

Document and Content Management

Course Outline



Whether thinking in terms of documents, ideas, or actions, a simple and efficient method of capturing, locating, articulating, using and managing content and knowledge in the enterprise is needed.

Good document and content management increases the range of available business solutions, uncovers hidden business strengths, represents an opportunity for value-added supplier relations and brings a working meaning to the idea of intellectual capital.

Knowledge is the end result of efficient and effective delivery and use of content in the enterprise. Success in content management requires careful attention to the relationship of documents, their content and the knowledge that evolves from that content. All of these are parts of the intellectual property of the enterprise.

This seminar presents document, content and knowledge management in context of business need and value by relating directly to work performed.

This course provides participants the basic tools necessary to assess and plan for the document and content management capability in an enterprise. The techniques described in the course are useful for bridging the gap between expectations and reality, providing a means to leverage existing efforts and increase value by focusing the efforts on projects with quick payback. Tools and technology considerations provide an opportunity for IT excellence in the management and delivery of content to users.

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Module 1– Content Management Today

- Course Objectives and Structure
 - Intellectual Property of the Enterprise
 - Document, Content and Knowledge Management
 - Document, Content and Knowledge Relationship
 - A Content Management Approach
- Exercise – Document and Content Management Readiness*

Module 2: The Document and Content Value Proposition

- Content Management Business Motives
- Content in Business – Getting buried with information
- Leveraging Document Management
- The Content Management Cycle
- Content Management Methodology
- Typical Starting Content Initiatives

Exercise – Identifying, Valuing and Ranking Enterprise Content

Module 3: Creating, Gathering and Capturing

- Document Management Approaches
- The Content and Knowledge Assessment
- The Content Repository
- An Incremental vs. Enterprise Content Approach

Demonstration – A Simple Document Management Tool

Module 4: Managing and Delivering Documents and Content

- Document use and Reference Analysis
- Organizing Documents – Records Management
- Decomposing to Content
- Organizing Content
- Local, Enterprise, Inter-Company and Global Content
- Publishing Content and Documents

Exercise – Identifying Local Knowledge'

Module 5: Practical Use of Documents and Content

- Different Functional Views of Content
- Locating Documents and Content
- Publishing – Internally and Externally
- Positioning Content
- A Positioning Example

Exercise – Identifying Useful Content

Module 6: Content and Process

- Processes - the Core of the Enterprise
- Basic Process Mapping
- Content - the key process enabler
- An example - Workflow Provisioning and Positioning

Demonstration – A Workflow Tool

Module 7: Metadata

- The Metadata Concept
- A Metadata Methodology
- Document, Content and Knowledge Metadata
- The Metadata Repository
- Capturing and Managing Metadata

Exercise – Locating and Identifying Metadata

Module 8: Taxonomies - Classifying Content and Knowledge

- Structures of Documents and Content
- Taxonomies, Ontologies and Content Domains
- Classification Approaches
- Content Architecture
- Integrating Content Taxonomies – The New Challenge
- Integrating Content and Knowledge

Exercise – Creating a Taxonomy of Documents

Module 9: Portals

- The Portal Concept
- Collaboration and Content
- Components of a Portal
- Delivery of Content via Portals
- Portals and Taxonomy
- A Portal Taxonomy Example – Documents, Content and More

Demonstration – A Portal Tool

Module 10: Managing and Measuring Content Performance

- Getting Results
- Metrics for Managing Content
- Capturing, Using, Matching to the Enterprise,*
- Measuring the Content Process
- Best Practices for Content Management
- Roles, Responsibilities and Governance
- The Content Management Project

Exercise – Which metrics to use

Module 11: Protecting Enterprise Content and Knowledge

- Content Security
- Essential Content and Knowledge Acquisition
- Content and Knowledge Loss in Businesses
- The Processes - Content Link
- Legacy Content and Knowledge

Exercise – Identifying Essential Knowledge

Module 12: Content Warehousing

- The Basic Warehouse Structure
- Taxonomies and Categorization
- The Document Repository
- The Content Repository
- The Knowledge Warehouse
- Managing a Warehouse Environment

Exercise – Determining Content Warehouse Needs

Module 13: Tools and Tool selection

- Basic Tool Selection Methodology
- Types of Tools
- Taxonomy, Classification, Mining, Delivery, Search, Warehousing, Metadata, AI
- Types of Deployment and Delivery Technology
- Extranet, Intranet, Extranet, Desktop, Enterprise
- Tool Evaluation Checklists
- Standards

Exercise – Preparing a Tool Evaluation Checklist

Module 14: Types of Tools – Examples and Vendors

- Document Management tools
- Authoring Tools
- Delivery and Search Tools – Portals and Catalogs
- Content Management
- Taxonomy, Classification and Mining
- Structuring and Metadata Tools

Demonstration – Local Content and Knowledge Management

Module 15: Trends and Wrap

- Issues and Trends
- Portals, Structures, Security, Proliferation, Technology, Content
- The Future Role of the Web
- Aging Content and What to Do About it
- The Computing Grid and the Future
- The Future of Content and Knowledge
- Closing Discussion and Wrap

Exercise – Final Question and Answer Session