

# IBM Software Demos

## DB2 Document Manager

### **DB2 Document Manager Demonstration Script**

#### **1a 00**

Knowledge workers in all industries are continually creating, approving, saving and accessing documents of many types in the context of the company's business rules and practices. In this demonstration we will see how an auto insurance claims advisor named Chris, uses IBM DB2 Document Manager to simplify this process and enhance effectiveness.

#### **1b 0:28**

[Here](#), Chris is working on a report regarding injuries in speed related accidents. Chris needs to include a chart that displays the findings of a national research company. Without leaving Microsoft word, Chris searches the corporate repository for the needed chart.

#### **1c 0:53**

When the chart is located, a single click of the mouse will link it into the report.

#### **1d 1:05**

In addition to linking the chart, Chris also updates the title and effective date of the report in the corporate repository.

#### **1e 1:13**

IBM DB2 Document Manager provides rich integration with Microsoft Word, by recording the fact that the chart is now part of Chris' report, tracking the title and date change and seeing that this information is stored in the corporate repository.

#### **2a 1:29**

Another example of Document Manager's integration with familiar desktop products is seen here as Chris retrieves the document's "lifecycle" to see who will need to approve the report when his work is done.

#### **2b 1:45**

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Chris sees that the document will next be sent on to Mandy, his manager, as well as Larry, the company's legal council for review and approval.

### 2c 1:58

The audit trail of activity is also available which records user's request to view, print, checkout, and modify the document; as well as many other activities.

### 3a 2:12

Completing his work Chris simply closes the document. Document Manager now continues to enhance the information that “surrounds” the document by checking the document back into the repository and updating the information about the report to reflect Chris' changes.

### 3b 2:39

Chris will now use the Document Manager desktop, a simple web interface to the corporate repository, to approve and submit his task which will send the report to Mandy and Larry. Document Manager will now notify Mandy and Larry of their task through an email or even a Sametime instant message. This notification can include a link to the report or the report can be placed in a work folder for their access.

### <Part 2>

#### 4a

Chris's manager, Mandy, now logs in to Document Manager. When she does, we can see that the desktop has changed to reflect her position as manager.

#### 4b

Additional tools have been added to the bottom left of the screen and a Sametime messaging window is available just above the tools. This dynamic update of the desktop enables customized interfaces for specific users or entire groups.

#### 4c

Mandy now locates the report by opening her "Reports Needing Approval" folder.

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### 4d

She selects the document and begins to review it. She also has the options to add annotations or suggest changes.

### 4e

Finding the document to her satisfaction, Mandy closes it and then selects to approve.

### 4f

The system will notify her that it has recorded her approval and is now waiting for additional reviewers before finalizing the process.

### <Part3>

### 5a.

As the final step in the process, Larry, the corporate counsel, logs in to Document Manager. As with Mandy, Larry's desktop has dynamically changed to reflect his requirements and corporate function.

### 5b

Larry opens this folder and finds the document. Like Mandy, Larry can view the document; but in this case decides to review the document's lifecycle.

### 5c

He can see that Chris has completed his work and that Mandy has viewed it and approved it, so he is going to approve it as well, but he will first add a comment.

### 5d

By selecting the "Add Comment" button, Larry is able to quickly add a note regarding this report. When he completes his comment, Larry approves the report and the system notifies him that his approval has been recorded and the document has been transitioned to the next step in the lifecycle.

### 5e

Once the report is approved, Document Manager can automatically create a single Adobe PDF which can be automatically sent to a claimant or published to a web site or other location.

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#### 5f

In addition, establishing the process for this report and configuring the system was performed using a point-and-click Designer tool that requires no programming and results in quick responses to your business requirements.

This demonstration has shown only a few of the available features in IBM DB2 Document Manager, which provides a wide range of benefits for your document management and government compliance needs.