



**Information Management** software

## **Harnessing value from and controlling casually created and shared content.**

*Business content services and strategy from IBM*



---

**Contents**

---

- 2 *Is your knowledge worker content creating unchecked clutter or adding value?***
- 4 *Gain control of content chaos: the payoff***
- 5 *The way forward: Move beyond just sharing and collaboration***
- 10 *Address today's business problems while building a foundation for ongoing success***
- 11 *Why business content services from IBM?***

**Is your knowledge worker content creating unchecked clutter or adding value?**

When it comes to content, some things are obvious. For example, casually created, shared and consumed content—or unstructured content—produced by general business users and knowledge workers is practically everywhere in your business. And it's growing fast. Among these images, text documents, spreadsheets, presentations, graphics, drawings, e-mail, video and multimedia files spread across desktops, networks, databases and file shares are many business-critical resources.

What's less obvious is how to get what the business—not just individual departments or teams—needs from all of this content. How do you or your users differentiate between business-critical and unimportant files? How do you get visibility into the casually created content that is circulating within and outside of your business? And once you discern which content is of value, how do you get access to it, get the best value from it, and retain and manage it?

Based on our research and work with clients, IBM understands that many companies are struggling with how to deal with content on several levels.

**Improving efficiency for individuals**

Individuals may find it difficult to locate, access and retrieve content from the current content stores—such as file shares, e-mail archives and collaboration databases—and then use that content in everyday business tasks. Until now, most of the solutions considered helpful for gaining control of content have not addressed individuals' needs, one of the most important of which is consistently delivering content that is accurate, up to date and the accepted single source of the "truth." In fact, individuals can waste time trying to synchronize the content they create or co-maintain in Microsoft® Office and other applications as it routes through e-mail applications and other tools.

*When it comes to using and managing content, most companies need help improving efficiency for individuals, enabling efficient document sharing, leveraging content in business processes and managing content services products and providers.*

#### **Enabling teams to share documents**

Team collaboration tools like IBM Lotus® Quickr™ and Microsoft SharePoint software make it easier to share documents within localized teams. While these collaboration tools are user friendly and widely used as next-generation network drives, they are best used with smaller groups of users—for example in interdepartmental or project-oriented situations—to assist in collaboration and social networking capabilities. These tools do not, however, offer capabilities that address challenges around content duplication and synchronization.

#### **Improving business automation and enhancing processes**

A lack of support for automation and ad hoc business processes limits efficiency and flexibility. Historically, content management capabilities have focused on meeting the needs of custom content-enabled vertical applications (CEVAs) developed to automate high-value business processes. However, for lesser-valued departmental applications, departments have had to implement custom approaches for using file-sharing and database capabilities to manage content. And building numerous Web applications or Microsoft SharePoint Web Parts applications across individual departments can lead to high costs as well as business continuity and maintenance challenges.

#### **Managing the different content services products, integrations and providers**

The costs of deploying and maintaining multiple vendor point solutions are high. Today, managing content effectively and deploying business-critical applications requires workflow and business process management, content integration, scanning, imaging, e-mail management, automated classification, taxonomy management, Web Part/portlet management, electronic forms, content collection, content migration, document archiving, records management, electronic discovery—and more.

*Organizations need to take control of casually created and consumed content to improve productivity, reduce task duplication and avoid compliance fines.*

The costs of these four challenges to the business are real. Failure to address them can translate into lost productivity from duplicated tasks, potential compliance fines and a wide array of business process inefficiencies. Organizations need an approach that can solve the business challenges of today using a building-block approach that is a solid foundation for solving the challenges of tomorrow.

The foundation of this approach is a centrally provisioned content infrastructure that is comprised of a set of ECM shared services. The services can be used to discover, manage and control content generated through collaborative and social software tools, business applications and other content management systems.

*This executive brief explains how you can take control of your content using an ECM shared services approach, which IBM calls business content services.*

This executive brief outlines the benefits of business content management using a strategy that employs an enterprise content management (ECM) shared services approach. It explains how you can take control of casually created and consumed content to drive value, and emphasizes the top things to keep in mind when considering a content management system. It also introduces a new standard called Content Management Interoperability Services (CMIS). CMIS can be used by applications to work with one or more content-based applications or content repositories in a uniform manner.

#### **Gain control of content chaos: the payoff**

With the proliferation of new content types and social networking technologies—such as wikis, blogs and instant messaging, as well as realtime file sharing and collaboration across the enterprise—it's no wonder organizations struggle with how to best leverage and manage content. For general business and knowledge workers, how content is managed is usually an afterthought. Their priority is to create, exchange and modify content based on immediate needs.

*Once users create content, companies need ways to make it more active in processes.*

Once content is created, it often sits inactive on user desktops and file shares or in databases and e-mail archives where it is difficult to access. To help optimize its value and to gain visibility and control, companies need a way to make this content active. In other words, they need content that is normalized to represent a single source of the truth and is available or delivered in context to users and leveraged in business processes. There are compelling reasons to make content more active on multiple levels of the business.

- **Personal**—Active content boosts efficiency by helping to make content easier to manage, access and retrieve. It also helps minimize task duplication by classifying and managing content versions across the organization as well as automating manual processes that run up labor costs.
- **Teams**—Active content helps drive innovation by providing teams a way to effectively manage shared content, helping them do their jobs more efficiently and effectively. It also promotes content reuse, repurposing and automated workflows.
- **Departmental applications**—Active content supports faster time to value for new application deployments through the reuse and repurposing of standard business process models, simulation and monitoring.
- **Shared ECM**—Active content facilitates regulatory compliance as part of intrinsic content management services, helping support compliance with changing corporate governance requirements and reducing the likelihood of penalties.

*Point solutions for managing content cannot practically solve the array of challenges faced by content-centric businesses, and the costs of integrating and maintaining such solutions are high.*

#### **The way forward: Move beyond just sharing and collaboration**

With so many people and applications generating content, it's critical to have a forward-looking content management strategy that can address your needs today and continue to scale and flex as business needs change.

While companies may have point solutions that address content-related challenges, isolated solutions cannot practically solve the myriad challenges related to content-centric business. And the costs of integrating and maintaining a fractured collection of content capabilities are high. IBM believes the best way for companies to enhance the value of content and technology investments is

*IBM believes the best way to enhance the value of content and technology investments is to approach content as a continuum of needs, whereby content streams to a master content repository.*

to approach content management as a continuum of needs whereby content streams channel to a master content repository. The continuum is based on a foundation of ECM capabilities that are shared across your business. A content services approach can benefit each key area of content creation and consumption in your business.

#### **Personal content services**

Improve efficiency by providing basic content services that are transparent to users through desktop integrations for Microsoft Office software and e-mail clients. You can also enable knowledge workers to use advanced tools for accessing, searching, classifying, analyzing and managing their content, helping boost productivity, accuracy and compliance efforts.

#### **Team content services**

Manage content in existing content stores including file shares, Lotus Quickr and Microsoft SharePoint content stores by monitoring and crawling them using classification and rule-based processing tools to identify what needs to be handled as business-critical content. In most cases, companies are using Lotus Quickr and Microsoft SharePoint technologies as network drives or as simple content services to provide transparency. For content that is business critical, companies can extend the file-sharing capabilities in Lotus Quickr and Microsoft SharePoint software with an array of capabilities that benefit knowledge workers, managers and compliance officers. For example, you can extend Lotus Quickr and Microsoft SharePoint technology with the following capabilities: workflow and business process management, content integration, scanning, imaging, e-mail management, automated classification, taxonomy management, content collection, content migration, document archiving, records management and electronic discovery.

*A content services approach can benefit each key area of content creation and consumption in your business, including individuals, teams, content-enabled applications and ECM services.*

#### **Content-enabled application services**

Move beyond using content management for CEVAs only to address more general business needs, and achieve greater flexibility and faster time to value from content and applications by taking advantage of shared ECM application services that support composite applications configured using mashup widgets. This approach uses the same ECM infrastructure for different applications, helping reduce the cost of development and ownership and leveraging the broadest range of ECM capabilities.

#### **Open standards**

Many organizations have acquired or inherited software to help manage their business content. To that end they have also discovered that managed content has to interact with collaborative tools, business applications and other content management systems. The best way to gain better interaction is to adopt a common specification or standard that simplifies the interactions between the applications. Content Management Interoperability Services (CMIS) is a standards effort that can be used by applications to work with one or more content-based applications or content repositories in a uniform manner. More than a year in development, the CMIS standard is supported by IBM, Microsoft, SAP, BEA/Oracle, EMC, OpenText and Alfresco. Submission of the standards and specifications to the Organization for the Advancement of Structured Information Standards (OASIS) is now underway and is anticipated to be approved sometime in 2009.

Generally speaking, all content applications support a common set of functions, which are based on basic content services capabilities such as check-in/check-out, view and update meta-data properties. However, without CMIS, there was no standard approach for how these applications interacted with one another. Previously organizations had to rely heavily on system implementers and their intimate knowledge of APIs and custom code to provide interoperability of various basic content services systems. While the CMIS standard does not replace the robust APIs that each application offers, the CMIS standard opens new possibilities for organizations, IBM Business Partners and systems integrators to easily and effectively integrate ECM products that follow the CMIS standards.

#### **ECM services**

ECM deployed as a shared service can provide the highly available and scalable services that organizations need for numerous content-related challenges. For example, it can help you deal with growing volumes of content, increasing reliance on business automation, the proliferation of content-enabled applications and the need for an ever-expanding list of content management capabilities.

*A comprehensive ECM-based approach—which IBM calls business content services—is needed to realize the full business potential of all content and to stop it from going dormant after one-off uses.*

IBM believes that for businesses to realize the full business potential of all content and stop it from going dormant after one-off projects are complete, a comprehensive approach is required. To deliver value from content over the long term, organizations can benefit from a business-needs-driven, ECM-based approach. The business content services strategy from IBM is just such an approach that works with standard desktop, collaboration and content management applications to make general- and knowledge-worker-created content an active asset in your business. As highlighted above, business content services from IBM can support operations on four distinct levels.



Why are capabilities in each of these levels important? Let's examine the life of a document in three contexts and the corresponding implications.

- *In an environment that lacks tools for document collaboration.* A document saved on a local or shared drive tends to serve only the individual who saved the document to that location. Since there are no mechanisms in place to synchronize multiple versions of the document, gaining consensus about which version is current is problematic. For example, if the user decides to maintain multiple versions of the same document, the versions must be named in a meaningful way. Moreover, potential contributors can only access the document if they have permission to enter the location. When another user needs to find the document, he or she needs to understand the naming and filing conventions and use operating system searches. When e-mail is used to route a document, the challenge is magnified because users start saving their own versions of the document on local drives. Each time a user makes a change, he or she is potentially outdating other documents and even creating conflicts. Meanwhile, the file storage requirements for maintaining the different versions rise.
- *In an environment with document collaboration tools.* Carrying the example of the document above into a Lotus Quickr or Microsoft SharePoint environment helps to streamline the update experience and address some of the challenges related to using local or shared drives. These environments provide a centralized access point to a document, supporting more flexible and sophisticated approaches for indexing content and maintaining version history. Moreover, the team collaborating on a project can manage document access and storage as opposed to the above situation, which requires IT support. Yet document duplication is still possible in Lotus Quickr and Microsoft SharePoint environments because these collaboration sites typically are not considered long-term repositories—and for good reason. Users only loosely maintain these sites, so unapproved versions of documents can mix with approved versions. At the same time, taxonomies that could extend and enhance content reuse or retention are loosely maintained and access is left up to the collaboration team, so in many cases content is duplicated, outdated or inaccessible to the broader audience it might serve.
- *In an environment with multiple content repositories.* When companies merge or need to exchange content with other departments or businesses that have different content repositories or applications, the process requires careful coordination between environments. The most common challenges organizations face include how to manage access control and common taxonomies and when to pass the content versus when to grant access to content.

Over time these scenarios can create challenges around corporate compliance and records retention. Approved content that is duplicated or mixed in with unapproved works in progress can lead to costly consequences. Content that is retained for extended periods after project completion could be accidentally deleted or lost. And other content that was never approved or is now outdated could remain long after it was supposed to be discarded.

**Address today's business problems while building a foundation for ongoing success**

By employing the business content services strategy, you can help enable general business and knowledge workers to more easily find, retrieve and share information. How? By equipping them with integrated capabilities that enable them to more easily address day-to-day challenges related to managing documents and e-mails, and using collaboration and file-sharing tools such as Lotus Quickr and Microsoft SharePoint software. You can also extend the value of active content by enabling other content management applications to exchange content and leverage a scaleable and reliable master repository where active content can be cataloged and retained for reuse, repurposing and discovery.

*A business content services strategy helps organizations manage content from where teams use it and provides a foundation for harnessing the proliferation of casually created and communicated information.*

The business content services strategy from IBM helps manage content where teams use it and provides a solid foundation for harnessing the proliferation of casually created and communicated information. By connecting the desktop with workgroups, applications and the enterprise at large, business content services can help you incorporate useful content into mainstream business processes, providing mechanisms, vehicles and structures for users to efficiently navigate up and down the content flow. Using intelligent archiving tools from IBM, files located on shared drives and in e-mails can be channeled (based on business rules and corporate taxonomies) into a single repository, helping reduce duplication and increasing accessibility to content based on the business process as opposed to the IT disk access and indexing infrastructure. Collaboration tools such as Lotus Quickr and Microsoft SharePoint software enhance and extend access to content by serving as both a collection and collaboration point for documents as they make their way through the mainstream business content life cycle.

*Business content services from IBM is based on a shared services approach that delivers integrated solutions for each level of content management needs in the enterprise—while delivering exceptional scalability and flexibility.*

Business content services from IBM is based on a shared services approach that delivers integrated solutions for each level of content management needs in the enterprise, including personal, team collaboration, content-enabled applications and ECM shared services—while delivering exceptional scalability and flexibility. And unlike point solutions that can only address limited areas, the business content services strategy is designed to help address today's pressing business challenges with an eye toward the future.

#### **Why business content services from IBM?**

To extract the most business value from your investments over time, it's important to consider an array of factors as you develop your document or content management strategy.

- **Active content**—the ability to manage information that is unified, accurate and in context with critical business processes and policy management.
- **Business agility**—the ability to provide the right information to the right constituents at the right time in the right context to help enable better decisions, faster, and enhance return on investment (ROI) from solution deployments.
- **Enterprise compliance**—the ability to manage risk and automate compliance efforts for office, e-mail and collaboration software with the help of records management, legal discovery and archiving solutions.
- **Pervasive and persuasive content**—the ability to provide business content services and document management services for business users enterprisewide to improve collaboration and enhance business processes.
- **Comprehensive provider**—an organization that can provide solutions and services to support the gamut of content and document management challenges.
- **Scalability**—an approach that can keep up with exponential growth in casually created, consumed and managed content.
- **Usability/minimal impact on end users and processes**—an approach that doesn't significantly change the way people work or cause frustration and avoidance of new processes.
- **Retention of existing investments**—an approach that doesn't require you to rip and replace existing investments, but rather builds on what you already have in place.



ECM services combined with the business content services strategy from IBM help across the spectrum of content levels. With ECM solutions from IBM, you provide a centrally provisioned, basic and enterprise content service to users who create and communicate content. You can also bring the existing content under control and extend its value through a shared infrastructure service. Moreover, the business content services strategy from IBM can help you deploy ECM infrastructure services that support a broader spectrum of business application development environments that can interact with content.

When it comes to ECM challenges, IBM capabilities and experience are virtually unparalleled. As a marketplace leader in content, process and compliance software, IBM offers a broad set of mission-critical solutions that help businesses make better decisions, faster. More than 13,000 global companies, organizations and governments rely on ECM solutions from IBM to help improve performance and remain competitive through innovation. It's time to find out what we can do for you.

#### **For more information**

To learn more about business content services from IBM, contact your IBM representative or visit:

[ibm.com/software/data/content-management/business-content.html](http://ibm.com/software/data/content-management/business-content.html)

© Copyright IBM Corporation 2008

IBM Corporation  
Software Group  
3565 Harbor Boulevard  
Costa Mesa, CA 92626-1420  
U.S.A.

Produced in the United States of America  
September 2008  
All Rights Reserved

IBM, the IBM logo, and [ibm.com](http://ibm.com) are trademarks or registered trademarks of International Business Machines Corporation in the United States, other countries, or both. If these and other IBM trademarked terms are marked on their first occurrence in this information with a trademark symbol (® or ™), these symbols indicate U.S. registered or common law trademarks owned by IBM at the time this information was published. Such trademarks may also be registered or common law trademarks in other countries. A current list of IBM trademarks is available on the Web at "Copyright and trademark information" at [ibm.com/legal/copytrade.shtml](http://ibm.com/legal/copytrade.shtml)

Microsoft is a trademark of Microsoft Corporation in the United States, other countries, or both.

Other company, product, or service names may be trademarks or service marks of others.

References in this publication to IBM products or services do not imply that IBM intends to make them available in all countries in which IBM operates.

The information contained in this documentation is provided for informational purposes only. While efforts were made to verify the completeness and accuracy of the information contained in this documentation, it is provided "as is" without warranty of any kind, express or implied. In addition, this information is based on IBM's current product plans and strategy, which are subject to change by IBM without notice. IBM shall not be responsible for any damages arising out of the use of, or otherwise related to, this documentation or any other documentation. Nothing contained in this documentation is intended to, nor shall have the effect of, creating any warranties or representations from IBM (or its suppliers or licensors), or altering the terms and conditions of the applicable license agreement governing the use of IBM software.

Each IBM customer is responsible for ensuring its own compliance with legal requirements. It is the customer's sole responsibility to obtain advice of competent legal counsel as to the identification and interpretation of any relevant laws and regulatory requirements that may affect the customer's business and any actions the customer may need to take to comply with such laws. IBM does not provide legal advice or represent or warrant that its services or products will ensure that the customer is in compliance with any law.