IBM Content Manager for iSeries V5R1 Provides Best-of-Breed Content Management and Workflow Technology

Overview

IBM Content Manager for iSeries V5.1 (previously known as IBM EDMSuite™ ImagePlus® for AS/400®) provides best-of-breed document imaging and workflow technology designed to replace cumbersome paper document processing with image processing to achieve greater productivity and process reliability. With Advanced Workflow, Content Manager provides a fast, efficient way to customize and automate business processes by automatically routing documents and folders through a business.

Together, Content Manager and the IBM @server iSeries server empower users throughout and beyond your organization, providing immediate access to business content and automating your business processes, maximizing productivity enterprise-wide.

What’s New in Content Manager for iSeries V5.1

- New variables that enhance Decision Points
- Enhanced Collection Point information
- Improved suspend or pend options
- Ownership of work packages
- Client enhancements.
  These include:
  - A new, familiar, Explorer-like interface
  - Usability improvements
  - Basic Search enhancements
- Improved content organization via enhanced foldering.
- Capture, audit, and storage management usability improvements.
- Support for Content Manager CommonStore for SAP, allowing SAP R/3 customers to archive aging business data to maintain high performance levels. Alternately, inbound or outbound business documents may also be captured and accessed directly from the SAP desktop or Inbox as needed.

Key Prerequisites

- OS/400® Operating System V5R1 (5722-SS1)
- Windows 98, Windows NT™, Windows™ 2000, or Windows Millennium for the Content Manager for iSeries Client

At a Glance

IBM Content Manager for iSeries V5R1 incorporates best-of-breed content management technologies with the well-recognized benefits of the iSeries server to efficiently capture, process, and manage key information.

As an advanced document imaging and workflow system, Content Manager V5R1 provides robust document imaging and enables delivery of critical work to the right personnel.

What’s new in IBM Content Manager for iSeries V5R1:

- Enhanced Content Manager Advanced Workflow
- New multiple Windows Client and foldering options
- Web access via standard browsers
- Multiple capture, audit, and storage management usability improvements
- Archive capabilities for SAP R/3 via support for Content Manager CommonStore for SAP

Planned Availability Dates

- May 25, 2001, for Build-to-Order fulfilled by SDF
- June 15, 2001, for Build-to-Plan fulfilled by Lotus®

This announcement is provided for your information only. For additional information, contact your IBM representative, call 800-IBM-4YOU, or visit the IBM home page at: http://www.ibm.com.
IBM Content Manager for iSeries V5R1 (previously known as EDMSuite ImagePlus VisualInfo™ for AS/400) is a client/server software product designed to replace paper document processing with image processing for greater efficiency, reliability, and security. Content Manager for iSeries is IBM’s document imaging and work management system for the iSeries and a strategic member of the IBM Content Manager portfolio of products. Content Manager can serve the needs of a small departmental application or act as an enterprise solution for a large corporation. Even in geographically dispersed enterprises, mission-critical information can be delivered to users when they need it, providing rapid response for employees and customers alike.

Content Manager controls the capture, indexing, storage, and retrieval of documents or facsimiles as digitized images. Documents are initially stored on iSeries DASD and can be automatically migrated to an optical storage system. System-managed storage enables users to balance retrieval performance and storage costs with minimal staff intervention. Content Manager for iSeries also provides both advanced and ad-hoc workflow functions, allowing business processes to be automated, with a simple graphical builder tool designed to implement advanced workflow quickly.

“Out of the box” GUI clients are provided so users can retrieve and work with items stored in Content Manager with ease. Application programming interfaces also allow customers to integrate or develop customized document management solutions to content-enable line of business applications seamlessly. Content Manager’s advanced capabilities help iSeries customers worldwide automate and gain control of the information that the enterprise receives, creates, and processes.

The separately available Content Manager ImagePlus Workstation Program V2.3 (CM IWPM) is an alternate GUI client application that is still supported for existing customers who have migrated to the Content Manager for iSeries application with previously existing Workfolder Application Facility (WAF) environments.

Enhancements delivered in Content Manager V5R1 include the following:

### Content Manager for Windows Client Enhancements

- **Table of Contents enhancements:**
  - A new Windows Explorer-like interface for workbaskets, search results, and folders. This provides a familiar interface for Windows users, allowing users to “drill down” into folders without opening new windows.
  - A view of the total search count and number selected.
  - Additions to the Actions menu, which now includes Selected and Processed menus.
  - New context (pop-up) menus.
  - The client application now supports a Drag and Drop interface, providing a more natural interface for moving documents from folder to folder or workbasket to workbasket.

- **New process dialogs which include:**
  - A Change Owner dialog window is provided to allow you to change the ownership of selected work packages.

### Additional Content Manager Windows client enhancements include:

- You can request the Index and Notelog dialogs when documents are opened.
- Index dialogs remember previous size and position.
- The Import dialog stays open until it is explicitly closed.
- The table of contents is refreshed whenever an item has been re-indexed.
- New enhanced OLE APIs and print-related functions are provided with this release.
- New “attribute value list” user exits allow an administrator to extend the Edit Index dialog box to include the combo-box (drop-down list) controls. These exits can be implemented to simplify the indexing process by listing only the valid values for a given key field.
- Users can now select a specific set of workbaskets for which they want to see item counts. This is useful for customers who have large numbers of workbaskets and need to know how many items are in some workbaskets, but do not want to pay the performance price to get item counts for all workbaskets.
- The Basic Search dialog now remembers the last index class that was used for a search. This feature allows users to make simple searches over the same index class.
- A new retrieve menu and action list for object staging is provided to allow items to be staged to disk from tape or other storage media.
- A new Storage Location indicator is provided at the document level to indicate where it is staged: on the object servers disk, tape, or CD. This status is visible as an optional column in the table of contents. This is accessible from the layout menu and dialog. When configured properly, users can see this indicator, so they can anticipate retrieval times, based in storage location.
- You can install multiple language versions of the client. At run time you may select the language you want to use.

### Capture, Audit and Storage Management Usability Improvements

- **Import** — On the iSeries server, objects can be imported into Content Manager and indexed.
- **Object Staging** — You can selectively retrieve items from secondary storage to DASD.
- **Storage Location Indicator** — The storage location indicator can be selected as a system attribute.
Improved Foldering Options

Recursive Auto-foldering — Content Manager server offers recursive Auto-foldering, while supporting a single level of indexing.

Multiple Content Manager Advanced Workflow Feature Enhancements

Workflow Decision Point — Content Manager for iSeries will support the following workflow variables: system, user-defined, library, and external application variables.
- Workflow Library Variables — The library variables are read-only and are not explicitly maintained within the work package variable file.
- Workflow Collection Point — Users can obtain collection point criteria during run-time.
- Workflow Multiple Suspend Criteria — Multiple suspend requests can be specified for an item.
- Workflow Work Ownership — This will ensure that the same user works a work package to completion even though the work package goes to many workbaskets.
- Workflow History — Users can log and view workflow history. Process and work package activity will also be logged.
- Workflow Variable Workbasket — The WORK command has been modified to allow a variable to be specified as the workbasket parameter, providing flexibility in route definitions in that the workbasket the work package will flow through do not have to be predefined.
- Workflow Set Variable — Is added to the Workflow menu within the client application. When selected, this option will allow users to set the value of a work package variable.

Content Manager Advanced Workflow Feature

Content Manager for iSeries Advanced Workflow provides a fast, efficient way to customize and automate business processes. Advanced workflow includes functions for building a work process, and for routing documents and folders through a business automatically. The Advanced Workflow feature of Content Manager provides a versatile, easy-to-use graphical Workflow Builder tool where professionals can define and optimize the work process of a group, department, or enterprise. A user can drag and drop graphical icons to construct a comprehensive, easy-to-understand process diagram.

All of these functions are defined graphically. No code needs to be written to create or modify the diagrams and there is no need to learn a programming language. Over 300 APIs are provided.

The routing aspects of workflow can be handled in several ways, depending on business needs. Routing can be sequential, conditional, parallel, or ad hoc.
- Sequential routing allows one person to work on a document or folder at a time.
- Conditional routing moves the document or folder to specified workbaskets when a predetermined condition is reached, such as a mortgage loan ceiling that requires audit review.
- Parallel routing allows different departments to work simultaneously; the work waits for all groups to finish before proceeding.
- Ad-hoc routing allows users to manually move documents or folders to other users.

With advanced workflow, you can identify elements and decisions that are critical to a business, along with complex relationships and outcomes. As a result, users can implement policies and procedures consistently, resulting in increased productivity, enhanced quality, and improvement in the way an organization does business.

Access and Security

Content Manager for iSeries provides flexibility for controlling access to index classes (types of documents), workbaskets, and advanced workflow processes. By using access lists, the Content Manager for iSeries administrator can control by user or by group all levels of access to these resources. For example, only certain people would be allowed to read documents stored in the “Employee Data” index class and even fewer would be allowed to store into this index class.

Application Development and Integration

The Content Manager for iSeries API set, Server Exits, and Workstation APIs provide integration capabilities by supporting processes that send and/or receive, update, or validate that correct information has been passed from the client or another application using Content Manager for iSeries. This toolkit provides the flexibility to validate index data, gather workflow variable data, or launch viewing of a specific document from a business application.

Content Manager eClient

Also generally available separately, effective March 30, 2001, is the new Content Manager eClient.

The Content Manager eClient allows users to view multiple documents and their associated annotations simultaneously, with options to print, fax, or e-mail documents. The Content Manager eClient enables viewing of a broad range of documents formats, without plug-ins, including multiple image formats (TIFF, MO:DCA, JPEG and GIF), printed reports in AFP™ and line data formats, and many additional office document formats, through the use of integrated, server-based transforms. Other content can be viewed through a standard Multipurpose Internet Mail Extensions (MIME) launch.

The IBM Content Manager eClient is packaged with both the IBM Enterprise Information Portal (EIP) and the EIP Client Kit for Content Manager, where search technologies, content repository connectors, Java™ Server Pages (JSP), and server-based transforms are provided.

Accessibility by People with Disabilities

The following features support use by people with disabilities:
- Operation by keyboard alone
- Optional font enlargement and high-contrast display settings
- Screen readers and screen magnifiers tested for use by people with visual impairment
- Speech recognition products tested for use by people with mobility impairment
- Optional display of audio alerts for people with hearing impairment
This program is EuroReady.

For more information on the implications of the euro, visit the IBM euro Web site at:

http://www.ibm.com/euro

**EuroReady Products:** IBM considers an IBM product to be EuroReady if the product, when used in accordance with its associated documentation, is capable of correctly processing monetary data in the euro denomination and of respecting the euro currency formatting conventions (including the euro sign). This assumes that all other products (for example, hardware, software, and firmware) that are used with this product are also EuroReady. IBM hardware products that are EuroReady may or may not have an engraved euro sign key on their keyboards.

Currently, EuroReady status applies primarily to IBM products specific to the EMU countries. Products that are not specific to these countries are deemed to be “not ready” for euro unless otherwise stated in the product’s country-specific specifications.

**IBM Hardware Ready:** IBM supplies certain IBM products that include third-party software (preloaded or not) and/or third-party attached hardware. In these instances, IBM is not in a position to assert that these third-party products are, in themselves, EuroReady.

Therefore, such IBM products will be designated as Hardware ready.

**EuroReady Solutions:** IBM considers a solution to be EuroReady when the solution providers have:

- Analyzed the euro requirements, including the need to comply with relevant EC rules
- Built in appropriate function

and can clearly demonstrate this by:

- Detailing euro related requirements
- Describing how these will be implemented in the solution
- Declaring when the implementation will be generally available

The euro capabilities of a EuroReady solution will be clearly identified as features of the solution specification, as described in the contracts document.

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Offering Information
Product information will be available on day of announcement through Offering Information (OITOOL) at:

http://www.ibm.com/wwoi

Publications
The following publications can be ordered after planned availability. To order, contact your IBM representative.

<table>
<thead>
<tr>
<th>Title</th>
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<tbody>
<tr>
<td>Content Manager for iSeries</td>
<td></td>
</tr>
<tr>
<td>Getting Started with Client for Windows™</td>
<td>GC27-1135</td>
</tr>
<tr>
<td>Planning and Installing</td>
<td>SC27-1133</td>
</tr>
<tr>
<td>System Administration Guide</td>
<td>SC27-1136</td>
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<td>Messages and Codes</td>
<td>SC27-1137</td>
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<tr>
<td>Understanding Advanced Workflow</td>
<td>SC27-1138</td>
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<td>Application Programming Guide and Reference</td>
<td>SC27-1139</td>
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The IBM Publications Center Portal is located at:

http://www.ibm.com/shop/publications/order

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Note that PNS subscribers most often order their publications via the Publication Center.

Displayable Softcopy Publications
IBM Content Manager for iSeries V5R1 publications are offered in displayable softcopy form. All unlicensed manuals are included. The displayable manuals are part of the basic machine-readable material. The files are shipped on the same media type as the basic machine-readable material.

These displayable manuals can be used with the BookManager® READ licensed programs in any of the supported environments. Terms and conditions for use of the machine-readable files are shipped with the files.

Technical Information
Specified Operating Environment

Hardware Requirements

Content Manager for iSeries Server
- Any iSeries processor capable of running OS/400® V5R1
- CD-ROM drive

Content Manager for iSeries Client
- PC capable of running Windows 98, Windows NT™, Windows 2000, or Windows Me
- Intel Pentium™ or equivalent — 200 MHz minimum, 266 MHz recommended
- 160 MB fixed disk space
- Network adapter (if components are installed on multiple workstations)
- Minimum of 64 MB RAM, 128 MB recommended
- CD-ROM reader (installation only)
- VGA (800 x 600 minimum, 1280 x 1024 recommended; 256 colors minimum)
- ASPI-compliant SCSI adapter (for scanning only)
- Mouse

Advanced Workflow
- PC capable of running Windows 98, Windows NT, Windows 2000, or Windows Me
- Minimum 200 MHz PC, recommended 266 MHz PC
- LAN adapter
- Minimum of 64 MB RAM, 128 MB recommended
- CD-ROM drive (for installation only)
- 50-75 MB fixed disk depending on components chosen
- 20 MB fixed disk Toolkit only
- VGA — 800 x 600 minimum, 1280 x 1024 recommended; 256 colors minimum
- Mouse

Software Requirements
Content Manager for iSeries Operating System
- OS/400 V5R1
Content Manager for iSeries Client

• One of the following: Windows 98, Windows NT, Windows 2000, or Windows Me
• TCP/IP or APPC (CPI-C Level 1.2 support using Client Access, PCOMM, or an equivalent product)

Advanced Workflow

• Windows NT 4.0, Windows 2000, or Windows Me with Communications support
• Content Manager for iSeries Client for Windows
• Microsoft Internet Explorer Version 4.0 or higher, or Netscape Version 4.0 or higher
• Adobe Acrobat Reader
• TCP/IP or APPC (CPI-C Level 1.2 support using Client Access, PCOMM, or an equivalent product)

Compatibility: IBM Content Manager for iSeries V5R1 and its Workflow Application Facility (WAF) feature provide different interfaces to the same document management system. Users of WAF Version 4.1 need to obtain code that will enable WAF for IBM Content Manager for iSeries V5R1. This code is available on the IBM Image Web site at:

http://www.ibm.com/software/data/cm/news.html

The Content Manager for iSeries interface and WAF interface can be used together, with limitations. Customers who plan to use both image interfaces to access the same Content Manager for iSeries system should refer to the planning and installation guides and the system administration guides for Content Manager for iSeries and for WAF. Coexistence issues, considerations, and limitations are discussed in these documents.

Planning Information

Direct Customer Support: Direct customer support is provided by IBM Operational Support Services — Support Line. This fee service enhances customers’ productivity by providing voice and electronic access into the IBM support organization. IBM Operational Support Services — Support Line will help answer questions pertaining to usage and suspected software defects for eligible products.

Direct customer support is also provided by Content Manager Support Line. This fee service enhances customers’ productivity by providing voice and electronic access into the IBM support organization. AS/400 Support Line will help answer questions pertaining to usage, “how to,” and suspected software defects for eligible products.

Installation and technical support is provided by Global Services. For more information on services supporting this product, call 800-IBM-4YOU (426-4968).

Packaging: For the base product IBM Content Manager for iSeries V5R1 you will receive three CDs containing the server programs. The following entitled publications in softcopy form are included on the base (OS/400) iSeries documentation CDs:

Content Manager for iSeries
• Planning and Installation
• System Administration Guide
• Getting Started with Client for Windows
• Understanding Advanced Workflow
• Messages and Codes
• Application Programming Guide and Reference

The following publications also ship in hardcopy format with Content Manager for iSeries:
• The License Information Document
• Read Me First (hardcopy)
• Proof of Entitlement (PoE)

If you order the optional feature for Advanced Workflow, you will receive one CD and the following entitled publication in softcopy form:
• Content Manager for iSeries Understanding Advanced Workflow

Security, Auditability, and Control

IBM Content Manager for iSeries V5R1 uses the security and auditability features of Operating System/400® (OS/400).

The customer is responsible for evaluation, selection, and implementation of security features, administrative procedures, and appropriate controls in application systems and communication facilities.

Ordering Information

Usage Restriction

If You Are Ordering Through Passport Advantage

• You should order the appropriate number of License Only, License plus Subscription, or License plus Subscription and Support part numbers that meet your requirements.
• Media Packs must be ordered separately from program licensing to receive shipment of the appropriate program media.
• Under Passport Advantage only, IBM EDMSuite™ ImagePlus® VisualInfo™ for AS/400 customers may trade up certain features for IBM Content Manager for iSeries with the following orderable components:
  - Each EDMSuite ImagePlus VisualInfo Concurrent User may trade up to one Content Manager for iSeries Concurrent User.
  - Each EDMSuite ImagePlus VisualInfo Server may trade up to one Content Manager for iSeries Server.
  - Each EDMSuite ImagePlus VisualInfo Advanced Workflow feature may trade up to one Content Manager for iSeries Advanced Workflow feature.

By using the program, you agree to the terms and conditions of the hardcopy IBM International Program License Agreement (IPLA), including the Content Manager electronic License Information document.

If you are ordering through Build-to-Order fulfilled by SDF, order one or more of the following to meet your requirements:

One Server Base One-Time Charge (OTC): Your license to the program entitles you to install program servers on one physical server or node. If you wish to install additional program servers on additional physical servers or nodes, including distributed iSeries Object Servers, you must acquire additional Proofs of Entitlement. The
Content Manager program pack includes one Concurrent User. Media is provided with this item.

One Server Advanced Workflow (Workflow Builder for iSeries): In the event you acquire the Advanced Workflow Optional Feature, you are authorized to install the feature on an unlimited number of workstations that are attached to a single program server. In the event you wish to attach to additional program servers, you must acquire additional PoEs. Media is provided with this item.

Proofs of Entitlement

Concurrent Users Feature: The number of concurrent users is defined as the maximum number of users connected to the program servers at one time. You must acquire an authorization for each concurrent user. The number of concurrent users may not exceed the number authorized by the applicable Concurrent User PoE.

Gateway Feature: The Gateway Feature must be acquired for application logons to the program server that support a specified number of users for a defined period of time. One Gateway Feature is required for every 20 individual users over a one-hour period of time who will access the program server via the application logons. For example, if shared application logons will allow up to 200 individual users to access the program server during a peak usage hour of the day, then a quantity of 10 Gateway Features would be required for appropriate use authorization. You must acquire appropriate PoEs for Gateway Application Access supporting your defined use.

Upgrades

- Program Pack Upgrades of IBM Content Manager V5R1 may be acquired from IBM EDMSuite ImagePlus VisualInfo for AS/400. Media is provided with this item. Customers may upgrade from IBM Content Manager for AS/400 (V4R1 or V4R3) (previously known as EDMSuite ImagePlus VisualInfo for AS/400) directly to IBM Content Manager for iSeries V5R1.

- Upgrades of the IBM Content Manager Advanced Workflow feature may be acquired from the Advanced Workflow feature of the IBM EDMSuite ImagePlus VisualInfo for AS/400 V4R3. Media is provided with this item.

- PoE Upgrades may be acquired to upgrade additional licenses, including Secondary Object Servers, and Concurrent User of IBM EDMSuite ImagePlus VisualInfo for AS/400. Media is not provided with these items.

- Previous IBM EDMSuite ImagePlus VisualInfo for AS/400 Unlimited Concurrent User licenses continue to be honored in Content Manager for iSeries V5R1. Customers must retain their prior PoE as evidence of their persistent, unlimited Concurrent User PoE for V5R1 and beyond.

Passport Advantage

Program Name/Description: Content Manager iSeries V5.1 Media Pack Multilingual
Part Number: BF7KZML

Program Name/Description: Content Manager iSeries Workflow Feature V5.1 Media Pack English
Part Number: BF7L4ML

<table>
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Program Name/Description

Part Number

CO SW Sub Content Manager iSeries Server 2 Anniv
D56B3ML

CO Supt Content Manager iSeries Server 1 Anniv
E16C4ML

CO Inst/SW Sub/Supt Content Manager iSeries Server 1 Anniv
D56QLML

CO SW Sub/Supt Content Manager iSeries Server 1 Anniv
D56A2ML

CO SW Sub/Supt RnwI Content Manager iSeries Server
E17VSM

Content Manager iSeries Advanced Workflow Feature
VPO Instl CM iSeries Workflow Feature Server
D57S3ML

VPO Instl/SW Sub CM iSeries Workflow Feature Server 1 Anniv
D57S4ML

VPO Instl/SW Sub CM iSeries Workflow Feature Server 2 Anniv
D57S5ML

VPO SW Sub RnwI CM iSeries Workflow Feature Server
E17VNML

VPO SW Sub CM iSeries Workflow Feature Server 1 Anniv
D57WBML

VPO SW Sub CM iSeries Workflow Feature Server 2 Anniv
D57WDML

CO Instl/SW Sub CM iSeries Workflow Feature Server 1 Anniv
D57WEML

CO Instl/SW Sub CM iSeries Workflow Feature Server 2 Anniv
D57WFML

CO SW Sub RnwI CM iSeries Workflow Feature Server
E17XYML

CO SW Sub CM iSeries Workflow Feature Server 1 Anniv
D57XZML

CO SW Sub CM iSeries Workflow Feature Server 2 Anniv
D57Y0ML

CO Supt CM iSeries Workflow Feature Server 1 Anniv
E17Y1ML

CO Instl/SW Sub/Supt CM iSeries Workflow Feature Server 1 Anniv
D57Y4ML

CO Instl/SW Sub/Supt CM iSeries Workflow Feature Server 2 Anniv
D57Y5ML

CO SW Sub/Supt CM iSeries Workflow Feature Server 1 Anniv
D57Y9ML

CO SW Sub/Supt RnwI CM iSeries Workflow Feature Server
E17YMML

Content Manager iSeries Tradeup
VPO Trd Instl/SW Sub Content Manager iSeries Server 1 Anniv
D5695ML

CO Trd Instl/SW Sub Content Manager iSeries Server 1 Anniv
D5696ML

CO Trd Instl/SW Sub/Supt Content Manager iSeries Server 1 Anniv
D5697ML

VPO Trd Instl/SW Sub Content Manager iSeries Con User 1 Anniv
D5698ML

CO Trd Instl/SW Sub Content Manager iSeries Con User 1 Anniv
D560LML

VPO Trd Instl/SW Sub CM iSeries Advanced Workflow Server 1 Anniv
D563YML

CO Trd Instl/SW Sub CM iSeries Advanced Workflow Server 1 Anniv
D563AML

CO Trd Instl/SW Sub/Supt CM iSeries Advanced Workflow Server 1 Anniv
E1649ML


Terms and Conditions

Licensing:
IBM International Program License Agreement. PoEs are required for all authorized use.

License Information Form Number:
4SFJRH, GC52-0896-00

Limited Warranty Applies:
Yes

Program Services:
Available until May 31, 2003

Money-Back Guarantee:
Two-month, money-back guarantee

Copy and Use on Home/Portable Computer:
No

Volume Orders (IVO):
No

Passport Advantage Applies:
Yes

Passport Advantage Subscription Applies:
Yes

IBM Operational Support Services — Support Line:
Yes

AIX®/UNIX® Upgrade Protection Applies:
No

Entitled Upgrade for Current AIX/UNIX Upgrade Protection Licensees:
No

AS/400 Software Subscription Applies:
Yes

Variable Charges Apply:
No

Educational Allowance Available:
Yes, 15% education allowance applies to qualified education institution customers.

Prices

Program Name/Description
Part Number
Level A License Only Price

VPO Instl Content Manager iSeries Concurrent User
D56WNML
$ 1,346

VPO Instl Content Manager iSeries Gateway
D570KML
17,940

VPO Instl Content Manager iSeries Server
D569VML
8,959

VPO Instl Content Manager iSeries Workflow Feature Server
D57S3ML
6,273

201-120
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**Upgrades**

Contact your sales channel for IBM Operational Support Services — Support Line pricing information.

**IBM Content Manager for iSeries (5722-V11):** For AS/400 feature numbers, refer to Software Announcement 201-114, dated April 23, 2001.

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