

Get More from Microsoft SharePoint with Oracle Fusion Middleware

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This white paper highlights capabilities Oracle Fusion Middleware brings to Microsoft SharePoint environments. It is not intended to be a comparison between SharePoint environments and any Oracle products or an endorsement of SharePoint as an enterprise content management tool or any of SharePoint's content management or collaboration technologies.

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EXECUTIVE OVERVIEW

As organizations rollout Microsoft SharePoint, a new ecosystem of content sharing, collaboration, and project libraries is introduced. This infrastructure is sometimes managed centrally by IT organizations, but more frequently it is a viral rollout based on departmental and project teams standing up SharePoint instances to provide spaces and places for local content.

While this may provide benefits to specific teams, it also creates unique new challenges to IT organizations looking to provide aggregated access to content, secure corporate intellectual property, comply with regulatory or legal policies, and rollout enterprise search and content management tools across an increasingly diverse and distributed set of content stores and document owners.

Oracle Fusion Middleware includes a unique and broad set of capabilities that help IT organizations get control of SharePoint deployments while enhancing the content experience for end users.

INTRODUCTION

SharePoint is a set of Windows-based products and technologies that provide collaboration services, document libraries, and a .NET portal environment. SharePoint is often rolled out in a de-centralized model that spans multiple servers, repositories, and Microsoft SQL Server databases. While this federated infrastructure might allow end users to quickly rollout new SharePoint instances, it poses challenges for IT departments who are responsible for managing and maintaining an enterprise infrastructure.

Oracle Fusion Middleware provides an extensive set of tools for enhancing and managing SharePoint. These tools help organizations

- Share content once the creation phase of the lifecycle is complete by publishing content to an enterprise content management (ECM) system for enterprise access and distribution
- Comply with industry or government regulations and policies with centralized policy management across distributed SharePoint environments

- Implement in-place records and retention management—including legal holds—across SharePoint instances
- Archive content from SharePoint into a single, secure, online repository
- Securely search across multiple libraries and instances
- Implement information security across and beyond SharePoint environments—including securing documents on laptops, flash drives, and within systems beyond the firewall
- Integrate SharePoint content within enterprise and composite applications

ORACLE FUSION MIDDLEWARE

Oracle Fusion Middleware is an enterprise platform for publishing information and enabling dynamic access to that information through a variety of means. With Oracle Fusion Middleware, organizations can

- Deploy content across multiple operating systems.
- Securely share content across different domains, networks, and security systems.
- Secure documents with a specific security setting at the document level so they can be shared across multiple applications—and even be used outside the organization—with the security still intact.
- Enable content to be published in multiple formats for multiple purposes including HTML, XML, PDF, and native formats.
- Link content in multiple ways so it can be reused in different contexts; this enables one source of information to have many uses and reduces the need to recreate information for different uses that results in difficult updates when information changes.
- Enable content to be used directly in applications; images or electronic documents can be accessed directly from industry-leading accounting, enterprise resource planning, and customer relationship management systems through pre-built integrations.
- Provide a service-oriented architecture for content so that content services can be embedded and reused.

PUBLISH CONTENT FROM SHAREPOINT TO THE ENTERPRISE

As organizations collaborate on a project or departmental level within SharePoint they generate a mix of content—a small percentage of which has long term benefit to the organization or company as a whole. Much of the project-centric content, such as meeting minutes, draft documents, and organizational collateral is of little benefit beyond the project team members and users of the SharePoint library. The final project deliverables—reports, project papers, product plans, process

High value content should be promoted to an ECM system for access throughout the entire organization.

documents, and others—are needed by the organization, not just the project team. These high-value final documents need to be published for access throughout the organization in order to be accessed and utilized by authorized people, published to Web sites, or viewed within the context of enterprise applications.

Promote to Enterprise

Users can identify and promote content from within SharePoint to Oracle Universal Content Management for broader consumption of the content across the organization.

Oracle Universal Content Management enables SharePoint users to easily identify and promote enterprise content from within SharePoint workspaces to be published for broader consumption. Published content can be consumed via enterprise search, the ECM system, or via other systems, portals, or applications.

Oracle Universal Content Management 10g R3 includes Web parts for SharePoint as part of the standard product feature set. The Web parts run within the SharePoint server and provide the ability to move content between local, departmental, or project-based SharePoint spaces and the ECM system, Oracle Universal Content Management. This movement of content is done via the standard SharePoint menu system for content in document libraries.

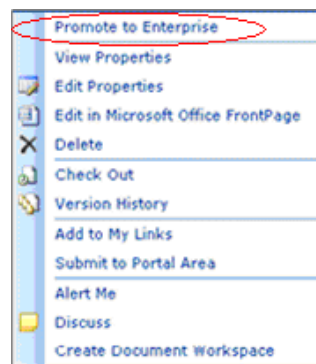


Figure 1. Oracle Universal Content Management 10g R3 Web Parts promote content to the enterprise from within SharePoint

EXPOSE ENTERPRISE CONTENT AND SERVICES IN SHAREPOINT

As content is created in the ECM system or promoted to the enterprise via SharePoint, users will need to have access to the information from other SharePoint instances. The ability to access both local project libraries in addition to enterprise content from single interface is critical to the adoption of a shared project/enterprise model.

Leveraging Unified Enterprise Content Management

The Oracle Universal Content Management 10g R3 Web parts provide the ability to locate, retrieve, and act upon enterprise content from within the SharePoint portal environment. The Web parts include the ability to

- Search the Oracle Universal Content Management system
- Browse the enterprise folder structure

- Check new content directly into Oracle Universal Content Management
- View enterprise content metadata
- Download enterprise assets in Web-viewable (often PDF), native, or HTML formats
- Access saved queries and URLs
- View and act on enterprise content workflow assignments
- Work with enterprise content subscriptions

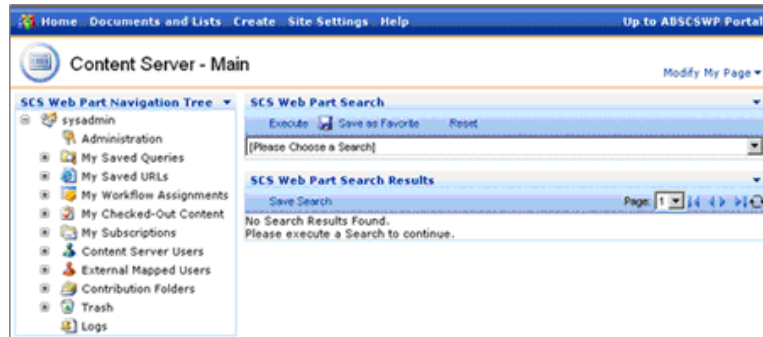


Figure 2. Accessing enterprise content and services from SharePoint

Oracle Universal Content Management Web parts enable SharePoint users to leverage a complete set of unified ECM functionality such as digital asset management, records management, Web content management, application integration, BPEL processing, and content conversion.

Content in the Oracle Universal Content Management system leverages the complete unified ECM capabilities that Oracle provides—including digital asset management conversions, records management policies, automatic conversion to branded Web formats, inclusion in Web content management processes, content tracking and auditing, and transformation to document formats such as PDF and XML. All items in the enterprise system are subject to enterprise class security and can be leveraged in the ECM distribution capabilities, including Web publishing, BPEL processing, and application integrations.

Organizations using SharePoint as an application front-end can utilize Oracle Fusion Middleware enterprise services to enhance custom built Web parts. The service oriented architecture design of Oracle Fusion Middleware enables developers to easily consume enterprise capabilities directly from within the Microsoft Visual Studio development environment. These services include content transformation services, the ability to securely search multiple repositories and SharePoint libraries, and business process automation and process management that includes content stored and managed in SharePoint.

CONTROL THE CONTENT IN SHAREPOINT

As content moves through its lifecycle in SharePoint, it often becomes old, outdated, or inactive. This leads to a number of content lifecycle issues

- Outdated or duplicate items make business users unproductive since they spend time searching through unnecessary or irrelevant information

- SharePoint sites often go fallow through lack of use, only to be found at some future time when the information is out-of-date and misleading
- Clutter drives up storage costs as duplicate or useless information is stored, resulting in an organization not knowing which content to eliminate
- Unmanaged content puts enterprises at risk during litigation, and significantly increases electronic discovery costs due to the amount of content that must be collected, processed and reviewed

In-Place Retention Management

As the size and quantity of SharePoint deployments grow within an organization, tools are needed by IT groups to manage the lifecycle of content that is typically stored in disparate repositories. Oracle Fusion Middleware effectively manages content across disparate repositories by providing a centrally administered and managed, policy-driven approach to records and retention management that spans multiple SharePoint instances.

Often SharePoint libraries and spaces are created for a project and then abandoned once that project is completed. Oracle Fusion Middleware can establish centralized policies for managing the content lifecycle of documents within SharePoint and other repositories. Retention policies can be driven by a time frame, an event (such as a project marked as completed), new revisions being created, or the amount of user activity.

This allows organizations to automate the retention process through interactive workflows as part of the retention schedule policies. Content owners, project owners, and other critical members of the content lifecycle can participate in determining the appropriate action to take on documents, sites, and libraries via e-mail-based workflows.

Records Management for SharePoint

Oracle Fusion Middleware provides a centrally administered, adapter-based United States Department of Defense (D.O.D.) 5015 Chapter 2 and Chapter 4 certified records management system. It enables organizations to manage electronic and physical records, place holds, and perform dispositions regardless of where the records reside. Oracle's adapters for SharePoint allow systematic discovery of records or non-records based on metadata exposed by SharePoint repository. In addition, discovery searches can be run across multiple SharePoint instances via the single interface that can be configured for different user profiles such as legal officer, compliance officer, or record managers.

Documents identified as records can be managed in-place in the SharePoint 2007 repository so that users might work with content where it is stored, and no new training is required for users on new procedures and systems. In case of a SharePoint 2003 repository, records are moved via the defined policy to the appropriate enterprise records repository that then can perform a D.O.D 5015.2

certified legal hold. This can be the Oracle Universal Records Management repository itself if desired. A stub is placed in the SharePoint 2003 repository that will automatically redirect requests for the document to the appropriate records system, providing users with the ability to continue to find and view content that has become an enterprise record.

Deleting documents is easy. Knowing which documents to delete is the hard part. Oracle can provide the right tools to identify document retention policies when the content is created.

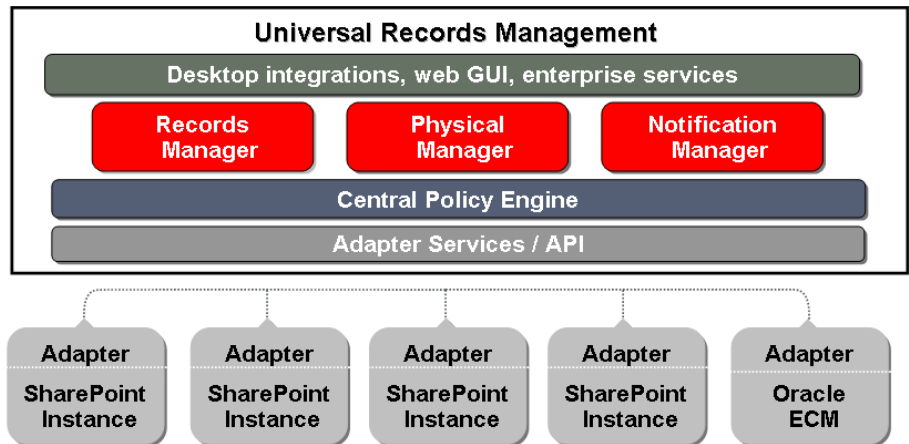


Figure 3. Oracle Universal Records Management architecture

Online Archiving

Another aspect to consider as projects are completed or as SharePoint sites are abandoned over time is online archiving—a solution that provides a suitable, more efficient storage system that keeps information findable and accessible when needed, yet out of the way for everyday work.

An effective option for archiving completed project sites is to apply the retention management capabilities of Oracle Fusion Middleware to your SharePoint sites, libraries, or documents. Organizations can set parameters where SharePoint content can be archived, aiding in more effective storage management, enabling project site reuse, and eliminating the risk of knowledge workers accessing old, out-of-date content.

In the event of electronic discovery or litigation, organizations will be able to comply with regulations and simply access the archived, relevant content in order to apply records holds and produce the content when required.

SECURE CONTENT WITHIN AND BEYOND SHAREPOINT

As content moves from SharePoint libraries to users desktops, or perhaps even beyond the enterprise to partners or customers, organizations typically lose control of the content. Content that was secure in one instance of SharePoint might be e-mailed to different users or checked into another SharePoint that might have entirely different security policies. SharePoint creates information security silos,

making it impossible to manage the security of those assets (especially non-Microsoft assets) once they leave SharePoint.

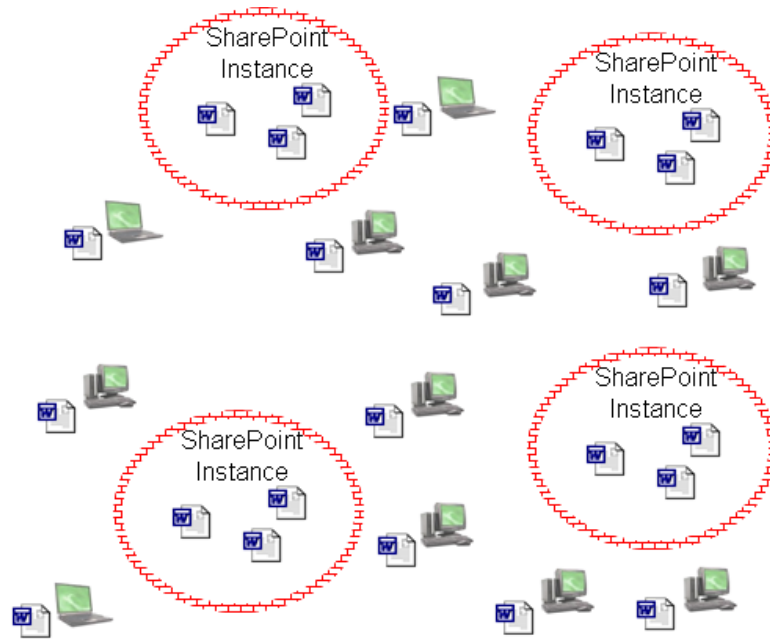


Figure 4. Information security silos with SharePoint

Information Rights Management

A content item that is sealed with Oracle Information Rights Management is secured with a layer of encryption that prevents unauthorized users from accessing the information.

Oracle Information Rights Management enables content to be sealed based on enterprise information management policies, such as “Company Confidential” or “Top Secret”. A sealed document is itself secured, with a layer of encryption placed around the document that prevents it from being opened or accessed in any way by users who are not authorized. This frees content to move between SharePoint libraries, through e-mail, onto laptops and desktop computers, and even to offline media such as flash drives without ever losing control of the security of the document.

An Oracle Information Rights Management server centrally controls rights to sealed documents, with users and groups provided by identity management systems, such as Microsoft Active Directory. Users can be granted offline access to documents—assuring they can work seamlessly with sealed documents anywhere while also maintaining information security and providing an access audit trail.



Figure 5. Oracle Information Rights Management

INTERACT WITH DISPARATE SHAREPOINT CONTENT IN THE CONTEXT OF EVERYDAY TASKS AND PROJECTS

A typical information worker in the enterprise today has the incredible challenge of making effective decisions with limited context. To find all relevant information to complete a task, he or she must swivel between multiple applications and remember the relevance and linkages. Information in SharePoint instances scattered throughout an enterprise compounds the information worker's challenge.

To enable businesses to bring complete context to users' daily work tasks, organizations should consider creating highly productive user work environments that take advantage of service-oriented architectures. Oracle WebCenter does just that by combining the standards-based, declarative development of JavaServer Faces, the flexibility and power of portlets and runtime customization, and a set of integrated Web 2.0 services into a new generation of context-centric, composite applications. Using Oracle WebCenter capabilities, you can build applications that allow users to interact with instant messengers, voice over IP, content, and other collaborative services such as SharePoint directly within the application.

To address the information worker challenge of swiveling between applications and manually creating linkages and context, Oracle WebCenter provides standards-based integrations with SharePoint and many other content-centric applications to bring this disparate information to an information worker's business task or process, in-context.

Oracle WebCenter addresses the information worker challenge when dealing with scattered and siloed SharePoint content.

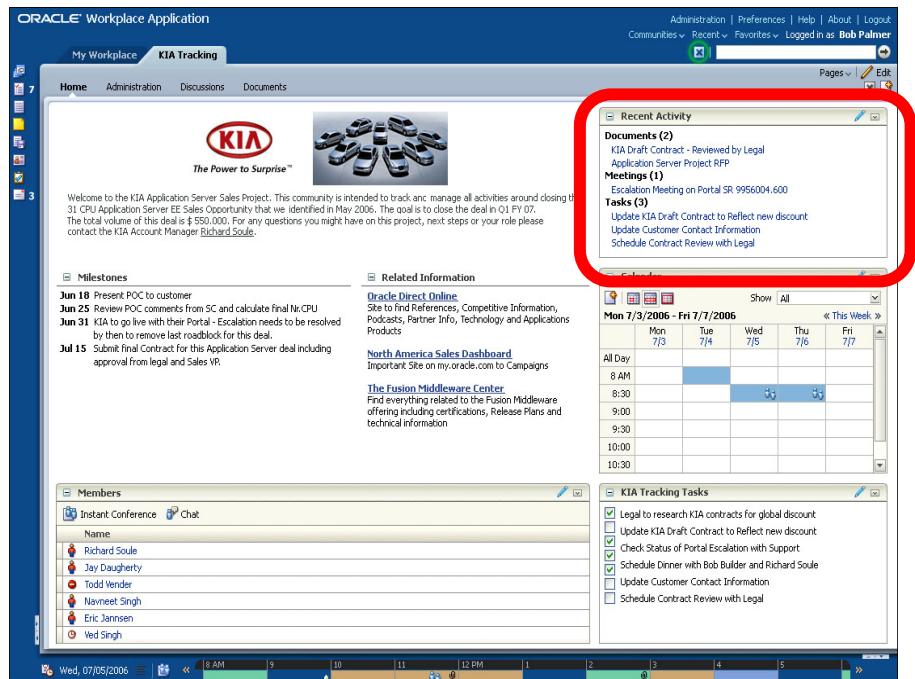


Figure 6. Oracle WebCenter brings complete context to users.

Oracle WebCenter leverages Java Content Repository (JCR) standard to connect to SharePoint and provides an easy alternative to pure coding against JCR APIs for content integration. Using data controls (as specified by JSR 227), Oracle WebCenter hides the complexity of the JCR standard behind this generic framework, making integration simply a matter of dragging and dropping the relevant data controls into your application. The SharePoint adapter—written to the JCR API standard—provides access to the underlying repository.

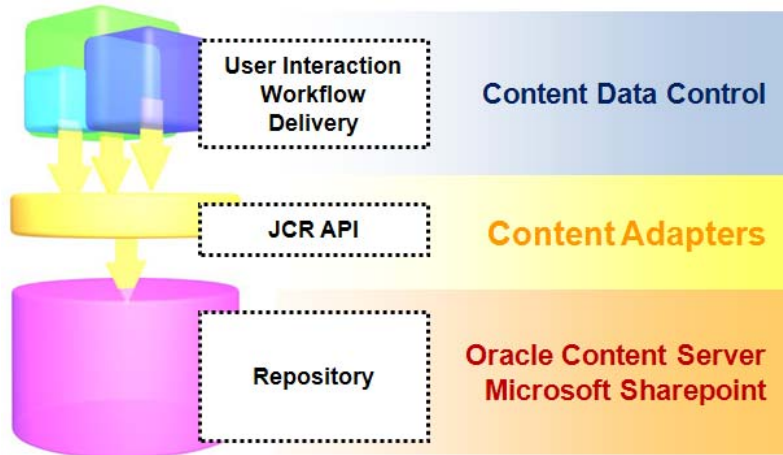


Figure 7. JCR content adapters in Oracle WebCenter

Organizations can more effectively manage SharePoint implementations by leveraging the robust and diverse set of capabilities provided by Oracle Fusion Middleware.

CONCLUSION

As organizations' content ecosystems grow—and as they continue to add SharePoint content and project libraries to the mix—the complexity of effectively managing these ecosystems increases. IT organizations will still have to face the challenges of providing aggregated access to content, securing corporate intellectual property, complying with regulatory or legal policies, and rolling out enterprise search and content management tools across an increasingly diverse and distributed set of content stores and document owners. By utilizing Oracle Fusion Middleware's robust set of capabilities, IT departments can more effectively manage their SharePoint implementation while enabling an enhanced content experience for their end users.



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