

# **Implementing Electronic Document Management (EDM) with GMB**

A Road Map



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## What is EDM?

### Knowledge

All organisations seek knowledge. Knowledge is the information gathered and stored by its people. Quality knowledge is not possible without access to all sources of knowledge held by an organisation.

Every organisation faces the challenge of 'knowing' what information it holds and of being able to access that same information instantly. In general, organisations hold knowledge information in three forms:

- Paper - Traditional Information
- Electronic - Modern Information
- Tacit - Employee Knowledge

### Electronic Document Management (EDM)

For many years, records management and the physical filing and retrieval of information were what companies did until the 80's when word processing sprung into life. Suddenly, documents were appearing in hard copy and on computer.

Over the next decade, document and document image management tried to find a footing in corporate and government offices but even though they worked to a degree, they were complex, extremely expensive, hard to manage and a lot of effort was required for the users to index documents.

Electronic Document Management applications are designed to 'capture' all information held by an organisation and make it accessible, whether it is paper, electronic or tacit.

EDM is the evolution of information management that extends to include all forms of knowledge. EDM can now store and index disparate knowledge that is stored in documents, images, spreadsheets, other file formats and the biggest one; email.

The costs associated with capture and storage of information has been reduced extensively and the tools to manage and maintain the information have matured. This makes EDM more accessible to Corporations and Governments.

### EDM and GMB

Since 1984, GMB has been developing and delivering record, information, document and image handling solutions and understands the strengths and weaknesses of information management and how it relates to EDM.

The GMB flagship RecFind 5 is the latest EDM release of a multi-dimensional suite that addresses workflow and reporting, with records, email, document, image and content management in a single package. Specifically, GMB targeted the simple ability for users to index, store and retrieve the information easily.

This document explains how GMB provides a complete EDM solution with the methodology to make it work and provide knowledge and value to your organisation.

## **EDM Functionality**

As mentioned earlier, an organisation's knowledge is generally held in three forms and each form of information has its own unique needs for management and delivery.

A successful EDM solution must handle the management of the three information types and provide mechanisms for relevant delivery to the employees.

### **Paper Handling**

Paper is often the largest database within any organisation and the most difficult to access and an EDM solution needs the functionality required to manage and access information held in paper form.

This means that an EDM solution should be able to track hard copy documents, provide management tools and include the functionality required to convert paper to electronic format, i.e. images or text, as required.

### **Electronic Documents**

The growth of electronic information began in the early 1980s with the advent of the first desktop computers or PCs. In the early days it was largely composed of documents produced by word processors and spreadsheets

Today, electronic documents could also be web pages, presentations, databases and links to other applications or even other organisations. Not surprisingly, the largest volume of electronic information is now within the email store, buried somewhere within countless Exchange, GroupWise and Domino eMail servers.

An EDM solution should include all of the functionality required to capture, index, store and access all forms of electronic documents, including emails.

### **Tacit**

Tacit knowledge is the last knowledge management frontier. The real challenge is how to get employees to enter 'what they know' in an orderly and structured fashion such that it can be searched and viewed by other employees.

An EDM solution should include the functionality for employees to enter, index and store any amount of tacit knowledge on any topic.

### **Delivery**

The final key that links the various information to the employees and/or customers, is the ability to deliver relevant information either on request or proactively. This process is known as workflow or business process automation (BPA).

A Total EDM solution needs to have a fully integrated workflow package so that automated and manual delivery of information can occur.

In addition, the ability to report on the throughput of these processes provides ways for management to review performance and manage resources properly.

## Where to begin?

Beginning is always the hard part. Several things are required for any successful EDM installation and include:

### Ownership

EDM is an enterprise-wide application. How can you say you have EDM (i.e., control of and access to all documents within your organisation) if you only have it installed in one or two parts of your organisation on a small percentage of your desktops?

But, an agreement to install EDM enterprise-wide requires 'ownership' of the project at the highest level. A CIO or Director or VP has to say, "Let's do this!" This same senior executive then has to declare ownership and direct the project through to its conclusion.

### Leadership

The Executive owner won't have time to be the day to day leader of the project. This requires someone senior and knowledgeable and reporting directly to the Executive owner. This is a full time position; don't kid yourself that an already busy executive or manager can handle this as well as his/her other duties.

### Change in culture

Most people don't like change; never have and never will. Most people do not like you knowing the contents of every letter they have received or sent or, even worse, every email they have received or sent. Some people definitely do not want you to know about certain emails.

The first and major change is to make everyone realize that everything 'at work' is the property of the enterprise, not the individual employee. I have attached a sample email policy as Appendix C as an example of how to begin to change this culture.

The second major change in culture is to train people to search and interrogate your enterprise information store before making decisions. This can be achieved through formal training courses, seminars, newsletters and example.

The change in culture takes time and has to be 'sold'. Explain to each and every employee what you are doing and why you are doing it and what the benefits are to the employee and the organisation and its customers and its suppliers. Do not try to do it in secret and do not try to 'force' it onto your workforce; if you take this route your will certainly fail.

A culture change takes time and not every employee will be won over and not every employee will be cooperative. Be prepared for this; be happy with a 95% acceptance.

However, you can lessen the pain of this cultural change by making the actual implementation and operation of EDM as non intrusive and as easy as possible to use. A successful EDM implementation should bring significant productivity gains; not productivity losses. Employees are not stupid; if they find their normal work taking more time rather than less time after the EDM implementation you are in trouble.

## **Product set**

This is where GMB comes to the party. We can supply a complete product set enabling you to easily capture, manage and access all forms of documents; paper, electronic, image, email or whatever. See Appendix B for a list of the GMB products and their part in the EDM process. The GMB EDM products are all part of a fully integrated set; they work co-operatively from the beginning, sharing a common relational database and there is no integration required. They just work.

## **Project Plan**

Without a plan you will never know when you are going wrong. Ergo, if you start without a plan you will inevitably fail. A plan isn't inviolate; it is supposed to change as you progress and learn and react to feedback from employees and customers and suppliers. But, without a plan there is nothing to change. We give you an outline of a project plan in Appendix D.

## **Consultancy**

You can't implement EDM without knowing:

- How you currently work
- How you want to work
- What standards and procedures you currently have
- How those standards and procedures will need to change (e.g., email policy)
- What information you currently have (or think you have)
- What information you plan to have after the EDM rollout
- What you plan to 'convert' and how you plan to 'convert' existing information
- How many people need training and the types of training required
- What computer/server/network resources you will need

All of the above require someone (suitably qualified) working full time in a consultancy capacity to investigate, document, present and eventually, gain agreement on.

GMB has developed some standard consultancy modules, (pre-implementation, implementation and conversion) to address most of the above needs. We can either supply one of our trained staff or someone from one of our partners or we can train and 'coach' one of your internal consultants to carry out the required consultancy.

## **Training**

GMB has developed a standard set of training courses for all of your needs. As with consultancy, we can either run the courses for you or we can train up one or more of your people in a 'train-the-trainer' approach.

You will not be successful unless you train your staff; it is major part of changing the culture and of the selling process.

## The Value of EDM

So far we have explained what EDM is, what functions it offers and what it is you need to begin an EDM project, BUT the major factor to consider is the business reasoning, why making an investment in EDM can add value to your organisation.

EDM is now a mature technology. Gone are the days of high expense, low quality and low reliability. If your organisation ventured into EDM before and shelved the project, now is the time to re-evaluate EDM as a valued solution.

The business benefits of implementing an EDM solution now are simple, as EDM:

- Saves time in the retrieval of documented information
- Saves time and frees resources by automating current manual processes
- Increases quality of service through reduction of lost information or work
- Makes the capture of information easier and cheaper
- Supports and Indexes any electronic file format
- Brings an organisation closer to the “paperless office”
- Has improved information management and administration tools

GMB's highly configurable Corporate Suite has been used for management of correspondence, records, documents, information, assets, property, people and customers, without programmer intervention and on the one system.

Organisations that have reduced spending on corporate systems can now enjoy the benefit of using one corporate system to fulfil the needs of many departments. GMB also offers enterprise information that can also exist across all departments, adding value to your current corporate system investments.

If you are an existing GMB customer who has RecFind already, the costs can be reduced by using RecFind for other departments. Instead of buying another new product and going through lengthy tender processes, your organisation can benefit by using existing in-house expertise and experience on a known system by expanding its functionality and reach.

## Evaluation

By now, you should be considering where your organisation is with Electronic Document Management and be asking yourself these questions:

- Is EDM in the culture of your organisation?
- Has management delegated ownership of corporate information?
- Do you have policies to protect your organisation?
- Do you have the procedures to support the policies?
- What are your plans for the future?
- Are you prepared for the next stages of growth?
- Will your product drive performance for now and the future?
- Do you have a project leader, project owner, consultant and trainer?
- Will your business partner help supplement your needs?

If you are not sure, start by considering correspondence management, apply the questions above and consider the following specific ones:

- How many points of entry will correspondence enter your organisation?
- Does your system support entry points such as Mail, Email, Fax and Web?
- Do you trap and index all valuable business information?
- Are there automated processes related to the different types of requests?
- Can employees gain easy access to all relevant corporate or customer information?
- Can management review and report on business process activity?

Once you have an idea to the answers above, you have the building blocks to proceed.



## The GMB Approach

GMB offers scalable solutions that can handle a full blown Electronic Document Management Solution or provide a mechanism for growth and evolution towards complete EDM.

Key functions that are included in the RecFind Corporate Suite or can be added progressively and include:

- Paper Document and Box Management
- Document Management
- Document to Image/Text Conversion
- Electronic File Management
- Simple Button Capture of Documents from Common Applications
- Local, Remote and Internet Electronic Document Search
- File Filtering and Routing
- Volume Image Handling
- Volume Email Handling
- System Performance Enhancers
- Archiving Facility

Once contacted, a GMB Consultant can help evaluate your current implementation and investigate areas where enhancements may add value to your organisation or where a new corporate system can integrate with your environment, providing complete knowledge access for your employees and customers.

GMB have proven methodologies for evaluating and implementing EDM solutions from many years of experience working with many industries and departments.

In the near future, GMB will be releasing a new product called K1 (Knowledge One) that can evolve your EDM implementation on a path towards Total Knowledge Management (TKM).

Start your new EDM approach today by discussing the thoughts, strategies and requirements of your organisation with management, departmental heads and knowledge workers and then contact GMB.

You can find the GMB contact information at [http://www.gmbsupport.com/contact\\_us1.htm](http://www.gmbsupport.com/contact_us1.htm)

## Appendix A

### History of GMB

GMB delivered its first document management product in 1984. It was called DocFind and it was marketed by the Burroughs Corporation for its BTOS PC range. We delivered our first records management product, RecFind 1.0, also for the BTOS range, in 1986. In 1987 we delivered our first imaging product, ImageFind. In the time between 1984 and 1994 (when we produced our first Microsoft Windows version) we combined the features of DocFind and RecFind and ImageFind into the RecFind product range and produced versions for the IBM AS/400, Novell, Microsoft networks and UNIX.

The first version of RecFind to include full records management and electronic document management and imaging and workflow functionality was RecFind 3.2, first delivered in 1999. This was also the version when we introduced the RecFind-Button, then a revolutionary way to capture electronic documents from within the native application.

Between 1994 and 2001 we completely redesigned and rewrote RecFind culminating in RecFind 4.0 in 2001. RecFind 4.0 was a superset of RecFind 3.2 and included many new and improved features including automatic version control and check-in and check-out.

The latest release, RecFind 5.0, is again a superset of RecFind 4.0 and a major rewrite of most functions. It includes many more EDM features and advanced functions including the new File Filter which can automatically capture electronic documents without user involvement and a fully integrated GEM (GMB's Email Manager), previously a separate product, that automatically analyses all emails according to the user's rules and captures and indexes all selected emails as corporate-records in the RecFind-Corporate 5.0 relational database.

RecFind 5.0 also now includes a configurable data model, (or more specifically, multiple configurable data models because one copy of RecFind can manage discrete data sets), as well as configurable reports, captions and help screens. RecFind 5.0 is truly the first 'multi-tasking' application, able to process multiple applications concurrently.

GMB currently services around 1,000 customers around the world in such places as USA, UK and Australia. GMB have also implemented a wide variety of solutions in Top 1000, Government, Education, Finance, Banking, Health and Media industries that includes functionality for correspondence, records, asset, property, HR and customer management.

## Appendix B

### GMB's RecFind 5.0 Product Set

The following products are fully integrated and share the same relational database using either Microsoft SQL Server or Oracle as the DBMS. They provide complementary functions and have been designed by GMB to work together to provide a complete solution for EDM for any organisation, addressing all needs. Apart from your relational databases product (SQL Server or Oracle) and your normal office applications (e.g., Word, Excel and Outlook) you do not need anything else. These same GMB products also integrate seamlessly to your office products, (including WordPerfect, GroupWise and Notes).

#### **RecFind-Corporate 5.0**

RecFind Corporate is the main engine and the manager of the shared relational database. RecFind-Corporate provides the core functionality for records management, electronic document management, imaging, workflow, content management, security, searching, reporting, etc.

#### **How many RecFind-Corporate licenses do I need?**

The easy answer is not very many. RecFind-Corporate licenses are for administrators and 'power' users. They are also concurrent user licenses so you would normally expect to be able to support from two to four 'real' people with one RecFind-Corporate user license.

#### **RecQuery-TC 5.0**

This is the 'thin-client' that provides secure access to the RecFind-Corporate relational database. It runs in a browser so it doesn't involve your IT department installing or rolling out desktop software (saving them time and money). RecQuery-TC provides access to all documents and workflow. Its searches duplicate the functionality of the searches within RecFind-Corporate providing full text access to all Metadata and electronic documents (including emails and the attachments to emails).

#### **How many RecQuery-TC licenses do I need?**

Everyone without access to a RecFind-Corporate license should have access to a RecQuery-TC license. What is the use of an enterprise-wide EDM store if only a few employees can access it? The good news is that RecQuery-TC licenses are also concurrent user licenses and you can reasonably expect one RecQuery-TC user license to support from five to ten 'real' users.

#### **AIM 5.0**

This comes free with RecFind 5.0. Its job is to reduce WAN traffic for RecFind-Corporate licenses by around 95%. It is a 'third-tier' asynchronous process relieving the RecFind-Corporate client software of 95% of the workload (mainly to do with indexing the full text of Metadata and electronic documents).

#### **How many copies of the AIM Engine do I need to install?**

Just one, on the same LAN as your database server.

### **The RecFind-Button 5.0**

People who are required to capture electronic documents as well as check-in and check-out electronic documents should not be required to be experts in RecFind-Corporate and nor should the workload required be onerous.

The RecFind-Button sits in the toolbar of packages such as Word and Outlook. It takes only a few minutes to teach a user how to use the Button. Thereafter, it only takes a minute or so every time the user wants to save or check-out or check-in an electronic document (including emails). It is a GMB original invention and is the worlds easiest, fastest and most secure way to access the corporate store of electronic documents.

### **How many RecFind-Button licenses do I need?**

Everyone in the enterprise should have a RecFind-Button license. This is the lowest cost, easiest to use and most essential part of the RecFind-Corporate Suite. With the Button you can capture electronic documents (Word, Excel, and Outlook) and check-in and check-out electronic documents. The user does not have to leave the native application and it only takes a few second to capture, index and store an electronic document as a corporate record.

### **The RecFind File Filter 5.0**

This is a very clever invention; it scans your file store and automatically captures any new or updated electronic documents and then automatically stores and indexes them within the RecFind-Corporate database. It also comes free with RecFind-Corporate.

The File Filter has been designed to work in conjunction with the RecFind-Button. It is a complementary service. It will capture any electronic documents or new versions of electronic documents 'missed' by the end user with the Button. It will ignore any documents already captured by the user.

If the end user has captured version one and correctly filed it within a profile in RecFind then the File Filter will then catch any newer version not captured by the end user and automatically attach it to the same profile as the next version.

Think of the File Filter as an insurance policy against employees 'forgetting' to capture any new or changed documents.

### **How many filters do I need to set up?**

As many as you require, there is no limit.

### **The High Speed Scanning Module 5.0 (HSSM)**

Turning any RecFind-Corporate workstation into an imaging workstation is as easy as plugging in any TWAIN compatible scanner (RecFind 'sees' the TWAIN driver and automatically turns on the scanning function and buttons). However, desktop scanners are OK for low volume scanning but are not a solution for high volume scanning.

GMB's high volume scanning solution is the HSSM. This includes three components:

## DocScan

This is the component that talks to the high speed TWAIN compliant scanner (usually with a document feed). It scans for a barcode on the first page of a multi-page document and stores documents as multi-page TIFF files.

## ISYS:image

ISYS:image allows you to optionally convert any TIFF image into a text document via an OCR process. This is important if you wish to 'index' the text of any scanned pages; you need to first convert the bit-mapped image into text before you can index the text.

## RecScan

RecScan is the component that reads all of the TIFF and Text files produced by DocScan and ISYS:image and attaches them to the correct profiles in the RecFind-Corporate relational database; making them searchable and viewable by anyone with access to RecFind-Corporate or RecQuery-TC.

RecScan can also be used to 'capture' any form of electronic document from any location, created by any other application and store and index it within the RecFind-Corporate relational database. It is a fast and easy way to 'import' foreign electronic documents into the RecFind-Corporate relational database.

### **How many copies of the HSSM do I need?**

Start with one, a typical mid range high speed TWAIN scanner can process 30 to 50 pages a minute. This means that conservatively, one copy of the HSSM can handle from 8,000 to 10,000 pages a day.

### **Import Export Engine 5.0**

This comes free with RecFind-Corporate. It is used to import or export both metadata and electronic documents to and from the RecFind-Corporate relational database.

You can use this at any time to import information from another system or export information to another system.

### **The RecFind Archive Facility (RAF Module) 5.0**

This comes free with RecFind-Corporate. It is used to archive 'old' electronic document (including emails and attachments) to second level storage. When the RAF modules archives old electronic documents it updates the document profile with the location of the archived documents making it a simple one click process to recover them in the future if required.

### **How often should I use the RAF Module?**

It depends upon your rules and your standards and the number of electronic documents you actually want to hold within the RecFind-Corporate database. There are no limits set by RecFind; you can choose to archive off 'old' documents every say 12 months or you can leave them in the database forever.

## **GEM 5.0**

Now a serious question; when do I use GEM to capture emails and when do I use the Button?

The answer depends upon the severity of your email management problem. If you have urgent legal or compliance issues to address and a major volume of email traffic then you should plan on using GEM to manage your email. You can always start with the RecFind-Button (because the Button and GEM store emails exactly the same way in the RecFind-Corporate relational database) but if you have a 'heavy duty' problem you need a heavy duty solution and GEM is GMB's heavy duty email management solution.

GEM is sold as an add-on to RecFind-Corporate 5.0. RecQuery-TC 5.0 already has the capabilities to search and view emails so it becomes your GEM client. When you order GEM you receive three additional components:

### The GEM Agent

This is the component that attaches to your email server and takes copies of all incoming and outgoing emails writing them to a SQL queue.

### The GEM Rules Processor

This is the component that analyses all emails against your rules and decides which to store in the RecFind-Corporate relational databases and which to ignore.

### The GEM Configuration

This sets up GEM in your email environment.

### **Do I use GEM and the Button together to capture emails?**

No, if you use GEM continue to use the Button to capture all other electronic documents (e.g., Word and Excel) but not emails. GEM will capture all emails without end user involvement.

### **How many GEM licenses do need?**

None if you have already given every user a license to use RecQuery-TC because RecQuery-TC already includes the functionality to search for and view emails and attachments.

## Appendix C

### Sample Email Policy

#### Scope

This document details the e-mail policy for the XYZ Agency. It sets out guidelines for e-mail usage by all XYZ staff members. It clearly identifies those areas where common sense is required (e.g., personal e-mails in the case of a family emergency), as well as those areas where there is no leeway, (e.g., pornography).

#### Objectives

- To make all employees aware of XYZ's e-mail policy.
- To ensure that XYZ's investment in computer hardware, software and services is used in the most productive manner to the greatest possible benefit of XYZ.
- To ensure that all XYZ's business e-mails are preserved and shared as corporate knowledge.

#### Overview

XYZ's e-mail system is a corporate resource and is to be used for corporate business as a vehicle for business to business and business to customer transactions. It should be viewed in a similar manner to XYZ's telephone system in that personal usage should be kept to an absolute minimum. For example, if all exchange lines were in use for personal business, XYZ would not be able to function. The following policies are to ensure that XYZ's e-mail system is used almost exclusively for XYZ business. To this end, all e-mails sent or received by a XYZ employee are XYZ property. There is no concept in the XYZ e-mail system of 'personal' e-mails.

#### Policies

1. All e-mails sent or received via the XYZ e-mail system are the property of XYZ.
2. Employees should give their XYZ e-mail address to people and organisations that are business partners of XYZ.
3. Employees should not give their XYZ e-mail address to friends and relatives who are personal associates of the employee, not business associates of XYZ.
4. All employees must ensure that the latest update of XYZ's anti-virus software is running on their workstation. No attachment can be opened unless the latest version of XYZ's anti-virus software is installed and operational.
5. No attachment should be opened or stored unless the employee can positively identify the sender.
6. No personal e-mail should be sent or received unless there are extenuating circumstances such as a family emergency or crisis.
7. No employee may send or distribute e-mail containing non-business related material such as jokes. This includes sound files, (e.g., WAV), movie files, (e.g., AVI) or any form of such material.

8. No employee may send or distribute questionable e-mail containing expletives or pornography.
9. No employee may send or distribute e-mail containing derogatory, inflammatory, insulting or libellous information about any other XYZ employee, customer, associate or any other person whatsoever.
10. No XYZ employee may conduct any business (whether personal or professional) via XYZ's e-mail system other than legitimate XYZ business.
11. Any XYZ employee receiving questionable material (as described above in policies 7, 8, 9 and 10) should immediately forward all such material to XYZ's e-mail administrator for appropriate action and then delete all local copies.

### **Monitoring e-mails**

XYZ has installed the GEM e-mail management system. This system has been designed to capture all e-mail business transactions and to trap and report all questionable e-mails. XYZ employees should be aware that all e-mails are being monitored to ensure that XYZ's e-mail policy is being adhered to.

### **Consequences**

XYZ employees found to be acting in contravention of the above policies will be warned by the appropriate manager and asked not to re-offend. Employees who continue to disregard the above policy will be formally warned three times and then may face dismissal if the offence is considered to be of a serious nature. Note that any offence associated with pornography (policy 8) or insulting behaviour (policy 9) will be automatically classified as being of a serious nature.



## **Appendix D**

### **Outline of a Project Plan**

#### **The Pilot Approach**

For any new venture into EDM we would normally recommend that you select a 'needy' area (one that is hurting and would really benefit from EDM) and use it as the pilot. I would also select an area that 'wants' to be a pilot, please do not try to 'impose' a pilot on an unwilling (and therefore uncooperative) population.

The idea is to bite off a manageable chunk and refine your practices and procedures before going enterprise wide. You will also use this time to determine how best to configure the various GMB products to best meet your unique requirements.

Note that I said configure, not change. The GMB product set is both highly configurable and extendable and in most cases will contain a superset of the functionality you require.

#### **Major components of the project plan**

The following is not meant to be an exhaustive list, it is meant to be indicative of the major parts of any EDM project plan; use it as a top level check-list.

#### **Management approval**

If you don't have the approval and 'imprimatur' of senior management you are wasting your time and money.

#### **Selection of pilot area**

Find an area that is both needy and willing and one which can demonstrate immediate benefits of an EDM system.

#### **Selection of the project team**

The minimum (and optimum) team should be the team leader, a representative of the vendor (GMB or the systems integrator or GMB dealer), the IT manager or his designate and a representative from the user area selected for the pilot. The larger the project team, the lower your chances of success.

#### **Kick off meeting**

This is where the project team first meets and sets objectives, dates and responsibilities. This is where we begin to define all deliverables from all parties. This is where we sign off on version 1.0 of the project plan.

#### **Pre-implementation consultancy**

This is where you use your consultant and the GMB 'template' to find out exactly what you have and what you need to do to achieve your objectives.

## **Presentation and recommendations**

The consultant prepares a structured report (again using the GMB template) and presents this to the project team and the Executive owner. The report and recommendations are discussed and decisions made.

## **Conversion consultancy**

This can start at any time after the pre-implementation report and recommendations are discussed and decisions made.

Once again, you will use the GMB template to fully investigate any data that needs to be converted to RecFind format and will produce a data map as the input to a conversion specification.

## **Conversion specification**

Your IT staff or GMB or the systems integrator will take the output from the conversion consultancy and produce a conversion functional specification. This is designed to be the input to a program specification (if one is required). Unless there is complex data manipulation involved it should be possible to convert using the RecFind Import/Export Engine, without writing any code.

## **Approval of conversion specification**

As best they can your IT and application staff review and approve the conversion specification. Note that all conversions are an iterative process. This is because the person writing the specification is rarely an 'expert' in both sides. That is, he/she may be an expert in RecFind but not your existing applications. Always assume that there will be several iterations of a conversion specification and several 'test and view' runs of a conversion before the end users are totally satisfied.

## **Training of key staff**

The next phase requires that your key staff are fully conversant (or as much as they can be after a training course) with the capabilities of the various RecFind products. This is required because the next phase is where you determine how best to configure and extend RecFind to suit your needs. Your key staff can't participate or contribute without training.

## **Implementation consultancy**

Using the output from the pre-implementation consultancy, your consultant now works with your key staff to determine how best to configure and extend RecFind to meet your needs. This involves using an installed copy of the software to test and pilot configurations and options until the best set can be determined.

## **Presentation and review**

The consultant once again prepares a report and presents to the project team and the Executive owner. The recommendations are discussed and decisions made on how best to configure and extend the RecFind products.

### **Determine hardware and system software requirements**

The project team works with the IT manager and GMB (or the systems integrator or GMB dealer) to determine all hardware and systems and database software needs. Orders are placed for any required components.

### **Develop training program**

The project team can now determine the training needs of all staff and build a training schedule around both standard and non standard GMB courses.

### **Test converted data**

A test run of the data conversion programs and/or processes (using the RecFind Import/Export Engine) is done with a sample set of data and the project team reviews the outcome. This process continues until everyone is satisfied.

### **Install and test RecFind components**

All RecFind components are installed, configured, extended and tested.

### **Run and test 'live' conversion**

A date is set for the 'go live' time and the existing 'old' data is captured and processed by the conversion program/process. The converted data is validated and signed off.

### **Go live**

Our now fully trained users come up Monday morning and begin using the system.

### **Review**

You should probably meet daily for the first week and then weekly for the next three weeks and then again in three months time to review progress and to see how well you have done in meeting your objectives.