

ECM: A Survey of Must-Have Features and Functions

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Purpose of presentation

- Audience
 - Considering implementing an ECM application
 - Considering expanding a previously acquired ECM application
 - Considering replacing an aging ECM application

Purpose of presentation

- Usefulness
 - Conducting needs assessments to determine functional requirements
 - Preparing technical specifications for incorporation into RFPs or other procurement documents
 - Comparing and evaluating ECM products

Some Definitions

- Electronic Content Management (ECM)
- Electronic Document Management (EDM)
- Electronic Document Imaging
- Records Management Application (RMA)
- Digital Asset Management (DAM)
- Email Archiving Software
- Social Media Archiving Software
- Digital Preservation System

Topics to be covered

- Company background
- Implementation options
- Digital content management features
- File organization and indexing functionality
- Retrieval functionality
- Access control and security
- Retention functionality
- Other features and functions

Company background

- Availability
 - Direct sales
 - Authorized business partners and resellers—local and regional
- Year established
- Type of ownership: public or private
- U.S. headquarters location

Company background

- Ownership history
- Product offerings –different applications for different markets
- Installed base
 - Number and type
 - New installations

Implementation options

- On-premises installation vs. cloud implementation
- Hybrid implementation
- Advantages and limitations
 - Ease of start-up
 - In-house expertise required
 - Implementation time
 - Implementation support from software developer or reseller
 - Cost comparison: up-front vs. recurring costs
 - Software maintenance and technical support
 - Functionality comparison

Digital content management features

- Types of recorded information supported – not limited to documents
- Content aggregation
- Multiple content repositories—useful for a shared installation
- Multiple file formats

Digital content management features

- Version control—tracks revisions, limits access to obsolete versions
- Document imaging module
- OCR integration
- MS Office integration

File organization and indexing functionality

- User-defined file plans / taxonomies
- Folders and subfolders nested to multiple levels
- User-defined metadata fields
 - Descriptive metadata
 - Indexing metadata
- Derived metadata—computed or extracted from other data
- Embedded data
- Picklists
- Multi-value fields
- Full-text indexing – may be applied selectively
- Automatic categorization

Retrieval functionality

- Repository browsing through folders and files
- Metadata search – novice and advanced modes
- Full-text search
- Search capabilities
 - Boolean operators
 - Relational expressions
 - Search term truncation and wildcard searches
 - Proximity searches
 - Synonym searches
 - Fuzzy searching
- Stored searches for repeated execution
- Document viewing options—native application vs. multi-format viewer

Access control and security

- Access controlled at repository, folder, and file levels
- User privileges
 - Content capture and indexing
 - Viewing
 - Editing, annotating, and redacting
 - Downloading, copying, and exporting
 - Moving and replacing
 - Deleting
- Check-in / check-out
- Audit trail—tracks and records every action on file from capture through removal

Other features and functions

- Web client
- Mobile apps—Android or iOS
- Outlook client
- Workflow / process automation
- PDF rendering
- Encryption
- Federated search—internal repositories and others with single command, assuming appropriate indexing

Other features and functions

- Integration tools
- Document annotation
- E-sign integration
- External collaboration workspace for secure content sharing
- Public access portal
- Digital access management module
- Physical records management

Some Final Points

- Infrastructure compatibility
- Out-of-the-box functionality
- Commercial availability
- Product viability
- Scalability
- The reseller's role

Thank You.

Send in your questions.