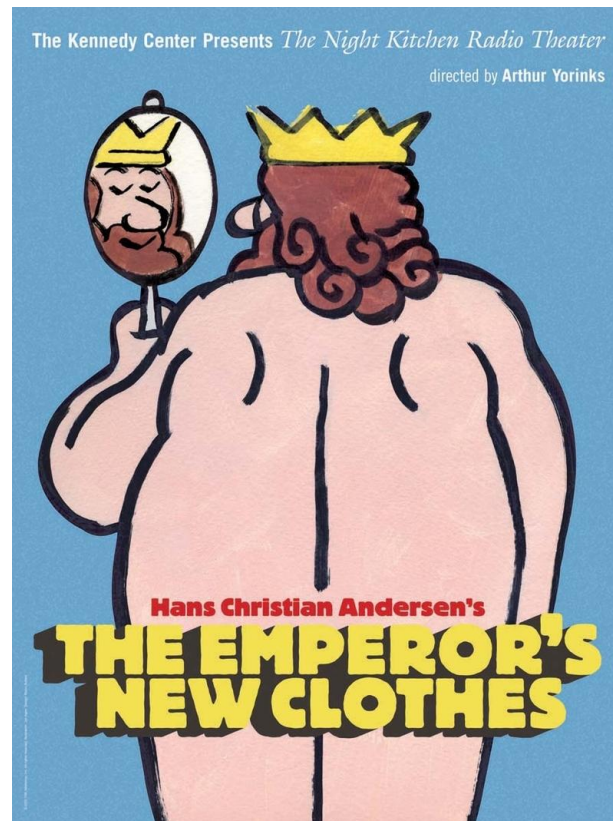


# EDRMS



Or

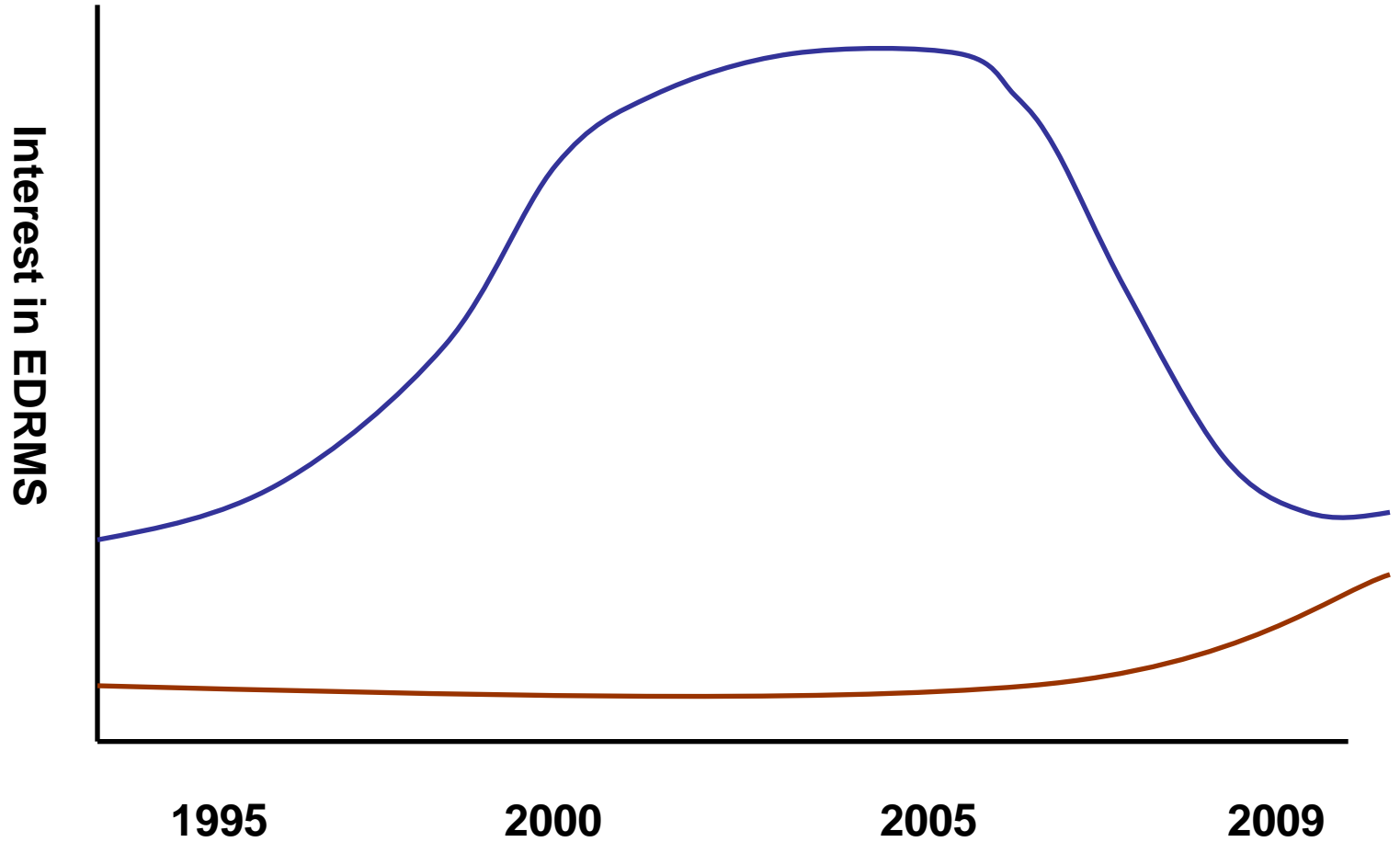


good practice  
& innovation

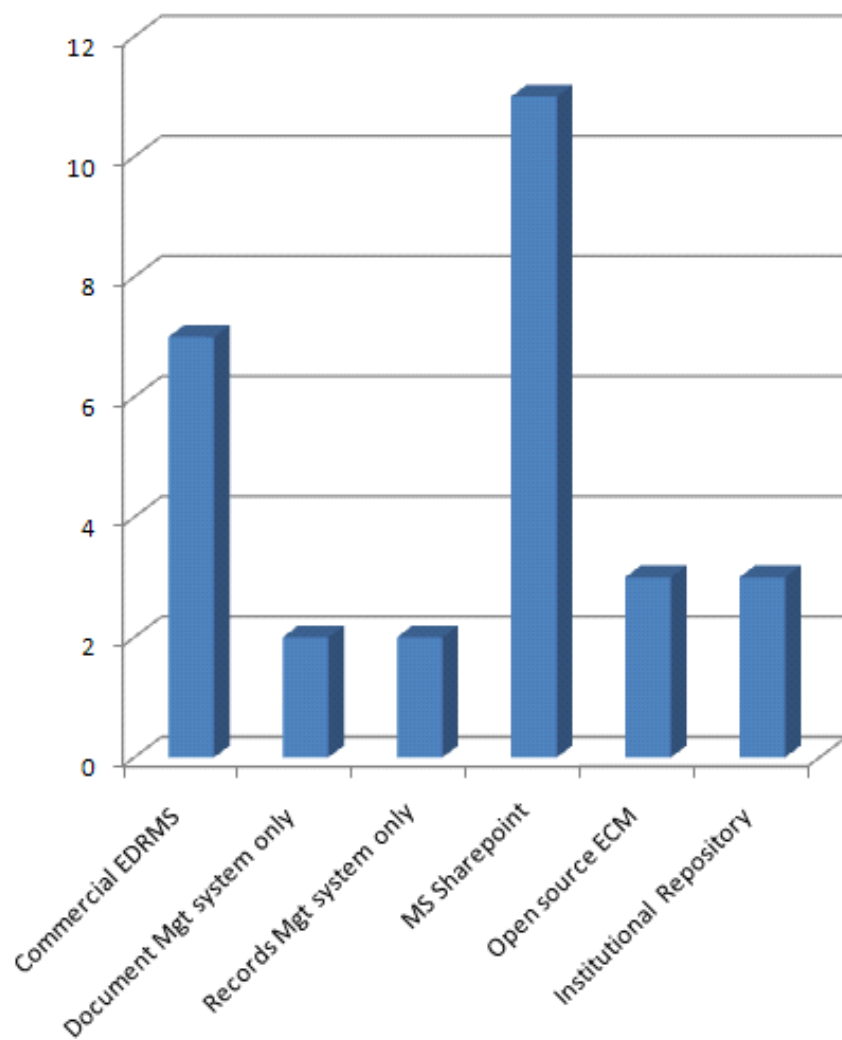
# Purpose

- To look beyond the ‘amazing technicolour’ of the theory and look at the practicalities
- Forget the hype – what will it mean in practice
- To encourage you to ask yourself the right questions
- *Not* to tell you whether it’s a good idea or not

# An (unofficial) timeline



### Q10. Which of the following types of solution would you consider?



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& innovation

# The end of the 'lets keep everything' age?

***“For what it's worth, I can tell you that in my 20 years in this industry, by far the best bang for buck project activity I encounter, is the clearing out of junk content/data from file servers, databases, and tier 1 storage. It may not be pretty or exciting, but it delivers results fast.”***



**Alan Pelz-Sharpe**

# Back to EDRMS... or should that be...



“Enterprise Content Management (ECM)”

# ECM does appear to be the goal for many

Q13. Who are / will be the regular users of this system?



- All staff who create / use documents and records across the institution
- Specified staff across the institution (e.g. departmental administrators)
- Central Records Management staff only

# Time for a sanity check

- As an 'ECM System' this represents one of the biggest IT projects your institution will ever embark upon
- Implementation costs of several £million?
- Ongoing costs of several £10K per annum
- Will dominate your working day forever more
- Will change the way every member of staff works

**Worth asking vendors and yourself an awkward question or two first...**

## Some (awkward?) questions

**What are your motivations for wanting an EDRM?**

**What is the scope of the project going to be?**

**How do your users feel about it?**

**Have you considered the true costs, and will you ever achieve an ROI?**

# Motivations

## Straw poll

We are going to implement an EDRM/ECM because...

- Senior management have identified the need for one
- Our IT strategy has identified the need for one
- Administrative staff have identified the need for one
- Academic staff have identified the need for one
- It will solve our most pressing information/records management/compliance issues
- A consultant/vendor has said we need one
- Everyone else seems to want one/be getting one

## Motivations

### Compliance

- Yes, it is vital to have control over your information, but...
  - Request numbers are low (3.6 per month)
  - Would need to be *enterprise-wide*
  - Remember it's a Freedom of *Information Act*

### Strategic Objectives

- What are your institution's real strategic priorities?
- Will an EDRM really make a cost-effective contribution to achieving them?
- Take a look at Espida...

# Scope

## Straw poll

How many of your institutions are planning or implementing...

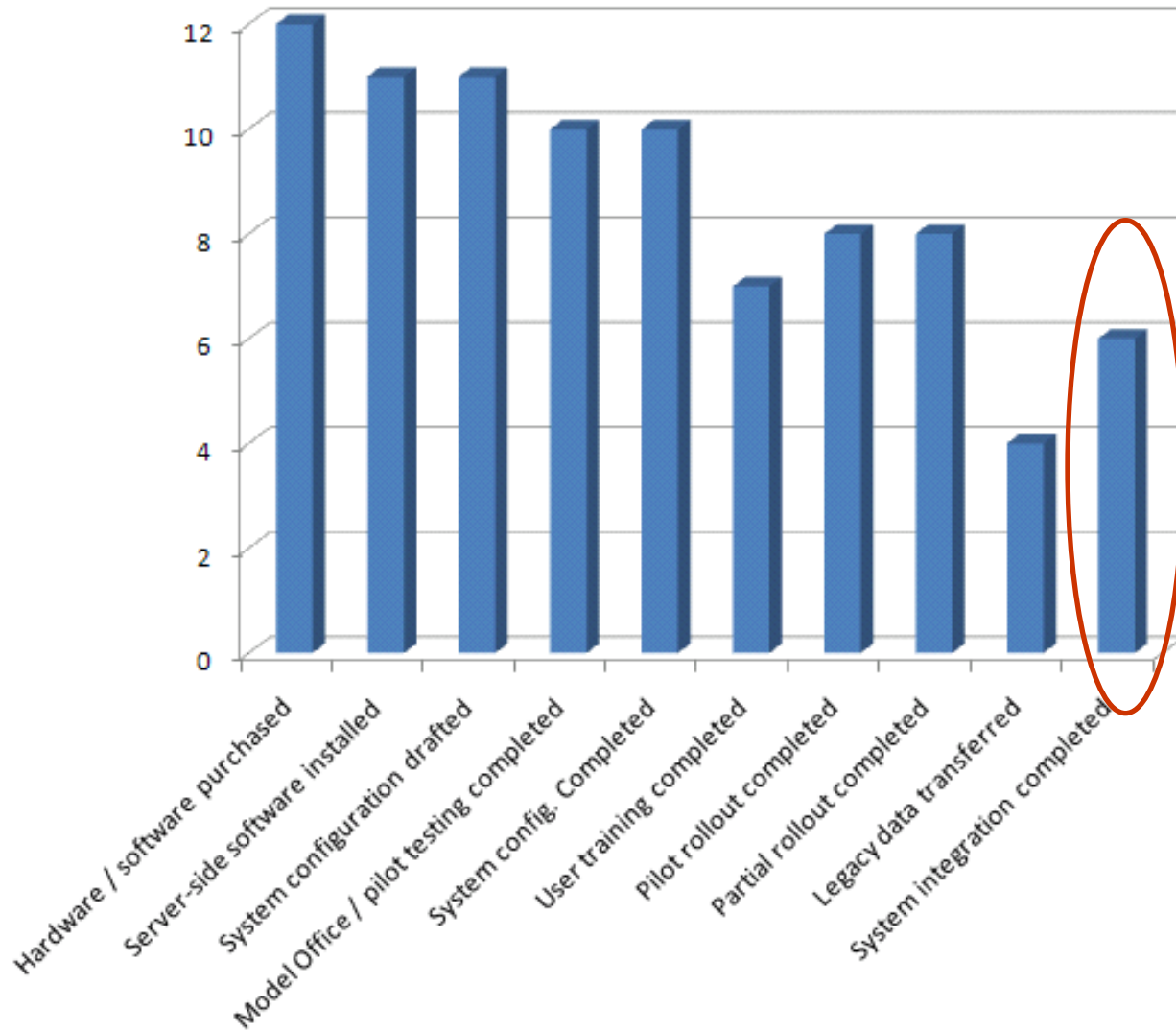
- an institutional repository
- a new web content management system
- a new intranet or other collaborative tool
- Social software / Web2.0 services
- a new student records system
- a new finance system

If so...

## Scope

- Have you consulted widely enough with all relevant system owners/project teams?
- Are you clear on how your EDRM is going to integrate with these systems?
  - Technically
  - Functionally
  - Politically
- If not, what is to stop your EDRM system becoming yet another silo of information?

**Q11. How much progress have you made to date with your implementation? (please tick as many as apply)**

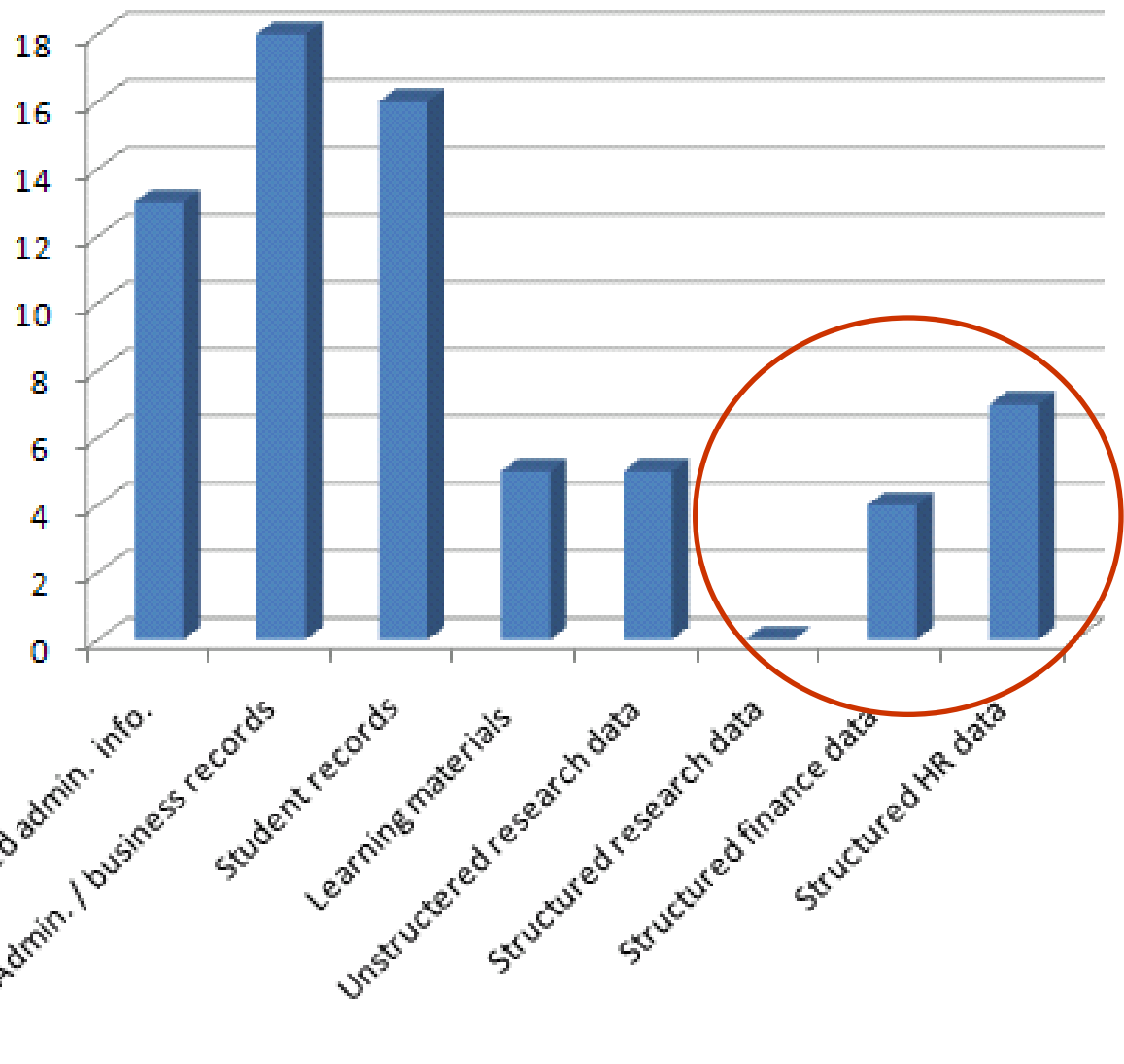


good practice  
& innovation

## Scope

- What about integration with your line of business applications?
- The lifeblood of your institution
- Contain mission-critical information and records
- Ask your Head of finance which he would rather save in a fire: his finance system, or the network drive
- Ignore them at your peril...

## Q14. Does / will the system manage any of the following?



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## Scope & Users

Okay, lets stick to documents and records for now...

- **Average of 3-4000 staff per institution**
- **Are you going to roll out to all 3-4000?**
  - Licence costs, training, support, quality control, upgrades, coronary, suicide...
- **Or are you only going to rollout to selected staff e.g. local and central admin staff?**
  - Much more manageable... but what happens to the rest
- **Your *Enterprise Content Management System* is now only managing a small percentage of the information created by an even smaller number of users**
  - But at considerable cost...
- **What about all those promises of organisation-wide retrieval & management of assets your project was founded on?**

# Users

Okay, lets assume you are eventually going to roll it out to everyone

This is going to affect the way that everyone works everyday

**HUGE** Change management challenge

## So where does this leave us?

- Forget the technology and think carefully about your requirements
- Consult as widely as possible – with an open mind
- Think carefully about the scope of your proposed system – particularly from the institutional perspective
- Be clear about what your objectives are & think carefully about how you will demonstrate success and ROI
- If in doubt, go see an institution who has achieved it already

**And draw your own conclusions if you can't find one...**

# A quick plug...



The connective power of records and information management

**3rd-4th March 2009**  
**Gateshead College Baltic Campus**

How can we ensure that records and information management continues to meet the needs of the staff who need it most?

What approaches to records and information management are currently proving successful and why?

How can we tackle some of the most challenging aspects of implementing records management systems?

How can we *prove* the benefits of what we do?

**Bookings close this Friday...**

# References

- EDRM Espida case studies
  - <http://www.jiscinfonet.ac.uk/records-management/espida>
- ERM survey results
  - <http://www.jiscinfonet.ac.uk/records-management/erm-survey/>
- Change Management infoKit
  - <http://www.jiscinfonet.ac.uk/infokits/change-management>
- Building Bridges Conference
  - <http://www.jiscinfonet.ac.uk/events/building-bridges>

Thank You

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