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| NZ Govt Logo | [SaaS Product Name] SaaS Framework: SaaS: Content Services Software – Tier 2: Content Services | Company logo |

**Content Services Software**

Content Services Software are "integrated platforms that provide content-focused services, repositories, APIs, solutions and business processing tools to support digital business and transformation. They often include a set of services and microservices, embodied as an integrated product suite and applications that share common APIs and repositories, to exploit diverse content types and to serve multiple constituencies and numerous use cases across an organization" (Gartner, 2018)

**Overview**

[put overview here – a paragraph on what the product or service does]

**Service Contact Details**

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| --- | --- |
| Contact Name: |  |
| Contact Number: |  |
| Contact Email: |  |

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| --- | --- | --- | --- |
| No of Subscribed Users: |  | Average Rate: |  |
| Supplier: |  | Demonstration available: | [Yes/No] |
| Tier Rating: |  | Free trial: | [Yes/No] |

**Choose Your Plan**

|  |  |  |
| --- | --- | --- |
| **[Name of Plan 1]**  **Features**  **Subscription Type**  **Price** |  | **[Name of Plan 2]**  **Features**  **Subscription Type**  **Price** |

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| **[Name of Plan 3]**  **Features**  **Subscription Type**  **Price** |  | **[Name of Plan 4]**  **Features**  **Subscription Type**  **Price** |

**Service Features**

**Administration** (tick all that apply):

Audit administration (the ability to manage the audit mechanism, including levels of audit applied, purge and access rules)

Client management (services to manage and secure the client user interface components, including: device lock, encryption, remote wipe, etc.)

Device administration (the ability to manage devices and interfaces that connect to the system)

Key management (the ability for organisations to manage encryption keys independently of the system vendor (of particular relevance for SaaS based solutions)

Policy administration (the ability to define and manage the policies present in the system, in particular retention/ records policies and security policies (ACLs)

Rules administration (the ability to define and manage rules present in the system, e.g. notification rules, business process rules, classification rules etc.)

Scheduling administration (the ability to manage the execution of capability within the system on a scheduled basis, e.g. batch processing)

User administration (the ability to manage users, groups and roles present in the system)

**Analytics and Reporting** (tick all that apply):

Content analytics (services providing interactive visualisations which surface insights extracted from content and metadata)

Natural language generation (the creation of contextual narrative from structured data sets)

Process analytics (services providing interactive visualisations which surface insights extracted from the execution of business processes)

Reporting (the ability to be able to design and consume reports based on system activity and data)

Social analytics (services providing interactive visualisations which surface insights regarding social interactions between users of the system)

User analytics (services providing interactive visualisations which describe how the system is being used based on user actions)

**Business Application Enablement** (tick all that apply):

Line of business (LOB) integration (provision of direct integrations into popular line of business applications, e.g. ERP, CRM suites)

Native integration (provision of APIs that communicate directly with the systems underlying technology components, e.g. Java or .NET)

Web services integration (provision of web services-based APIs (e.g. REST/SOAP) to access system functions)

**Capture** (tick all that apply):

Email capture (automated, capture, ingestion and processing of content via an email channel)

Fax capture (automated, capture, ingestion and processing of content via a fax channel)

IM capture (automated, capture, ingestion and processing of content via an instant messaging channel)

Mobile capture (capture and upload from a mobile device's camera)

Web services capture (automated, capture, ingestion and processing of content via a web services channel)

Recognition (the recognition and transformation of information into data in a digital form from physical images. Includes OCR, ICR, OMR, barcodes etc.)

Scan (the capture of and digitisation of content from a physical form (i.e. paper) often used in conjunction with recognition services)

**Collaboration** (tick all that apply):

Comments (ability to create and participate in a comments thread and relate to content)

Notes (ability to take notes, associate with content and share with colleagues)

Social tags and ratings (ability to rate, like or indicate content as a favourite)

Team sites (ability to provision sites for team-based content work and collaboration)

UCC integration (Integration into unified communication clients and tools (e.g. IM presence))

Workspace (ability to create, edit, maintain and participate in workspaces dedicated and tailored to a particular business objective)

**Content Management** (tick all that apply):

Annotation (enabling users to annotate content with comments, observations and visualisations without affecting the original, underlying content)

Authoring (ability to initiate and participate in the authoring of content)

Bulk ingestion (ability to efficiently, from a system and end user perspective, import content in large quantities)

Check in / Check out (ensuring that where concurrent modification of an information asset is not permissible that there is a mechanism for users to lock editing of content until their work is complete)

Compound document (ability to create sets of individual documents that can be managed and retrieved as a single item)

Concurrent authoring (enables users to collaborate concurrently, in real time, on the same content)

Content viewers (enables the viewing of content and thumbnails without the need to download the content onto the device)

File management (ability to create, import, edit and download content)

Renditioning (ability to create multiple formats of an item of content (e.g. a PDF rendition of a word document))

Rich media (the optimisation of the management of rich media such as audio or video. Includes storage, content analysis and viewer capabilities)

Templates (provision of templates used in the authoring process)

Translation (enable the automated translation and localization of content)

Versioning (ability to create multiple versions of content and maintain a version history)

Ability to manage Māori language (Te Reo) and associated macrons in content, search and metadata

**Content Security** (tick all that apply):

Automated content cleansing (capabilities which automate the cleansing of content based on rules, e.g. the removal of obsolete metadata from files and objects and deduplication)

Data loss protection (ability to automatically detect sensitive data within the system (based on rules) and then flagging it or executing policies to further protect)

Digital rights management (ability to define protection of information assets when they are taken outside of the repository, e.g. the inability to read a document in a word processor unless you have sufficient access to it)

Download restriction (ability to restrict the download of content, e.g. online viewing only)

Encryption at rest (the encryption of information held within the system)

Redaction (ability to manually and/or automatically mark passages of text as unreadable)

Watermarking (ability to apply watermarks to content that indicate a form of status that has been applied to the content, e.g. a protective marking)

**Information Governance** (tick all that apply):

Global policy management (ability to define and manage the legislation and regulations that drive records management requirements and how they apply to actual policies implemented in the system)

Immutability (ability to ensure that content cannot be altered when a retention or records rule is applied)

Legal hold (ability to define a hold which can be placed on multiple content items and will restrict the disposition of such content until the hold is remove)

Physical records (capability that allows physical items to be managed as records, including the ability to track the movement of assets)

Records (ability to define a set of advanced, formal records functions which can be applied to content including file plans, in-place records management, and record parts)

Retention (ability to define and execute retention rules which trigger the disposition or archiving of content)

**Metadata and Classification** (tick all that apply):

Machine learning based classification (ability to define and train machine learning algorithms to detect patterns in content and metadata and automatically apply classifications)

Metadata model (ability to define a metadata model made up of different data formats and applied to different types of information. This model will be exposed to end users of the system to utilise in storage and retrieval transactions)

Metadata taxonomy (ability to define, apply, navigate and search metadata structures, hierarchies and relationships)

Rule based classification (ability to define and execute rules that will automatically add metadata (including tags) to content when the rules are triggered)

Security classification (ability to classify, with metadata, the level of security that should be applied to content, e.g. protective markings)

Tagging (ability to be able to add tags to content. Tags are a repeating form of metadata which can be freeform or based on)

**Productivity** (tick all that apply):

File sharing (ability to share individual files internally and externally)

File synchronisation and streaming (ability to synchronise (create, update, delete) individual files on a local device with a location in the system or provide access to cloud-based content via file streaming (similar to network share access))

File transfer (ability to transfer large files and large sets of files to the system with features for pausing and resuming in the event of failure)

Folder sharing (ability to share groups of files in a folder internally and externally)

Folder synchronisation (ability to synchronise (create, update, delete) groups of files contained in a folder on a local device with a location in the system)

Productivity suite client integration (integration into productivity (office and email) suites and digital content creation/editing tools (image capture, video, or editors), and devices)

Task management (ability for individuals and teams to set, track and manage content related tasks)

**Search** (tick all that apply):

Enterprise search (capabilities to search remote repositories for content and metadata, utilising a single index which surfaces results in a single comparable set)

Federated search (capabilities to search remote repositories for content and metadata utilising remote indexes/search mechanisms, Results may not be in a single easily comparable set)

Insight engine (advanced search capabilities that pro-actively return data (not just document containers) based on user context and queries. May utilise advanced data interrogation mechanisms such as machine learning or graphs)

Media search (capabilities to search for rich media (images, audio video) based on automated tagging of such assets)

Native search (capabilities to search the local repository for content and metadata. Includes basic search capabilities (e.g. a google like experience) and advanced capabilities such as auto generated facets)

Natural language querying (natural language Q&A search)

Search visualisation (visualisation of search results using various analytical models (such as knowledge maps) in order to highlight relationships between results)

**Workflow** (tick all that apply):

Business process management (services to design, configure, deploy and execute content centric complex business processes)

Forms (services to design, configure, deploy and forms for usage in processes, workflows and functions)

Notification (ability to define, trigger and respond to notifications and alerts based on repository events (e.g. the update of content))

Process simulation (ability to simulate process usage to prototype solutions and test the thresholds of process-based solutions)

Rules (services to design, configure, deploy and execute rules in processes, workflows and functions)

Workflow (services to design, configure, deploy and execute document centric processes including content routing, approval and the management of exceptions)

Case management (ability to manage cases to achieve resolution of a problem, claim, request, proposal, development or other complex activity)

**Delivery and Publishing** (tick all that apply):

Multichannel publishing (ability to publish content to configured output channels)

Publishing rollback (ability to roll back the publication of content to a previous state)

Publication scheduling (ability to manage and execute a schedule for the publication of content)

Publication approval (a process specifically designed for managing the approval of content to be published)

**Platform Features** (tick all that apply):

Adaptive client (A common user interface that adapts to optimise the experience for common form factors and/or personas and roles)

Authentication (services that support authentication capabilities including integrations with directory services (LDAP) and support for authentication protocols (SAML, OAuth, Kerberos))

Browser based client (a client that runs in a browse)

CMIS integration (provision of a CMIS API which will allow external clients to utilise system functions through CMIS calls)

Data management (ability to manage and execute polices that concern the storage of content and metadata within the system. This includes storage definition, geo location (in the case of cloud services), backup and restore policies and more.)

Desktop client (a client that is installed onto a desktop workstation)

High availability (ability to design and operate an architecture that includes redundancy, resilience and the ability to scale up or down to meet user demand. In cloud platforms this should be reflected in SLAs)

Mobile client (a dedicated mobile application)

Navigation (capabilities to navigate the repository via information containers (i.e. folders or metadata views))

Repository (a fundamental service which stores and provide access to content and metadata)

**System Security** (tick all that apply):

Access control (the enforcement of defined access rights and permissions for individual users, groups and roles to information assets within the system.)

Audit (the tracking and reporting of transactions that occur within the system in a robust form that cannot be tampered with or altered)