

Creighton University

COURSE: ITM 789 Enterprise Content Management and Systems Integration
TIME: Thursday, 6:00 to 9:30 PM
PLACE: BA110
INSTRUCTOR: Dr. George Royce
OFFICE: Room BA 426 and at UNO PKI Room 367. See my website for a map to UNO PKI. My site is: <http://roycesite.com/george>
OFFICE HOURS: Before or after class by appointment and regularly my hours are 5-6 PM on Friday afternoons and 9-11 Saturday mornings (check my website <http://roycesite.com/george> if times are adjusted).
PHONE and IM: Home: 216-0414 leave a voice message if I am not there. Cell phone is 312-7929 if urgent. You can also connect with Skype: gkroyce, and gtalk or my gmail. I also use Microsoft IM (george.royce@live.com). I prefer IM over email if you are comfortable with IM but email is acceptable.
E-Mail georgeroyce@creighton.com or george.royce@gmail.com

Course Description:

Companies are dealing with an explosion of content they must manage. Years ago paper documents, phone calls, voice mails and emails were the primary document types in many companies. Today businesses use rich content websites including Flash and Silverlight based content, wikis, blogs, instant messaging, text messaging and even facilities like Twitter as forms of communications and knowledge sharing. Multimedia such as digital images, videos and recorded Webex like sessions are common place. Engineering firms also have CAD documents. The medical field has a variety of medical documents images including X-Rays, X-ray computed tomography (CT), magnetic resonance imaging (MRI), PET and many more. The medical field is being challenged to move to more effective electronic medical records management. Documents and images must all be effectively managed as records or assets of the enterprise throughout their lifecycle. This records management is being mandated by a number of laws coming from the organizations like the SEC and recent regulations like Sarbanes-Oxley, HIPAA and the HITECH Act.

The goal of this course is to give students skills and conceptual foundation necessary to manage various forms of content within an enterprise. Students will learn and use models and processes to identify and evaluate various forms and content within an enterprise and determine the best processes and technologies to manage this content.

Students will receive hands on experience with a variety of content systems including Microsoft SharePoint, blogs, and wikis to better understand the capabilities and limitations of these systems. Students will also review case studies to understand best practices in effectively managing many different document and media types and will have a project in which they will recommend the processes and technology needed to effectively manage documents within an organization. Students will develop the plan to carry out the project along with the CBA, and the change management/communication plan for the project.

Prerequisites

ITM 731

Objectives:

After taking this course, a student will, among other things, be able to:

1. Identify various forms of content within the enterprise and appropriate systems that can be used to manage this content.
2. Perform a content audit within a company.
3. Develop as-is and to-be business process models for the management of all forms of content within a company. Create the most efficient model for the to-be process using workflow modeling principles.
4. Create appropriate measures of success for a pilot of a content management or collaboration technology.
5. Describe the impact of XML and the emerging content management metadata standards and how this will impact the creation and management of the life-cycle of content over time.
6. Create and customize a Microsoft SharePoint site to effectively manage the life cycle of documents in a number of businesses. This requires little if any programming knowledge. If you can develop a spreadsheet you can do this.
7. Develop a project proposal, project plan, cost/benefit analysis and total cost of ownership model for a document and/or content management system. Create the change management / communication management plan for this project.

Text:

Much of the information and research will be done on the internet and using online information databases. However, students are encouraged to acquire:

Implementing Electronic Document and Record Management Systems by Azad Adam. ISBN-13 is 978-0-8493-8059-4

Optional:

Microsoft Office SharePoint Server 2007 Best Practices by Ben Curry and Bill English, 2008.

Grading:

Activity	Date Due	Points
Class discussion, participation and virtual presentations	May 6 th	100
Assignment 1 – Enterprise Content Management – Case study –Check out HBR for Case studies as well as other sources	March 4 th	110
Assignment 2 – Team Blog/Discussion Board and Commentary on Enterprise Content Management	April 15 th	100
Assignment 3 – XML, Eforms, Mashup and Content Portal	May 6 th	120
Assignment 4 –Enterprise Content Management Project	April 29 th	170
1st Quarter Exam	March 25 th	200
2 nd Quarter Exam	May 6 th	200
Total		1000

Virtual Presentations

Due to the limited amount of class time and the large number of topics to cover, you will be asked to listen to one or more “virtual presentations” which include slides with audio in a Flash presentation on my website. You will also be asked to answer questions about these presentations in Blueline.

Class Policies:

Late Assignments: 2% deduction per day late. Assignments will not be accepted after a week late.

Cheating – If you copy another person's work in whole or in part, you will receive no credit for the assignment. If you allow your work to be copied by another person, you will receive no credit for the assignment. Two such incidents can result in a failing grade for the course.

Class Outline:

Class 1 February 11th

Topics: Introductions / Review Class Policy and Assignments / Introduction to Enterprise Content Management

Class Activities:

1. Fill out Student Background – Assignment 0
2. Introduction to ECM
3. Informal content inventory with ranking of importance – we will do more with this. To determine records disposition and management
4. Start posting answers to the first few questions on ECM and collaboration?
5. Begin discussion of HTML and XML
6. How to do a podcast and place it on a site with audacity – give them a sample podcast (later we will talk about how to subscribe to a podcast using RSS)
7. Discuss and demo development of a website – handout ID's and passwords for these sites. – you will be posting your audio file, PowerPoint and paper for assignment 1 on this site.
8. Continue discussion of HTML and XML
9. [Get accounts on Google docs and Microsoft live](#)

Class 2 February 18th

Topics: Value of HTML/XML, Rich Client Services, E-Forms

Readings Covered In This Class: Adam Chapters 1 and 2

Class Activities:

1. Complete discussion of HTML and XML
2. ACTIVITY: Create the XML for the activity and submit either tonight or before the first test.
3. Content management and ECM's systems
4. Introduction to Document Portals and SharePoint
5. Web Services and e-forms
6. Discuss posted questions and answers to assignment 2

Class 3 February 25th

Topics: Document and Content Audit, Document and Content Systems, SharePoint Part 2.

Readings Covered In This Class: Adam Chapters 3

Class Activities:

1. Complete Eforms Exercise
2. Complete SharePoint Exercises
3. Document and Audits
4. Discuss posted questions and answers to assignment 2

Class 4 March 4th

Topics: Impact of Rich Media and Collaboration Technology on Enterprise Content and Records Management

Readings Covered In This Class: Adam Chapters 4

Class Activities:

1. RSS and Mashup
2. Email, IM, Rich Media and Collaboration
3. Enterprise Records management
4. Student Presentations for Assignment 1
5. Discuss posted questions and answers to assignment 2

Class Activities: Impact of Rich Media and Collaboration Technology on Enterprise Content and Records Management, Student Presentations from Assignment 1.

Assignment 1 Due – Case Study

Class Activities:

1. E-Mail, IM, Text Messages, Rich Media and Collaboration
2. Enterprise Records management
3. Google Docs for Collaboration
4. Student Presentations for Assignment 1
5. Discuss posted questions and answers to assignment 2

No Class March 12th – Spring Break

Class 5 March 18th

Topics: Search Engines, E-Forms, Total Cost of Ownership

Readings Covered In This Class: Adam Chapters 5, 13

Class Activities:

1. Enterprise Search
2. Total Cost of Ownership and Cost Benefit Analysis
3. RSS and Mashups
4. Blogs, Wikis and Social Media in Companies
5. Discuss posted questions and answers to assignment 2

Class 6 March 25th

Topics: Integrating content systems into line of business applications, Corporate Compliance, Enterprise Content Management Projects including building and Scoring and RFP

Readings Covered In This Class: Adam Chapters 14-17

Class Activities:

1. Building and Scoring Request for Proposals
2. Total Cost of Ownership and Cost Benefit Analysis
3. First Test

No Class April 1st – Easter

Class 7 April 8th

Topics: Email, IM and Text Management, Multimedia Content

Readings Covered In This Class: Adam Chapters 8, 9

Class Activities:

1. Agile Project Management
2. Enterprise Content Management Strategy
3. Document Centric Workflow overview and Activities
4. Software as a Service Model for Document and Content Management
5. Discuss posted questions and answers to assignment 2

Class 8 April 15th

Topics: Knowledge Management, Software as a Service Document Management Models, Google Docs and Microsoft's Answer.

Readings Covered In This Class: Adam Chapters 10-12

Assignment 2 Due – Blog

Class Activities:

1. Microsoft Live Activity
2. People Change Management in ECM Projects
3. Content Enabled Business Applications
4. ECM People Change Management Activity

Class 9 April 22nd

Topics: Change Management, Content Audit, Mobile Devices and Documents – Podcasts, Videos, E-Books, content designed for Mobile phones.

Readings Covered In This Class: Adam Chapters 4

Class Activities:

1. Medical Records Management
2. Enterprise Content Compliance and Security
3. Monitoring content of all types inside and outside the company to reduce company risk
4. Knowledge Management

Class 10 April 29th

Topics: Medical Record Management, Compliance, Security and Privacy of Documents

Assignment 4 Due – Class project

Class Activities:

1. Student Class Evaluation
2. Content and Mobile Applications
3. E-Books and E-Book readers and how they are changing the nature of documents

Class 11 May 6th

Topics: Present Projects and Final Exam

Assignment 3 Due – All Exercises Due

1. Student Presentations for Assignment 4
2. Closed book part of Test
3. Introduce the Take Home test