Implementing an Enterprise Information Management Strategy
An Approach That Mitigates Risk and Drives Down Costs

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Table of Contents

Wouldn't it be nice if you could use any content in your organization to enrich business processes? Wouldn't it be good to connect any content to improve visibility, increase production system performance, and improve compliance? Wouldn't you like to manage your content in a more cost-efficient way, reducing your total cost of ownership? Read on to gain insights into how a combined approach to information lifecycle management and enterprise content management can make this a reality for your organization today.

Content and Opportunity

Data, information, content – call it what you will, it's essential to business success. Due to new technologies and a seemingly unquenchable thirst for insight, it's also growing exponentially, which makes it difficult to manage. Companies that can manage the volume and variety of data in an agile manner can react better to shifting consumer preferences and changing market conditions, which means ongoing business advantage.

One practice that stands in the way is based on a technical anachronism that views structured data and unstructured content as two separate worlds, most often managed by two distinct groups within the enterprise. Structured data includes data from your core SAP® applications – such as the data related to financial transactions or customer records. Unstructured data is basically everything else – for example, e-mails, blueprints, presentations, text files, or scanned paper documents. Both are equally important to business success. Why manage them separately?

At SAP, we believe that a uniform approach to managing enterprise content – both structured and unstructured – can help you improve business performance and mitigate risk. One thing is perfectly clear: as content continues to grow, it is no longer feasible to save everything, everywhere, forever. Organizations need to get serious about how they manage information, setting clear policies for data protection, retention, and destruction that comply with regulations and align with corporate strategy. After all, in today's world, the way you manage your content is almost as important as the way you produce and deliver your products and services.

A Combined Approach

A combined approach to managing structured and unstructured data brings together the worlds of information lifecycle management (ILM) and enterprise content management (ECM). ILM – which focuses on structured data – enables you to manage data volumes and compliance with legal and regulatory mandates at the same time. It helps you apply retention times and destroy data after the expiration date is reached. ECM – which focuses on unstructured data – typically involves a methodology and underlying software to help you create, store, archive, and collaborate on the content that is important to your business.

Traditionally, the market has offered solutions that focus on specific aspects of each. But instead of the gradual approach of implementing multiple targeted solutions as the need arises, SAP argues for a more proactive global approach that combines both worlds to manage content across the enterprise and throughout the information lifecycle.

The benefits of such a combined approach can be tremendous. Take, for example, an order fulfillment process where you scan paper invoices into an unstructured data store and key the data from the invoice into the SAP ERP application. With a combined approach, you can establish a central retention management instance to manage both the scanned invoice and transactional data associated with it. The retention period is automatically derived from the structured data and propagated to the unstructured content to which it is linked. The link between the two, moreover, persists after payment is received, after information is archived, and until final data is destroyed – all according to retention policies you define or any legal holds that may apply. This accessibility throughout the information lifecycle facilitates knowledge-sharing across the organization and enables enterprise-wide compliance with consistent records management.

A combined approach to ILM and ECM enhances business processes by linking structured and unstructured content from the time of creation to destruction – enabling you to move more content into less costly archives while maintaining accessibility.

Considerations for Moving Forward

THINK GLOBALLY, ACT LOCALLY

So how do you get there from here? Our advice is to start by thinking globally. Content management is an enterprise issue – not the domain of any specific line of business or department.

Start by analyzing the content management needs of the enterprise. Do you already have a system or strategy for managing either structured or unstructured content? If so, you may want to extend one or the other to meet the needs of the enterprise rather than those of a particular unit within your organization. If not, your job is to put one in place.

The goal is to define processes and proper governance procedures that can be replicated enterprise-wide. This gives you a template that you can use to roll out a standardized solution to all business units.

VISION AND PLANNING

Remember to view the initiative not as a mere technology project but rather a fundamental change in the way you manage one of your most important assets: information. As such, you'll need to align IT, the business, and your legal department, bringing together all stakeholders to drive consensus. This requires strong executive leadership. If your project is driven by IT alone, you cannot assume the executive backing you need to drive an enterprise-wide initiative. It's best to take the pains early to ensure that your initiative is global in nature.

The bulk of the work during the planning stage is defining the policies that govern content archiving, retention, and destruction. Nobody understands the business issues involved better than the managers of individual business units, so be sure to reach out to them. It is also important to keep in mind country-specific regulatory and industry-specific compliance requirements, which can vary significantly. Data management consultants with industry expertise can help accelerate the decision-making process with best practices for certain categories of content.

The project plan that you ultimately generate needs to keep the strategic objectives of the initiative in mind – reinforcing them each step along the way. Each phase of the project should build toward the enterprise-wide objective of a globalized approach to managing content. This should be established and reinforced with a project road map that defines the scope, clearly sets out project objectives, and secures the sign-off of all stakeholders.

GOING LIVE WITH YOUR SOLUTION

The implementation of a combined ILM and ECM solution will take different forms for organizations in different circumstances. Organizations starting from the bottom up will have more work to do than those that already have a system in place for managing structured or unstructured content or that have an established archiving strategy.

When the time comes to implement supporting software, a clear enterprise-wide strategy should be firmly in place.

While your plan should be global in nature, your rollout should focus on a particular business unit within the organization. This gives the implementation team the opportunity to identify issues and rectify them on a smaller scale without impacting the entire business.

The technical objective of the solution template is to reflect a homogeneous approach to content management throughout the organization. As such, the ultimate solution should include a centralized administrative cockpit for managing both structured and unstructured content. Specific rollout procedures, furthermore, need to be defined based on best practices to ensure a positive implementation experience. Together, these measures help minimize the total cost of ownership for the entire solution.

How SAP Can Help

PLANNING

During the planning phase of your combined ILM and ECM project, SAP Consulting teams up with you to design a global approach that works best for your organization. Our seasoned consultants help analyze your environment and devise a plan for moving forward based on what you may already have in place. We also work specifically with your business area domain experts to best understand the kind of data you create and store and which data is relevant for retention. Working with you to identify and classify your data with an in-depth analysis of your system landscape, we help you develop a tailored data management strategy that fits your business needs. This planning phase takes into consideration both business and IT concerns for a combined, company-wide retention strategy. A prototype or a proof of concept with a restricted implementation scope provides an initial high-level evaluation of the proposed strategy.

IMPLEMENTATION

For the implementation, we adopt a combined software solution approach that can start with the SAP NetWeaver® Information Lifecycle Management component. This component provides dedicated retention management functionality that enables you to enter different rules and policies reflecting various criteria, including where data is stored, the duration of data retention, and when data can be destroyed.

In addition, SAP provides enterprise content management solutions such as the SAP Invoice Management application by OpenText or the SAP Document Access application by OpenText. Integrated with SAP Business Suite software, these solutions enrich your business processes with unstructured content. Key functionality includes the archiving and storage of data and documents, continuous access throughout the information lifecycle, and scanning.

Working with you, our consultants set up your landscape, including software and storage solutions, and configure the solution according to your needs. Using proven best practices and a clearly defined methodology, we then move you quickly toward your goal of more effective content management throughout the organization. In the end, you'll have a secure, scalable, global solution for creating, archiving, retaining, and destroying content according to criteria that make the most sense for your organization.

LEARN MORE

A combined approach to information lifecycle management (ILM) and enterprise content management (ECM) enhances business processes by linking structured and unstructured content. It offers you a central retention management instance that automatically links structured data and unstructured content from the time of creation to destruction. This linkage enables you to move more content into less costly archives while still maintaining accessibility. And with clear policies in place to manage the archiving, you'll enable regulatory compliance and reduce the business risk of your organization as a whole.

To learn more about how SAP® solutions and SAP Consulting can help you combine ILM and ECM for more effective content management, contact your SAP representative today.

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