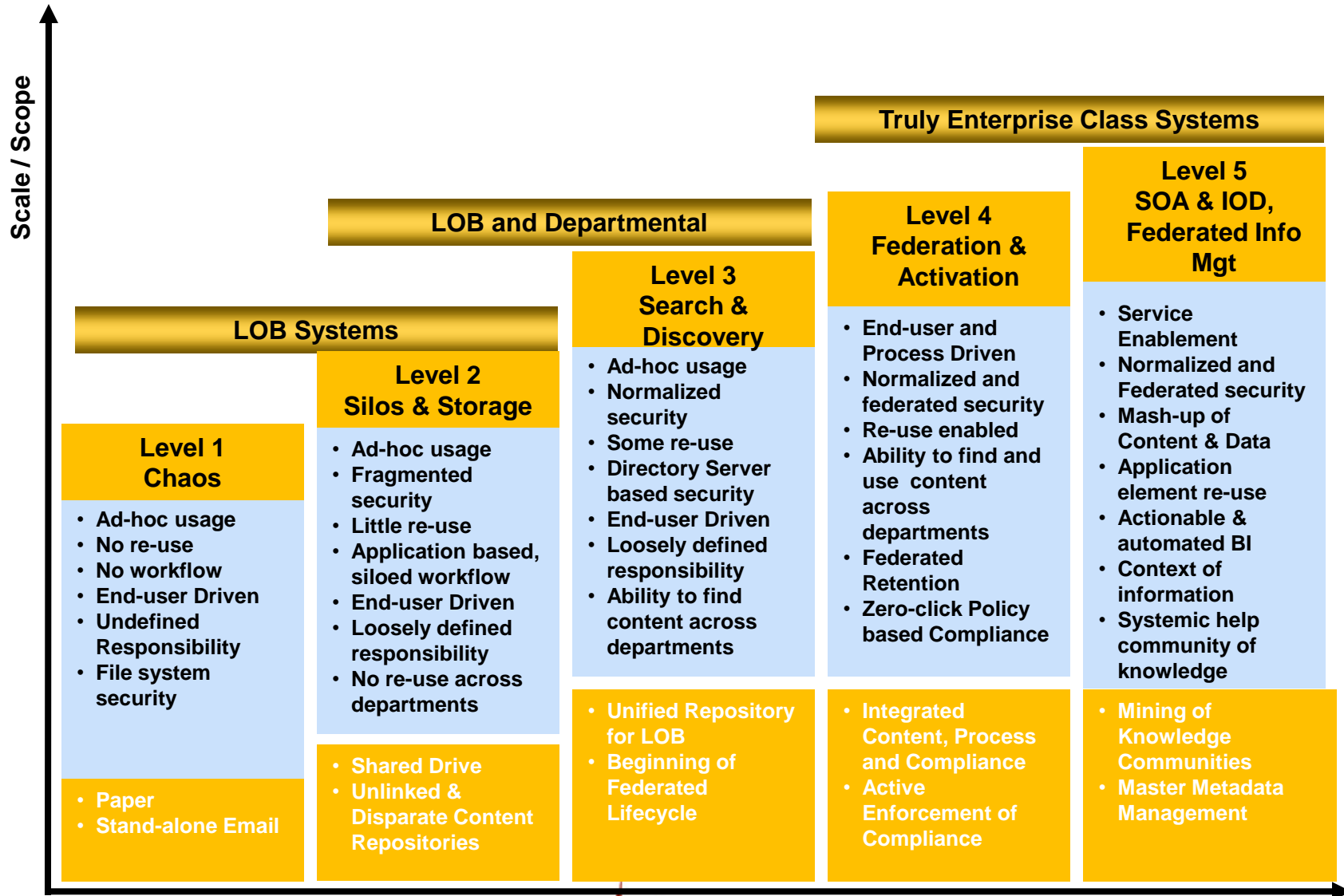


# Anwendungsfälle

- Skalierbarkeit
- Compliance Anforderungen
- Zugriff auf Dokumente von Fremdsystemen
- Bereitstellen von Dokumente für Fremdsysteme
- Federated Search
- Klassifikation
- Systemübergreifende Geschäftsprozesse

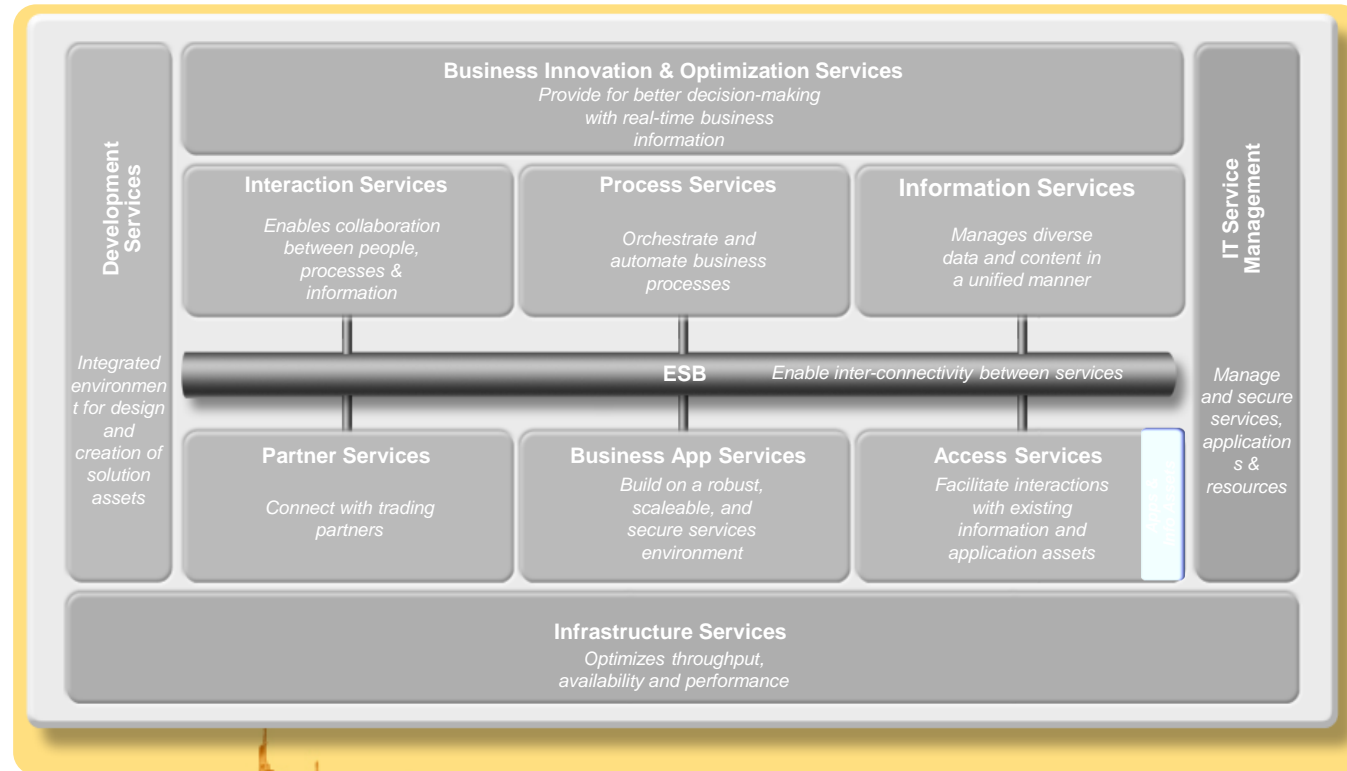


# Information Management



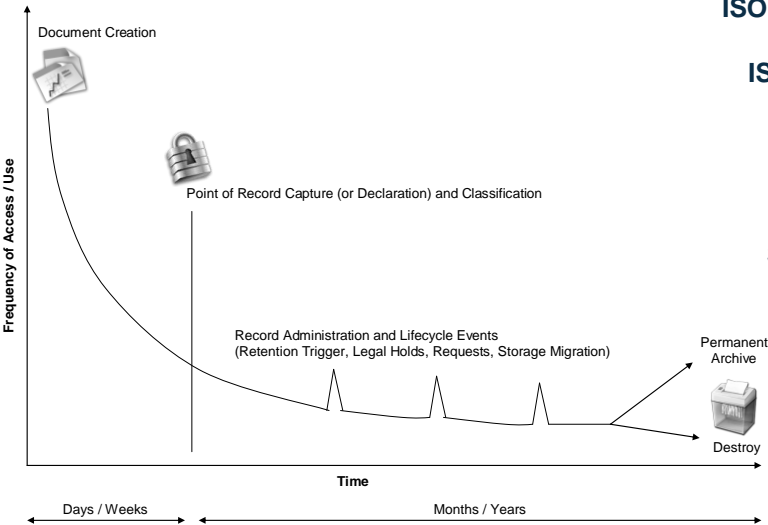
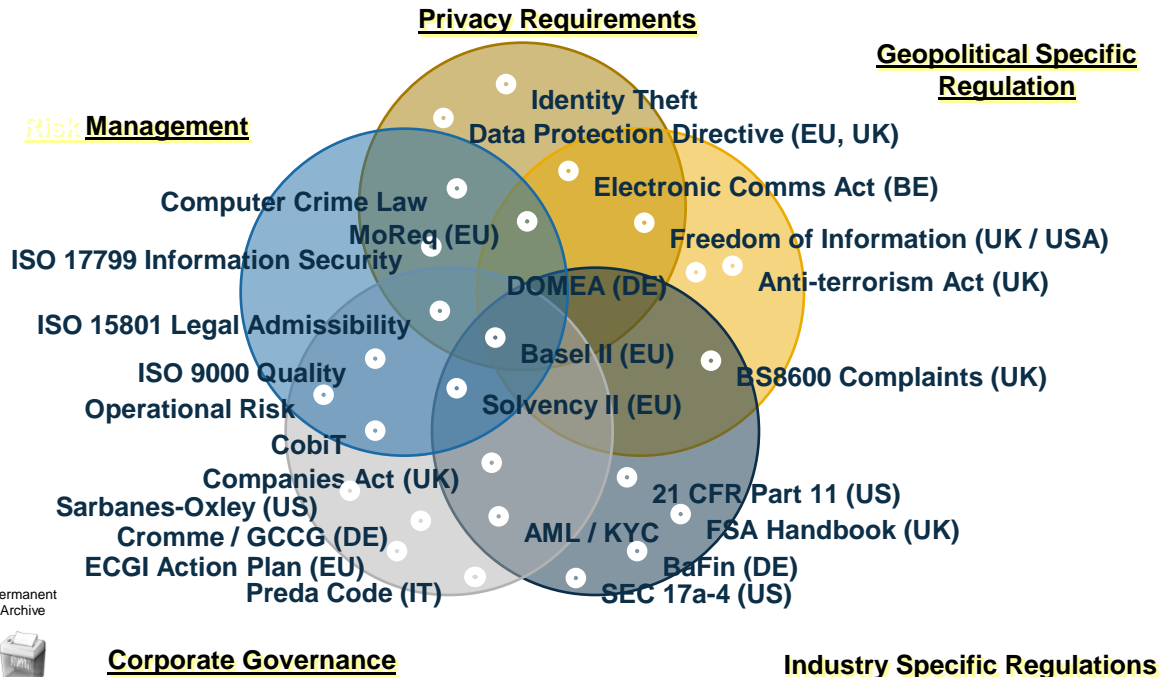
# Skalierbarkeit

- Trennung von Metainformationen und Binärdaten
- Langzeit Archivierung
- Rendition Management
- SOA



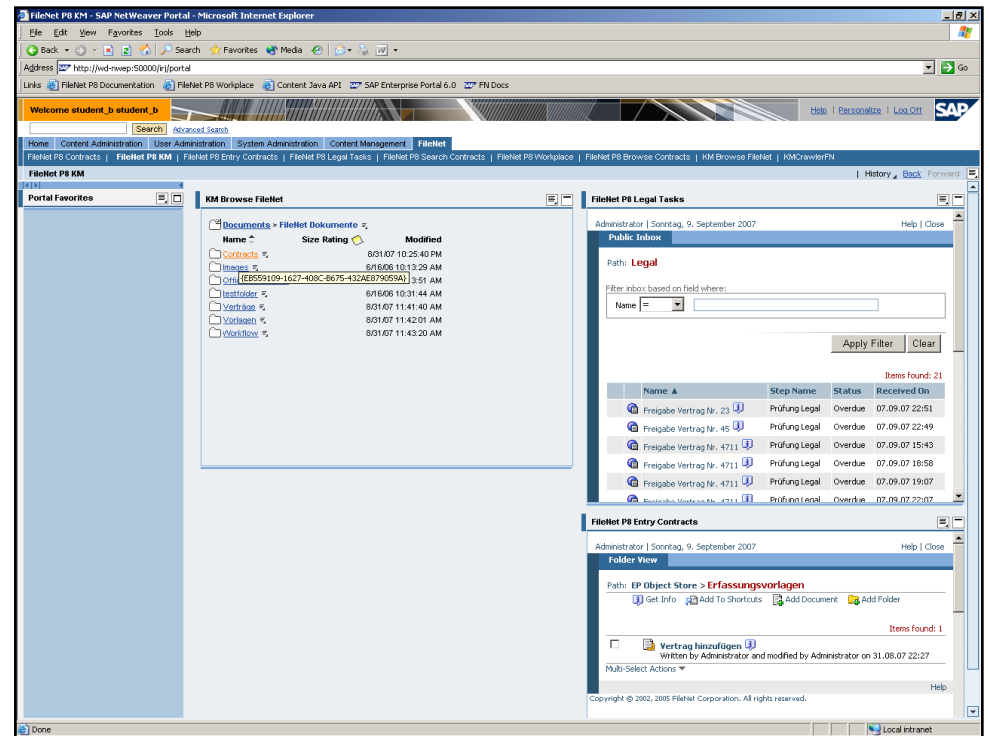
# Compliance Anforderungen

- Records Management
- Verwaltung von Aktenplänen
- Dokument Lebenszyklen
- „Legal Holds“



# Zugriff von/auf Fremdsysteme

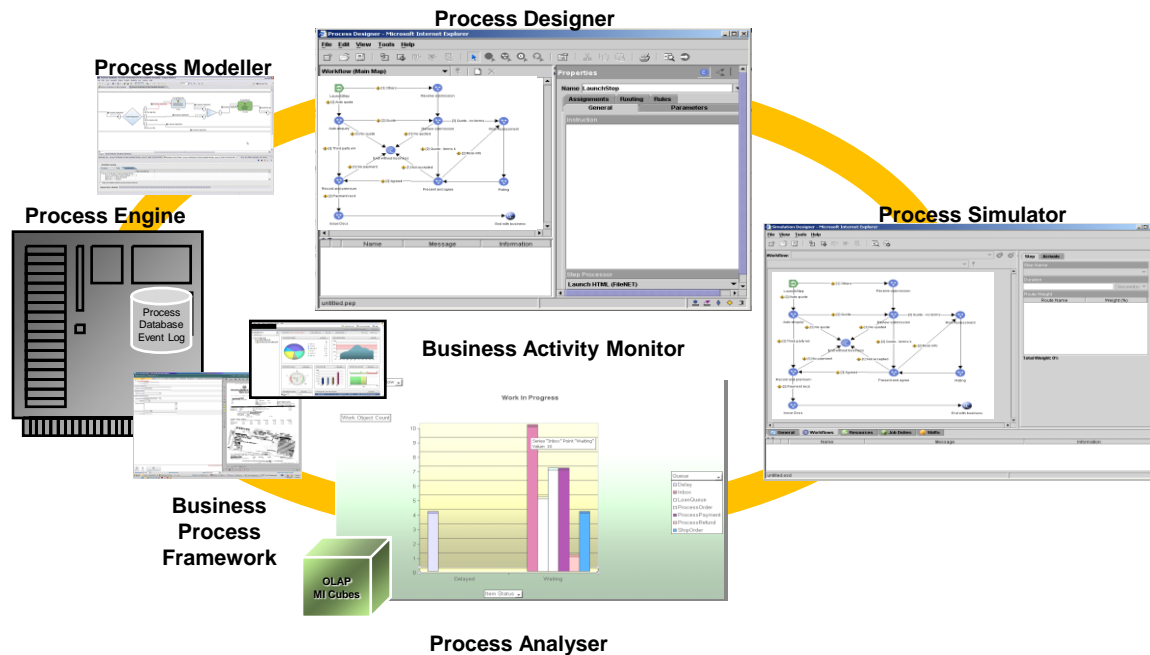
- Zugriff auf Reports (Beispiel: SAP, Siebel...)
- Imaging/Capture
- LOB Anwendungen

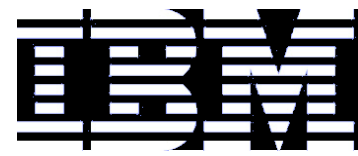




# Systemübergreifende Geschäftsprozesse

- Dokumentenzentrische Prozesse
- Interaktion mit Teilprozessen
- LOB Anwendungen





# Demo



My Workplace - Microsoft Internet Explorer

Homepage - Einkauf - Microsoft Internet Explorer

Address: http://hqdemo1

Willkommen, Otto

## Einkauf

Homepage Einkauf

Alle Websiteinhalte einblenden

**Dokumente**

- Non Food
- Test

**Listen**

- Kalender
- Aufgaben

**Diskussionen**

- Teamdiskussion

**Websites**

**Benutzer und Gruppen**

Papierkorb

Teamwebsite > Einkauf

### Ankündigungen

**Vertragsverhandlungen Weko** 21.12.2007 10:34  
von Otto

Derzeit verhandeln wir einen Alleinvertriebsvertrag für Feuerwerksartikel. Bitte dies bei Verhandlungen mit anderen Lieferanten berücksichtigen.

Neue Ankündigung hinzufügen

### Kalender

Momentan gibt es keine bevorstehenden Ereignisse. Klicken Sie auf "Neues Ereignis hinzufügen" weiter unten, um ein neues Ereignis hinzuzufügen.

Neues Ereignis hinzufügen

### Einkaufsdokumente

Einkauf

Neues Dokument Neuer Ordner


| Typ    | Name     | Größe | Geändert         | Geändert von  |
|--------|----------|-------|------------------|---------------|
| Folder | Non Food | 0KB   | 20.12.2007 11:17 | Administrator |

### Vertragsverwaltung

Vertragsverwaltung

Neues Dokument Neuer Ordner

| Typ      | Name                                     | Größe | Geändert         | Geändert von  |
|----------|--|-------|------------------|---------------|
| Document | allgemeine Vertragssuche                 | 6KB   | 15.01.2008 01:10 | Administrator |
| Document | unterschiedene Verträge                  | 1KB   | 09.01.2008 22:21 | Administrator |
| Document | Vertrag in Prüfung                       | 1KB   | 09.01.2008 11:47 | Administrator |
| Document | Verträge zur Unterschrift beim Lieferant | 1KB   | 09.01.2008 21:27 | Administrator |
| Document | Vertragslaufzeiten                       | 4KB   | 15.01.2008 00:50 | Administrator |



### Archiv Suche

Dokument enthält:

Objektspeicher/Ordner: EVTF/ Durchsuchen...

### IBM FileNet Personal Inbox

| Name                        | Schrittname               | Status          | Erhalten am         |
|-----------------------------|---------------------------|-----------------|---------------------|
| Neuer Vertrag 1001 von Weko | Freigabe Abteilungsleiter | Wird ausgeführt | 08.01.2008 13:34:44 |
| Neuer Vertrag 1004 von Weko | Freigabe Abteilungsleiter | Wird ausgeführt | 09.01.2008 22:54:29 |

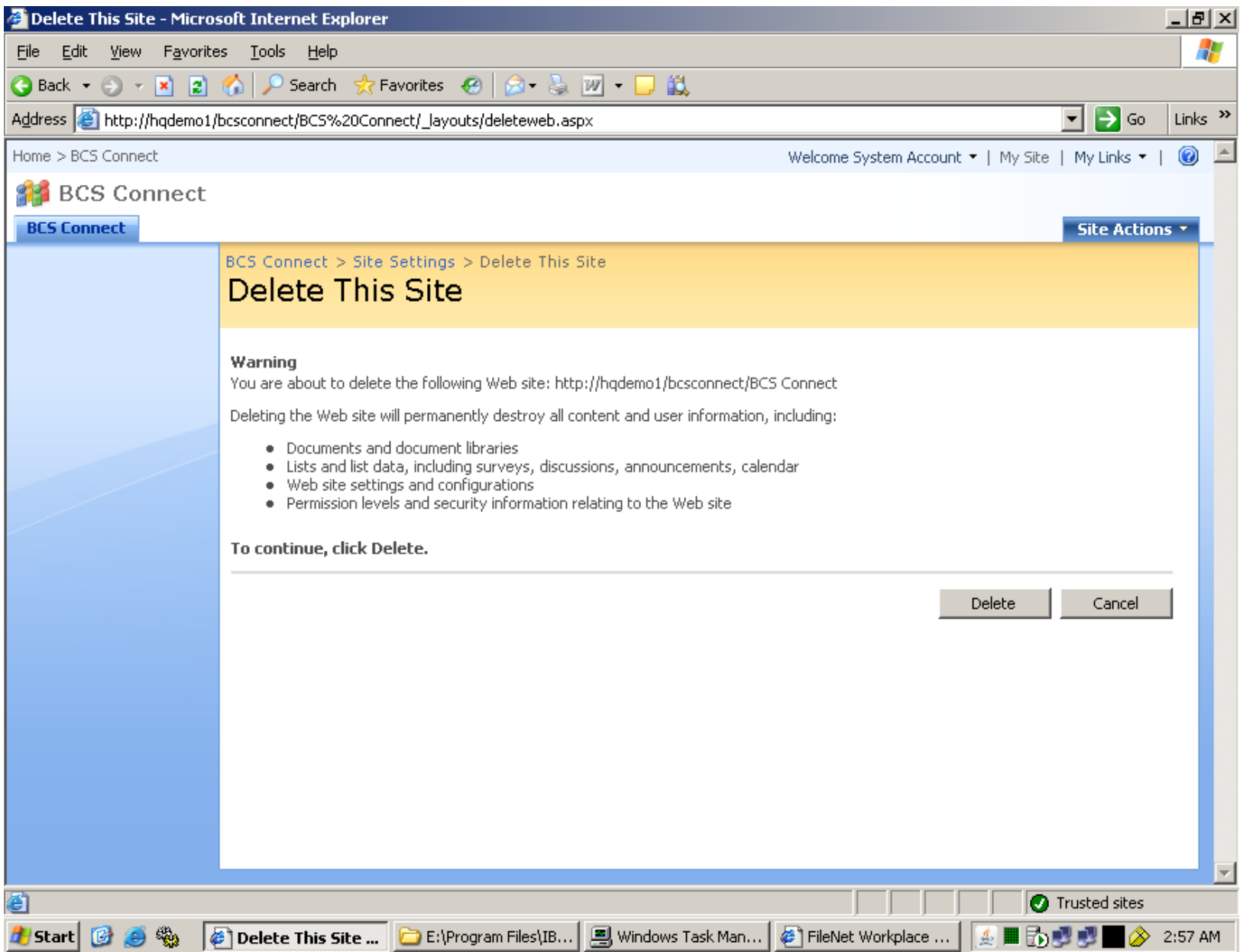
### Hyperlinks

- Workplace XT
- Neuen Hyperlink hinzufügen

http://hqdemo1/Einkauf/Lists/Ankueendigungen/NewForm.aspx

Trusted sites

Start Process Task Manager Homepage - Einkauf - ... My Workplace - Microsof... DE 11:30 AM



Teamwebsite > Einkauf

**Ankündigungen**

**Vertragsverhandlungen Weko** @ 21.12.2007 10:34  
 von Otto  
 Derzeit verhandeln wir einen Alleinvertriebsvertrag für Feuerwerksartikel.  
 Bitte dies bei Verhandlungen mit anderen Lieferanten berücksichtigen.

Microsoft Windows SharePoint Services

FileNet Workplace XT

Logged in as: Administrator  
 Preferences | Help | Log out

**Tasks**

Path: **My Inbox**

Filter inbox based on field where:

Name =

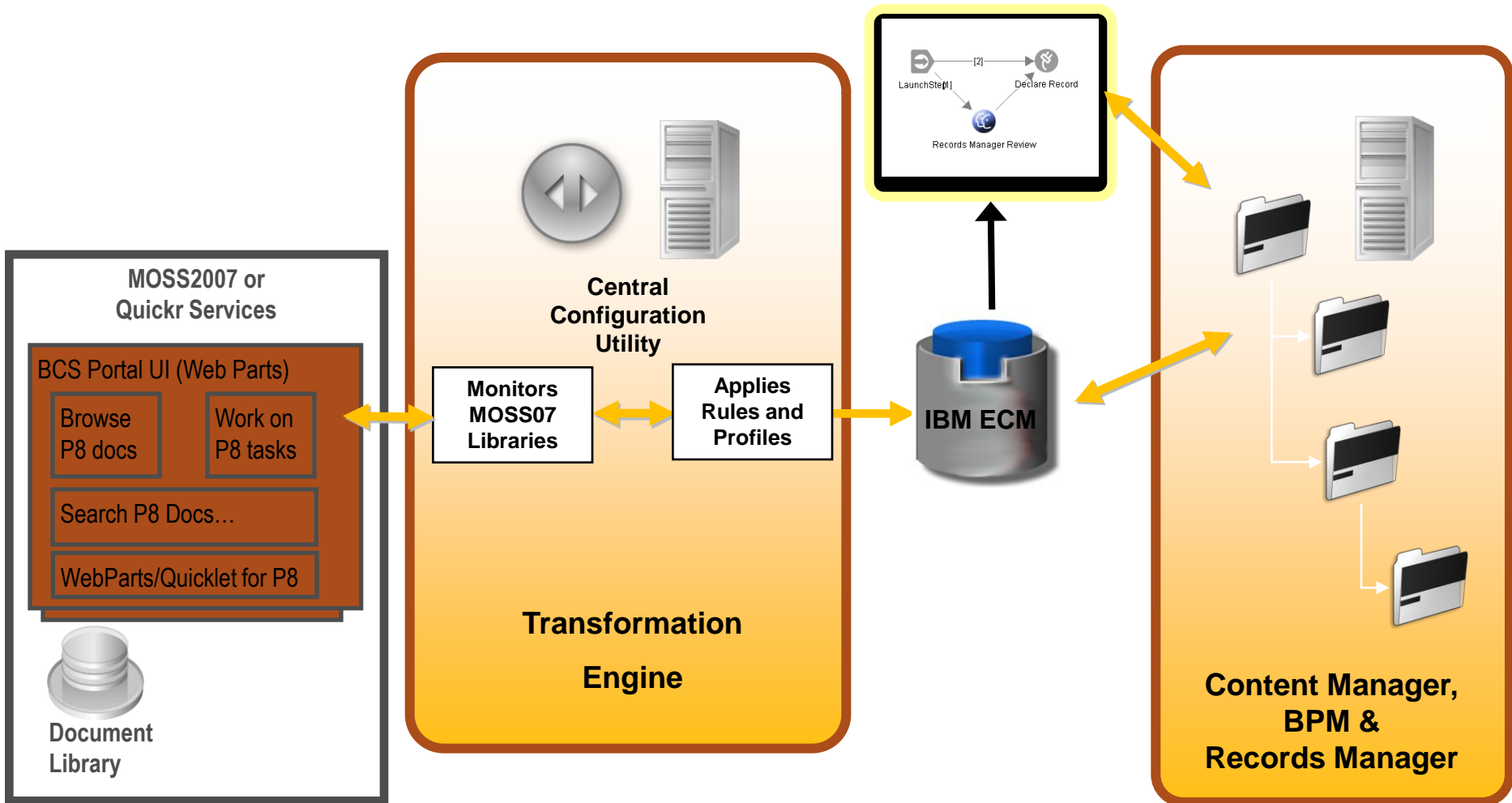
Apply Filter Clear

Items Found: 5 Show Items: 20

|  | Name ▲           | Step Name       | Status      | Received On       |
|--|------------------|-----------------|-------------|-------------------|
|  | Contract Renewal | Notify Customer | In Progress | 12/10/07 3:04 PM  |
|  | Contract Renewal | Notify Customer | In Progress | 12/10/07 3:04 PM  |
|  | Contract Renewal | StartStep       | In Progress | 12/28/07 10:06 AM |
|  | Contract Renewal | StartStep       | In Progress | 12/28/07 10:07 AM |
|  | Contract Renewal | StartStep       | In Progress | 1/21/08 7:10 AM   |

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# IBM ECM - BCS Connectors Operation



# *Zusammenfassung*

# Vorteile IBM ECM SharePoint Connector

- Nutzung der ereignisbasierten Architektur von FileNet P8 mit Active Content
- IBM FileNet Business Process Manager für den Ablauf, die Analyse und die ständige Verbesserung von Geschäftsprozessen
- Benutzer bleiben im Bereich MS Office und MS SharePoint in Ihrer gewohnten Umgebung
- Einfache Integration in bestehende Umgebungen
  - Portale, Applikationen, Prozesse
  - Andere Repositories für Dokumente
- Archivierungs- und Compliance-Anforderungen

# BCS and ECM

## Applications

External Sourcing / Capturing

Individual/Team Inbox

Basic Check In/Check Out/Versioning

Record Declaration/Records Management

Content centric BPM

Collaboration

Portal Management (Intranet/Extranet)

Flexible User / Policy Management

Meta Data Management

LOB Application Development

Long Term Archiving

Desktop Integration

Single Sign On Web Applications

|                                       | BCS | BCSandECM | ECM |
|---------------------------------------|-----|-----------|-----|
| External Sourcing / Capturing         | -   | +         | +   |
| Individual/Team Inbox                 | -   | +         | +   |
| Basic Check In/Check Out/Versioning   | +   | +         | +   |
| Record Declaration/Records Management | -   | +         | +   |
| Content centric BPM                   | 0   | +         | +   |
| Collaboration                         | +   | +         | -   |
| Portal Management (Intranet/Extranet) | +   | +         | -   |
| Flexible User / Policy Management     | +   | +         | +   |
| Meta Data Management                  | 0   | +         | +   |
| LOB Application Development           | +   | +         | +   |
| Long Term Archiving                   | -   | +         | +   |
| Desktop Integration                   | +   | +         | 0   |
| Single Sign On Web Applications       | +   | +         | 0   |



- EMEA ECM Conference

- The Hague
- June 2-6, 2008

*“It was very interesting to understand how the worldwide customers are working and thanks to the ECM Conference I will have the opportunity to share all new concepts and ideas with my colleagues.”*

*Delegate feedback ECM Conference 2007*





Besuchen Sie uns....

Stand 2.10 Halle 5

Thorsten Zoerner – [thorsten.zoerner@de.ibm.com](mailto:thorsten.zoerner@de.ibm.com)

**Vielen Dank!**

# *Backup*

# ECM creates Context: A Practical Example ....

Phone Number

My Workplace - Windows Internet Explorer  
 http://hqdemo1:9080/Workplace/HomePage.jsp?mode=reset

focus CORPORATION  
 Steve Miller | Friday, June 15, 2007

My Workplace

Applicant Name  
 Doug Coombs

Account Type  
 Single Account

Initiation Contribution  
 11,250.00

Response  
 Approve

Comment

View Attachments

GantCarly122115

Passport for Gant

W-8BEN for Gant

Search for synonyms:

- Automatically search for synonyms
- Automatically search for synonyms by using semantic expansion
- Do not search for synonyms

New Account Number 122115

Home | Preferences | Sign Out

## WebPerson

...Not Available. Phone. 44-1895 207 313. Tieline. FAX. .... (10 Jul 2007)  
<http://w3-03.ibm.com/marketing/commdir.nsf/452fe05a468a6ed3852565c100...>



Coombs, Doug  
 Product Marketing for ECM / BPM across NE / SW  
 IoT

## [ppt] Get Organization Charts with summary roles and team charts (Microsoft)

...Hassen Baghai Director Infrastructure Compliance Services L. Talbot Assistant Robert Coombs  
 Pre IT Due Diligence Post ...Hughes J. Peden L. Wood Robert Coombs Manager Acquisition IT  
 Manager Europe Infrastructure Services John Jackson Manager ...Duffy Manager DSW Control  
 Manager DSW e-business Dev. Planning Arch Sue Joe Manager DSW e-business Proj Office ...  
 e-business Dev Planning Arch Sue Joe Manager DSW e-business Project Office Cordula Rafal  
 Williamson M. Yang D. Yuen C. Lian L. Phua C. Yeo Doug Campbell Manager DSW e-business  
[http://w3-03.ibm.com/software/sales/saletool.nsf/resources/bt\\_download...](http://w3-03.ibm.com/software/sales/saletool.nsf/resources/bt_download...)

[ More results from <http://w3-03.ibm.com/software/...> ]

## Software | Business transformation | Business transformation | ...

...an Advisory Business Analyst following a long-standing contract with the OnTARGET Team.  
 joined my department as an IConS developer. ...Effective January 1 Richard Bissonnette has  
 development project manager on the Price Quote ...Manager Doug Campbell says Sundar is  
 the Registration and Authorization team. ...Effective April 1 April Bliss started a new position  
 by Bob Coombs. .... (04 Sep 2007)

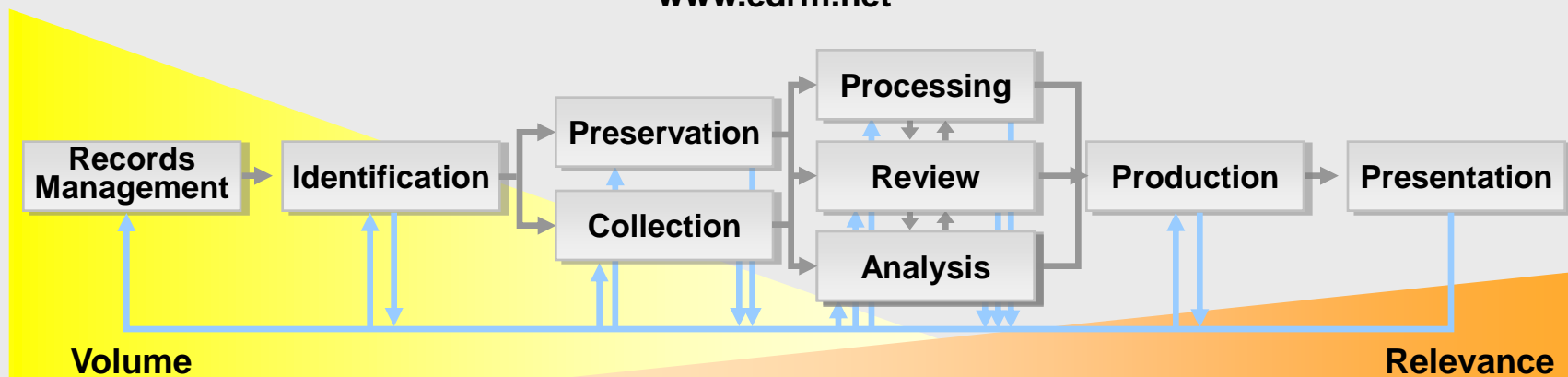
<http://w3-03.ibm.com/software/sales/saletool.nsf/salestools/transform...>  
 [ More results from <http://w3-03.ibm.com/software/...> ]

# What is Electronic Discovery?

**Electronic Discovery is more than just searching ... it is a legal business process that defines what documents are needed, how they are collected, handled, reviewed and eventually packaged to be presented to other parties. The improper handling of information (emails, documents, data, paper conversion, etc) during this process can prevent it from being admissible as evidence in court (spoliation).**

## Electronic Discovery Reference Model

[www.edrm.net](http://www.edrm.net)



Source: Socha Consulting and Gelbmann & Associates. Copyright 2005-2006 All rights reserved. Used with permission.

# IBM Compliance Warehouse for Legal Control

## Information

### Enterprise Content

- Paper Capture
- Email, Documents, BCS Systems

### Operational Processes

- Workflow & Transactions
- Embedded Controls & Risk Monitoring

## Warehousing and Storage

### Digital Compliance Warehouse

#### Warehouse Services

- Records / Retention
- Automatic Classification
- Content & Process Analytic Framework
- Process Execution / Audit / Monitoring
- Provenance (Chain of Custody)
- Role Based Secure Access
- Meta Data Catalog Management
- Active Content / Lifecycle Events

#### Policy Management Storage Management



Compliance  
Vault

Lifecycle  
Management



Virtual  
Warehouse Vaults

Integrated IBM  
Hardware/Storage  
(Optional)

## Access Models

### Legal Control

- Legal Hold & Discovery
- Records Management
- Case Management

### Operational Control

- Risk & Control Framework
- Process Management
- Process Monitoring
- Taxonomy Management
- Search
- Compliance SOA

### Analysis & Reporting

- Mining & Visualization
- Business Intelligence
- Process Simulation

IBM Business & Technology Services

- Multiple Assessments & Services

Partner Solutions | Partner Services

- No Paper Weight

# IBM Compliance Warehouse Ecosystem

## Information

### Enterprise Content & Paper Control

- FileNet Email Manager
- FileNet Records Crawler
- FileNet SharePoint Connector
- CommonStore Email Archive
- FileNet Capture & Capture ADR

### Content Centric Process Automation

- FileNet Business Process Manager
- FileNet Forms Manager

## Warehousing and Storage

### Core Warehouse Software

- FileNet Records Manager
- ECM Repository with Process Engine
- Classification Module

### Optional Warehouse Software

- FileNet Systems Monitor
- FileNet Content Federation Svcs
- Information Integrator Content Edition
- FileNet Image Manager Active Edition
- Tivoli Access Manager
- Tivoli Identity Manager

### Supported Repositories

- Content Manager v8
- Content Manager OnDemand
- FileNet Image Svcs / Content Svcs / P8
- Non-IBM

### Optional Warehouse Storage

- Tivoli Storage Manager / SSAM
- System Storage DS8000 / 4000
- N series unified Storage
- System Storage DR550
- Other IBM Storage

## Access Models

### Legal Control Tools

- CommonStore eMS Discovery
- Legal Hold & Discovery
- Records Management

### Operational Control Tools

- OmniFind Enterprise Edition
- Cognos Now!
- Lotus WBCR
- Tivoli Compliance Insight Mgr

### Analytical & Reporting Tools

- Content Analyzer
- Cognos 8 + Cognos Go!
- FileNet Process Analyzer
- FileNet Process Simulator

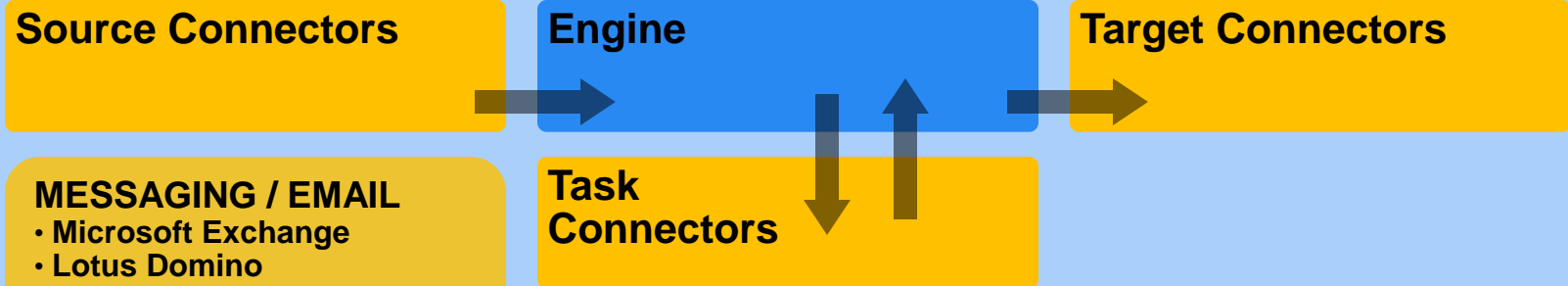
IBM Business & Technology Services  
• Multiple Assessments & Services

Partner Solutions | Partner Services  
• No Paper Weight

# "Symphony": Unified Archival Architecture

## Content and Information Flow

Archive \* Monitor \* Enforce



### MESSAGING / EMAIL

- Microsoft Exchange
- Lotus Domino
- Novell GroupWise
- Instant Messaging
- PST and NSF

### FILE SYSTEMS

- Microsoft File System
- Desktops and Other

### OTHER

- Microsoft SharePoint
- Lotus Quickr
- IBM ECM Repositories
- Non-IBM ECM (IICE)
- Backup Tapes and Other
- Custom

***Content Source Agnostic***

***Content Type Agnostic***

***Modular Connectors***

- Available Now
- **Future**



