

Easy to Deploy, Use and Maintain...

Affordability in Content Management and Compliance

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The impetus on organizations to be transparent and fiscally prudent continues to intensify, motivated by the constant drive for more competitive efficiency and the need for compliance with corporate governance initiatives. Therefore, most organizations have moved to implement some type of content management system (CMS) to handle their data, such as RMA, DMS, Web-content management or a combined solution.

Because the types and volume of information continue to expand, CMS complexity and sophistication have grown in parallel. As a result, organizations can become overwhelmed when evaluating solutions to address their specific content management needs, particularly considering the hundreds of vendors offering a wide variety of content management tools. To compensate, potential users often end up evaluating CMS quality based upon its capacity to handle what is perceived as the most complex and/or “hot” item in their suite of information materials—such as massive e-mail collections, Web content or digital rights management—rather than addressing the straightforward core capabilities the organization typically requires. Content management is a modular process, which should be developed to support new media in the same functional way that has for many years been used to handle paper files.

Complex Content Management Debunked

Focusing on complex data types can lead organizations to assume they must overspend on large, overly complex systems to handle all information processing activities. Organizations can feel like there’s no choice but to endure the significant associated costs: long implementation and training times, huge IT infrastructure costs, significant maintenance requirements

and so on. E-mail management, for instance, can be especially intimidating because it is often positioned as operating under different guidelines than other information that companies archive, particularly in terms of significant and expensive storage requirements.

This perception leads to another point: why, for instance, do so many vendors’ e-mail solutions focus on mass storage of e-mails if this type of narrow approach has long been viewed as inappropriate for other kinds of archived data that companies need ready access to? For any type of data, a “just store everything” approach can give the impression of being well-positioned for information retrieval in case of audits, for example, but it deflects attention from critical concerns about efficient, timely and accurate retrieval of specific, relevant information.

Moreover, “just storing everything” increases the chance that information repositories become *liability vaults*: in other words, information is retained that doesn’t, by law, need to be kept, which increases risk, and overall competitiveness diminishes in terms of search accuracy, retrieval efficiency and cost-effectiveness. In addition, because compliance regulations view all company information equally, it’s counterintuitive to process one type of data differently from others. Compilation and retrieval of information slows down and assurances of accuracy are compromised.

Because some organizations become so intimidated by what they see as overly complicated content management factors and an imposing breadth of accountability, they may view the need for a CMS as a catalyst to reorganize their entire IT infrastructure. This attitude assumes that the full range of content management needs is readily apparent and that resources are in place to tackle it in



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one go. ZyLAB argues that a scalable, incremental approach is preferable in nearly all instances because it anticipates the “organic” adjustments organizations must routinely make as their needs fluctuate. Organizations and compliance regulations are so dynamic that change must be accounted for, and any selected CMS must have the adaptability to minimize the cost implications of those changes. Scalable approaches are also better positioned to handle one type of content that many complex CMS systems cannot: paper.

Simplicity as a Driver for Scaleable CMS

This viewpoint is not an advocacy of *dumbing down* CMS functionality or, worse, converting everything to paper—far from it. Multifaceted organizations operate in complex ways, requiring solutions that support a variety of processes, essential activities and associated data. If the evaluation criteria for the most complex components in CMS are viewed differently than other content management components, the level of complexity required by most organizations, particularly small- and medium-sized businesses, is overstated, and the importance of favoring simplicity as a reference point is underestimated. At the core of any simple and effective solution lies its ability to address the straightforward, yet challenging, issue that still affects many organizations: how to efficiently archive, search, organize and retrieve information from thousands of pages of paper. The fact remains: the paperless office still does not exist and will not.

Corporate governance regulations consider (paper) records management very important. Users can be trained to make proper compliance-based decisions about keeping and destroying paper, and the logic driving these decisions is generally consistent with long-held approaches to handling paper. Users can save relevant documents within set retention periods, and they can decide if they

Key Considerations for Evaluating Content Management Systems

For over 20 years, ZylAB has worked alongside organizations with immense data repositories to develop the best archiving, searching and retrieval solutions. This experience has shown that, although attention to specific types of content management issues may ebb and flow, core concerns remain constant and need to be addressed:

- ◆ Just because e-mail is, according to a recent IDC report, the “elephant in the corner,” doesn’t mean its management should be intimidating or viewed as exceptional within a larger content management context. In fact, efficient and targeted (project-based) storage solutions—focused on exporting PST files into an open, XML-based ZylIMAGE Webserver, for instance, rather than on wholesale dumping of Exchange servers in large database repositories—enable users to efficiently conduct a breadth of integrated searching and records management activities within their entire content management infrastructure. Security and back-up activities are not compromised.
- ◆ The paperless office does not exist nor will it any time soon. The fact that paper still exists in mass quantities demonstrates that organizations still realize the multiple benefits offered by paper documents. ZylLAB has long specialized in retaining all the benefits of paper while relieving the burden of paper (storage, transportation, accessibility, and so on), as well as also allowing digitized paper to be searched at the same time as other archived data types, such as e-mail.
- ◆ Good CMSs require open technology and open formats, such as XML and TIFF. Regardless of documents’ original file types, information contained within them must be secure and available for their entire lifecycle. Organizations need assurance that their information is always accessible without having to worry about upgrading or continually revamping their systems.
- ◆ Expectations for efficiency and cost-effectiveness are as high as they are for system performance. Efficiency-focused organizations demand software that is easy to use, install, deploy, support and maintain. Users no longer tolerate spending weeks in training courses; solution deployment should take days, not weeks or months.
- ◆ Meeting compliance requirements is a cost factor, so CMSs must be flexible and integratable, supported by fast and usable searching, retrieving and organizing capabilities. Being able to leverage the wealth of records information makes organizations more competitive and cost effective, particularly in terms of secondary costs like legal fees and staffing.
- ◆ A key to effective and affordable solutions is being able to buy only what you need. Vendors need to do a better job of respecting organizational understanding of content management wants and needs, and how to address those needs, particularly in terms of scale (i.e. lower upfront costs, quicker deployment and ROI and better positioning for incremental future growth, if necessary).
- ◆ Integration with existing systems is preferable to comprehensive overhauls. Replacing significant parts of existing systems is costly and time-consuming. New CMS components should also quickly and seamlessly integrate into specialized tooling (such as case management tools for legal professionals).

want to store printed documents in a CMS. But certain “high-end” CMSs do not provide this expected level of control and flexibility for all of the content types they manage.

Overcoming Intimidation: Electronic Media and E-mail

The primary concerns that drive a CMS’s suitability should be the same that organizations have used to manage paper: efficient, secure storage of archived data, fast and accurate searching and retrieval of targeted information, use of open-technology for long-term stability and flexibility, and scalable and integratable construction for easy deployment and usage. If the expectations for managing paper are used as the primary criteria for judging how all data (including e-mails and Web content) should be managed and utilized, organizations can simplify their content management expectations and not lose sight of the larger content management context. In other words, “complex” data like e-mail doesn’t have to be treated as a wholly separate item needing a management approach different than that typically used for other types of information.

How and why any information needs to be stored and used in the first place is primary to evaluating a CMS. All forms of retained data, whether they are paper-based documents, e-mails and attachments, presentations, video conferences and so on, are all parts of the larger, integrated content management arena and need to be addressed as such. The role of paper cannot be underestimated; in many organizations, the burden of paper is still their key content management challenge. Data is retained for a reason—to have the retrieval of information readily available—so it should be supported by a CMS that makes all information accessible and searchable at the same time, in the same way, in a secure environment, and at an affordable price.

Organizations can perform all of their content management tasks effectively without having to purchase monolithic, feature-heavy solutions that can adversely affect overall affordability and usability. Scaleable, flexible and open solutions, which enable organizations to handle paper, electronic files and e-mail at whatever level of complexity they actually need, are readily available.

The bottom line: long-established criteria for managing paper is also relevant for managing other types of information. Paper is still a primary factor for many organizations, and

for these organizations, the manner in which they handle paper should provide the foundation from which all other CMS capabilities refer. By taking care of the paper records and then gradually moving to more complex media types, an affordable and controllable implementation process can be realized. Using such basic functionality as the defining criteria for evaluating suitable CMSs enables organizations to not only focus on what their users really need but also enables them to view the scale in which they need it. Doing more with less is always better than defaulting to the biggest and most complex solution just because there doesn’t seem to be any other choice. ■

ZylLAB is an innovative developer of affordable content management and compliance solutions for paper-intensive organizations. ZylIMAGE, ZylLAB’s flagship solution, helps small and medium-sized businesses (SMBs) and government organizations digitally file and manage millions of pages of paper, electronic documents, and e-mail. High-quality search and retrieval features (which support over 200 languages) give users the ability to easily organize, investigate, and distribute information.

With more than 7,000 installations worldwide and more than 300,000 users, ZylLAB has a wide breadth of experience and knowledge across a variety of different industries and business applications. For more information visit: www.zylab.com.