

**HELIX**  
international

# MARS Platform

October 2022 . . . . .



[www.helix-int.com](http://www.helix-int.com)

Connecting Big Data and Documents. At Scale.

# WHO WE ARE

- > Industry-leading experts in Enterprise Content Management (ECM) for **over 30 years**.
- > IBM partner of choice for data migration and process automation projects.
- > Holistic software platform of modular software clients, services, and APIs for ETLs, data consolidation and structuring, and bill presentment.
- > Servicing banks, insurance companies, healthcare, big retail, media, construction, manufacturing, distributors, and more.



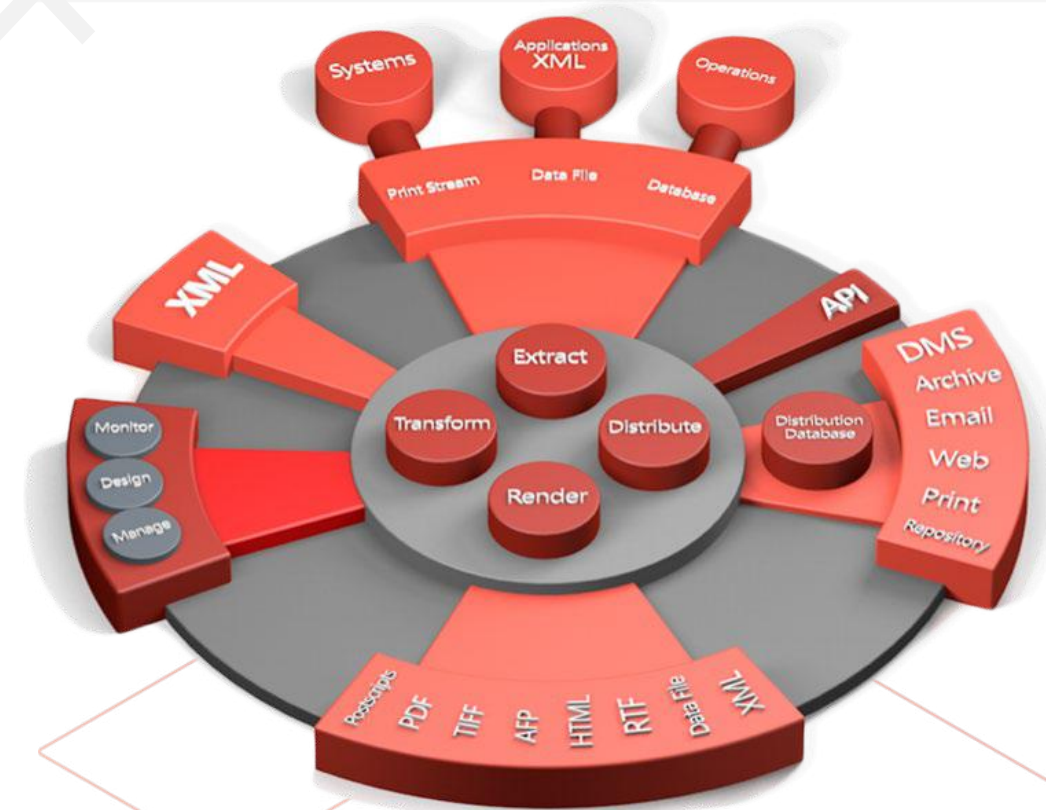
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international

**IBM**

# WHAT WE DO

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- > Done-For-You, Done-With-You, or Do-It Yourself **service options**.
- > **Find, collate, and combine** all your data across all data sources, even archived ones.
- > **Convert** unstructured data into structured data.
- > Create **new documents and reports** combining data from scattered sources.
- > Run **federated searches** to locate, normalize, and condense your documents by metadata.
- > **Automate large-scale updates and changes** to all your assets.
- > Import, change, or create **business rules and logic** to ensure document compliance and consistency.



# WHY US

# HELIX



**90+** employees in 7 global offices

**80+**

ECM devs &  
data engineers

**70+**

active  
status clients

**500+**

enterprise  
clients to date

**1,000+**

PB of  
migrated data

**100%**

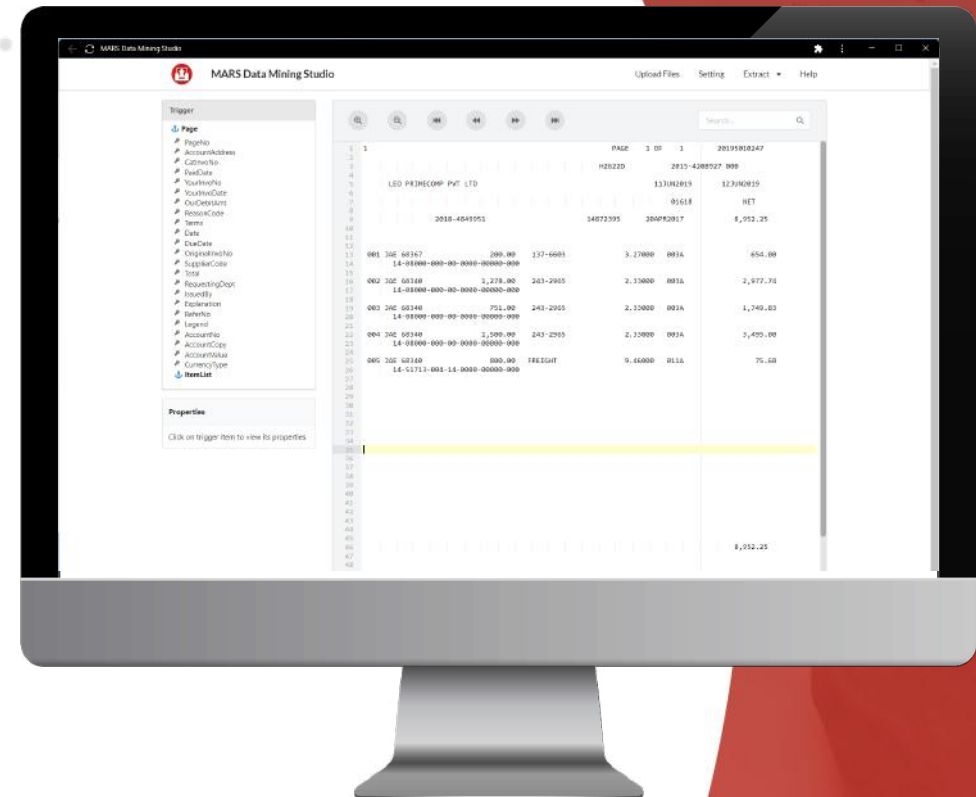
project  
success rate

# HELIX

## MARS Data Platform

Our proprietary **Massive Archival  
Retrieval System (MARS)**.

Everything you need to take control of  
your enterprise data and business  
processes, by web, desktop, or  
terminal client, and / or by  
microservices.





# MARS Platform

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All your enterprise data,  
invoices, receipts, print  
streams, and archives:



**Collated**



**Connected**



**Condensed**



**Combined**

**In one place,  
within any program,  
or with our simple UI.**

Locate, quantify, normalize,  
combine, and present documents  
and invoices in any format from  
any combination of structured  
and unstructured sources.



# FEATURES

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Unearth and organize invoices you didn't even know you had. Take from everywhere, send to anywhere, in any format.

**One user, one program,  
unlimited results**



## **Collate**

Unearth “dark data” and forgotten assets from archives that most viewers and content managers can't access.



## **Connect**

Link fragmented documents and invoices scattered across disparate databases and programs.



## **Condense**

Eliminate redundancy and data silos by automatically organizing content with shared metadata.

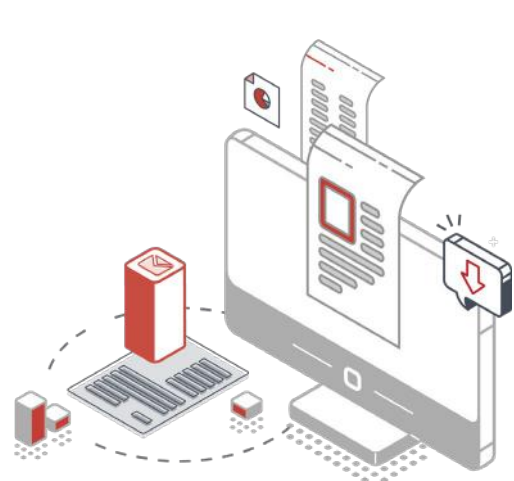


## **Combine**

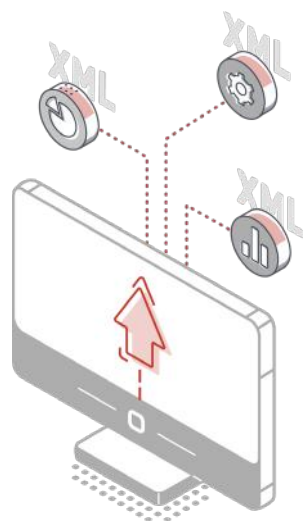
Create new documents and reports in new formats and apply rules-based changes to petabytes of data.

# PROCESS AUTOMATION

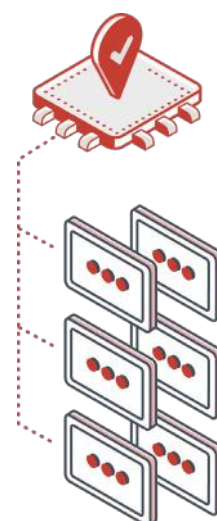
HELIX



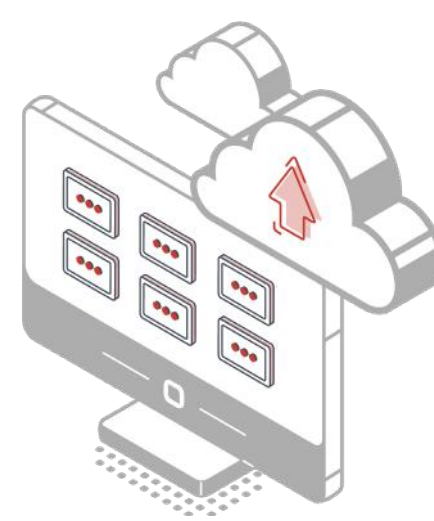
Automatically **process unstructured data** from incoming emails, scanned documents, CRMs, ERPs, and any other data sources.



Our software extracts, labels, and **structures all information with 100% accuracy** and encodes into universal XML.



**Business automation rules** and workflows are automatically triggered, normalizing contents for formatting, content, and brand compliance.

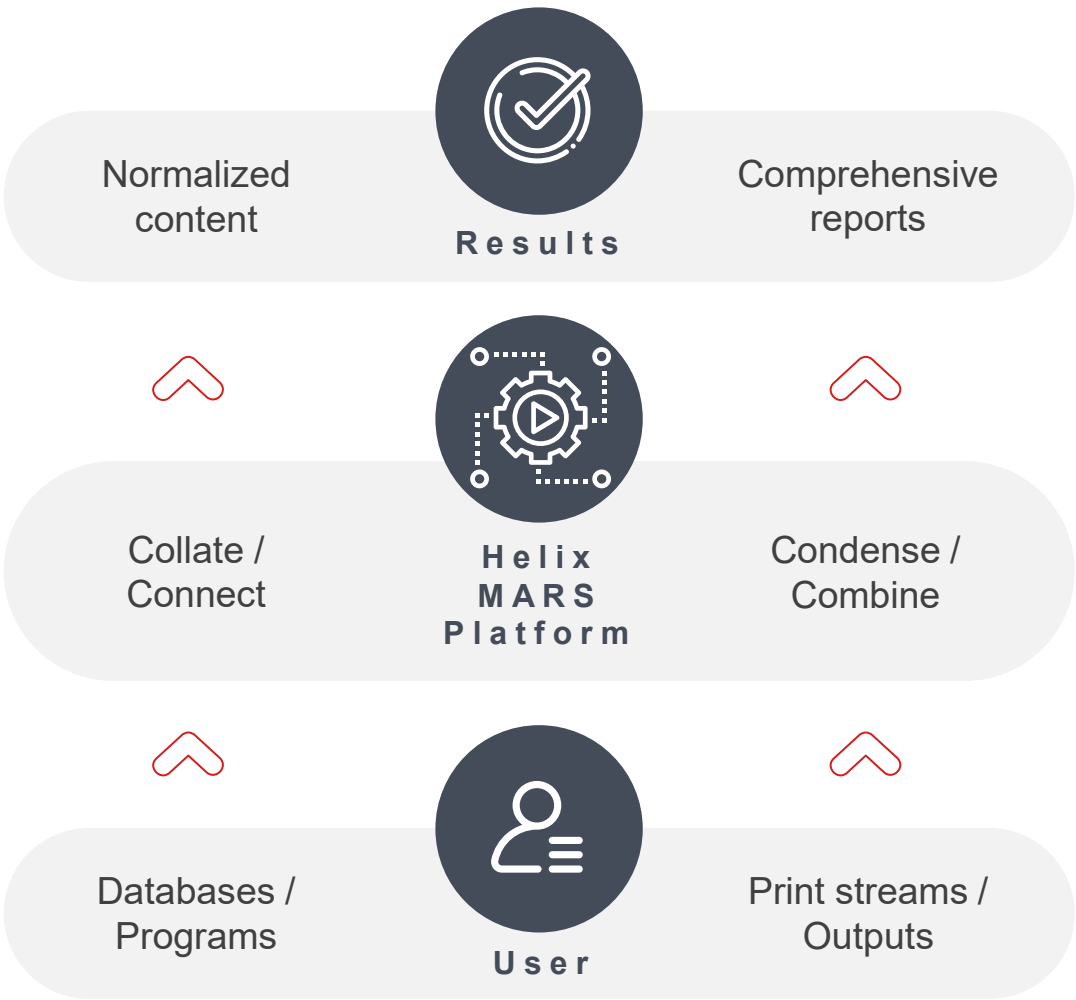


Finalized data is **loaded into your CRM, ECM, and / or ERP systems**, and can be viewed license-free in any native program via our APIs.

Automate your data and document management, business processes, and workflows.



# SOURCES

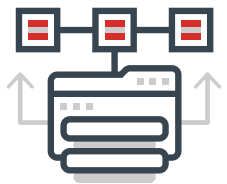


Works at any scale  
with 45+ sources and  
40+ filetypes.

APPLICATIONS		FORMATS
<ul style="list-style-type: none"><li>• IBM Filenet, Panagon, P8, Saros, CMOD, Image Plus, CM8, Image Service</li><li>• Hyland OnBase</li><li>• Oracle Optika, Stellant, UCM</li><li>• ASG Mobius, OIT Docfinity</li><li>• CA View, Deliver (SAR, Express), Dispatch, Bundl</li><li>• BMC Ctrl D</li><li>• Viewstar</li><li>• Watermark Laserfiche</li></ul>	<ul style="list-style-type: none"><li>• OpenText Content Suite (Livelink), Hummingbird, Vista Plus, EMC Documentum</li><li>• Filetek Ammo</li><li>• MS Sharepoint</li><li>• Systemware X/PTR</li><li>• BetaSystems</li><li>• Beta92/93</li><li>• Newgen Software</li><li>• O2MS, OmniReports</li><li>• Datastore32</li><li>• RSD EOS / Folders</li><li>• Custom Solutions</li></ul>	<ul style="list-style-type: none"><li>• Postscript</li><li>• PCL</li><li>• Adobe PDF</li><li>• IBM Advanced Function Printing (AFP)</li><li>• Xerox DJDE, Metacode</li><li>• JPEG, TIFF</li><li>• XML</li><li>• HTML</li><li>• XLST:FO, XLST</li><li>• Many, many more</li></ul>

# PLATFORM COMPONENTS

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## **MARS DataMining Studio (DMS)**

Extract data across any filetypes, sources, print streams, archives, and outputs, structure any unstructured data, apply rules and transformations, and send to anywhere in any filetype.



## **RealTime Viewer (RTV) + Mimic Mode**

View documents in any filetype on demand from any data source, within any web or desktop client, without needing to rewrite the client or migrate. Bypasses legacy ECM, licensing, and external APIs.



## **MARS Watcher**

Locate any data issues and predict errors before beginning a migration, then proactively rectify in order to ensure a smooth migration with no interruptions to operations or user access.



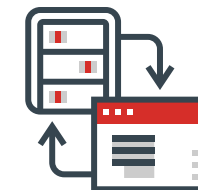
## **MARS Scanner**

Extract and structure data from physical documents by using any fax, imaging, or scanning device and sending scanned batches to MARS Scanner. Used for day-forward conversions.



## **Bill Presentment**

Retrieve, display, email, and reprint invoices, credit memos, bills and statements within any ECM, in addition to providing online user self-service. Commonly used in our Procure-to-Pay automation solution.



## **MARS Migration Server**

Single or multiple sources to single or multiple targets. Chain of custody / reconciliation. End-to-end encryption if required. Appliances available to handle migration.

**Bypass licensing, legacy ECM, and external APIs with all, some, or no file migration.**

# MARS RTV

## APPLICATION RETIREMENT

1. Standalone application where the admin can access all data, ideal for a war room approach.
2. Destination client plugin with specific date range for features within client and two searches:
  - a. Source search
  - b. Target search
3. RTV authentication gives the admin access to all reports, but limits specific users within client.
4. Target authentication gives CMOD or P8 target security.

5. CFS: federated approach with content integrator. Works with any source system and 45 different foreign repositories. You can federate and access thousands of repos at once.
6. Seamless usage in new client. We wrap your new client around the RTV API so that the user has no idea they aren't accessing the non-migrated data natively in the new client. Backend repositories merged in one hit list. Federated process for long-term use, not the transitional.
7. RTV and RTV Viewer: for federation, redaction support, and standardized annotations across the repository via our 45 different proprietary source extractors.

### RTV API options

1. **API additional security:** end-to-end encryption in motion and in rest supported.
2. **Mimic Mode:** addon for RTV API to create a wrapper around the API to mimic existing application.

# MARS WATCHER FEATURES

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Included Helix Viewer gives cross-repository annotation and redaction support.



GDPR compliance baked-in, enabled, and automated at scale.



Documents, content, and data scanning. Works with physical or digitized documents.



Receive and process files, new reports, documents, and scanned images.



Extracts / feeds from any sources: FTP, FTPS, SFTP, LPR, LPD, NDM, MQ, mounts, etc.



Predict frequency of exceptions and receive notifications of exceptions.



Ad hoc OCR, QR, and barcode recognition.



Alerts, document creation management, processing, and archiving features.



Reconciliation and processing features.



Document templates for reports include images, calculations, and design layouts.



API for day forward processing.



Generation of XML export files.

The Helix MARS Watcher: Watcher orchestrates the process of **identifying**, **transforming**, **indexing**, and **uploading** current documents into the destination ECM. The main concepts used by the Watcher system are:

- **Queue:** a named folder where input files arrive for processing.
- **Rule:** a named collection of instructions for processing an input file; a rule specifies which files to which it should apply, how the input file must be transformed and indexed, and where should the file go in the destination ECM.
- **Destination:** a named ECM application destination for the files processed by a rule.
- **Pipeline:** the process started for each input file that arrives to a queue.

# MIGRATION SECURITY

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## Normalize report formatting

Apply formatting rules via XML to AFP and PDF formats, including resources.



## Secure physical migration hardware

We optionally provide all appliances to complete a fully offline migration.



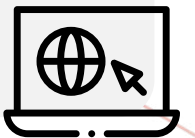
## Migration audits with chain of custody

We audit at each phase of migration plus a conversion audit at the end, all with full CoC.



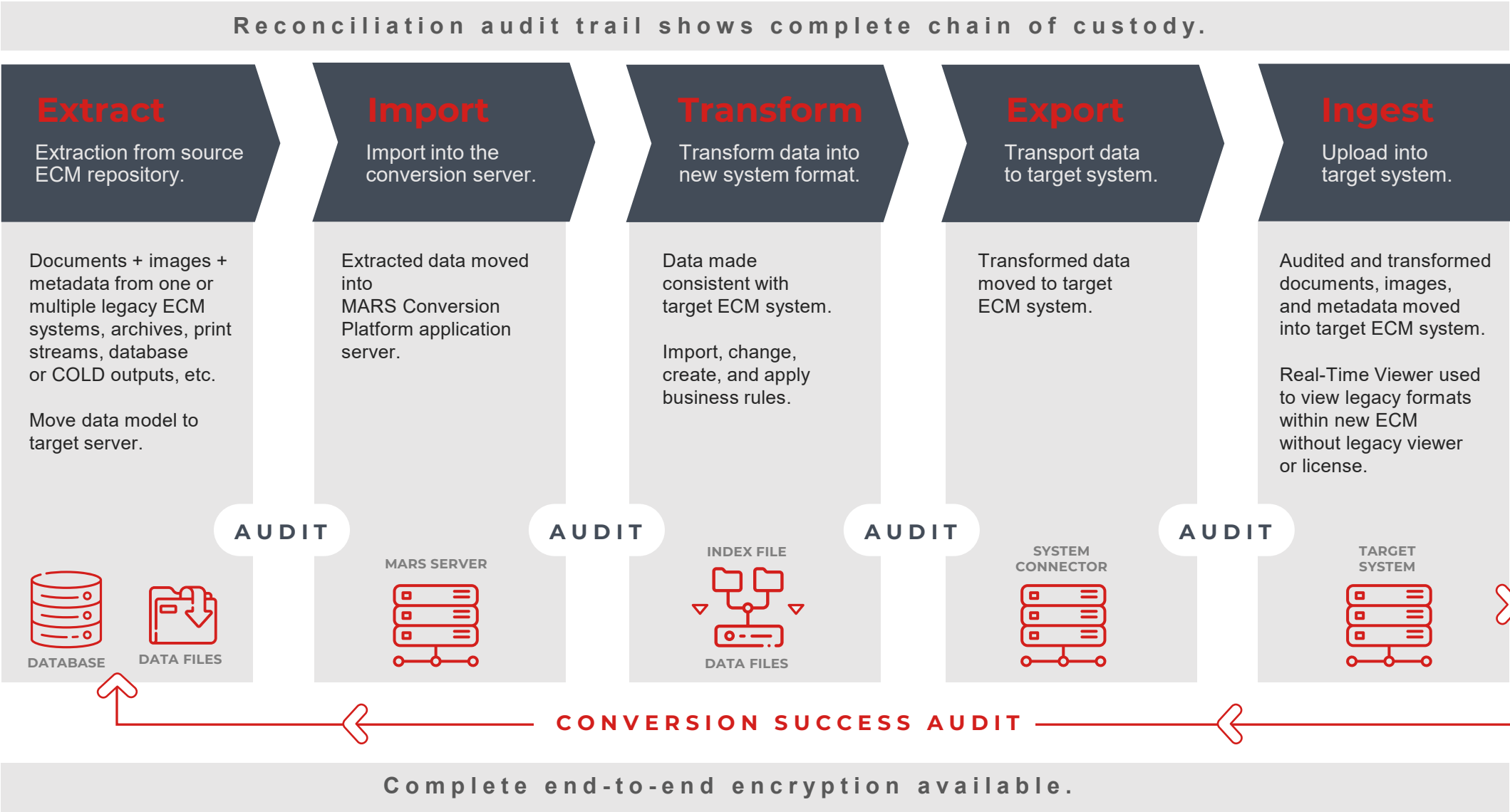
## End-to-end encryption

We optionally provide full end-to-end encryption for every phase of the migration.





# CONVERSION PROCESS BY PHASE



# UNIQUE QUALIFICATIONS

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We utilize our **custom proprietary MARS toolset** developed over decades of enterprise ECM + ETL projects and leveraging our deep product and service subject matter expertise.

**Highly efficient and versatile framework** for automating the conversion of data and filetypes, from any and to any.

**Automates conversion of** reports, print streams, data structures, and associated metadata across multiple disparate content repositories.

**MARS creates an XML wrapper for data streams**, allowing creation of new documents with it. Convert, print, redact, email or view.

**View an archive version of a report** directly from the archive, without having to migrate it.

**Convert utilizing the repository's APIs with our extractors** or directly access your data.

**Extracts from many sources:** FTP, FTPS, SFTP, LPR, LPD, NDM, MQ, mounts, and more.

# RESULTS

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**80%**



cost reduction by eliminating manual document processing.

**Seconds**



to complete sales orders and payments, instead of days.

**Save**



millions in the first month by retiring legacy license fees.

**Improved**



internal communication & CS by centralizing data.

**Increased**



working capital, no human supervision required.

**100%**



data accuracy with touchless automation.

# KEY BENEFITS

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Retire legacy ECM / viewer licenses and reduce server costs, with or without migration

## Consolidate

**Problem:** customer has billions of files of content and archives, business automation rules, inconsistent file formats, and multiple programs in their ECM solution—expensive to upkeep and a nightmare to migrate.

**Solution:** MARS connects to every data source, pulls and automatically combines fragmented data across files, filetypes, and file sources, and imports existing BA rules.

## Retire Licenses

**Problem:** customer is locked into an expensive legacy ECM and viewer license. A full migration would cost the same as a license renewal, so the customer keeps delaying a critically needed long-term solution.

**Solution:** MARS migrates frequent-access data to a new ECM and uses RTV APIs to maintain access to archive files without migrating. Legacy ECM and viewer are no longer needed.

## Reduce Costs

**Problem:** customer is spending excessive amounts of money on data centers needed to service their fragmented enterprise content. Redundant data is scattered across files and departments.

**Solution:** MARS combines disparate data into single documents based on metadata and optimizes archive data for efficient storage. Storage requirements reduced by 50% or more.

# USE CASES

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• Manufacturers • Distributors • FMCG • F&B • Retail • Healthcare • Finance • IT

## Fix Data Silos

**Problem:** customer has millions of files in different image, document, and text formats scattered across various companies, departments, physical servers, cloud servers, CRMs, programs, and tools.

**Solution:** MARS connects to every data source, pulls and automatically combines fragmented data across files, filetypes, and file sources.

## Auto-Rebrand

**Problem:** customer needs to rip the old logo, letterhead, colors, font, mailing address, and email address from 30 years' worth of documents and replace with the updated branding and content.

**Solution:** MARS copies the customer's existing business rules, allows easy adjustments within a simple UI, then automatically applies the updates everywhere.

## Better Reports

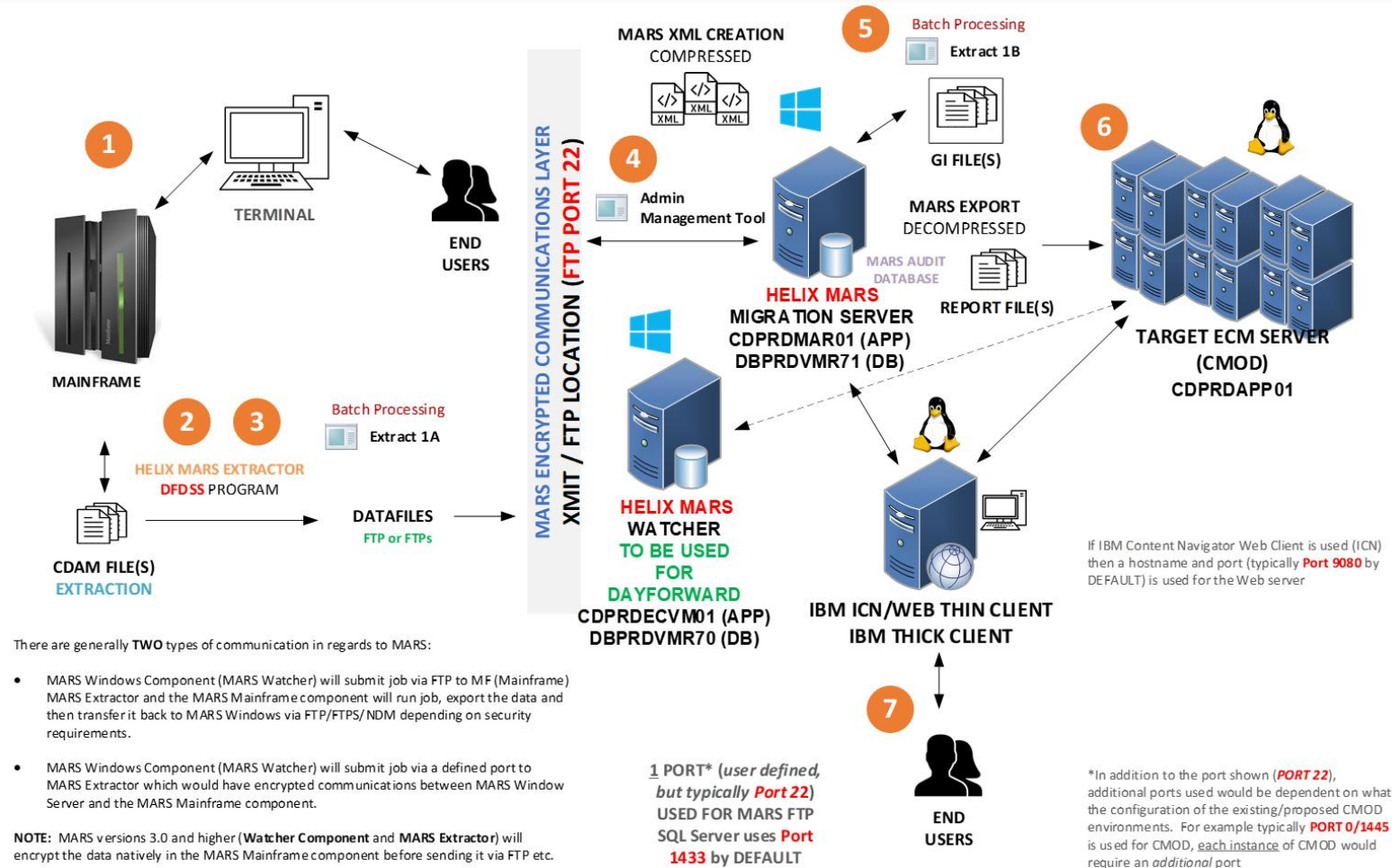
**Problem:** customer wants to make one new report acting as a single source of truth combining data from text, Office files, PDFs, scanned written documents, some old hard drives, and a legacy ECM + ERP platform.

**Solution:** MARS identifies all files and outputs across all sources containing relevant data via their metadata and creates a new report file combining the target data.

# CASE STUDY



Retired ASG Mobius license, migrated to IBM CMOD with RTV as **license-free viewer** working within new ECM + ERP via RESTify API



**800 TB+**

of compressed data  
extracted and migrated

**\$5M+**

saved in first year in license  
fees and cloud costs

**1,500+**

discrete data sources  
located and extracted from

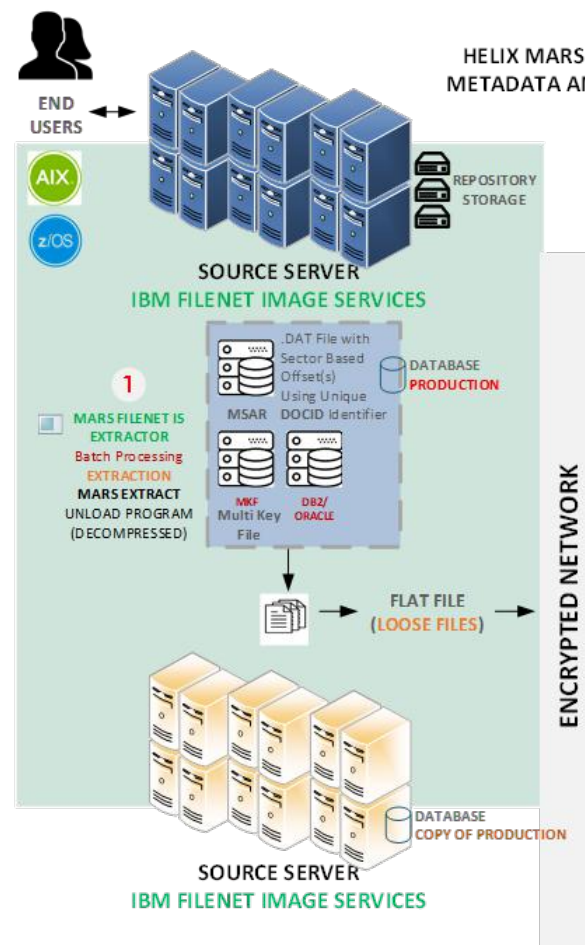


# CASE STUDY

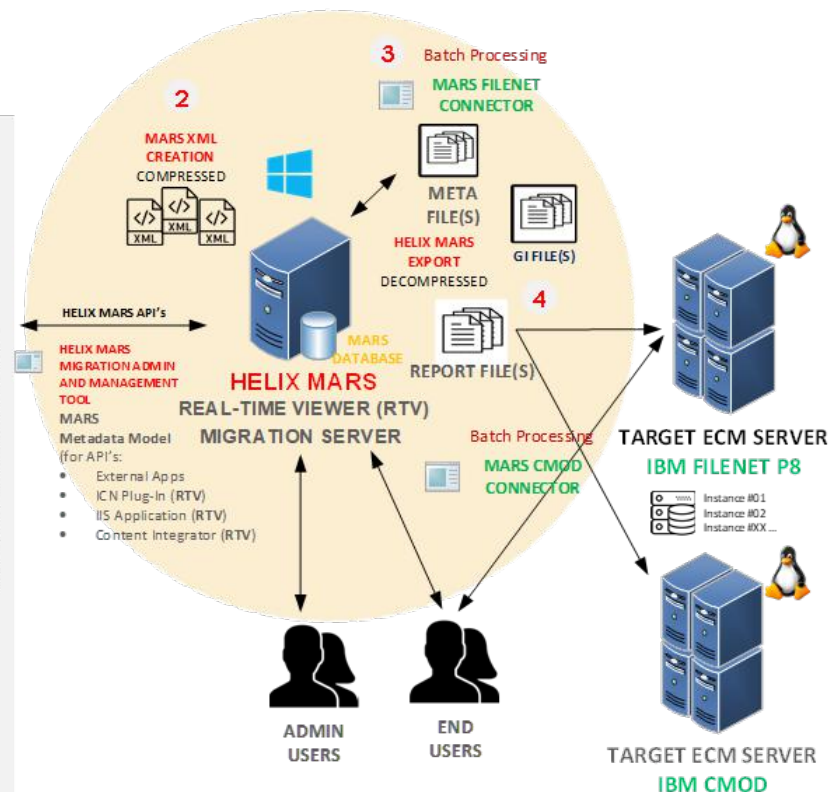


Australian Bank

Retired IBM Image Services, consolidated extensive variety of line types into one new ECM solution on IBM FileNet P8 with full data migration



## HIGH LEVEL PRODUCTION MIGRATION HELIX MARS RTV FILENET IMAGE SERVICES ENVIRONMENT OVERVIEW METADATA AND OBJECT FILE MIGRATION – FULL MIGRATION - WITH RTV



95 TB+

of compressed data  
extracted and migrated

2.4B+

total unique documents  
condensed and migrated

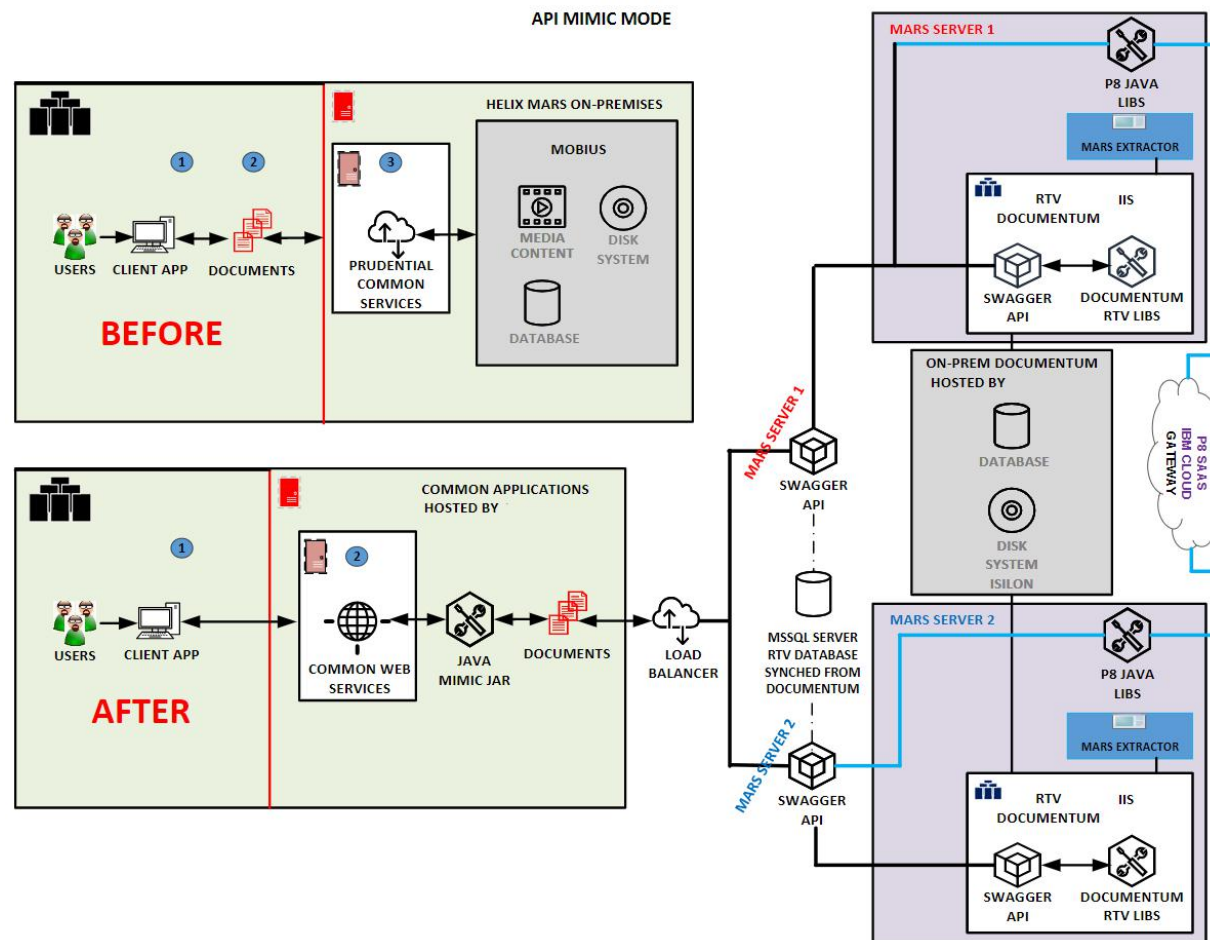
11 months

from signing to project  
completion, including pilot



# Fortune 500 Insurance Company

Retired a legacy Opentext Documentum license giving **access to the original repository utilizing RTV** for documents from Documentum and Filenet P8 via RTV APIs



of compressed data  
extracted and migrated

saved in first year in license fees and one data center closed

pages indexed and mapped  
to new Filenet P8 solution

# OUR CLIENTS

**You're in  
experienced hands,  
just like these Helix  
International clients**

From Fortune 500 companies to startups, from banks and hospitals to insurance and construction companies, **Helix International has helped smart organizations cut costs, streamline processes, and take control of their enterprise data.**



Anthem  Excellus  Postbank 

Sanlam  REGIONS  citibank 

UBS  LLOYDS BANK  BANK OF AMERICA 

PRUDENTIAL  CAESARS  ENTERTAINMENT  westpac

CENTURION  Santander  CATERPILLAR® 

# Thank You



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