

CONTENT, DOCUMENT and KNOWLEDGE Management **KMM**World

ECM: Collaboration rules!

By Judith Lamont - October 2008

Enterprise content management (ECM) is becoming increasingly "socialized," with more Web 2.0 functions being incorporated into it.

"We are seeing a refocusing on collaboration through the intersection of content and social media," says Leonor Ciarlone, senior analyst at [Gilbane](#). "Content management infrastructure provides the core environment to make collaboration information-centric and is now adding blogs, ratings and other social media."

[R.V. Anderson Associates](#) (RVA) is a consulting engineering firm with more than 200 employees and a broad range of projects oriented around multidisciplinary engineering. Serving primarily eastern Canada and India, its offices are geographically dispersed. Information resources were similarly scattered across different sections of the company, and were not easy to find when needed. Also, a number of senior associates were planning to retire, and RVA did not want to lose track of the intellectual capital those staff members had contributed.

Some documents were stored in TextWorks, a document management product from [Inmagic](#). It had been used for many years to manage marketing material, such as information used in generating proposals. However, RVA wanted to extend its document storage and retrieval capabilities to all its divisions, including technical, administrative and marketing. Moreover, RVA wanted to develop a more collaborative work environment. Although the company looked at a half-dozen software products, the best fit turned out to be Presto, another product from Inmagic.

Appealing capabilities

"We found that Inmagic's Presto 2.0 brought exactly the new capabilities we were seeking," says Terri Zimmer, supervisor of information management at RVA. "We wanted something that had Web 2.0 features such as RSS feeds, and that needed very little support from the IT department."

The .NET infrastructure provided the flexibility and ease of development that now allows the company to bring together those diverse pieces and form communities around the information. Previous experience with Inmagic convinced Zimmer that backend support for Presto would be easy, and their longstanding working relationship was also a big asset. "We quickly arrived at a 'go-forward' moment," Zimmer says.

"Our usage rate is about 90 percent," she adds, "which we attribute to both the value of our content and the ease of use of Presto."

Finding detailed information on previous projects, or contact information for references, now takes a matter of seconds. Searches can be done using metadata that is assigned when the document is saved.

"For contact information, we wanted resumes to come up first on the list," Zimmer explains, "so we set up the coding system to make sure that happens." Users like the full-text search as well,

because they can type in a word or phrase and receive all the information without having to be exact in their search requirements.

Employees can request notification if new documents are published on a particular topic. "The availability of RSS feeds means that our workers don't have to constantly check knowledge repositories for new information," Zimmer adds.

At present, RVA has a separate Web content management (WCM) system but plans to use Presto as the source of some of the information to minimize duplicate storage and ensure consistency. The imminent launch of the next version of Presto, which will have functions that Inmagic describes as "social knowledge management," has generated considerable interest at RVA.

Social knowledge networking

"The junior engineers are especially eager to use those new tools," says Zimmer. "Blogs and wikis are part of their lives outside of the office, and it's very beneficial in terms of collaboration to have them available in a corporate setting."

Zimmer expects that the new resources will help build bridges between workers in different locations and provide a broad base for ongoing collaboration.

"We did not want to have to use different software products for blogs, wikis and content management," she emphasizes. "We wanted an integrated environment for creating, storing, searching and using the information."

Social knowledge networking differs from social networking in that it is geared toward "enhancing content by connecting people," as Inmagic states. The basic premise of Presto is to combine a knowledge repository with an interactive community.

"People are connected by the issues and problems they need to address, not by the departments they are in," says Phil Green, CTO of Inmagic. "The one-way model of 'publish and they will consume' no longer applies. We believe that tightly integrating content and community in a robust environment will produce a rich and relevant knowledge repository that helps people solve problems more effectively."

Putting a human touch into ECM through Web 2.0 may make the applications more interesting to work with, but clear value will have to be derived from those additions in order to be justified.

"There is certainly exciting potential for integrating content repositories with social media," says Gilbane's Ciarlone. "The real test of incorporating Web 2.0 functions into KM, however, is whether it increases enterprise productivity. Adding social features such as ratings for content will have to drive productivity and revenue streams in order to be justified."

It's too soon to tell whether that goal will be achieved, but the trend deserves close monitoring.

Collaboration through process for SMBs

Completion of a business task often entails moving documents through a workflow process. In the small to medium-sized business (SMB) market, options for both content management and workflow have been limited because vendors initially focused on large enterprises, but some products are now targeted specifically to that market. [Cabinet NG](#) (CNG) provides file management, workflow, application integration and retention for organizations with just a few employees or as many as 500.

[McGregor Interests](#), a commercial property management company based in Nebraska, uses Cabinet NG's CNG-SAFE to manage its documents and accomplish its business processes. Documents that are created or arrive in electronic format are stored directly in the repository in their native format, while those that may arrive in hard copy, such as invoices and leases, are scanned in.

Cabinet NG's workflow application sends documents to individuals who need to take action on them. "Whenever paper comes in the door, it is scanned and routed to the appropriate individual," says David Mooney, controller at McGregor. For example, when invoices are received, they are routed to the individuals who need to approve them and then to those who pay them.

Mooney continues, "We have business rules set up that send the invoice through a workflow that depends on the value of the bill we have received. By the end of the day, everyone who needs to see that document has seen it, and it can be processed."

Users can add notes to the document as it moves from one person to another so that everyone has access to information that relates to that document or process. CNG-SAFE also tracks the path the document took so there is a record of its progress. Security features allow access to be controlled down to the document level, so that a particular individual may not be permitted to edit an invoice, or may be allowed to see it but not interact with it.

Improved search

"We can control who can see the document or who can change or delete it," Mooney says. Retention policies can also be set for documents as they are created.

CNG-SAFE is used at McGregor to file everything from e-mail to Excel spreadsheets. Files from different applications are stored in folders that relate to a particular client or project. Documents that originated in one application and are saved in CNG-SAFE can be viewed from other applications through Cabinet NG's Retriever module.

Mooney is enthusiastic about the search engine, which has been enhanced since the application was first deployed. "We can find information very quickly," he says, "and even if it's been misfiled, we can locate a document through the full-text search capability." The search engine supports stemming, fuzzy search and phonics searches.

SMBs typically do not have IT support for integrating multiple applications, so having multiple functions in one product lets those companies gain capabilities that would otherwise be difficult to achieve. Business process management (BPM) is bundled into CNG-SAFE, for example, as are the scanning and search modules.

"Retriever provides document retrieval integration with virtually any Windows-based application, such as Act and Outlook," says James True, VP for business development at Cabinet NG. "On the backend, the Synchronizer product ties into the third-party application's database, updating CNG-SAFE if contact information is added or changed."

Integration with other applications helps prevent duplicate work and increases efficiency. When

scanned invoices are filed, a transaction can be automatically created in QuickBooks, [Intuit's](#) accounting product for small businesses, using CNG-Books. Data is entered by an operator, who then simultaneously sends that information to QuickBooks and stores the image into CNG-SAFE with a single click.

"Users who are working in QuickBooks can pull down an invoice or any other image associated with that transaction, without leaving QuickBooks," True says.

Collaboration, whether through social media or business process management, adds value to content and supports working relationships

Automating document conversion

Compound document assembly and rendering are key functions of many ECM products. Solutions from [Adlib Software](#) automate the process of converting and compiling complex documents for such actions as submission to the [U.S. Food and Drug Administration](#) (FDA).

Adlib Software's Conversion Server can convert 300 file formats, without the application being present, and output to text, TIFF, HTML or PDF. Recognition Server can convert scanned documents and TIFF files to searchable PDFs, while Publishing Server binds documents originating in multiple formats ranging from PowerPoint to MS Word and PDF, into an electronic common technical document (ECTD), the format used for FDA submission.

"The amount of time to build these documents is significant," says Chris Yardley, marketing manager for Adlib Software, "and that erodes time-to-market."

The company's products can also be used to convert paper processes to electronic ones. The city of Rochester, Minn., for example, formerly sent employee pay stub information through the mail. Now, Adlib Software accesses the employee's e-mail address and employee ID from a database, pulls out the pay information, converts it to a PDF document and delivers the document electronically. That change has saved thousands of dollars in paper and postage, and speeded delivery.