

Choosing an EDRM Solution: Corporate Requirements or Ease of Use?

A TOWER Software White Paper

With the increase in legislation and standards over recent years concerning the implementation of electronic document and records management (EDRM) solutions, organizations today face a real challenge. When choosing an EDRM platform, should the primary focus be how well it addresses an organization's corporate requirements or how easily an organization can adopt its use?

Considering the ever-increasing flow of electronic information, maintaining a balance between the needs of the organization and those of its staff is often a daunting task. Organizations are required by law to ensure EDRM systems have the capability to apply business rules including the management and retention of both physical and electronic documents. Staff want to use a solution which is both intuitive and familiar. Of equal importance is the need for staff to complete the job they are employed to do. To discount either set of requirements is a recipe for disaster.

The requirement to meet standards such as the the Sarbanes-Oxley Act, Basel II and other governing measures cannot be ignored. After much research they have been designed to ensure:

- Authenticity
- Accountability
- Integrity
- Protection of shareholders
- Retention
- Relational links

Organizations use information to conduct business and support business processes. This information becomes the evidence of how organizations conduct their business and make decisions.

Clearly, therefore, there is a strong need for an EDRM solution that will allow the organization to fully meet its legal obligations; both as required by law, and as may be required by its internal practices. An EDRM solution that does not ensure the organization meets its obligations creates only the impression of compliance without providing the actual service needed to ensure compliance with the law.

Staff uses information to complete their business activities such as freedom of information requests, management of customer queries, and formulation of policy. Ideally, staff will be given the capability to:

- Capture and retrieve information with little effort
- Find the latest information quickly
- Find complete information on a subject
- Exceed customer and shareholder expectations



The staff's need for an EDRM solution is less clear than that of the organization. In most cases the staff have been happily doing their jobs for some time without such a solution, consequently they may not see the benefits it can offer them. To ensure staff enthusiasm for the project, management may decide to involve them in the system selection process. However, this path is a dangerous one. Staff often are more concerned with selecting a solution that will cause them minimal disruption rather than meeting organizational needs. As a wise man once stated, "Even a friend advises in his interest, not yours."

An ideal solution would enable the organization to meet all of these needs, the legislative, corporate, and individual without compromise. Inevitably, however, the system will require a level of compromise between these conflicting needs. No system that meets the individual's desire for no change will be able to meet the organization's need for systematic information management.

Over recent years there have been a number of poor corporate implementations of business applications—solutions focused on issues relating to EDRM, HR and finance. An example of this is the continual struggle to implement an improved passport and visa processing system within Immigration and National Development. As a result, a conservative approach to new corporate application implementations is becoming the norm.

In some cases this conservative approach has resulted in pursuing the path of least resistance. For EDRM solutions, the path of least resistance model centers on a 'simple' interface for staff. This often reduces training and change management issues, but at the expense of organizational, functional, and legislative requirements. Staff appear to have become the decision makers. Not surprisingly, systems which appear to have little if any impact on current work practices are sometimes selected without any regard for the requirements of the organization. The result in such cases is the implementation of a system that doesn't meet the functional needs of the organization.

The difficulty of achieving a compromise between the desires of the staff (minimizing change) and those of the organization (achieving corporate goals) cannot be underestimated. However, it is vital that corporate decision makers understand that acceding to the staff's desire for minimal change will result in a system that fails to meet both the functional needs of the organization as well as any legislative requirements.

It should be recognized that different staff have different work practices. While infrequent users will require a very simple interface, others will require greater functionality to efficiently and effectively get the job done. A good EDRM solution should accommodate different user interface requirements and ideally allow interfaces to be configured to meet specific job requirements. It is important to understand the role staff play and to note that they will have different perceptions of what is easy and what is not. Organizations should be looking for the 'Simple+' interfaces to ensure staff can complete their work in a timely manner.

A common mistake is to assume that the system needs to be as simple as possible to ensure wide-scale use. However, while the staff may use a simple system frequently at the beginning of a project, as time passes and they begin to understand the potential benefits, they often become frustrated with the limitations of a simple system. Eventually staff will come to see a simple system as more hindrance than help, and as such they will cease to use it.

This mistake can only be avoided with a sufficiently flexible system that allows for the simplest interface for some staff, but can be easily modified and adapted to provide greater functionality for others. The ease with which the system can be adapted is an important factor. If it is too difficult, complicated, or expensive to adapt the system to different requirements, then the solution's implementation will ultimately fail.

When selecting a corporate system it is extremely important to ensure that the system meets the overall needs of the organization. While staff may change, organizations are likely to be more stable. Therefore, choosing a solution that contributes to long-term viability is paramount. Organizations need also to consider the longevity of solution. When selecting an application it is important to consider likely future requirements. A solution that allows an organization to grow into it should be viewed more favorably.

The implementation of a new EDRM solution will involve some change. The complexity of this change will vary from organization to organization and from staff member to staff member. For many staff, change may simply be in the way their email system interacts with the EDRM solution. For others in more legislatively obligated areas (i.e. Freedom of Information requests) may find there is a significant change to their working practices. However, ultimately they should find that the change empowers them to be more efficient and effective.

So...when choosing an EDRM platform, should the primary focus be how well it addresses an organization's corporate requirements or how easily an organization can adopt its use?

The answer is...both.

About TOWER Software

TOWER Software, a leading enterprise content management (ECM) provider, delivers electronic document and records management (EDRM) solutions. TOWER Software's award-winning solutions empower organizations to manage and secure their vital information assets. The TRIM Context® solution is a single, integrated platform that manages business information throughout its complete lifecycle. By relying on its proven domain expertise, strong strategic partnerships, and powerful solutions, TOWER Software enables organizations to improve the accuracy of information on which business decisions are made; maximize efficiency by finding business critical information more quickly and easily; and achieve and maintain standards compliance across industries, resulting in sustained competitive advantage. TOWER Software is a privately held company with operations in North America, Europe and Asia-Pacific. For more information, visit www.towersoft.com.



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