



EMC Builds an Information Solution for Transactional Content Management

Analyst: Anne MacFarland

Management Summary

Because we see so much digitization around us, we sometimes assume that routine processes and the workflows that support them must, by now, be easy. Often the opposite is true. Technology greatly assists workflows – but the snags, when they develop, affect more linked-together parts. Because of the rapid pace of business, such snags are noticeable, and at odds with the expectations of today’s customers. **The key to greater workflow efficiency involves reducing the number of exceptions that require special handling.** Transaction processing has gone from *something you do* to *something you orchestrate* in a way that can satisfy the exceptional situations without stanching the larger process flow.

This is not easy, for many business transactions, by their nature, are complex. Group projects where buy-in must be explicit and evaluations that involve factors not easily quantified provide many examples of transactional workflows where technology assists humans, and not the other way around. Such steps may be routine, but cannot be automatic.

To speed such processes, evoking relevant information must be easy. This information often come in both structured and unstructured forms, and often includes annotations and other paper-based information sources that must be captured and classified. As an example, if insurance claims are to be settled as rapidly as the market demands, claims processors must have a wide variety of information – and it must all be coordinated for presentation through a workflow backed by some kind of a real or virtual repository. These kinds of transactions are business processes that make or break a business reputation.

Information technology has supported such extended transactions at a high volume have been around for decades in industries like financial services, insurance, government and health care. Many of their presentation layers were custom crafted to how work was done at the time they were created. The demands of adding more features to the process, driving out paper, and providing more consistency across related processes to satisfy increasing regulatory requirements have pushed many organizations towards using commercial products – if they can get the functional richness they need and some way to differentiate themselves from their competitors.

EMC Documentum has developed a solution targeted at the inefficiencies of transactional content processing. It has templates for particular industries, and simple, per user pricing. However, the star of the show (and a part that will matter to those who use it) is its new, purpose-designed user interface. The solution’s supporting cast can include a wide range of EMC products – but Documentum also has a rich heritage of support for products from many vendors. **This new EMC information solution functions as an information appliance that optimizes workers’ use of information in transaction processes.** For more details, please read on.

IN THIS ISSUE

➤ The Transactional Content Management (TCM) Solution as an information solution.....	2
➤ Conclusion	3

The Transactional Content Management (TCM) Solution as an Information Solution

Classical process optimization focuses on streamlining, often by architecting away bottlenecks with various kinds of accelerators and parallelization. The result is a process that has little tolerance for exceptions and is usually narrow in scope. In information solutions, it is the *completeness of information*, and its *effective use* that add a differentiation that competitive businesses need. By their nature, information solutions tend to be modular and service-oriented.

In transaction processing systems, there are two challenges. Data needs to get into the system. This often involves scanning paper like forms, some elements of which may be handwritten. Data capture is far more than a matter of scan and optical character recognition (OCR). It includes determination of metadata requirements, automatic classification, and a validation step to make sure that the metadata is tagged accurately. It can include enhancements – from image enhancements to improve readability, to an orchestration of the capture process designed to get quick usability for a new project by focusing on what is needed first.

Then the data must be presented as needed in the process flow. *EMC Documentum* provides enterprise content management. This is more than the simple presentation of records management or archiving. Documentum's *Business Process Management* software adds the workflow modeling and orchestration to make the solution match business processes as they are, and evolve them as is needed in the future. Finally, of course, transaction information must be entered into a system of record, such as *SAP*, and presented to other applications and portals for post-transaction analysis and use.

EMC's *Documentum* and *Captiva* solutions share a common document model. They have the bi-directional communication needed to allow Documentum's orchestrator to manage the process flow so that a customer's specific business practices are enforced.

EMC can supply, as an option, many capabilities as services to be used as needed. (See box on next page.) This *a la carte* approach allows the EMC solution to both meet present needs and evolve with the business. More richness in functionality of data capture and

workflow can be added as needed. Replication and data protection options can add resilience to the information solution, and infrastructure virtualization can be used to add the performance characteristics your organization may need.

For proper optimization, you need address all three domains of *physical infrastructure*, *information sources*, and *applications*. As they are co-located in an environment as cooperative services, components can be swapped in and out as needs evolve. EMC will support all of its components, both as products and as an aggregate solution. For many enterprises, this is a significant benefit.

But there is more...

This solution features a brand new *TaskSpace* GUI designed particularly for the task of managing transactional content and processes. The templates that come with the GUI allow business process owners to customize the template for their specific processes and their business requirements. No IT developers are needed – it is done by the business analysts who know how they want things to look. TaskSpace includes *Queue Management* and part of the Documentum Process Suite, which includes *Business Activity Monitoring (BAM)* software. BAM allows all stakeholders know how the processes are going.

The TaskSpace GUI can be published to an existing portal using Documentum's web development kit (WDK). This allows the solution to be embedded in an existing application. TaskSpace allows end-users to retrieve documents from a variety of sources to support their task. For transaction environments like call centers, this more generous approach is a lot more effective than working from a limited set of scripts.

How to Buy

This solution is targeted at enterprise with substantial human-assisted transaction processing. Initially, it will be targeted at Documentum's installed base in financial services, insurance, health care, and government. It will also be of interest to other industries, and businesses with intense transactional informational needs, such as invoice processing. EMC has priced this solution on a per user basis, and made its pricing competitive with other solutions in the market. Bundles will be available for large deployments.

A La Carte Options in EMC's Information Solution

All of these elements may be leveraged as part of the solution.

EMC Software

Capture-Manage-Store

EMC Captiva

- **InputAccel** - fully customized document capture solution.
- **Dispatcher** – intelligent document recognition and classification
- **eInput** – distributed capture capabilities

EMC Documentum

- **Enterprise Content Management** (ECM) repository with check-in, check-out, versioning, security.
- **BPM** - Workflow engine with complete process lifecycle management
- **eRoom** - Collaborative work environment which extends beyond the enterprise.
- **Records Management** – control the entire lifecycle of corporate records including physical paper.

EMC Hardware (NAS, SAN, CAS)

Protect

- **Array Replication** – these processes are initiated by the array to provide a secondary copy of data.
 - **SRDF, Mirror View**, etc.
- **Disk-to-Disk Backup** – Backup replicates data in a way that, should hardware fail, can be quickly restored to a new environment.
 - **EMC NetWorker**
- **Continuous Data Protection** – captures and time-stamps data so that *oops* deletions and corruptions can be resolved by rolling back the clock.
 - **EMC RecoverPoint**
- **Security** – Security must be pervasive.
 - **RSA** brings security to the solution as a whole.
 - **EMC Information Rights Management** gives it to information assets.

Optimize

- **Infrastructure Virtualization** – lets resources be used opportunistically and eases management.
 - **VMWare** for applications, **EMC Rainfinity** for networks, and **EMC Invista** for storage
- **Information Optimization** gives similar features to information assets.
 - **Replistor, InfoScope, Documentum**
- **Resource Management** – Uses modeling to manage complex interactions.
 - **EMC Control Center, SMARTS, nLayers**

Source: EMC

Conclusion

Technology, properly used, can empower workers in marvelous ways. However, to be effective, the solutions have to be well thought out, and supportive of organizational roles, not just the immediate needs of process. In this Documentum solution, EMC has sought to engage and satisfy all contributors to the transaction process. If you have been short-changing your transactional information environments, and paying the price in customer and employee

churn, take the opportunity to check out what EMC brings to the table. Their comprehensive approach might be just what you are seeking.



About The Clipper Group, Inc.

The Clipper Group, Inc., is an independent consulting firm specializing in acquisition decisions and strategic advice regarding complex, enterprise-class information technologies. Our team of industry professionals averages more than 25 years of real-world experience. A team of staff consultants augments our capabilities, with significant experience across a broad spectrum of applications and environments.

- ***The Clipper Group can be reached at 781-235-0085 and found on the web at www.clipper.com.***

About the Author

Anne MacFarland is Director of Data Strategies and Information Solutions for The Clipper Group. Ms. MacFarland specializes in strategic business solutions offered by enterprise systems, software, and storage vendors, in trends in enterprise systems and networks, and in explaining these trends and the underlying technologies in simple business terms. She joined The Clipper Group after a long career in library systems, business archives, consulting, research, and freelance writing. Ms. MacFarland earned a Bachelor of Arts degree from Cornell University, where she was a College Scholar, and a Masters of Library Science from Southern Connecticut State University.

- ***Reach Anne MacFarland via e-mail at Anne.MacFarland@clipper.com or at 781-235-0085 Ext. 128. (Please dial “128” when you hear the automated attendant.)***

Regarding Trademarks and Service Marks

The Clipper Group Navigator, The Clipper Group Explorer, The Clipper Group Observer, The Clipper Group Captain's Log, The Clipper Group Voyager, Clipper Notes, and “*clipper.com*” are trademarks of The Clipper Group, Inc., and the clipper ship drawings, “*Navigating Information Technology Horizons*”, and “*teraproductivity*” are service marks of The Clipper Group, Inc. The Clipper Group, Inc., reserves all rights regarding its trademarks and service marks. All other trademarks, etc., belong to their respective owners.

Disclosure

Officers and/or employees of The Clipper Group may own as individuals, directly or indirectly, shares in one or more companies discussed in this bulletin. Company policy prohibits any officer or employee from holding more than one percent of the outstanding shares of any company covered by The Clipper Group. The Clipper Group, Inc., has no such equity holdings.

Regarding the Information in this Issue

The Clipper Group believes the information included in this report to be accurate. Data has been received from a variety of sources, which we believe to be reliable, including manufacturers, distributors, or users of the products discussed herein. The Clipper Group, Inc., cannot be held responsible for any consequential damages resulting from the application of information or opinions contained in this report.