The Future of Enterprise Content Management

**Guidelines for transforming your ECM system to ECM 2.0
with SharePoint 2007 and DocAve**

This document is intended to aid IT administrators and other stakeholders responsible for deploying and managing an Enterprise Content Management (ECM) system for their organization. This document briefly outlines the key components and objectives of any successful ECM system, and provides guidelines for meeting these objectives with the industry's most powerful technologies.

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Unleashing the Power of SharePoint™

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Building the Next Generation of ECM

Enterprise Content Management (noun): The strategies, methods, and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM tools and strategies allow the management of an organization's unstructured information, wherever that information exists.

The goal of an Enterprise Content Management (ECM) system is to connect the people, processes, and information of an organization. A successful and effective ECM system is not merely an application that organizes and stores content, it is a fully-integrated platform and architectural framework that enables unfettered collaboration, stewards enterprise content throughout its life-cycle, and empowers greater productivity. An ECM system is an organization's virtual *eco-system*.

For many reasons, Microsoft SharePoint Products and Technologies™ are positioned to become the backbone of the next generation ECM systems. Fully-integrated with the productivity tools knowledge workers already use, imbedded with best-of-breed enterprise search capabilities, easily customizable and eminently scalable, SharePoint is considered by many experts to be the foundation for ECM platforms of the future.

But how do you take a flexible and expansive platform like SharePoint and transform it into the powerful and efficient ECM system your organization demands? How do you unlock the ECM potential already imprinted in SharePoint's DNA?   To unleash SharePoint's full ECM capabilities, you must fortify it with appropriate infrastructure management support. You must supplement SharePoint's native ability to connect people, processes, and information with powerful data protection, administration, content management, storage optimization, compliance, and deployment tools.

The DocAve Software Platform delivers these tools. With 15 independently deployable modules piloted via a unified, browser-based interface, DocAve is the key to transforming SharePoint from a powerful collaboration platform and digital asset repository into a truly comprehensive ECM system. Collectively, SharePoint and DocAve form the basis for the next generation of robust and cost effective ECM solutions, providing organizations a much needed alternative to today's costly legacy ECM systems.

This document will explain what makes the SharePoint+DocAve combination the world's most solid, reliable, and flexible ECM system, and provides guidelines for planning and building a successful SharePoint/DocAve ECM solution for your organization.

How Has ECM Evolved?

The way organizations conduct business has evolved since the first ECM systems began appearing on the market twenty-plus years ago. The tools and technologies we rely upon to meet our business objectives have become more powerful and integrated, revolutionizing the way we communicate and collaborate. The types of content we rely upon have grown to include documents, forms, images, audio/video, email messages, instant messages, web content, and more. And the regulatory atmosphere within which we do business has evolved, bringing with it new demands with regard to digital information privacy, security, and stewardship.

What does this mean for ECM? In short, it means that any successful ECM system must connect an organization's workers, business processes, and information in ways unimaginable when legacy ECM systems were first conceived. It must be wholly integrated into the business applications that knowledge workers rely upon to get their work done, while efficiently handling all the various types of content and delivery channels the enterprise engages. It must be flexible and extensible, so it can grow and evolve with the enterprise. It must be easily managed, providing tools to meet compliance obligations and organizational management protocols. And it must be intuitive, user-friendly, and easily adoptable, so it enhances productivity and aligns with the day-to-day business processes of both the knowledge worker and the enterprise.

When the first generation of ECM systems came to market in the late 1980's (let's call them ECM 1.0), their primary function was that of a uniform repository for enterprise information. Leveraging document and records management technologies, these ECM systems served primarily to organize enterprise data for compliance purposes. This is still a critical role of any ECM system. But as the quantity and types of unstructured data being handled by organizations grew, and online collaboration among knowledge workers became much more critical to business processes, successful ECM systems began to be understood increasingly as *integrative middleware*.

In this role, ECM would serve as an underlying infrastructure upon which formerly vertical applications and disparate groups of knowledge workers could seamlessly exchange information and collaborate in a web-based information infrastructure. No longer could an effective ECM system be merely a repository to handle the compliance-related organization; it had to be a flexible and integrated platform that enabled Enterprise Application Integration (EAI) and end-user collaboration. It had to be an **eco-system** in which applications, content, and users could work together. It had to be ECM 2.0.

Objectives of ECM 2.0
▪ *Establish control over abundant and growing volume of records and documents, to mitigate task duplication and minimize time spent searching for information*
▪ *Automate business processes to replace manual paper processing, increase*

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> *productivity, and enable online collaboration*
>
> - *Streamline the authoring and publishing of information to knowledge workers, customers, and partners via the intranet, extranet, and internet*
>
> - *Flexibly meet ever-evolving regulatory compliance obligations, including document retention policies, unstructured information management, and records management*

The Drivers of ECM 2.0

Though the core capabilities of an ECM system (to capture, store, preserve, manage, and deliver enterprise content) have not changed, four attributes have emerged as absolutely critical to a successful ECM 2.0 system.

▶ **Integration**

ECM 2.0 is not an application, but a platform capable of managing, organizing, and delivering data from the business productivity applications and multiple data stores the organization uses. According to a study conducted by Forrester Research in June 2009, over 80% of enterprise customers use Microsoft Office for worker productivity and collaboration.[1] This dictates that for the great majority of enterprises, a truly successful ECM system must integrate seamlessly with Microsoft Products and Technologies. Whichever technology is driving the ECM system, it must enable and empower collaboration among knowledge workers.

▶ **Scalability**

ECM 2.0 is able to grow with an organization. It leverages a storage and archiving system that can handle voluminous data without degrading system reliability, integrity, performance, or end-user experience. ECM 2.0 systems are architected in a fully-distributed manner that allows them to be efficiently, securely, and cost-effectively deployed to new working groups, wherever they are located.

▶ **Flexibility/Extensibility**

The typical modern enterprise is composed of numerous business units, often each with its own procedures, processes, and demands. They also collaborate and share information with a constellation of business partners, vendors, and customers. An ECM 2.0 system empowers the organization to deliver content and manage processes in the precise way each business unit and external party prefers and requires. ECM 2.0 provides intuitive tools to customize elements of the platform to suit the exact needs of its users. These tools empower knowledge workers to author, manage, and publish their content without the assistance of technical staff. Through published API's, common design protocols and open

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[1] *Forrester: Microsoft Office in No Danger from Competitors*
(http://www.pcworld.com/businesscenter/article/166123/forrester_microsoft_office_in_no_danger_from_competitors.html?tk=nl_dnx_h_crawl)

standards (such as XML and SMTP), ECM 2.0 systems encourage enterprises to craft the solutions they need to succeed.

▶ **Usability/Adoptability**

ECM 2.0 is intuitive, easy to use, and delivers the same "look and feel" as the business applications end-users work with everyday. (Once again, because the *vast* majority of organizations leverage Microsoft technologies, an ECM system with similar usability and "look and feel" provides distinct advantages.) With such integration – even though it is the underlying architecture and "connective tissue" of the organization's IT infrastructure – the ECM system itself is virtually transparent from the end-user perspective, and hence highly adoptable. For the administrator, ECM 2.0 systems are easily managed, monitored, and reported upon.

Why Haven't the legacy ECM systems evolved into ECM 2.0?

Legacy ECM vendors such as EMC (the maker of Documentum) and IBM (maker of FileNet) have failed to keep up with the needs of the modern enterprise for three key reasons: First and foremost, they are not platforms, but rather applications created for the sole purpose of organizing and preserving enterprise content for management and compliance purposes. They are well polished (and very expensive) digital asset repositories, but offer little beyond that. Second, they were not designed with collaboration and user-adoptability in mind, and have been playing a game of 'catch-up' as online collaboration has become increasingly important in the enterprise. But you can't transform an application designed for document management into a collaboration platform by simply adding a few connectors. For seamless collaboration, you need an underlying platform architecture upon which client-level applications can communicate and share data, with tools that users are familiar with and will gladly adopt.

And finally, legacy systems like Documentum and FileNet were not designed for customer-driven customization and extensibility, and hence do not offer the intuitive design and programming tools that let administrators shape components of the system to meet their needs.

These are the core reasons why legacy ECM has failed to help the modern enterprise meet both its productivity and compliance goals.

ECM
2.0

Capture
Manage
Store
Preserve
Deliver

SharePoint /DocAve - The Premier ECM 2.0 System

Much to the dismay of legacy ECM vendors, Microsoft SharePoint Products and Technologies are increasingly being identified by industry analysts and technology experts as the platform upon which the next generation of ECM systems will be built. Microsoft Office SharePoint Server 2007, fortified by the infrastructure management capabilities of the DocAve Software Platform, delivers the most powerful ECM solution available. Why? Because SharePoint and DocAve together provide:

► A unified platform capable of managing the entire life-cycle of enterprise content (including documents, records, forms, images, email messages, instant messages, and structured line-of-business data), from creation through to disposition. Legacy content that does not reside in SharePoint storage can be migrated with full fidelity, or exposed and delivered via the SharePoint interface for a unified end-user experience.

► An intuitive, user-friendly interface that fully integrates with the Microsoft applications knowledge workers rely upon, including the Microsoft Office client software bundle. This allows knowledge workers to quickly and painlessly adopt ECM processes (such as web authoring and publishing) into their daily work routines without having to change how they work, thereby freeing IT staff up to centrally manage the platform and not be consumed with the "brunt-work" of performing its functional processes.

► An integrated platform in which the key processes of ECM 2.0 (document management/collaboration, records management, web content management, enterprise search, and workflow) can be flexibly crafted using open standards and intuitive, virtually universally-recognizable Microsoft tools.

► A cohesive, easily scalable architecture with a common pool of services for use across the enterprise, (including web parts, integrated F.A.S.T. enterprise search, user management, and collaboration tools that connect users, client applications, and line-of-business applications together)

► A single storage architecture to house ECM content of all types and sizes, with powerful data protection, high availability, and archiving solutions to ensure content integrity and platform reliability, as well as connectors that pull legacy datasets into the SharePoint presentation layer and extenders to transfer SharePoint-derived content to appropriately tiered storage.

► A management framework that protects and optimizes the ECM platform without overburdening IT resources or exposing the enterprise to unnecessary risk. SharePoint and DocAve combine to ensure all ECM data

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and the platform is fully protected and easily recoverable; the entire ECM system and its users are centrally managed; all data retention is enforced via automated archiving; and all reporting, eDiscovery, and compliance initiatives are met with precision and speed.
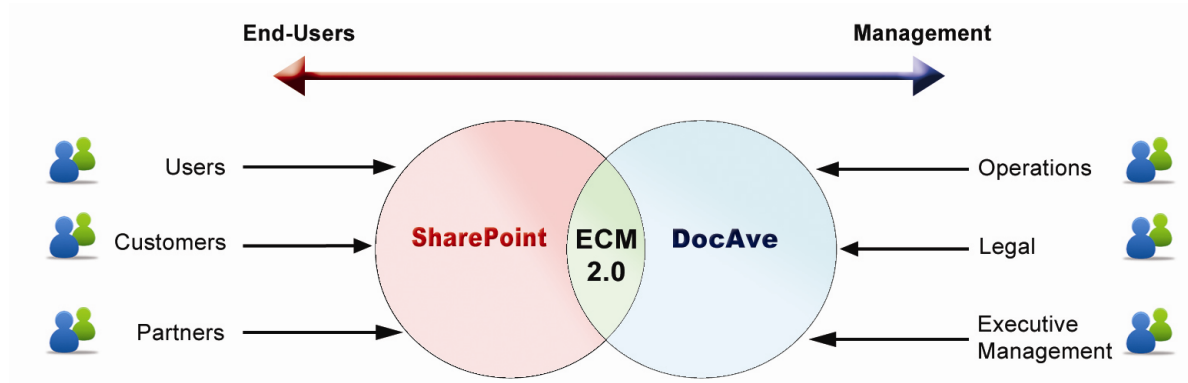
Guidelines for Deploying SharePoint as your ECM System

Leveraging SharePoint as your ECM solution demands proper planning. Let's now review the general guidelines for deploying SharePoint as your ECM 2.0 system by going step-by-step through each of the core competencies of ECM, and discussing how to leverage SharePoint and DocAve (and other best-of-breed third-party tools) to meet your objectives.

▶ **Management**

The distributed and flexible architecture of the SharePoint ECM System allows organizations to design an ECM topology aligned with their processes and unit structure, and easily scale the system with automated deployment management, unified user and settings management, real-time content replication, and system-wide reporting and testing.

Management
Objectives
▪ Manage the organization of unstructured enterprise content via an ECM system architecture that is congruent with enterprise operations and business units
▪ Administration of systematic metadata tagging to facilitate search and navigation of enterprise content
▪ Efficient document versioning and check-in/check-out management for information consistency
▪ Efficient administration of end-users, to ensure each has access/modification

rights for only those SharePoint elements for which they are authorized
- Management of collaboration and workflow tools, for controlled simultaneous information processing; this includes management of information from integrated business applications

Best Practice Guidelines

- Leverage SharePoint's site-based architecture to design an ECM system that is aligned with organizational structure and can evolve/scale as the organization does. Nimbly move and transfer this content on demand or according to customizable schedules with point-and-click ease **(DocAve Content Manager)**
- Utilize fully customizable metadata tagging to organize enterprise content
- Use SharePoint's fully-integrated, enterprise-wide Search to identify and locate content based on metadata tag and/or keyword. Meet reporting and eDiscovery obligations to identify, quarantine, and/or hold content for review (**DocAve Vault** and **DocAve eDiscovery**)
- Facilitate synchronous information access and end-user collaboration with SharePoint versioning, check-in/out, and workflow functionality. Ensure access to fully synchronized datasets regardless of end-user location **(DocAve Replicator)**
- Move and replicate enterprise content throughout the ECM system in real-time **(DocAve Content Manager)**
- Scale ECM deployment efficiently with automated propagation of farm server customizations, Solutions, and SP Designer elements **(DocAve Deployment Manager)**
- Discover and manage all ECM system users centrally from a single pane of glass **(DocAve SharePoint Administrator)**
- Monitor ECM system performance and activity from a single dashboard to prevent performance bottle-necks, non-compliance events, and to assist in future scaling planning **(DocAve Report Center)**

► **Capture**

The SharePoint/DocAve ECM System enables the upload of any digitized information asset. Leveraging a solution from the SharePoint ISV eco-system, the imaging, automated indexing, and OCR-enabled metadata tagging can be fully-integrated into the SharePoint/DocAve System. This enables truly seamless capture for enterprises requiring high-volume digitization of paper assets.

Capture

Objectives

- Digitize paper media and upload it to the ECM system efficiently
- Associate metadata to this digitized media, for indexing and enterprise-search
- Migrate legacy data stores into SharePoint with full fidelity (maintaining all associated metadata) to consolidate enterprise content and reduce legacy licensing costs
- Present legacy data that has not been migrated via SharePoint as if it had been

Best Practice Guidelines
▪ Upload any type of digitized media/asset into SharePoint from any internet-accessible workstation. Deliver and present data from legacy stores directly through SharePoint, providing a single point of access for end-users to interact with enterprise content **(DocAve Connector)**
▪ Utilize SharePoint's customizable metadata fields to enable indexing and enterprise-search of all uploaded content
▪ Migrate legacy data stores (including Files Shares, Exchange Public Folders, Lotus Notes, Documentum eRoom, and Open Text LiveLink) into SharePoint, granularly or in-bulk, according to business demands and schedules. Even empower end-users to migrate on-demand from File Shares **(DocAve Migrator)**
▪ Implement an imaging solution with dedicated SharePoint connectors (provided by all major imaging vendors, including *eCopy* and *Kodak*) to enable scan & upload of paper-sourced content to your SharePoint ECM
▪ Implement a capture solution fully-integrated into the SharePoint user interface. SharePoint ISV's *Atalasoft* and *KnowledgeLake* enable direct upload to SharePoint from the imaging device, as well as intelligent OCR recognition with automated metadata-field population functionality

▶ **Storage, Access, and Preservation**

Preservation and storage of content within SharePoint/DocAve ECM Systems is unified, fully protected against accidental deletion or corruption, and easily adaptable to specific business requirements and compliance obligations. All enterprise content is protected in a manner that conserves storage resources (via granular backup strategies) while enabling fast, full fidelity restoration. The ECM platform itself is fully protected (including all system configurations, customizations, and workflows) via customizable, synchronous system backups.   This allows for absolutely minimal downtime and manual restoration efforts should the platform fail. To ensure zero productivity loss, a fully synchronized stand-by ECM environment can be readied to assume ECM production tasks should the production system fail.   All data and platform protection processes are fully customizable, and piloted via an integrated, centralized interface.

SharePoint/DocAve ECM Systems deliver unmatched archiving and storage optimization capabilities. Administrators can easily apply business rules to govern the auto-archiving/retention of any and all ECM content for systematic off-load to tiered storage; while all archived assets remain accessible via the SharePoint interface. This strategy ensures optimal ECM system performance, mitigates database licensing costs, and ensures zero disruption to business processes. With SharePoint/DocAve ECM Systems, automated, fully-customizable, rule-based and on-demand compliance archiving, auditing, eDiscovery, and reporting provides the technical controls to meet all compliance obligations with precision, speed and clarity.

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Storage, Access, and Preservation

Objectives

- Maintain digital assets in accordance with business needs and compliance requirements
- Ensure swift restoration of ECM content items following corruption or accidental deletion
- Maintain all object metadata during and after recovery events
- Ensure seamless transition to a warm, stand-by SharePoint/DocAve ECM system should production system fail
- Maximize platform up-time and swift restoration of platform following disaster event
- Efficiently archive content in a manner that ensures satisfaction of all internal and external compliance objectives and optimizes ECM system performance
- Deliver real-time access to up-to-date ECM data to geographically-dispersed knowledge workers, regardless of location
- Ensure unified accessibility rights management of all end-users, regardless of geographic location
- Respond to regulatory and legal requests for information (both content and activity audits) in a timely and precise manner without excessively burdening IT staff

Best Practice Guidelines

- Ensure fast and full fidelity recovery of any lost or corrupted ECM documents, objects, sites, and site collections directly to production environment, or to any other SharePoint location, with no need for staging **(DocAve Backup and Recovery** and **DocAve SiteBin)**
- Leverage granular, intelligent backup capabilities to optimize your backup strategies. Prescribe variable backup routines/frequencies to content sets in order to optimize storage system while aggressively protecting critical ECM data **(DocAve Backup and Recovery)**
- Establish a warm, stand-by ECM system environment for one-switch disaster recovery **(DocAve High Availability)**
- Perform enterprise-wide archiving operations with a unified business-rule engine to optimize storage **(DocAve Archiver)**
- Off-load to tiered storage all discrete enterprise content exceeding a custom-set rule leveraging full support of Microsoft's EBS-API. **(DocAve Extender)**
- Replicate all ECM content, configurations, and securities to all regional SharePoint farms in real-time, with customizable throttle-controls, compression, and two-way synchronization **(DocAve Replicator)**
- Propagate all server configurations, customizations, SharePoint Solutions, and SharePoint Designer elements automatically between testing and production environments, and between central and regional farms **(DocAve Deployment Manager)**
- Centrally manage all user permissions, settings, and configurations, granularly or in bulk, across your entire multi-farm environment **(DocAve SharePoint Administrator)**

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- Conduct unified, automated eDiscovery across all active and archived enterprise content, via search and identification using keyword search, user, group, object, or metadata field. Output eDiscovery reports and records in all industry-accepted formats for 3rd-party review **(DocAve eDiscovery)**
- Satisfy all regulatory compliance obligations with full auditing of all ECM system and user activities, immutable content capture, and comprehensive, customizable report generation **(DocAve Auditor and DocAve Vault)**

▶ **Delivery**

Enterprise Content Management is meaningless if you cannot deliver the content to the people who need it, when they need it. Key to this is to leverage an ECM system that can expose enterprise content from various data stores. SharePoint/DocAve ECM systems serve as a unified presentation platform for all legacy enterprise content, whether they reside in file shares or legacy databases. Regardless of source, SharePoint ECM systems will index and subject to search all enterprise content.

Not only is a SharePoint/DocAve ECM system a unified presentation layer, it is also – as we've discussed – a unified delivery tool. Fully integrated with client Microsoft Office productivity tools, business units can propagate content to intranet, extranet and internet properties efficiently and according to internal protocols with ease.

Importantly, all enterprise content, audit records, and activity reports responsive to management, compliance, and eDiscovery demands are delivered efficiently and without excessively burdening staff resources. Fully customizable reports and content sets are easily generated and delivered in the format required by internal and external parties. As the enterprise grows, deploying the SharePoint/DocAve ECM system to remote locations and new users is well-governed and efficient, with new farms established quickly via automated propagation of server configurations and settings, and real-time, bi-directional synchronization of content, user settings, and securities.

Delivery
Objectives
- Unified and appropriately governed delivery of enterprise-wide content, regardless of source and type   - Timely delivery of comprehensive reporting for management and compliance purposes   - Efficient release of ECM system services to new members and units of organization
Best Practice Guidelines
Utilize SharePoint's optional full-integration with Active Directory Domain Services to unify enterprise and ECM user management. Manage securities and permissions of all SharePoint end-users via a unified interface to conserve valuable IT resources and time **(DocAve SharePoint Administrator)**

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- Leverage SharePoint's web-based interface to provide secure access to ECM system from any computer with internet connectivity
- Empower each business unit and working group to configure SharePoint Team Sites and portals to deliver content in the most effective and desired manner, by making use of SharePoint's hundreds of available web parts and workflows, and powerful customization tools (including *SharePoint Designer* and *Visual Studio*)
- Scale ECM system with relative ease due to its distributed architecture, cost-effective licensing model, and automated deployment management tools **(DocAve Deployment Manager)**
- Ensure seamless delivery of business application content to intranet, extranet, and internet properties as the only ECM system fully integrated with Microsoft Office. Because Microsoft tools are so intuitive and well-known, such processes are easily handled by knowledge workers and do not over burden IT staff resources. Ensure content delivery is strictly governed with granular security trimming that is centrally managed **(DocAve SharePoint Administrator)**
- Expose all networked file shares and legacy database content via SharePoint **(DocAve Connector)**
- Analyze and report upon all platform activity, content access/modification histories, and end-user activities for management analyses and compliance satisfaction **(DocAve Report Center; DocAve Auditor)**
- Synchronize SharePoint content among multiple farms to ensure delivery of most up-to-date content to all end-users **(DocAve Replicator)**
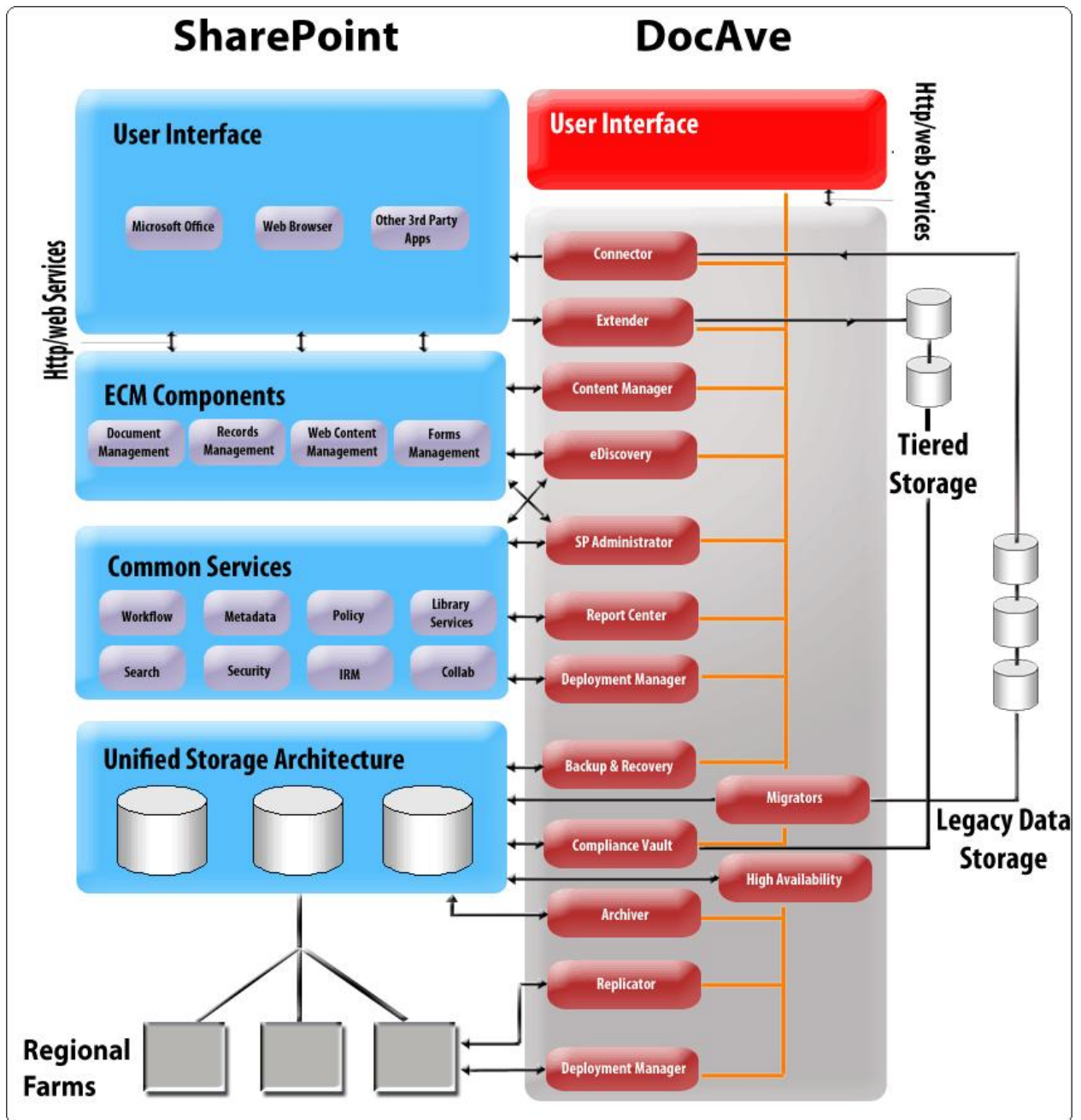
DocAve: A Single Platform with 15 Independently Deployable Modules to Unlock SharePoint's ECM Capabilities

With our ECM objectives outlined, and guidelines provided for deploying SharePoint and DocAve to meet these objectives, let's briefly outline the core capabilities of DocAve. Below is a short description of each DocAve module. Each are independently deployable, though piloted via a unified interface. When deployed together, they provide SharePoint with the functionality necessary to transform it into the world's most powerful ECM 2.0 system.

- **DocAve Backup and Recovery -** Business process-aware, granular, full-fidelity backup and restore along with full-spectrum farm-level platform protection. Automatically classify SharePoint content according to business-criticality as well as usage to determine backup frequency. Restore from DocAve, SQL Server, or TDP SQL backups with all metadata, securities, and version histories to ensure content can be accessed without productivity interruption.

- **DocAve High Availability -** Instantaneous disaster recovery tool, delivering one-click access to a stand-by SharePoint environment via a simple DNS "flip".

- **DocAve Site Bin –** A recycle bin to capture all deleted sites and site collections in real-time. Automatically backup on deletion to ensure swift recovery of accidentally deleted sites and collections.

- **DocAve SharePoint Administrator -** Centralized administration of your enterprise-wide SharePoint environment, from a single farm to hundreds of farms. Easily view, search, manage, and report on configuration, security and settings of SharePoint farms, site collections, sites, web applications and folders. Define, copy or transfer user permissions from a single console. Security trimming enables delegation of management tasks to site collection-level administrators.

- **DocAve Archiver -** Offload entire SharePoint site collections, sites, document libraries, and individual contents and versions to effectively manage server performance and storage costs. Seamless user experience via archive stubs. Flexibly define archive policy-based plans based on an organization's business needs – or empower end users to archive content directly via their SharePoint interface. Restore archived content directly through SharePoint or through the DocAve administrative interface, keeping intact all original metadata and security permissions.

- **DocAve Connector -** Expose legacy data stores in SharePoint, for unified presentation of enterprise content from file shares and third party databases

- **DocAve Extender -** Push content to tiered storage at the moment of upload to SharePoint, optimizing SQL storage resources while providing unfettered end-user access (leveraging stub-system) via SharePoint

- **DocAve Replicator -** Live, real-time (event-driven) and scheduled content replication across geographically distributed locations to enable effective collaboration. Replicator provides a simple yet powerful tool to replicate content, site collections, and sites from one location to another within a single SharePoint environment, or across

multiple SharePoint farms. Synchronize replicated content with two-way replication and limit bandwidth consumption across multiple environments with network traffic throttling and byte-level differencing.

- ⚔ **DocAve Content Manager -** Real-time transfer of SharePoint content from one location to another within or across multiple SharePoint farms while maintaining all metadata, permissions, and configurations. Change site topology, copy permissions, or move individual items throughout or across farms. Restructure content and topology of SharePoint environments easily and efficiently..

- ⚔ **DocAve Deployment Manager -** Efficient and flexible propagation of complex server configurations, site designs and templates, and custom solutions between environments, streamlining the notoriously complex SharePoint development, staging, and deployment process. Systematically clone system changes to ensure consistency across all pre-production and production systems.

- ⚔ **DocAve Report Center -** Discover, analyze, and report upon every aspect of deployment architecture, user activity, and platform performance for SharePoint. Gather and produce vital intelligence about how the platform is being used for proactive management and planning.

- ⚔ **DocAve Compliance Vault -** Ensure secure storage of all SharePoint records in immutable form with all metadata and securities intact, in order to satisfy stringent legal and regulatory requirements. Assists in enforcing and monitoring organizational policies with full auditing of all activities performed in SharePoint.

- ⚔ **DocAve Auditor -** Record and track all user actions (including search actions and content interactions) within to understand the breadth and behavior of your SharePoint deployment. Extend your native SharePoint audit data by performing geo-auditing across farms, and tracking item views and site deletions. Combine with the DocAve Report Center for advanced analytics on SharePoint usage.

- ⚔ **DocAve eDiscovery -** Comprehensively search and report upon all active and archived SharePoint content by any criteria, including keyword/phrase, metadata tag, or random sampling. Export contents with full fidelity for presentation to third parties or for legal analysis. Perform legal holds on content in real-time to ensure proactive compliance.

- ⚔ **DocAve Migrator -** Fully-mapped, full-fidelity migration of legacy data to SharePoint. Reliably transfer all legacy elements individually via incremental migration or collectively via mass migration. Supported Data Sources include: SharePoint 2001 and 2003;

Exchange Public Folders; File System/Network Shares; EMC Documentum eRoom; IBM Lotus Notes/QuickPlace; and Open Text LiveLink.

Two Platforms, One Integrated ECM Solution

Because of its singular capacity to connect an organization's people, streamline its processes, and manage and store its information, Microsoft SharePoint is positioned to be the platform upon which the ECM systems of the future are built. When deployed with the tools available within the DocAve Software Platform, SharePoint provides the reliability, flexibility, scalability, and security organizations require of their ECM systems.

To learn more about how SharePoint and DocAve technologies can be leveraged to build the ECM solution your organization needs, please visit http://www.avepoint.com/sharepoint-solutions/sharepoint-content-management/

To speak with one of AvePoint's ECM specialists, please call 201.793.1111 or email sales@avepoint.com

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Management	• Leverage SharePoint's site-based architecture to design an ECM system that is aligned with organizational structure and can evolve/scale as the organization does. Nimbly move and transfer this content on-demand or according to customizable schedules with point-and-click ease (DocAve Content Manager)
	• Utilize fully customizable metadata tagging to organize enterprise content
	• Use SharePoint's fully-integrated, enterprise-wide Search to identify and locate content based on metadata tag and/or keyword. Meet reporting and eDiscovery obligations to identify, quarantine, and/or hold content for review (DocAve Vault and DocAve eDiscovery)
	• Facilitate synchronous information access and end-user collaboration with SharePoint versioning, check-in/out, and workflow functionality. Ensure access to fully synchronized datasets regardless of end-user location (DocAve Replicator)
	• Move and replicate enterprise content throughout the ECM system, on demand or according to customizable schedules (DocAve Content Manager)
	• Scale ECM deployment efficiently with automated propagation of farm server customizations, Solutions, and SP Designer elements (DocAve Deployment Manager)
	• Discover and manage all ECM system users centrally from a single pane of glass (DocAve SharePoint Administrator)
	• Monitor ECM system performance and activity from a single dashboard to prevent performance bottle-necks, non-compliance events, and to assist in future scaling planning (DocAve Report Center)
Capture	• Upload any type of digitized media/asset into SharePoint from any internet-accessible workstation. Deliver and present data from legacy stores directly through SharePoint, providing a single point of access for end-users to interact with enterprise content (DocAve Connector)
	• Utilize SharePoint's customizable metadata fields to enable indexing and enterprise-search of all uploaded content
	• Migrate legacy data stores (including Files Shares, Exchange Public Folders, Lotus Notes, Documentum eRoom, and Open Text LiveLink) into SharePoint, granularly or in-bulk, according to business demands and schedules. Even empower end-users to migrate on-demand from File Shares (DocAve Migrator)
	• Implement an imaging solution with dedicated SharePoint connectors (provided by all major imaging vendors, including *eCopy* and *Kodak*) to enable scan & upload of paper-sourced content to your SharePoint ECM
	• Implement an image capture solution fully-integrated into the SharePoint user interface. SharePoint ISV's *Atalasoft* and *KnowledgeLake* enable direct upload to SharePoint from the imaging device, as well as intelligent OCR recognition with automated metadata-field population functionality
Storage,	• Ensure fast and full fidelity recovery of any lost or corrupted ECM documents, objects, sites, and site collections directly to production environment, or to any other SharePoint location, with no need for staging (DocAve Backup and Recovery and DocAve SiteBin)

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	▪ Leverage granular, intelligent backup capabilities to optimize your backup strategies. Prescribe variable backup routines/frequencies to content sets in order to optimize storage system while aggressively protecting critical ECM data (DocAve Backup and Recovery)
	▪ Establish a warm, stand-by ECM system environment for one-switch disaster recovery (DocAve High Availability)
	▪ Perform enterprise-wide archiving operations with a unified business-rule engine to optimize storage (DocAve Archiver)
	▪ Off-load to tiered storage all discrete enterprise content exceeding a custom-set rule leveraging full support of Microsoft's EBS-API. (DocAve Extender)
	▪ Replicate all ECM content, configurations, and securities to all regional SharePoint farms in real-time, with customizable throttle-controls, compression, and two-way synchronization (DocAve Replicator)
	▪ Propagate all server configurations, customizations, SharePoint Solutions, and SharePoint Designer elements automatically between testing and production environments, and between central and regional farms (DocAve Deployment Manager)
	▪ Centrally manage all user permissions, settings, and configurations, granularly or in bulk, across your entire multi-farm environment (DocAve SharePoint Administrator)
	▪ Conduct unified, automated eDiscovery across all active and archived enterprise content, via search and identification using keyword search, user, group, object, or metadata field. Output eDiscovery reports and records in all industry-accepted formats for 3rd-party review (DocAve eDiscovery)
	▪ Satisfy all regulatory compliance obligations with full auditing of all ECM system and user activities, immutable content capture, and comprehensive, customizable report generation (DocAve Auditor and DocAve Vault)
Delivery	▪ Utilize SharePoint's optional full-integration with Active Directory Domain Services to unify enterprise and ECM user management. Manage securities and permissions of all SharePoint end-users via a unified interface to conserve valuable IT resources and time (DocAve SharePoint Administrator)
	▪ Leverage SharePoint's web-based interface to provide secure access to ECM system from any computer with internet connectivity
	▪ Empower each business unit and working group to configure SharePoint Team Sites and portals to deliver content in the most effective and desired manner, by making use of SharePoint's hundreds of available web parts and workflows, and powerful customization tools (including *SharePoint Designer* and *Visual Studio*)
	▪ Scale ECM system with relative ease due to its distributed architecture, cost-effective licensing model, and automated deployment management tools (DocAve Deployment Manager)
	▪ Ensure seamless delivery of business application content to intranet, extranet, and internet properties as the only ECM system fully integrated with Microsoft Office. Because Microsoft tools are so intuitive and well-known, such processes are easily handled by knowledge workers and do not over burden IT staff resources. Ensure content delivery is strictly governed with granular security trimming that is centrally managed (DocAve SharePoint Administrator)
	▪ Expose all networked file shares and legacy database content via SharePoint (DocAve Connector)
	▪ Analyze and report upon all platform activity, content access/modification histories,

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	and end-user activities for management analyses and compliance satisfaction (DocAve Report Center and DocAve Auditor)
	▪ Synchronize SharePoint content among multiple farms to ensure delivery of most up-to-date content to all end-users (DocAve Replicator)

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