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Folksonomy vs Taxonomy

Social Document Management in IBM Connections

Femke Goedhart | Business Consultant

SILVER SIDE® *Uitgesproken anders!*

Business Consultant

- Social Business
- Document Management
- Collaboration

Silverside is an IBM Premier Business Partner in The Netherlands. Making a difference in building Social solutions & adoption of collaborative software

- Twitter: @FemkeGoedhart
- LinkedIn: http://nl.linkedin.com/in/femkegoedhart
- Blog: http://femkegoedhart.com
- Slideshare: http://www.slideshare.net/femware

Agenda

- Evolution of information management
- Social document management
- Document Management spectrum
- What's new with CCM?
- Strategies

SILVER SIDE® Uitgesproken anders!

Agenda

- **Evolution of information management**
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- Strategies

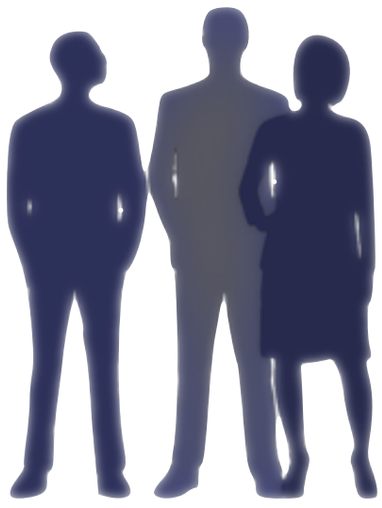
1960-1975
Sales DataBase
TimeKey
CustomerKey
ShipperKey
ProductKey
EmployeeKey
ItemFreight
ItemQuanity
ItemAll
Discount
Employee
EmployeeKey

1975-2001

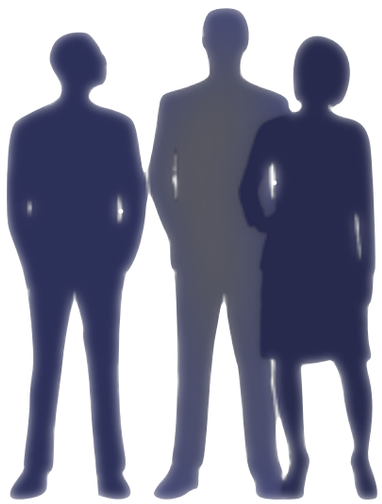
2001-2015

Data

Information

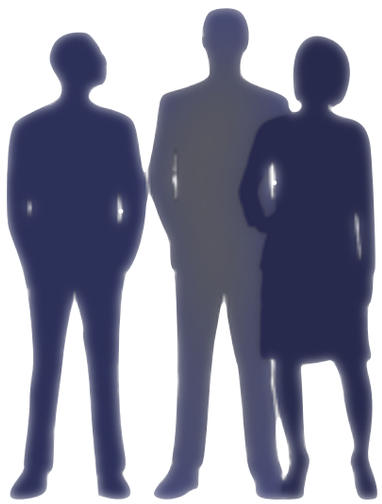


Knowledge



Company

End User



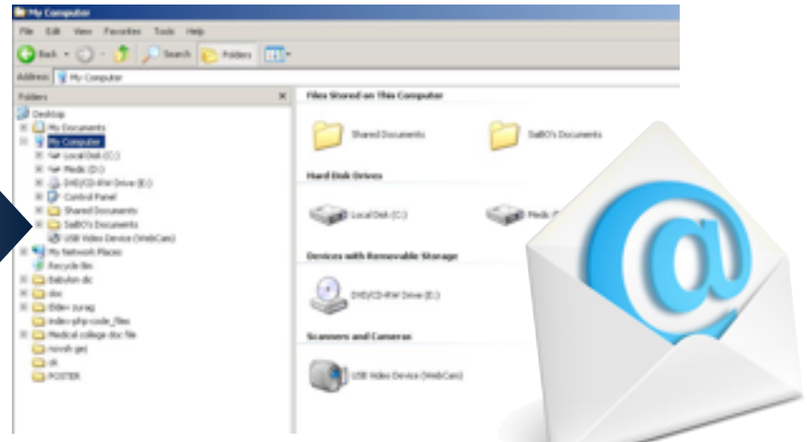
Top down

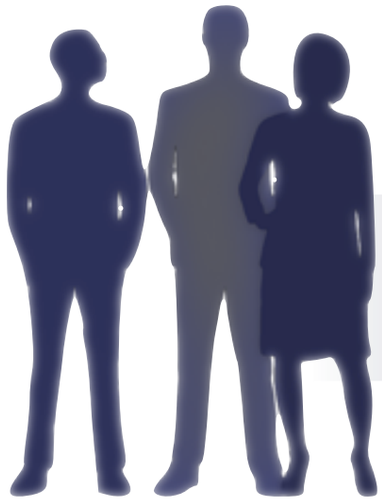
Bottom up

ERP

Name	Number	City	Country
John	+1 702 022 113	Boston	USA
Anna		Amsterdam	Netherlands
Sue-Ann		London	UK
Mitch		New York	USA

File Management





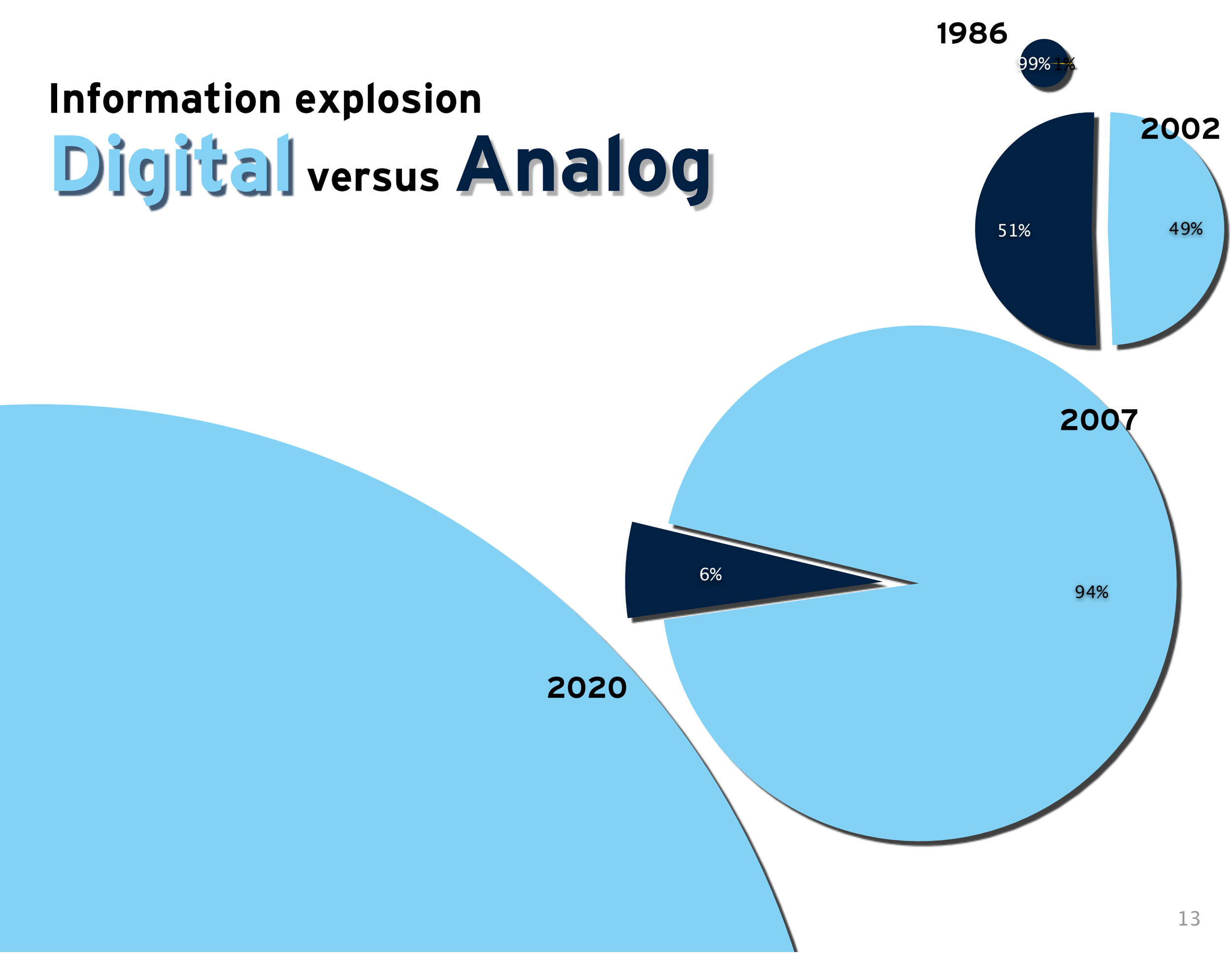
Collaboration

Systems of Record

Systems of Engagement

Information explosion

Digital versus Analog



Taxonomy

(Social) Document Management

Folksonomy

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Agenda

- Evolution of information management
- **Social document management**
- Document Management spectrum
- What's new with CCM?
- Strategies

Strategies, Methods & Tools

TO

ECM=

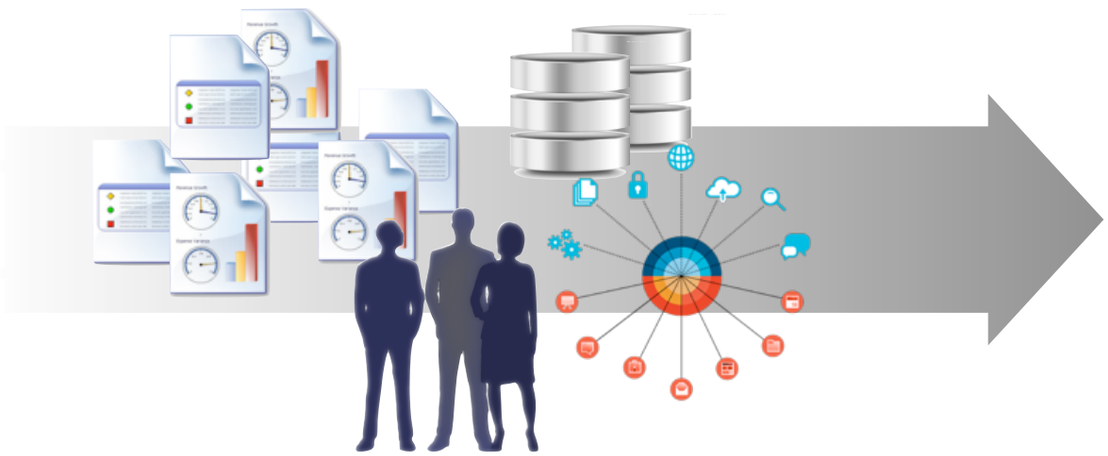
- CAPTURE
- MANAGE
- STORE
- PRESERVE
- DELIVER

Content

CAPTURE
MANAGE
STORE
PRESERVE
DELIVER

Document Management

CAPTURE
MANAGE
STORE
PRESERVE
DELIVER

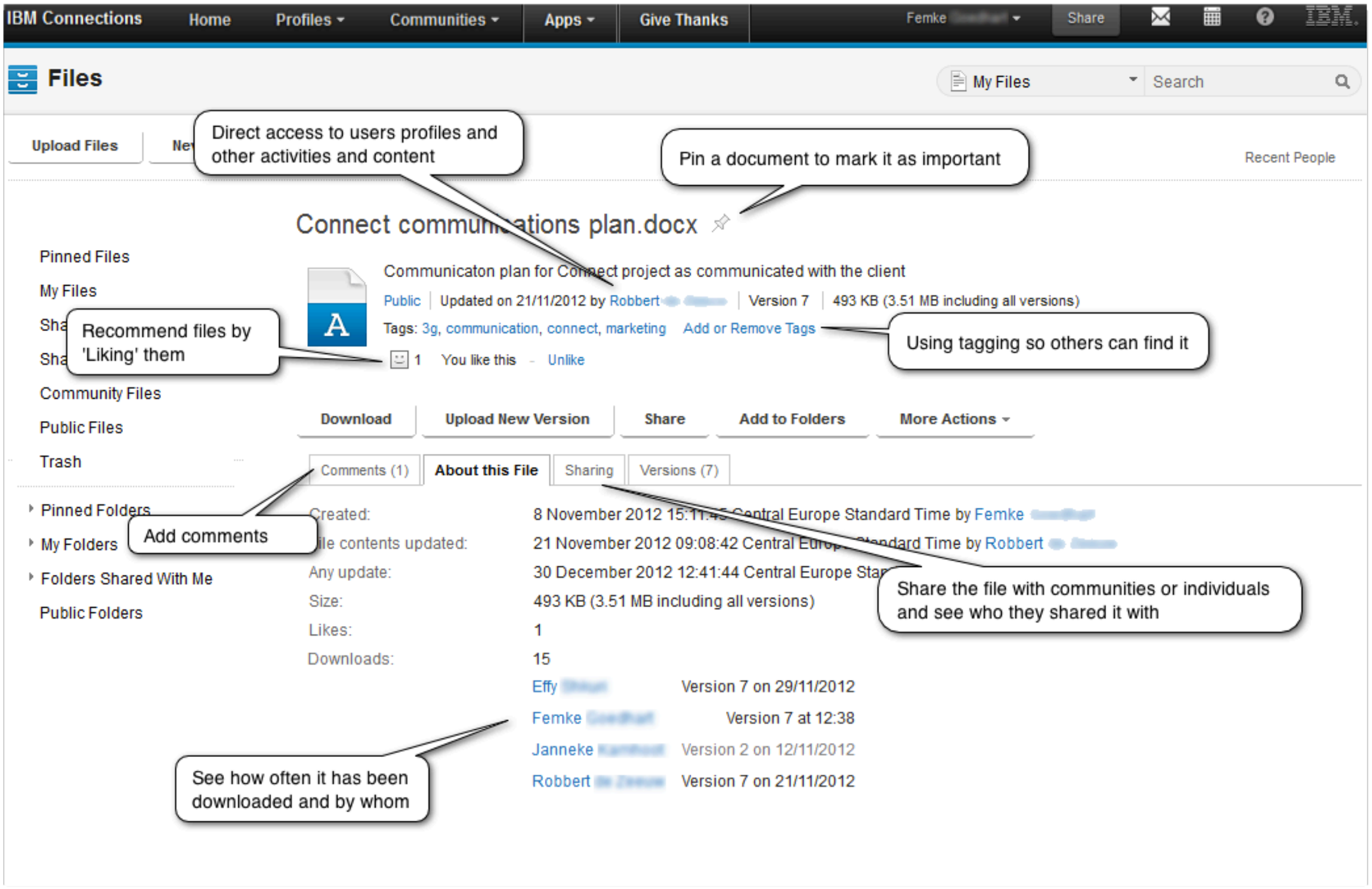


Content Management

Scalable? -> **Enterprise Content Management**

Social elements

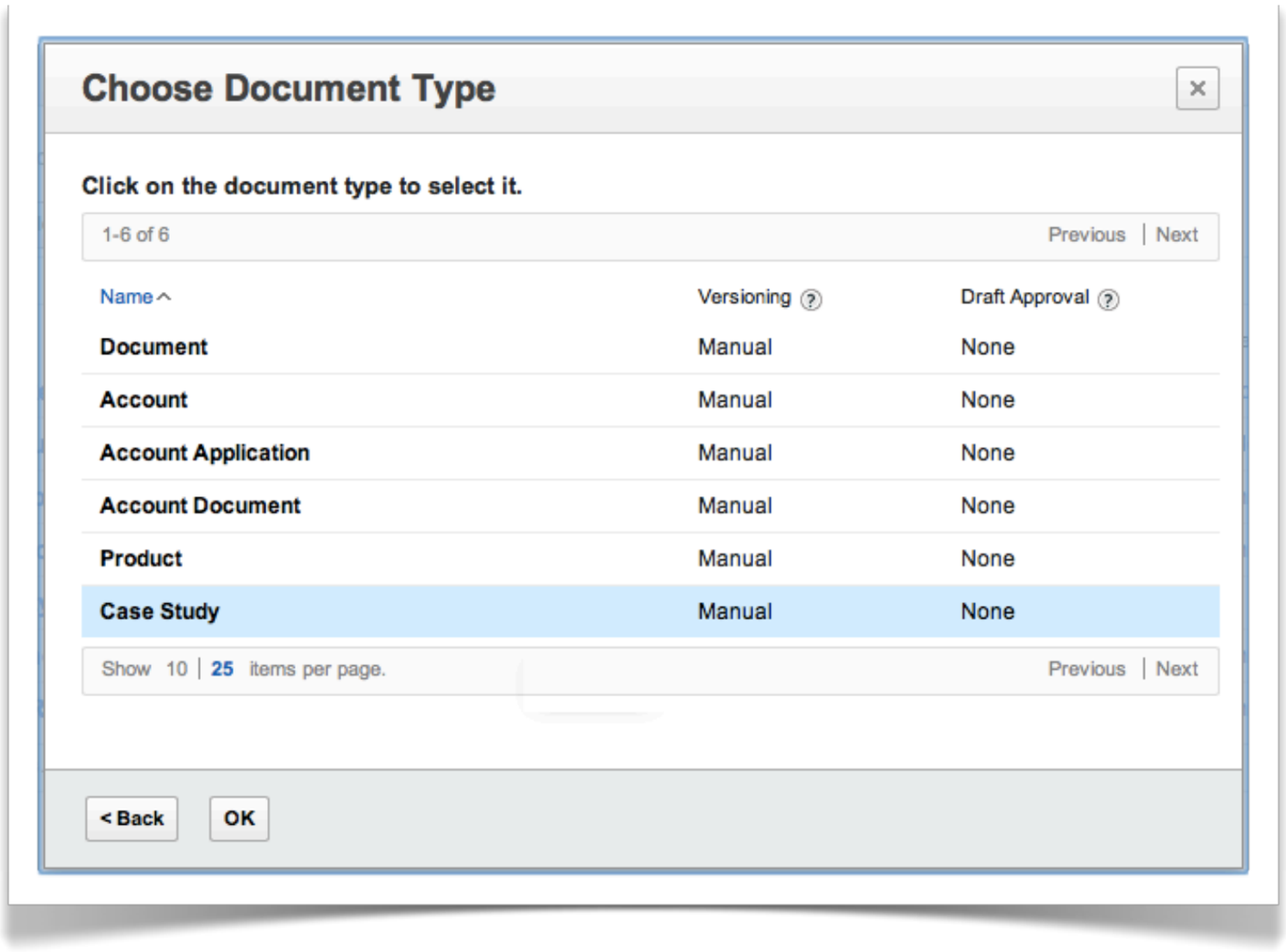
- Tagging
- Commenting
- Recommendations
- Interaction history
- Sharing
- Collaboration

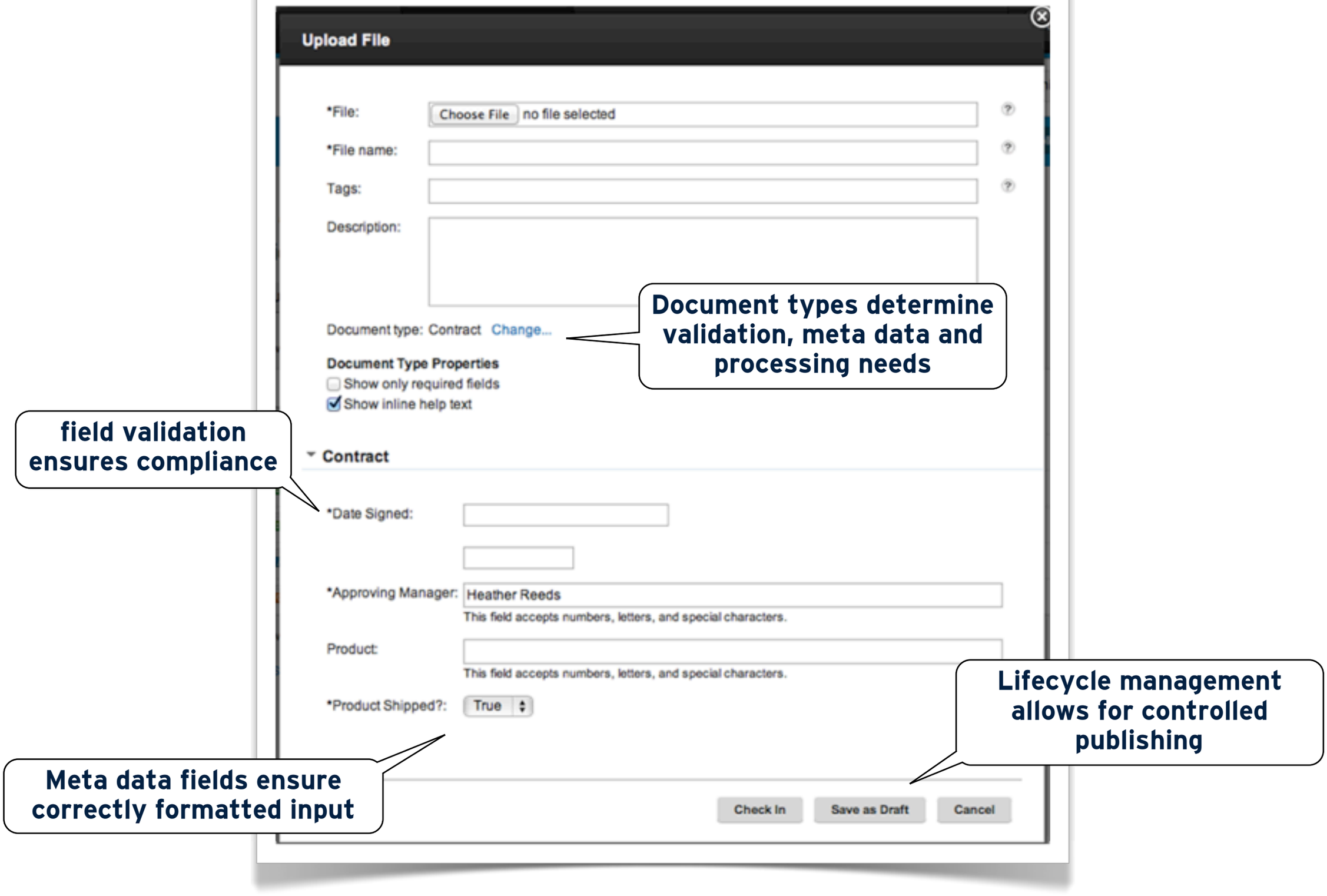

IBM Connections
Home
Profiles
Communities
Apps
Give Thanks
Femke
Share
Files
My Files
Search
Upload Files
Recent People
Direct access to users profiles and other activities and content
Pin a document to mark it as important
Connect communications plan.docx
Communicaton plan for Connect project as communicated with the client
Public | Updated on 21/11/2012 by Robbert | Version 7 | 493 KB (3.51 MB including all versions)
Tags: 3g, communication, connect, marketing Add or Remove Tags
1 You like this - Unlike
Recommend files by 'Liking' them
Using tagging so others can find it
Pinned Files
My Files
Community Files
Public Files
Trash
Pinned Folders
My Folders
Folders Shared With Me
Public Folders
Download
Upload New Version
Share
Add to Folders
More Actions
Comments (1)
About this File
Sharing
Versions (7)
Add comments
Created:
File contents updated:
Any update:
Size:
Likes:
Downloads:
8 November 2012 15:11:45 Central Europe Standard Time by Femke
21 November 2012 09:08:42 Central Europe Standard Time by Robbert
30 December 2012 12:41:44 Central Europe Standard Time
493 KB (3.51 MB including all versions)
1
15
Share the file with communities or individuals and see who they shared it with
Effy Version 7 on 29/11/2012
Femke Version 7 at 12:38
Janneke Version 2 on 12/11/2012
Robbert Version 7 on 21/11/2012
See how often it has been downloaded and by whom

Document Management elements

- Check-in/Check-out
- Versioning
- Workflow/BPM
- Security
- Search & navigation

Document types & Meta data



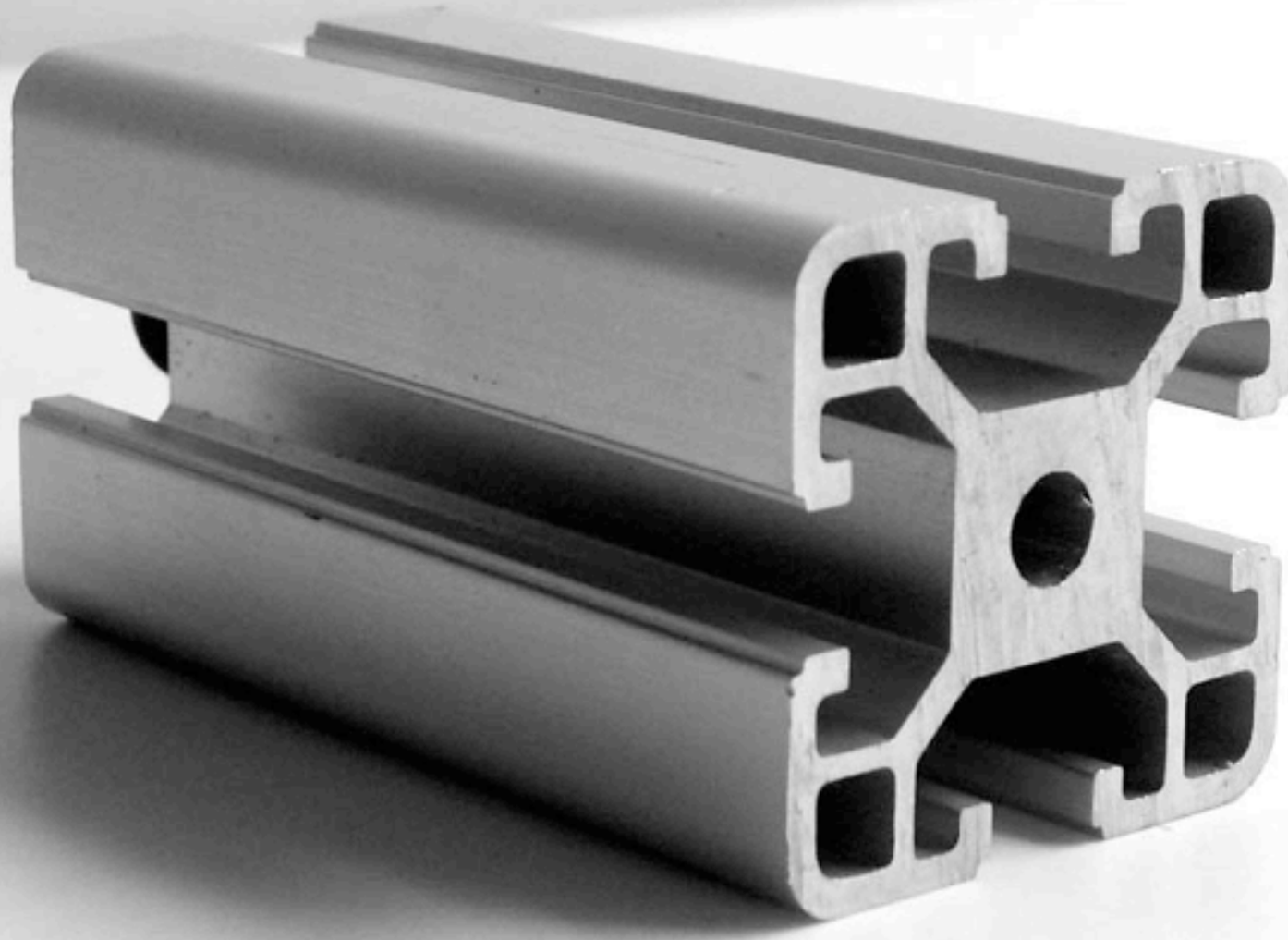

Upload File
*File:
Choose File
no file selected
*File name:
Tags:
Description:
Document type: Contract Change...
Document Type Properties
Show only required fields
Show inline help text
Contract
*Date Signed:
*Approving Manager:
Heather Reeds
This field accepts numbers, letters, and special characters.
Product:
This field accepts numbers, letters, and special characters.
*Product Shipped?:
True
Check In
Save as Draft
Cancel
Document types determine validation, meta data and processing needs
field validation ensures compliance
Meta data fields ensure correctly formatted input
Lifecycle management allows for controlled publishing

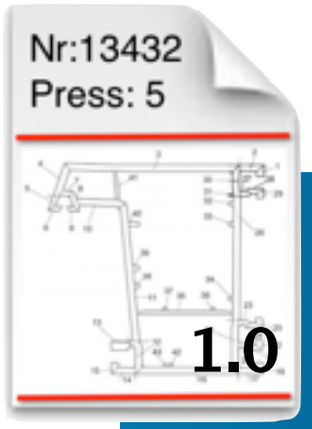
But also....

what? why?
For how long???

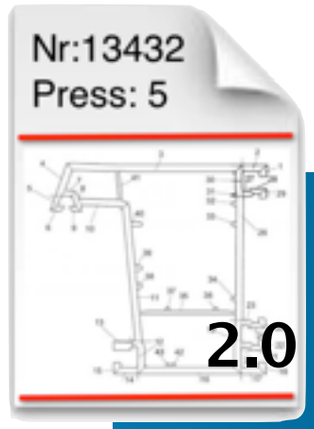
Compliance
Regulation
Legislation

An example...



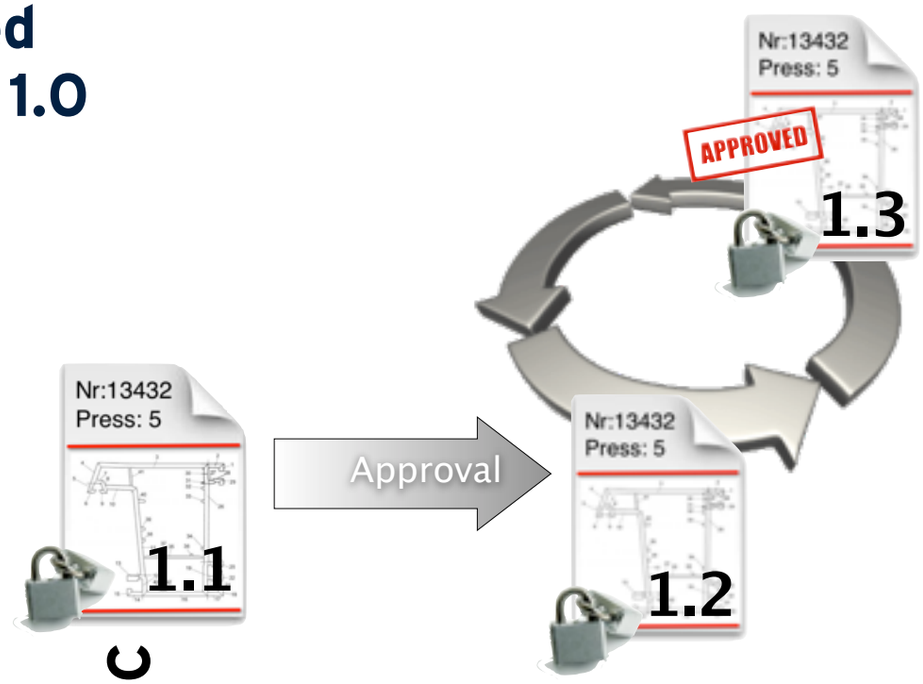


PRODUCTION



Released version 1.0

Released version 2.0



Customer RFC

Lifecycle Management

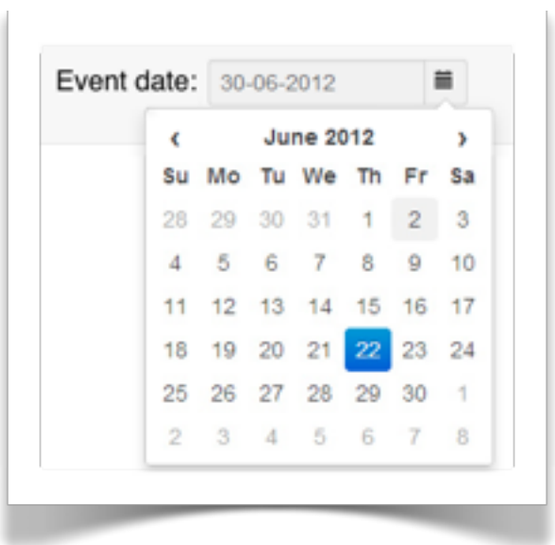
Version: 1, 2, 3, 4...

≠

Version: 1.0, 1.1, 1.2, 2.0...

≠

≠



01-02-2013

Jan 2nd or Feb 1st?

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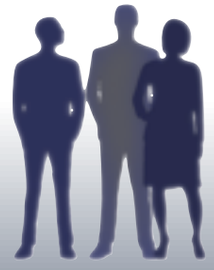
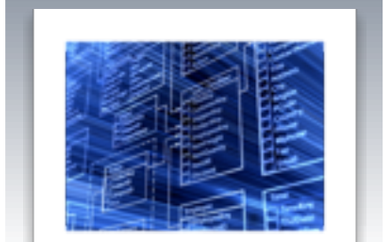
- **Document Management spectrum**
- What's new with CCM?
- Strategies

Company



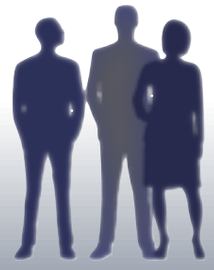
End User

Company



Long term

Instant



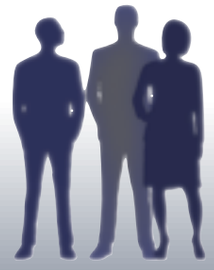
End User

Company

Long term

Instant

Document Collaboration



Document Sharing

End User

Company

Enterprise Content Management

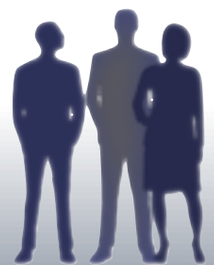
Document Point Solutions

Long term

Instant

Document Collaboration

Document Sharing



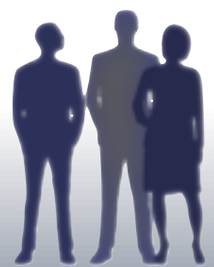
End User

Company

Enterprise Content Management (IBM FileNet, IBM Content Mgr, Docova)

Document Point Solutions (integrated business tools)

Document Collaboration (IBM Connections, Quickr)



Document Sharing (file system, Dropbox)

End User

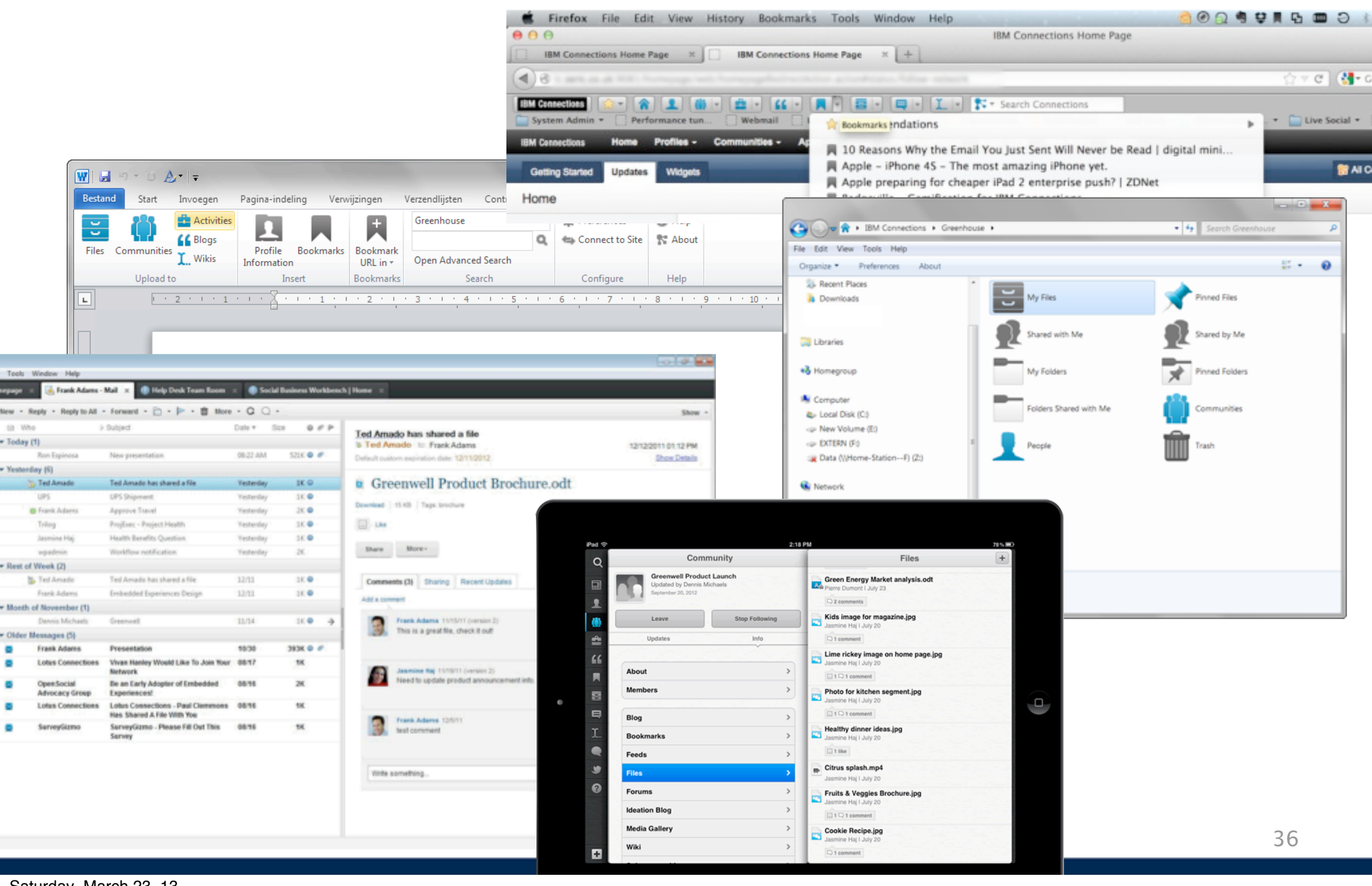
Enterprise Content Management

Document Point Solutions

Document Collaboration

Document Sharing

challengers
leaders
ability to execute
Microsoft
IBM
Oracle
Hyland Software
OpenText
Perceptive Software
EMC
Laserfiche
Xerox
Objective
Saperion
Fabasoft
Newgen Software Technologies
Systemware
Alfresco
Ever Team
SpringCM
M-Files
Software Innovation
SunGard
Unisys
Siav
niche players
visionaries
completeness of vision
As of October 2012


Firefox File Edit View History Bookmarks Tools Window Help
IBM Connections Home Page
IBM Connections
Search Connections
Home Profiles Communities
Getting Started Updates Widgets
Bookmarks
10 Reasons Why the Email You Just Sent Will Never be Read | digital mini...
Apple – iPhone 4S – The most amazing iPhone yet.
Apple preparing for cheaper iPad 2 enterprise push? | ZDNet
Bestand Start Invoegen Pagina-indeling Verwijzingen Verzendlijsten
Files Communities Activities Blogs Wikis Upload to
Profile Information Bookmarks Insert
Bookmark URL in Bookmarks
Greenhouse Open Advanced Search Search
Connect to Site Configure
About Help
IBM Connections Greenhouse
File Edit View Tools Help
Organize Preferences About
Recent Places Downloads Libraries Homegroup Computer Local Disk (C:) New Volume (E:) EXTERN (F:) Network
My Files Pinned Files Shared with Me Shared by Me My Folders Pinned Folders Folders Shared with Me Communities People Trash
Tools Window Help
Frank Adams - Mail Help Desk Team Room Social Business Workbench | Home
Ted Amado has shared a file
Greenwell Product Brochure.odt
Comments (3) Sharing Recent Updates
iPad 2:18 PM 78%
Community
Greenwell Product Launch
Updated by Dennis Michaels
September 20, 2012
Leave Stop Following
Updates Info
About Members Blog Bookmarks Feeds Files Forums Ideation Blog Media Gallery Wiki
Files
Green Energy Market analysis.odt
Kids image for magazine.jpg
Lime rickey image on home page.jpg
Photo for kitchen segment.jpg
Healthy dinner ideas.jpg
Citrus splash.mp4
Fruits & Veggies Brochure.jpg
Cookie Recipe.jpg

Dropbox
Dropbox

we may suspend immediately.

Dropbox is Available "AS-IS"

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TO THE FULLEST EXTENT PERMITTED BY LAW, IN NO EVENT WILL DROPBOX, ITS AFFILIATES, OFFICERS, EMPLOYEES, AGENTS, SUPPLIERS OR LICENSORS BE

Excerpt of Dropbox Terms of service as of Jan 2013

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Agenda

- Evolution of information management
- Social document management
- Document Management spectrum
- **What's new with CCM?**
- Strategies

Profiles
Find the people you need

Communities
Work with people who share common roles and expertise

Home page
See what's happening across your social network

Social Analytics
Discover who and what you don't know via recommendations

Micro-blogging
Reach out for help your social network

Bookmarks
Save, share, and discover bookmarks

Blogs
Present your own ideas, and learn from others

Files
Post and share, documents, presentations, images, and more

Document / Linked Libraries
Securely manage and collaborate on business documents

Wikis
Create web content together

Activities
Organize your work and tap your professional network

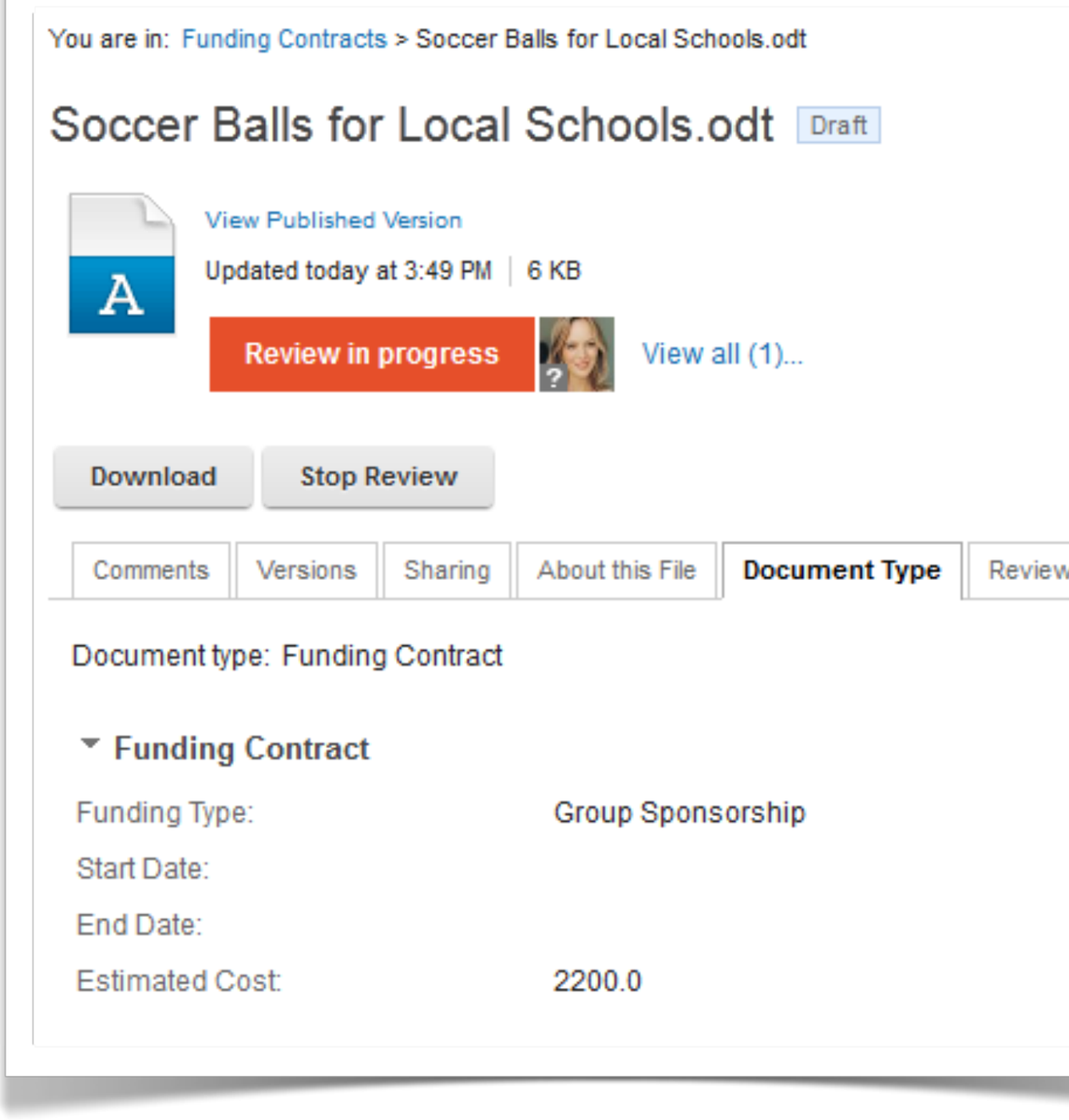
Forums
Exchange ideas with, and benefit from the expertise of others

Media Gallery
Add sizzle by sharing rich media like Photos and Videos

Ideation Blogs
Create ideas and leverage the crowd to develop them

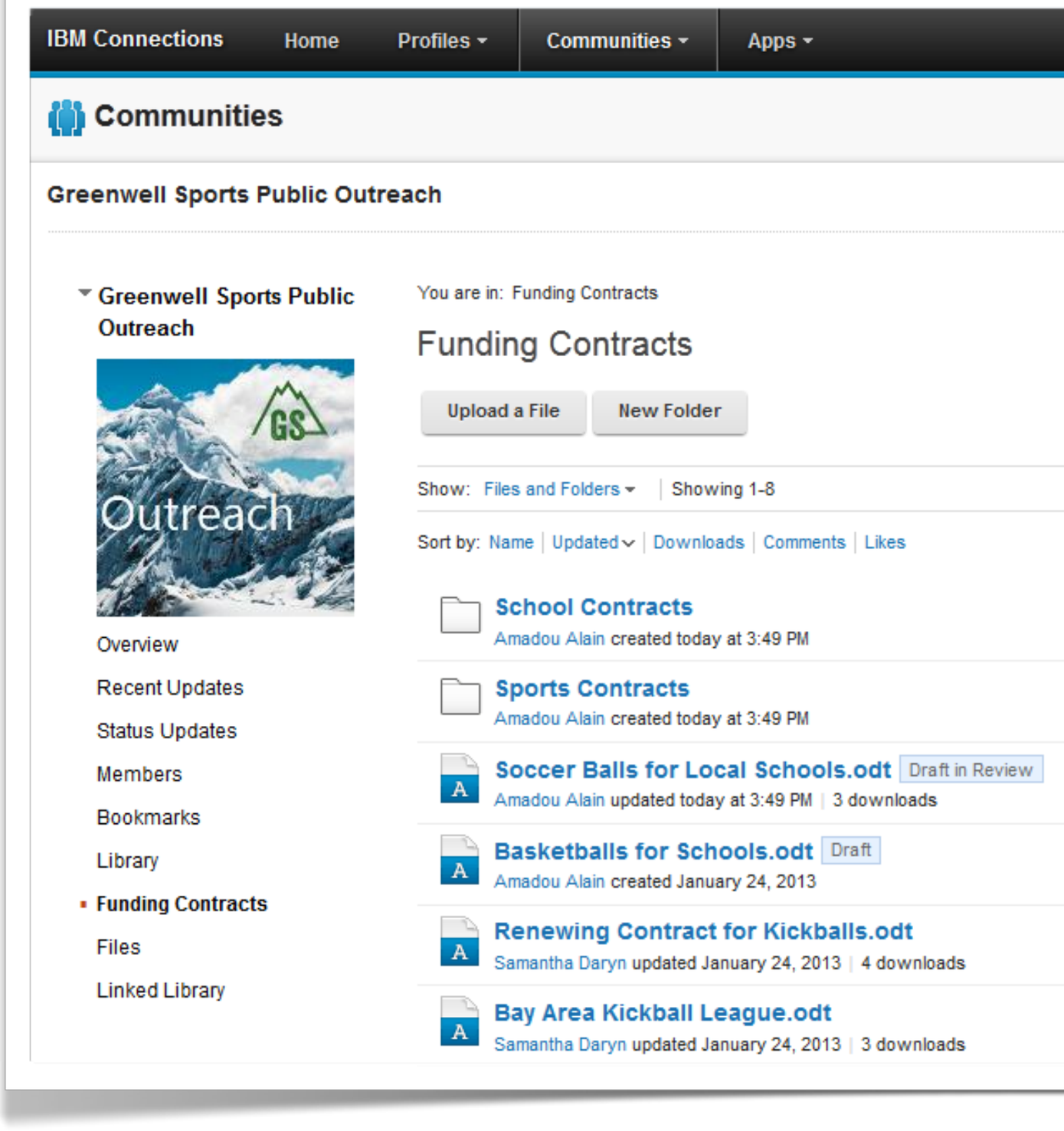
Document

- Meta data & Documents types
- Approval cycles
- Field validations
- ‘Breadcrumb trails’/taxonomy
- Soft deletion / trash can
- Lifecycle management & draft editing

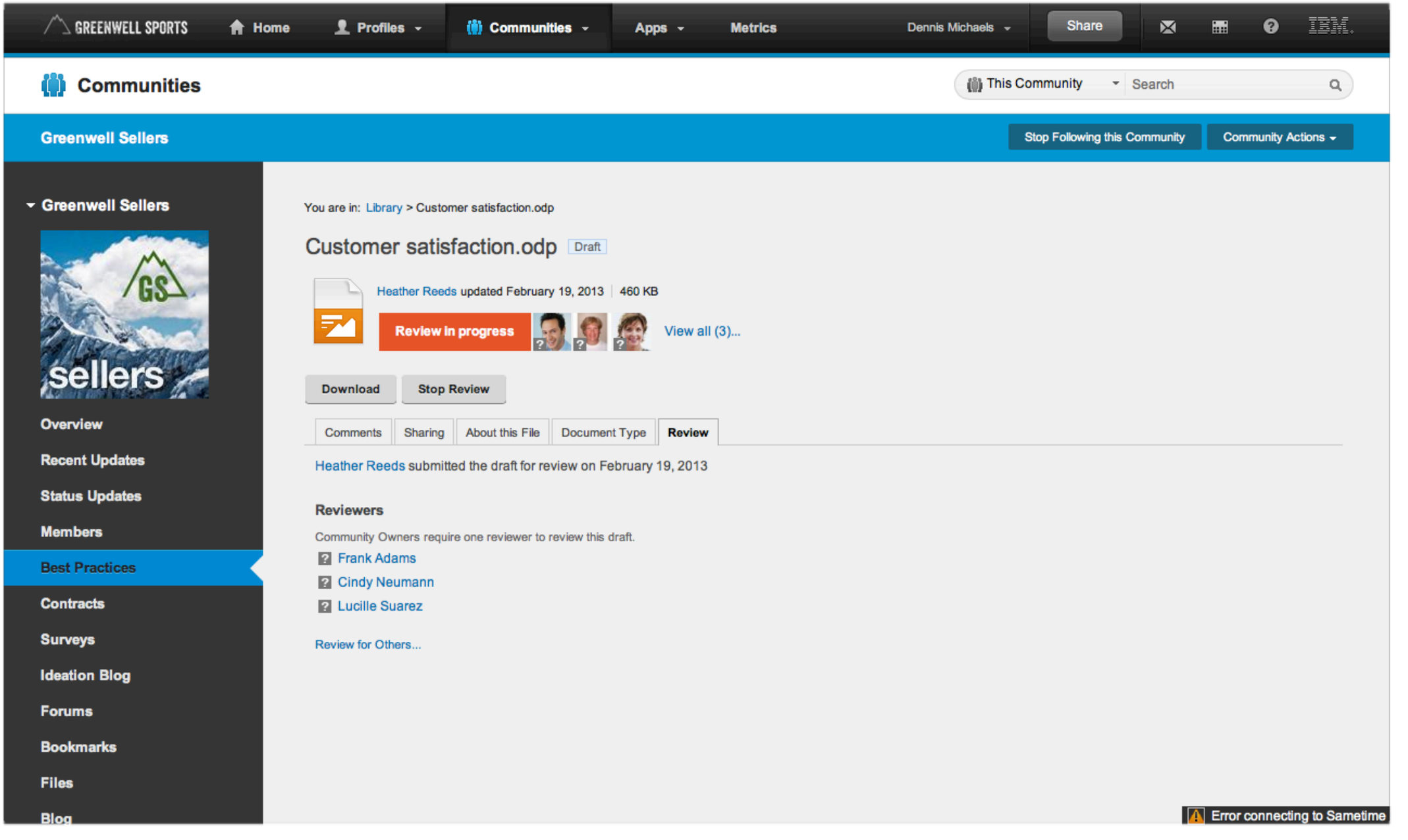


Views

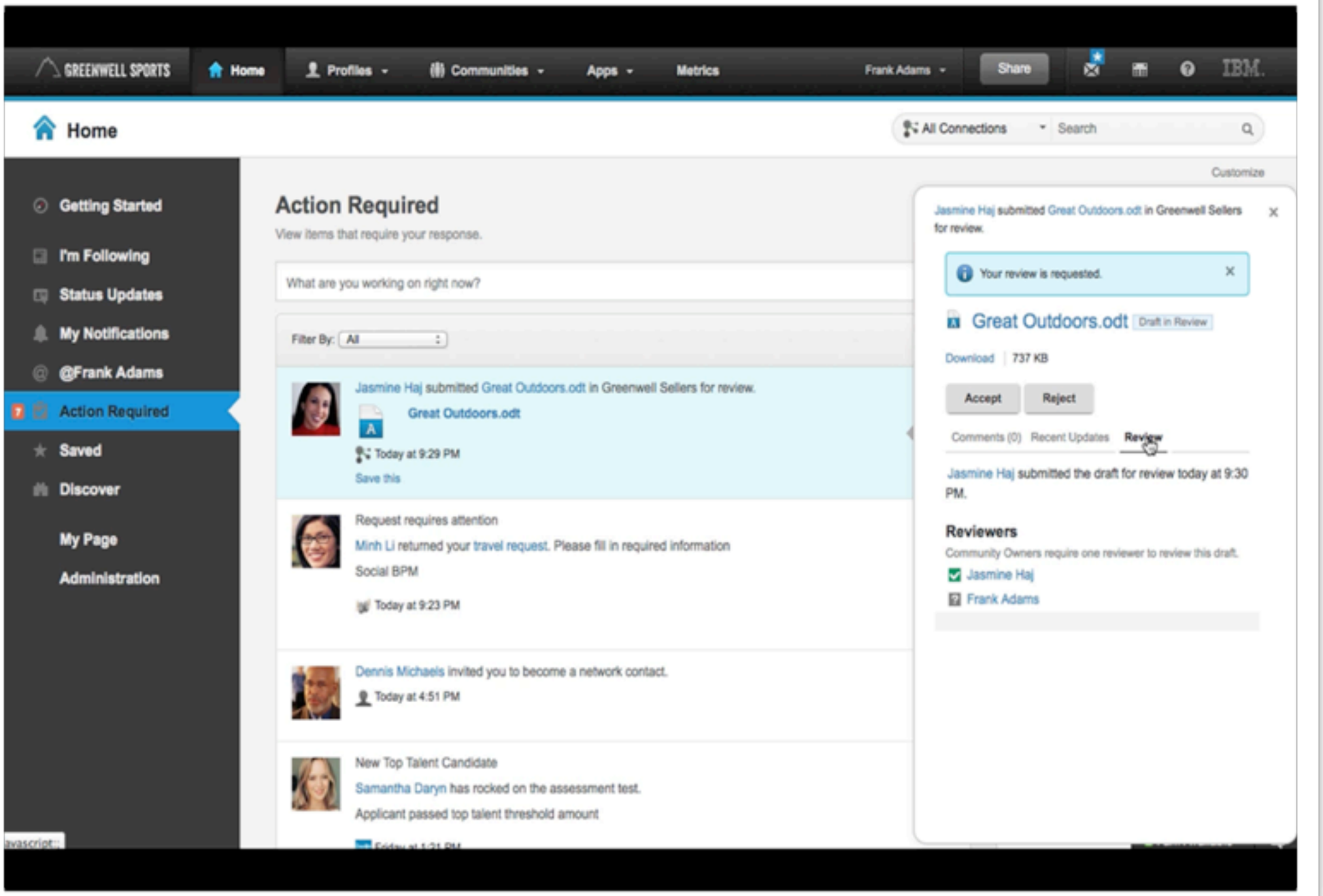
- Nested folders
- “Move to folder”
- Additional views like “My documents/pending approval”, “My documents modified in the last week”, “My drafts”, etc



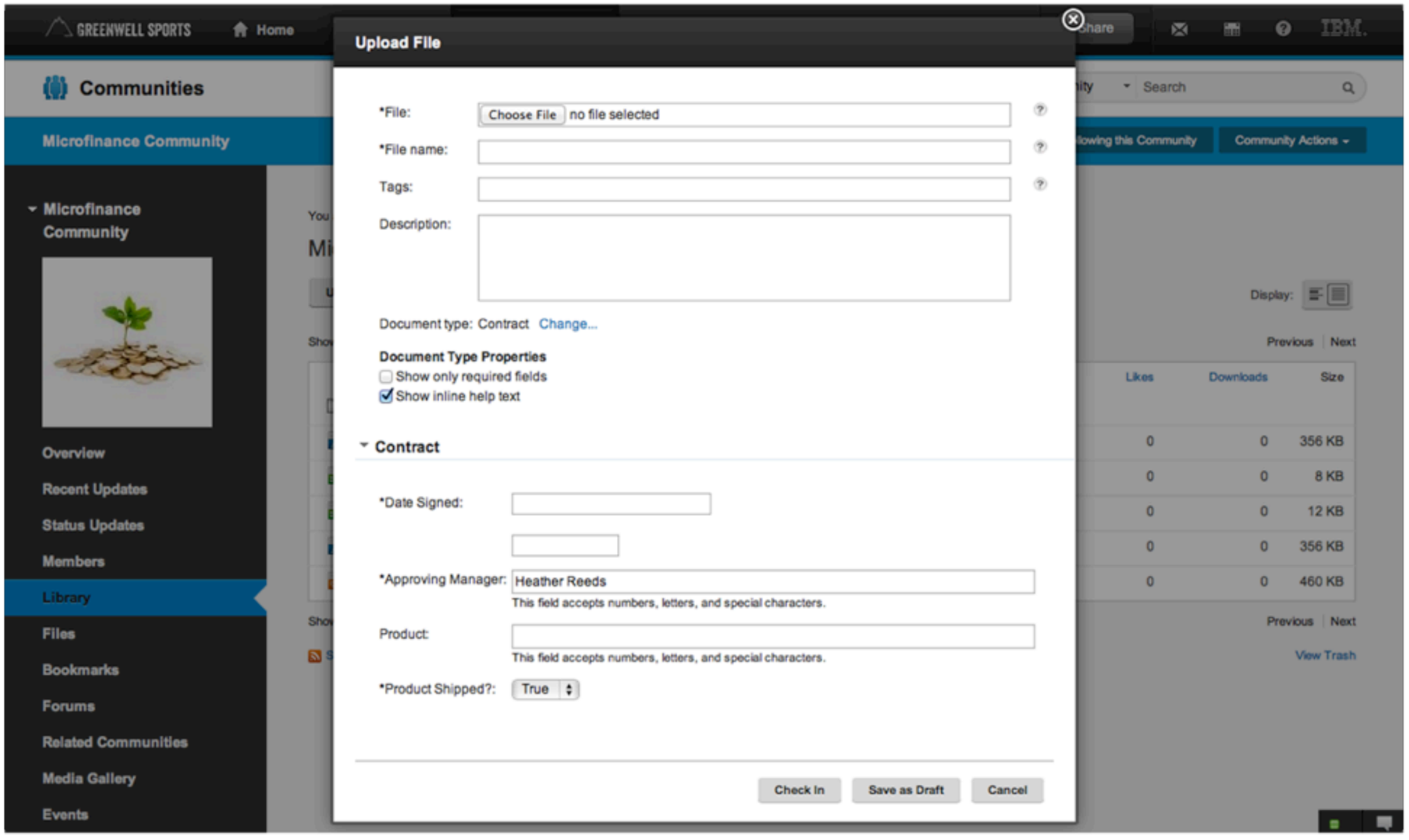
Review & approval



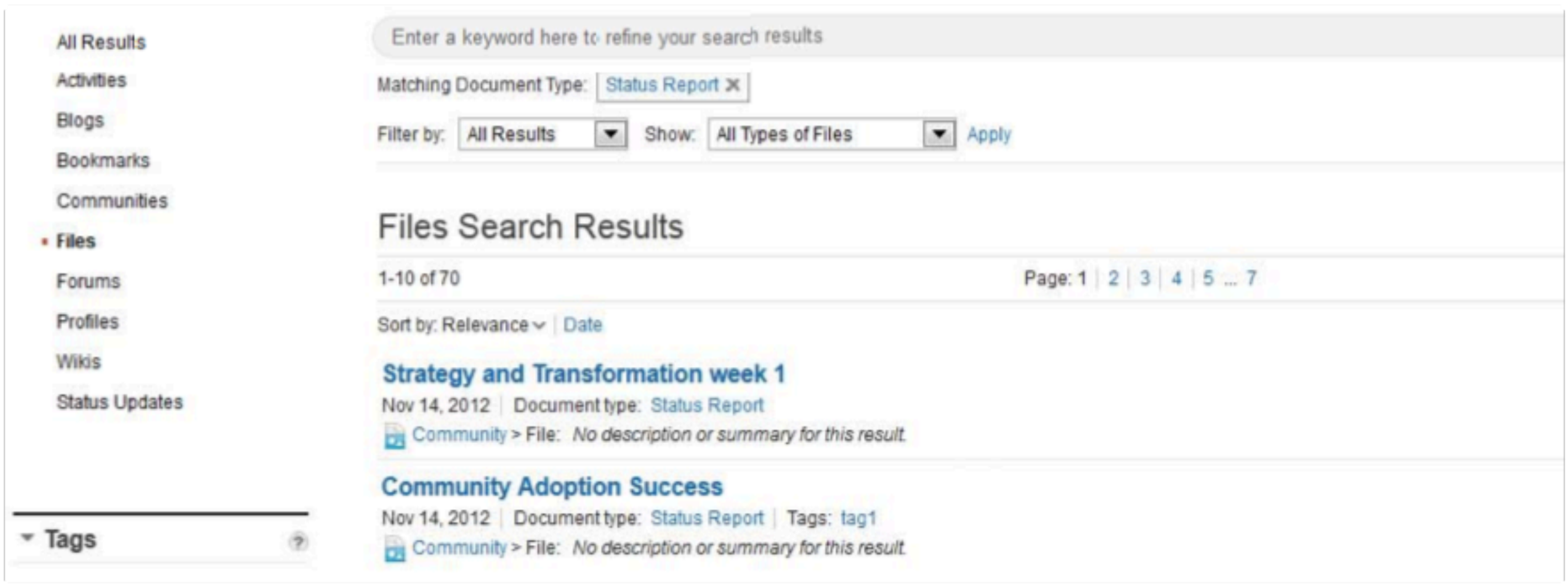
Integration with the activity stream



Document type & review set per library



Integrated search



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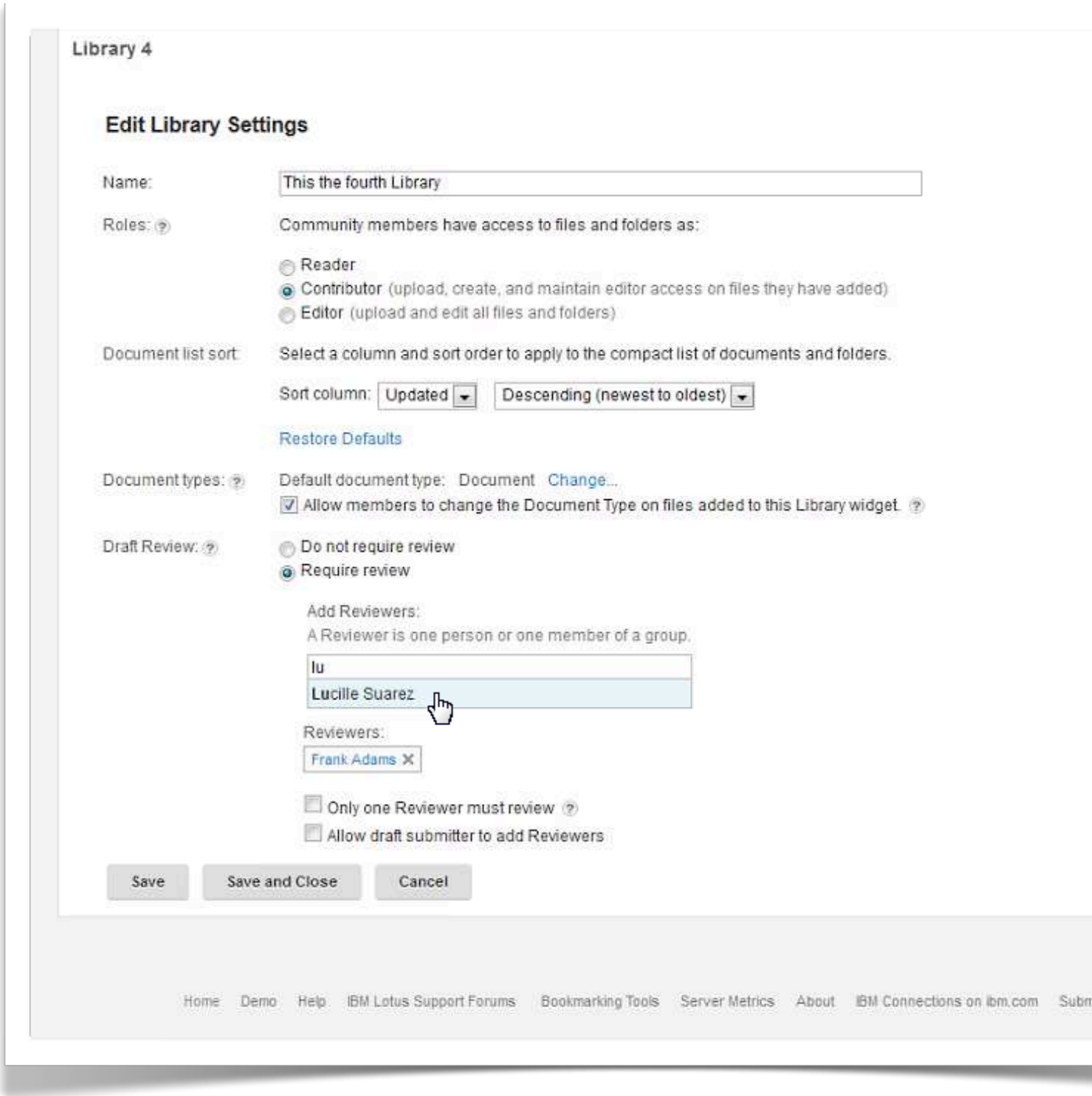
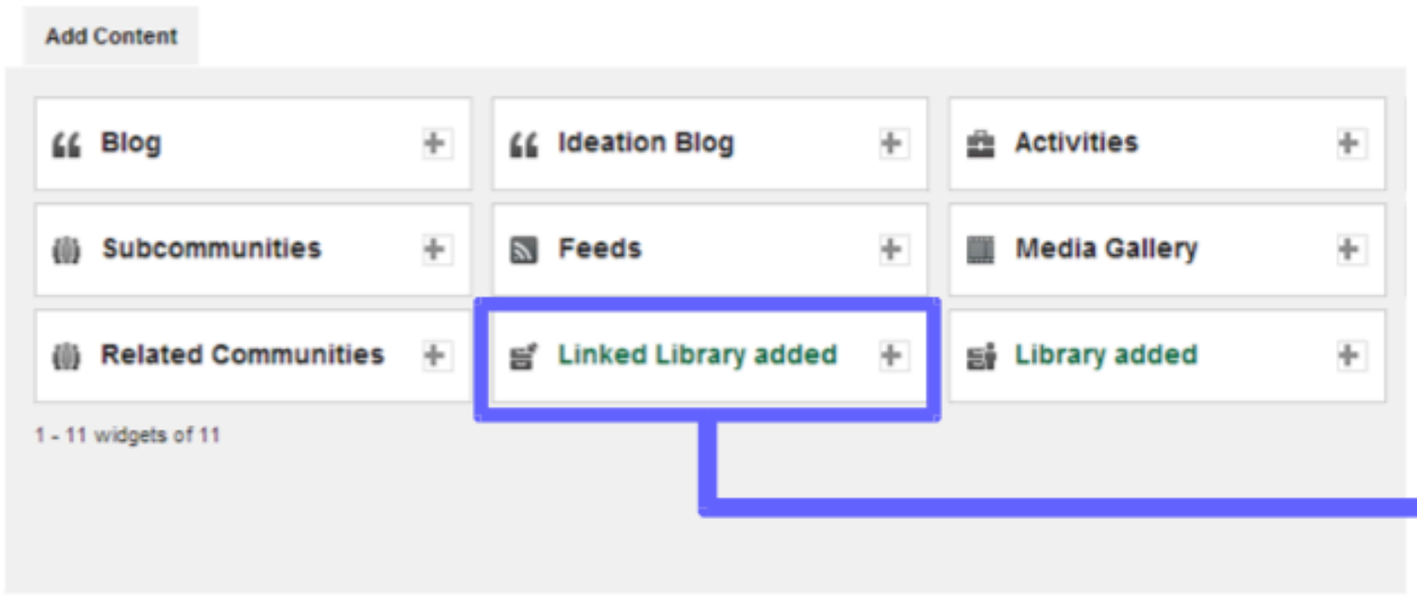
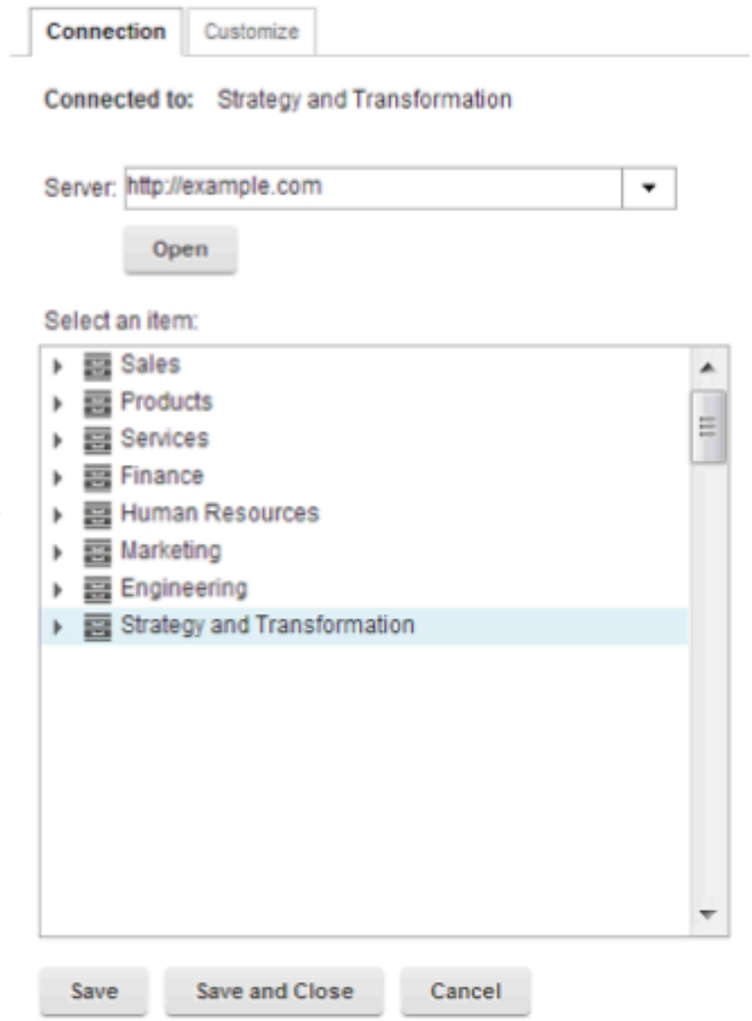
Administration

- Library creation from within Community
- Option to limit allowed document type
- Enforcing approval cycles per Library
- Multiple libraries per community
- Security per folder



Libraries versus Linked Libraries





- Security
- Control & administration
- Relation to community

Traditional ECM

- Document Centric
- Infrastructure and Centralized
- Ad-hoc Collaboration
- Metadata oriented
- Inside the firewall

Social Content Management

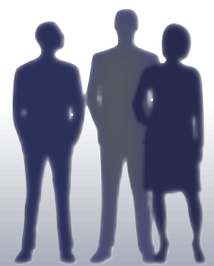
- People Centric
- Open and collaborative
- Community oriented
- Content in context… user tags & ratings
- Inside and outside the firewall

Company

Enterprise Content Management

Document Point Solutions

Document Collaboration



Document Sharing

End User

Document Libraries

Manage & control documents and ensure trustworthiness

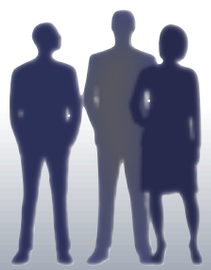
CCM

Files
Post and share, documents, presentations, images, and more

Document / Linked Libraries
Securely manage and collaborate on business documents

Community Files

Share, collaborate and relate files

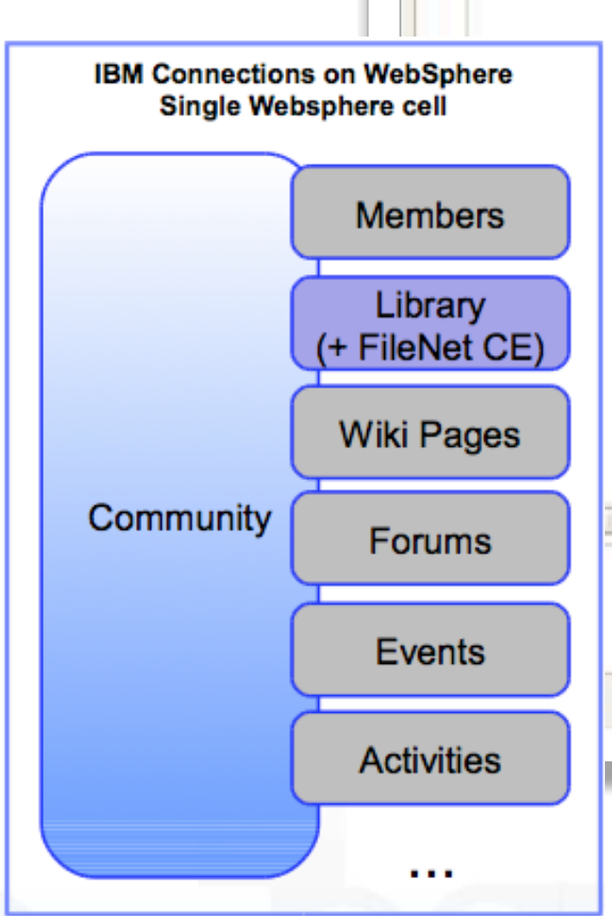


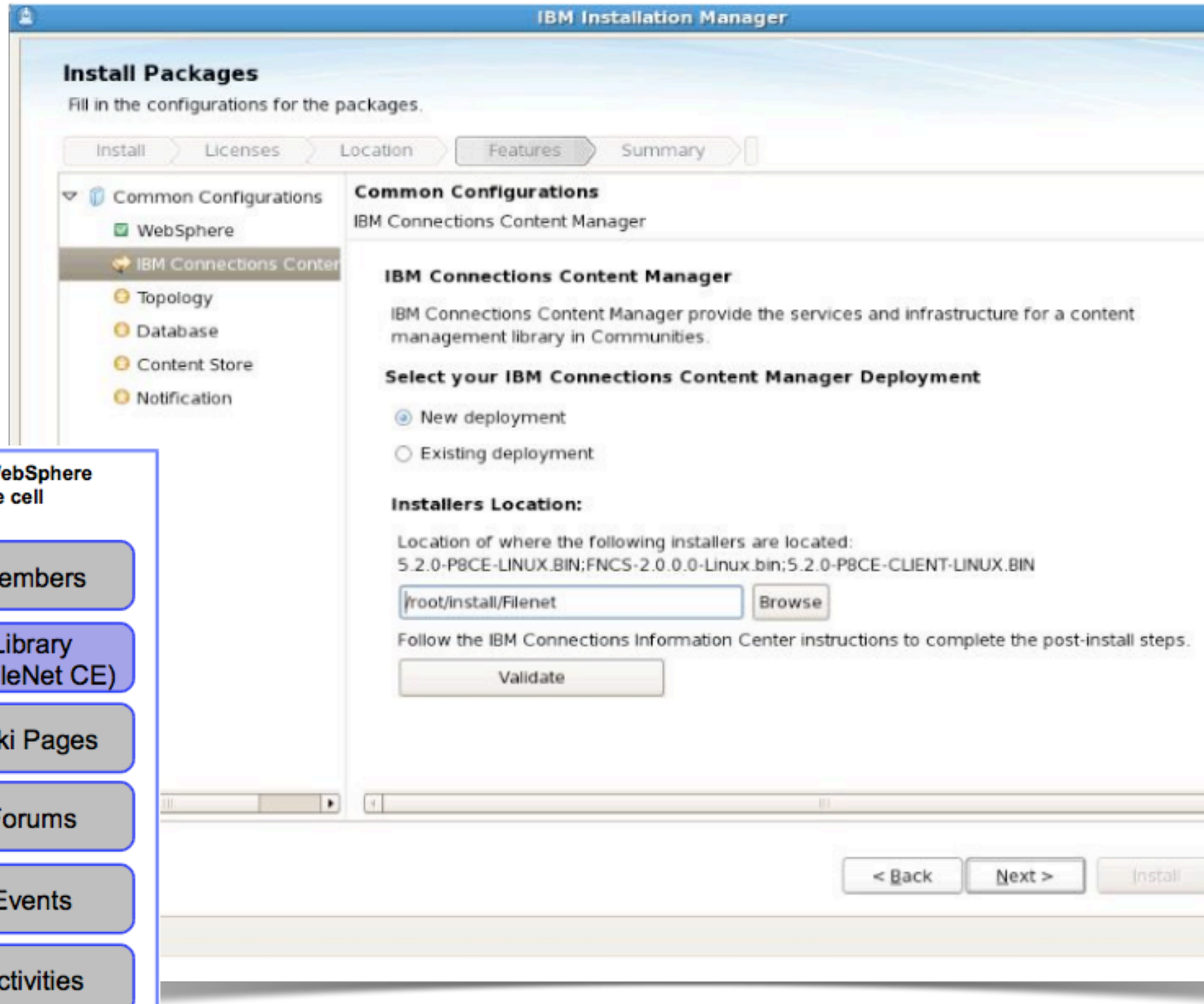
Personal Files

Store my files

Installation

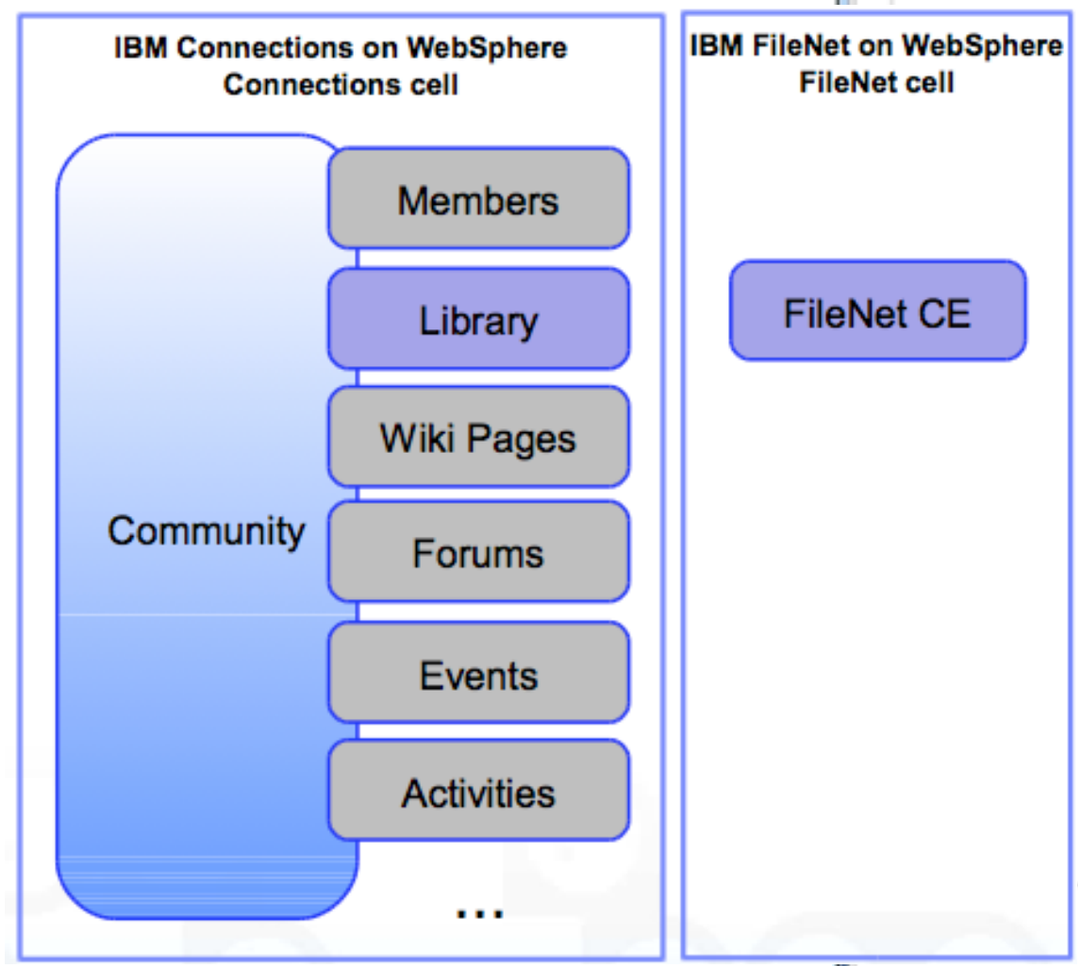
- Integrated install for CCM

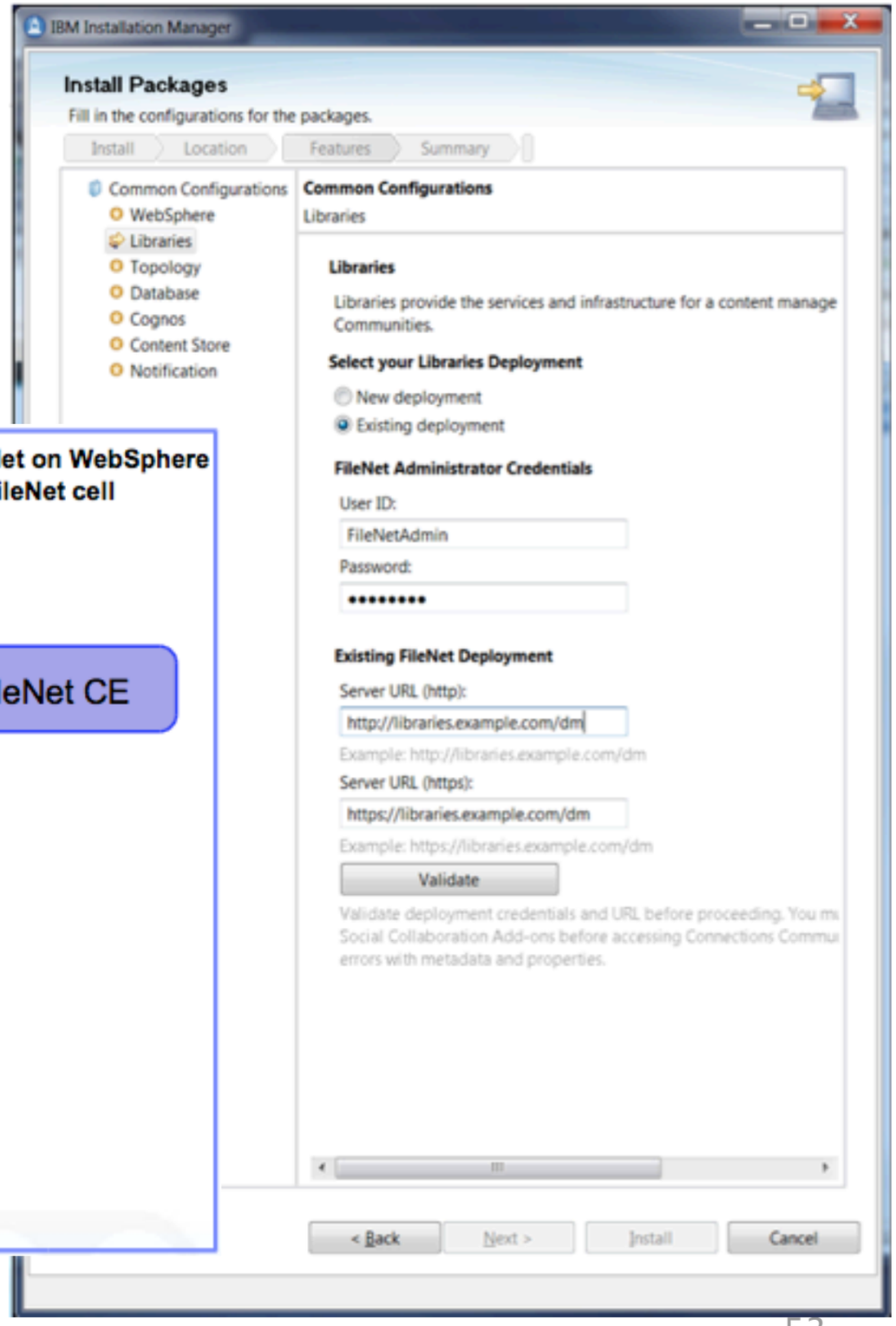




Installation

- Or by utilizing an existing Filenet environment

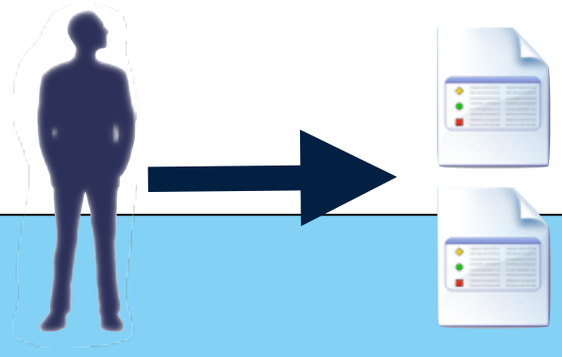




Agenda

- Evolution of information management
- Social document management
- Document Management spectrum
- What's new with CCM?
- **Strategies**

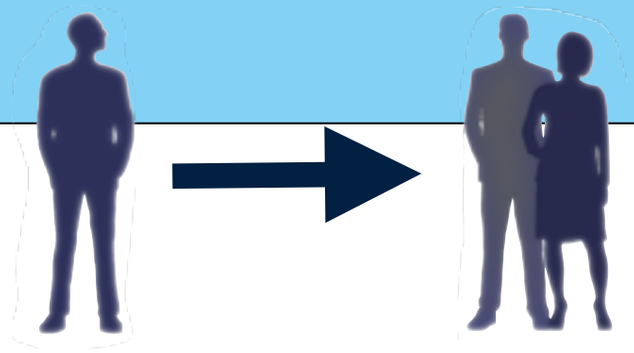
What do you need...?



Codification

Harvard Business Review

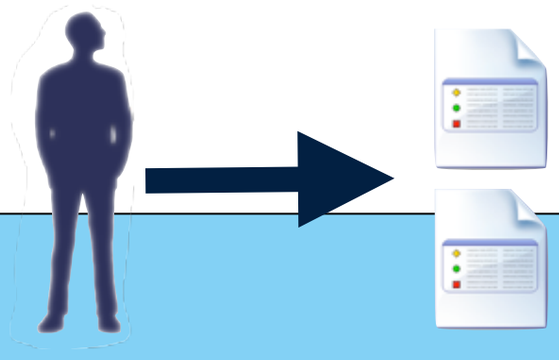
Personalization



standard or customized?

mature or innovative?

explicit or tacit?



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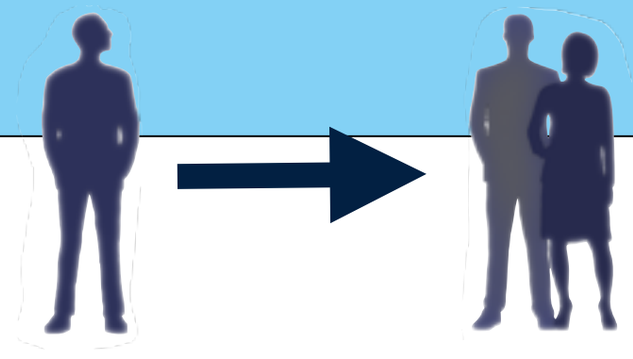

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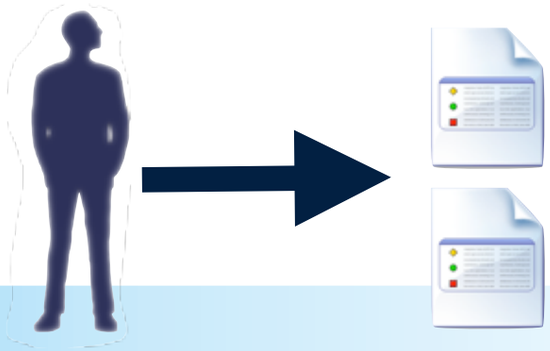
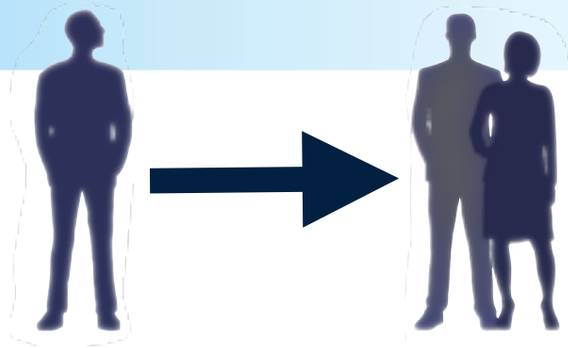


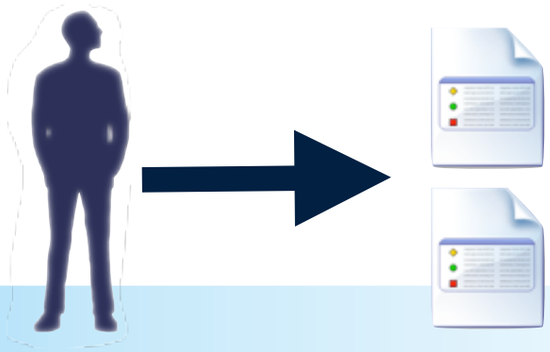
Enterprise Content Management



Document Collaboration

Personalization

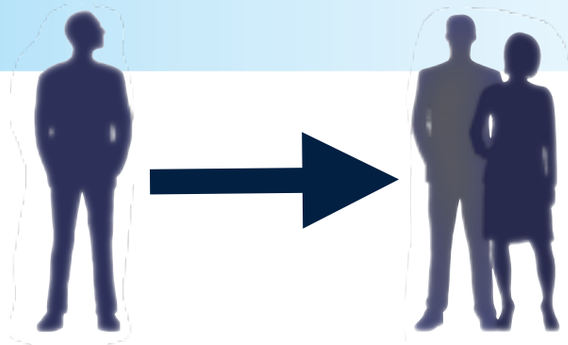
Codification



Enterprise Content Management

20-80?

Document Collaboration



Personalization

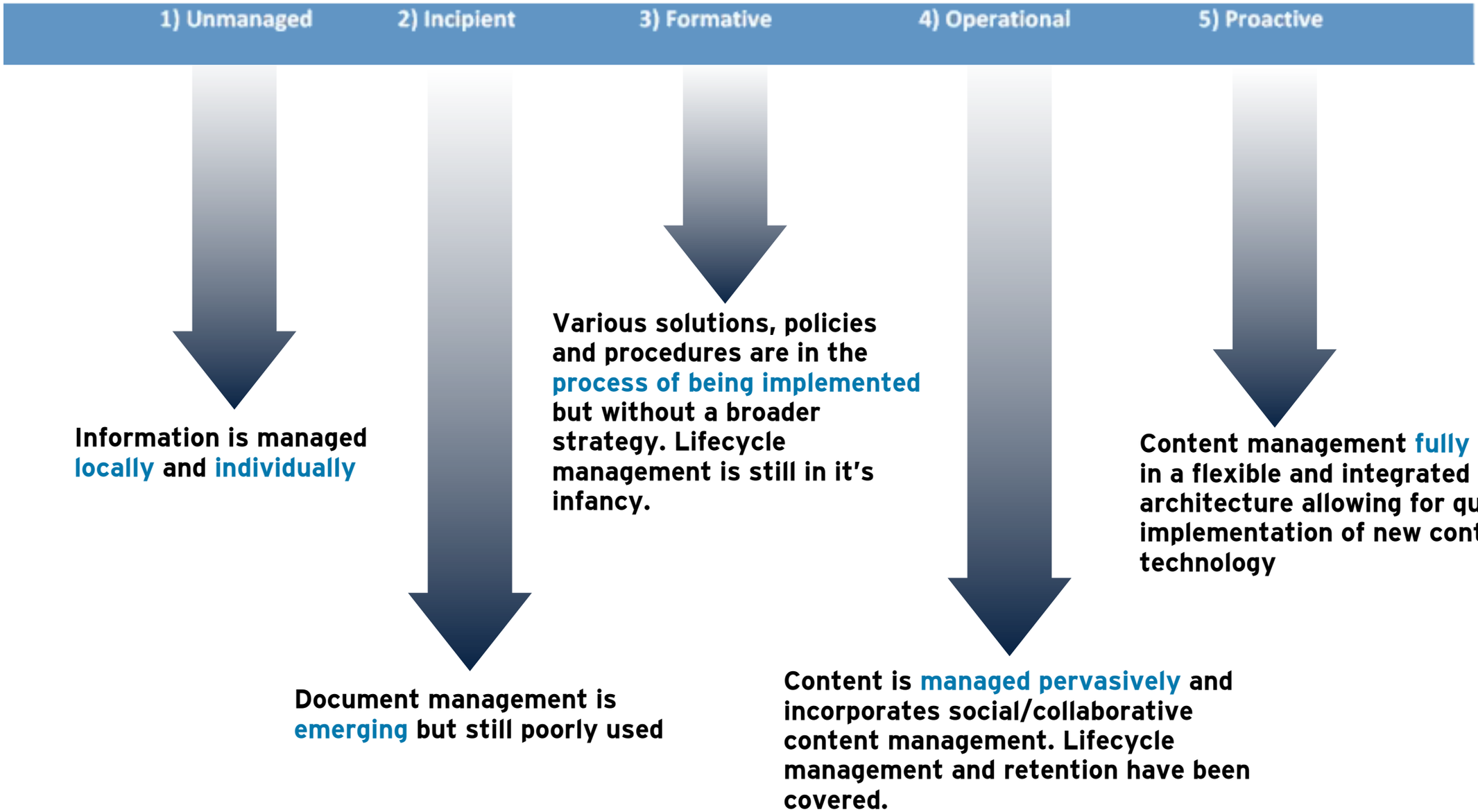
Both are important!

Where to from here...?

ecm maturity model

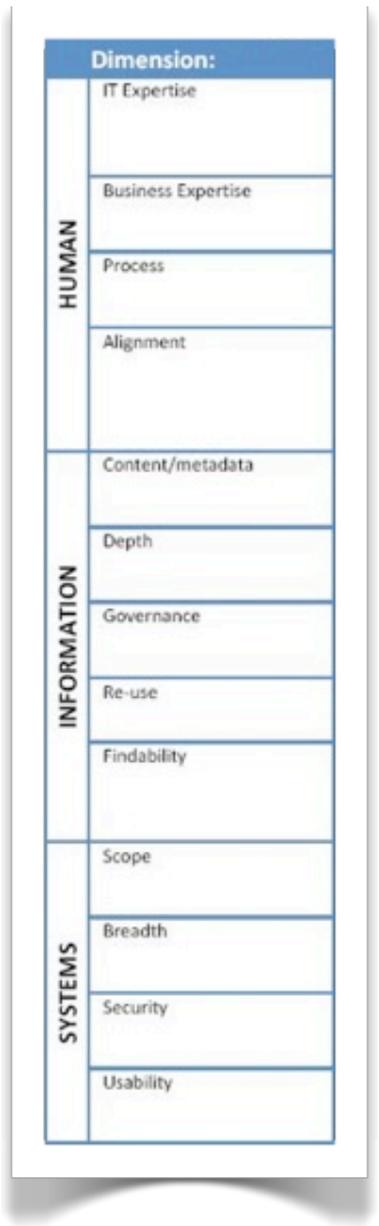
http://ecm3.org/

Maturity levels:



Source: ECM3 Model http://ecm3.org/

Categories & Dimensions:



Human
- IT Expertise
- Business Expertise
- Process
- Alignment

Information
- Content/Metadata
- Depth
- Governance
- Re-use
- Findability

Systems
- Scope
- Breadth
- Security
- Usability

Source: http://ecm3.org/

	Level:	1) Unmanaged	2) Incipient	3) Formative	4) Operational	5) Proactive	
	Dimension:						
HUMAN	IT Expertise	No experience managing formal repository and workflow systems	Struggling 1.0 implementations of some systems	More advanced version 2.0+ implementations of systems, with focus on business-critical content	Managing repository and workflow systems is a core IT skill	Pro-active experimentation and learning about emerging content technologies	**Measurement / Monitoring and Feedback Processes**
	Business Expertise	Ignorance about value and role of ECM	Growing sense of awareness about lack of management services	Communication plans include updates to key stakeholders about ECM business value	Executive sponsorship of ECM as a practice; process and content analysis are core skills	Information management designated a core employee skill and part of their HR reviews	
	Process	Few or no standardized procedures around content	Basic process analysis leads to some ad-hoc workflows	Initial modeling of inter-departmental processes to prep for automation	Automated processes span systems and departments	Robust exception-handling and experimentation within framework	
	Alignment	Key business drivers are not well understood by IT strategists, resulting in ECM gaps in IT portfolio	Gaps still exist between technology and core business processes; IT-metrics not evaluated by business outcomes	IT and Business both understand their information management roles and their respective strategies are no longer developed in a vacuum	Execution of IT & Business strategies become more cohesive, but still follow push-pull model	Strategy development between IT and the Business is done in collaborative and concurrent manner with frequent reviews using proper metrics	
INFORMATION	Content/metadata	No formal inventory; no formal classification	Departmental inventories and initial content tagging	Enterprise inventory underway; controlled vocabularies (CVs) initiated	All new repositories and content types registered; global taxonomies created	Pervasive ROT elimination; Folksonomy development; Ongoing metadata reviews	
	Depth	No lifecycle management	Most content archived haphazardly; some departmental RM efforts	Development of formal electronic retention, RM, and disposition schemes	Implementation of electronic and paper-based RM across the enterprise	All content types go through formal lifecycles.	
	Governance	No policies and procedures	Scattered policies; few or no formal procedures	Development of information governance structure and codification of procedures	Policies and procedures widely disseminated; Enterprise ownership in place	Active review and adaptation; Voice of Customer key to feedback process	
	Re-use	Content routinely duplicated	Content still routinely duplicated, but staff aware of problem	Initial content analysis and structuring	Documents repurposed across systems and channels	Content components re-used across systems and channels	
	Findability	Employees spend excessive time searching using various internal search engines	Search indexes tuned and basic metadata applied	Rationalization of search technology; analysis of search logs and further tuning, leveraging CV terms	Development of specific enterprise and/or federated search applications	Search and classification become a central service, with business-driven variants	
SYSTEMS	Scope	No understanding of core content types	Some basic DM implementations with ad hoc workflow	Identification of core content types, locales; pilot projects for DAM, BPM, etc.	Business-critical information systems prioritized	Broad availability of diverse management systems	
	Breadth	No systems	Scattered departmental efforts	Initial attempts to combine or integrate systems across departments	Successful departmental initiatives have been scaled enterprise-wide	Encourage and adopt innovations from departmental levels	
	Security	No security regime in place	Dependent on individual systems	Formal projects initiated to address gaps & redundancies due to multiple solutions	Standardized policies and procedures exist and are system enabled	Security is treated as a centralized shared service	
	Usability	Lack of systems make end user usability considerations moot	Employee adoption rates measured, but dissatisfaction unanalyzed	Some initiatives use Scenario Analysis and User Persona techniques to guide design	User-centered design underpins all system designs, with formal collection of user feedback	Usability is a guiding principle in all system activity	

Source: ECM3 Model http://ecm3.org/

← "Enterprise ABC" ECM Maturity Levels

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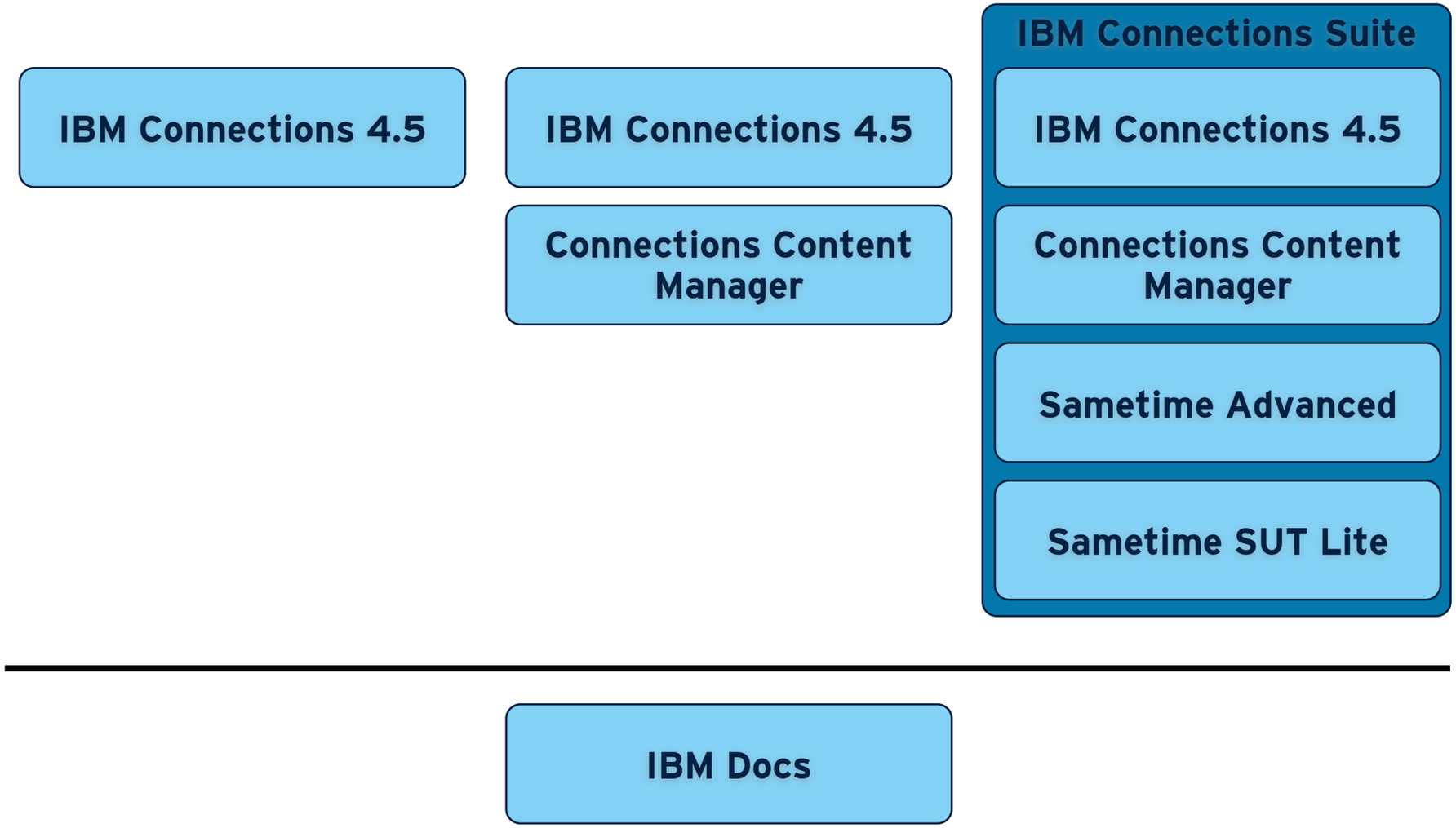
Measurement / Monitoring and Feedback Processes

Source: ECM3 Model http://ecm3.org/

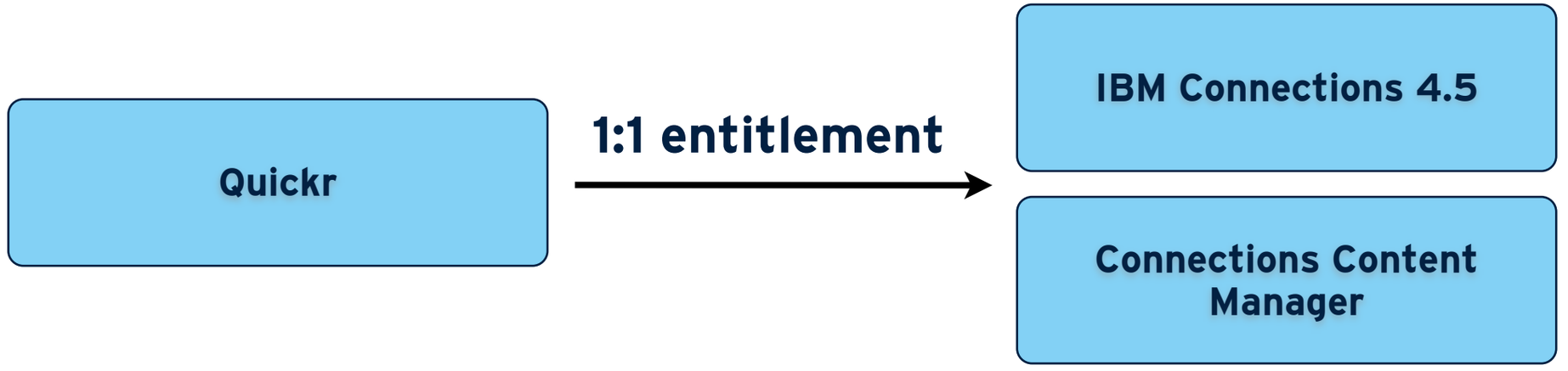
BE PRAGMATIC

Plans

- IBM Connections 4.5
- IBM Connections 4.5 + Connections Content Manager
- IBM Connections Suite



Quickr to social?



Agenda

- Evolution of information management
- Social document management
- Document Management spectrum
- What's new with CCM?
- Strategies

Questions?

Thank you!

- Twitter: @FemkeGoedhart
- LinkedIn: http://nl.linkedin.com/in/femkegoedhart
- Blog: http://femkegoedhart.com
- Slideshare: http://www.slideshare.net/femware