



## **Washington D.C. IBM ECM Regional UserNet**

**May 4, 2010**

**Crystal Gateway Marriott  
Arlington, VA**

## 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.

Welcome to the 2010 Washington, D.C. UserNet conference here in Arlington, Virginia! 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 your peers.

This is your user conference constructed around your comments, requests, and suggestions. In fact, each year your ideas and comments are used to improve this event. However, these improvements are only possible if we receive feedback from you, so please take a moment to fill out the event survey and feel free to stop any one of the IBM ECM representatives with your comment, suggestions, or just to say hi.

During varying times throughout the day, the exhibit hall will be open for you to visit and discuss your needs with partners and product experts. They are here to interact and provide you with solutions, so we encourage you to maximize your time here by taking full advantage of the many resources available this year. Please take a moment to acknowledge and thank our sponsors, for without their support, this event would not be as great as it is!

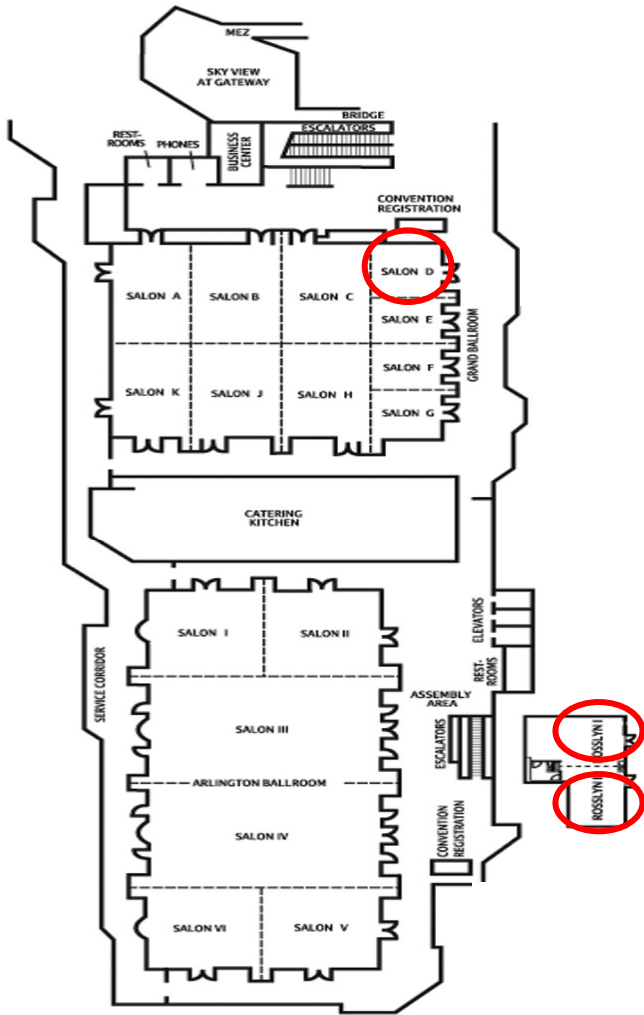
You are encouraged to take full advantage of the many interesting breakout sessions being offered today including those being presented by your colleagues.

Thank you again for attending the 2010 Washington, D.C. area UserNet Conference.

## Breakout Locations

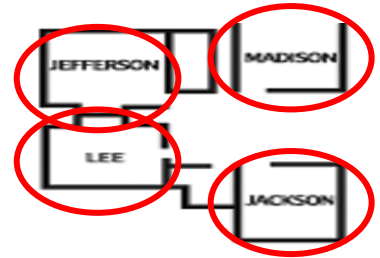
Breakouts take place in the following meeting rooms within the hotel:

### First Floor



Jefferson  
Lee  
Madison  
Jackson

### Lobby Level



Salon D  
Rosslyn I  
Rosslyn II

7:30 a.m. – 8:45 a.m.	<b>Registration and Breakfast</b>							<b>Sponsored by Softech &amp; Associates</b>
8:45 a.m. – 10:30 a.m.	<b>General Session KeyNote Address</b> <b>Ken Bisconti, VP ECM Software Products and Strategy</b> <b>(Ballroom: Salon A-C)</b>							
10:30 a.m. – 10:45 a.m.	<b>Break</b>							
<b>Breakout Rooms</b>	<b>Jefferson</b>	<b>Salon D</b>	<b>Madison</b>	<b>Jackson</b>	<b>Rosslyn I</b>	<b>Rosslyn II</b>	<b>Lee</b>	
10:45 a.m. – 11:35 a.m.	Why did California select OpenWorkdesk over Workplace and XT? A case study based on Vital Records Image Redaction and Delivery	IBM FileNet System Monitor (FSM) in P8 and CMOD Environments	Content Classification: Critical to Assessment, Collection & Archiving	Developing Agile ECM Widgets for FileNet P8	IBM FileNet P8 101 (Introduction to IBM ECM P8 for FileNet Customers)	Ready, Set, Go! Create Actionable Business Insights with Trusted Content Analytics	Records Management - Leveraging IBM's Tools and Best Practices	
11:35 a.m. – 11:45 a.m.	<b>Break</b>							
11:45 a.m. – 12:35 p.m.	Kofax Enterprise Capture: seamlessly extending your IBM ECM investment	OmniFind for Intranet Project	Hands-on Lab: InfoSphere Classification Module (ICM)	Hands-on Lab: Get Your Hands on IBM FileNet BPM and the new ECM Widgets	Case Management is not just for cases - and what does it have to do with BPM?	IBM Content Manager	Information Lifecycle Governance and Trusted Content	
12:35 a.m. – 2:15 p.m.	<b>Lunch and Exhibits Open</b> <b>(Ballroom: Salon A-C)</b>							<b>Sponsored by Jeskell</b>
2:15 p.m. – 3:05 p.m.	Real World Case Management Across the Enterprise:  One Platform – Many Applications	Best Practices in Content Manager OnDemand Conversions	Hands-on Lab: InfoSphere Classification Module (ICM)	Hands-on Lab: Get Your Hands on IBM FileNet BPM and the new ECM Widgets	P8 3.5.x to 4.x Application Migration Guidelines and Best Practices	IBM eDiscovery - Best Practices to Cut Costs and Deliver Early Case Insight	Content Decommissioning with InfoSphere Content Assessment	
3:05 p.m. – 3:15 p.m.	<b>Break</b>							<b>Sponsored by IMC</b>
3:15 p.m. – 4:05 p.m.	Upgrading and Migrating to IBM FileNet P8	IBM Content Manager OnDemand: your 'View Not Print' solution for ECM	Content Federation and Integration - Unlocking the Value of Distributed Content	Transforming your FileNet P8 System for Information Management & Object Store Best Practices	Optimize Business Insights with Cognos Content Analytics	Business Process Manager (BPM)	IBM Smart Archive - Take A Smarter Approach to Archiving with IBM	
4:05 p.m. – 4:15 p.m.	<b>Break</b>							
4:15 p.m. – 5:05 p.m.	IBM InfoSphere Content Collector: More than email, more than archiving, more than an isolated solution	Social, Collaborative and Web Content meet ECM	IBM FileNet Content Manager - the core content management solution for FileNet P8	Maximizing Collaborative Content with Search	Lessons from the Field: FileNet P8 3.x to 4.x Upgrade/ Transition	Driving Down Costs Using Capture ADR	Extend the Value of BPM for Performance and Decision Management	
5:05 p.m. – 7:00 p.m.	<b>Closing Session and Reception</b> <b>(Ballroom: Salon A-C)</b>							<b>Sponsored by Kofax</b>

## Breakout Session Information

Category	Breakout	Speaker(s)	Summary
Content Management	Best Practices in Content Manager OnDemand Conversions	Louise Hawley	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)	Michael Braendel	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?	Michael Green	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	Josh Payne	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.
Discovery and Analytics	Content Decommissioning with InfoSphere Content Assessment	Josh Payne	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	Reggie Twigg	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	Bill Wilkins	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.

Category	Breakout	Speaker(s)	Summary
Content Management	Driving Down Costs Using Capture ADR	Reggie Twigg	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.
Process Management	Extend the Value of BPM for Performance and Decision Management	Michael Green	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	Robert Bridges and 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	Rob Weaver	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	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.  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.
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	Kirk Stewart	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.
Content Management	IBM FileNet P8 101 (An introduction to IBM ECM P8 for FileNet Customers)	Brian Gour	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.
Content	IBM FileNet System Monitor (FSM) in P8 and CMOD Environments	Steve Bass	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!
Archive and Governance	IBM InfoSphere Content Collector: more than e-mail, more than archiving, more than an isolated solution	Craig Rhinehart	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.
Archive and Governance	IBM Smart Archive - Take A Smarter Approach to Archiving with IBM	Craig Rhinehart	<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>
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.

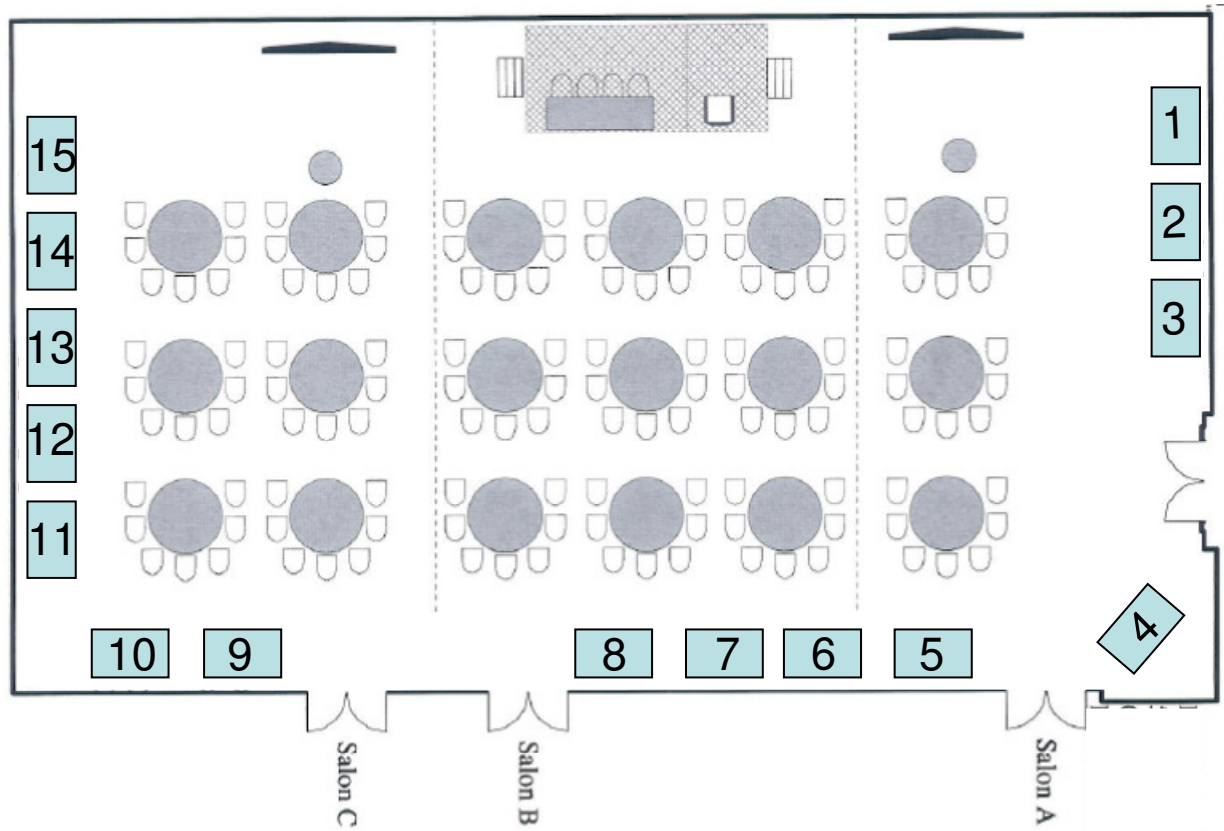
Category	Breakout	Speaker(s)	Summary
Hands-On Labs	InfoSphere Classification Module (ICM)	Amit Saha and Barton Emanuel	This hands-on session will provide a high-level overview of content-based and rule-based classification with InfoSphere Classification Module (ICM). We will use the ICM Classification 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 Learned from the Field: FileNet P8 3.x to 4.x Upgrade/Transition	John DiStefano	<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	Barton Emanuel	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.
Customer Case Study	OmniFind for Intranet Project	Terry Dellavecchia, McCormick	The goal of the Intranet Project is to provide all McCormick employees worldwide with a consistent web experience while using the corporate intranet. OmniFind is being implemented as the enterprise search engine.
Discovery and Analytics	Optimize Business Insights with Cognos Content Analytics	Josh Payne	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.

Category	Breakout	Speaker(s)	Summary
Platform and Migration	P8 3.5.x to 4.x Application Migration Guidelines and Best Practices	Bill Wilkins	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	Barton Emanuel	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.
Case Management	Real World Case Management Across the Enterprise: One Platform – Many Applications	Scott Hastings, John Masters, and Paul Krumpe IMC	How do new and existing technologies fit in to your organization's approach to Case Management? Whether you reuse components of your existing IT resources or add a platform to enhance results, there is a proven way to combine Document Management, Business Process Management and Collaboration tools to create an effective Smart Case Management (SCM) platform. This forward-thinking presentation will take you through a unique approach to analyzing your organization's requirements, and will explore real world examples of how multiple case management applications like Contracts Management, FOIA, Correspondence Tracking, Grants Management, and others can be deployed on a unified IBM ECM platform. This session will also include a review of case management lessons learned by Scott Hastings, former Chief Information Officer of the Department of Homeland Security Department's U.S. Visitor and Immigration Status Indicator Technology.
Archive and Governance	Records Management - Leveraging IBM's Tools and Best Practices	Bill Neale	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.

Category	Breakout	Speaker(s)	Summary
Platform and Migration	Transforming your FileNet P8 System for Information Management & Object Store Best Practices	Michael Oland	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.
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>
Case Study	Why did California select OpenWorkdesk over Workplace and XT? A case study based on Vital Records Image Redaction and Delivery	Rakesh Shah, Jeskell	<p>Successful "Enterprise" Content Management solutions require you to meet the needs of many users. This session explains how applications can be rapidly delivered and tuned specific to the needs of each business user without reliance on traditional API programming. We share proven alternatives to Workplace and XT besides custom building an application from scratch.</p> <p>The California Department of Public Health (CDPH) is used as the example to show how new tools and techniques were used to deliver the Vital Records Image Redaction and Statewide Access solution. This solution includes a large Image Services infrastructure that was expanded to include a new P8 Content Manager and Business Process Manager system and a redaction sub-system fronted by the OpenWorkdesk based end user application.</p> <p>In this discussion you will learn the factors that made this the right solution for CDPH, the project techniques used to ensure a successful deployment, and facts about the productivity improvements associated with using OpenWorkdesk for enterprise level applications.</p>





## 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	Integro	9	ASE Technologies
2	Snowbound Software	10	Fairfax Data Systems, Inc.
3	IMC	11	enChoice
4	Jeskell	12	Xenos
5	Kofax	13	Miria Systems
6	Softech & Associates	14	CAS Severn, Inc.
7	Raimist Software	15	
8	IBM Software Collateral Table		

## PLATINUM Level Sponsors

Sponsor	Description
<p><b>IMC</b></p> 	<p>IMC is an IBM FileNET ValueNET Partner and an award-winning consulting and technology firm known for providing leading Enterprise Content Management (ECM) solutions. Our value-added solutions commonly focus on standardizing, streamlining and automating content management environments to simplify processes, optimize operational efficiencies and reduce costs. IMC has developed specialized solutions for contracts management, records management portals, rate case, business line operations and compliance. We leverage proven methodologies and in-house expertise to deliver powerful and cost-effective solutions designed to meet clients' precise needs.</p> <p>Founded in 1981 and headquartered in Reston, Virginia, IMC's content management related solutions and technologies have been used across companies including Allegheny Power, Memorial Hospital, Chicago Board Options Exchange, Sara Lee and Harley Davidson. For Federal agencies, IMC has won back-to-back "Contractor of the Year" awards and has been listed in the Top 20 "Ones to Watch" and among the Top Fast-Growth companies by Government Computer News (GCN).</p> <p><b>Website: <a href="http://www.imc.com">www.imc.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.</p> <p><b>Website: <a href="http://www.jeskell.com">www.jeskell.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</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>

## SILVER Level Sponsors

Sponsor	Description
<p><b>ASE Technologies</b></p> 	<p>Riptide provides IBM FileNet P8 users with an output management solution. Built as a web application, Riptide provides users with server side printing, emailing and faxing. Supported formats include all image formats, Microsoft Office and Adobe PDF. Riptide is a full featured output management solution with load balancing, reprinting functionality and support for pre and post job-ticketing. The solution is architected to support high volume output requirements yet can be used for all of an organizations output needs. Packet assembly to large batch printing is fully supported. Riptide can be programmatically accessed through Riptide's XML post API or as a multi-select action within IBM's WorkPlace.</p> <p>Features &amp; Benefits:</p> <ul style="list-style-type: none"> <li>• Print disparate content types</li> <li>• Automate customer specific deliverables.</li> <li>• Add cover pages and watermarks to output</li> <li>• Output to email, fax, CD or directory path</li> <li>• Recommit content back into P8</li> </ul> <p><b>Website: <a href="http://www.ase-tech.com">www.ase-tech.com</a></b></p>
<p><b>CAS Severn, Inc.</b></p> 	<p>CAS Severn has been working for over 30 years helping companies, government agencies and education sector customers maximize their IT investments by providing end to end technology solutions with regards to system &amp; storage management, enterprise security management, enterprise content management, application development and IT staff augmentation.</p> <p><b>Website: <a href="http://www.cassevern.com">www.cassevern.com</a></b></p>
<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.</p> <p><b>Website: <a href="http://www.enchoice.com">www.enchoice.com</a></b></p>
<p><b>Fairfax Data Systems</b></p> 	<p>Fairfax Data Systems is a consulting and software development company which provides P8 migration and IBM ECM upgrade solutions. Fairfax has a proven P8 migration tool and methodology, which can easily move ECM solution to P8. Fairfax brings over 12 years of experience designing and delivering solutions that leverage the strengths of these products in many industries, specializing in providing quality information and business process management solutions using IBM FileNet P8 technology. Fairfax offers an array of products and services that help customers successfully deploy and support solutions built upon IBM ECM products. Visit us at <a href="http://www.fairfaxdatasystems.com">www.fairfaxdatasystems.com</a></p> <p><b>Website: <a href="http://www.fairfaxdatasystems.com">www.fairfaxdatasystems.com</a></b></p>

## SILVER Level Sponsors (cont.)

<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. <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. <b>Website: <a href="http://www.miriasystems.com">www.miriasystems.com</a></b></p>
<p><b>Raimist Software</b></p> 	<p>Raimist Software is an IBM ECM Partner working closely with the IBM Federal ECM Team. We are the premier IBM ECM provider at the U.S. Nuclear Regulatory Commission since 2004.</p> <p>Raimist Software specializes in building secure IBM FileNet P8 Enterprise Records Management Systems for the Federal Government, Financial Services firms, Healthcare Systems, and large Insurance companies.</p> <p>We help organizations make their confidential, classified, and public documents accessible worldwide under the protection of the most advanced security controls.</p> <p>Our solutions conform to Federal Information Security standards including FIPS 140-2 compliance.</p> <p>Please contact us at: <a href="http://www.RaimistSoftware.com">www.RaimistSoftware.com</a> 703-568-7638 <a href="mailto:info@RaimistSoftware.com">info@RaimistSoftware.com</a></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. <b>Website: <a href="http://www.snowbound.com">www.snowbound.com</a></b></p>
<p><b>Xenos – An Actuate Company</b></p> 	<p>Xenos provides high-performance solutions that optimize enterprise content management (ECM) implementations by streamlining the movement of information across the enterprise and slashing document storage costs. Xenos solutions, based on the scalable Xenos Enterprise Server™, process, extract, transform, repurpose and personalize high volumes of data and documents for storage, real-time access, ePresentment, printing and delivery in numerous formats across multiple channels.</p> <p>Effective Feb. 1, 2010, Xenos became an Actuate company. For more information, visit <a href="http://www.xenos.com">www.xenos.com</a>. <b>Website: <a href="http://www.xenos.com">www.xenos.com</a></b></p>







Smart People. Smarter Solutions.

visit the IMC booth for more information  
about our Enterprise Content Management  
solutions



The Leading Experts for Enterprise Content Management (ECM) Solutions

you are invited to attend our presentation during the break-out session

“Real World Case Management Across the Enterprise:

One Platform – Many Applications”

---

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

11480 Commerce Park Drive • Reston, VA 20191 • 703 871-8700

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

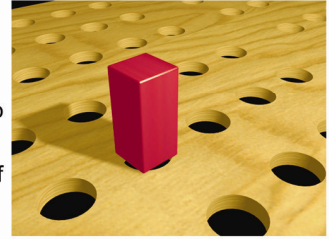


## Upgrading IBM FileNet P8 3.x to IBM FileNet P8 4.5

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-built 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

Washington, DC ECM UserNet

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

### Softech Value Add Offerings

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

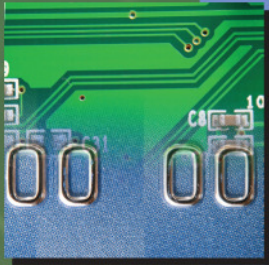
[www.softechis.com](http://www.softechis.com)

Softech & Associates, Inc.

877-638-3241



**PROUD PLATINUM SPONSOR FOR THE  
IBM REGIONAL USERNETS**



## 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 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)

---

### **Jeskell Breakout Session:**

Come and learn why the CA Department of Public Health chose OpenWorkdesk over Workplace and XT.

---