



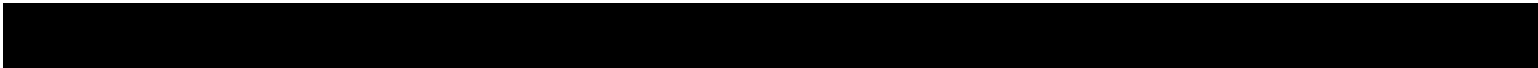
# Austin

ECM Regional UserNet

**Austin IBM ECM Regional UserNet**

**May 13-14, 2010**

**Hyatt Regency Austin  
Austin, Texas**



## Document Driven Business Process Automation

Be sure to attend the Kofax Session:

**Kofax Enterprise Capture: seamlessly extending your IBM ECM investment  
...Get the most OUT of your investment by getting the most IN**

Presenter:

**Mark Golden, Global Account Manager, Kofax**

- Production and Ad-Hoc Capture
- Scan to Archive, Scan to Process and Process Automation
- Desktop, Workgroup and Enterprise Capture
- Back Office, Front Office and Distributed Capture
- Capture Documents of Any Type at Any Location Worldwide
- Structured, Semi-Structured and Unstructured Content

*Kofax  
Platinum Sponsor  
of IBM ECM  
UserNet Series*



[www.kofax.com](http://www.kofax.com)

**KOFAX** 

*Please stop by the Kofax breakout session for your chance to win a \$50 Apple gift card*

© 2010 Kofax, Inc. ("Kofax"). All Rights Reserved.

My fellow IBM Enterprise Content Management colleagues,

Welcome to the annual 2010 Austin UserNet conference here in Austin, Texas. We are confident that this year's conference will once again be an exciting and worthwhile event by providing you with quality information on products and solutions as well as the opportunity to network with fellow peers.

The board feels strongly that this is your conference and we have constructed this event around your feedback, requests and suggestions. Each year we try to introduce some new ideas while keeping some of the tried and true ones that have worked well in the past. But we can only continue to improve when we hear from you, so please take the time to fill out the event survey and know that you are always welcome to stop one of the board members or any of your IBM ECM representatives with suggestions.

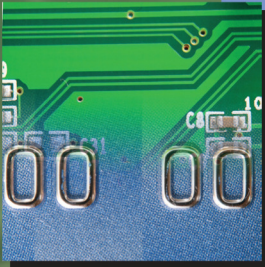
At various times during the conference, our exhibit hall will be open for you to visit and discuss your needs with the partners and product experts. They are here to provide you with solutions, so please take the time to stop by for a visit and take advantage of the resources provided for you. Without these sponsors, we would be unable to offer this event free of charge.

In addition to the exhibits, we've lined up many interesting breakout sessions including several customer presentations and back by popular demand, two hands-on labs! Please take advantage of as many of these breakouts as possible.

Thank you for attending the 2010 Annual Austin UserNet Conference.

Your User Group Board

Lene Hein, Board President



**PROUD GOLD SPONSOR FOR THE IBM REGIONAL  
USERNET SERIES**

## We put the "E" in ECM

- Do you want to increase end user adoption of ECM?
- Is the lead time and cost to deploy new applications an issue?
- Have you investigated the advantages of hosted ECM solutions?
- Are the cost savings and risk reduction associated with bundled hardware, software, and implementation important?
- Would a free P8 installation help you migrate from Panagon?

Jeskell is the North American distributor for WeWebU OpenWorkdesk and ZIOI. Visit our booth and see how we put the "E" in ECM.

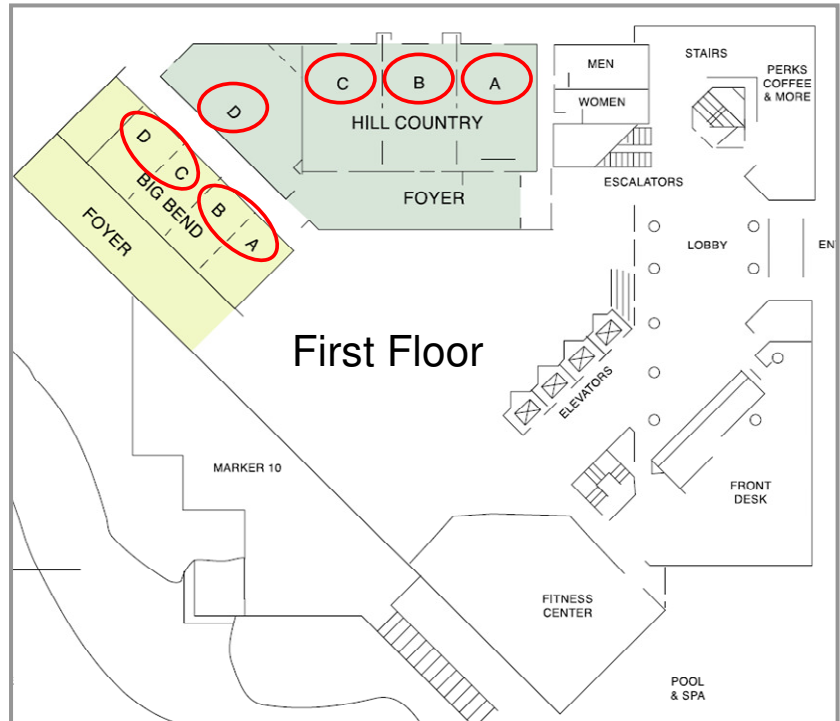


For more information email [ecm@jeskell.com](mailto:ecm@jeskell.com)

## Breakout Locations

Breakouts take place in the following meeting rooms within the hotel:

- Hill A
- Hill B
- Hill C
- Hill D
- Big Bend A&B
- Big Bend C&D



### *Been There. Done That.*

**E**xperts in IBM FileNet BPM, RGB Projects has decades of experience analyzing business processes and developing workflow applications. Our BPM solutions deliver shorter cycle times, higher throughput with less manpower, and increased management visibility. We reengineer and automate your business process to eliminate errors and omissions. Our agile solutions allow you to respond rapidly to changing business conditions, and to quickly implement process refinements.

**W**e've automated business processes in a wide variety of industries, from banking to manufacturing, government to e-commerce. No matter your business challenge, chances are we've seen it before.

**Stop by our booth** and talk to one of our representatives about creative solutions to your business problems. While you're there, check out our solutions for pension administration, medical records management, and online order management.

[www.RGBprojects.com](http://www.RGBprojects.com) • Tel 310.491.0637 • Fax 310.491.0641

## Thursday, May 13<sup>th</sup>

1:15 p.m. – 3:15 p.m.	<b>General Session KeyNote Address</b> Carl Kessler, Vice President, ECM Development (Texas Ballroom)					
<b>Breakout Rooms</b>	<b>Hill Country A</b>	<b>Hill Country B</b>	<b>Hill Country C</b>	<b>Hill Country D</b>	<b>Big Bend A&amp;B</b>	<b>Big Bend C&amp;D</b>
3:15 p.m. – 3:30 p.m.	<b>Break</b> <b>Sponsored by Jeskell</b>					
3:30 p.m. – 4:20 p.m.	Advanced Security Using Marking Sets	Upgrading P8 3.5.x to 4.5.x Lessons Learned by Panhandle Eastern Pipeline Company (customer presentation)	IBM FileNet P8 101 (Introduction to IBM ECM P8 for FileNet Customers)	Content Decommissioning with InfoSphere Content Assessment	IBM Content Manager OnDemand: your 'View Not Print' solution for ECM	Developing Agile ECM Widgets for FileNet P8
4:20 p.m. – 4:30 p.m.	<b>Break</b> <b>Sponsored by RGB Projects, Inc.</b>					
4:30 p.m. – 5:20 p.m.	DIY Migrations: P8 3.5/4.0 to P8 4.5	Apache User Experience: Do's and Don't of implementing FileNet P8 for RIM Compliance (customer presentation)	Ready, Set, Go! Create Actionable Business Insights with Trusted Content Analytics	IBM FileNet Content Manager - the core content management solution for FileNet P8	Hands-on Lab: InfoSphere Classification Module (ICM)	Hands-on Lab: Get Your Hands on IBM FileNet BPM and the new ECM Widgets
5:20 p.m. – 7:30 p.m.	<b>Reception</b> (Texas Ballroom) <b>Sponsored by Kofax</b>					

## Friday, May 14<sup>th</sup>

7:45 a.m. – 9:00 a.m.	<b>Breakfast</b> (Texas Ballroom) <b>Sponsored by Adjacent Technologies, Inc.</b>					
9:00 a.m. – 10:00 a.m.	<b>General Session: Building the Business Case for Content Management</b> Rich Madina, Principal Consultant at Doculabs (Texas Ballroom)					
10:15 a.m. – 11:05 a.m.	Upgrading and Migrating to IBM FileNet P8	IBM FileNet System Monitor (FSM) in P8 and CMOD Environments	Case Management is not just for cases - and what does it have to do with BPM?	IBM eDiscovery - Best Practices to Cut Costs and Deliver Early Case Insight	Hands-on Lab: InfoSphere Classification Module (ICM)	Hands-on Lab: Get Your Hands on IBM FileNet BPM and the new ECM Widgets
11:05 a.m. – 11:15 a.m.	<b>Break</b> <b>Sponsored by Content Silo</b>					
11:15 a.m. – 12:05 p.m.	Kofax Enterprise Capture: seamlessly extending your IBM ECM investment	Content Classification: Critical to Assessment, Collection & Archiving	Optimize Business Insights with Cognos Content Analytics	Business Process Manager (BPM)	Content Federation and Integration - Unlocking the Value of Distributed Content	Transforming your FileNet P8 System for Information Management & Object Store Best Practices
12:05 p.m. – 1:05 p.m.	<b>Lunch</b> (Texas Ballroom) <b>Sponsored by Enterprise Content Management Group (ECMG)</b>					
1:05 p.m. – 1:55 p.m.	IBM InfoSphere Content Collector: More than email, more than archiving, more than an isolated solution	Social, Collaborative and Web Content meet ECM	Lessons from the Field: FileNet P8 3.x to 4.x Upgrade/Transition	Information Lifecycle Governance and Trusted Content	IBM Content Manager	Maximizing Collaborative Content with Search
1:55 p.m. – 2:05 p.m.	<b>Break</b> <b>Sponsored by Softech &amp; Associates</b>					
2:05 p.m. – 2:55 p.m.	IBM Smart Archive - Take A Smarter Approach to Archiving with IBM	Best Practices in Content Manager OnDemand Conversions	Driving Down Costs Using Capture ADR	Extend the Value of BPM for Performance and Decision Management	P8 3.5.x to 4.x Application Migration Guidelines and Best Practices	Records Management - Leveraging IBM's Tools and Best Practices
2:55 p.m. – 3:15 p.m.	<b>Closing Session</b> (Texas Ballroom)					

EXPERTS IN ENTERPRISE CONTENT MANAGEMENT - ALLIES IN DELIVERY

EXPERTS IN ECM - ALLIES IN DELIVERY

EXPERTS IN ECM - ALLIES IN DELIVERY

EXPERTS IN ECM - ALLIES IN DELIVERY

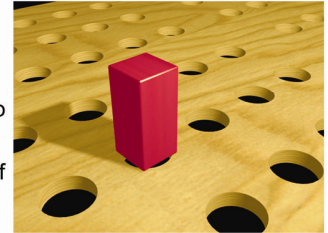


## Upgrading IBM FileNet P8 3.x to IBM FileNet P8 4.5

It could be like trying to put a square peg in a round hole...if you do it alone.

### CHALLENGES your company may face tackling a system upgrade:

- FileNet P8 3.x to P8 4.x is a change of underlying architecture from Microsoft technology to J2EE technology that may be of unfamiliar territory for your in-house resources.
- Costly Maintenance of System Administration: Installation & Configuration expertise is very costly to acquire and maintain and the infrequency of usage are inefficient to have in-house resources.
- The Chicken and Egg problem: mapping data and security structures requires detailed knowledge of both old and new versions – BUT you would not gain expertise until after you've migrated the system.



We have extensive experience performing several successful upgrades. You will have a transparent view of the upgrade tasks via our methodology, project plans, reports and as-build documentation for your future reference. Contact us for assistance with your FileNet P8 upgrade.

## Need to migrate or consolidate your images, documents, and COLD reports to the latest IBM ECM product suites?

### Migrating FileNet Panagon IS 3.x, 4.x system to FileNet P8 4.5

#### STUMBLING BLOCKS to clear in your IS to P8 migration

- Panagon IS and P8 are two different products based on different architectures.
  - Content Federation Services vs. Data Migration options
  - Applications developed on Panagon IS must be converted to P8 ECM applications.
  - Storage options may not be supported on the new system
  - Migrating large volumes of data in a timely manner requires experience and high performance migration tools.
  - The migration process should not impact or interrupt production.
- Softech's experience and migration tools can isolate impact to the production environment.

### Migrating FileNet Report Manager to IBM Content Manager OnDemand (CMOD)

#### HURDLES to overcome migrating your RM to CMOD.

- FileNet Report Manager and IBM CMOD are two different products. Performing the migration successfully in a timely manner requires extensive product knowledge and experience in addition to robust and high performance migration tools.
  - IBM CMOD is IBM's direction for Report Management.
  - Exporting data from RM is challenging due to its proprietary storage format.
  - Mapping RM report formats and templates to CMOD report templates require knowledge on both products.
- Softech's tools and processes have been successfully used and deployed in customer projects.

Platinum Sponsor  
of 2010  
Austin ECM UserNet

Visit us at our booth and Breakout Session:  
Upgrading and Migrating to IBM FileNet P8



- Child Services Enforcement
- Motor Vehicle Citation Processing
- Contracts Lifecycle Management
- Land Survey Workflow and Reporting
- DataTran
- Offline Content Access

www.softechis.com

Softech & Associates, Inc.

877-638-3241

## Breakout Session Information

Category	Breakout	Speaker(s)	Summary
Case Study	Advanced Security Using Marking Sets	Brad Growt, Pedernales Electric Cooperative and Bowie Tio, Adjacent	Marking sets offer the ability to secure an object based on the value of one of its properties. Markings sets do not override the normal security on the object, but work with it to provide an additional security layer. Join Pedernales Electric Cooperative (PEC), the largest electric cooperative in the United States, and Adjacent Technologies, an IBM Partner for ECM, for a conversation on the use of marking sets in IBM FileNet P8 to meet complex security requirements. Hear about PEC's recently completed upgrade to P8 4.5 from Content Services (CS) and the steps taken to address security and to architect a solution while meeting critical challenges. Learn about the evolution of the solution through the evaluation of options for a customized application versus an out-of-the-box WorkPlace approach. Ask questions of the lead business representative and technical architect, and come away with best practices from this highly successful conversion and application deployment.
Customer Case Study	Apache User Experience: Do's and Don'ts of implementing FileNet P8 for RIM Compliance	Donna Rose, Apache Corp.	<p>Apache Corporation began the ECM Journey in 2006. The program will discuss the groundwork necessary to implement an enterprise system; the falsehood that technology is the total solution; and the importance of process analysis and implementation strategy.</p> <p>The speaker, Donna Rose, is the Global Records and Information Manager responsible for Enterprise Content Management (ECM) strategies and programs for Apache Corporation. Her areas of expertise include RIM strategies, records retention, technical records program development, records storage operations, business process analysis and business process management (BPM).</p>
Content Management	Best Practices in Content Manager OnDemand Conversions	Vanessa Stonesifer	Learn what to consider before launching into a migration to Content Manager OnDemand. Topics will focus on methodology and best practices to follow, when performing a content archive migration. Discussions will also include customer experiences.
Process Management	Business Process Manager (BPM)	William Mills	This session will examine what's new with IBM Business Process Manager.
Process Management	Case Management is not just for cases – and what does it have to do with BPM?	William Mills	Learn how IBM FileNet ACM enables your organization to save time, gain confidence and create accountability for decisions being made on a case-by-case basis. ACM takes the concept of case management to new heights putting the goal of making the best possible business decision for every case - every time. IBM FileNet ACM provides a framework for case management across many industries and functions - learn how case management can be applied to customer service centers, claims handling, new account opening, HR on-boarding, fraud detection and more.
Discovery and Analytics	Content Classification: Critical to Assessment, Collection & Archiving	Paul O'Hagan	Organizations are increasingly striving to harness unstructured content through content collection and archival, records management, eDiscovery solutions, and more. These initiatives demand an understanding of the content: one that provides insight on the meaning and value of the information. The IBM InfoSphere Classification Module shifts the intelligence and cost burden away from employees by automating content-centric categorization decisions via analysis of the full text of documents and emails. By scaling content analysis capabilities beyond over-burdened employees, you can use advanced classification to better understand your content in the wild, set your information governance plan and accelerate your compliance initiative roll-out.

Category	Breakout	Speaker(s)	Summary
Discovery and Analytics	Content Decommissioning with InfoSphere Content Assessment	Rashmi Vittal	Lacking insight into their 'content in the wild', organizations are stuck in a cycle of "keeping everything" and escalating costs. This can change now with IBM's new InfoSphere Content Assessment. Learn how IBM's unique Dynamic Analysis technology powers this solution for understanding your organization's content. With insight comes the ability to decide what content is unnecessary and what is necessary. Armed with this knowledge your organization can decommission the unnecessary while preserving and exploiting the content with business value.
Platform and Migration	Content Federation and Integration - Unlocking the Value of Distributed Content	Rob Finn	Companies need a way to effectively manage unstructured content held in multiple disparate repositories without being forced into content migrations. IBM puts customers back in charge by enabling them to manage content in place using IBM's content federation and integration offerings. New packaging changes make this easier and less expensive than ever before. Learn about the content federation services capabilities now available within IBM FileNet Content Manager, and about IBM Content Integrator (previously known as IICE). Whether your strategy is to standardize on P8 or to expand in an IBM CM8-centric strategy, this session will explain the latest federation and integration solutions provided.
Platform and Migration	Developing Agile ECM Widgets for FileNet P8	Anand Iyer	The IBM FileNet P8 4.5 suite provides a standards-based set of extensible pre-wired ECM Widgets that provide key process and content functionality. In this session we will extend these capabilities by presenting a technical discussion of design, development and deployment of custom ECM Widgets. We will discuss the architecture, development and deployment of FileNet P8 Content based iWidgets using an Eclipse based IDE, the Dojo Java scripting framework and a custom REST API, followed by a demonstration of 2 such widgets that were developed using the above framework. The out of the box ECMViewer widget will also be used to demonstrate how user developed widgets can be easily wired with an out of the box widget to enhance widget re-usability. This session will have a demo and Code Walkthrough.
Platform and Migration	DIY Migrations: P8 3.5/4.0 to P8 4.5	Russell Raff and Ernie Bahr, ECMG	<p>As standard support for P8 3.x nears its end, there are several possible paths to take when looking at upgrading/migrating older P8 systems to the new P8 4.5x platform – all of which are valid for particular scenarios.</p> <p>We will discuss which approach is most appropriate when:</p> <ul style="list-style-type: none"> <li>• Moving entire object stores over “As-Is”</li> <li>• Wanting to implement “Lessons learned” in terms of Object Store, Security model and Taxonomy design</li> <li>• Needing to migrate with finer granularity (for example Doc-Class by Doc Class)</li> <li>• Consolidating Legacy FileNet and 3<sup>rd</sup> party repositories using one set of tools</li> <li>• Changing underlying FileStore Operating System or the RDBMS</li> </ul> <p>The specific use cases discussed will be driven or created by audience participation. Come along and influence which topics are covered.</p>
Content Management	Driving Down Costs Using Capture ADR	Amit Saha	In the current economy, organizations are investing in software solutions that can deliver measurable reductions in cost and risk from their operations. Capture Advanced Document Recognition (ADR) delivers significant operational cost savings by using existing ECM infrastructure to automate existing capture processes. Adding automation specifically reduces document preparation and data entry costs, thereby improving data quality and productivity with fewer resources. This session shows real examples of how Capture ADR improves the overall business process, enhances productivity and removing the highest single cost of ECM operations. The session provides both case studies detailed product information and is appropriate for both business and technical audiences.

Category	Breakout	Speaker(s)	Summary
Process Management	Extend the Value of BPM for Performance and Decision Management	William Mills	A Business Process Management System (BPMS) enables process automation so your company stays lean, effective, and efficient in this competitive economy. Are you taking it to the next level to analyze performance, monitor operations, optimize the business, and leverage rules for decision management? Learn about Cognos Business Intelligence (BI), WebSphere ILOG Business Rules Management (BRM), and how these solutions integrate with IBM FileNet Business Process Manager so you may extend the value BPM for better performance and more agile decision management.
Hands-On Labs	Get Your Hands on IBM FileNet BPM 4.5.1 and the new ECM Widgets 4.5.2	Steve Bass	This hands-on session will provide an overview of how business users and their IT partners can rapidly and easily deploy ECM capabilities. Mashups and ECM Widgets allow ECM applications to be quickly built using Web 2.0 based mashup pages and ECM Widgets. These mashup pages are created using a simple web based drag and drop environment and can include not only ECM Widgets, but other 3rd party widgets. Included with BPM 4.5.1 is an IBM mashup platform and ECM specific widgets that once mashed together, can create complete applications that address daily business challenges. Come take a 50 minute hands-on tour of the enhancements in process design and the ECM Widget capability of IBM FileNet BPM 4.5.1 that will make you more agile.
Content Management	IBM Content Manager	Amit Saha	This session will examine the capabilities IBM Content Manager provides to meet your business needs now and into the future.
Content Management	IBM Content Manager OnDemand: your 'View Not Print' solution for ECM	Louise Hawley	<p>Managing enterprise report data is critical to customers being able to control costs, increase user and customer satisfaction, and provide the broad range of services demanded by 'front' and 'back' office applications. No matter which IBM ECM repository you use, the latest version of Content Manager OnDemand (CMOD) enables you to access and leverage your enterprise report documents from within your Content, Process and Compliance applications; see how IBM FileNet P8 can leverage enterprise report management documents stored in CMOD.</p> <p>Included in the presentation will be a high level technical architecture review, customer success stories, how one can obtain ROI and what's new. At the end of this session you will have been introduced to the overall benefits of Content Manager OnDemand and understand how this solution can be used in your enterprise. You will see the latest enhancements and understand how CMOD documents can be accessed from IBM FileNet P8 - with example use cases and a demonstration of the recently added functionality.</p>
Archive and Governance	IBM eDiscovery - Best Practices to Cut Costs and Deliver Early Case Insight	Frank McGovern	The huge volume of electronically stored information (ESI), compressed response schedules and expensive discovery processes necessitate cost cutting, practical eDiscovery solutions. Learn about best practices for moving eDiscovery in-house, proactively managing ESI to reduce volume and gaining early case insight, leveraging IBM's leading eDiscovery solutions with new capabilities for quick culling, dynamic collection, and early case assessment. Examine how you can help cut costs and risks by understanding key case facts, finding critical pieces of evidence, discovering communication patterns and forming case strategies before entering into costly processing and review cycles. Explore how IBM InfoSphere eDiscovery Manager and eDiscovery Analyzer, core elements of the IBM Smart Archive and Information Lifecycle Governance solutions, help organizations gain agility to produce trusted, defensible legal responses while reducing attorney review costs.

Category	Breakout	Speaker(s)	Summary
Content Management	IBM FileNet Content Manager – the core content management solution for FileNet P8	Rob Finn	<p>IBM FileNet Content Manager has matured into an offering that goes far beyond core content repository functions. Now including non-chargeable components* such as DB2, WebSphere Application Server, Content Federation Services (CFS), FileNet Content Manager SharePoint Web Parts, FileNet Integration for Microsoft Office, WorkPlace XT and DITA standards for advanced document management. Join Robert to learn about the latest capabilities of IBM FileNet Content Manager version 4.5.1, and see how it's many features and components broad and flexible platform for the FileNet P8 family of offerings. Making Essential ECM a reality, IBM FileNet Content Manager enables your company to take advantage of the content management repository which offers the greatest depth and breadth of functionality in the industry.</p> <p>* restricted use license terms apply</p>
Content Management	IBM FileNet P8 101 (An introduction to IBM ECM P8 for FileNet Customers)	Rusty Brown	<p>IM, CM, CFS, CE, PE, IMAE, AE - what do they all mean? What do I do with my current applications if I go to P8? Is Image Services going away? How about Content Services? How do I get all my documents into P8? How do I make everything work together? What about security? This session will answer your P8 questions in a simple, easy to understand way.</p>
Content	IBM FileNet System Monitor (FSM) in P8 and CMOD Environments	Steve Bass	<p>Explore new features available to monitor both P8 and CMOD environments. Learn about a new exciting add-on to FSM that allows for end to end performance monitoring from an end user perspective. Now FSM provides the ECM Administrator true insight into platform performance from the ECM back end and ECM front end as experienced by the end user. Case studies will demonstrate the diagnostic value and performance tuning opportunities available with FSM. Come see what's new for FSM in 2010!</p>
Archive and Governance	IBM InfoSphere Content Collector: more than e-mail, more than archiving, more than an isolated solution	Greg Young	<p>IBM InfoSphere™ Content Collector software is a family of content collection and archiving offerings and partner solutions based on a modular, extensible architecture that enables organizations to gain control of information growth to better manage, trust and leverage information. InfoSphere Content Collector software empowers you to better manage—and use—your business content whether email, files, SharePoint, SAP or more as you enforce compliance and operational policies, all while reducing your total cost of ownership (TCO) and being a strategic ingredient of the IBM Smart Archive strategy. This session will take a deeper look at what's new with the IBM Content Collector family. Learn about new features and capabilities as well as what's next on the product roadmap.</p>
Archive and Governance	IBM Smart Archive - Take A Smarter Approach to Archiving with IBM	Greg Young	<p>Most organizations today are looking for smarter ways to manage the volume, variety and velocity of information growth. Whether driven by optimization for operational efficiency, regulatory compliance or eDiscovery mandates, you need a smarter archive strategy to :</p> <ul style="list-style-type: none"> <li>• Take control of data growth and understand what information you have, that then needs to be collected and archived based on its relevance</li> <li>• Support information retention needs with simplicity and flexibility while reducing costs and increasing operational efficiencies</li> <li>• Protect and produce trusted information with confidence and reduce business risks and legal costs</li> </ul> <p>IBM can help. The IBM Smart Archive strategy is a smarter approach to archiving with a unified, integrated and information-aware approach- one that leading industry analysts have called "strategically compelling" and "the most comprehensive archiving vision that a vendor has yet demonstrated"</p>

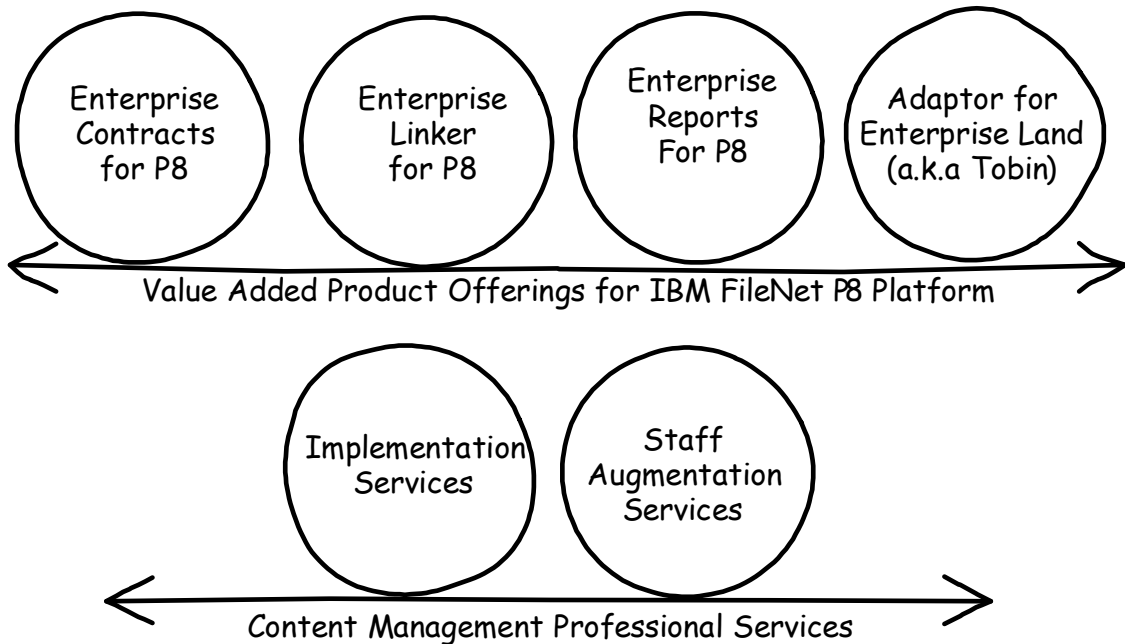
Category	Breakout	Speaker(s)	Summary
Archive and Governance	Information Lifecycle Governance and Trusted Content	Frank McGovern	Every organization has Trusted Content—that content which is authentic, reliable and trustworthy. In today's environment, it is becoming critical to properly govern content throughout its lifecycle to ensure its trustworthiness - whether for compliance, to respond to eDiscovery, or for good business practices. However, organizations struggle with finding ways to do this in a consistent, accurate, and cost-effective manner, without placing a burden on their users. IBM's Information Lifecycle Governance (ILG) model (previously known as Compliant Information Management) provides the capabilities and a prescriptive approach to reduce the complexity, lower risks and costs, and deliver improved business agility for Trusted Content. This session will discuss ILG strategies, offerings, experiences and best practices.
Hands-On Labs	InfoSphere Classification Module (ICM)	Barton Emanuel	This hands-on session will provide a high-level overview of content-based and rule-based classification with InfoSphere Classification Module (ICM). We will use the ICM Classification Workbench to examine a Knowledge Base (KB) for content-based classification, and a Decision Plan (DP) wrapping the KB with a set of configurable rules. We will then use the Decision Plan and the Filesystem Classification Center to move files to folders in the filesystem based on content and rules.
Content	Kofax Enterprise Capture: seamlessly extending your IBM ECM investment... Get the most OUT by getting the most IN	Mark Golden, Kofax	<p>Capturing business critical information wherever and in whatever format it enters your organization – paper, fax, email, structured or unstructured. Transforming these into process-ready, high quality information. Delivering this information to whomever, wherever needed. Seamlessly integrating with your ECM platform. Traceable, secure from the first point of entry to final archival, across the entire organization.</p> <p>This is how Kofax helps customers automate and streamline business critical document driven processes, such as invoice processing, claims processing, records management, account opening and many others, and maximize their ECM investment.</p> <p>In this session you will hear about the concept of our Enterprise Capture Platform and customer use cases. Most importantly, you will learn of measurable successes: reduction of cost and risk and increase of information quality, operational efficiency, and customer service quality.</p>
Platform and Migration	Lessons from the Field: FileNet P8 3.x to 4.x Upgrade/Transition	Doyle Wilson	<p>Get a jump start on your move to FileNet P8 4.5! Join the IBM ECM Lab Services experts for a real-world "FileNet P8 3.5 to 4.5 Upgrade/Transition Deep Dive". Learn from our experiences to help you plan wisely and avoid potential pitfalls.</p> <p>Gain valuable insights into the following AND MORE.</p> <ul style="list-style-type: none"> <li>• Business and technical considerations <ul style="list-style-type: none"> <li>▪ Infrastructure conversion (platform, database, J2EE, LDAP)</li> <li>▪ Load balancing / high availability</li> <li>▪ Separation of data (object stores/process) along business functional lines</li> <li>▪ Transition best practices</li> <li>▪ Considerations for use of a staging environment</li> </ul> </li> <li>• Options considered for breaking the transition into phases <ul style="list-style-type: none"> <li>▪ Custom application readiness</li> <li>▪ FileNet P8 Add-On applications</li> <li>▪ LDAP conversion requirements</li> </ul> </li> </ul>
Discovery and Analytics	Maximizing Collaborative Content with Search	Paul O'Hagan	IBM OmniFind Enterprise Edition is IBM's flagship enterprise search offering, enabling you to create a rich, unified, and secure search experience for users across IBM Lotus and IBM WebSphere offerings, including Lotus Quickr, Lotus Domino, Lotus Connections, and WebSphere Portal, as well as other environments, such as Microsoft SharePoint, IBM FileNet P8, and relational database management systems. This session will review the functional capabilities of OmniFind through customer experience stories, and provide a sneak-peek preview of our planned future release.

Category	Breakout	Speaker(s)	Summary
Discovery and Analytics	Optimize Business Insights with Cognos Content Analytics	Rashmi Vittal	Get ahead of the curve with new business insight and optimization from unstructured and semi-structured content like documents, reports, emails, web pages and much more. Leverage IBM Cognos Content Analytics to expose trends, patterns, anomalies, and opportunities locked away in vast amounts of content and enable rapid and informed business decisions. Learn from our experts in the Text Analytics Group how they built comprehensive content analytics solutions to gain insight into key content-rich business processes and expose new understanding about your customers, markets, and operations. See how leading organizations are driving smarter business decisions from content, and how you can do the same.
Platform and Migration	P8 3.5.x to 4.x Application Migration Guidelines and Best Practices	Anand Iyer	This session will provide guidelines and best practices on migrating custom applications from FileNet P8 3.5.x platform to FileNet P8 4.x. The re-architecture of P8 4.0 impacted several areas of the Content Engine API that will require existing custom applications to change. Moreover, the introduction of J2EE container for the Content Engine also resulted in changes to the security and event model. The guidelines and best practices described will be for FileNet P8 3.5.x Application migration only. Data or Platform migration strategies will not be covered. Furthermore, the session will be limited to migration of applications that use the following mentioned APIs or modes of integration. Any other P8 expansion product API's will not be covered in this session.
Discovery and Analytics	Ready, Set, Go! Create Actionable Business Insights with Trusted Content Analytics	Rashmi Vittal	Trusted Content Analytics enables you to know, trust and leverage your content, helping you reduce costs while generating actionable business insights. If you would benefit from being able to 1) dynamically analyze your content and make rapid decisions to cut costs and optimize storage, 2) trust your content to create more complete 'single versions of the truth' for customers and citizens as required as part of master data management initiatives or 3) learn how leverage your content and use it for predictive purposes to spot issues and trends that fall outside of normal business reporting channels, attend this session. We will discuss how the ECM portfolio - including content analytics, content assessment, master content and search - can help your business achieve these goals.
Archive and Governance	Records Management - Leveraging IBM's Tools and Best Practices	Frank McGovern	Do you have the assurance and confidence that your records - both physical and electronic - are managed consistently and accurately with your organization's policies? Where do you begin? How do you ensure you are retaining your records for the right time and then disposing them when you no longer need them? What about records stored in other systems? What tools does IBM have to help you? How can you save costs by safely disposing of information? Get answers to these questions and more by attending this presentation. Learn about IBM's Records Management solutions, best practices and more. See what other customers are doing.
Platform and Migration	Social, Collaborative and Web Content meet ECM	Cengiz Satir	Many companies have included aspects of basic and web content services in their content management strategy, however a comprehensive strategy for integrating and managing content into their ECM infrastructure has been absent. Business agility and performance means providing the right information to the right constituents at the right time –and in the right context. Join us in learning how IBM's ECM portfolio together with Lotus Quickr, Lotus Notes, and Lotus Web Content Management are enabling organizations to make better decisions faster.
Platform and Migration	Transforming your FileNet P8 System for Information Management & Object Store Best Practices	Rob Rouse	Learn how you can enhance your FileNet P8 experience. Whether you are looking to set up new systems or review the existing FileNet P8 infrastructure, understanding the best practices in FileNet P8 Object Store structure is important to ensure efficiency. Lab Services will discuss the best way to set up your data model, folder structure, and storage, based on Engineering guidelines and years of field experience. This session will have you rethink and rework your existing metadata structures to both normalize and to better take advantage of FileNet P8 Content Manager's information management capabilities.

Category	Breakout	Speaker(s)	Summary
Platform and Migration	Upgrading and Migrating to IBM FileNet P8	David Nguyen, Softech & Associates	<p>Are you moving to FileNet P8 4.5? Are you moving from FileNet Report Manager to CMOD? Softech will present some of the challenges in upgrading and migrating to current IBM ECM offerings and the key decisions you will need to make.</p> <p>This session will discuss three types of upgrade/migrations:</p> <ul style="list-style-type: none"> <li>• Panagon IS/CS to FileNet P8 4.5</li> <li>• FileNet P8 3.x, 4.x to FileNet P8 4.5</li> <li>• FileNet Report Manager to (CMOD) or FileNet Content Manager</li> </ul> <p>Softech's many years of experience, solid references, proven methodology and tools will be presented to assist you in a smooth and successful upgrade or migration.</p>
Customer Case Study	Upgrading P8 3.5.x to 4.5.x Lessons Learned by Panhandle Eastern Pipeline Company	John Poche, Panhandle Eastern Pipeline Company	In 2009, Panhandle Energy upgraded P8 3.5.x to 4.5.1. This discussion includes reviewing the plan, resources, procedures, and lessons learned for this project.



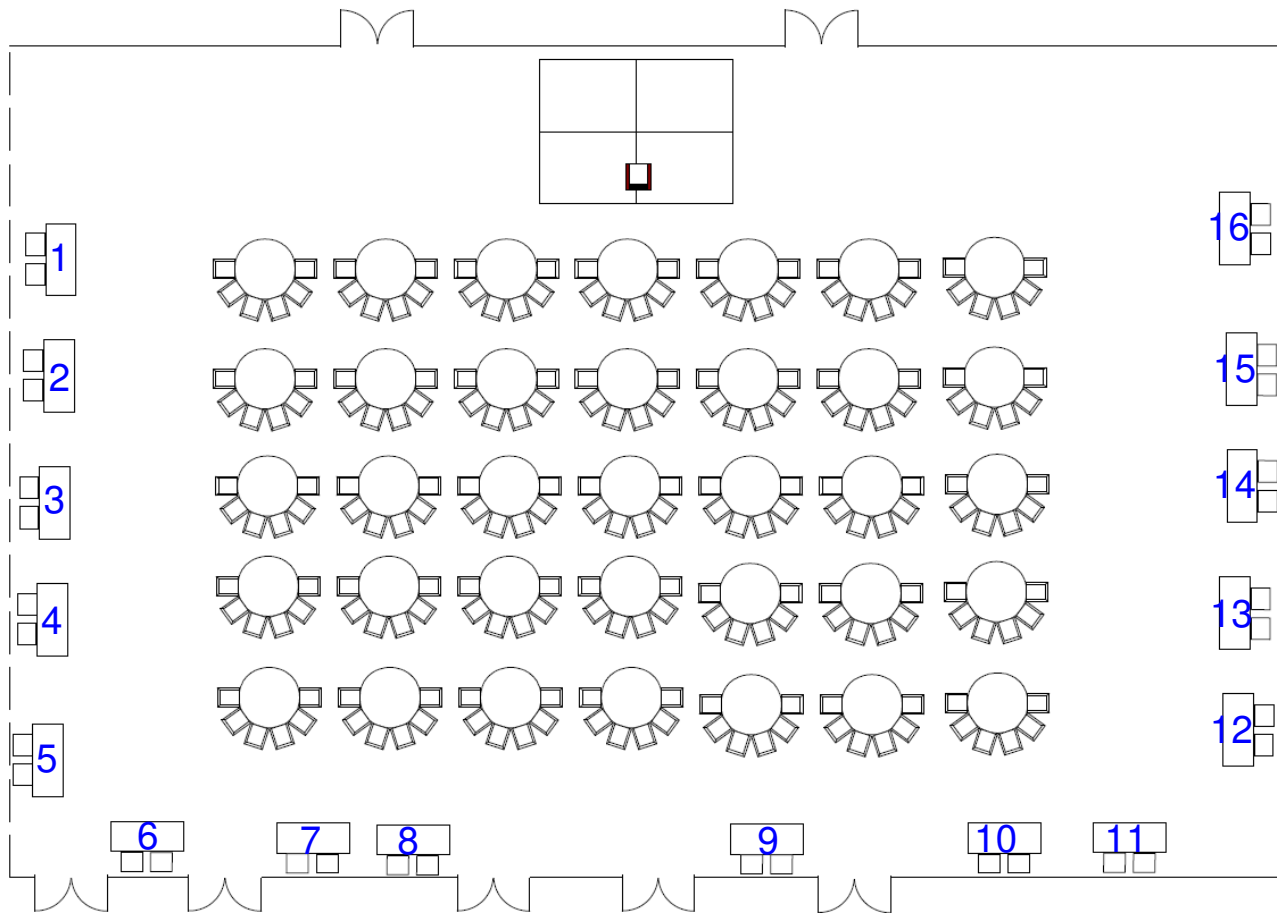
# ContentSilo



www.contentsilo.com  
 Lisle, Illinois | Houston, Texas | Dehradun, India  
 Phone: 630-983-3053 Email: clientdev@contentsilocom

## Exhibition Area

The IBM ECM local user group would like to thank the partners who are participating this year. Without their involvement, this event would not be possible.






Booth #	Sponsor	Booth #	Sponsor
1		9	Enterprise Content Management Group (ECMG)
2	IBM	10	Softech & Associates
3	Snowbound Software	11	Jeskell
4	Perficient	12	enChoice
5	RGB Projects Inc.	13	Integro
6	Content Silo, Inc.	14	Informative Graphics Corp.
7	Adjacent Technologies Inc.	15	Miria Systems
8	Kofax	16	


## PLATINUM Level Sponsors

Sponsor	Description
<p><b>Adjacent Technologies, Inc.</b></p> 	<p>Adjacent Technologies is an IBM FileNet Value-added Reseller / Support Provider and Kofax Certified Solution Provider. Founded in 2001, we are based in Austin, TX and serve governmental and private sector entities. We employ a highly experienced and dedicated team of certified professionals in the design and implementation of full lifecycle ECM solutions. Our Services range from consulting engagements to turn-key solutions in business process automation, records management, host system integration, system conversions, and recovery strategies.</p> <p>Our mission is helping organizations maximize the value of their ECM investment, resulting in higher productivity, competitive advantages, costs reductions, and a positive impact to their bottom-line.</p>
<p><b>Enterprise Content Management Group</b></p> 	<p>For the 2010 Regional UserNet, ECMG has an exciting array of off-the-shelf tools to address a variety of needs: Legacy FileNet migration into FileNet P8, Universal bulk-loading, consolidation of multiple content management systems, migration of Network Shares into your ECM system... the list continues...Our tools can be used by Content Management System administrators, Record coordinators and Network Admins alike. These tools are intuitive, powerful and easy to use, and can be deployed by both internal and partner resources.</p> <p>Imagine using just one tool to consolidate the content from the various legacy systems your organization has deployed over the eons, mapping all the partial taxonomies to your new enterprise classification scheme, and not having to re-invent the wheel in a year when you have to bulk load data from some or other merger/acquisition...</p> <p>ECMG (Enterprise Content Management Group) is focused entirely on the ECM space – find out more at: <a href="http://www.ecmg.com">www.ecmg.com</a>  <b>Website: <a href="http://www.ecmg.com">www.ecmg.com</a></b></p>
<p><b>Kofax</b></p> 	<p>Kofax plc (LSE: KFX) is the leading provider of document driven business process automation solutions. For more than 20 years, Kofax has provided award winning solutions that streamline the flow of information throughout an organization by managing the capture, transformation and exchange of business critical information arising in paper, fax and electronic formats in a more accurate, timely and cost effective manner. These solutions provide a rapid return on investment to thousands of customers in financial services, government, business process outsourcing, healthcare, supply chain and other markets. Kofax delivers these solutions through its own sales and service organizations, and a global network of more than 1000 authorized partners in more than 60 countries throughout the Americas, EMEA and Asia Pacific. For more information, visit <a href="http://www.kofax.com">www.kofax.com</a>.</p> <p><b>Website: <a href="http://www.kofax.com">www.kofax.com</a></b></p>
<p><b>Softech &amp; Associates</b></p> 	<p>Softech &amp; Associates is an IBM FileNet Premier partner, implementing FileNet ECM solutions for over 15 years. Softech has been providing ECM solutions for IBM FileNet clients featuring FileNet Capture ADR, Kofax, Image Services, FileNet Content Manager, BPM, BPF, eForms, Record Manager and IBM Content Manager OnDemand (CMOD). Our Child Services Enforcement, Contracts Lifecycle Management, Land Survey Workflow, and Motor Vehicle Citations Processing solutions allow IBM ECM customers to better leverage their investment. Softech's service team can assist in IBM ECM system installation, upgrade, design and architecture and application development. As an authorized IBM FileNet Technical Support Provider Softech provides direct customer support to FileNet clients. Softech provides media migration, system conversion, database, and hardware platform migration for over 170 clients in the government, financial, insurance and medical sectors. Softech is ready to assist customers that will need to upgrade from IBM FileNet Content Manager 3.5.x and 4.0.</p> <p><b>Website: <a href="http://www.softechis.com">www.softechis.com</a></b></p>

## GOLD Level Sponsor

Sponsor	Description
<p><b>ContentSilo, Inc.</b></p> 	<p>ContentSilo specializes in content management related services and value added product offerings. With offices in Illinois, Texas, and India, the company is able to serve its wide array of clients including oil and gas/energy, financial institutions, and public sector clients.</p> <p>ContentSilo's value added product offerings include Enterprise Contracts – a contract management solution from a content management perspective, Enterprise Reports – user driven reporting solution for content management and Enterprise Linker - an intuitive non-intrusive utility, which allows access of content from 'any' external application.</p> <p>ContentSilo's solution offerings include end to end system integration services including, upfront consulting/study, vendor evaluation, system analysis, installation and configuration, and custom development.  <b>Website: <a href="http://www.contentsilo.com">www.contentsilo.com</a></b></p>
<p><b>Jeskell</b></p> 	<p>Jeskell, Inc. is a top-tier IBM Premier Business Partner with 18 years of experience as a ValueNet Partner. We are a true one stop source of complete ECM and IT solutions for commercial, government, and educational organizations of every size.</p> <p>Jeskell ECM Products and Services include:</p> <ul style="list-style-type: none"> <li>• IBM FileNet Hosted solutions – one monthly fee for full service ECM</li> <li>• IBM FileNet P8 hardware/software/configuration Bundles</li> <li>• U.S. distributor for OpenWorkdesk and ZIOI – the keys to end user adoption</li> <li>• fnCS2CM – Panagon CS and IS migration packages</li> <li>• Tier 1 Software ValueNet Support Provider</li> <li>• One of the largest integrators in North America (VARBusiness 500)</li> <li>• One of the top 100 U.S. integrators serving federal, state, and local government agencies (GovernmentVAR)</li> </ul> <p>We are pleased to be a Platinum sponsor for the Regional UserNets. Please come by and learn how we put the 'E' in ECM.  <b>Website: <a href="http://www.jeskell.com">www.jeskell.com</a></b></p>
<p><b>RGB Projects Inc.</b></p> 	<p>RGB Projects Inc. provides innovative, robust IBM FileNet technology solutions for Enterprise Content Management (ECM) and Business Process Management (BPM). Our team of FileNet consultants leverage decades of experience creating cost-effective ECM and BPM systems to help clients manage content, re-engineer business processes and ensure compliance.  <b>Website: <a href="http://www.rgbprojects.com">www.rgbprojects.com</a></b></p>

## SILVER Level Sponsors

<p><b>enChoice</b></p> 	<p>enChoice® – The Only Choice</p> <p>As a distinguished premier Business Partner, solution provider and software developer specializing in mid-market solutions, enChoice provides a broad spectrum of product, implementation, and support capabilities across the Enterprise Content Management and Collaboration arenas.</p> <p>Enhanced by the recent acquisition of CYA Technologies, enChoice's new range of solutions make us uniquely equipped to serve customers who require world-class systems implemented economically and rapidly, without having to make major investments in their own support infrastructure.</p> <p>enChoice uniquely delivers value, expertise, solution and support capabilities unmatched in the industry. Our solutions include the CTO Innovation Award Winner KwikWork BPF &amp; Universal User Interface; CYA Technologies' SmartRecovery™ data recovery solutions; FileNet P8 and heritage ECM solutions; Tivoli Automation &amp; Security solutions including KwikStart™ for IBM FileNet P8 Monitoring; Portals, Web Content Management, Quickr, Sametime and other Collaboration solutions; Help Desk and Remote System Administration support solutions.  <b>Website: <a href="http://www.enchoice.com">www.enchoice.com</a></b></p>
---	---

<p><b>Informative Graphics</b></p> 	<p>Informative Graphics Corp. offers Brava® for IBM FileNet P8 and Redact-It® for IBM FileNet Capture.</p> <p>Making it easy to securely share content across the enterprise, Brava extends the capabilities of the IBM FileNet P8 platform to include multi-format viewing, annotation, redaction and publishing in one easy interface. Brava can view virtually any format, including office documents, PDF, image formats (like TIFF and JPG), and CAD drawings. Users can add markups, annotations and stamps to any document, so it is perfect for review and approval cycles.</p> <p>Redact-It makes it easy to remove privacy information and sensitive content right at document capture. Seamlessly integrated to IBM FileNet Capture, Redact-It uses complex expressions to automatically redact all instances of a phrase, name, Social Security number, account number and more. Redact-It then automatically releases both redacted and unredacted versions of the file, leaving the source file unaltered.</p> <p><b>Website: <a href="http://www.infograph.com">www.infograph.com</a></b></p>
<p><b>Integro</b></p> 	<p>Email Management..Integro specializes in Email Management, eDiscovery, and Records Management and has helped dozens of companies establish policies and implement systems for the management of millions of mailboxes since before Enron, Worldcom and the escalated importance of email as evidence.</p> <p>We can help save your company money and reduce risk.</p> <p>Integro's product, Integro Email Manager helps companies keep the select few important messages, and auto-disposes the 80% of email which is ROT - Redundant, Outdated and Trivial.</p> <p>Integro teams with IBM and provides all IBM Software, Services and Authorized Training for you to be successful.</p> <p><b>Website: <a href="http://www.integro.com">www.integro.com</a></b></p>
<p><b>Miria Systems</b></p>  <p>Mastering change and risk through complex engineering collaboration</p>	<p>Miria and Sword have teamed up to bring together the right mix of people who have the business knowledge and technical experience necessary to assist your organization in the deployment of complex engineering collaboration.</p> <p>Sword's Fusion for P8 supports distributed project and owner teams, automating key project document control procedures using 100% web-based software. Fusion for P8 ensures that all project information is captured, processed and delivered rapidly. The solution's advanced transmittal and distribution management tools replace slow, repetitive clerical processing.</p> <p>Miria offerings are focused on asset management for the Energy market including engineering document management, work order management, and environmental compliance. Other solutions include Managed\$Pay® for accounts payable and contracts management.</p> <p>Sword delivers high-value business applications to the world's largest companies. A leader in the delivery of Business Process Improvement solutions, Sword's skills, infrastructure and experience help their customers across regulated industries optimize performance, increase efficiencies and maximize ROI.</p> <p><b>Website: <a href="http://www.miriasystems.com">www.miriasystems.com</a></b></p>
<p><b>Perficient, Inc.</b></p> 	<p>Perficient is a publicly traded (Nasdaq: PRFT) IT services company with more than 1000 employees worldwide. We are the largest WebSphere services partner in North America and one of a select few "retained partners" with IBM Software Services for the WebSphere, Lotus and Information Management groups. Perficient has been an IBM 'Premier Partner' for more than ten years and we have helped hundreds of clients implement thousands of solutions using best of breed IBM technologies.</p> <p>We help our clients gain competitive advantage by using Internet-based technologies to make their businesses more responsive to market opportunities and threats, strengthen relationships with customers, suppliers and partners, improve productivity and reduce information technology costs</p> <p>Perficient is world-class talent, delivering world-class technology, on time and on budget.</p> <p><b>Website: <a href="http://www.perficient.com">www.perficient.com</a></b></p>
<p><b>Snowbound Software</b></p> 	<p>Since 1996, Snowbound Software has been the pioneering leader of document viewing and conversion technology. Our powerful solutions accelerate and enhance document and image processing at every point in the document lifecycle - capture, manage/process, deliver and store/archive.</p> <p><b>Website: <a href="http://www.snowbound.com">www.snowbound.com</a></b></p>





## **Platinum Sponsor of the 2010 Austin Texas UserNet Conference**

***A special welcome to our customers in attendance. We value our relationship  
and appreciate your business.***

### **Enterprise Content Management**

Adjacent Technologies provides Enterprise Content Management solutions leveraging IBM FileNet and Kofax suite of products. With both public and private sector expertise, Adjacent is the partner you can depend on to ensure your ECM investment is maximized. Thinking of converting to P8? Stop by and talk with us about proven strategies we employ to streamline the effort.

### **Business Process Management**

Adjacent provides certified experts on business process analysis and design with the goal of delivering creative and innovative solutions leveraging IBM Business Process Management, Business Process Framework, Business Activity Monitor and Process Analyzer.

### **Records Management**

In today's strict regulatory and compliance environment, having complete control of documents throughout their life cycle is critical. Adjacent can help develop an effective records management framework and implementation plan to address complex records management and document retention issues.

### **Service Oriented Architecture**

SOA enables organizations to make business decisions supported by technology instead of making business decisions determined by the technology. Adjacent leverages SOA to build effective solutions that are reusable, easy to maintain and adaptable to an ever changing business climate.



8303 N. Mopac Expressway, Ste. 260-C  
Austin, Texas 78759

Phone: (512) 388-1338

Fax: (512) 388-0836

[www.adjacent-tech.com](http://www.adjacent-tech.com)

### **Other Services**

- ❖ Certified IBM FileNet P8 Installation & Implementation
- ❖ Conversion and Upgrades to P8
- ❖ ECM Solution Architecture & Design
- ❖ BPM, BPF Workflow Specialists
- ❖ Email and Records Management
- ❖ Custom Development in .NET & Java
- ❖ Legacy System Conversions
- ❖ Staff Augmentation
- ❖ Legacy System Image-Enablement and Integration
- ❖ Kofax and FileNet Capture Solutions
- ❖ Certified IBM FileNet Maintenance Provider

**Go Direct**





## Platinum Sponsors of the Austin 2010 Regional UserNet

Come see our break-out session – “DIY Migrations: P8 3.5/4.0 to P8 4.5”



### ECMG's Content Transformation Suite enables you to do your own...

P8 3.5x to P8 4.5 Migrations (Including declared records!)

Panagon CS Migrations	Panagon IS Migrations
GPS/Document Manager to P8 Platform	Citadon CTSpace Migrations
Exchange to-and-from SharePoint	Content Consolidation
Lotus Notes to P8 Migrations	CM8 Migrations
Re-Map Taxonomy while migrating	Bulk Load from File Shares

#### CT Studio

Drag and Drop migration and consolidation  
Prototype taxonomy changes prior to migration  
Declare records while migrating

#### CTS Loader

Automate document loading  
Rapid application integration

#### CTS Universal Bulk Loader

ONE tool for loading content into ANY supported repository  
Apply the same taxonomy to all documents  
Facilitates future content exchange and migration

ecmg

5868 Westheimer, #505, Houston, TX 77057 (ph) 713.344.1066 (fax) 713.344.1517

(E-mail) [info@ecmg.com](mailto:info@ecmg.com), (web) <http://www.ecmg.com>