

The SharePoint ECM Debate

Is SharePoint an ECM system, or isn't it? How is it transforming the ECM landscape? Our expert panel tackles these and other tantalizing questions.

by Ken Congdon

PANELISTS



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Since its inception in 2001, well over 100 million SharePoint licenses have been sold to businesses throughout the world. There's no denying the platform's popularity as a business collaboration tool, but what has been fervently debated in ECM industry circles is SharePoint's viability as an ECM platform. *ECM Connection* recently asked a few industry vendors and solutions providers with direct ties to Microsoft and SharePoint to weigh in on this debate.

Q: WHAT ROLE DOES SHAREPOINT PLAY IN THE OVERALL ECM PICTURE?

Randash: SharePoint follows the 80/20 rule in that we "guesstimate" that roughly 80% of organizations will find that SharePoint can meet their ECM needs. The other 20% may require additional functionality or mass-scalability. SharePoint has proliferated as mostly a collaboration platform, but it does so many things very well, including ECM.

I have actually grown tired of the debate around whether or not SharePoint is a true ECM system. It defi-

nately is. The number of SharePoint installations is staggering, and almost every installation is effectively managing multiple types of content.

Dickerson: SharePoint is making ECM a true enterprise solution that is very easy to deploy. Furthermore, the user adoption of SharePoint has been much higher than legacy ECM solutions, allowing ECM to become a mainstream business application. SharePoint is not an out-of-the-box ECM solution, but it gives you a strong platform to build on. There are very few companies today that aren't using SharePoint as a collaboration tool. Therefore, the look, feel, and usability of SharePoint is already familiar to customers. Therefore, companies don't feel like they have to learn something new when they leverage SharePoint as the front end of their ECM solution.

Q: WHAT ECM FEATURES DOES SHAREPOINT OFFER? WHAT DOES IT LACK?

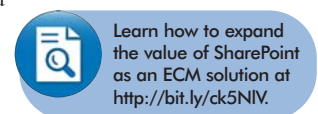
Randash: SharePoint offers several ECM features including check-in/check-out, version control, metadata

management, a repository for multiple data/document types, search, support for electronic exchange and collaboration on documents, and workflow. The upcoming 2010 version of SharePoint improves on the ECM features of its predecessor with persistent document IDs (a "permanent" unique identifier for each document), enterprise metadata service, enhanced records management capabilities, integrated Web content management, and improved workflow and process transparency.

SharePoint still lacks document capture and imaging, but I am not sure Microsoft will ever be interested in addressing the imaging component of ECM. This approach is really no different from what ECM vendors have been doing for years. Many of the top ECM software vendors of the last decade relied on third-party document capture and imaging viewer vendors to provide scanning, OCR (optical character recognition), bar code recognition, and other image-centric functionality like viewers and markup editing.

Wang: If you ask some folks, SharePoint 2007 provides everything you need in a content management solution. But is that true?

First, SharePoint does not have imaging capabilities. It's hard to understand the strategy of creating an extra layer between the point of content capture and creation versus managing the content, but I can accept that Microsoft does not include this capability in SharePoint in order to let its expert partners do their thing. However, workflow is a





separate issue. SharePoint builds on a popular workflow engine: Windows Workflow Foundation (WWF). A common knock on WWF is that everything requires program-mable work. SharePoint Designer supposedly combats a lot of this, but as we know in high tech, there is often a lag time between hype and adoption — or sometimes even reality. All I know is that solutions with an intuitive, drag-and-drop user interface for creating workflow rules off the same WWF engine would not be popular if the out-of-the-box experience of SharePoint's workflow capabilities already adequately addressed customer expectations.

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Dickerson: SharePoint is a good document repository, and it has some basic built-in records management capabilities for information management and document retention. However, SharePoint lacks the ability to perform metadata searches, which is key to an ECM solution. Finally, some of the SharePoint reporting capabilities are weaker than that of some legacy ECM systems.

Q: HOW IS SHAREPOINT IMPACTING ECM PURCHASING HABITS?

Randash: I think purchasing habits have changed dramatically. Organizations now seem to be turning to the platform vendors (e.g. Microsoft, Oracle, IBM, etc.) first for ECM solutions. If they can't meet their requirements with these vendors, then they turn to the other ECM vendors. I believe the days of the small niche ECM vendors are numbered, unless they are a critical piece of a larger business solution.

Wang: I feel SharePoint's role in ECM has confused the end user community to a certain extent. A common scenario is that customers suddenly find that they have SharePoint and, for good reason, decide now is the time to make good use of the solution. However, the user's understanding of SharePoint is typically minimal. While they do exist, it is rare to find a CIO or IT director that truly understands the value proposition SharePoint brings to the table alongside an ECM solution. Those who do are still buying from ECM vendors that are strong in transactional content management and repeatable processes and integrating these systems with SharePoint.

Dickerson: We're finding that several clients that have already deployed legacy ECM systems don't like the user interface. These companies want to leverage SharePoint as their front end collaboration portal to interface to all of their legacy line-of-business applications, including ECM solutions.

Q: WHY ARE SO MANY ECM VENDORS CLAMORING TO PARTNER WITH MICROSOFT?

Randash: Due to the adoption of SharePoint, traditional ECM providers are being forced to find an approach to coexist and enhance the user experience that SharePoint provides or be forced out of the equation. With SharePoint becoming a part of the infrastructure in many organizations, SharePoint-based solutions are quickly embraced by the IT organization since it's offered on a platform they are already using and at a reasonable price point.

Furthermore, many organizations are interested in SharePoint for new ECM projects, but they already own solutions from other ECM vendors. The legacy ECM solutions usually have a large repository of documents, and the organizations made a significant investment in the total solution. It becomes a win-win if the organizations can continue to let SharePoint proliferate without hav-

ing to immediately convert the repository managed by the "traditional ECM vendor." The traditional vendors have also historically provided more depth in specialized ECM areas like workflow and records management. Therefore, integration between their products and SharePoint allows an organization to leverage the best of both worlds.

Q: WHAT ARE SOME BEST PRACTICES FOR INTEGRATING SHAREPOINT WITH LEGACY ECM SYSTEMS?

Wang: The first step should always be to understand the purpose of the integration and the business problem the integration will solve. More configuration and less customization is key to maintaining an integration that works and is affordable, especially when you factor in the total cost of ownership of an ECM system plus SharePoint.

Randash: Content Management Interoperability Services (CMIS) is one industry initiative worth watching for ECM integration. It is encouraging to see the ECM vendors, including Microsoft, working together on a standard approach to work with multiple repositories. This standard will hopefully allow interoperability between multiple vendor ECM repositories. I think this helps SharePoint become the center of the ECM universe, but it also allows other vendors to participate in an integrated ECM platform for the enterprise. You can find out more about this initiative at www.oasis-open.org/committees/cmis/.

Dickerson: You want to make sure that you're not duplicating work within the SharePoint environment. For example, some companies may already get existing reports from their legacy ECM systems and try to recreate everything in SharePoint. This practice just doubles the work and makes your processes more inefficient. You want to ensure SharePoint simply serves as the pathway for reporting and custom flows. You don't want to recreate that work in order to leverage SharePoint. ■