

Asset Management Forum

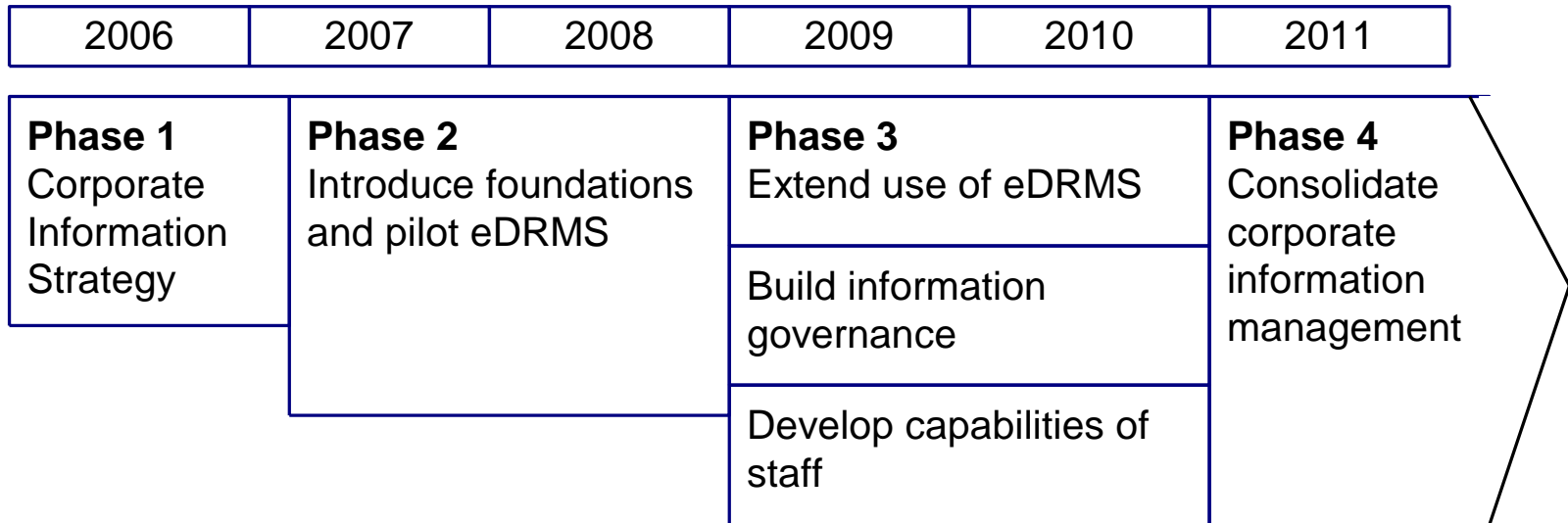
Thursday 17 January 2008

Briefing by Alec Fearon

eDRMS Project Manager

Plymouth City Council

Information Management Programme



Phase 1 developed the strategy

Phase 2 now under way

Information Management

Information Management (IM) is a general term that covers legislation, guidance and standards, referred to as **Information Governance** (IG) and the following technologies:

Document management (DM) refers to the capture or creation and initial use of documents. This can include Document Image Processing (DIP), the scanning of paper documents into electronic format.

Record management (RM) refers to the systematic management of all documents that are a record of a transaction or activity and the information or data that they contain.

Knowledge management (KM) is the creation and subsequent management of an environment that encourages knowledge to be created, shared, learned, enhanced, and organised for the benefit of the organisation and its customers.

Content management (CM) refers to the capture and publication of information, typically to an Internet or intranet website.

Data management refers to structured data, typically in a relational database system (RDBMS) and supporting a business application. Such information is often linked to a unique identifier; normally representing a specific entity such as a claimant number identifies a benefit claimant.

Scope of eDRMS Project

Information Management (IM) is a general term that covers legislation, guidance and standards, referred to as **Information Governance (IG)** and the following technologies:

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- ✓ **Record management (RM)** refers to the systematic management of all documents that are a record of a transaction or activity and the information or data that they contain.
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- ✓ **Content management (CM)** refers to the capture and publication of information, typically to an Internet or intranet website.
- ✗ **Data management** refers to structured data, typically in a relational database system (RDBMS) and supporting a business application. Such information is often linked to a unique identifier; normally representing a specific entity such as a claimant number identifies a benefit claimant.

What is records management?

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Foundation Projects

Information Audit —

Richard Woodfield

1 Information Adviser

2 more hoped for

what information?

where stored?

who uses it?

what for?

12 month timescale

Foundation Projects

Information Audit

eDRMS



Deliver core capability

Scope

- document management
- records management
- workflow
- collaboration
- web content management

Integrated with MS Office

Pilot in Planning

Rollout iaw demand

Foundation Projects

Information Audit

eDRMS

Intranet



Gerald Willis

Desktop vision

Integrated with DRM

Search and retrieve

Team workspaces

Foundation Projects

Information Audit

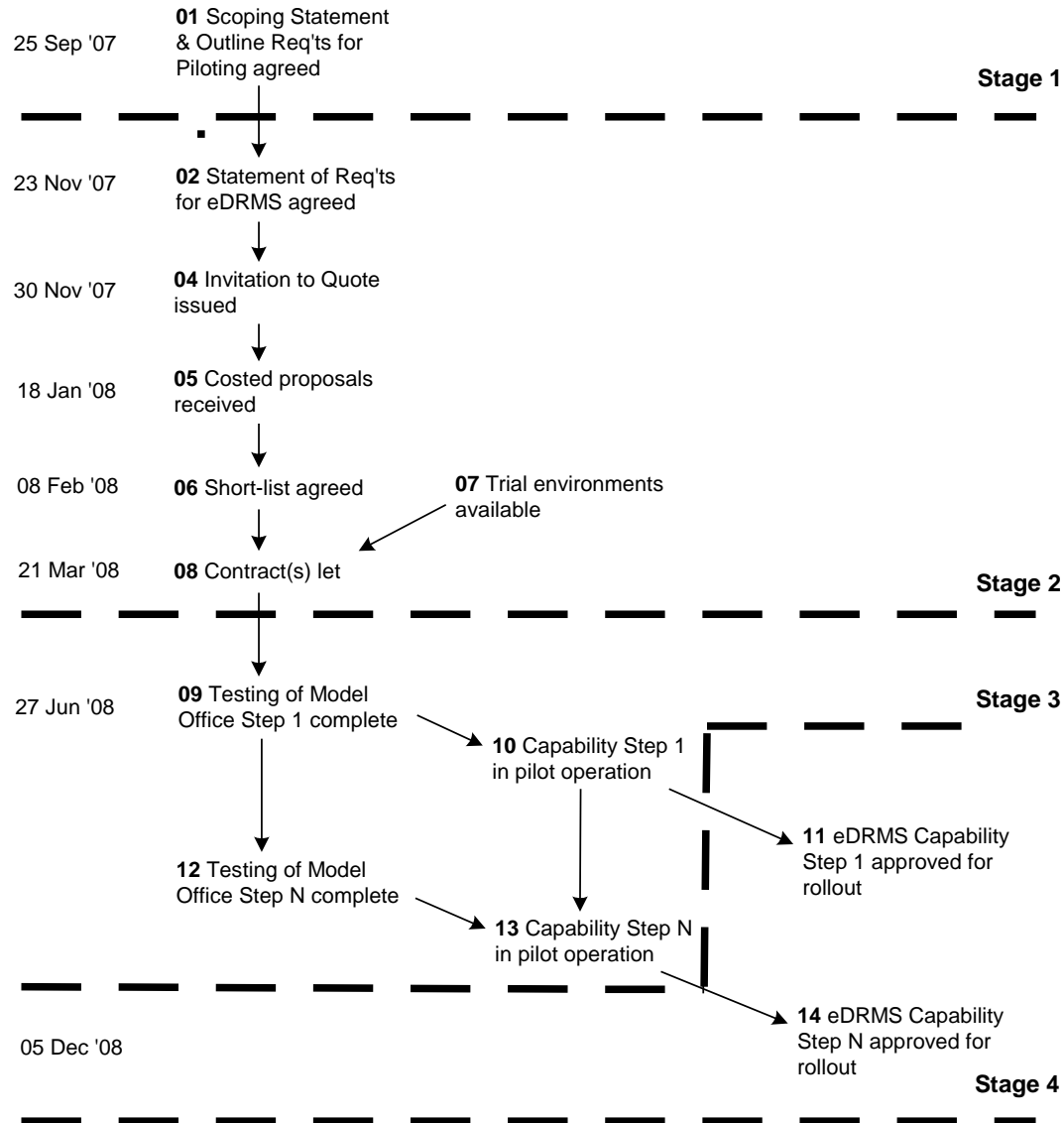
eDRMS

Intranet

 Extranet eg PFI

 Public web site

eDRMS Milestones



In 12 months time

we will know what physical information we hold;
have mapped it to storage space;
understand the requirements for its use;

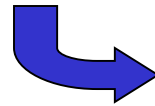
have a system able to register all documents created
and held by the Council.

.... location of all records
can be logged

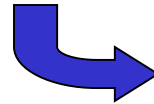
paper, artefacts, electronic

Decision by each directorate

how to handle paper records?



storage needed for
new Civic Centre



use of other buildings

considerations



availability of a records store
with - staff
- security features
transport or
scanning on demand

paperless office

If we move to a Paperless Office ...

eDRMS Project



Directorates fund

capture process &
training of staff

scaling up according
to volume

ICT advise on cost
& technical aspects

Record Storage Options

central store

non-current physical information
accessed when required

departmental
stores

criteria for deciding what
records stay in department

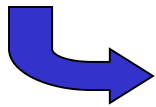
combination

what facilities required?
funding?

***Relocated PWDR0 could include
records storage facility***

Records Storage Project needed

Information
Audit



Records Storage Project

amount
location
specifications for

future storage space

***Asset Management to lead?
With ICT & Corporate Resources***

**Finally, a taste of the future ...
intranet workspace for a team**



eDRMS Project
Home

Modify My Page ▾

- Documents**
- Project Management
- Competition
- Pictures**
- Lists**
- Contacts
- Project Diary
- Discussions**
- General Discussion
- Surveys**

Project site for the eDRMS project.

Announcements ▾

Alfresco Presentations and Demos NEW 16/01/2008 16:06
 by Hele, Rich (ISD)

Some of these look quite interesting and may be worth a look...

<http://www.alfresco.com/products/presentations/>

Evaluation timetable 15/01/2008 16:31
 by Fearon, Alec (CHIEF EXECUTIVE'S DEPT)

I have put a draft timetable and description of the approach for short-listing tenders into the Evaluation folder. For discussion at the Checkpoint meeting on Friday but comments welcome before then.

[Add new announcement](#)

Project Diary ▾

Begin	Title	Location	End	Description
08/02/2008 10:00	Obtain Neville Cannon's approval of eDRMS short-list	Neville Cannon's office	08/02/2008 11:00	Richard Woodfield and Alec Fearon
01/02/2008 14:30	Brief Neville Cannon on preliminary short-list for eDRMS	Neville Cannon's office	01/02/2008 15:30	By Alec Fearon and Richard Woodfield
22/01/2008 14:00	"Alfresco in an hour" webinar.		22/01/2008 15:00	http://www.alfresco.com/about/events/2008/01/alfrescoinanhour/
18/01/2008 00:00	Information Management Strategy workshop			Paul Harris and Richard Woodfield attend workshop with Planning Advisory Service auditor.
17/01/2008 14:00	Presentation to Asset Management Forum (Alec Fearon)	Civic Centre		Outline the current approach to information audit and the implementation of edrm, the timetable for deployment of core capability and the opportunity this offers to manage paper records better and reduce their volume. Suggest options for future records storage. Propose the Forum sets up a Records Storage Project.
16/01/2008 00:00	Paul Harris in discussion with Planning Advisory Service auditor			
14/01/2008 00:00	Presentation to CMT by Richard Woodfield			CANCELLED by CMT awaiting revised date RW
09/01/2008 09:00	Alfresco deep dive demonstration	Islington Borough Council	09/01/2008 17:00	
08/01/2008 09:30	IDOX deep dive	Civic	08/01/2008 13:00	



Links ▾

Members ▾

- Brown, Vicki (CHIEF EXECUTIVE'S DEPT)
- Fearon, Alec (CHIEF EXECUTIVE'S DEPT)
- Harris, Paul (DEVELOPMENT)
- Hele, Rich (ISD)
- Richard Hele (Admin)
- Unwin, Tom (ISD)
- Willis, Gerald (CHIEF EXECUTIVE'S DEPT)
- Wilson, Ray (CHIEF EXECUTIVE'S DEPT)
- Woodfield, Richard (CHIEF EXECUTIVE'S DEPT)

[Add new member](#)

Quick Launch



eDRMS Project
Project Management
Cost Plan

Select a View

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Type	Name	Modified	Modified By	Checked Out To
	eDRMS Cost Plan	15/01/2008 10:55	Fearon, Alec (CHIEF EXECUTIVE'S DEPT)	

- View Properties
- Edit Properties
- Edit in Microsoft Office Excel
- Delete
- Check Out
- Version History
- Add to My Links
- Submit to Portal Area
- Alert Me
- Discuss
- Create Document Workspace

- Actions
- Add to My Links
 - Alert me
 - Export to spreadsheet
 - Modify settings and columns

Thank you for listening