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ECM for the Masses

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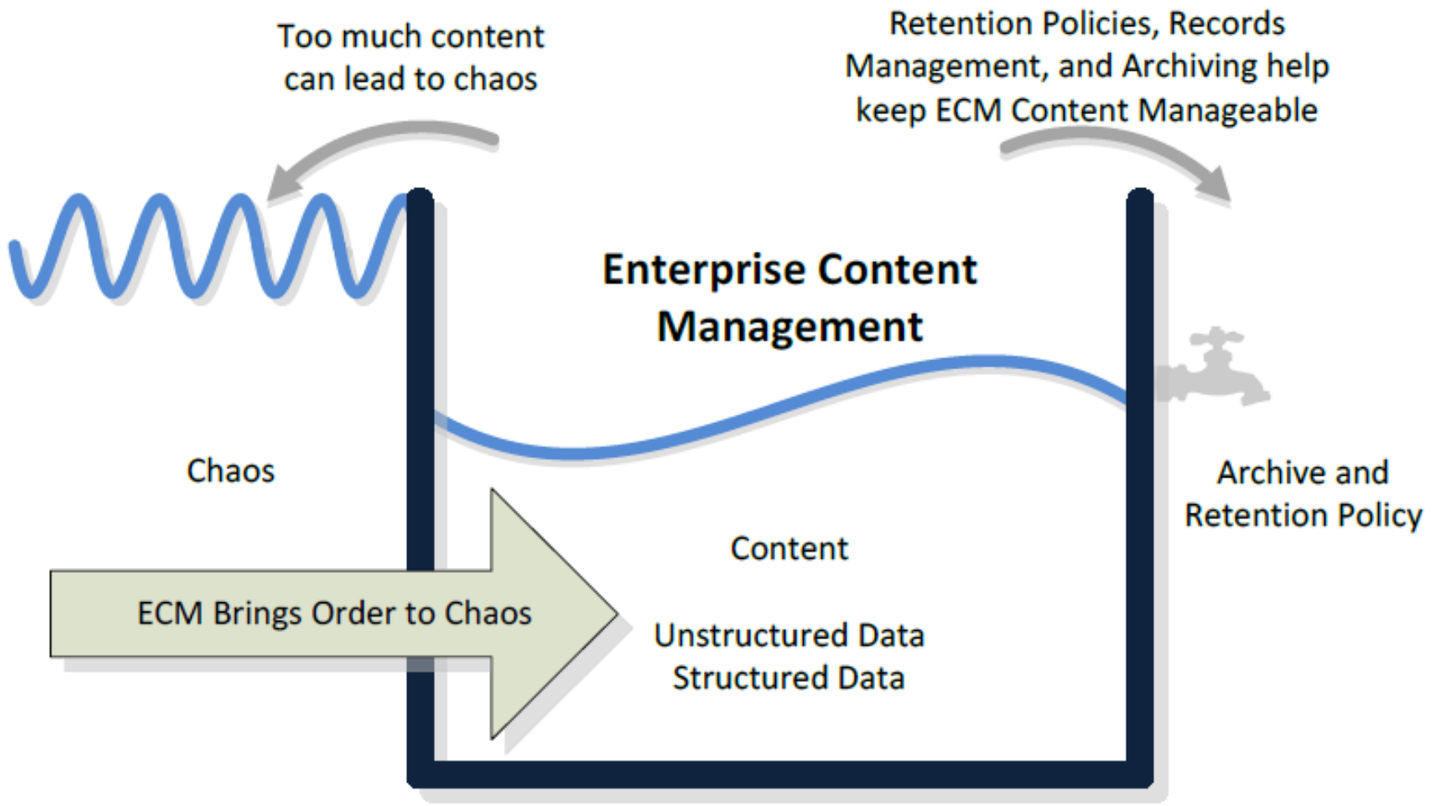
What is ECM?



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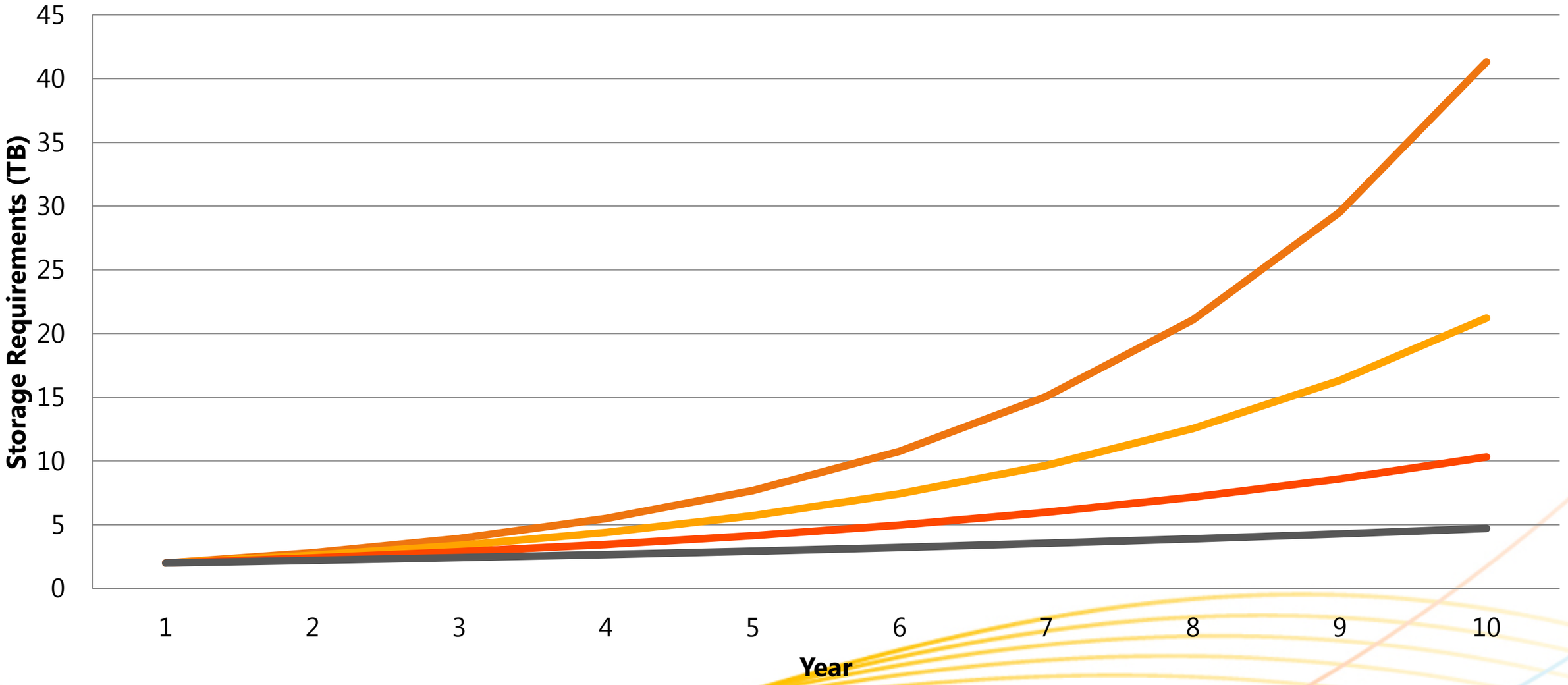
Manage the Unmanaged



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Agenda

Adoption

Compliance

Cost Effective

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Adoption

User Engagement and Empowerment

Consumerization of Productivity Services

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Infrastructure Limitations

Protect intellectual property

Security

Governance policies

Enterprise Level

Consumer Level

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High Cost of Participation

- Huge burden on the content creator
  - Creators have little stake in the outcome; short attention span
- A dis-integrated process
  - Records custodians have little knowledge of the content; out of context
  - ECM always an after thought

- Results
  - Little participation
  - Low compliance

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Return on User Investment - RoUI

- Improved User Interaction
- Improved navigation
- Improved search
- Improved management

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Adoption Plan

- Address ECM across the entire content lifecycle model
- Engage the content creator; the one with the best knowledge of the content
- Integrate ECM activities into the productivity tools so the actions are transparent and unobtrusive
- Support formal and informal classification and tagging
- Automate, automate, automate

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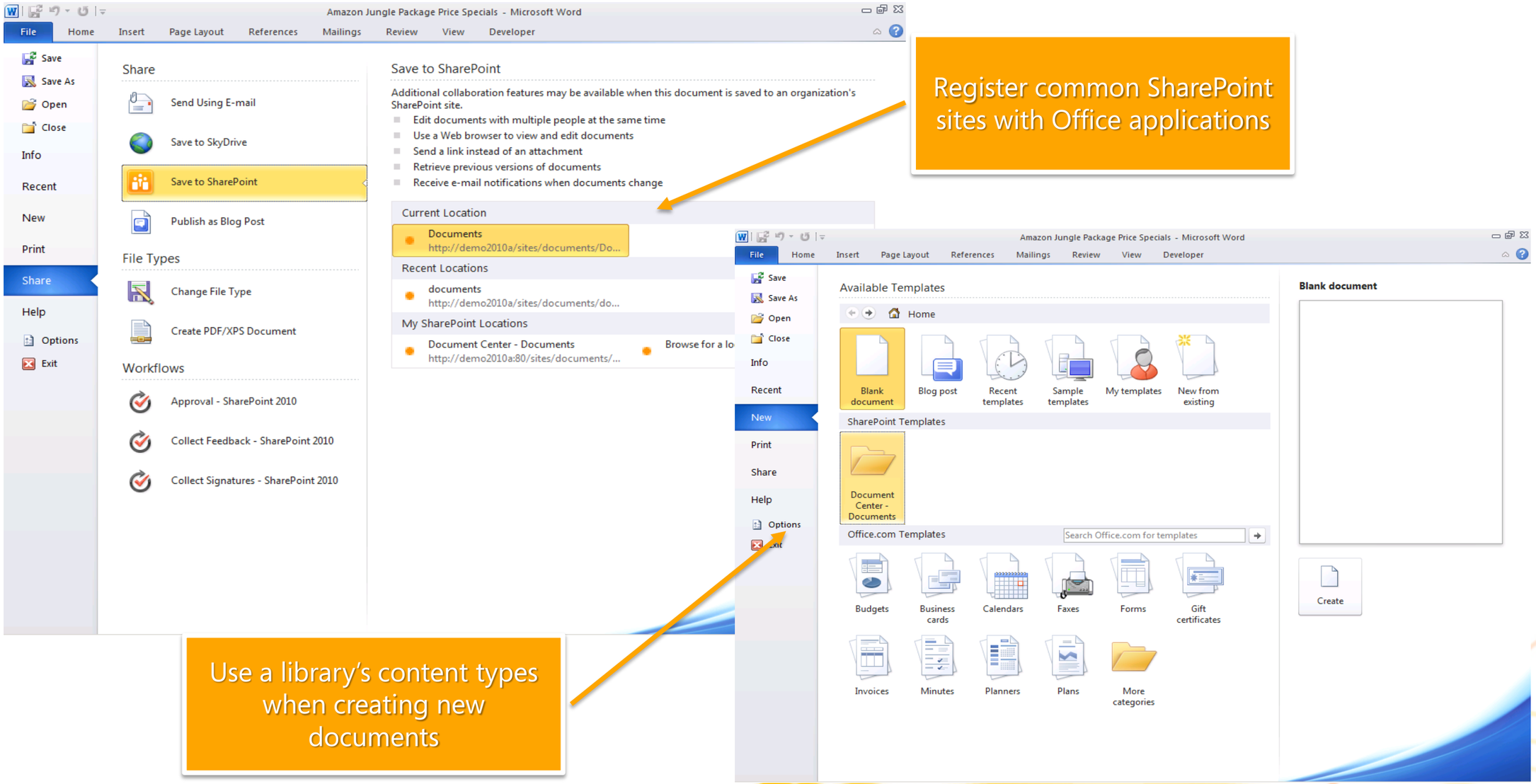
Starts with Creation



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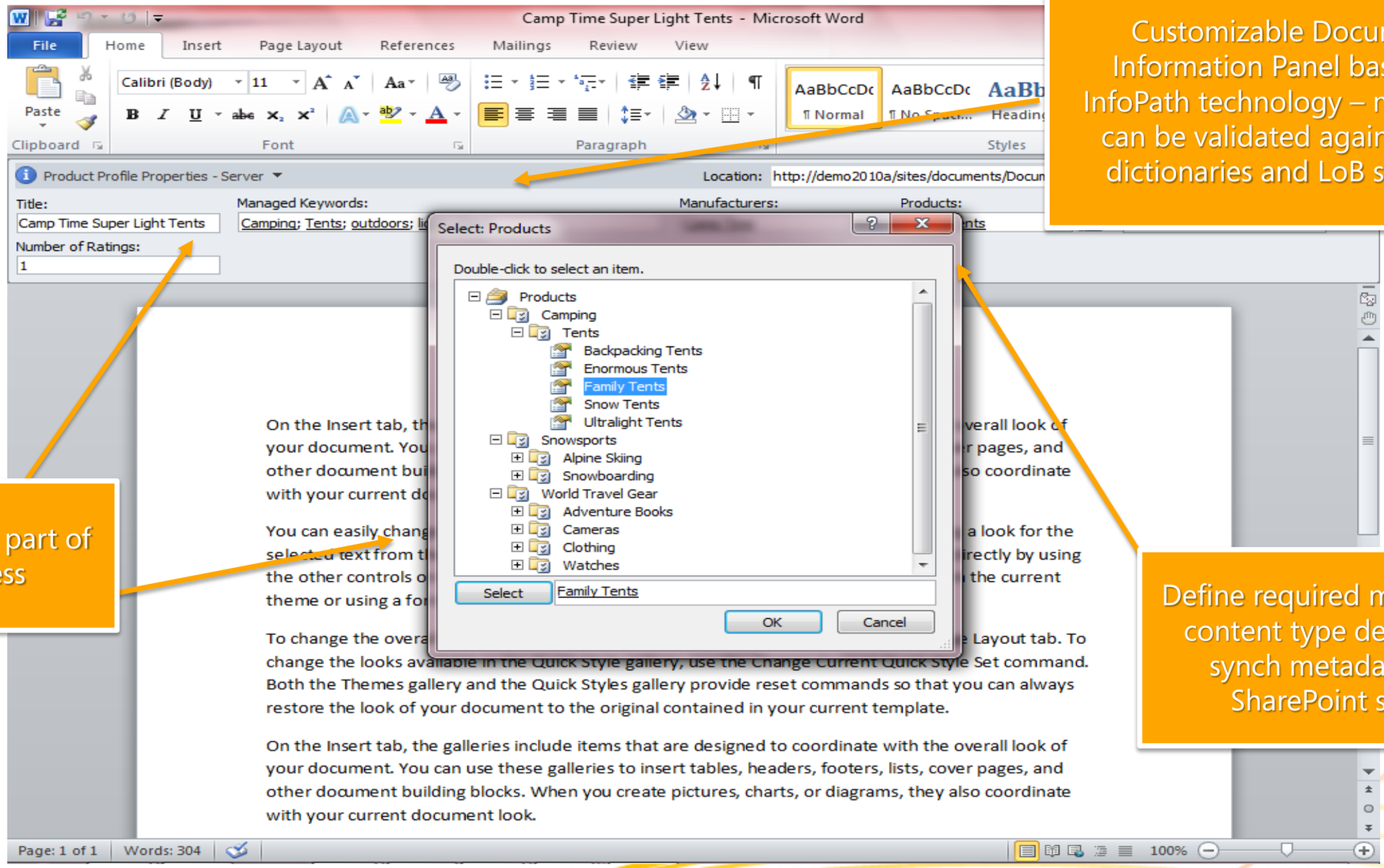
Capture Metadata During Authoring



Customizable Document Information Panel based on InfoPath technology – metadata can be validated against data dictionaries and LoB systems

Capture metadata as part of authoring process

Define required metadata in content type definition – synch metadata with SharePoint server

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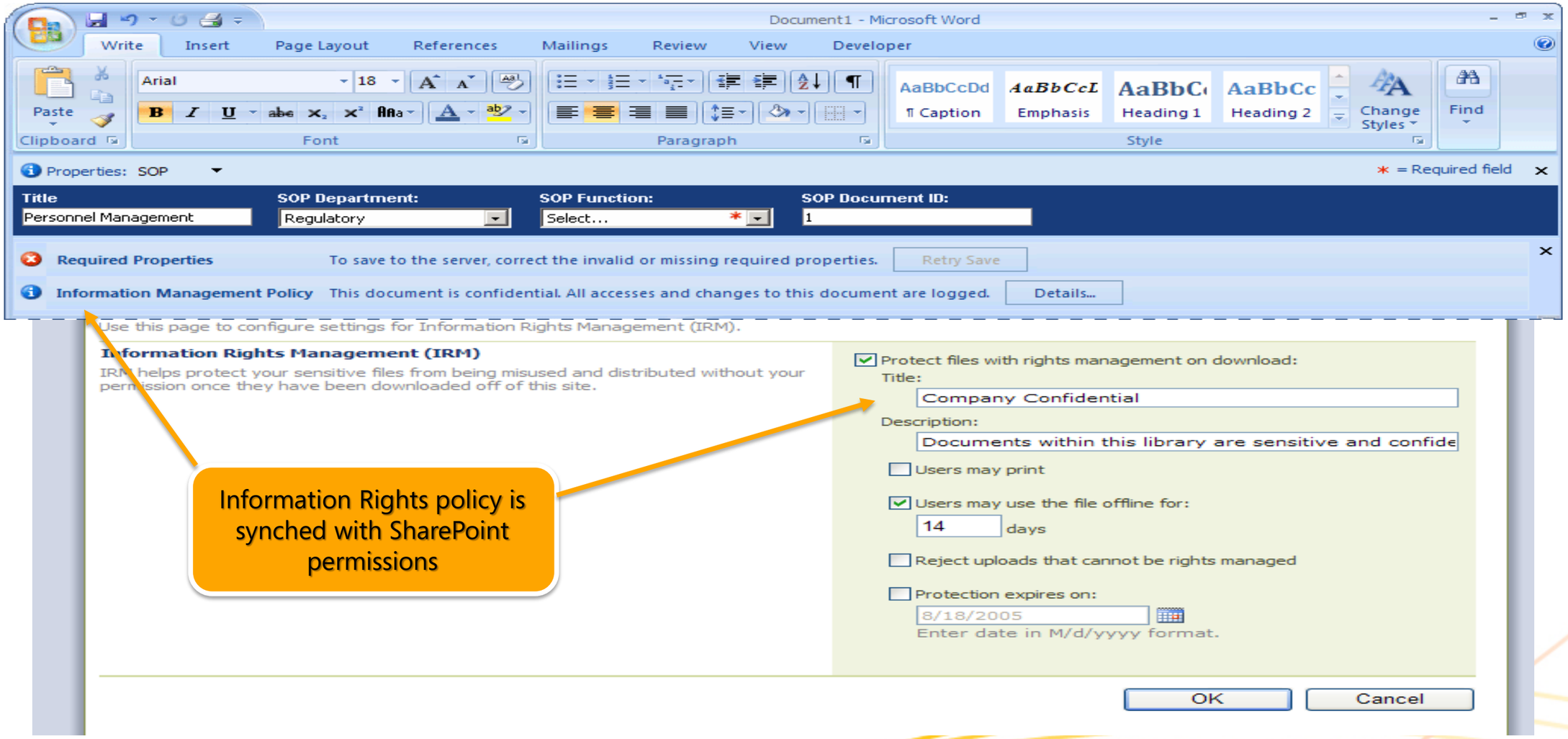
Protect the IP in the Document



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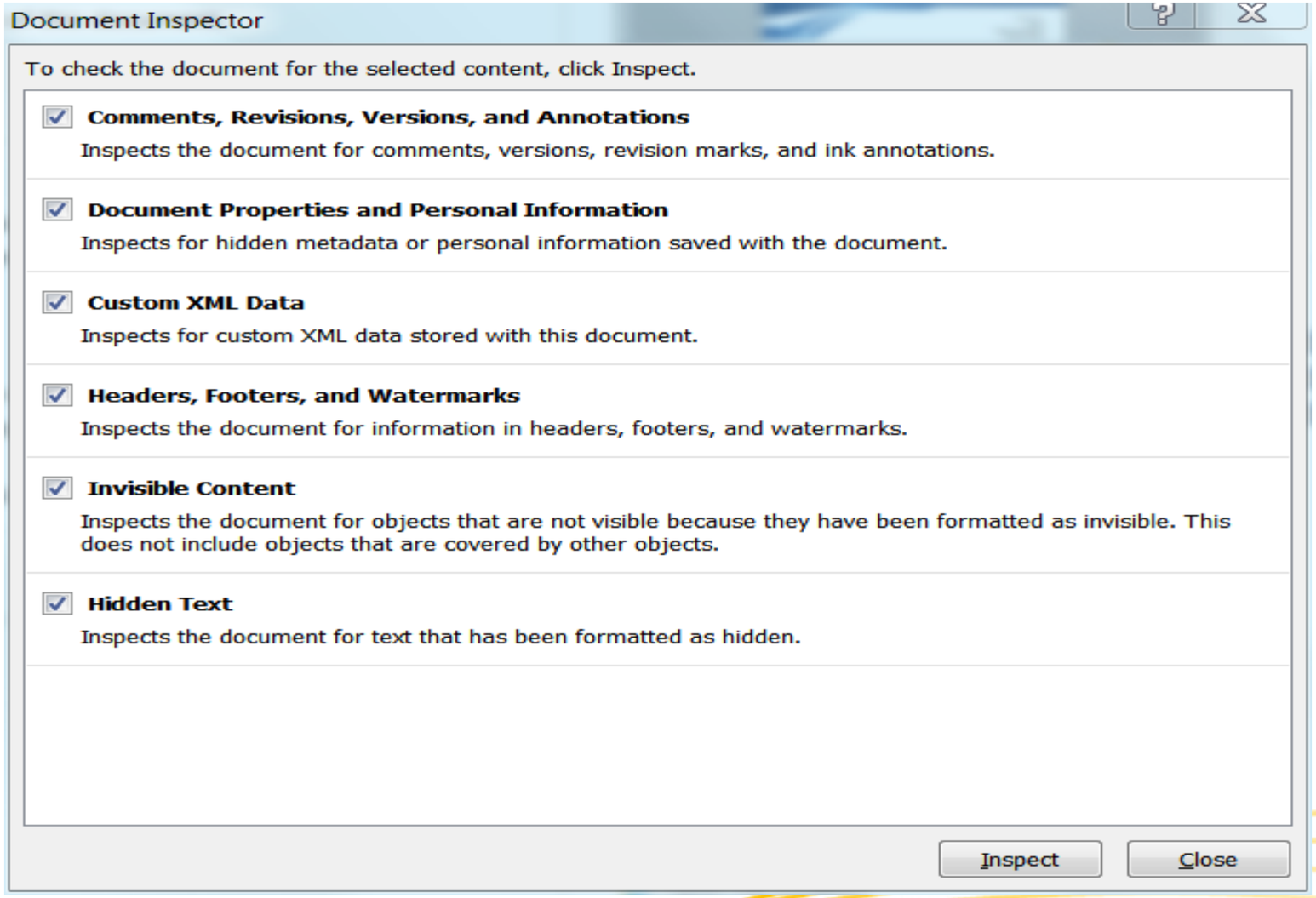
Inspect and Remove Embedded Data



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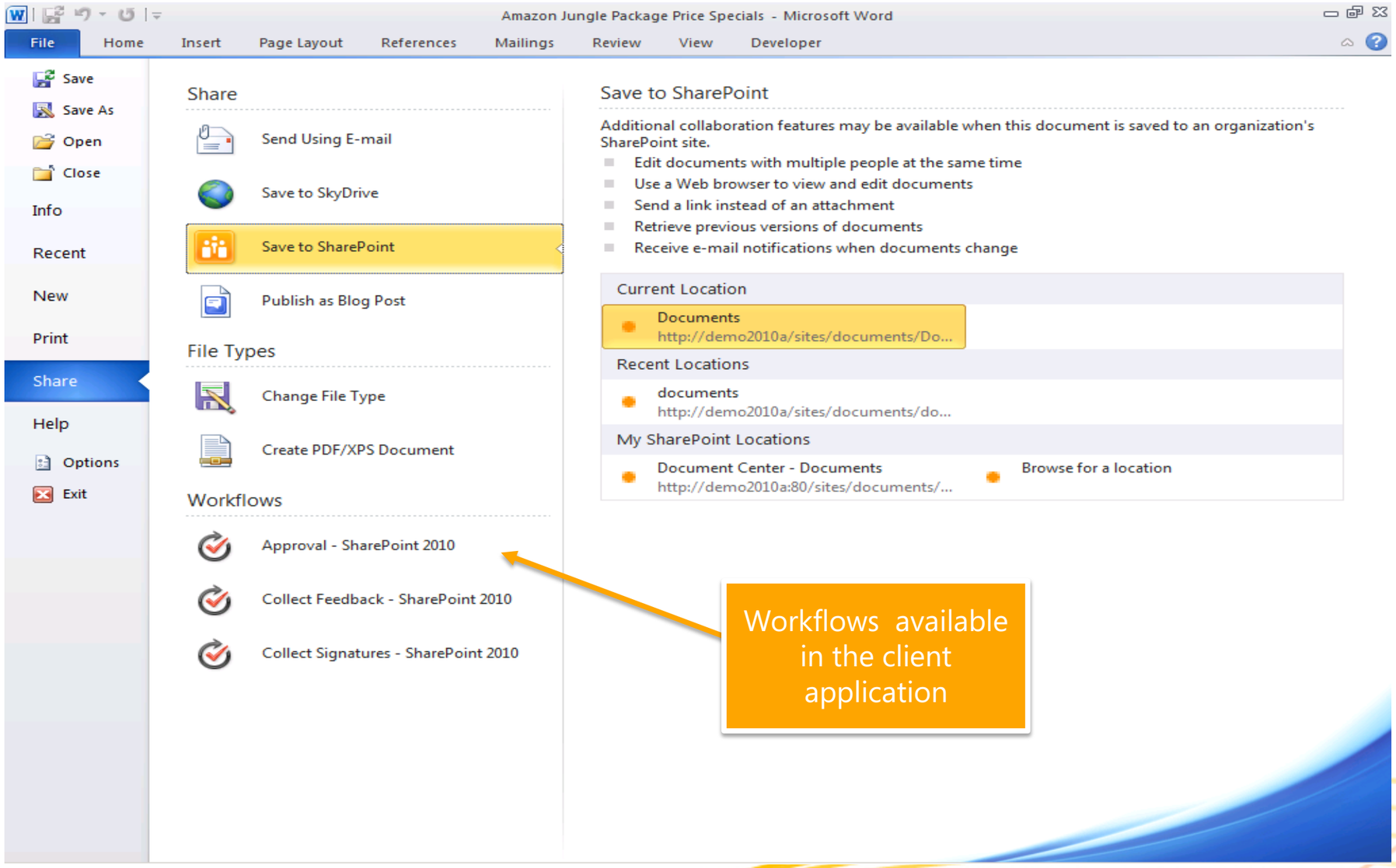
Integrated Workflow



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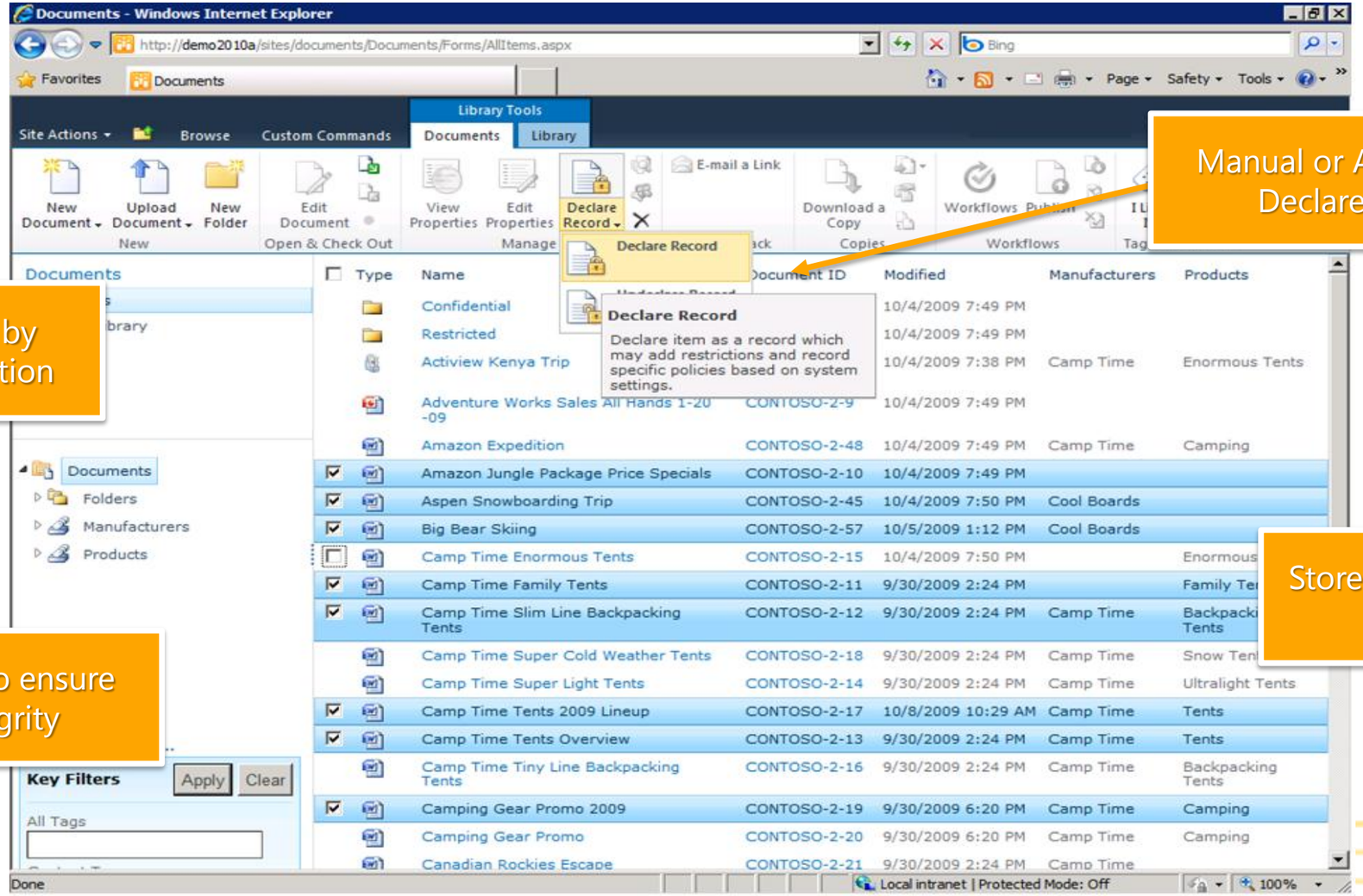
Store Documents In Place or the Repository



Manual or Automatically Declare Records

Customize policies by content type or location

Store multiple record types including e-mail

Vault behavior to ensure content integrity

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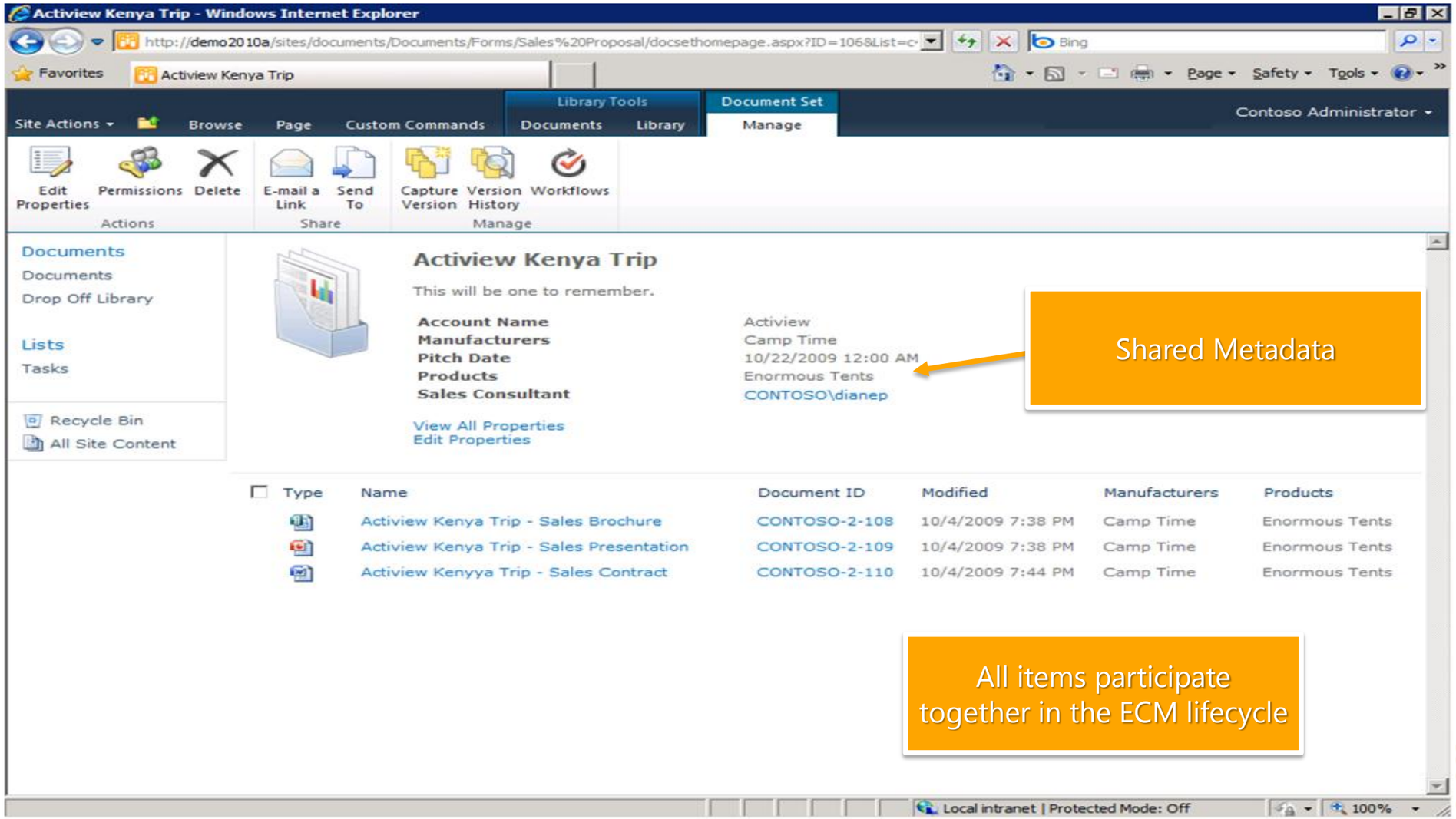
Document Set Management



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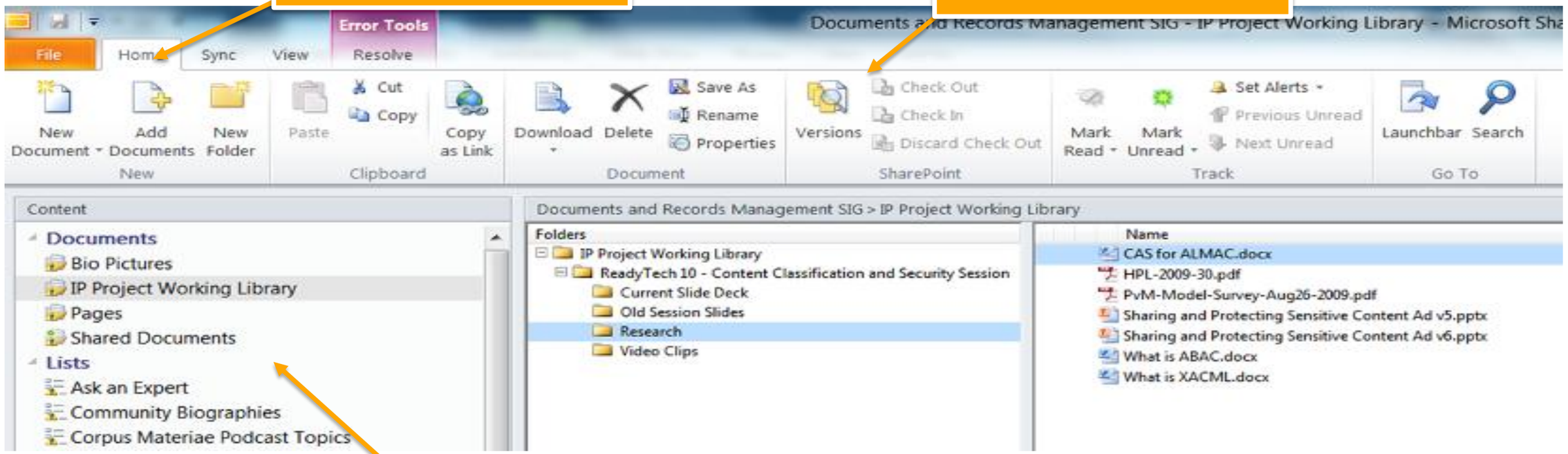
Enable Offline Access

All content creation and editing actions are available

All versions and metadata are available



Full offline access to all synched content

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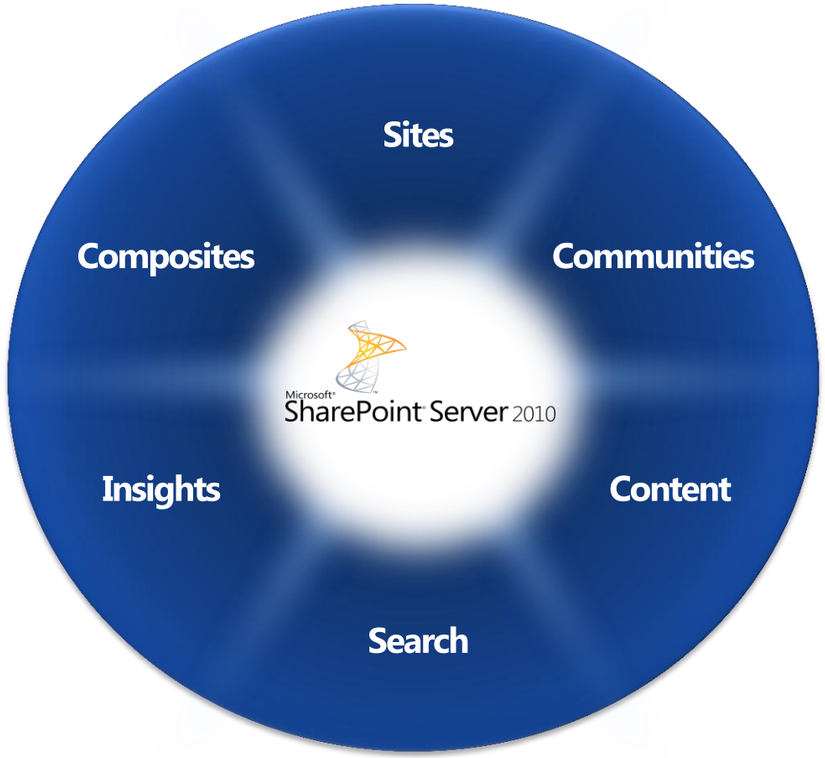
Integrate with Other Enterprise Workloads



ECM workload activities should be designed into every solution such as:

- Business Intelligence,
- Social/Community Solutions,
- Composite Applications,
- Collaboration Sites, etc.

Users should not be aware that ECM is taking place

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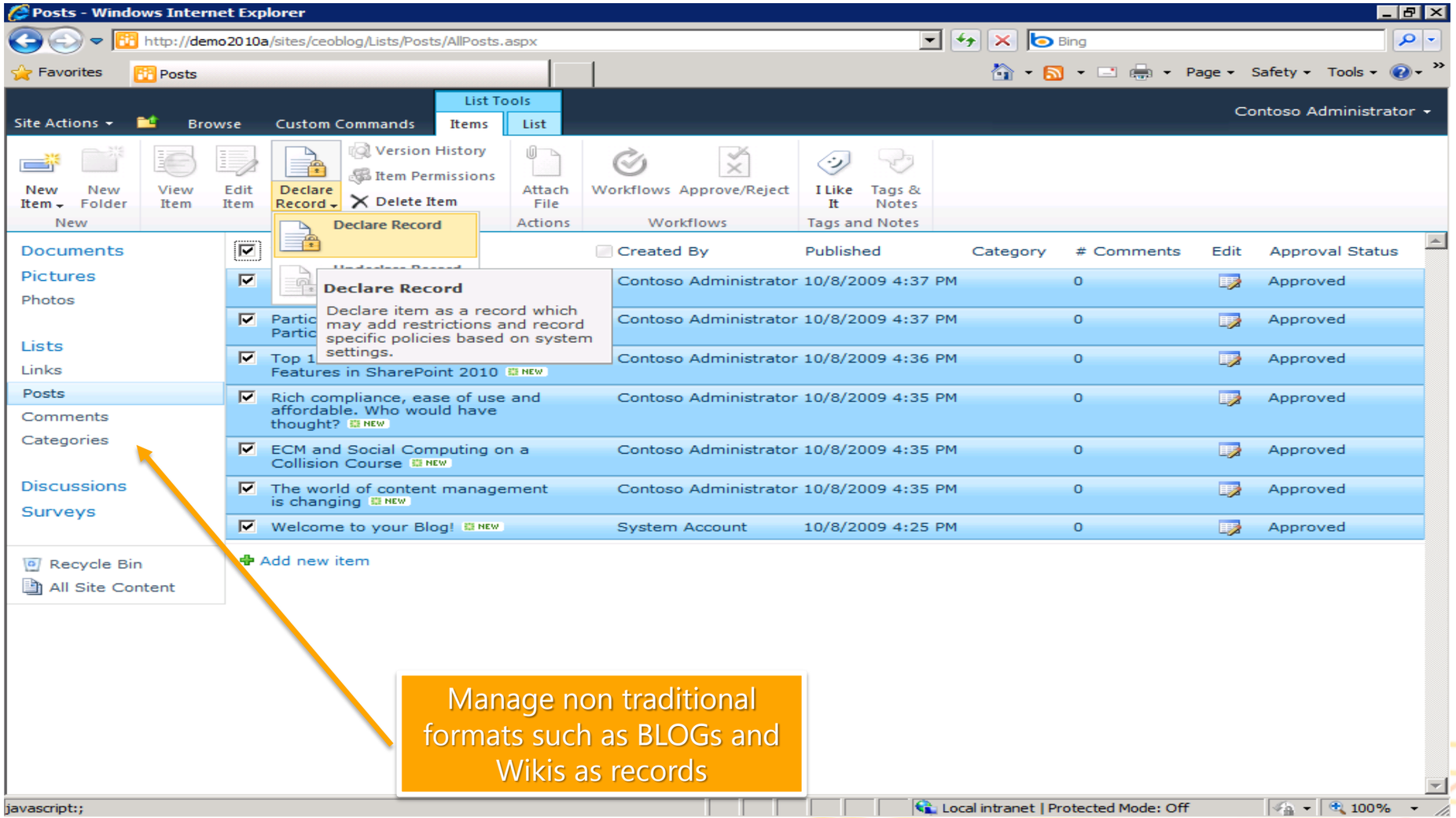
Support for Nontraditional Content Sources / Formats



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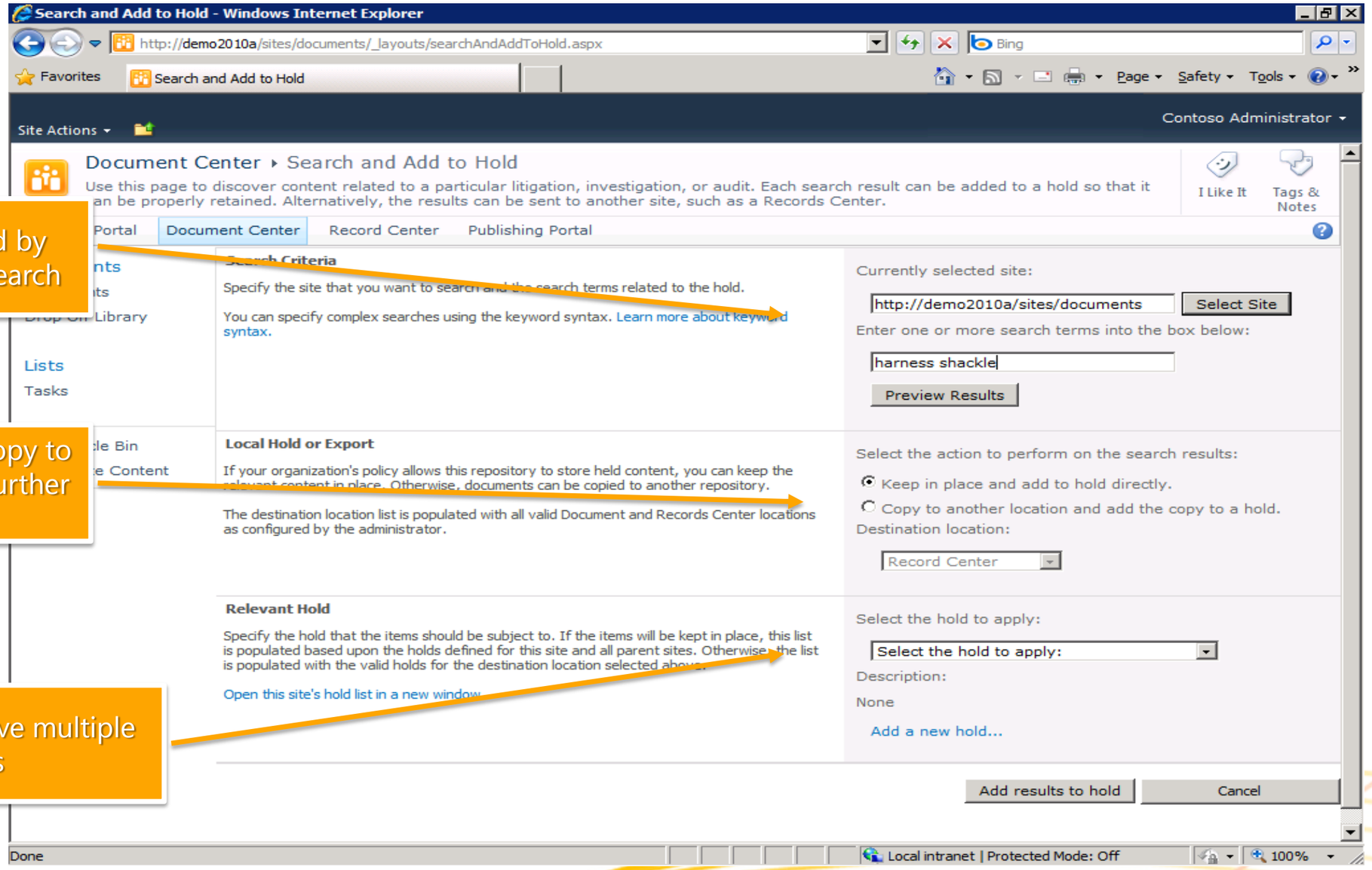
Discovery and Preservation

Discovery supported by SharePoint or FAST Search

Preserve in place or copy to another location for further processing

Content can have multiple holds



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Other Key Office 2010 Adds…

- Taxonomies and Folksonomies
- Metadata-driven navigation
- Persistent unique DocId's
- Content Organizer
- Native Support for Remote Blob Storage
- Office Web Applications
- Concurrent Authoring
- Word Automation Services
- and so much more….

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Key Success Criteria

- Start ECM with File → New
- Simplify all user activity until ECM tasks are imperceptible
- Don’t require overt actions or decisions from the user
- Complexity is the ultimate enemy of adoption and compliance

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Compliance

Choice, Flexibility, and Coverage

Choice

- SharePoint can be configured and extended to comply with practically any standard
- You choose which ones apply without carrying the complexity and user burden for those that don't

Gemeente Nieuwegein heeft eerste SharePoint 2010 DMS/RMA conform NEN2082

5 maart 2010

PerfectView partner QNH heeft voor de Gemeente Nieuwegein een Document Management Systeem (DMS)/Record Management Applicatie (RMA) geïmplementeerd op basis van SharePoint 2010. Het bijzondere aan de implementatie is dat deze getoetst is door ECB en voldoet aan de eisen van "NEN2082 in het gebruik".

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Flexibility

- You choose how you comply… configuring the solutions to work the way your organization works (or even a specific business unit) while meeting the standards

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Coverage

- You choose to what degree you comply; many standards have provisions that may not apply to your business or that are “addressable” (optional)

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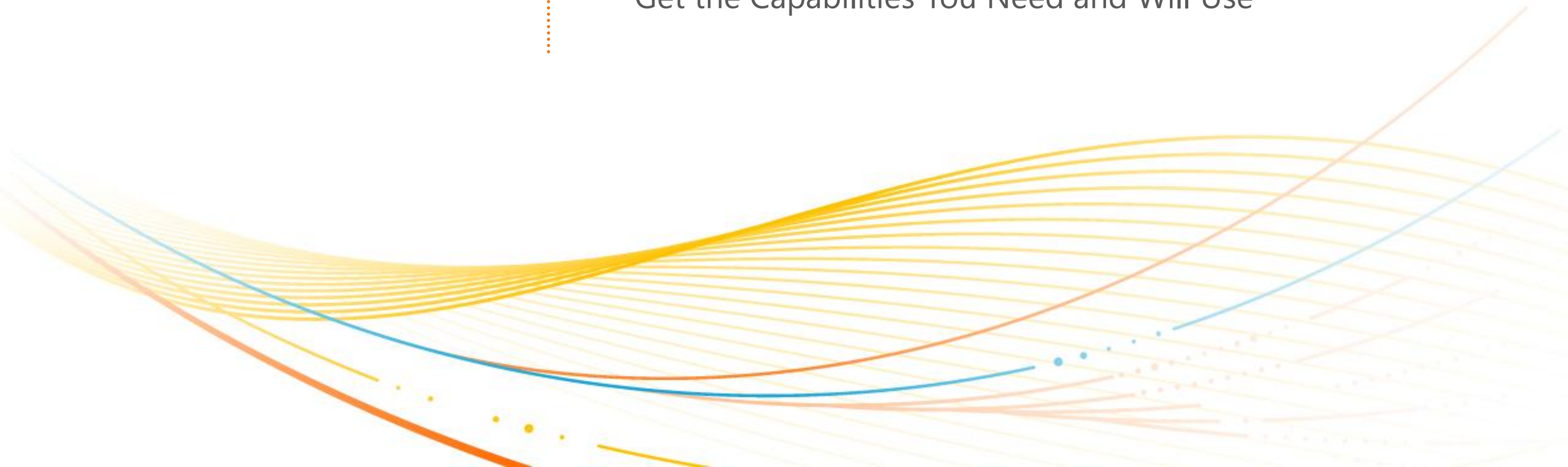
Cost Effective

Get the Capabilities You Need and Will Use



Foundational ECM Capabilities

- By design Microsoft ships those ECM capabilities that meet 80%+ of our customers needs
- We make those capabilities a premium experience and apply our driving principles around adoption and compliance
- We don’t ship capabilities that are specific to one industry, one region, or one standard
- We bring enterprise scale…multi-terabytes; millions and millions of items

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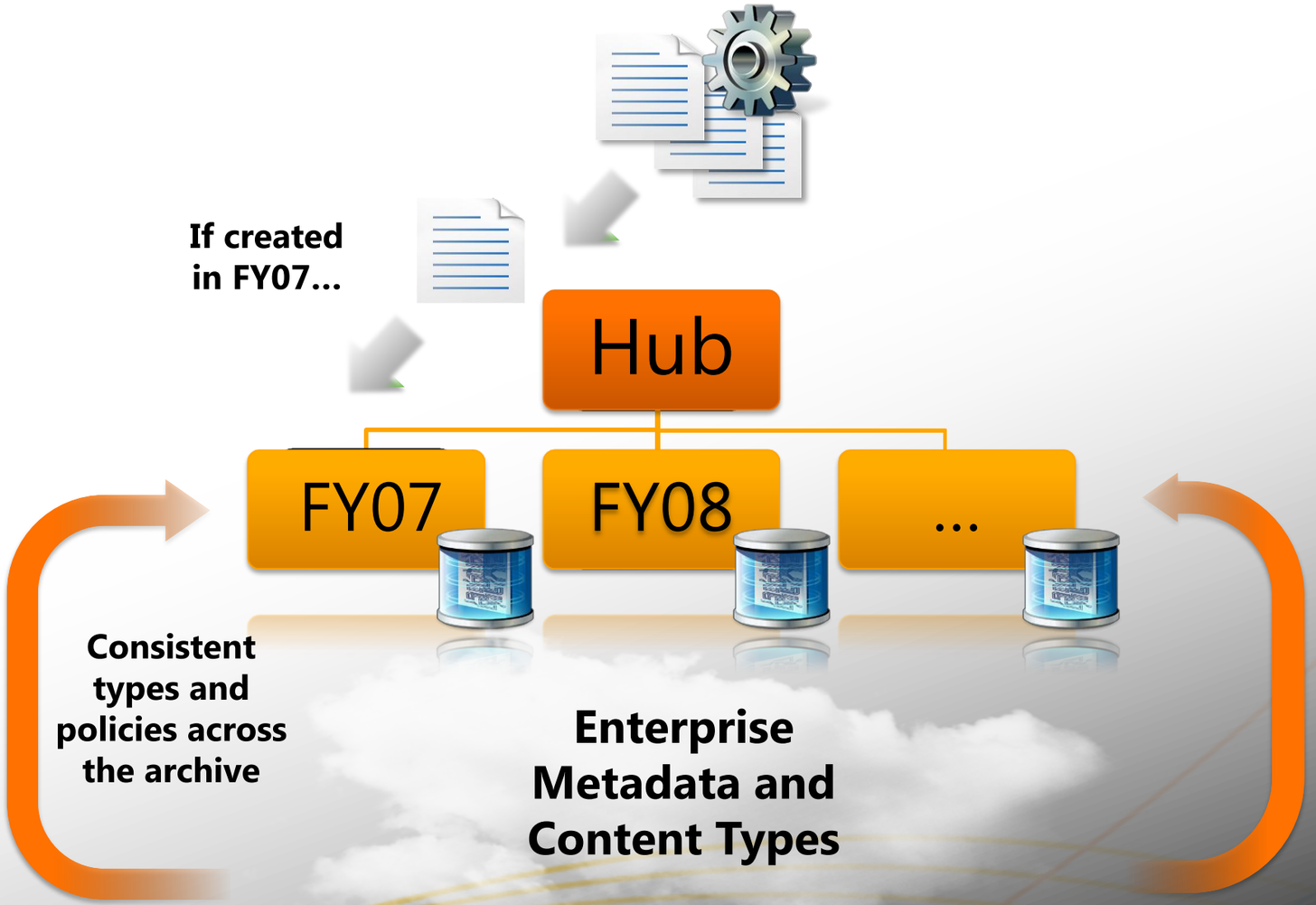
Massive, Distributed Archive

- Scale is achieved with a distributed architecture
- Content organizer can route content to correct site collection in the archive
- Content type syncing enables central management of distributed archive
- FAST search is used to retrieve content



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Resources

1. SharePoint Content (http://sharepoint.microsoft.com/en-us/product/capabilities/content/Pages/Content-Management-System.aspx)
2. Enterprise Content Management in SharePoint Server 2010 (http://technet.microsoft.com/nl-nl/sharepoint/ee263905.aspx)
3. Records Management in SharePoint Server 2010 (http://technet.microsoft.com/nl-nl/sharepoint/ff598594.aspx)
4. ECM Team Blog (http://blogs.msdn.com/b/ecm/)

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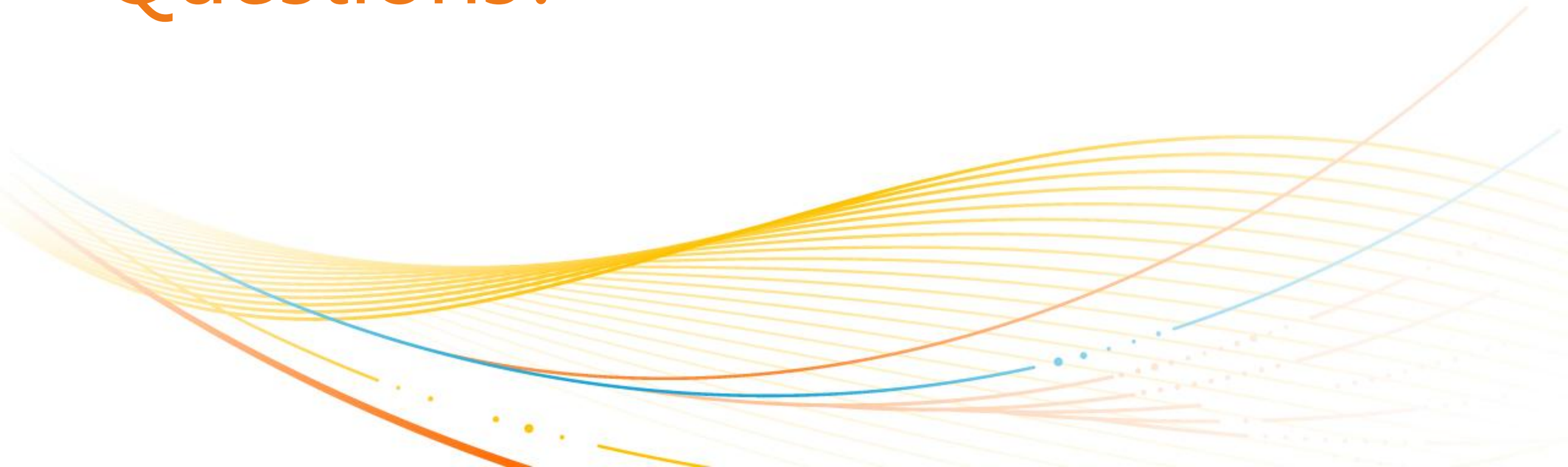
Questions?



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