

Unlock insights for quick, confident decisions with agentic AI

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Organizations are dealing with unprecedented amounts of data

175

Zettabytes of anticipated global data by 2025¹

80%

Information that is unstructured or semi-structured content²

61%

Companies that say data volume limits their ability to fully harness their data³

Source: 1. Deloitte 2023 – 1 zettabyte is equal to 1 trillion gigabytes

Source: 2. MarketsandMarkets 2019

Source: 3. G2 2023

#1

How many of you
spend time reading
or reviewing
documents as part of
your day-to-day
work?

#2

How much time per day are you spending reading or reviewing documents?



Information is
buried in
documents,
resulting in poor
decision-making,
productivity decline,
and lost
opportunities



Manual review of documents is *still* one of the biggest pain points across industries

“Our users are in the FileNet viewer reading documents all day long to find information.

Anything that would reduce that time would be a big win.”



“We have millions of documents stored in our repository, but it’s almost impossible to get the right answer without a lot of manual content search.”



“Today, we have people manually checking information collected from documents.”



“Our users need to find the information they need in a **quick and controlled** manner.”



“Being able to **summarize** and pull out key pieces of data from our documents is a **huge time saver**.”



“We receive documents that contain information related to multiple customers, and users have to **manually extract information**.”



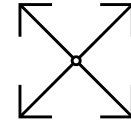
Apply AI; **Increase productivity**



Ask questions and
get answers about
a document or set
of documents
across terabytes of
data



Automatically
generate
summaries to
quickly access the
information you
need

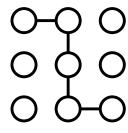


No complex
software to install –
take advantage of
LLMs with your
existing
repositories





Prevent data leakage – document security is always honored

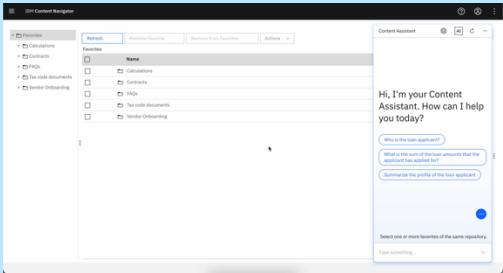


Traceable and auditable – see what was used to generate answers and save Q&A for auditing

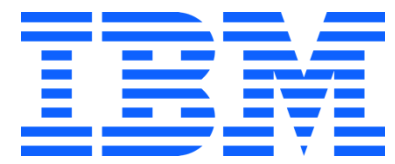


Maintain compliance – when documents are deleted, all related information is also deleted

Use IBM Content Assistant;
Preserve governance and security



Demo





enChoice AI Enabler for FileNet

Presenter:
Michael Monteiro, Senior Consultant



#1

Are your documents
AI-ready?

#2

Have you tried (and failed) to copy text from a PDF?

(e.g., to paste into a Word document)

#3

Do you have Records Management in your job title or job description?

enChoice AI Enabler for FileNet

Client readiness is key to leveraging Content Assistant.

Business Challenge

- ✓ FileNet clients have massive repositories containing valuable information that **can only be searched by document properties.**
- ✓ Most **content repositories are not fully AI-ready**, so clients cannot fully leverage IBM Content Assistant. For example, documents stored as **TIFF or image-based PDFs** are not AI-ready.

AGENCY PHONE (A/C, No, Ext): 813-555-4400 SAINT PAUL TRAVELERS CO		COMPANY NAIC CODE: 3548 TRAVELERS		MISCELLANEOUS INFO (Site & location code) Tampa SPT 1	
FAX (A/C, No): 813-555-4410 E-MAIL ADDRESS: SPtravelers@tampa.travelers.com		POLICY NUMBER 187-1212-715-0		POLICY TYPE Full	
CODE: AGENCY CUSTOMER ID: 000101202		SUB CODE: SPT		REFERENCE NUMBER 340098	
EFFECTIVE DATE 7/1/2023		EXPIRATION DATE 6/30/2024		DATE OF ACCIDENT AND TIME 9/30/23 9:50	
				<input checked="" type="checkbox"/> AM <input checked="" type="checkbox"/> PM PREVIOUSLY REPORTED <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	
INSURED					
NAME AND ADDRESS Theresa Hackingstone 207 Hummingbird Way Tampa, FL 33606		SOC SEC # OR FEIN: 143-22-0991			
RESIDENCE PHONE (A/C, No): 813-62508931 CELL PHONE (A/C, No): 813-6762942		BUSINESS PHONE (A/C, No, Ext): 813-61017587 E-MAIL ADDRESS: thackingstone1@gmail.com		CONTACT INSURED	
				CONTACT	
		NAME AND ADDRESS Theresa Hackingstone 207 Hummingbird Way Tampa, FL 33606		WHEN TO CONTACT: Daytime WHERE TO CONTACT: Home or Cell	
		RESIDENCE PHONE (A/C, No): 813-62508931 CELL PHONE (A/C, No): 813-6762942		BUSINESS PHONE (A/C, No, Ext): 813-61017587 E-MAIL ADDRESS: thackingstone1@gmail.com	
LOSS					
LOCATION OF ACCIDENT (Include city & state) Tampa, FL		THREATENED PROPERTY 207 Hummingbird Way 33606		AUTHORITY CONTACTED: Tampa PD REPORT #: 23-093087	
DESCRIPTION OF ACCIDENT (Use separate sheet, if necessary) Wind from storm knocked over a tree on Theresa's property which fell onto the road and hit multiple cars.				VIOLATIONS/CITATIONS N/A	

enChoice AI Enabler for FileNet

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Business Solution

- ✓ **enChoice's AI Enabler** focuses on “**client readiness**” by converting documents into a searchable format that can fully leverage IBM Content Assistant.



enChoice AI Enabler: [How it Works](#)



Leverages the FileNet Sweep framework:

- ✓ Choose the relevant documents to AI enable
- ✓ Can be scheduled to run during non-business hours
- ✓ Scalable to address document processing requirements

enChoice AI Enabler: How it Works



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Conversion process

- ✓ Retrieves PDF and TIFF documents from FileNet
- ✓ Performs OCR
- ✓ Embeds the text in the pages
- ✓ Adds a new document version to the repository

enChoice AI Enabler: How it Works



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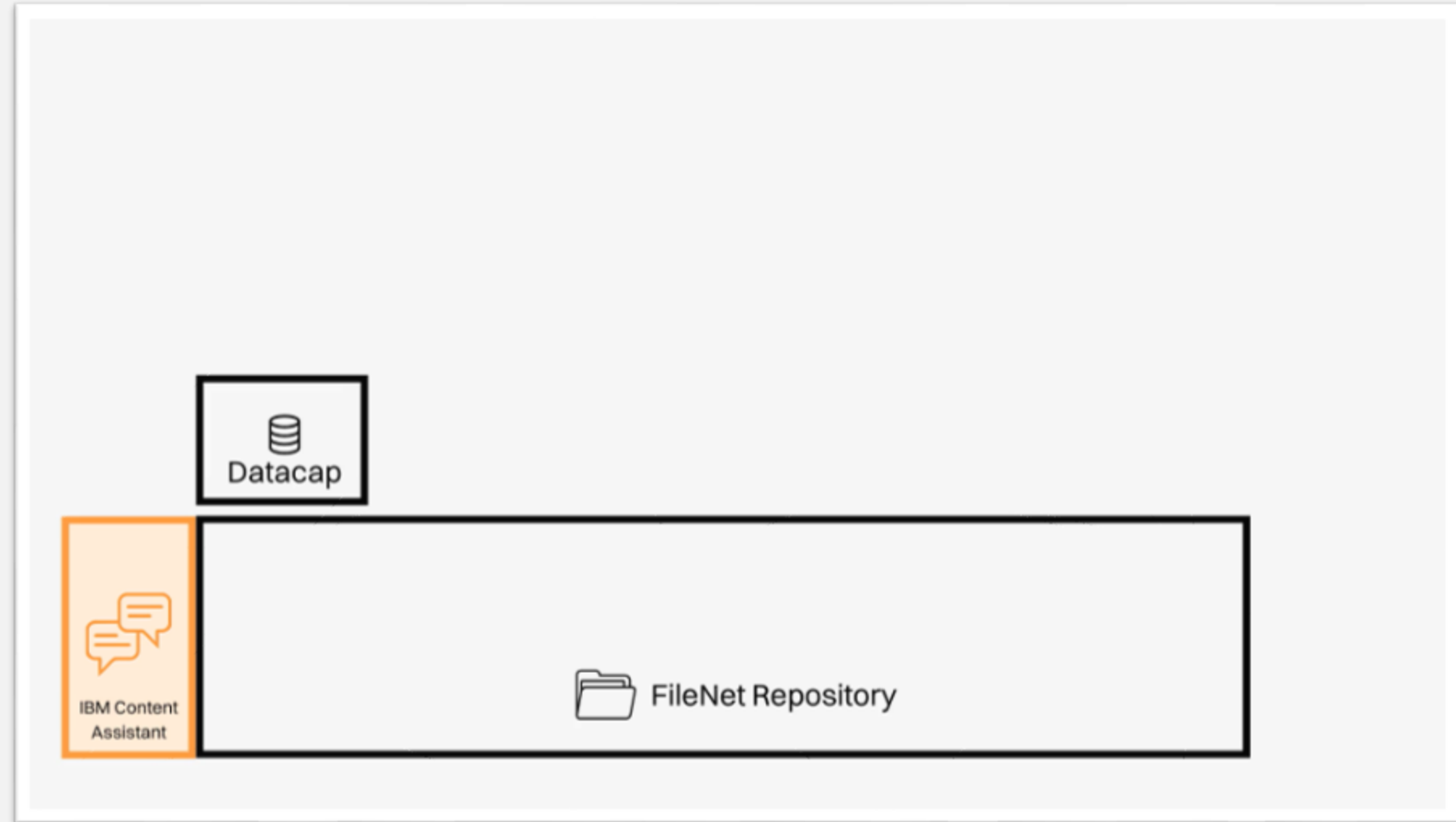
Conversion process

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Enables both existing and day-forward content



How enChoice AI Enabler Works

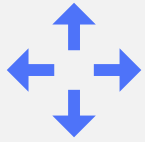


enChoice AI Enabler for FileNet Use Case #1: Business Manuals



- ✓ Agent/field office support model
- ✓ Documents that are both archived and added to FileNet daily
- ✓ Want to empower agents to ask questions of that content
- ✓ Reduce underwriting support required

Use Case #1: | Business Problem



Dynamic environment

- ✓ **Volume growth**
- ✓ **Employee turnover**



Traditional search based on
index values
**generates large document
result sets**



Requires **extensive
manual review** to find
the answers

Use Case #1: | Assumptions

800,000+
Documents

800,000+ existing documents in FileNet for summarization and Q&A by IBM Content Assistant

4 Million
Pages NOT AI Ready!

800,000 documents
x 5 pages per document = 4 million pages of PDF Images and TIFF files – NOT AI Ready!

650
Questions

Users will ask approximately 650 questions per day

Use Case #1: | Solution



Research that took
4+ minutes can
now be done in
seconds!



Improved agent
self-service and
satisfaction



Agent Support
FTE Savings:
***5.4 full-time equivalent
employees**

*650 queries x 4 minutes = 2,600 minutes / 60 minutes per hour = 43.33 hours per day savings / 8 work hours per day = 5.42 FTEs

enChoice AI Enabler for FileNet Use Case #2: Claim Documents



- ✓ A large insurance company claims division
- ✓ Over 1,200 employees interacting with multiple documents simultaneously
- ✓ Documents received from multiple external channels (scanned, faxed, etc.) which often are NOT AI ready!

Use Case #2: | Business Problem



Massive claims repository that is ever growing



Research requires **several documents and various departments** (medical, legal, etc.) to satisfy an inquiry

Use Case #2: | Assumptions

10 Million Existing Documents

10 Million existing documents in FileNet for summarization and Q&A by IBM Content Assistant

40K New Documents Daily

40,000 new documents are added to FileNet every day

50 Million Pages NOT AI Ready!

10 Million documents x 5 pages per document = 50+ million pages of PDF
Images and TIFF files NOT AI Ready!

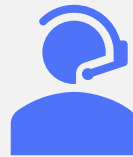
900 Questions Daily

Users will ask approximately 900 questions a day

Use Case #2: | Solution



Research that took
6+ minutes can
now be done in
seconds!



Improved
claim phone support



Claim Representative
FTE Savings:
***11.25 full-time
equivalent employees**

*900 queries x 6 minutes = 5,400 minutes / 60 minutes per hour = 90 hours per day savings / 8 work hours per day = 11.25 FTEs

Litigation/Compliance Concerns?

AI-informed decision-making is coming under **increased scrutiny** in the context of algorithm-driven discrimination:

Case #1

Williams v. Wells Fargo
Bank, Civil Act. No.
(N.D. Cal. Feb. 17,
2022)


Case #2

Mobley v. Workday,
Civil Act. No. 23-cv-
00770-RFL
(N.D. Cal. Feb. 21,
2023)

Case #3

EEOC Report to
Congress on AI-
Driven
Discriminatory
Hiring Risks (June
14, 2024)

Litigation/Compliance Concerns?

- 
- ✓ KwikNAV AutoDeclare *automatically* declares into IBM Enterprise Records (IER)
 - ✓ Manage the full AI Q&A session as an official record governed by ***your*** retention schedule
 - ✓ You are ready for eDiscovery, audit, and defensible disposition!

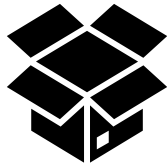
Summary: IBM Content Assistant + enChoice AI Enabler

- ✓ Fully utilize AI capabilities with your FileNet content
- ✓ See immediate productivity gains
- ✓ Get up and running quickly on your first use-case



enChoice AI Offering

Offering all the key components and thought leadership to get you up and running with your first use case.



enChoice Services Starter Pack

Use Case Identification

Software Installation

Use Case Configuration

Verification of Results

Starting at \$10,000



enChoice AI Enabler for FileNet Subscription

Content Enablement

Documentation

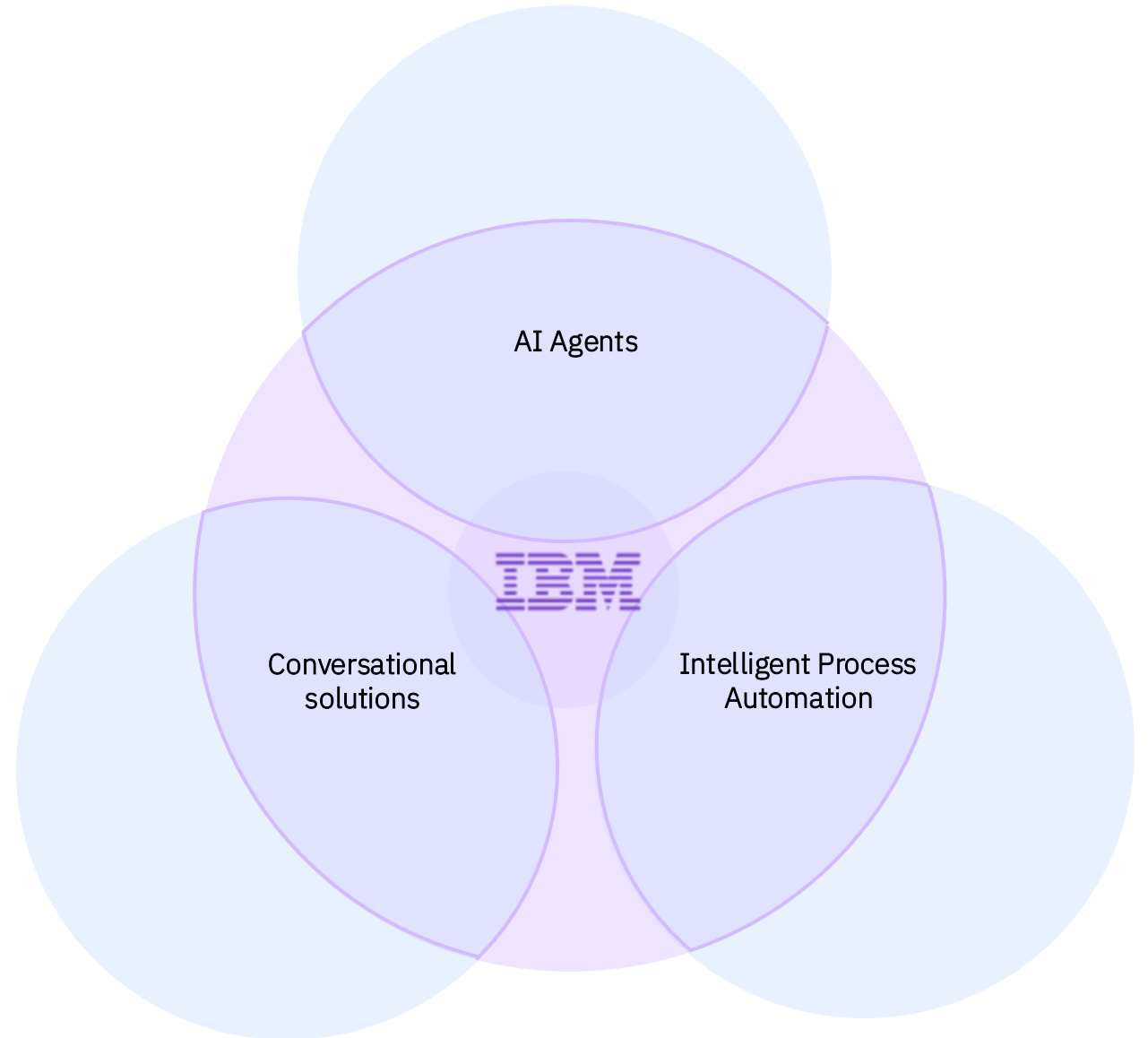
Support

\$3.75 per thousand pages



www.enchoice.com/ai-enabler

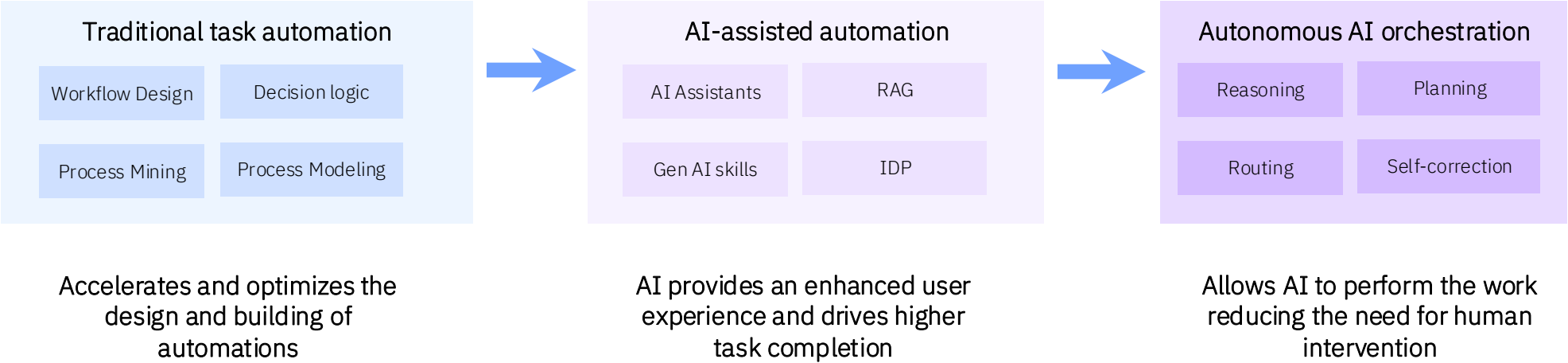
AI Agents tightly integrated with existing AI and automation investments, have ushered [a new opportunity to unlock Enterprise Productivity](#)



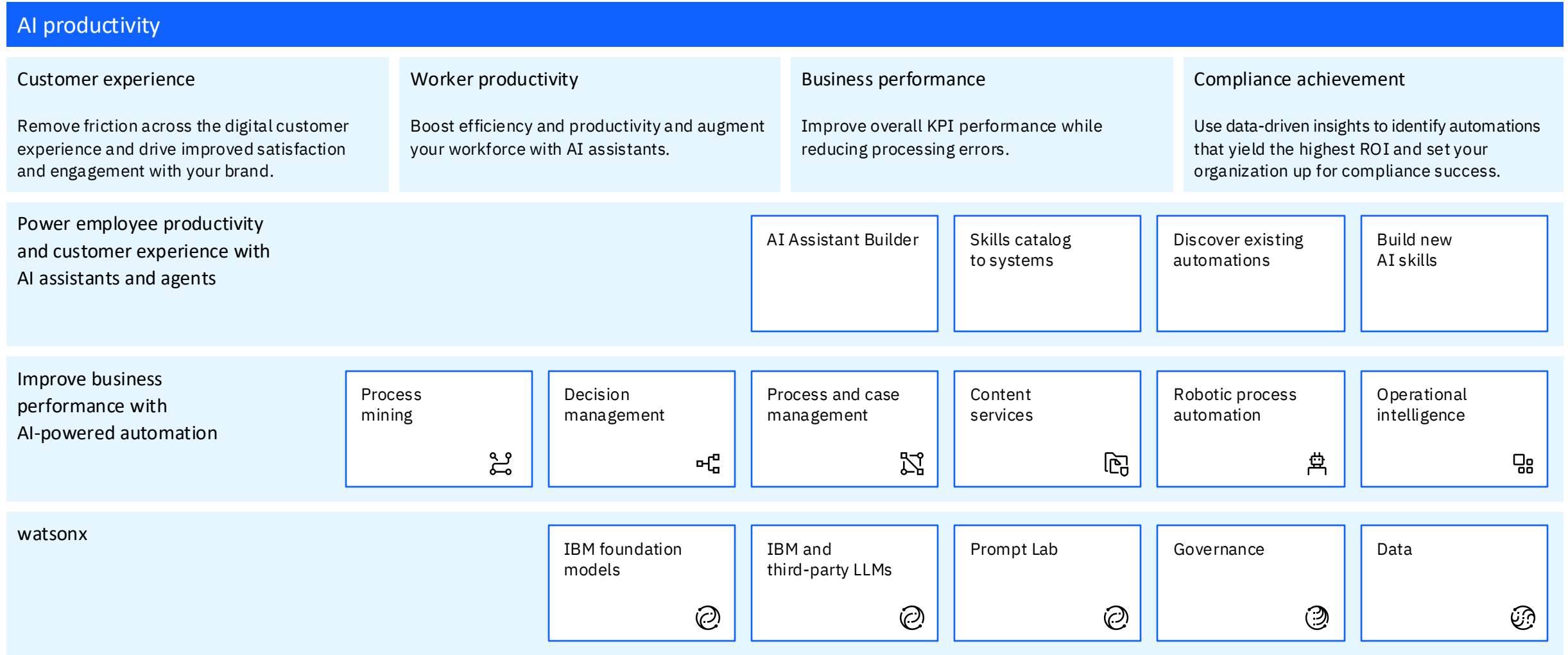
The evolution of Generative AI for intelligent business automation

Fixed Flow
Act as programmed

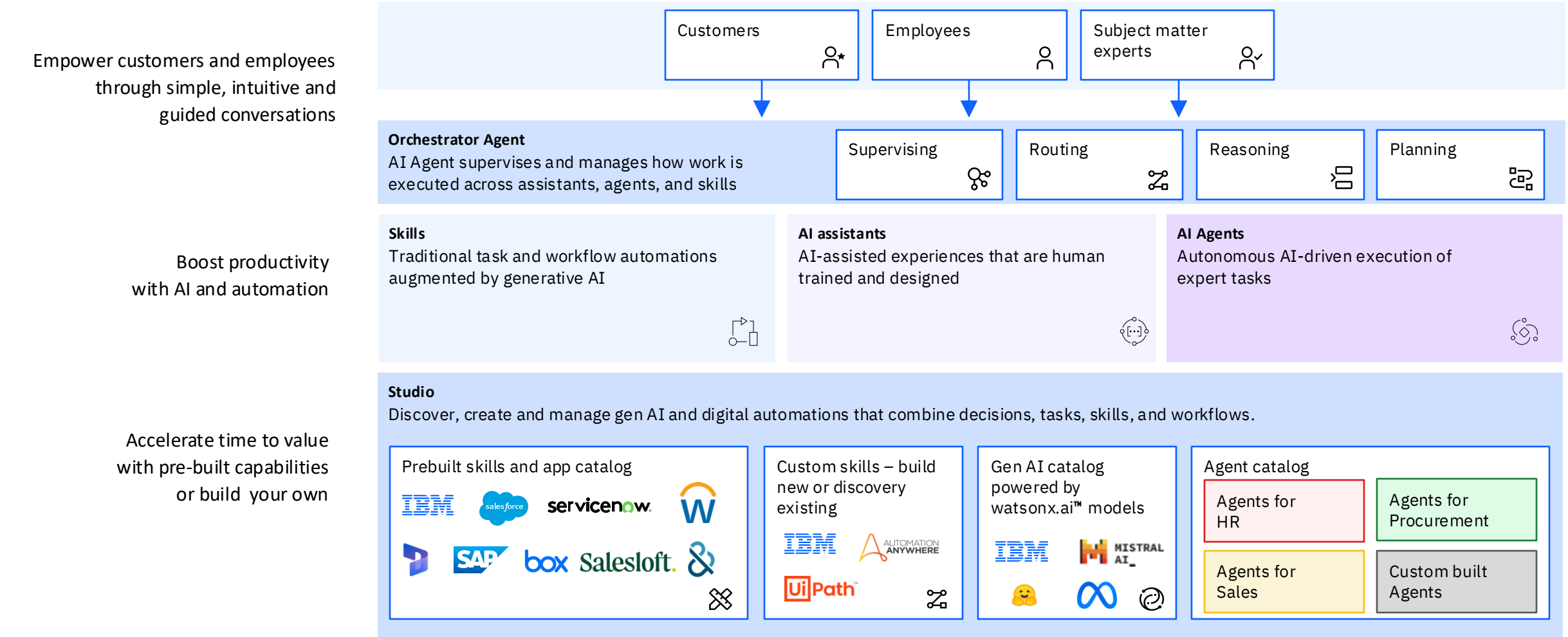
Autonomous Flow
Plan and self-correct



IBM's vision: providing enterprises with a unified experience to infuse AI and Automation across business processes

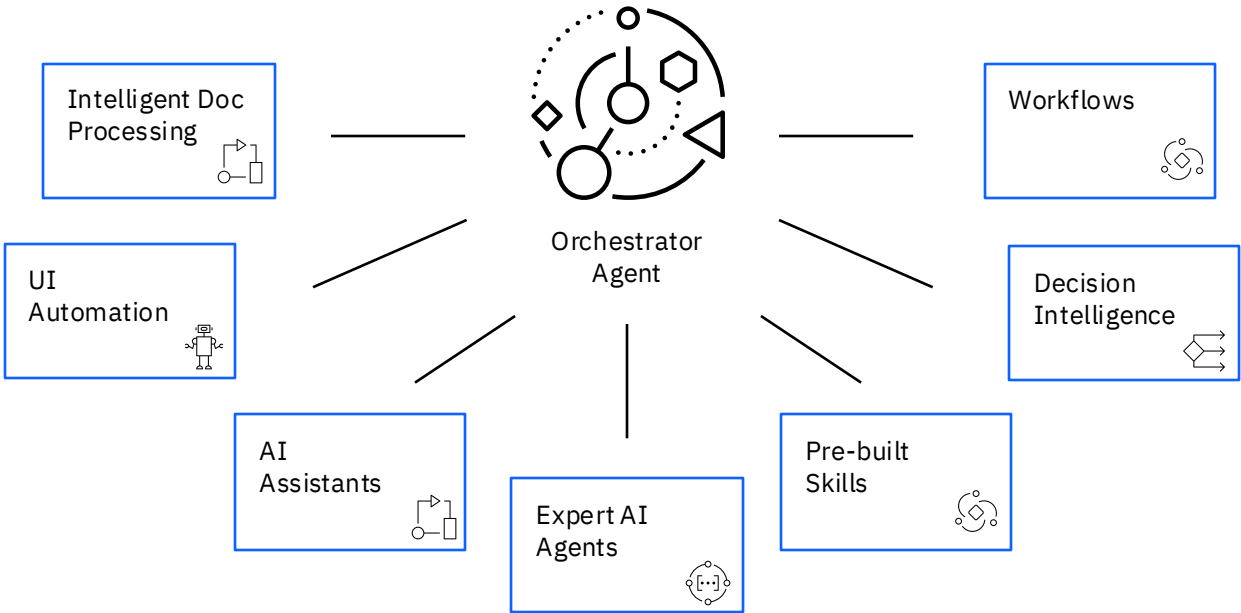


IBM watsonx Orchestrate conceptual architecture



Agentic orchestration unifies existing and future automation capabilities

Omni-channel experiences



Manage Data

- Data Lakehouse
- Vector Databases
- Content Services

Govern AI

- IBM and third-party LLMs
- Accelerated Fine-tuning
- Governance

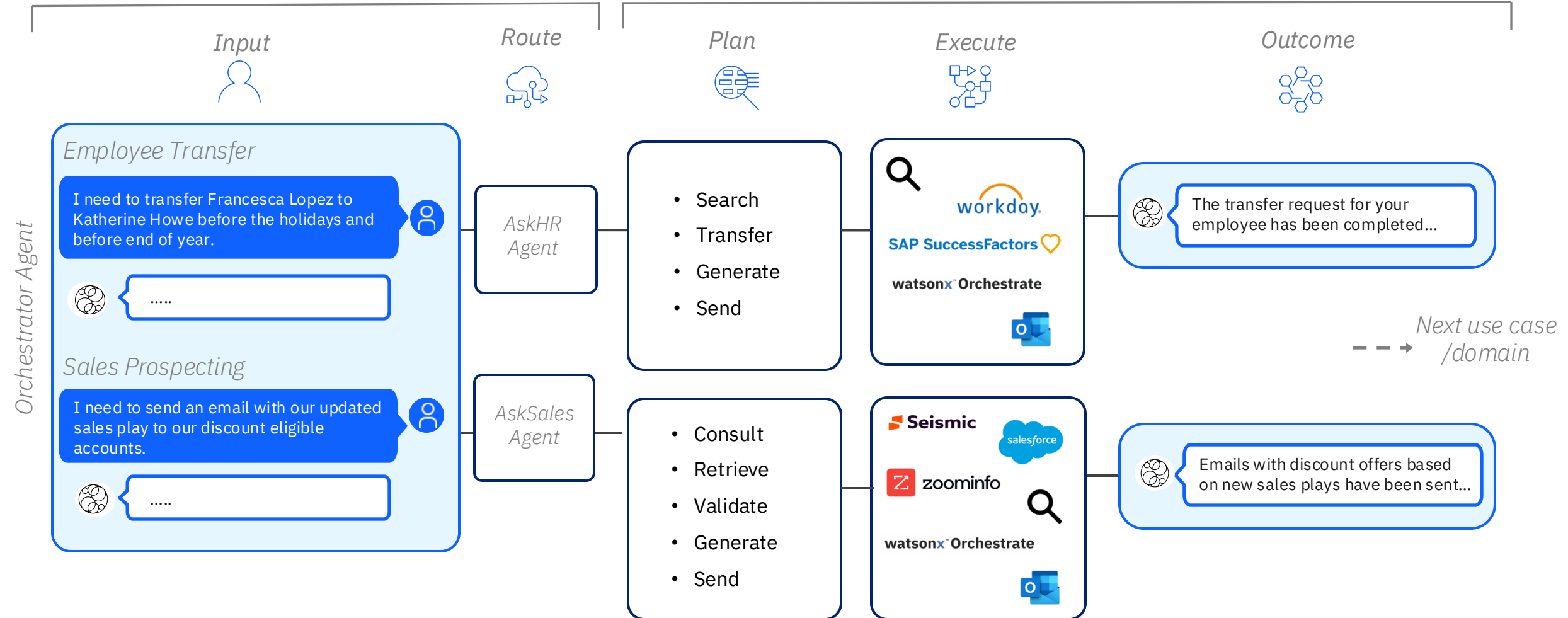
Process Design

- Process Modeling
- Process Mining
- Workflow Design

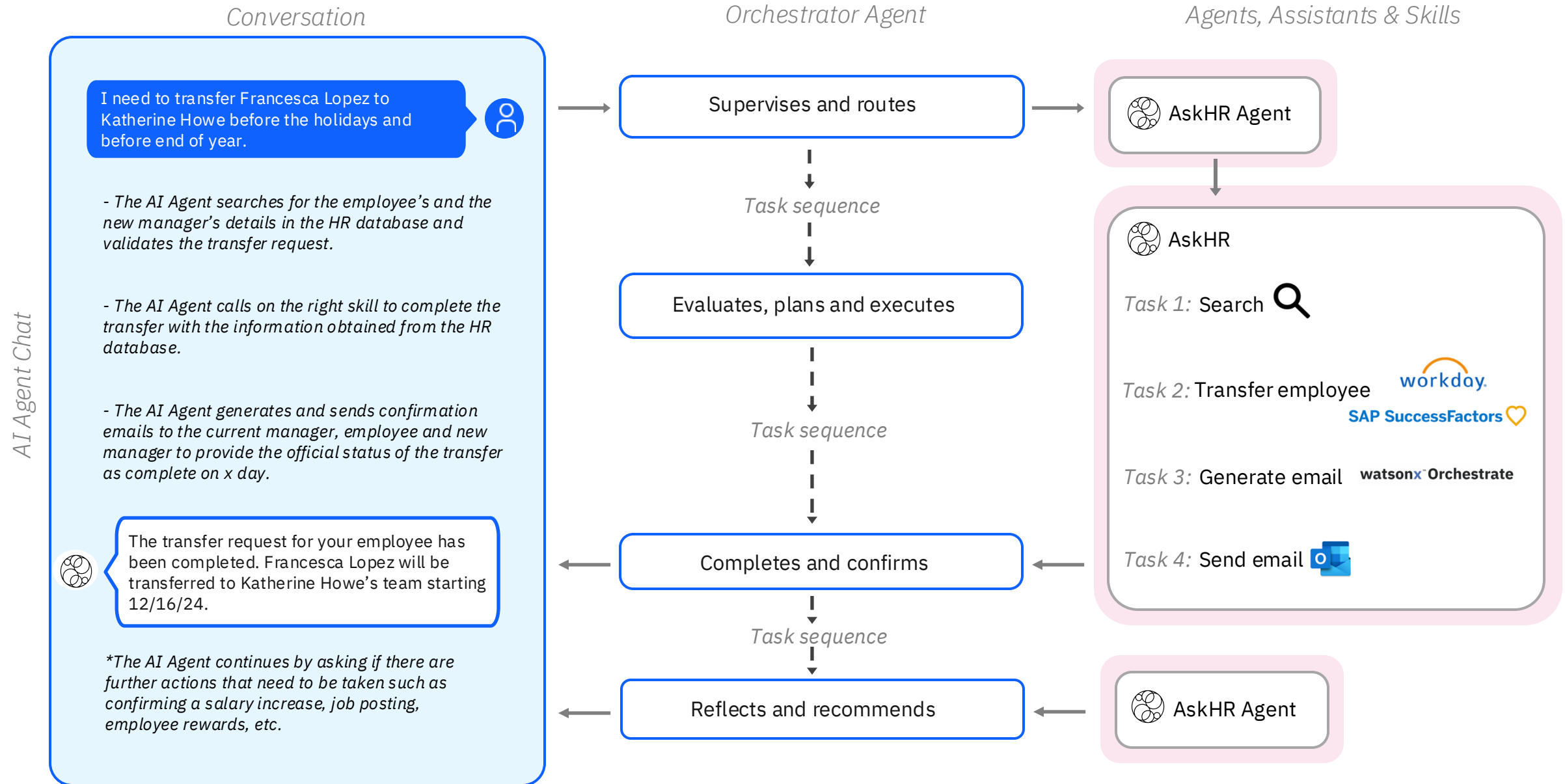
How Orchestrator Agent Reasons and Executes Across Domains

Evaluation and reflection...

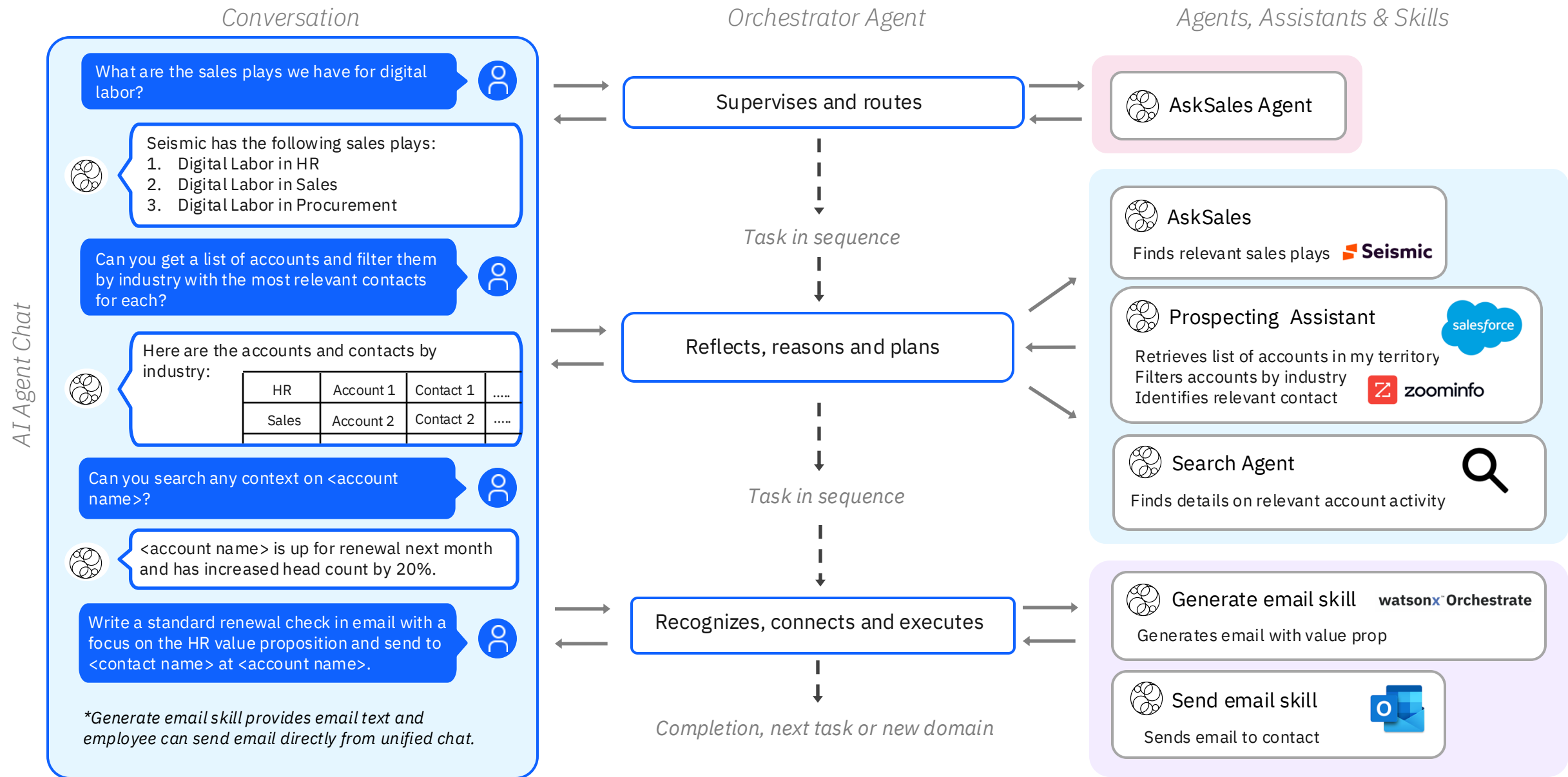
Autonomous reasoning and execution...



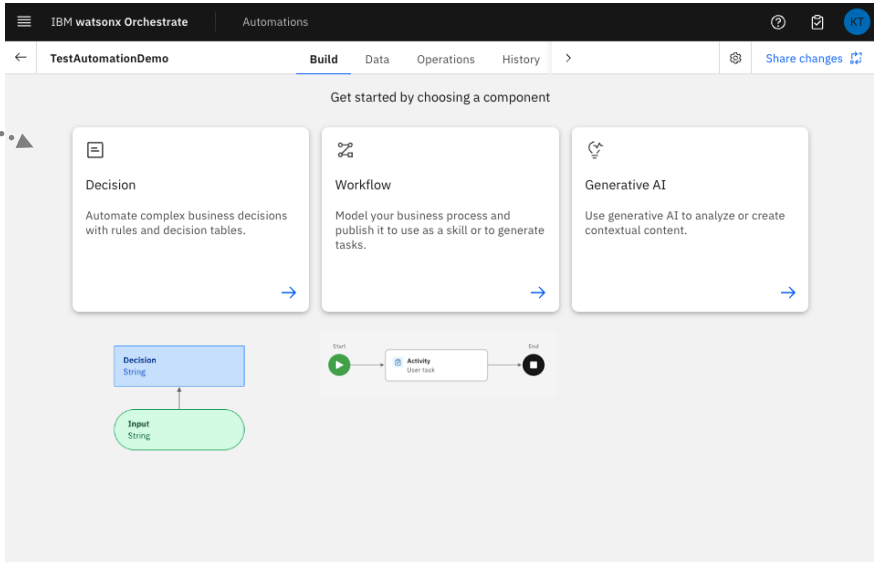
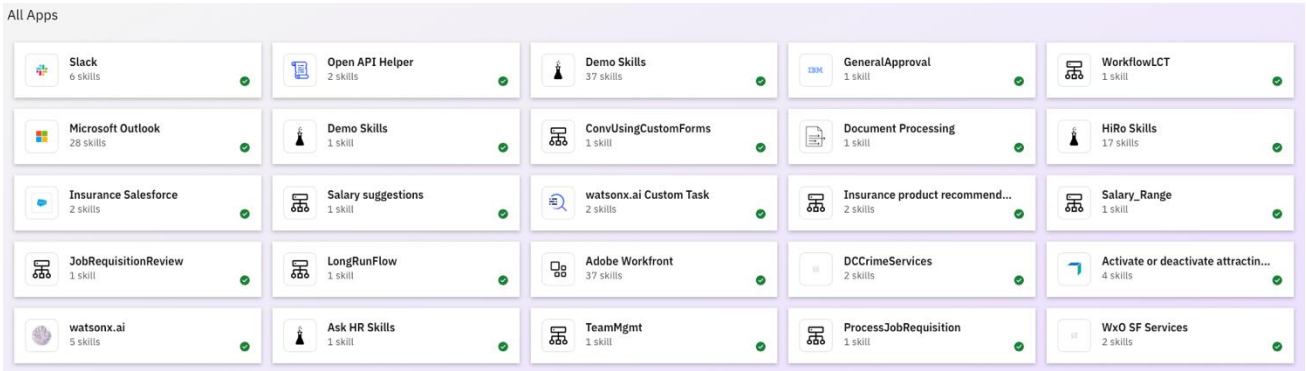
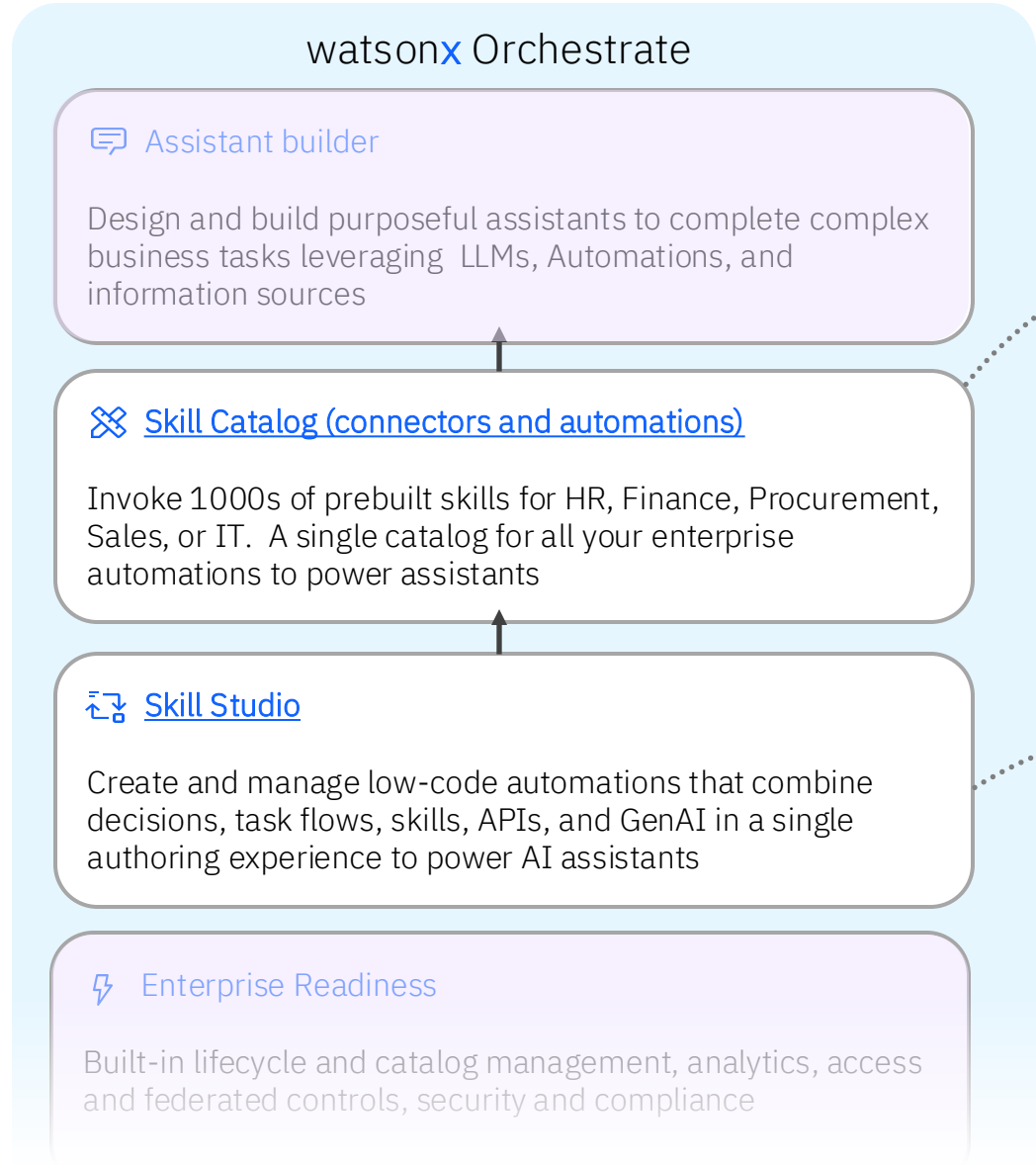
Orchestrator Agent Example Use Case: Employee Support



Orchestrator Agent Example Use Case: Sales Prospecting



Build and Deploy AI Assistants and Agents with watsonx Orchestrate



Build your own automations and publish them as skills through a low-code interface

Skill Studio

Decisions

- Low-code approach to express and refine operational decisions in a structured and visually intuitive way
- Can include rule-based and predictive models

Workflows

- No-code workflow authoring to define a set of linked tasks designed to achieve a specific business purpose
- Includes existing skills, decisions, predictions, other automations

Generative AI

- Test, evaluate, and publish generative AI skills
- Select native IBM developed models as well as 3rd party LLMs
- Gen AI skills incorporate contextual variables within prompts

Intelligent Doc Processing (IDP)

- Build low code document processing steps that integrate into workflows
- Digitize, classify and extract data from documents
- Human-in-the-loop
- Handwriting extraction

 Skill-based
40 actions Add →

 Skills studio
Add →

Filter

Search

Artifacts

Analyze email

ExtractFromEmail

Generate email

variables

ExtractFromEmail

Open ruleflow

Preview mode Open the ruleflow in the editor to edit it.

Extract email

Get customer status

Get unit price

Calculate price and promotions

Generate email

Issue quote

Start

Automated Quote Automation

Branch

Amount < 10000

Automatic approval Assignment

Manual approval User task

Branch 1

Approved

Cancel quote Assignment

Else

End

Prompt

Create a prompt to analyze or produce contextual content.

Model: mixtral-8x7b-instruct-v01

Generate

Instruction

Reply as a sales representative writing an email with a commercial offer to a customer. Indicate the product and the commercial details, the reason for a potential discount and a polite salutation.
At the beginning of the email, indicate the customer's email address and the subject in the form of:
To: customer name, email address.
Subject:

Prompt input

The customer is {{customer}}.
The customer's email address is: {{email}}.
the quantity and the product is: {{product}}.
the price before discount is: {{price}}.
the discount rate is: {{discount}}.
the discounted price is: {{discountedprice}} and the promotion is: {{promotion}}.
The sales representative is: {{reprename}} works for OFC Inc.

Write an email to indicate details about a quote. Indicate the product, the price and the discount.

Generated output

To: Bob Brown, bbrown@MyCo.com
Subject: Quote for 1 PhoPhone - Bronze level 2 discount
Dear Bob,
I hope this email finds you well. I am writing to provide you with a quote for a quantity of 1 PhoPhone.
The original price of the PhoPhone is \$1000, but I am pleased to offer you a Bronze level 2 discount of 5%, bringing the total cost down to \$950.
This discount is being offered as a special promotion for our valued customers like you. I would be happy to answer any questions you may have about the product or the discount.
Thank you for considering OFC Inc. for your technology needs. I look forward to hearing from you soon.
Best regards,
Tina
Sales Representative, OFC Inc.

192 tokens generated in 3.084s. Stop sequence: eos_token

Price and Discount

Decision node

Form

Node details

Price and Discount

Output type

Discount

discounted price, discount rate...

Output is a list

Description (optional)

Describe the decision node (optional)

Output variable name (optional)

Price and Discount

Same as decision node name

unit price number

quantity integer

company status status

total price number

Status discount Discount

Price and Discount



AI

Assistants



AskProcurement



DigitalSales



EmployeeServiceAgent



HealthInsuranceAgent



ResearchAgent



SalesAgent



WXA4Z



☀ Good Evening 5:49 PM

Hello, welcome to
watsonX Orchestrate.

Help me send an email
Understand AI capabilities with
the help of AI Assistant.



Hello, How are you?
Understand AI capabilities with
the help of AI Assistant.



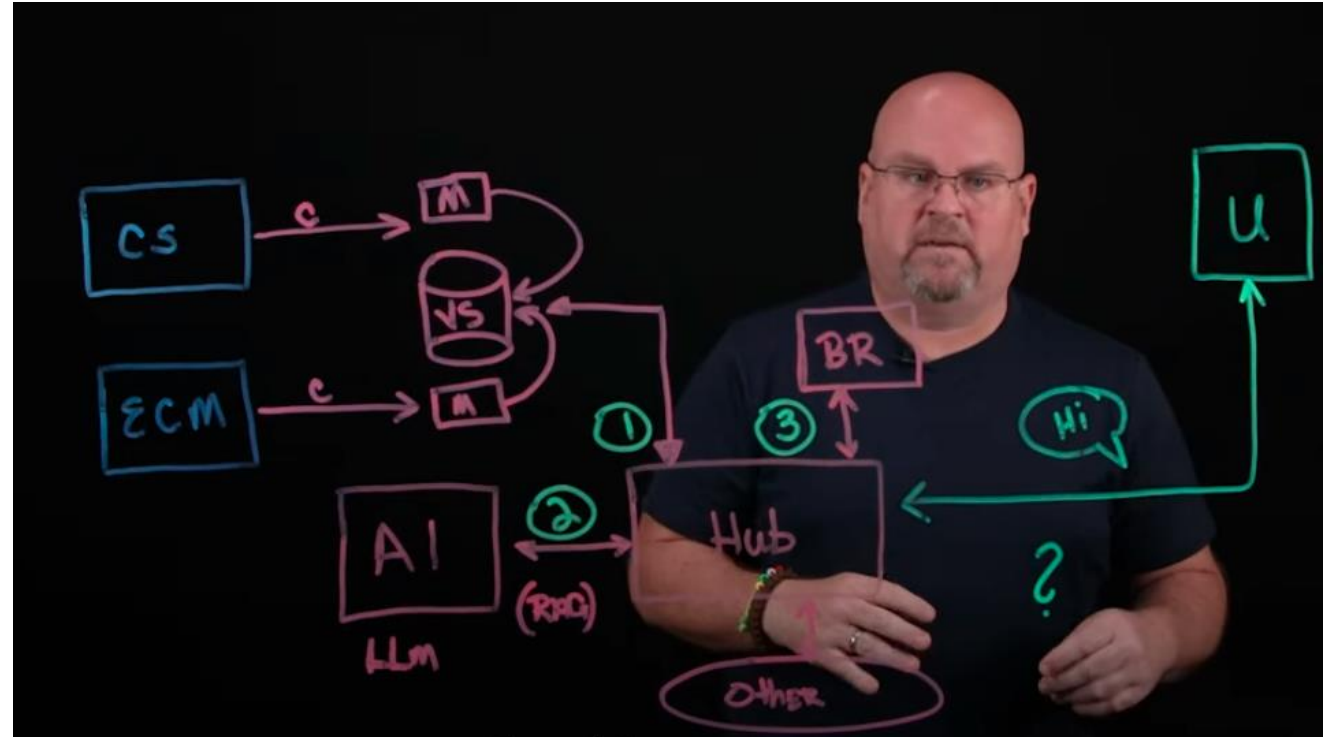
Good morning, What day is
today?
Understand AI capabilities with
the help of AI Assistant.



Type something...



Contract Automation



Functional Mapping

Contracting operational system of record
(If you generate contracts externally)

Enterprise Archive and Records System

Artificial Intelligence Operations

How does it all automate together?

Components

(Whats Needed)



Watsonx Orchestrate

- Coordinate all third-party systems from one interface
- Leverage workflow, rules and AI where it makes sense
- Low code – no code deployment



Group Discussion

What are your use cases for AI Agents?

