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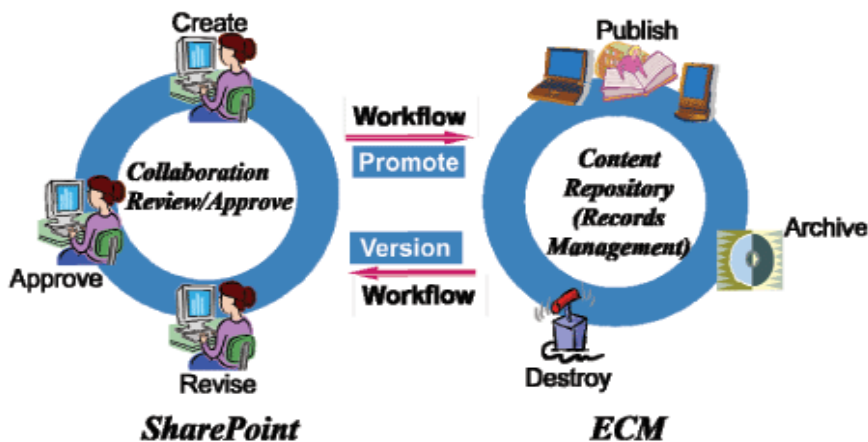
## SharePoint and ECM: Better Together

While at first glance there's overlap in functionality, SharePoint and ECM can work together to dramatically improve the management of your organization's content. A few thoughts on enabling that integration.

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— Alan Weintraub

Organizations are being driven to implement both enterprise content management (ECM) and collaboration solutions. Traditional ECM solutions enable the management of the organization's documents that govern the business operations but often lack the capabilities that foster cross-team collaboration. Microsoft's SharePoint (MOSS 2007) can provide both the collaborative functionality as well as document management functionality that, in some cases, can meet the business' ECM requirements. But in most cases, SharePoint does not prove to be a solution that can meet all of the organization's ECM requirements. Integrating SharePoint with an ECM solution will provide the best option to meet both the ECM and collaborative requirements.



### Microsoft and ECM Solutions

*SharePoint* provides a framework for users to collaborate and share information. SharePoint enables users to create, review, and share information in a configurable environment. Microsoft developed SharePoint to provide an environment that empowers the user to work collaboratively, making the authoring and exchange of information an easily integrated feature into Office 2007. SharePoint has proven to provide users with an interface that is intuitive and easy to use.

*ECM Solutions* provide an integrated document and records management capability. ECM functionality provides a secure repository to manage all approved corporate information which can include the drafts along with all associated communications. An ECM solution is a scalable architecture that easily allows the expansion from a single departmental system to a multi-location enterprise implementation.

### Building an integrated environment

*Microsoft SharePoint and an ECM solution* can co exist in an organization's computing environment. While it might first appear that the two systems share some of the same functionality, they can actually complement each other. The SharePoint architecture design limits the number of documents that can be stored in a single folder or document repository. This limitation may require a repository design that includes a deep, nested folding structure to accommodate all of the organization's documents. This compares to the ECM solution design that accommodates millions of documents in a single folder. Another difference is in the records management functionality. This version of SharePoint's Records Management capability was designed for organizations that require the ability to implement a uniform, non-segmented file plan. ECM Records Management solutions

are designed for those organizations that require DOD 5015.2 Chapter 4 compliance. In each case, the ECM solutions provide a capability that surpasses the SharePoint functionality.

Coexistence of the products can be accomplished by using integration through the SharePoint interface. Using the SharePoint interface, a user can access both Microsoft SharePoint and the ECM functionality from a single integrated interface. In the SharePoint environment, ECM functionality is integrated using a Web Part. Users are able to access all the functionality of SharePoint along with the documents managed in the ECM repository. Documents stored in the ECM repository can also be managed as record. From the single SharePoint interface, users have the ability to access separately both document management systems. The ECM solution can provide search capability that allows a user to find information in either SharePoint or the ECM repository.

### **Deciding on the Right Repository**

Making the decision on which document repository should manage the organization's documents is often not an easy decision. It should be based on the value of the information being created and shared within the organization. Once a document has received official approval and passes from being a draft to a corporate record, it requires management in a secure repository that also can provide records management functionality. Most organizations will use SharePoint as the repository for managing information during the creation, review, and approval steps in the lifecycle. SharePoint provides an environment that easily enables the creation and sharing of documents during the phases in the lifecycle where the document undergoes many changes. Once the document has passed from the draft stage to an approved corporate document, the document can be moved from SharePoint to the ECM repository where it can be managed in a highly secure environment and have records retention policies applied. This type of integration creates a clear delineation on the location of a document throughout its lifecycle.

### **Finding the Business Value in an Integrated Solution**

Microsoft SharePoint can provide the environment that can be used by anyone in the enterprise to access, collaborate, and share information. SharePoint as a document management system can be used by everyone in the organization to manage their non-critical documents and the drafting stage of their corporate document. Once a document is approved, it can be moved to the ECM repository for on-going management and retention. By segregating the documents in this fashion, an organization can meet their enterprise requirements for managing and retaining a large number of documents in a scalable architecture while providing their users with an integrated document management and collaborative environment.

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