

What is EDM?

- ✍ **Management of electronic documents, including text documents, spreadsheets, graphics, graphs and charts, email, scanned images, html documents**
- ✍ **Managing the life cycle of documents: creating, storing, retrieving, archiving/disposal**
- ✍ **Preservation of corporate memory**

Paper-based system

- ✍ Increasing number of electronic documents
- ✍ Paper deluge
- ✍ Toner
- ✍ Documents kept all over the place
- ✍ Not accessible to all
- ✍ Confusion between different versions of a document
- ✍ Slow

Why manage electronic documents?

- ✍ Email clogged with huge files
- ✍ Documents/information inaccessible:
 - 📁 *Documents stored on local PCs*
 - 📁 *Hard drives crash*
 - 📁 *People leave or go on leave/sick leave*
 - 📁 *Technological change*
 - 📁 *Inadvertent destruction*
 - 📁 *'Lost' documents*
- ✍ Questionable authenticity
- ✍ Unnecessary retention

Advantages of EDM

- ✍ Documents stored in a central place
- ✍ Server backed up daily
- ✍ Information storage standardised
- ✍ Accessible to anyone with access rights
- ✍ Faster and more effective retrieval of information
- ✍ Access speed is limited only by hardware
- ✍ *Reference* to file emailed
- ✍ Built-in viewer
- ✍ Life-cycle management
- ✍ Saving on paper and toner
- ✍ Less space needed for storing documents

Where to start – Needs analysis

- ✍ Identify needs – involve key stake holders
- ✍ Identify current practice
- ✍ Identify software that meets the need
- ✍ Identify costs involved
- ✍ Meeting(s) with the supplier to customise product

Requirements (*what we wanted*)

- ✍ **Store easily**
- ✍ **Retrieve easily**
- ✍ **Searches can be done on:**
 - 📁 *Fields on the profile form*
 - 📁 *Contents of the document*
 - 📁 *Advanced searching*
- ✍ **Full text indexing**
- ✍ **Audit trail**
- ✍ **Version control**
- ✍ **Retention schedules**

Requirements (*cont.*)

 **Security**

 **Non-electronic documents**

 **Affordable**

 ***Two different interfaces of the same product***

 ***25 users PowerDOCS for document input***

 ***CyberDOCS, read-only version (25 concurrent)***

What do we store on PowerDOCS?

- ✍ All important documentation
- ✍ In-coming correspondence
- ✍ Paper profiles
- ✍ Paper-system still in place
 - 📅 *Cut-off date: January 2001*

Security

- ✍ Security controlled on OS level
- ✍ Password
- ✍ Group membership determine what PowerDOCS users can do
- ✍ Documents secured
 - 📁 *Access to groups and/or individuals*
 - 📁 *Access rights*
- ✍ Bottom line: Users can access all they are allowed to access, and nothing they are not allowed to access

Problems we experienced

Hardware

 *Recommended specifications for PowerDOCS*

 *Recommended specifications for CyberDOCS*

Software

 *Windows NT*

 *Internet Explorer*

 *Bugs*

Incorrect browser settings

User resistance

Problems we experienced (*cont.*)

 **Very large documents**

 **Legal requirement**

 **Additional costs**

 **Software**

 **Hardware**

 **Training**

 **Additional training**

Responsibilities

- ✍ **System administrator**
- ✍ **Network administrator**
- ✍ **Divisional managers/Executive Management**
- ✍ **PowerDOCS Users**
- ✍ **Non-user (CyberDOCS users)**
- ✍ **Supplier**