FileNet and SharePoint
Better Together

Tom Moen
Channel Development Manager
Agenda

- Introductions
- Who is FileNet
- Why FileNet
- ECM
  - Content
  - Process
  - Connectivity
- SharePoint Integration
FileNet

- $500 million
- 2000 employees
- 23 year old
- Customer successes
  - Government
  - Insurance
  - Financial Services
  - Manufacturing and Utilities
  - Compliance
Government Customers

- U.S. Federal Agencies
  - Installed in 140
- State & Local
  - Installed in 418
- International
  - Installed in 294

15% of Revenues

Key applications
- Justice
- Revenue/Tax
- Health/Welfare
- Transportation
- Higher Education
- Homeland Security

% of Revenue as of Dec 31, 2004
Insurance Customers

- 62 companies = 94% IT spend
- Installed in 48 of these companies
- 21 of top 25 Insurance companies

Key applications
- Claims
- Policyholder Service
- Membership Service

28% of Revenues as of December 31, 2004
Manufacturing Customers

- More than 600 customers
- Broadly installed in blue chip accounts
- Very large installs touching many, many users.

Key applications
- Lifecycle Asset Management
- Compliance
- Vendor Management
- Energy Trading
- eForms

11% of Revenues

% of Revenue as of Dec 31, 2004
Financial Services

- FileNet has over 1,700 financial services customers that are top-tier institutions within their given market segment.
  - 7 of the top 10 US Banks
  - 24 of the top 25 World Banks
  - 10 of the top 20 US Mortgage Servicers
  - 12 of the top 20 US Credit Card Issuers
  - 38 of the top 50 US Insurance Companies
  - 7 of the top 10 Diversified Financial Firms

% of Revenue as of Dec 31, 2004
Customers Want

- Fewer vendors
- Proof before buying – risk adverse
- Quick results – rapid ROI
- Complete solution
- More - for less
- True partners
- Trustworthy vendors or “trusted advisors”
- Accountability for project success and SLAs
Realize the Value of Enterprise Content Management

"The value of integrated content, processes and connectivity cannot be underestimated in enabling companies to respond to changing market conditions, leverage windows of opportunity, minimize competitive threats and improve return on investment."

-Mark Gilbert

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Let’s Look at One Example… ZeroClick for Email Capture

Business User

Read

Send

Automatic Pull

Exchange or Notes Email Server

Inbound

Outbound

Email and Attachments

Monitor and Pull Copy of Message

Triggers Rules, Events and Meta Data

ZeroClick Event

Delete Copy

FileNet Email Capture

FileNet Records Manager

Do you have an email records problem?

Organizations are aggressively adopting email for highly sensitive and valuable business processes and transactions.

93% answer inquiries.

84% discuss business strategy.

71% negotiate contracts.

69% exchange invoices, payment info.

44% to file with official bodies.
Enterprise Content Management Process

Auditable
Consistency and Control
Automate, Streamline and Optimize
Simulate and Analyze
Handle Exceptions
Activate Content

FileNet ECM Platform

Web Content Review & Approval
Accounts Payable
Customer Service
Human Resources
Regulatory Compliance
Contract Review

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FileNet
Loan Origination Case Study

Business Requirements
- Eliminate Paper in Mortgage Processes
- Paperless underwriting
- Content access for loan servicing
- Become “audit proof”
- Reduce turn times and “touches” per loan

- Top 10 lender
  - $42 billion in mortgages closed in 2002
  - $6 billion closed in 1997
  - $35 billion mortgage servicing portfolio
- 68,000 fax pages captured, processed, and routed per day
- Over 100 million images (pages) managed
- Streamlined underwriting
- Third-party access to content & process

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Loan Origination – before ECM

- **RED** – Requires human intervention
- **YELLOW** – Process latency
- **BLUE** – Semi-automated activity
- **GREEN** – Fully automated activity
Loan origination – after ECM solution

Results

- Underwriting process
  - 7 days to 48 hours
- Processing costs
  - $250 to $60/loan
- Lost Documents
  - Many to ZERO
- Document transfers to investors
  - Difficult to effortless
- Human interaction
  - tons to NEAR STP

- 76% cost savings
- 400% Growth since ECM (Saved 800 New Hires)
- All parties, including clients, now have immediate access to information and are part of the solution
Enterprise Content Management Connectivity

People to People

Systems to People

Systems to Systems

ERP

CRM

Data Warehouse

Legacy Applications

Employees

Customers

Suppliers

Partners

Email

Other Content Sources

3rd Party Applications
How Would You Benefit?

- The most relevant, up-to-date content was immediately available?
- Process steps were automated or executed by the right people at the right time?
- The right systems are transparently connected and updated?

You can make better decisions faster!
ECM Critical Success Factors

ECM is Content, Process and Connectivity
End-to-end ECM with SharePoint

Focus is on keeping you in MSFT environment, having P8 backfill SharePoint lack of true ECM capabilities

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**Five Key Areas Of Interoperability**

1. Unified Search
2. Portal Integration
3. Content Metadata Integration
4. Business Process Integration
5. Integration w/ Office Collaboration Tools

Starting Point For Most Solns

Bi-directional Content & Process Integration
FileNet / SharePoint Technology Overview

- Integration is bundled and seamless
- Technology is provided by modules, each with their own specific capabilities.

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SharePoint Connectivity Is Part of Larger Content Federation Services Capabilities

- Call Center Operations
- Customer Self-Service
- Agent Portals
- Broker/Dealer Operations
- Claims Processing
- Other Processes

FileNet P8 Enterprise Catalog Services

FileNet P8 Content Federation Services

- FileNet P8 Image Service Repositories
- FileNet P8 Content Repositories
- Panagon® Content Services
- SharePoint and other Content Management Repositories

SharePoint Connectivity Is Part of Larger Content Federation Services Capabilities
Protocol Handler: Unified Search

- **Schedule index synchronization between SharePoint and FileNet P8**
  - Extends the native indexing capability of SharePoint Portal Server to FileNet repositories
  - Saves time and increases accuracy for searches performed across multiple repositories
  - Single search from SharePoint Portal UI across multiple document stores, including FileNet
  - Supports free text and metadata
  - Administrators can control what FileNet P8 content is made available
Protocol Handler: Key Benefits

- Integrates FileNet content, metadata and security into the SPS environment, supporting consolidated indexing and search
- Periodically crawls FileNet repositories for new and/or changed content for addition to the index
  - Full and incremental crawling supported
- Users quickly locate content with a single-field search combining full-text and/or content attribute metadata, such as keywords, author, or content type
- Standard Microsoft Search technology used to enable consolidated search across both SharePoint and FileNet repositories
Protocol Handler for FileNet at Work

Documents and Folders Indexed and Retrieved from the FileNet Repository

Search Results

34 results returned, showing items 1 - 34, sorted by Relevance, grouped by Site.

phoenix

Vorsite%20Subject%20Matter%20Experts

Actions

Show Less
Expand Groups
Add to My Links
Alert Me
Advanced Search

Cougars are wild

Cougar Datasheet

See 6 more results from site phoenix
Office Integration

Check in and out as well as retrieved directly from the research pane in Office
Addition Integration

- Ad-hoc Search and Document Check-in/Check-out
- SharePoint Portal Server serves as Portal for MSFT-centric departmental use
  - FileNet provides the backend Enterprise Content Management System
    - Administrators can control what P8 content is made available
  - Compatible with both FileNet CS and CM
  - Multiple Web Parts available
    - Can be further customized through PS
Web Parts: Key Features

- Provides windows into various components of the FileNet repository
- Users can check content into FileNet directly from the portal
- Maintains the native SharePoint look and feel
- Administrator can configure the Web Parts to expose various views of the FileNet repository
- Uses Web Services to communicate directly to the FileNet APIs
Web Parts for FileNet Provide Web-Based Access to Different Components of the FileNet System

Security Is Maintained
Transfer Agent: Invisible Desktop Integration

- Seamless desktop integration of SharePoint Services and FileNet P8
  - SharePoint Becomes Alternate Contribution Mechanism to FileNet
  - Seamless Movement of Documents and Metadata
- Content Managers Continue to Use SharePoint as the Collaboration Tool
- Highly Customizable and Configurable
  - Can be configured to automatically mine content, or move content based on user request
  - Supports File Archive, File Purge, Complex Work Flows etc.
Transfer Agent: Key Benefits

- **Documents and associated metadata** move seamlessly from SharePoint Server to FileNet repository when they reach a certain workflow state.

- Content managers can continue to use SharePoint to manage and collaborate on documents, while **participating** in the FileNet Enterprise Document Management System.

- Can meet **compliance requirements** through FileNet Content Server, while using Microsoft Office Tools to create and manage content.

- Content moved from WSS to FileNet P8 retains all FileNet **Active Content capabilities**.
Transfer Agent at Work

Content Author Creates and Submits Document Through SharePoint

Content Author sends document to FileNet when it is ready for enterprise publication
FileNet Advantage

- A single integrated product family made stronger with SharePoint
- A flexible, scalable and open framework
- Easy to deploy
- Easy to use
- Rapid payback
- Lower total cost of ownership
- All from a single global supplier serving customers in 90 countries
THANK YOU