

ECM Implementation Strategy for State of Oregon

Rob Silverberg
Regional Services Director

Agenda



- EMC Services Overview
- Relevant Experience - Examples
- Implementation Methodology
- Typical Projects in State Government
- How to Get Started

EMC Consulting – What sets us apart



Global Reach



Methodology and Approach



Experience and Track Record

EMC Consulting CMA Practice:

- Unparalleled product knowledge
- The flexibility to meet the specific needs of the client
- The strength and backing of EMC Corporation worldwide operations
- Strong global partner relationships, plus offshore/nearshore resources
- Deep experience within all industry verticals, integrations with other vendors (SAP, Microsoft, etc.)



EPDM – ECM Project Delivery Methodology:

- Developed to meet the challenges of Enterprise Content Management program design and deployment
- A repeatable, industry-leading approach to solutions and services
- Scalable to a range of projects
- Anticipate and mitigate risk
- High quality delivery and customer satisfaction





Experience and Track record

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CMA Consulting – a history of success:

- Thousands of successful ECM projects since 2003
- 300+ big engagements in 2008
- Y/Y growth
- Industry Practices for Oil&Gas, Public Sector, Healthcare, Financial Services, and Telco



Recent and Relevant ECM Public Sector Work in the West



- County of San Diego
- City of Los Angeles
- County of Los Angeles
- Sacramento Municipal Utilities District
- State of California – Department of Corrections
- State of California – Department of Water Resources
- State of California – State Compensation Insurance Fund
- State of California – Department of Insurance
- More...

- **Community Services**
 - Program Office
 - Centralized Documentum Infrastructure
 - VM Ware
 - Redaction (Brava)
 - Enterprise Foundation Standards
- **Department of Human Resources**
 - File Room Imaging Backfile Conversion
 - Job Applications Workflow
 - Application Distribution Workflow
 - Executive Files
- **Department of Planning and Land Use**
 - Kiva Permitting Integration
 - GIS - ESRI Integration
 - Accela Integration
- **Department of Environmental Health**
 - Kiva Permitting Integration
 - Web Publishing
 - Document Management
 - Events Permitting Process
- **Department of Public Works**
 - Survey Records System
- **Chief Administrators Office (CAO)**
 - Admin Manual (web publishing)
- **Purchasing and Contracting (P&C)**
 - Contracts Management
- **Health and Human Services (HHSA)**
 - CALWIN integration and imaging
 - Aging and Independence Services –Imaging
- **Media and Public Relations**
 - Digital Asset Management
 - County Internet
 - Enterprise Web Publishing Automation
- **Records Department**
 - Records Manager Module (paper records)
 - Iron Mountain Integration
- **Auditor and Controller**
 - Budget Book
 - On-line grant applications (Adobe Forms)
- **Assessor Recorder**
 - High volume Imaging
- **Clerk of the Board**
 - Cyberdocs replacement
 - Board Agenda Management
- **Housing and Community Development (HCD)**
 - Rental Assistance (Imaging-Case Management)
- **County Counsel**
 - Personnel and Confidential files

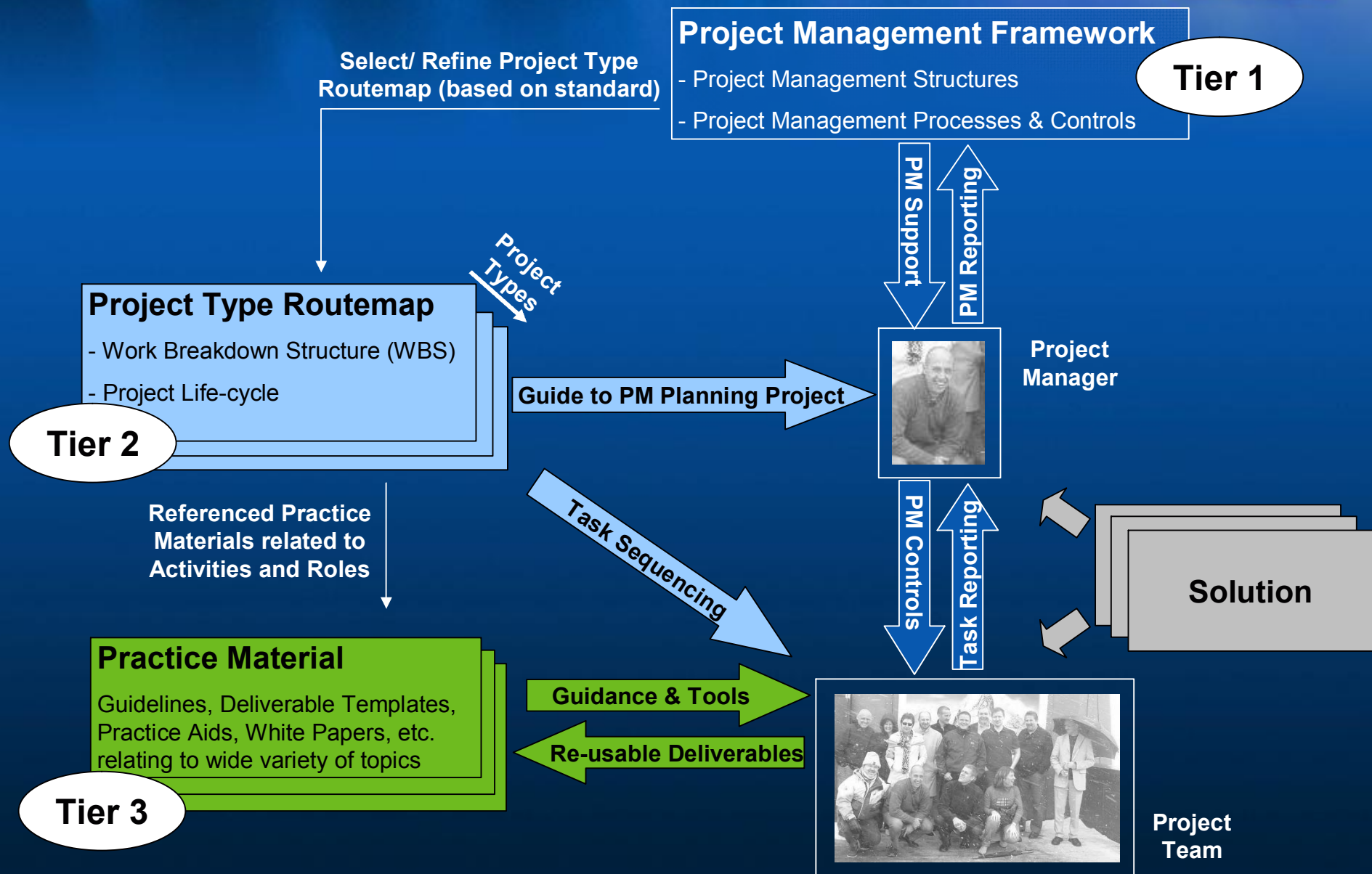
City of Los Angeles – Enterprise Deployment



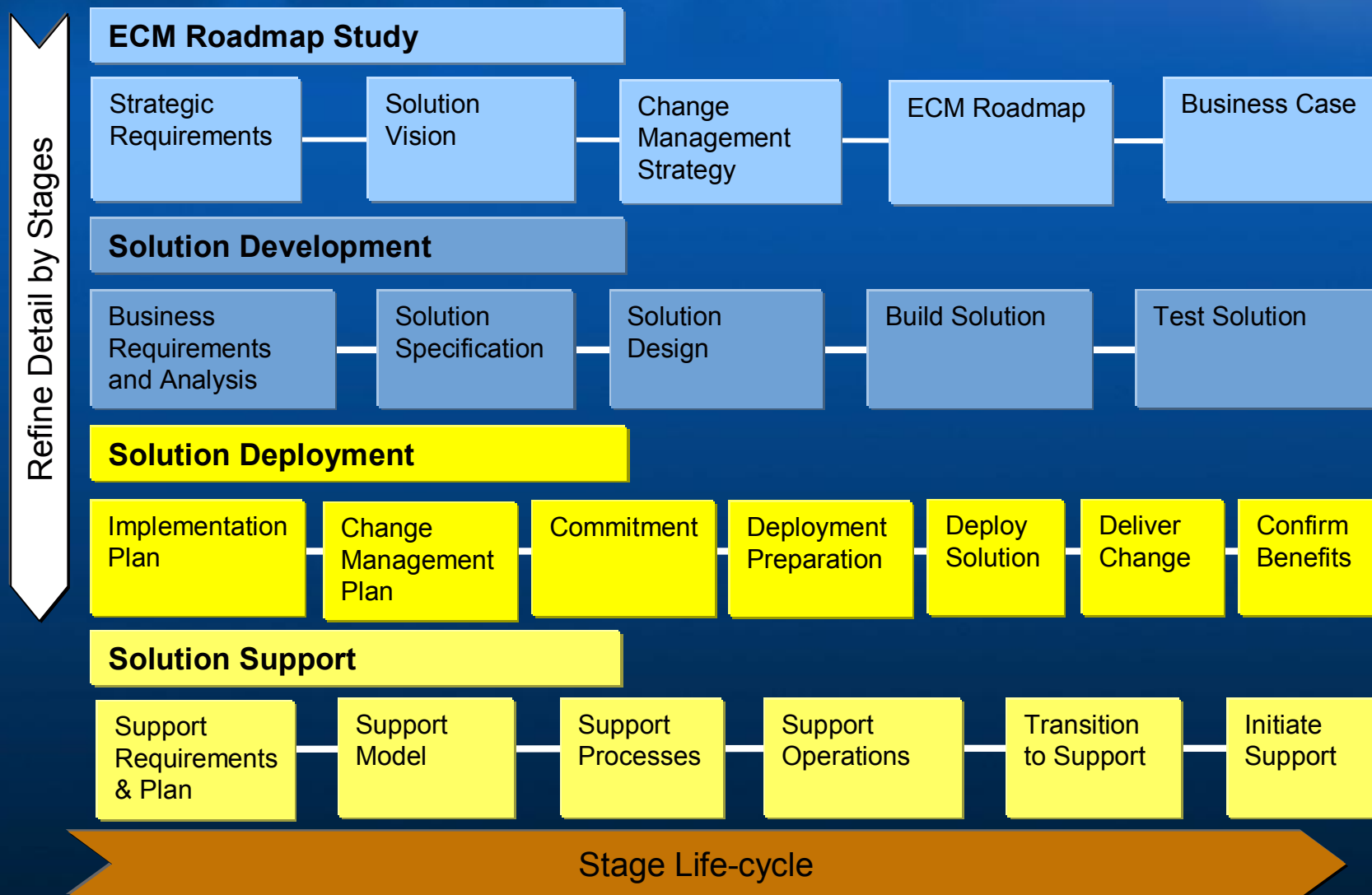
- **Information Technologies Agency (ITA)**
 - Program Office
 - Centralized Documentum Infrastructure
- **Los Angeles Police Department (LAPD)**
 - FileNet Conversion for 60,000,000 case files
- **Bureau of Sanitation (BOS)**
 - Enterprise ECM
 - Plant Management
- **Bureau of Engineering (BOE)**
 - Engineering Drawing Management
 - Collaboration
- **Bureau of Street Lighting (BOSL)**
 - Imaging of aging drawings and records
- **Cable Franchise Division (CFD)**
 - Correspondence Management
- **Department of Personnel**
 - Background Checks – Case Management
- **Department of Fire and Police Pensions (DFPP)**
 - Enterprise ECM – Process Improvement
- **Department of Finance**
 - Imaging and Doc Management
- **City Attorney**
 - SoftSolutions Replacement
- **City Clerk**
 - Records Management
- **City Controller**
 - AP Integration
- **Department of Transportation (DOT)**
 - Work Orders Process
- **Ethics Commission (EC)**
 - SEI Doc Mgmt
- **Workers Compensation**
 - FileNet Conversion
- **Treasury Department**
- **Port of Los Angeles**
 - Environmental Management
 - Permit Process
- **Los Angeles World Airports**
 - Process Automation

ECM Project Delivery Methodology

- Structure of EPDM



Principal Project Types (EPDM Tier 2)



EPDM Tier 3 – Practice Materials

Maturity Level	Creation & re-use of content	Filing & description of content	Managing the full life-cycle of content	Business process support and integration	Publishing content or sharing with partners
7	Dynamic rule-based assembly of content	Rich descriptive meta-data e.g. ISO2788 or semantic web	Information life-cycle management & business value	Dynamically configured & rule-based process control	Dynamic exchange of content & data with customers & partners
6	Granular mark-up and re-use	Controlled vocabularies	Records Management Policies enforced with system support	Business process integration & monitoring	Ability to assemble & publish content dynamically to clients/ partners
5	Compound document management	Flexible & scalable indexing	Life-cycles defined according to document types	Common processes analysed & managed	Ability to manage & publish granular / trusted content
4	Document templates and basic assembly process	Standard index across departments/ functions	Check-in and check-out used throughout life-cycle	Some processes analysed and workflow adopted	Ability to devolve ability to publish documents
3	Using templates for authoring	Departmental register of physical & electronic documents	Basic file locking mechanisms used for archiving	Using ad hoc workflow	Ability to publish documents to a static site
2	Common authoring tools	Standard file-plans	Basic (manual) policies published	Ad hoc processes such as email and attachments	Printed standards. Reliant on in-house or external publishing function
1	Variable authoring tools	Ad hoc foldering. No consistency.	No policies.	No integration. No common processes.	Multiple sources and silos of content - recreated or manually copied many times.

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As taken from Section 7.8 “ECM Maturity Model” of the EPDM Quick Reference Guide (ECM Project Delivery Methodology).

Current maturity

Short–Medium term vision

Longer Term Vision

Typical Project Timeline – Waterfall Methodology



Requirements

Requirements Workshops

Design

Design Reviews

Development

UI Reviews

Test

Unit Test, IST

Training

Hands On Training Class

UAT

User Acceptance Test

Deployment

Production Launch

Support

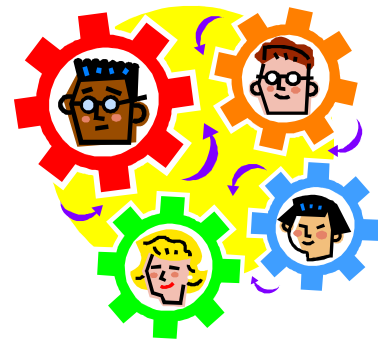
Help Desk, Resolve Issues

Project Timeline



Typical Projects in State and Local Government

- 2 Primary types of Projects that Show Value
 - Process Centric
 - Data or Content Centric
- Process Centric (Process Improvement)
 - Case Management
 - Permitting – Authorization approval processes
 - RFI – RFP Processes
 - Board Agenda Management
 - Correspondence Management
 - Web Publishing – Information Distribution Processes
 - More...
- Data / Content Centric (Store, Manage, ease of Retrieval)
 - Store and Retrieve Scenarios
 - Day Forward Scanning / Electronic Inputs
 - File Room Scanning – Backfile Conversion
 - Records Retention
 - Data Loss Prevention (Fire, Flood, etc)



How to Get Started - ECM Needs Assessment



- Enterprise Content Management Needs Assessment
 - EMC Solutions Architect
- Includes:
 - Strategic Requirements Workshops
 - Current State Assessment
 - Future Vision
 - High Level Roadmap
 - High Level Requirements Document
 - Project Scope Definition (what is in scope - what is not in scope – project phasing recommendations)
 - Software Components Required
 - Budgetary Estimate for the delivery of the proposed Project
 - Project Benefits/Results and ROI justification for the project
- Typical Cost - \$30K
 - Cost will vary depending on the number of departments involved and the breadth of requirements assessed.
- **Reduced Cost until end of 2009 - \$20K**

- **Business benefits through solutions & applications**
 - Enable our clients realize business efficiencies, cost savings, rapid ROI and increased profitability
- **Talent that’s “Been there, done it, fixed it and launched it..”**
 - Credibility
- **Expertise (8+ years on avg) in Content Management**
 - True experts, not just smart people
- **Assets (accelerators)**
 - Ability to leverage our experience to accelerate the engagement



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