

Enterprise Content Management (ECM) Notes and Considerations  
Loyola University Chicago  
Information Technology Services  
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Definition of "Enterprise Content Management" – range of technologies used to manage content ranging from document management, imaging, and workflow to web content and digital asset management.

Why? – The growth in volume of the content is explosive. New regulations have emerged and new business practices require more diverse access to the content. Organizations need some new approaches in place to manage this change. New policies and processes will need to be developed and a new IT infrastructure will need to be in-place to support the objectives. We need to develop a strategy, understand the life cycle of our content, assess how the content is being used across the enterprise, map potential solutions to the specific business objectives, develop a process for evaluation of solutions, and recognize the tradeoffs in our approach (e.g. best of breed vs. integrated approach, multiple units vs. enterprise solution).

Potential Challenges could include; lack of structure or methodology, too much analysis, unrealistic time lines and expectations, divided attention, uncertain scope, and a tactical rather than strategic focus.

Evaluation Criteria to be considered for ECM solutions:

- Functionality
  - Document Management (Library functions, search, etc.)
  - Imaging (scanning, indexing)
    - Strong needs exist for imaging in Registration & Records, Human Resources, Wellness Center to name a few.
    - Image considerations – Use products that output to TIFF format for image documents, output to XML or RTF for text output. Output to PDF is also strong for consideration.
    - We can consider outsourcing imaging needs until an enterprise solution is in place. This may be a good option if our volume is high and security concerns don't prevent it. We could also setup a temporary "imaging" shop in house while the ECM process evolves.
    - Scanner solutions need to support TWAIN and ISIS, which are industry standard interface standards.
  - Workflow (Process, approvals, etc.)
    - Current imaging solutions (e.g. Imagio don't necessarily have a workflow component)
  - Records Management
    - Regulations, policies, Records Retention and storage policies have been established and workgroups have been formed. See M.Beane for more info.
  - Web Content Management
    - A WCM solution is being looked at now by IS and MCS working together so support web initiatives, see M.Nowesnick or B.Montes for more info.
    - This group will recommend a solution that is "XML" based, which will allow content to easily flow to an enterprise solution later if one emerges.
  - Collaboration (allow multiple people to work on documents together)
  - Output Management (print, web, etc.)
  - Digital Asset Management (search, metadata, etc.)
- Cost
  - Initial System Costs (Hardware & Software)

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- Initial setup of an enterprise ECM solution will start around 250K and will quickly get to seven figures within two years.
  - Ongoing Maintenance Costs
  - Consultant Costs for Implementation?
- Service & Support
  - What professional services does the vendor provide?
  - What support programs does the vendor provide?
  - What are our critical requirements that the vendor needs to know?
- Technical Architecture
  - Platforms (How many servers, users, etc.)
    - IS recommends a UNIX base operating system, but can support Windows server environments.
  - Scalability (Capacity to accommodate growth demands)
  - Usability (training issues)
  - Manageability (What happens when business priorities change?)
  - Application Development Tools
  - Security Management
  - Standards
- Viability
  - Will the vendor survive the volatile market of ECM?
    - This market is constantly changing, with large vendors like IBM and Stellant quickly consuming smaller players.
  - How committed is the vendor to ECM?
- Vision
  - Does the vendor have a strategic plan?
  - Does the vendor have a roadmap for their product?
  - How does the vendor plan on fulfilling customers service needs?
- Integration
  - How will the products integrate with our current architectures (e.g. PeopleSoft, Lawson, etc.)
  - What skills and customization will be required on our part to integrate the product?