Electronic Content Management

The Right Tools

An enterprise content management (ECM) system is a framework for storing and organizing data. At its most basic level the system is just a digital filing cabinet. The City is leveraging two programs: OnBase and SharePoint, for its ECM framework. Together these two programs can offer a wide array of powerful functions that can take your digital filing cabinet to the next level. Let's take a closer look at the three ways these tools can help enhance your ECM.

The storage of your content is important. But what does content mean? Content can be any number of things: Word documents, pictures, tax forms, or even videos. Our system gives you the ability to convert paper documents into a digital format, organize your content into libraries and lists, label the content with meta-data for searching purposes, and apply retention policies so that outdated content is managed more efficiently.

Store

Manage

It's not enough to just store your content; you also need to be able to control it. The modern office is full of distractions. Workflows can help you to automate repetitive tasks, and free you up to focus on whats really important. Why do everything yourself? Permission controls will help you to change who can access your content, and collaborative tools can help you to work together with your colleagues.

Deliver

The days of hunching over a filing cabinet desperately hoping that something wasn't misfiled are over. What good is keeping the content if you can't find it later? ECM lets you quickly search through and deliver your content in an attractive package as well. Your content is also available in new places thanks to the mobile office tools. ECM tools can save your back, and save your time.

Convert

Buried under a mountain of paperwork? An Enterprise Content Management system has scanning procedures which can turn that mountain into a molehill. OnBase is able to take those scanned documents, put the information into its database, lets you actually search through the information, and add notes or mark-up to the documents. Let's be honest, the days of keeping paper copies of everything are over.

Budgets have just been submitted, why not turn those crumpled coffee stained reports into a digital version? Once your paperwork is digitized you can use the other tools inside the ECM system to do powerful things with them.

Meta-Data

OK, you've scanned your budget reports, and now you have a very pretty picture of them. Meta-data will help turn it into something that you can actually use. Meta-data is simply a way to label your data. If the system is the filing cabinet, then the meta-data is the organization of the filing cabinet drawers. This organization could take almost any form: The name of the person who created it, a work order number, an address or anything else your department decides to include. An ECM system is able to use this meta-data to sort all the content, and help you find it later. Having accurate meta-data makes it easy when it comes time to find last years budget reports.

Libraries

A library isn't just for books. Here it means a collection of content. This content could be spreadsheets, presentations, or even those tax forms we converted earlier. All the data is stored in libraries, giving users a way to search through the content in a centralized easy-to-read fashion.

Can't find your report from yesterday? No worries. One click can show you a library of all the files you use everyday. Another click can lead you to a list of every employee you work with. A third click can show you all the work documents you have to review.

Retention

Not all documents are created equal. Some things must be kept forever, while some things can be discarded. With the Records management features of our ECM system it's easy to sort your content into must-keeps, might-keeps, and don't-keeps.

Does the Legal department need to keep a lease? Does ESD need to keep a list of employees from 15 years ago? Each department can use ECM standards and practices to create specific rules to help them decide what is important, what is trash, and what will be trash in the future. These rules can stop the molehill from turning back into a mountain, and free you up to focus on the tasks that really matter.

Permissions

Users permissions are central to a Enterprise Content Management system. If our system is a filing cabinet, then the user permissions are the keys to that cabinet. Want to show your colleague a report? Give them permission to access the file. Need to give the public access to your report? With a few clicks it will be viewable by anyone.

Instead of managing the permissions for individual users it is also possible to permit groups of users to access your filing cabinet. Instead of giving permission to Mike the new guy, you can just add him to your projects group and give everyone in that group access to view your files. This will make it much easier to manage the keys to your filing cabinet.

Workflows

Workflows are one of the most important tools built into our system. A simple explanation is that they are ways to automate your work for you. Need to forward a request to your boss? Need to schedule a day off? Workflows can do all that and more. A common workflow example involves capturing, storing, routing and notifying staff of necessary tasks they must do to complete contract reviews and renewals on time. Workflows like this are able to use a queue to give you an at-a-glance view of what work still needs to be done. The IT department is willing to work with you to see how your job can be simplified by workflows.

Collaboration

Permissions allow you to share your files with others, and workflows can automate some tasks, but ECM can allow you to do more. The collaboration tools of our ECM help you share your files and then work together with others. Let's try an example: It's time to create a multi-departmental presentation for a community group. First you might email another department for some information, and hope that their response is in the right format. Then you need to format it for your supervisor to … wait, let's make this simpler. Why not give permission to your counterpart in the other department, and have them edit the information directly. Thence how about sharing the presentation with your supervisor and have them give feedback directly onto the presentation. Simple, huh?

Versioning

Now you've shared your document with other people, but what if somebody makes a mistake? You've put hours into the presentation, you don't want to see it messed up do you? With the versioning controls in our system it's easy to keep track of the revisions you've made, as well as the revisions your co-workers have made. Our tools will ensure that every person is seeing the same changes. If you decide that the original was better it's simple to just switch back to the previous version. That presentation? Both your boss and the finance department will see the same changes, and, even better, you'll be able to undo any mistakes which might be made. Think of it as a super-powered undo button.

Searching

What good would a storage system be if you couldn't find anything inside of it? You've got your paper documents converted, your meta-data assigned, and your permissions granted. Now it's time to search through the library for a file. The meta-data assigned earlier can help you to search through the files.

Did a citizen pay their water bill? Search by their address.
Did your boss create a memo for the department? Search by their name.
Did you create a spreadsheet? Search by all the spreadsheets you've made.

Styling

Our tools can take your information and present it to you in an attractive package. The IT department has designed several templates which departments will be able to choose between. Those templates will connect you to the files you need, help you to manage those files, and look good while doing so.

Is the style consistent for the public? Yes.
Can you find the information you want? Of course.
Does it make you cry tears of happiness? We hope so.

Mobile Office

Who wants to be stuck in their office all day long? An ECM system gives you access to your content in new and exciting ways. Using SharePoint and OnBase will increase the number of ways you can access your content without sitting at your desk.

Stuck in a meeting? Use your laptop.
Stuck in line at a coffee shop? Use your phone.
Driving through traffic? Keep your eyes on the road!