

IS A SHAREPOINT-BASED SOLUTION RIGHT FOR YOUR ORGANIZATION'S DOCUMENT MANAGEMENT AND COLLABORATION NEEDS?

What began as a simple collaboration utility in 2001, and morphed into a portal product in 2003, has become, at least in Redmond's eyes, a full-blown information management platform in 2008. Together, Windows SharePoint Services (WSS) and Microsoft Office SharePoint Server 2007 (MOSS) are not just a content management system, knowledge management system or portal, they're just "SharePoint."

Clearly, SharePoint has become a central server platform for Microsoft, a venue for integrating basic Office products as well as various other Microsoft enterprise applications in a single environment.

At the Microsoft-sponsored SharePoint Conference 2008, Bill Gates shared that Microsoft had licensed more than 100 Million seats to the platform that generated more than \$1 Billion. To be sure, many of those seats fall under enterprise license agreements and may not reflect actual usage, but even if a fraction of those users actually log into SharePoint each day, it makes for the most significant and fastest growing information platform on the market today.

However, what remains less clear more than a year after the launch of SharePoint 2007, is where the product actually fits into the enterprise. SharePoint is truly a collection of individual components that interact together in varying degrees, but require extra work to weld into a cohesive package. Unfortunately not all components of SharePoint are created equal. In other words, SharePoint is well suited to some requirements, but certainly not all.

Our aim is to provide an independent and unbiased guide as to what works and what doesn't, when to leverage SharePoint and

when to avoid using it as it relates to enterprise document management.

Out of the box, SharePoint provides a simple and popular file-sharing experience, built on top of its underlying repository and application services. From there, the product quickly exposes a set of other services, ranging from search to wikis to dashboards and more.

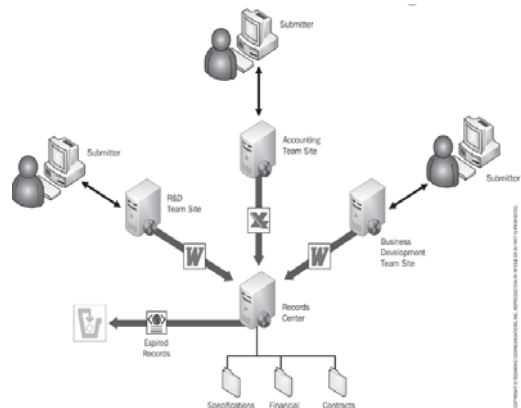
EIGHT BUSINESS SERVICES

SharePoint can be divided into eight business services:

- Collaboration Services
- Enterprise Content Management Services
- Web Content Management & Publishing Services
- Portal Services
- Business Intelligence Services
- Forms and other Process Services
- Enterprise Search Services
- Application Development Services

This solution paper focuses on SharePoint's Enterprise Content Management Services identifying common scenarios against which SharePoint can be judged. Understanding the functional scenarios that fit better or worse in SharePoint will help you answer the question:

"Is SharePoint right for your organization's document management needs?"



EVALUATION OF SHAREPOINT'S ENTERPRISE CONTENT MANAGEMENT SERVICES

With the current version of SharePoint, Microsoft has started liberally using the "Enterprise Content Management" (ECM) alias. Indeed, Redmond is positioning SharePoint as its first real Enterprise Content Management (ECM) platform. While SharePoint does nominally offer several core ECM services, it does not provide complete ECM functionality. Of course, the term "enterprise" can be misleading and unnecessary since some document management scenarios are simple and localized, and therefore well suited to a lighter weight tool like SharePoint. Other ECM scenarios involve complex, inter-departmental processes that do indeed require a more scalable and extensible product than Microsoft can provide right now.

For the most part, SharePoint wants to handle Office-type files, and not large repositories of scanned image files that document that are not Office-types or are some transaction or another. Many observers do not consider SharePoint an "ECM" system but rather just a collaboration system. Others believe that there is a role for managing desktop files as enterprise assets, and within these constraints, SharePoint can play that role in some scenarios. Nevertheless, true Document Management typically requires more sophisticated security and rules – as well as more formal taxonomies and classification needs – and SharePoint is comparatively weak in these areas.

On the plus side, managing documents is nearly seamless if you're working within Office applications. Basic functions such as check in/out and version control are delivered in a simple manner, and if your ECM needs tend toward collaborative file management at the departmental level, SharePoint could offer an excellent fit.

Records Management functions are slated to be released later in 2008 as an add-on to MOSS 2007.

However, records management within SharePoint is still very much about tracking a very small percentage of your content and only within the context of a document in the records center. Not exactly an enterprise solution.

SharePoint can serve as a portal on top of your existing imaging and document management systems. SharePoint and document management systems can be used together to allow businesses greater control over corporate information management by leveraging SharePoint as a portal and enhancing its basic file sharing and data management functions with the sophisticated metadata management, native imaging, large file support, data security and workflow for which document management systems are known.

Other software vendors are highly motivated to develop connectors, but most of them expose only basic repository services, before bumping the user from SharePoint to the native application itself.

Overall, SharePoint is a light player in the ECM space, but it's not ready for large ECM deployments. Whether it's a lack of good enterprise metadata management, no native imaging or large file support, or its somewhat myopic focus on files, SharePoint is really trying to make ECM fit its model and not the other way around.

IN SUMMARY

SharePoint is not a product that can or should be deployed out of the box for ECM or any other use.

The depth and complexity of SharePoint's underlying layers means IT needs to get involved at the beginning of any SharePoint

effort, and then stay involved throughout the lifecycle of the application.

Likewise, business units cannot abdicate their responsibility for defining solutions that addresses real enterprise objectives, like invoice processing for example. Steer clear from vague promises that “SharePoint can do anything”. SharePoint’s enigmatic platform – is a platform that seems so easy to use but so difficult to master.

The charts on the following page summarize our findings.

SHAREPOINT ECM COMPARISON

SharePoint's ECM Strengths

- Very useful for simple file sharing
- Focuses on the collaborative aspects of ECM that are paramount to many knowledge workers
- Easier to install, features strong Office integration and is comparatively more user-friendly than heavyweight ECM tools like Documentum, IBM, and Open Text, Oracle/Stellant and FileNet. However, still is difficult to customize and maintain; administrators can easily get in over their head. Skilled Resources can be hard to find.
- As an internal collaboration tool for small groups that only use Microsoft documents that do not require true document management or complex project management. Most value from enhanced Office integration will come to those enterprises concurrently upgrading to Office 2007. Customers on older versions of Office may find their usability mileage varies.
- As a document management system when organizations don't require metadata, security, audit trails, and other enterprise-class content management and collaboration capabilities
- Simple records management solution once records management services become available sometime in 2008.

SharePoint's ECM Weaknesses

- Comparatively very light or non-existent support for document imaging of paper, faxes, PDFs; digital asset management; COLD/ERM
- Offers no integrated enterprise-class support for non-Office documents such as CAD files and PDFs unless you install what's known as an "iFilter" for each non-Microsoft file type, and limited—if any—support for Mac applications, open source design programs, and non-Microsoft Web browsers such as Mozilla Firefox
- Ill-suited for capturing, processing, and ingesting large volumes of documents, making such tasks highly laborious
- Repository restricts individual file size to 2 Gigabytes, limiting value in multimedia environments
- Limited repository storage - limited to store 50 million documents
- Poor support for managing collections of heterogeneous documents
- No native support for hierarchical metadata schemes and globally-controlled vocabularies limits usefulness in enterprise settings
- Simplistic approach to content types may lead to proliferation of myriad types and subsequent difficulty applying enterprise-wide rules and processes
- advanced search capabilities are limited
- Limited folder processing functionality limits the native "intelligence" of the system
- Lacks retention, archiving, and other lifecycle management services short of formal records repository
- Workflow limitations may preclude adoption for interdepartmental processes in enterprise-wide environments
- Basic processing and enhanced workflow capabilities require add-ons and plug-ins, and no capability for defining rules for folders, content expiration, and management reporting exists
- Modest version control is included but lacks best practices standardization
- Security options lack the flexibility and control to conform to the complex regulatory and organizational requirements of many companies
- Emphasis on localized, bottom-up site provisioning tends to encourage departmental free-lancing that can mitigate against enterprise governance
- Likely a poor fit for large enterprises that need a one-stop-shop for ECM or that have industrial-strength ECM or compliance needs
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ECM SCENARIOS IN SHAREPOINT

- Document Imaging and Capture
- Document Management
- Records Management
- Digital Asset Management
- COLD/ERM
- Content Integration

FIT

- Poor Fit*
- Unlikely Fit**
- Unlikely Fit**
- Unlikely Fit**
- Poor Fit*
- Poor Fit*

***Poor Fit: SharePoint is very unlikely to match this scenario, requires major extension and/or other products**

****Unlikely Fit: SharePoint is unlikely to address this scenario effectively, requires substantial customization and/or other products**