

iECM Technical Committee Charter

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1 Introduction

This document provides the charter for the Technical Committee of the [AIIM](http://www.aiim.org) Interoperable Enterprise Content Management (iECM) consortium (<http://www.aiim.org/standards.asp?ID=29284>). This charter defines the scope of the committee's activities and presents a list of deliverables.

2 Statement of Purpose

The IT infrastructure of an enterprise or agency today is characterized by extreme heterogeneity and further, business requirements most often require solutions that span numerous disparate IT infrastructures. Each infrastructure and, more so, each application has been built to address very specific, often localized business needs yet increasingly information must be shared between these specialized applications. The most prevalent solutions today come through customized integrations between these multiple systems. Creation and maintenance of these integrations, which generally communicate with information or content management systems through proprietary APIs, is expensive and brittle, keeping IT departments spending far more energy keeping the infrastructure running than improving the core business operations.

The Interoperable Enterprise Content Management initiative aims to aid in solving today's information sharing problems via the formalization of technologies as they are applied to the specific challenges of content management. Highly-connected, loosely-coupled cooperative and collaborative environments must support cross organizational interaction patterns including navigation, querying, retrieval, aggregation, transformation, and identification of new information relationships. All information sources require security, privacy, and accuracy. Information sharing system implementations that follow iECM practices, will require far less or no custom integration work.

3 Technical Committee Scope

The iECM Technical Committee (iECM-TC) will deliver:

1. An iECM Reference Model (iECM-RM). This abstract framework will identify and formally describe the entities needed to achieve interoperability, as well as relationships between those entities, without binding to any particular standards or protocols. The focus will be on the *interoperability* of content and content management systems and not on the inner-workings of those systems. The iECM-RM will serve to normalize those features and aspects of content and

content management so that systems adhering to the model can be leveraged with little to no customization.

The iECM-RM will include at least the following:

- a. **Services:** The operations that will be used to interact with content management systems.
 - b. **Information Models:** A specification of the information structures required to enable federated operations, such as search, retrieval, versioning and lifecycle management over information stored in multiple intra- and inter-organization ECM systems. This will include internal application and exchange of classification schema and ontologies used to express metadata about repository content and search specifications (query languages) for expressing requirements of information being sought (non exhaustive list).
 - c. **Metadata Model:** A concrete schema that allows the artifacts of the information interoperability ecosystem to be described so that components of the information sharing solution can utilize them appropriately. It will include at least the following:
 - i. Descriptions of service descriptions and bindings
 - ii. Descriptions of information models
 - iii. Descriptions of repositories
2. Best practices that present one or more instantiations of the iECM-RM where entities in the model are mapped to specific standards, technologies and/or products. The iECM consortium expects to engage in pilot activities and the deliverables described here are a likely product.
 3. A web services based standard that will provide a concrete instantiation of the appropriate portions of the iECM-RM; this is likely to map directly to the service entities of the reference model and may also address other aspects.

4 iECM Unique Value Proposition

To date, numerous standards have been developed that address *portions* of the information sharing ecosystem, however, no single standard covers all areas involved in achieving information sharing and content management system interoperability. Sound architectural principles dictate separation of concerns, and solutions to a complex problem such interoperable ECM, will require numerous, related objects and interaction patterns. Just as the World Wide Web is an information sharing infrastructure consisting of number of complementary entities (identity, interaction and data formats)¹ that are instantiated with a number of standards (URI, HTTP, HTML, XML, etc.), the information sharing infrastructure addressed with iECM will be composed of a variety of complementary entities that can then be instantiated with a variety of standards. Hence,

¹ See Architecture of the World Wide Web, Volume One; W3C Recommendation 15 December 2004; <http://www.w3.org/TR/webarch/>

the first uniquely identifying characteristic of what iECM will produce is an agreed upon abstract model that will facilitate the cooperation of relevant standards. iECM distinguishes itself from the WWW in that the former addresses content management, a superset of the predominantly content delivery capabilities of the latter. As such, iECM will model a larger set of entities and relationships that will ultimately map to a similarly expanded set of standards and technologies.

A particular characteristic of the iECM initiative is the focus on content metadata interoperability in addition to content management system interoperability. Several existing specifications standardize the operations of content management systems, without normalizing the formats or the substance of content metadata. Other specifications address standardization of metadata, without specifically applying those to the content management problem. It is assumed that participant systems will remain independent, with native vocabularies, taxonomies, and business rules. The iECM-RM will attend to both operational interoperability and informational interoperability including semantic concerns.

Implemented iECM compliant information systems will provide:

- Efficiency. Through unified, federated search; policy management; and automated business process alignment, users will be able to use disparate information more effectively across their organizations.
- Flexibility. The common access and interoperation interfaces will enable a more loosely coupled system, providing IT departments the ability to quickly add, repurpose, and re-factor information assets without moving documents or re-writing interfaces.
- Control. By providing common access, business rules and software methods can be migrated out of custom connectors, and into platform neutral meta-data and semantic representations, resulting in a single point of control for business terms/vocabularies, key words, relationships, security and behaviors.
- Automation. By enabling common access methods and augmented by SOA business process standards, advanced control policies can be overlaid onto content repositories, allowing normally stove-piped content management to be interleaved into core business processes alongside ERP, CRM, or B2B systems.

Combined, these capabilities allow Enterprise Content Management systems to interoperate according to changing business needs and functional requirements, while at the same time preserving the individual ECM system's role and purpose within the organization.