

# **Key Components: Deploying an ECM**

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# Purpose and Discussion Topics

- ▶ Common Challenges
- ▶ Key Success Factors
- ▶ Sample Deployments

# Many Organizations and Agencies face the same common challenges with institutional knowledge and information

## Common Challenges

### People

- ▶ People need to find information/content quickly
- ▶ Aging / retiring workforce
- ▶ Physical and geographically dispersed workforce
- ▶ New generations of staff with new approaches to learning

### Process

- ▶ Non-standard or centralized processes
- ▶ Manual hand-offs
- ▶ Outdated paper-based guidebooks or manuals
- ▶ Lack of accountability

### Technology

- ▶ Incompatible legacy systems
- ▶ New technology and security mandates
- ▶ Fragmented content/knowledge repositories
- ▶ Lack of content/knowledge to leverage existing systems

### Policies

- ▶ Demands for paperless procedures
- ▶ Email Management
- ▶ Trends in telework and flexible work options
- ▶ DoD 5015.2, ISO 9000, Government Paper Elimination Act (GPEA)

# There are several key success factors when deploying an ECM

## ▶ **Establish strong leadership and buy-in/advocacy**

- Need leadership support from start to finish
- Need to identify and work closely with advocacy group to encourage and support usage
- Need to ensure IT is involved from the beginning
- Gain trust of end users from beginning and leverage their feedback throughout the process

## ▶ **Establish Policy and Guidelines**

- Management/Leadership must use the system and define usage
- Users are compelled to use the system/process by policy/management
- Penalties for not complying

## ▶ **Establish vision, requirements and deployment strategy**

- Understand your needs- strategy must be business driven
- Define shared requirements and determine unique requirements of each department/unit/component
- Establish quick wins that highlight usability, process improvement, etc

## ▶ **Improve business processes if needed**

- A system built on broken processes and business rules will not succeed
- Analyze current business processes and understand upcoming changes that may require updating /modifying the process

## ▶ **Pick the right tool**

- Select a tool based on your requirements not cost or popularity

# Vertical Applications

- ▶ **Vertical applications have a higher success rate**

- Feature a narrowly defined scope and typically tighter integration with the ECMS platform
- Users are often unaware they are using components of ECMS
- Complex tasks such a records determination or versioning are often performed automatically
- Limited scope of ECMS functionality leveraged

- ▶ **Examples:**

- EPA eDocket: Used Documentum to provide security, full text searching, versioning and auditing while hiding Documentum behind a custom JSP interface. Userswereunaware they are using components of ECMS
- US Army Environmental Center READ: Custom search and retrieval tool for researching environmental records. Custom submission tool for new records.
- Select CoCOMS and Navy components- provide security, auditing, searching leveraging HP TRIM and Sharepoint. Users are often unaware that TRIM is providing components of ECMS

**When users understand the system and functionality they often respond better and system usage increases**

# Customized out of the box COTs ECMS

## ▶ Customized out of the box COTs ECMS client applications

- Limits the vast array of ECMS functionality available to end users to only functions they will use
- Tailored to the enterprise's terminology and use cases
- Reduces learning curve and support costs
- Costly development and may make upgrades difficult
- Still requires significant management buy-in
- Requires consistent coordination with IT

## ▶ Examples:

- US Air Force General Counsel- Customized Tasker Management Application leveraging HP TRIM and .Net- enhancements to increase user adoption
- US Army Environmental Center MyDocs: Customized DocumentumWebtop client with limited functionality and usability enhancements
- DOE OCRWM ECMS Pilot: Featured many DocumentumWebtop enhancements to improve user adoption and support costs

**There are benefits to customizing out of the box COTs, however user participation during development is critical**

## For More Information

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