

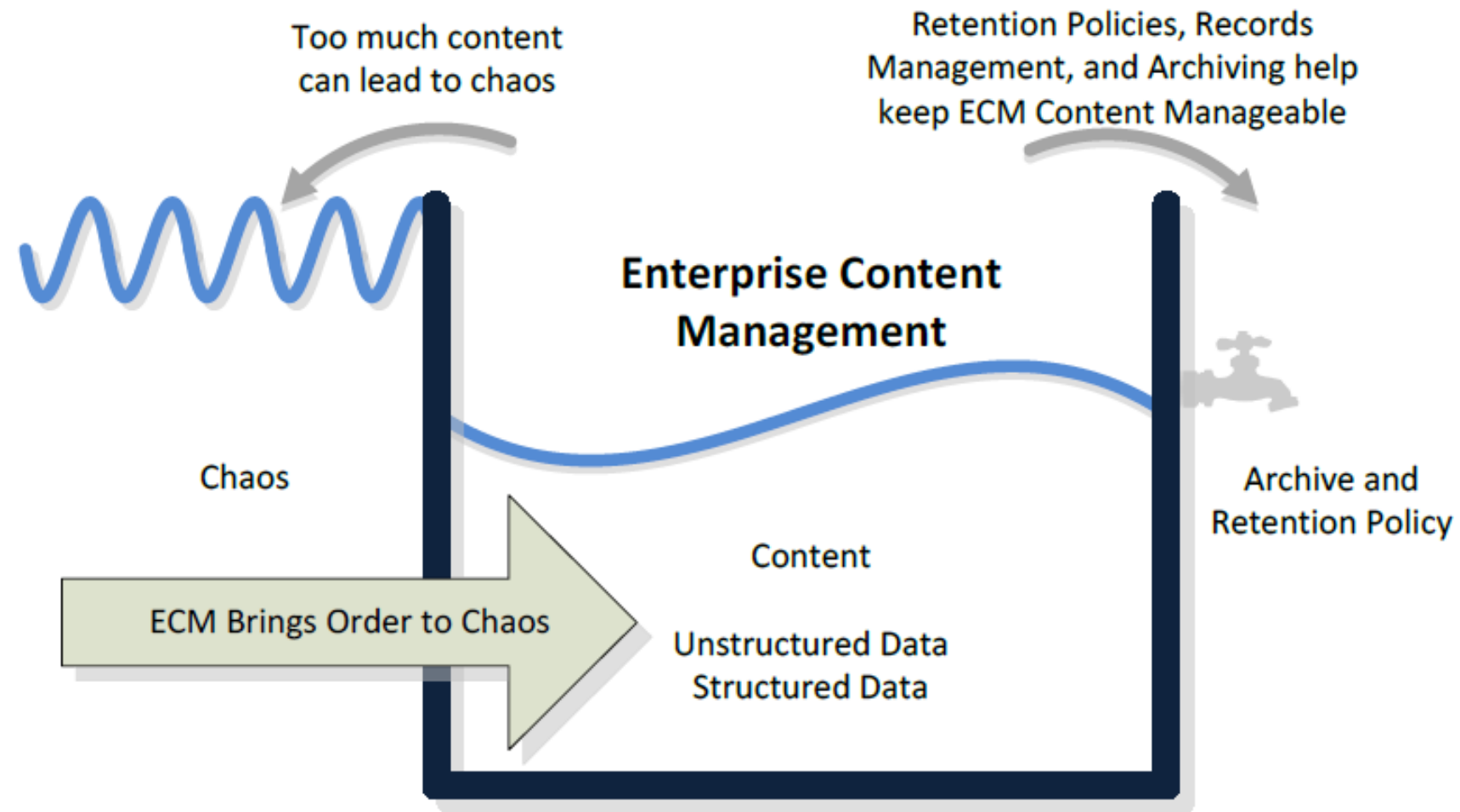


# ECM for the Masses

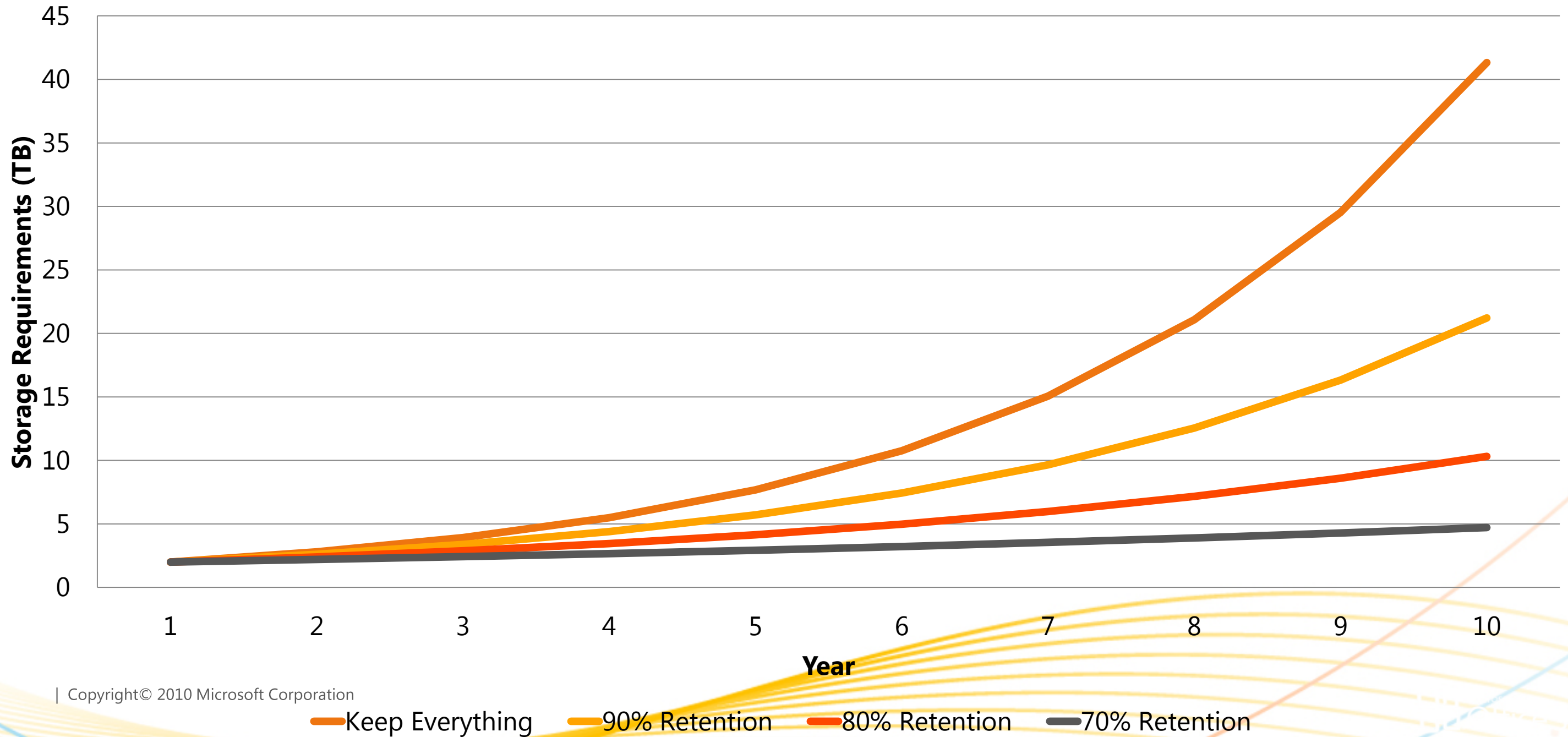
Jules Hoppenbrouwers  
SharePoint Specialist  
Microsoft Netherlands



# What is ECM?



# Manage the Unmanaged



# Agenda

Adoption

Compliance

Cost Effective



# Adoption

User Engagement and Empowerment





# Consumerization of Productivity Services



**Infrastructure  
Limitations**

**Protect  
intellectual  
property**

**Security**

**Governance  
policies**



**Enterprise Level**



**Consumer Level**

# 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



# Return on User Investment - RoUI

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

# 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

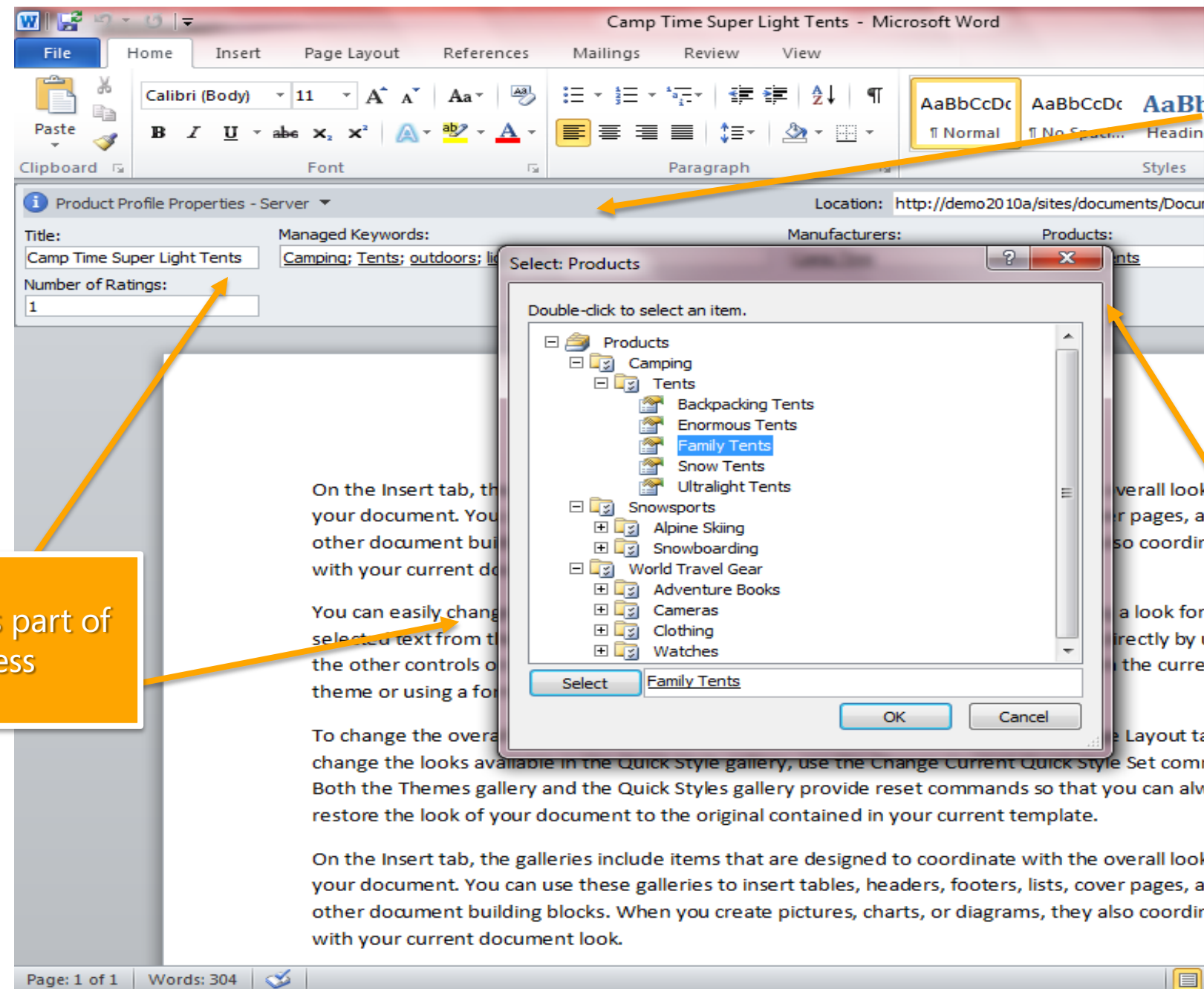
# Starts with Creation

The screenshot displays the Microsoft Word 2010 interface with the 'File' tab selected. The left sidebar shows the 'Share' button highlighted. The main area is divided into sections: 'Share' (with options like 'Send Using E-mail', 'Save to SkyDrive', 'Save to SharePoint', 'Publish as Blog Post'), 'File Types' (with 'Change File Type' and 'Create PDF/XPS Document'), and 'Workflows' (with 'Approval - SharePoint 2010', 'Collect Feedback - SharePoint 2010', and 'Collect Signatures - SharePoint 2010'). The 'Save to SharePoint' section is expanded, showing 'Current Location' (Documents), 'Recent Locations' (documents), and 'My SharePoint Locations' (Document Center - Documents). An orange arrow points from the 'Save to SharePoint' section to a text box. Another orange arrow points from the 'Options' button in the bottom-left corner to a text box.

Register common SharePoint sites with Office applications

Use a library's content types when creating new documents

# Capture Metadata During Authoring

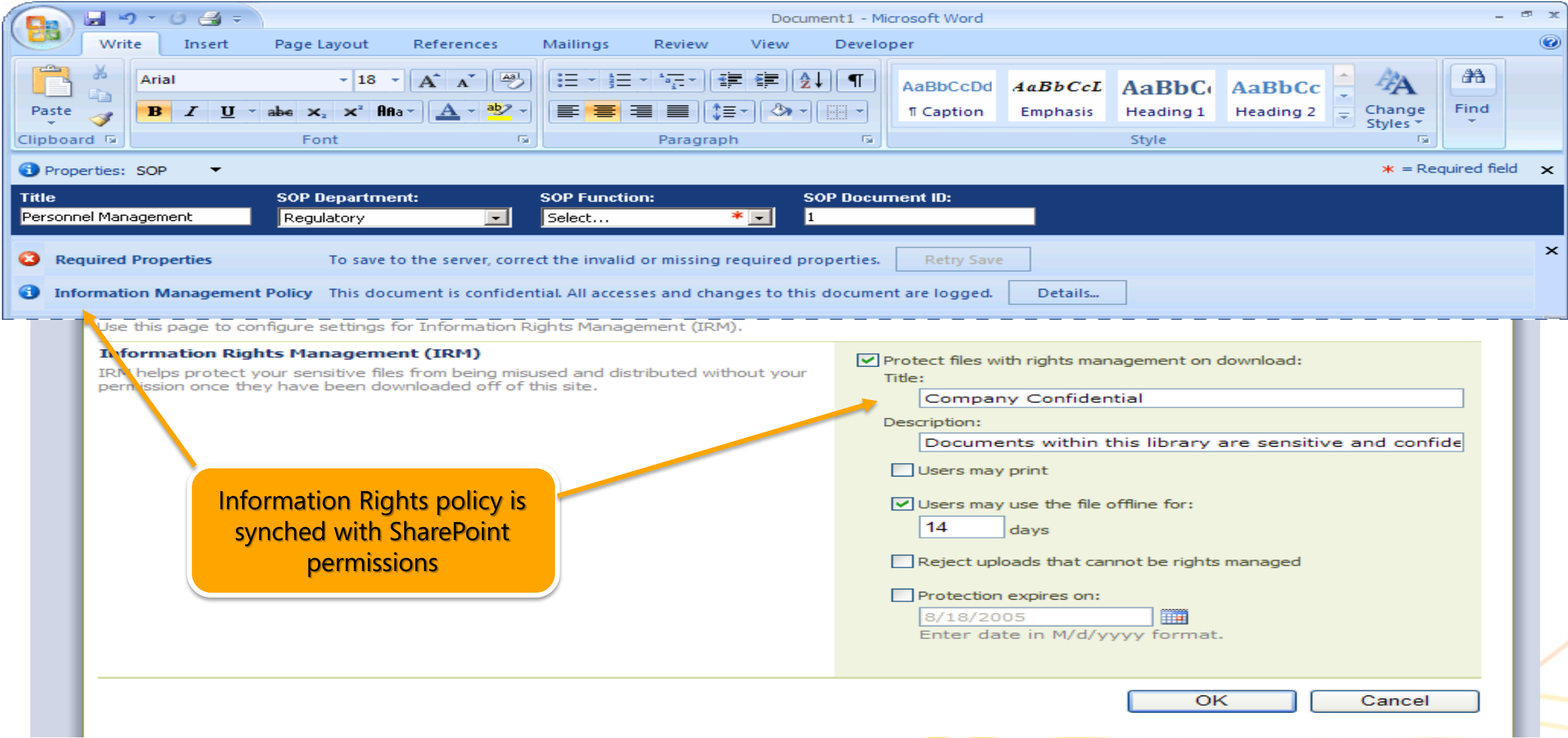


Customizable Document Information Panel based on InfoPath technology – metadata can be validated against data dictionaries and LoB systems

Capture metadata as part of authoring process

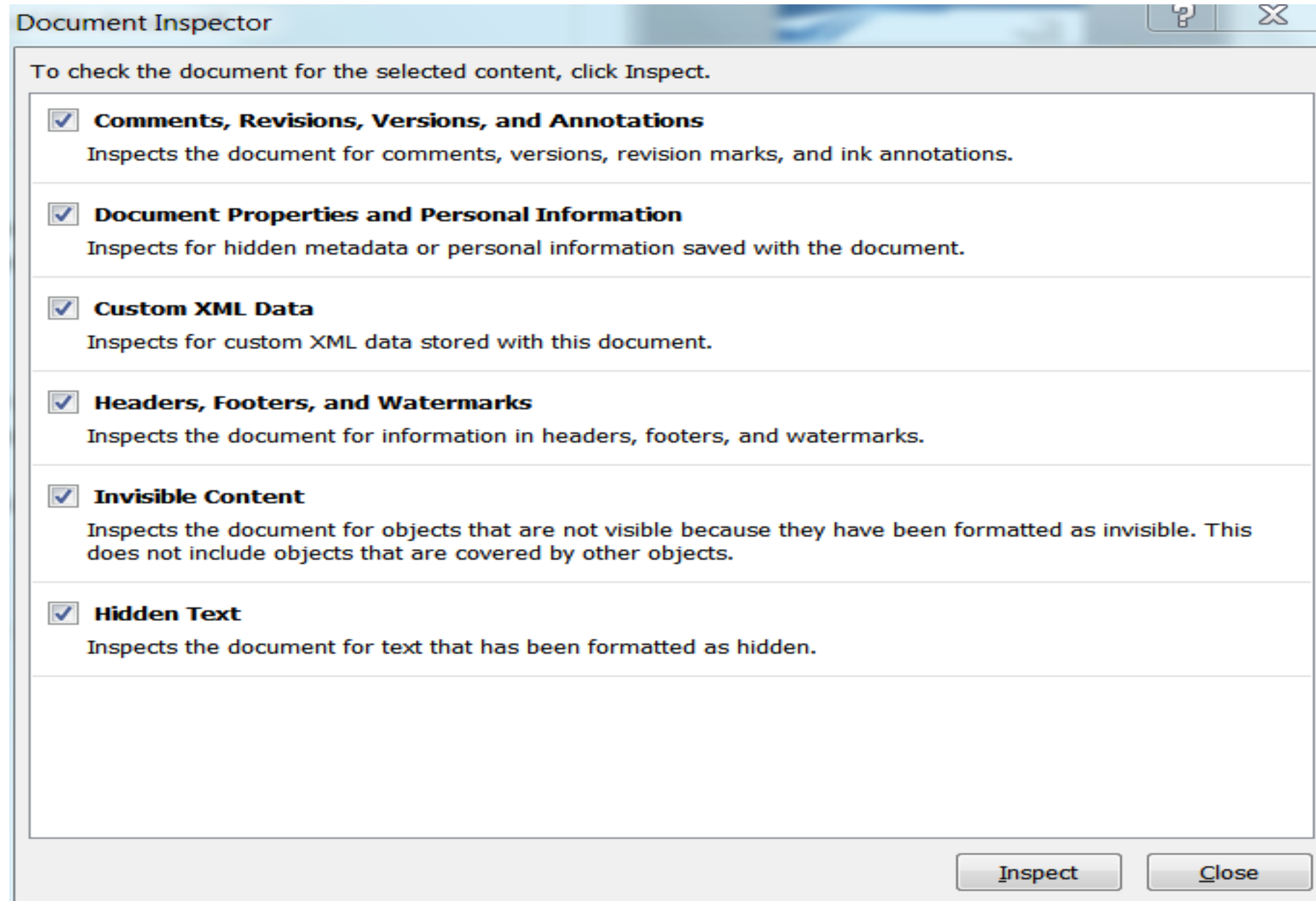
Define required metadata in content type definition – synch metadata with SharePoint server

# Protect the IP in the Document

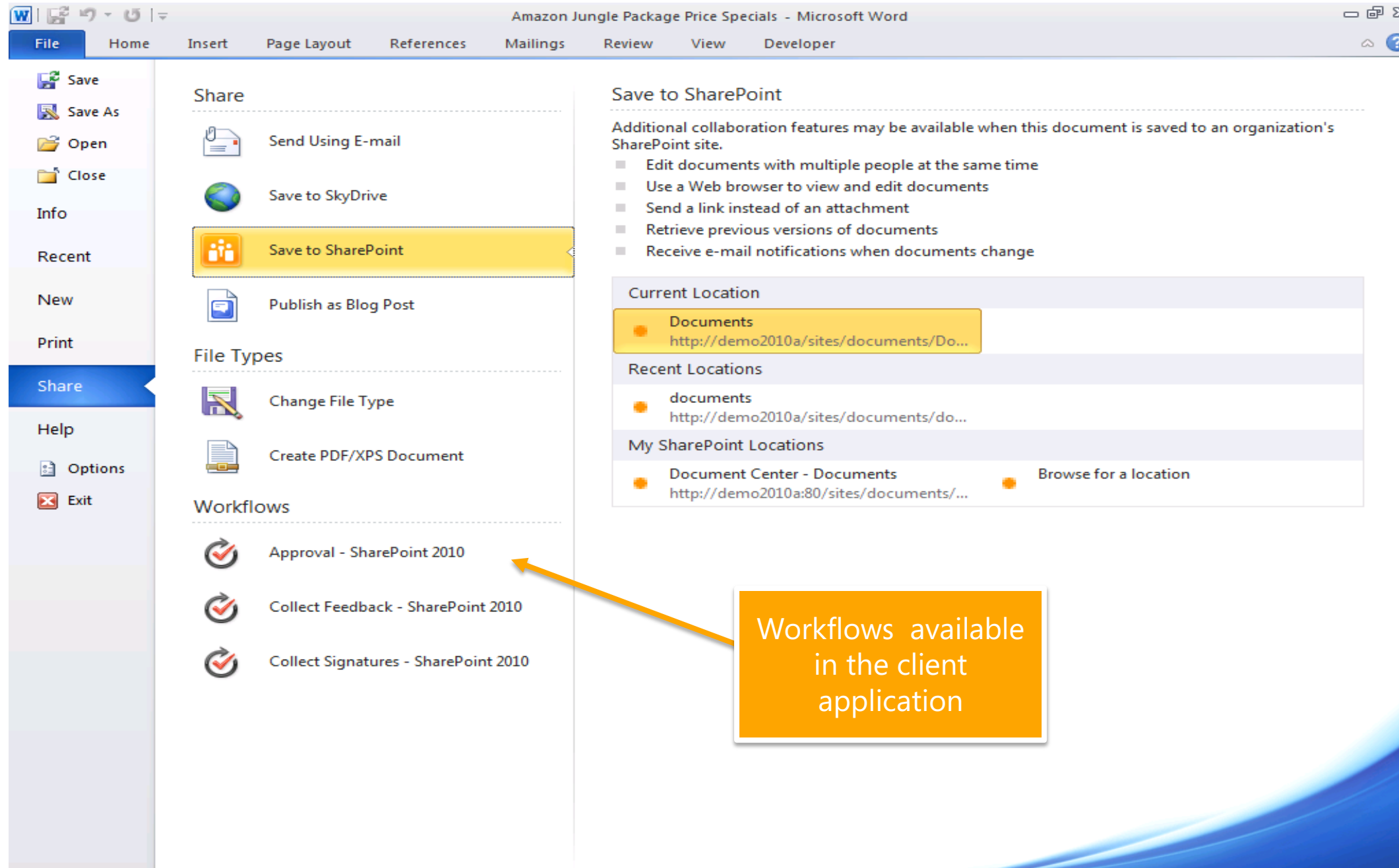




# Inspect and Remove Embedded Data



# Integrated Workflow



# Store Documents In Place or the Repository

The screenshot shows a SharePoint 'Documents' library interface. The top navigation bar includes 'Site Actions', 'Browse', 'Custom Commands', 'Documents', and 'Library'. The 'Documents' tab is active, showing a list of documents. A 'Declare Record' button is highlighted in the top ribbon, with a tooltip explaining its function. A 'Key Filters' section is visible at the bottom left. Four orange callout boxes provide additional context:

- Manual or Automatically Declare Records**: Points to the 'Declare Record' button in the top ribbon.
- Customize policies by content type or location**: Points to the 'Documents' library name in the left sidebar.
- Vault behavior to ensure content integrity**: Points to the 'Key Filters' section at the bottom left.
- Store multiple record types including e-mail**: Points to the document list, which includes various file types like PDFs and Word documents.

Type	Name	Document ID	Modified	Manufacturers	Products
Folder	Confidential		10/4/2009 7:49 PM		
Folder	Restricted		10/4/2009 7:49 PM		
Folder	Actiview Kenya Trip		10/4/2009 7:38 PM	Camp Time	Enormous Tents
File	Adventure Works Sales All Hands 1-20-09	CONTOSO-2-9	10/4/2009 7:49 PM		
File	Amazon Expedition	CONTOSO-2-48	10/4/2009 7:49 PM	Camp Time	Camping
File	Amazon Jungle Package Price Specials	CONTOSO-2-10	10/4/2009 7:49 PM		
File	Aspen Snowboarding Trip	CONTOSO-2-45	10/4/2009 7:50 PM	Cool Boards	
File	Big Bear Skiing	CONTOSO-2-57	10/5/2009 1:12 PM	Cool Boards	
File	Camp Time Enormous Tents	CONTOSO-2-15	10/4/2009 7:50 PM		Enormous
File	Camp Time Family Tents	CONTOSO-2-11	9/30/2009 2:24 PM		Family Te
File	Camp Time Slim Line Backpacking Tents	CONTOSO-2-12	9/30/2009 2:24 PM	Camp Time	Backpack Tents
File	Camp Time Super Cold Weather Tents	CONTOSO-2-18	9/30/2009 2:24 PM	Camp Time	Snow Ten
File	Camp Time Super Light Tents	CONTOSO-2-14	9/30/2009 2:24 PM	Camp Time	Ultralight Tents
File	Camp Time Tents 2009 Lineup	CONTOSO-2-17	10/8/2009 10:29 AM	Camp Time	Tents
File	Camp Time Tents Overview	CONTOSO-2-13	9/30/2009 2:24 PM	Camp Time	Tents
File	Camp Time Tiny Line Backpacking Tents	CONTOSO-2-16	9/30/2009 2:24 PM	Camp Time	Backpacking Tents
File	Camping Gear Promo 2009	CONTOSO-2-19	9/30/2009 6:20 PM	Camp Time	Camping
File	Camping Gear Promo	CONTOSO-2-20	9/30/2009 6:20 PM	Camp Time	Camping
File	Canadian Rockies Escape	CONTOSO-2-21	9/30/2009 2:24 PM	Camp Time	



# Document Set Management

Actiview Kenya Trip - Windows Internet Explorer

http://demo2010a/sites/documents/Documents/Forms/Sales%20Proposal/docsethomepage.aspx?ID=106&List=c...

Favorites Actiview Kenya Trip

Library Tools Document Set Manage

Site Actions Browse Page Custom Commands Documents Library

Actions

Documents Documents Drop Off Library Lists Tasks Recycle Bin All Site Content

Actiview Kenya Trip

This will be one to remember.

Account Name

Manufacturers

Pitch Date

Products

Sales Consultant

Actiview

Camp Time

10/22/2009 12:00 AM

Enormous Tents

CONTOSO\dianep

View All Properties

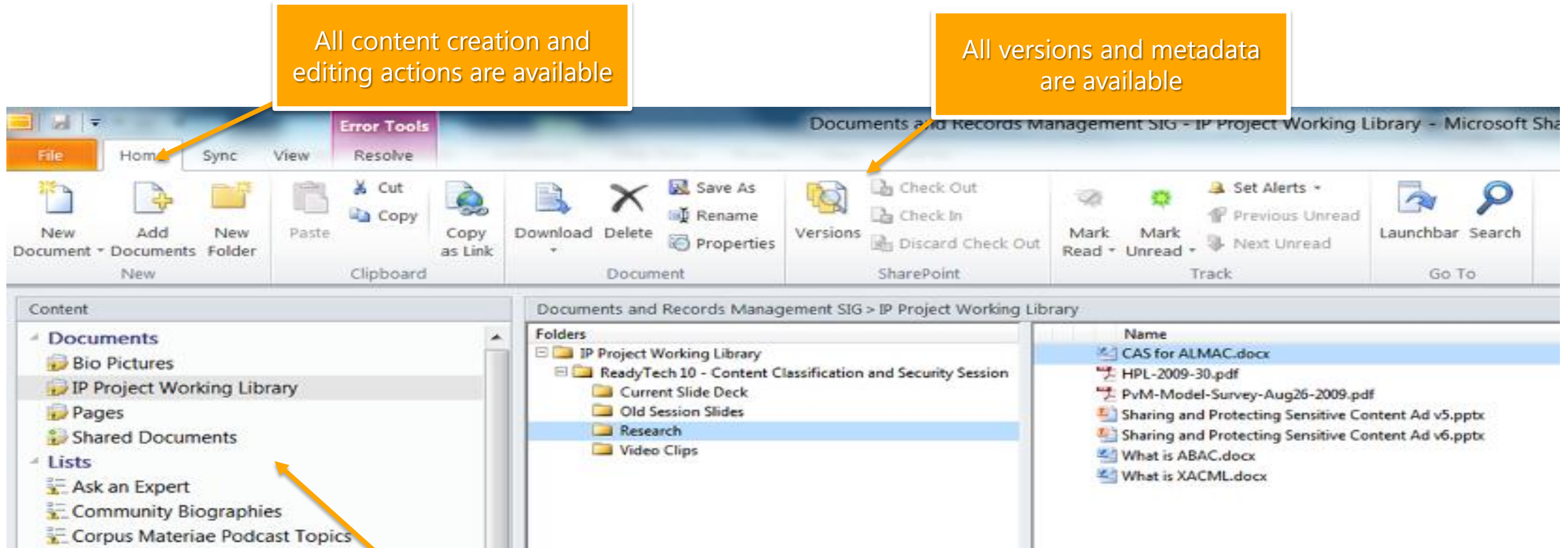
Edit Properties

Type	Name	Document ID	Modified	Manufacturers	Products
	Actiview Kenya Trip - Sales Brochure	CONTOSO-2-108	10/4/2009 7:38 PM	Camp Time	Enormous Tents
	Actiview Kenya Trip - Sales Presentation	CONTOSO-2-109	10/4/2009 7:38 PM	Camp Time	Enormous Tents
	Actiview Kenyya Trip - Sales Contract	CONTOSO-2-110	10/4/2009 7:44 PM	Camp Time	Enormous Tents

Shared Metadata

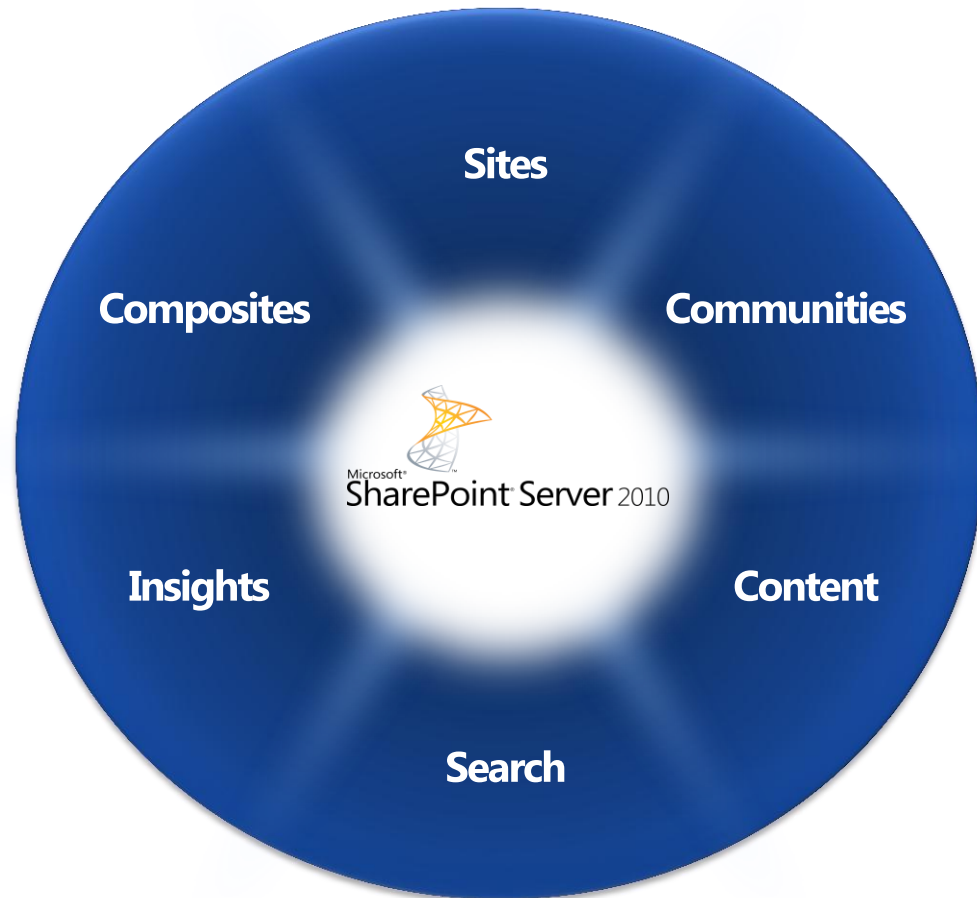
All items participate together in the ECM lifecycle

# Enable Offline Access





# 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*

# Support for Nontraditional Content Sources / Formats

Posts - Windows Internet Explorer

http://demo2010a/sites/ceoblog/Lists/Posts/AllPosts.aspx

Site Actions | Browse | Custom Commands | **List Tools** | Items | List

Contoso Administrator

New Item | New Folder | View Item | Edit Item | **Declare Record** | Version History | Item Permissions | Attach File | Workflows | Approve/Reject | I Like It | Tags & Notes

**Declare Record**

Declare item as a record which may add restrictions and record specific policies based on system settings.

	Created By	Published	Category	# Comments	Edit	Approval Status
<input checked="" type="checkbox"/>	Contoso Administrator	10/8/2009 4:37 PM		0		Approved
<input checked="" type="checkbox"/>	Contoso Administrator	10/8/2009 4:37 PM		0		Approved
<input checked="" type="checkbox"/>	Contoso Administrator	10/8/2009 4:36 PM		0		Approved
<input checked="" type="checkbox"/>	Contoso Administrator	10/8/2009 4:35 PM		0		Approved
<input checked="" type="checkbox"/>	Contoso Administrator	10/8/2009 4:35 PM		0		Approved
<input checked="" type="checkbox"/>	Contoso Administrator	10/8/2009 4:35 PM		0		Approved
<input checked="" type="checkbox"/>	System Account	10/8/2009 4:25 PM		0		Approved

+ Add new item

Documents  
Pictures  
Photos  
Lists  
Links  
**Posts**  
Comments  
Categories  
Discussions  
Surveys  
Recycle Bin  
All Site Content

javascript:;

Local intranet | Protected Mode: Off | 100%

Manage non traditional formats such as BLOGs and Wikis as records

# Discovery and Preservation

Search and Add to Hold - Windows Internet Explorer

http://demo2010a/sites/documents/\_layouts/searchAndAddToHold.aspx

Site Actions

Document Center > Search and Add to Hold

Use this page to discover content related to a particular litigation, investigation, or audit. Each search result can be added to a hold so that it can be properly retained. Alternatively, the results can be sent to another site, such as a Records Center.

Portal Document Center Record Center Publishing Portal

Search Criteria

Specify the site that you want to search and the search terms related to the hold.

You can specify complex searches using the keyword syntax. [Learn more about keyword syntax.](#)

Currently selected site:

Enter one or more search terms into the box below:

Select the action to perform on the search results:

☒ Keep in place and add to hold directly.

☐ Copy to another location and add the copy to a hold.

Destination location:

Select the hold to apply:

Description:

None

[Add a new hold...](#)

Done

Local intranet | Protected Mode: Off

100%

Discovery supported by  
SharePoint or FAST Search

Preserve in place or copy to  
another location for further  
processing

Content can have multiple  
holds

# 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....

# 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





# 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".

NEN2082 certificering

door onderzoekers van ECB Nederland BV uitgevoerd. "Het is uniek dat de implementatie van het SharePoint DMS/RMA volledig voldoet aan de Nederlandse norm met eisen van de ECB". Bij het ECB

# 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

# Coverage

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



# Cost Effective

Get the Capabilities You Need and Will Use



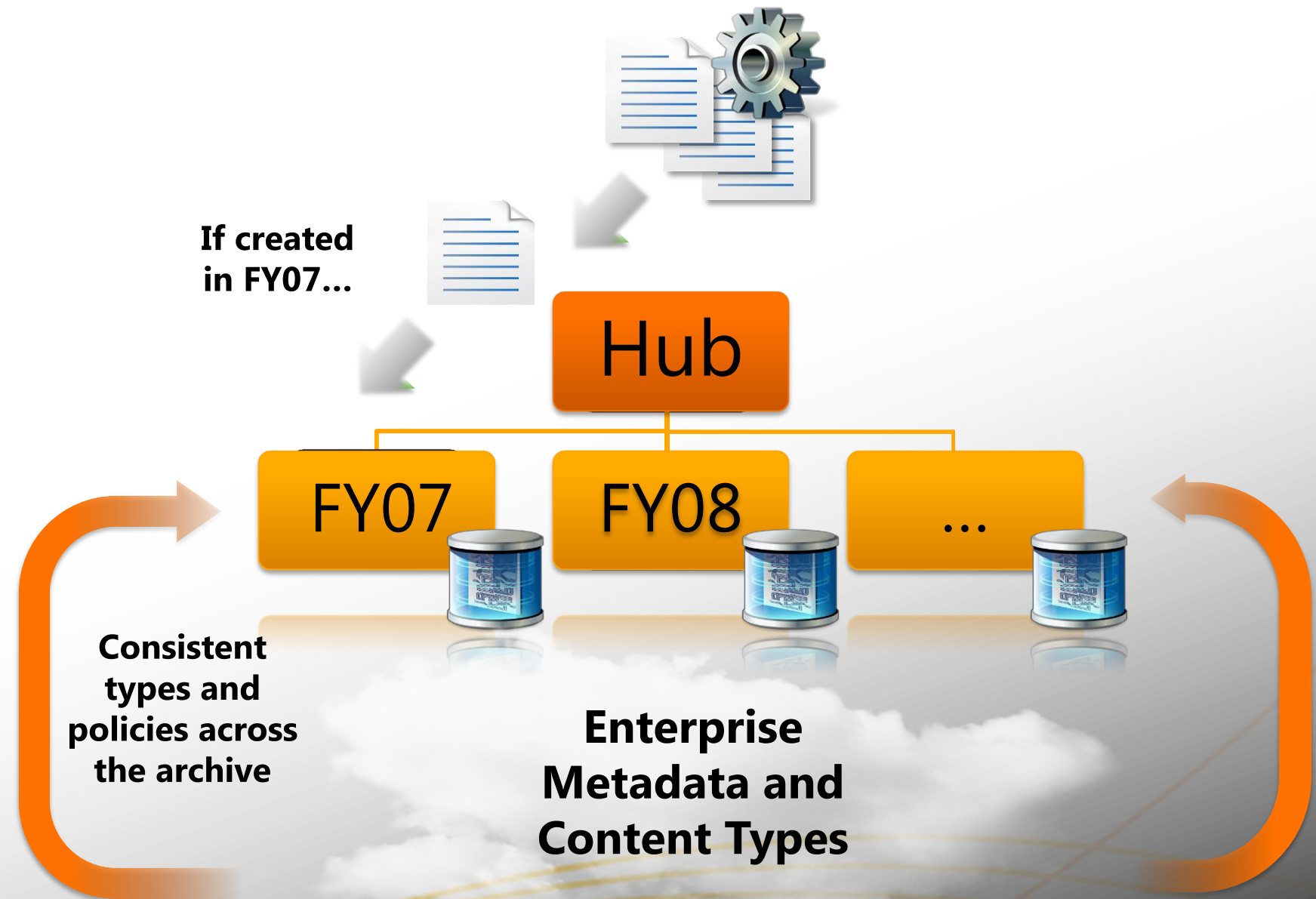


# Foundational ECM Capabilities

- 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

# Massive, Distributed Archive

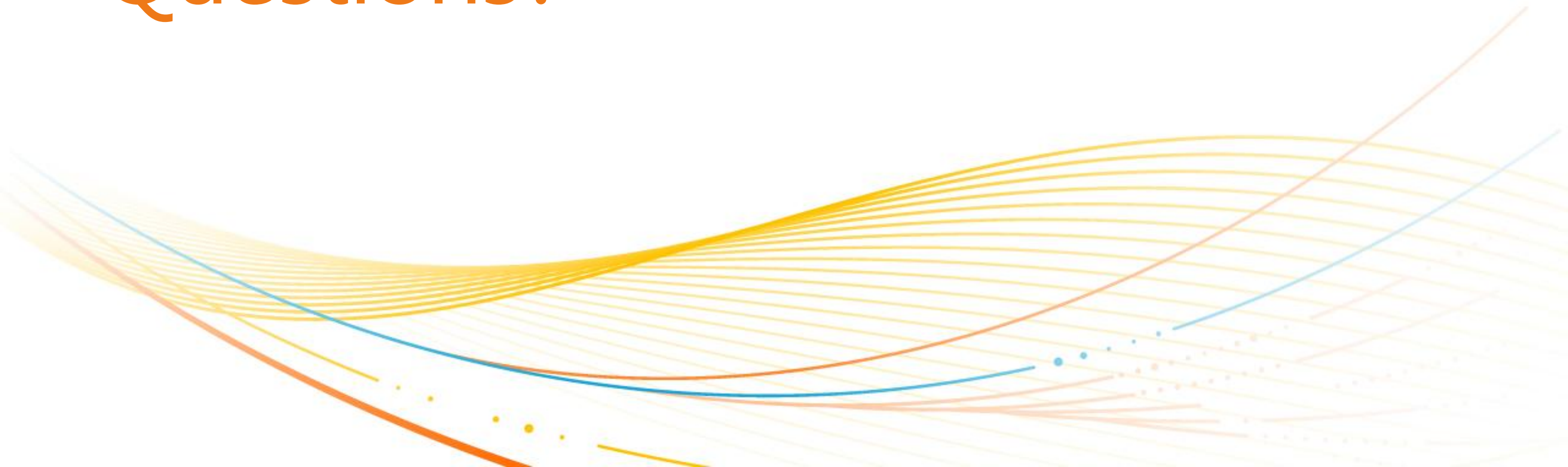
- Scale is achieved with a **distributed architecture**
- **Content organizer** can route content to correct site collection in the archive
- **Content type** syncing enables central management of distributed archive
- **FAST search** is used to retrieve content



# 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/>)

# Questions?







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