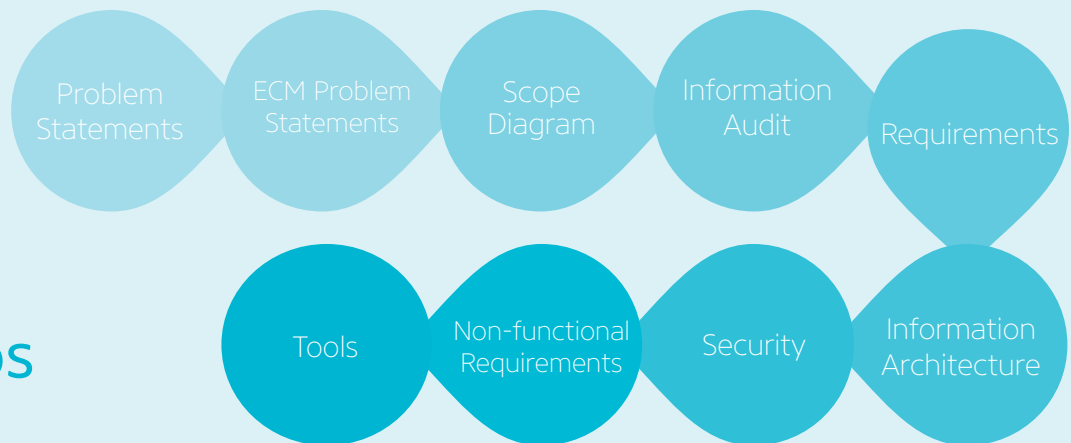


ECM Quick Start

Abbreviated TV manuals inspired the ECM Quick Start. It's the Quick Start guide, which sits alongside the chunky manual, designed to get the user up and running as quickly as possible!

This White Paper provides an overview of the nine steps needed to implement an ECM (Enterprise Content Management) system in your organisation, with key focal points and examples.

The Nine ECM Steps



Step 1: Problem Statements

The first step is about recording user-identified issues. Keep it generic and high level for now. What's going wrong and why?

Your users will have a lot of common issues, for example being unable to locate content.

Your users know their processes better than anyone. This is their chance. Record everything.

A problem statement example is: There is too many document repositories e.g. local drives, MS Outlook, USB keys.

Step 2: ECM Problem Statements

Once you have completed a list of problem statements, start looking at the issues from an ECM perspective. For example, "Amy the Accounts Administrator is the ECM go-to person and spends 30% of her week helping people with their ECM issues even though it's not her job". Next, refine the problem statements and merge duplicates.

Traceability is key to the success of the ECM implementation.

The problem statements can now be turned into project scope statements. For example, the problem statement "There are too

many document repositories e.g. local drives, MS Outlook, USB keys" will have the project scope statement, "To have a centralised ECM".

As the most critical step and the source of your ECM project, determining your problem statements should be both honest and accurate. It's also a good time to decide on a succinct name for your ECM project.

Step 3: Scope Diagram

A Scope Diagram is a pictorial representation of your project. Organise your list of project scope statements and start interpreting these statements into a diagram. It usually takes a few goes to get the diagram right. Keep in mind that the object of the diagram is to:

1. Give a simple pictorial view of your ECM project
2. To be easily understood by all of your users

As a standard practice, all ECM and IT projects should have a scope diagram.

Step 4: Information Audit

This step involves organisation information analysis in its current state; identify stakeholders and



SME's (Subject Matter Experts) who can assist with this step. It's also the time to list key documents and identify weaknesses and pain points in current processes. An output of this phase is cost benefits opportunities. Analyse what the hourly cost is to the business is for of certain process pain points. There will also be Records Management opportunities like the development of metadata, classifications and scanning.

Also, start thinking about migration. What will you migrate over into your new ECM? What about security? Will you update the current security model?

Step 5: Requirements

Think of your requirements as a detailed shopping list. Build your requirements from your findings from the previous steps and reference each requirement to a project scope statement:

1. Group your requirements by function
2. Rate and score each requirement
3. Use a project methodology that suits your project.

If you're using an ECM vendor, they should already have a pre-set list of requirements. This is because ECM projects tend to resolve the same kinds of issues.

This step is about looking at your data flows, classifications and ecosystems. If you're a government agency, look at the Public Records Act requirements, and retention and disposal schedules. Metadata also require some thought, what sort of information needs to migrate to the new ECM? It's also a good time to start building your new file plan.

Step 6: Information Architecture

This step is about looking at your data flows, classifications and ecosystems. If you're a government agency, look at the Public Records Act requirements, especially best practice, and retention and disposal schedules. Metadata

Look at the theory and see how this can be applied practically.

also require some thought, what sort of information needs to migrate to the new ECM? It's also a good time to start building your new file plan.

Step 7: Security

Decide if you will re-use your current security model, or create a new one. Remember that best practice is to look at security by groups, not individuals. In addition, a standard naming convention will greatly assist your Systems Administrator.

Step 8: Non-Functional Requirements

NFR's (Non-Functional Requirements) cover all non-functional activities like Change Management, Testing and Training. In Change Management, use wide ranges of communication tools, which best suit, organisational operations. For testing, use generic test scripts and keep it simple. The aim of testing is to try and break the ECM. Training will be covered in your Training Needs Analysis. Consider how your users will be trained (classroom training to webinars).

Step 9: Tools

The tools are overarching throughout all these nine steps. There are a number of free online resources to help get you started:

1. MS Visio – scope diagrams and process mapping
2. Archives NZ – new RM standards (July 2014), glossaries and continuum publications
3. Templates – Re-use and re-shape what's already done.

Conclusion

This ECM quick start is a great way to begin your ECM project. By linking project scope statements with problem statements, a clear way forward can be determined.

Build on each of the steps to suit your own particular organisational needs, flexibly making adaptations where required.

An ECM project is a large undertaking, but by breaking it into smaller steps it is more manageable and more likely to be successful. And it's much less daunting with an ECM expert by your side.

Techtonics' proven ECM experts are available to assist you now.



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