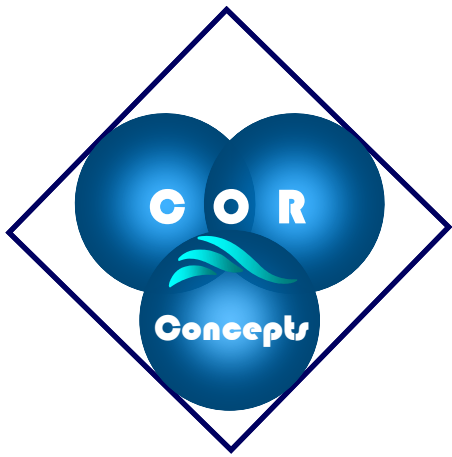




DAMA South Africa

Business stories with Content,
Document and Records Management
June 2017

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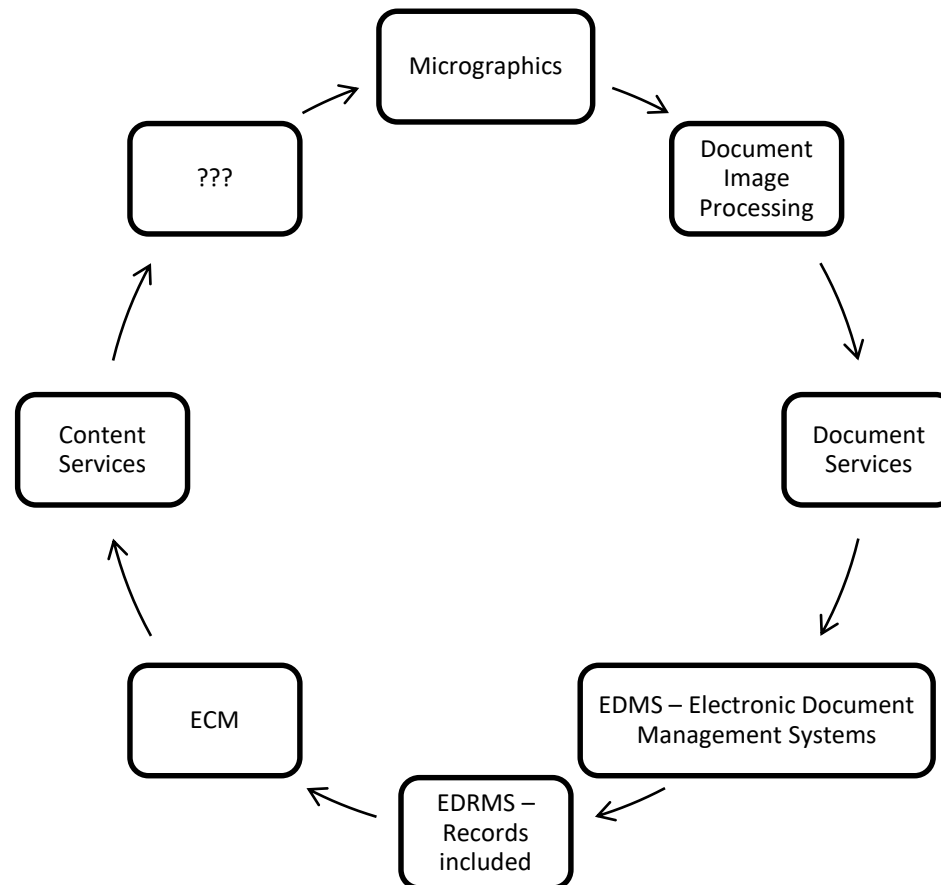
Agenda

- What is ECM?
- How does it relate to document and records management?
- Stories from the coal face.
- Evolutionary aspects of ECM
- Lessons learnt
- Where to from here?



What is ECM

- Enterprise Content Management – a journey





What is Content?



Web Pages



Forms



Electronic Documents



Print Output



Paper Documents & Files



**Photos,
Graphics,
Video**



Email



Fax



**Enterprise
Applications
(Invoices,
Statements, etc.)**



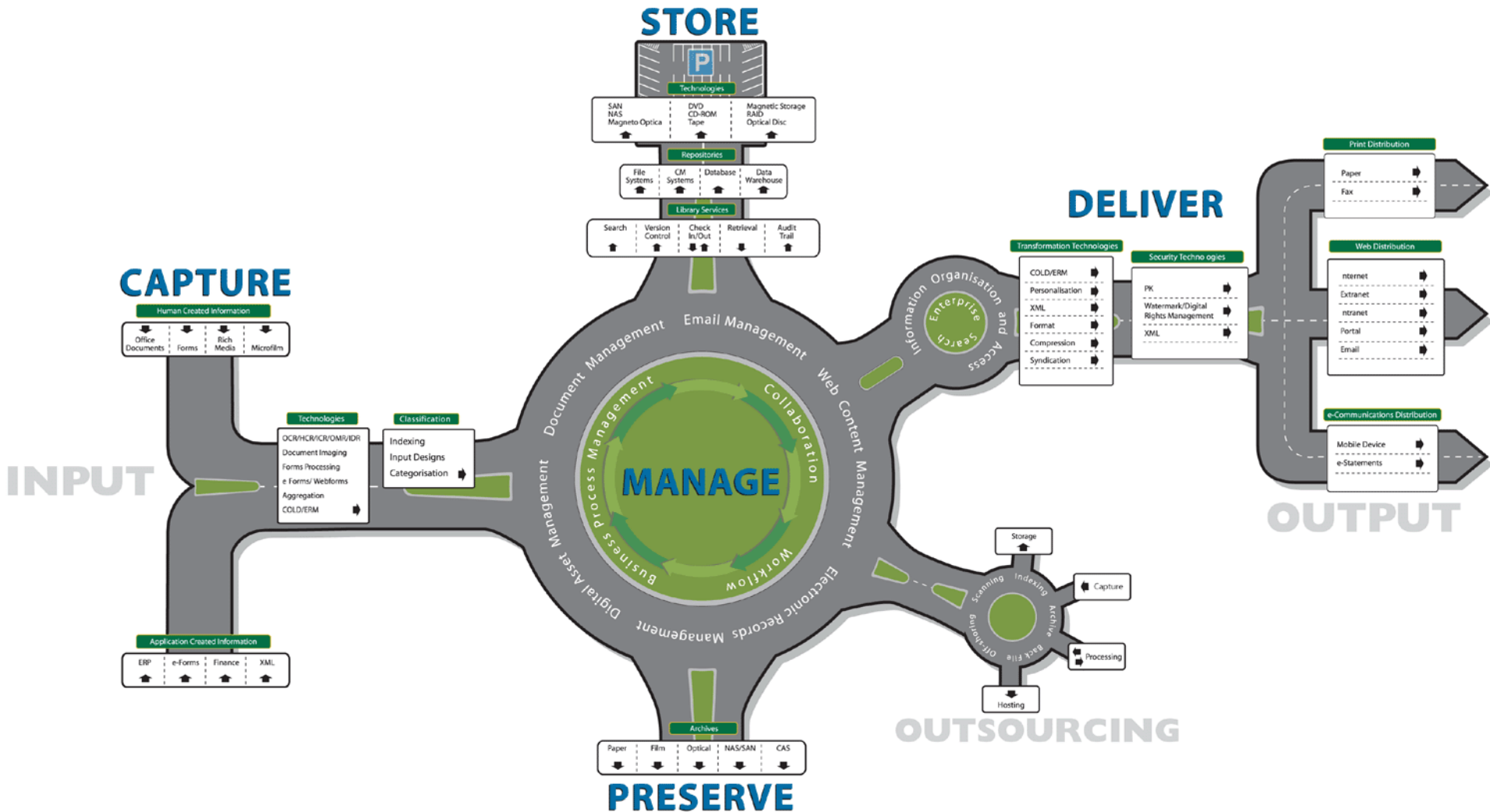
Meta Data

Collaborate
Create, access, and manage
Structured and unstructured
Search
Lifecycle management
Enterprise wide
Archiving
Secure

ENTERPRISE WIDE



AIIM ECM Roadmap





Typical components

Correspondence Generation & Management

Input Handling

Scanning

Forms processing

Workflow

Production Workflow

Ad hoc workflows

Repositories

Documents
Images
Records
Knowledge
Paper
Forms

Output Management

Outgoing Documents

Back scanning/Off-site paper and electronic storage





EDRMS v ECM

EDRMS

- Imaging
- Document Management
- Records Management
- Report Management
- Paper management
- Workflow

ECM

- EDRMS +**
- Web Content Management
- Digital Asset Management
- Digital rights Management
- Business Process Management
- Portals
- Forms Management
- E-mail archiving
- Enterprise search
- Digital Signatures

Enterprise Content Management

Document Management

Version control,
Check-in/ Check-out,
Scanning/ imaging

Records Management

Approved records
Unalterable

Collaboration

E-mail
Fax
File transfer

Workflow

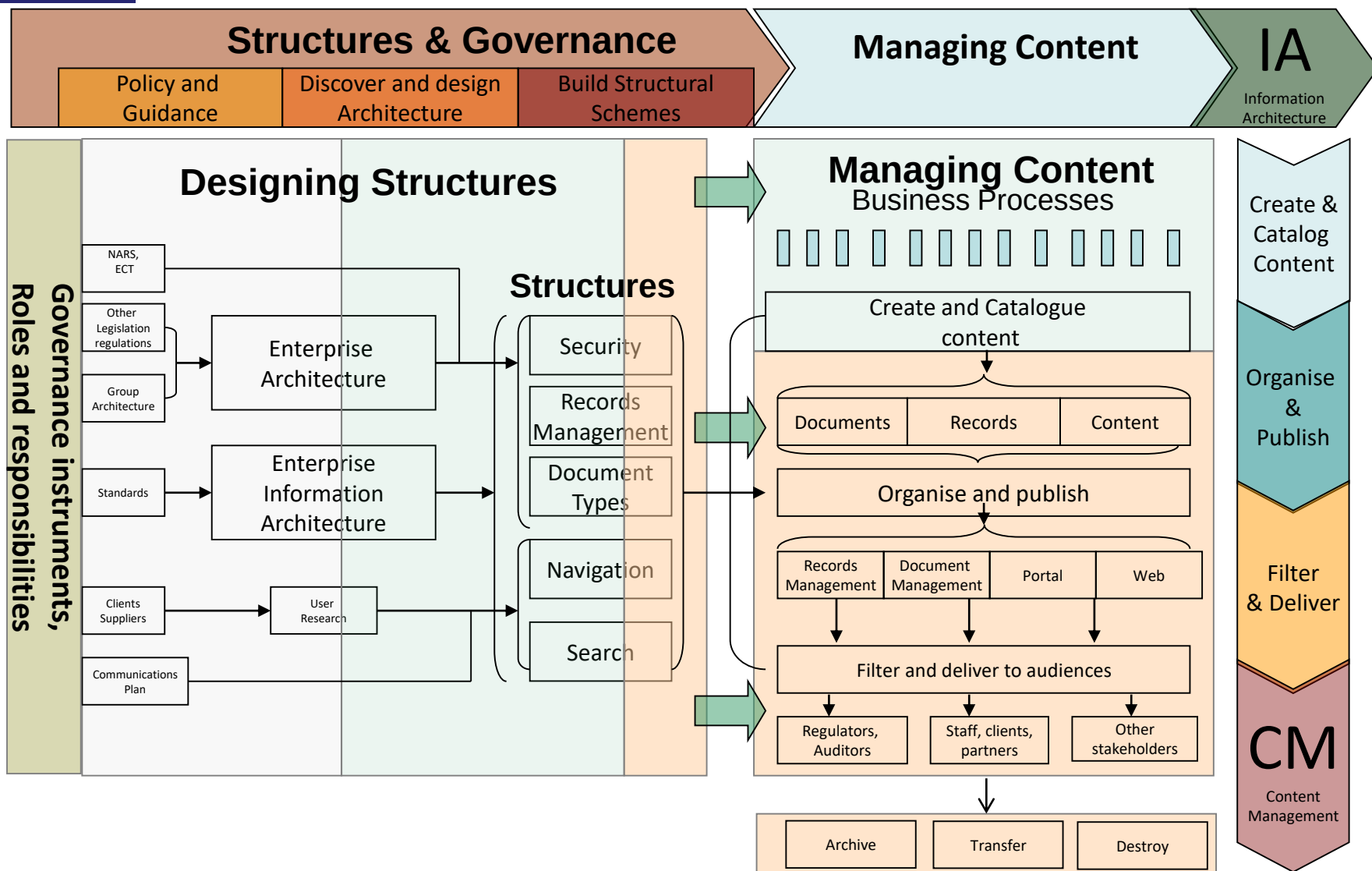
Basic routing of document as
related to business process

Web Content Management

E-Conferencing
Internet Forums
Portals

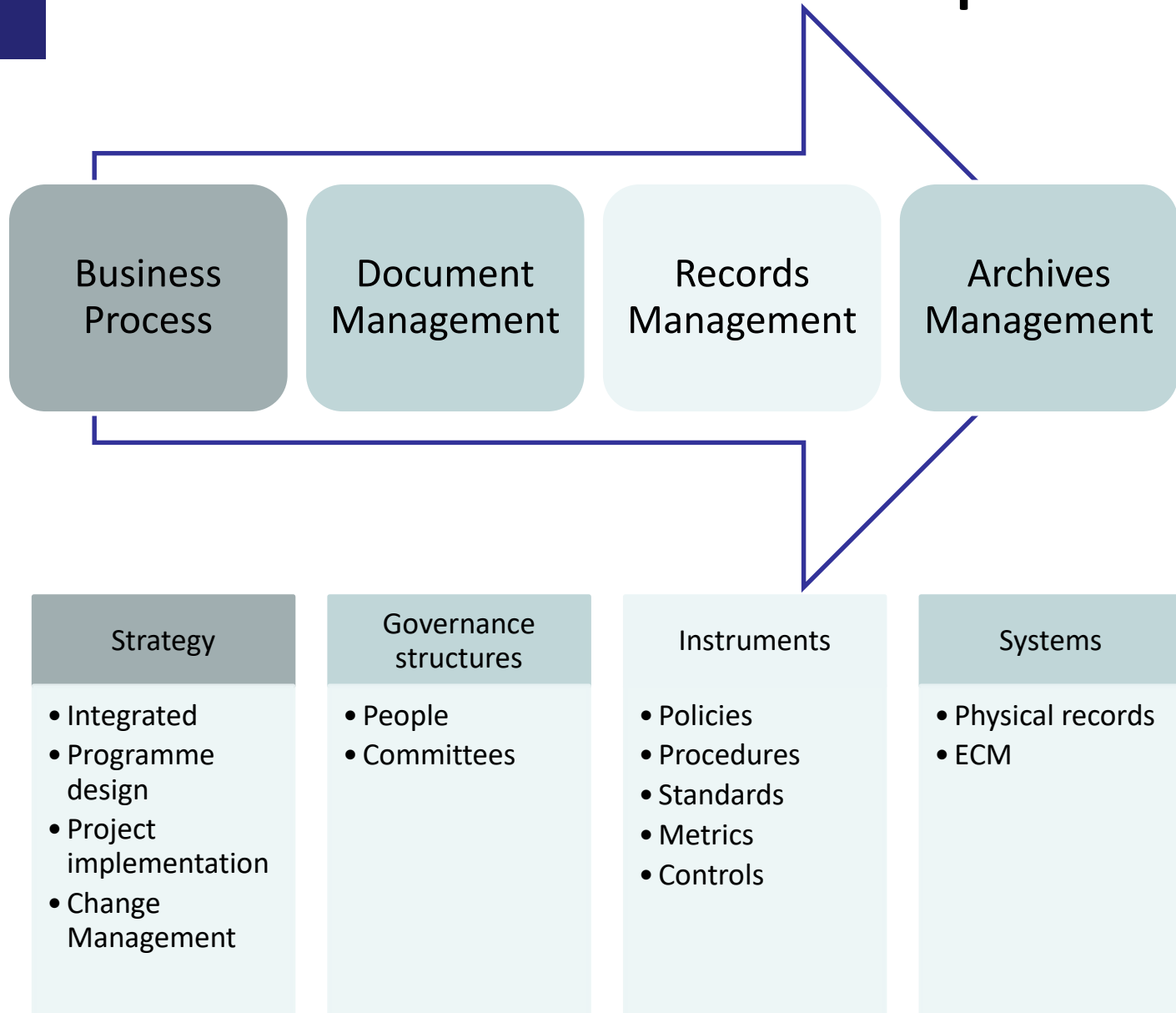


Interrelationships





Interrelationships





Architecture

Ad hoc & Reference copy Scanning



Multi-Function
Devices
Stand-alone
scanners



Production Scanning



Large format Scanning



Audio-Visual



Procurement

Finance

Plant

HR

ICT

QMS

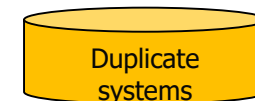
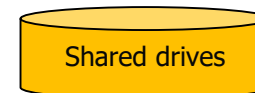
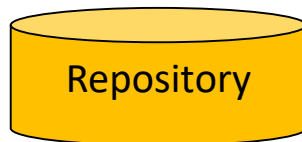
Document creation
& retrieval

Line of Business Applications

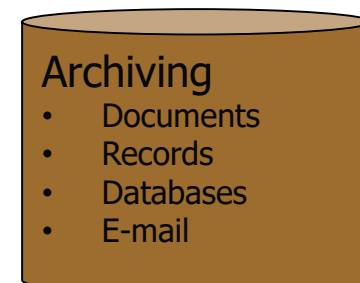
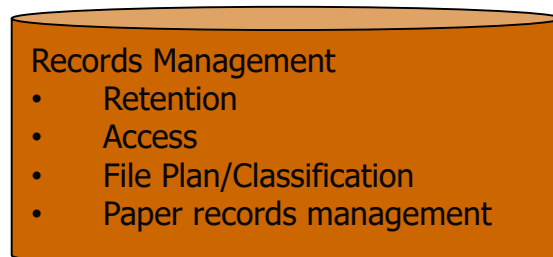
Business
Systems

Intranet, Collaboration and Document management
Cross-system Search

Basic Content
Services



DOCUMENT
REPOSITORIES

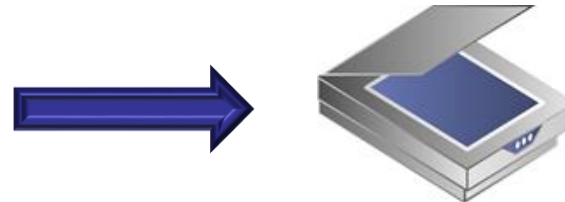
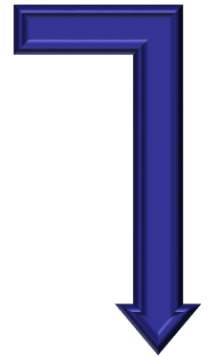




Forms of information

POPIA considerations

Protection of Personal Information – all must be managed consistently



Documents/Records





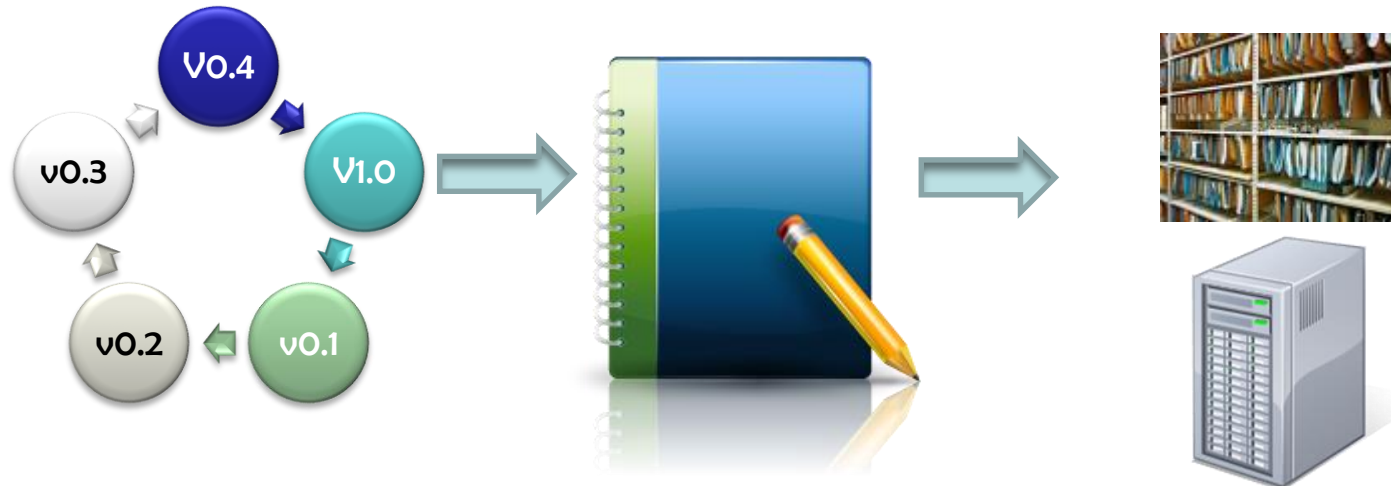
Information processes

Info creation

Declared as record or
Knowledge asset

Formal repository

Archived



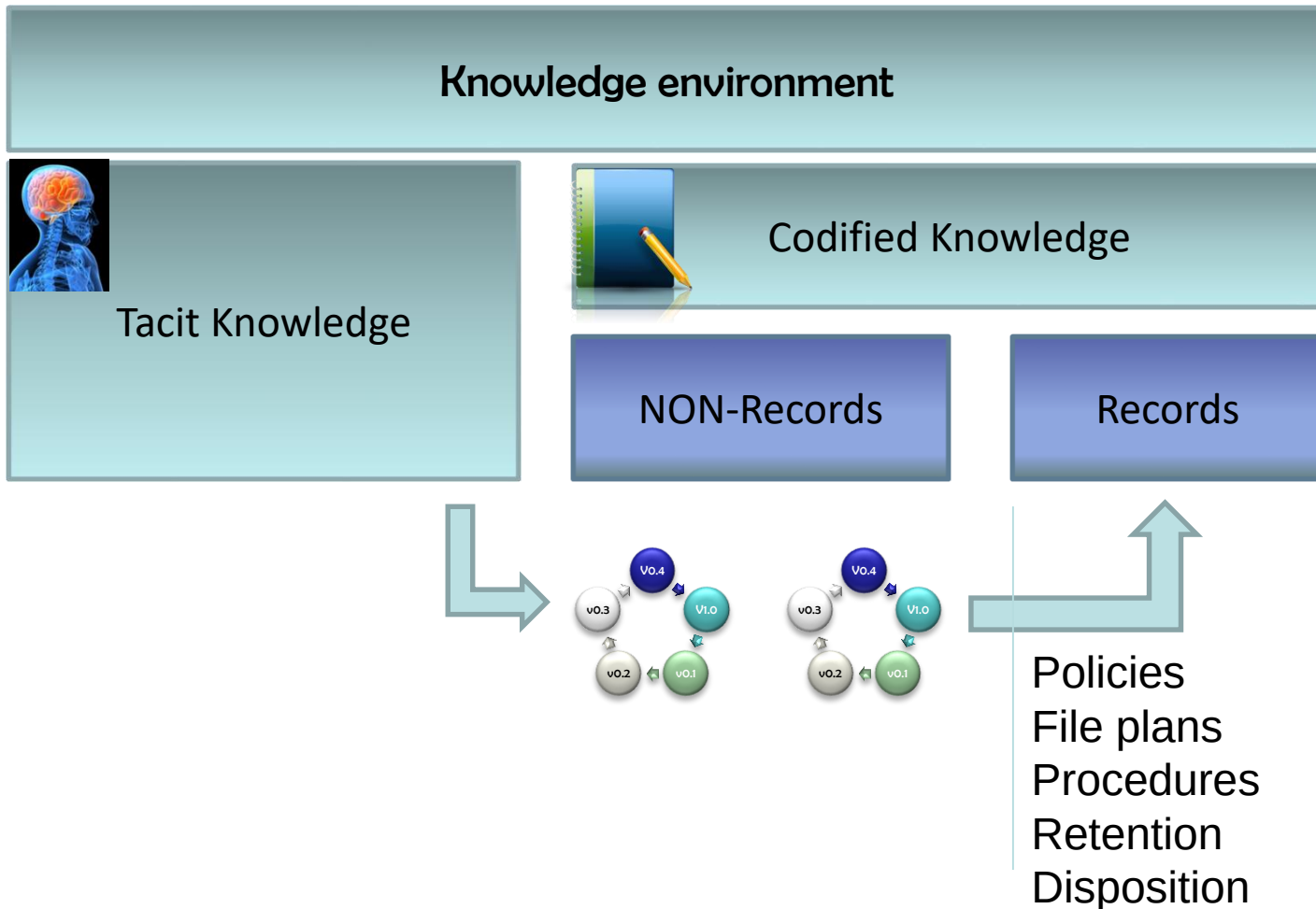
Who creates or receives it
What format is it in?
Should it be converted?
Where is it?
Where can it be stored?
Which processes require it?

What rules are in place?
Who creates them?
How are they implemented in systems?
What intervention must users take?

Where must they be stored?
When?
How?
By whom?



Positioning KM DM and RM





Evolutionary processes

- Forms.
- Scanning → born digital
- Backscan
- Electronic signatures.
- Backwards integration into processes.
- Integration into Line of Business Systems.
- The role and reporting structure of champions or stewards.



Stories and pain

- Multiple systems
 - Built into ERP and other LOBs
 - Legacy
 - “My needs are unique!”
- Systems not used
- Not adding value
- Too much work to capture
- Corporate standard too expensive – so users go elsewhere



Stories and pain

- Knee jerk implementations – scanning to CD for disaster recovery purposes
- Systems thrown out because users didn't like them
- Too expensive
- Non-compliant
- Cloud. The perfect storm?



Lessons learnt



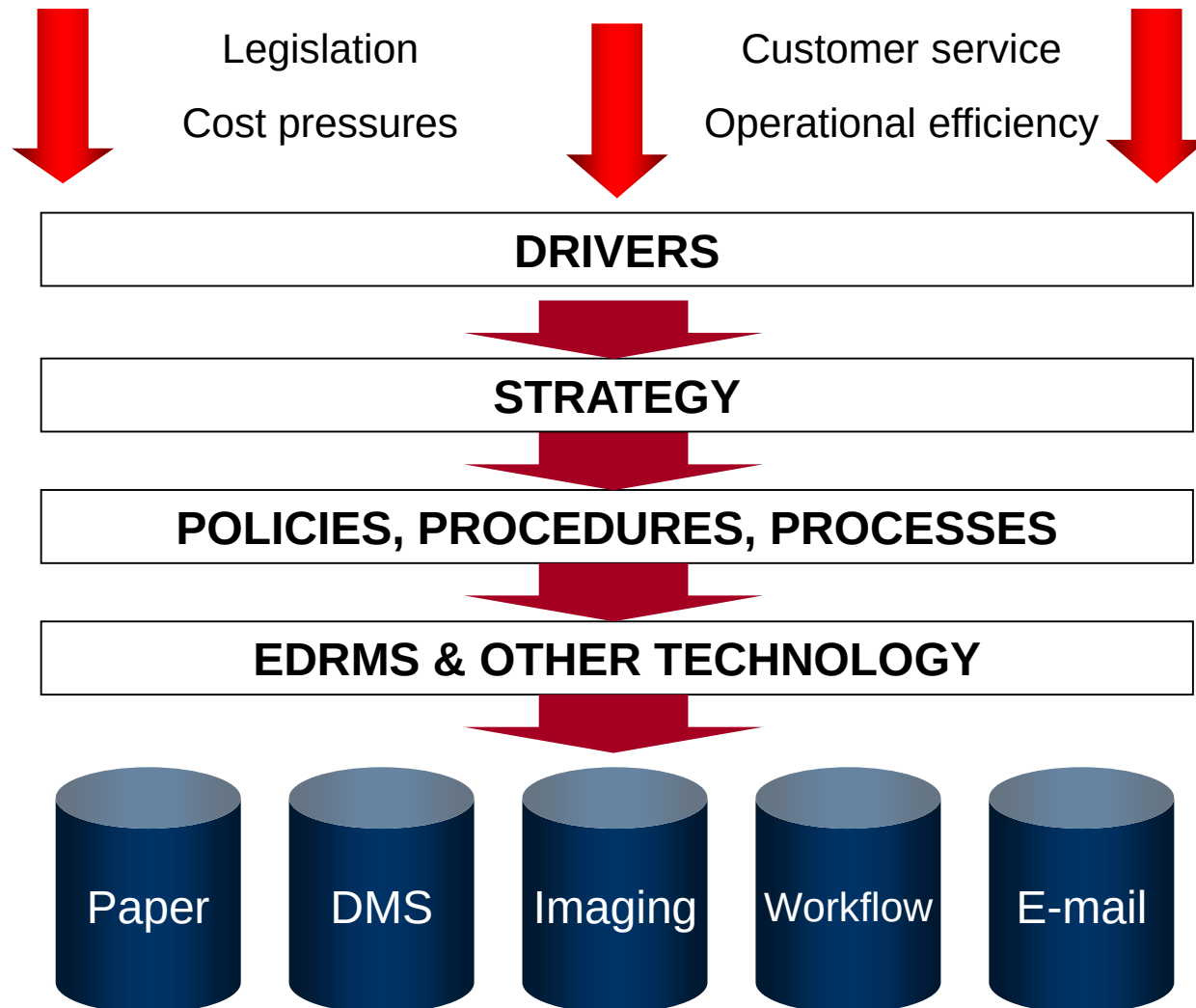


Must haves

- Management commitment & Buy-in
- Change management (Starts long before implementation)
- Clear business case and understanding the potential benefits
- Readiness
 - Policies, procedures, file plan, retention schedules, practices, infrastructure
 - Time and allocation of staff
 - Mind set



Avoid the pain

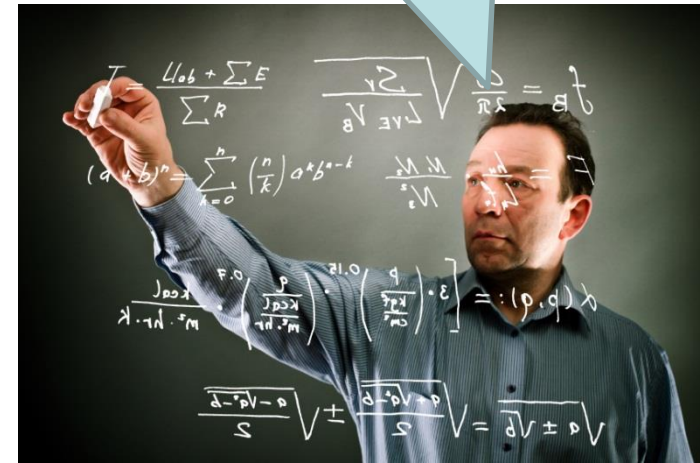




A strategic approach

Understand the big picture
Plan for the future, and
Where you want it to be

**Think
BIG!**

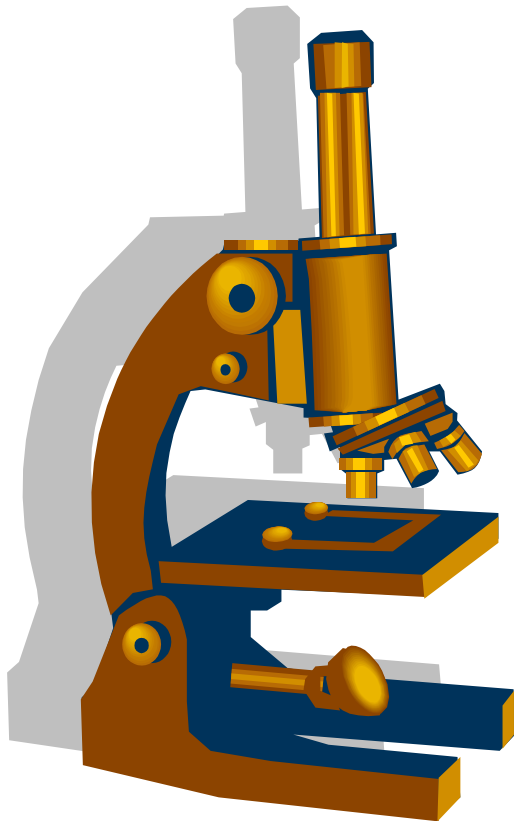




A strategic approach

Implement small

- Get the basics right
- Focus on quick wins
- Deliver real tangible benefits
- For one department
- Build trust.





A strategic approach



- Rollout Fast

- Build on the wins
- Keep the momentum



Questions?

Final questions and discussion

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