



Microsoft SharePoint and Integration with Content Management Platforms

FileHold - Providing Advanced Content Management Functionality

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Introduction

Interest in SharePoint from my clientele is very high at this time and was stated by Bill Gates as being Microsoft's most successful platform launch. As an independent consultant I prepared this white paper as an overview of SharePoint and FileHold document management software (www.filehold.com) and how co-existence can help provide a 'best of both worlds' approach that satisfies most if not all business requirements.

With all its success, caution needs to be taken so as not to repeat the mistakes many organizations made when they deployed Lotus notes and content repositories proliferated. "Going Viral" is great for Facebook and youTube but not for enterprise content. Centralization of content management into a "System of Record" is critical. A system of record is an information repository that is the authoritative source for a given piece of information. The need of the system of record is acute as workers collaborate to create content for a specific business use. Often the integrity of the data is vital and the validity is open to question when it is not auditable or traceable.

There are many versions of SharePoint and enterprise decision-makers first need to fully understand the various versions and functions to avoid buying more than the enterprise requires. Next they need to consider the Total Cost of Ownership of implementing advanced content management on a SharePoint platform. Lastly, thought should be given to ongoing deployment and administration. With FileHold and SharePoint companies can now afford to adopt advanced Content Management across the entirety of the business enterprise.

The Evolution of SharePoint

SharePoint originated as Microsoft's portal platform to provide their customers integration with the Microsoft IT infrastructure and the information workers desktop. As portals and collaboration evolved the need to support content as part of the platform became required. In fact, SharePoint is a great access point in to the world of real Enterprise Content Management (ECM).

Levels, Versions, and Functions of SharePoint

There are currently two *levels* of SharePoint:

- Windows SharePoint Services (WSS)
- SharePoint Server.

WSS *versions* include:

- WSS 3.0
- WSS 2.0
- SharePoint Team Services (STS)

SharePoint Server *versions* include:

- MOSS 2007 Enterprise Edition
- MOSS 2007 Standard Edition
- SharePoint Portal Server 2003
- SharePoint Portal Server 2001

Microsoft materials present SharePoint as having six distinct *functions* which include:

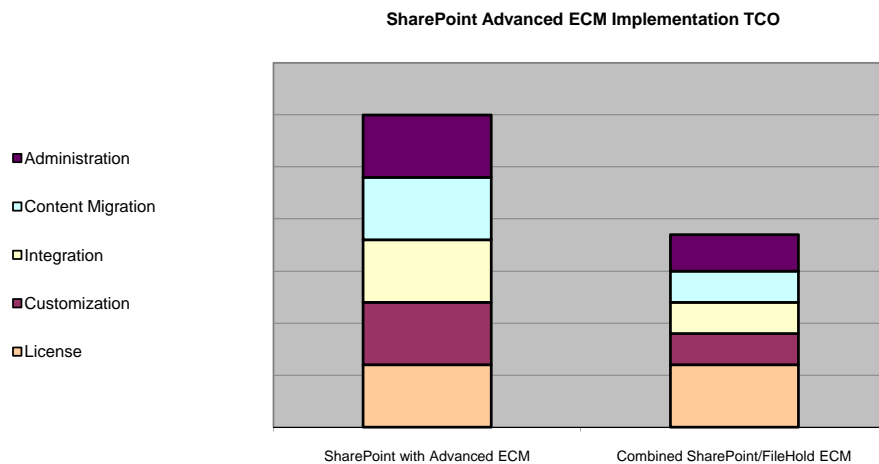
- Portal
- Search
- Collaboration
- Content Management
- Business Intelligence
- Business Forms

Depending on which functions the enterprise requires and whether you choose to deploy content management with FileHold, WSS may be adequate or at least a solid initial step to implementing a SharePoint platform with advanced Content Management. You could then leverage the content, web parts and templates when a MOSS upgrade is required.

Advanced ECM

Until now, ECM products, such as FileHold, have been deployed primarily as a point solution or a component of a line-of-business application. The trend is that many organizations are seeing their environments evolve into shared services frameworks and the centralization of content management is one of the driving factors. It is important to point out that Microsoft typically does not develop vertical or point solutions; they develop applications, platforms and tools.

At first glance, Microsoft SharePoint appears to have functionality of an advanced ECM system. In many cases there are redundant functions with Commercial off the Shelf (COTS) Electronic Document Management Software. However, extensive work is typically required to create an ECM solution from scratch on top of the SharePoint platform to obtain the functionality of an “out of the box” ECM solution.



The above chart illustrates that it is important to keep in mind that license is only one part of the Total Cost of Ownership. In fact, SharePoint customization could also make future upgrades more expensive.

Findings with Microsoft Office SharePoint Server as it relates to Advanced ECM

If you search the Internet you will find many articles and blogs that express the following:

- Migration within the MOSS product path is not fool-proof and can be quite painful.
- Migration from another system into MOSS results in high fees for consulting work
- Built-in search is difficult to modify to your own criteria.
- Integration to MOSS is not easy at this stage. Such as; Lists are not saved in SQL tables – but in SharePoint tables stored in SQL server.
- There is a big concern that SharePoint is not ready as a repository for Records and Document Management.

FileHold Value to a Deployment of SharePoint

There is overlap between SharePoint and FileHold. They both have a repository, they provide library services (view, check out/in, etc.) and they both have clients, etc.

FileHold adds value when your requirements also include:

- Transactional content like scanned images
- Documents created by CAD systems
- Redaction
- Bulk ingested content
- XML-based content
- Report output
- Inactive content and long-term archiving

FileHold's deep integration into the Microsoft architecture means you already know how to use it. FileHold uses the familiar Explorer view paradigm and mimics your current office filing structure of Cabinets, Folder Groups, Folders and Documents. FileHold's 'ease of use' results in a broader base of users using advanced content management functions with greater control and management of content.

"Out of the box" FileHold provides:

Image Capture and Indexing

- Taxonomy
- Auto-classification

Library Services

- Document Checkout/in
- Version Management
- Search
- Hardcopy Document Tracking

Document Workflow

- Process-driven Document Workflow
- Advanced document Numbering utilities

Security and Compliance

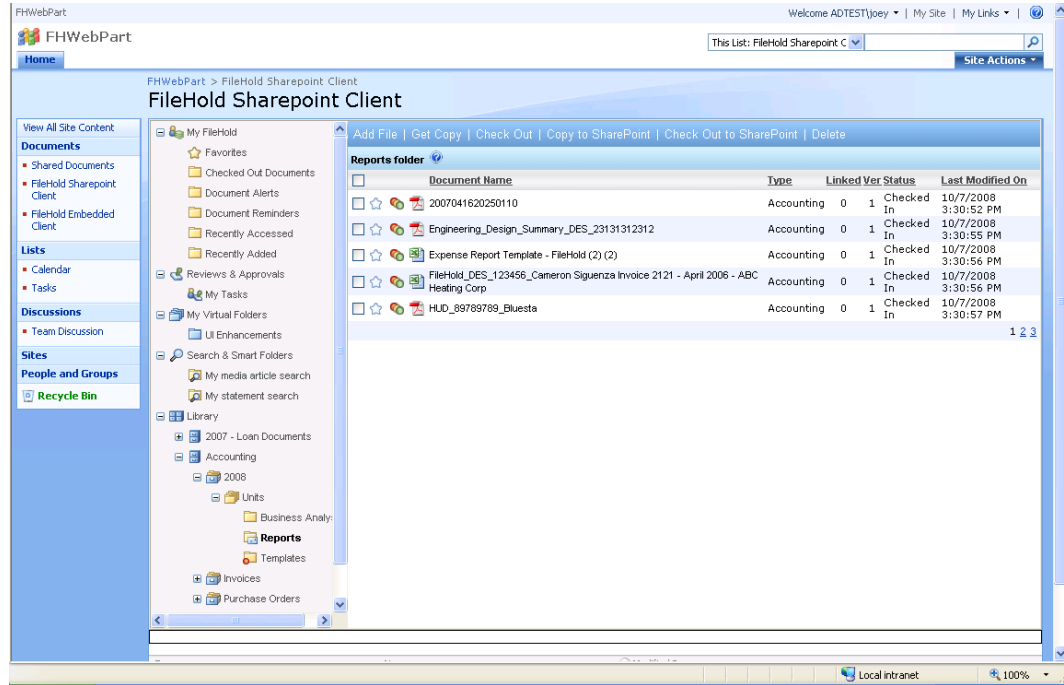
- Records Retention Policies
- Robust Security
- Audit trails and reporting

note – It is important to be aware that with the SharePoint Connector you still have the option to install the FileHold Desktop client on Power Users computers. They will then receive capabilities not available in a SharePoint environment.

(e.g. *Drag and Drop* – see 'Power User Capabilities with FileHold Desktop Client').

FileHold SharePoint Connector

Co-existence of FileHold with SharePoint used as the corporate portal can help provide a ‘best of both worlds’ approach that satisfies most if not all business requirements. With the FileHold SharePoint connector advanced ECM can be available as part of an overall IT infrastructure available to all users. Deployment to users is measured in minutes instead of the days or months required for customization by IT resources on the SharePoint development platform.



FileHold Web Part Screenshot

The FileHold SharePoint connector supports integration with SharePoint in two ways:

SharePoint Document Management Web Part

The SharePoint Document Management Web Part allows you to place a portlet on any SharePoint page for integrated access to FileHold. Using the SharePoint Web Part, users can browse repository files and perform most document management functions, including:

- Display and access all documents in repositories
- Display a project’s folder hierarchy, allowing users to navigate into the folder structure
- Display “saved search” allowing search result views to be customized to a portal’s audience

SharePoint Document Management Repository

- The FileHold SharePoint Connector allows users to collaborate on documents in their native SharePoint environment and then reassign them to FileHold for management in the enterprise repository.

Power User Capabilities with FileHold Desktop Client

With the FileHold SharePoint Connector you still have the ability to install the FileHold Desktop client for Power Users. The desktop client gives you the following additional capabilities not available in a SharePoint environment:

- **Smart Check Out / In** – with Smart Check Out if a user opens a document and begins to make edits to it without checking it out of the library FileHold prompts them to do so the first time they save. With Smart Check In if the user saves or closes their document without checking it back into the library FileHold prompts them to do so.
- **Drag & Drop Emails from MS Outlook to FileHold** – users are able to drag and drop multiple emails (with attachments) from Outlook to the FileHold Web Part for quick addition to the FileHold library.
- **Full Featured Document Viewer** – an inexpensive optional document viewer providing all in one viewing, markup, redaction, annotation, watermarking, printing and publishing of documents stored in and out of the FileHold library.
- **Offline Synchronization** – you can synchronize files stored on your local computer with files in the FileHold library.
- **Group and Sort Documents in Folders by their Metadata** – users can quickly group files in any folder using any of the metadata fields displayed in the folder. Once grouped files can then be quickly sorted using the columns displayed.
- **Assign Access Rights at the Cabinet or Folder Level** – system and library administrators can assign access rights (roles) for users at the cabinet or folder level overriding the rights inherited from the global setting or parent cabinets (in the case when roles are assigned at the folder level)
- **FileHold *FastFind*** – an optional feature that allows users to establish “hot key” links from 3rd party applications to FileHold. Upon pressing the hot key the user is transferred to the FileHold search engine and all documents that are associated will be brought up in FileHold for review. The user can select the appropriate document and; review it using the FileHold viewer, open it in its native application for further work, or even initiate a workflow and send that document to a colleague for approval.

Conclusion

FileHold recognizes the power of SharePoint but also realizes that more robust record management requirements are likely going to require a more mature tool for the foreseeable future. It isn't likely that Microsoft will grow SharePoint into a true enterprise content management system. ECM vendors will continue to dominate in the areas that SharePoint is not prepared to address. I believe that they will certainly mature in the enterprise areas but never really address it to the level that a true ECM system will.

Things to consider:

- Take an inventory of existing content management systems and the usage patterns associated with them. Look closely at the overall costs and effort to maintain or upgrade them (*e.g.* Customization costs, Document Capture and Imaging license costs, Document Viewer license costs, etc.) This may be the time to collapse your current Legacy ECM platforms and move them to FileHold.
- Consider FileHold in a WSS environment as a starting point when business forms and Business Intelligence are not yet required. This allows you to avoid buying more than the enterprise requires. Your organization can leverage the content, web parts and templates when an upgrade to MOSS is required.
- Experts in ECM are recommending that quickly changing information that requires initial ad-hoc collaboration should reside in SharePoint. Once the information is closer to finalization you should then place the content in a "System of Record" where you can trust to find the correct, latest or final version. They also recommend moving high value content and records out of MOSS. This approach results in strong audit and chain-of-control information critical for a discovery process.
- Consider TCO including long term support and upgrade strategy.



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About

Blueskies Consulting is a vendor-independent organization of consultants that provide consulting services for print and document management systems.

Keith Corbett – Blueskies Principal, has over 25 years experience in Information Systems primarily focused on Print and Document Technology Consulting in Western Canada. Keith's formal education is a Communication Electrician Degree and is supplemented by significant Training/Certifications from vendors including IBM, Xerox, EMC, SCO, Novell, and Microsoft.

His consulting, Project Management and Implementation services have been in the areas of Electronic Document Management Systems, Report Distribution Systems, Document Automation Systems, Forms Automation Software, Intranet Document Servers and Print Assessments. In addition to establishing Blueskies Consulting he has been employed by Xerox as a Senior Systems Consultant and Konica Minolta as a Strategic Market Sales Specialist.