



10 steps to implement a EDMS

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Introduction

In today's business processes, information plays a key role. Information is used to steer business processes and to provide people the information and instructions to do their job. Most of our information is kept in documents and it is very important that documents are well managed and that they are available to the right people at the right time. A Document Management System is therefore crucial to steer business processes and to ensure that people have access to the right information; whenever they want and wherever they are.

Since Document Management Systems are closely related to business processes, a Document Management System should not be implemented overnight. An organization needs to be well prepared and needs to understand their requirements, scope and objectives to successfully implement a Document Management Solution. This white paper describes 10 steps to a successful implementation of a (Electronic) Document Management System.

Step 01

Assign a project champion

To implement a successful project, it needs to be supported by the full organization. The best way to manage this is to assign a project champion that knows your organization, understands your business processes and is capable of getting and keeping the various people and disciplines on board. Your project champion will be the engine for your project and will see to it that your project keeps momentum.



Step 02

Get management support

Next to having a project champion, it is very important to have your management supporting the project. An EDMS implementation is directly related to the business and involves many of your disciplines. As a result, people and disciplines need to team up, which requires the support of your (senior) management.

Step 03

Prepare yourself

A successful project starts with proper preparations. You need to well understand what you are up to and what you want to achieve. It is important to properly define your scope, objectives and time frame. Define the success of your project and create a business case that secures your budget and determines your potential cost savings.

Step 04

Take a step by step approach

Many implementations have failed or largely exceeded budget because companies wanted to do too much too soon. Document management is related to your business processes, so you need to fully understand the impact of an EDMS implementation on your business and organization.

Business processes can be complex and it is possible that users respond different to a document management implementation than expected. Therefore it is best to take a step by step approach. By defining small steps with clear milestones, you are better able to oversee what you are doing, are able to control and manage the process, and give users time to adjust to the new situation. Furthermore you can easily evaluate each step and make any adjustments needed without the risk of a big setback. With a step by step approach you manage and control your implementation process and achieve the right results. It is more important to properly evaluate all functionality, than to evaluate all functionality at once!



Step 05

Define your requirements

Draw up your blue print

To implement a system that really supports your business and users, you need to understand your requirements. Therefore you need to analyze your documents and document processes and you need to talk to various users from various disciplines to understand how they work with documents and how documents steer their tasks.

It is best to start at a business level by describing your requirements from a business perspective, without being influenced by technical (im)possibilities. As a next step, describe your functional and detailed requirements and specifications. Together, your business and functional requirements form the blue print for your EDMS.

Some of the topics you should describe in your requirements are:

- Your document processes:
 - Document creation;
 - Document approval & review;
 - Document revision;
 - Reference file management;
 - Document distribution;
 - Your documents (quantity, internal, external, etc.);
 - Your document types (Office, Pdf, Email);
- Your document (and project) structure;
- Your document properties (metadata);
- Your users and groups, including roles and rights.

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Step 05

continued



To better clarify your business and document processes, it can be very useful to create process flowcharts. Since most people are visually oriented, a process flowchart can be very illustrative.

Work from a best practice

If you are unable or having difficulties to draw up your blue print, a good alternative is to work from a best practice example that reflects how similar companies have setup their engineering document management environment. You can use a best practice to learn from it and either adopt it or further adjust it to your needs. Many organizations have benefit from best practices, helping them to (better) understand their own requirements and to have a quick start in their implementation.

Step 06



Start a pilot

It is highly recommended to start with a pilot project or Proof of Concept (POC). The advantage is that you gain experience, understand the impact of a document management implementation, and better understand your requirements. Furthermore you can better evaluate your first steps and make any adjustments needed.

A pilot project should comprise only a defined part of your company and business, for instance a defined project or department. Do not include too many users, documents, document types, document flows, etc. at once, but focus on a defined pilot environment that you can easily manage and that will give you the right feedback and results to define your next step.

Step 07



Evaluate your pilot

A good evaluation of your pilot is critical to continue a successful implementation. It is very rare that companies are able to draw up their blue print first time right. Hardly anyone can oversee all aspects of a document management implementation up front, and therefore it is important to take small steps, evaluate each step and make any adjustment needed.

Don't panic if the first results of a pilot are disappointing. You will probably learn more from a pilot than you first expected. Do a proper evaluation with the users, your project team and your vendor or implementation partner, and see what needs to be done to come to the right configuration and implementation that supports your document management needs and business processes.

After a successful pilot project, your requirements are clear and you are able to define and create templates to support the further rollout of your EDMS to your organization.



Step 08

Scale up

After a successful first step you can scale up. You can scale up to more users more departments, more projects, more documents or document types, etc. How to scale up depends on your specific situation and the best way to do a step by step rollout in your organization. When scaling up, continue to take small steps to ensure a successful rollout.

Step 09

Scale up

User acceptance is critical for a successful implementation!

Make sure you provide proper training for your users. Train your users in a production environment that reflects a real life situation, so your users immediately experience the advantages and benefits of the solution. Base your training on real data and documents that have meaning to your users. When users are able to immediately work with real documents and data, they will easier accept the system.

Prepare your organization for possible changes. The introduction of an EDMS could introduce changes in working methods, or you might want to take the opportunity to make changes to existing working methods yourself. Focus on the benefits of a changed working method, so that your users will support it and not fight it.

Make sure that your users have no reason not to work with the new EDMS, for instance because they can continue to work with the old system. Also make sure that your users are properly supported in working with the new system and that they get quick and proper answers to any questions they might have.



Step 10

Foundation first, integrations next

Document management supports your primary business processes, and data and documents in your EDMS are often related to data in other management systems (e.g. ERP, PDM, CRM, etc.). Before starting to integrate your EDMS with other systems, make sure your foundation stands. To build a skyscraper, you first need to build a solid foundation! So make sure that you have a solid document management foundation, before looking into (complex) integration with other systems.

About LogicalDOC

LogicalDOC is the best choice among all document management solutions. Its intuitive interface makes it easy to use and requires no training. The combination of advanced technologies and widely accepted international standards facilitates a non-invasive integration within your environment. With LogicalDOC you will definitely solve all your document management needs.

For more informations about LogicalDOC, visit us at <http://www.logicaldoc.com>

