



ECM Lite In The Federal Government Russell Stalters



The Gilbane Conference on
Content Technologies for
Government

Sunday, 0800...

Senator – “I need that by noon today before *Meet The Press*”



My Goal...

To help you understand the types of business scenarios best addressed with “ECM Lite” or “Basic ECM”, so you can quickly realize the benefits of these solutions at a fraction of the typical implementation costs.



How to Leverage ECM Lite

- ▶ What's the difference? ECM vs. ECM Lite
 - ▶ Examples of business scenarios best addressed by ECM Lite
 - ▶ What does the future hold for ECM Lite?
- 

ECM vs. ECM Lite



ECM vs. ECM Lite



Document
management

Records
management

Imaging

Web content
management

Document-
centric
collaboration

Workflow

ECM vs. ECM Lite



Document
management

Records
management

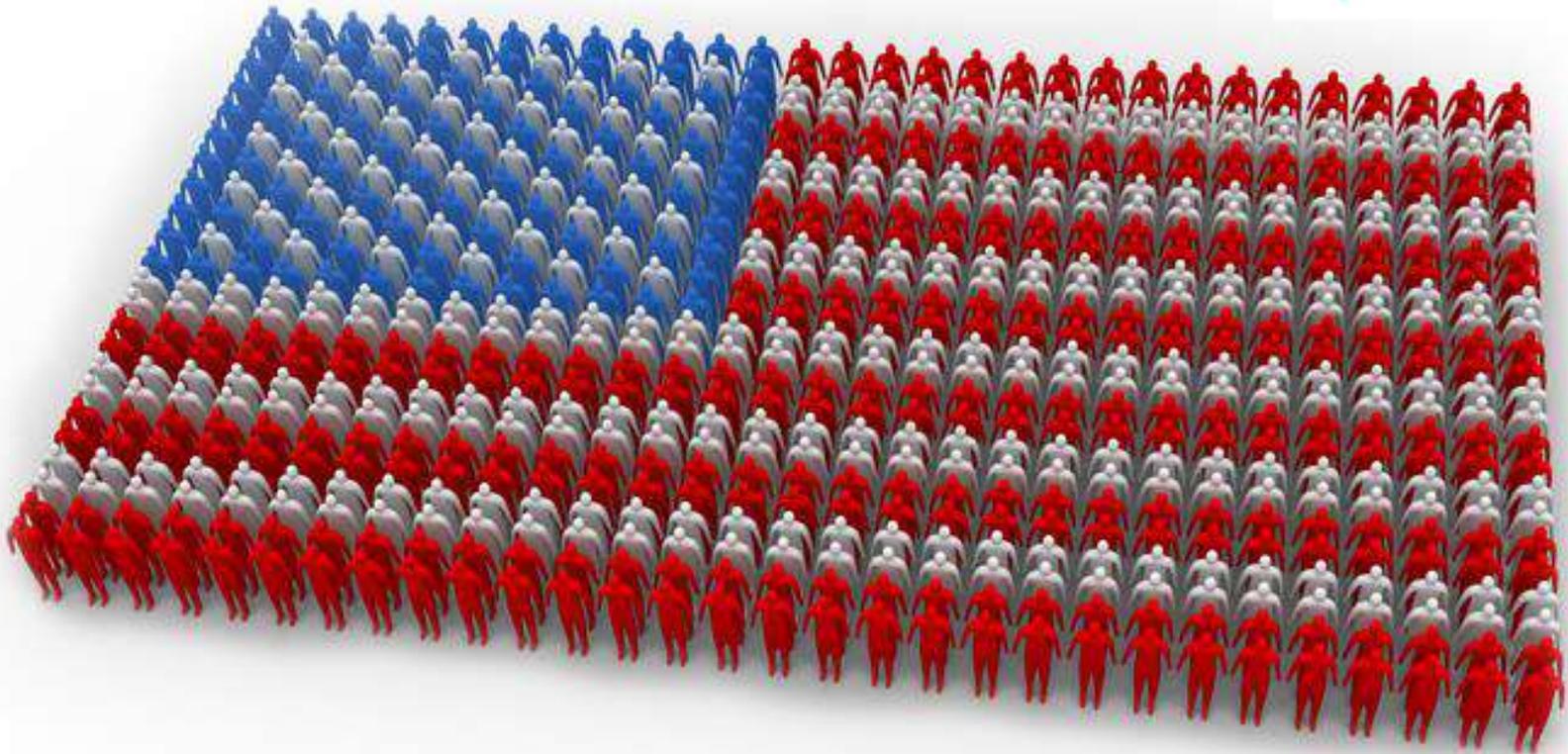
Imaging

Web content
management
??

Document-
centric
collaboration

Workflow??

ECM vs. ECM Lite



ECM vs. ECM Lite



ECM vs. ECM Lite



Best ECM Lite Scenarios

- ▶ Collaborative document creation
- ▶ Document review and approval
- ▶ Content search & reuse
- ▶ Replacing File Shares
- ▶ To eliminate Email for document routing & workflow

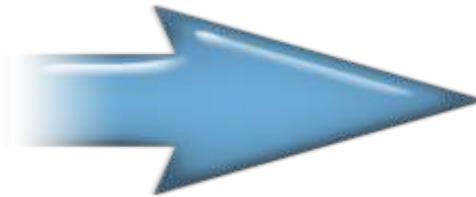


Two Examples of ECM Lite In Action

- ▶ USMC Congressional Testimony Preparation
 - ▶ IRS Policy & Manual Review and Approval
- 



Congressional Testimony



Key Capabilities

- ▶ Supports preparation of annual testimony before Congress
 - ▶ Accessible within distributed organization
 - ▶ Secure control of testimony briefing papers
 - ▶ Keeps everyone working on the latest document
 - ▶ Full text searchable
- 

Online Access to Reference Papers

The screenshot displays a Microsoft Internet Explorer browser window with the address bar showing the URL: <http://ehqmc.hqmc.usmc.smil.mil/sites/CMC/FY%202006%20Congressional%20Testimony%20Prep/Forms/Review%20Complete.aspx>. The browser title is "FY 2006 Congressional Testimony Prep - Microsoft Internet Explorer".

The web page features a navigation menu with "Home", "Documents and Lists", "Create", "Site Settings", and "Help". A search bar is located in the top right corner. The main content area is titled "CMC FY 2006 Congressional Testimony Prep" and includes a "Select a View" sidebar with options: "All Documents", "Explorer View", "Review Complete", and "Actions".

The "Review Complete" view displays a table of documents:

Type	Name	Modified	Checked Out To	Review Complete
	Manning Levels Report!NEW	6/12/2006 8:04 AM		No
	Armor Retrofitting Program!NEW	6/12/2006 8:06 AM		Yes
	PACRIM Staffing Level Report!NEW	6/12/2006 8:06 AM		Yes

Below the table, a document preview window is open for "PACRIM%20Staffing%20Level%20Report[1].doc - WordPad". The preview shows the following text:

of specific offsets, the study was not able to determine the precise negative effects of these offsets.

Converting the majority of the Preparedness Office staff to RC positions would not only generate cost savings, but would also enhance the office's ability to respond to disasters. Because the RC has so much experience with disaster response efforts, increasing the number of staff personnel in the Preparedness Office familiar with these skills is likely to strengthen the office's ability to coordinate effectively with RC units charged with implementing disaster response missions. Because this conversion had significant, though relatively small-scale, potential benefits, the study recommended the Air Force consider including this initiative in its Program Objective Memorandum (POM). If the Air Force does not include the initiative in its POM, the Department will consider the initiative for implementation in the summer Program Review.

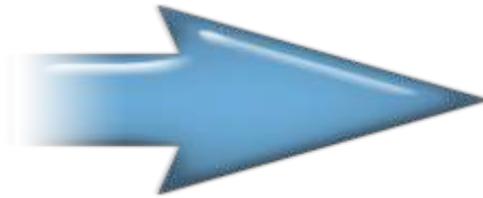
Transfer Alaska Regional Operations Control Center to Air National Guard. The Air Force has successfully transferred responsibility for two regional operations control centers (ROCC) from the AC to the RC. The study examined whether the Alaska ROCC, the third center of this type, also should be transferred to the RC. The Alaska ROCC is currently manned by 57 active duty officers and 311 active enlisted personnel. Using the same conversion process that was applied to the two other ROCCs, transferring the Alaska facility from the Air Force to the Air National Guard would require staffing the Center with 45 full-time Active Guard/Reserve (AGR) officers and 266AGR enlisted personnel. The transfer also would require 12 drilling, or part-time, officers and 45 drilling enlisted personnel. The transfer would increase manning costs by approximately

For Help, press F1



Internal Revenue Service

United States Department of the Treasury



Key Capabilities

- ▶ Support for simultaneous review
 - ▶ Everyone looking at the same document
 - ▶ Captured comments viewable by all participants
 - ▶ Status reports and visibility of review progress
- 

Change Request

Home - IRM Author Site - Microsoft Internet Explorer

Address: http://sps.k2mega.local/sites/IRMAuthor/default.aspx

Home Documents and Lists Create Site Settings Help Up to K2 Mega Portal

IRM Author Site Home

Modify Shared Page

Documents
Shared Documents
Shared Records
Pictures
Lists
Contacts
Tasks
Discussions
General Discussion
Surveys

My E-Clearance Task Items

DCR

DCR Summary and Submission

Document Type: IRM Edit

Document Number: 123.456.789

IRM Section Title: DCR Approval Document 1

Request Date: 6/12/2006 Target Completion Date: 6/15/2006

Priority: Critical

Author Name: MacInnis, Marc (IT) Telephone: (703) 123-4567 Edit

Organization: IT

Manager Name: Dawson, Jack (IT) Telephone: n/a

IMD Coordinator: Boeing, Karen (IT) Telephone: n/a

Is the document an Official Use Only document? Yes

Is the document available to the Public under the FOI Act? Yes

Is the document part of a Tax Legislation Implementation Plan? Yes

Plan: TLI 1 Edit Action Number: 654 Edit

Originating Office Reviewers	Simultaneous Reviewers	Courtesy Copy Recipients
MacInnis, Marc (IT)	Longfellow, James (Sales)	Smith, John (IT)
Dawson, Jack (IT)		Sweet, Simon (Admin)
Mahoney, Robert (Finance)		
Masters, Carol (Sales)		

Edit Edit Edit

<- Prev Next ->

Author Help

submitting a Policy Statement, Delegation Order, LEM or other type of IRM, enter the IRM section title.

When submitting other types of documents, enter the document title.

Use the first Browse tool to select the document being submitted for clearance.

- Supporting Documents
- Assign Priority and Target Completion Date
- Originating Office Contact Information
- Assignment of Originating Office Management Officials

Before an IRM can be released for review/clearance to other organizations, the IRM must be approved by the originator's management official(s). Use the Search tool to select your line manager(s) who will approve the document.

NOTE: The management officials identified in this section will be sequentially notified to review the document in the order you list them.

- Assignment of Common Simultaneous Reviewers
- Assignment of Additional Simultaneous Reviewers
- Assignment of Courtesy Copy Recipients
- Document Clearance Record Summary and Submission

Done

Unknown Zone (Mixed)

Start Home - IRM Author SL... C:\inetpub\mailroot\Mail... ACTION REQUIRED: Initi... 11:36 AM

Reporting

report_process - Microsoft Internet Explorer

Address http://localhost/lm/reports/report_document_archive.aspx?sn=456

Document Archive Report

Document Clearance Record

Priority: Critical
 Type of Document: IRM
 Additional Document Information: n/a
 Document Number: 123.456.789
 Document Title: n/a
 Available to the public under FOI Act?: true
 Official Use Only?: true
 Is this document part of a Tax Legislation Implementation plan?: true
 Additional Tax Legislation Plan Information: TaxPlanText
 Does this document affect any Internal Management Document?:
 Additional document affect information: AffectText

Originating Office

Author of Document:
 Name: MacInnis, Marc Office Symbols: Telephone Number: (703) 123-4567 Email Address:

Author's Manager:
 Manager's Name: Dawson, Jack Manager's Office Symbols: Manager's Email Address Action Action Date

Additional Sequential Management Reviewers:
 IMD/IRM Coordinator:
 Name: Boeing, Karen Office Symbols: IT Email Address Action Action Date

Review Organizations Assigned:

Author's Comment:

All Reviewer Comments:

Reviewer	Reference	Date	Comment
MacInnis, Marc	123	6/12/2006	test

Done Done Local intranet Unknown Zone (Mixed)

Start Home - IRM ... report_pro... C:\inetpub\... ACTION RE... ACTION RE... K2.net 2003... 2 Microsof... K2.net Studi... 11:51 AM

The Future of ECM Lite



ECM Lite Will Catch Up



ECM Lite Will Catch Up



The Next Generation of ECM Lite



Document
management

Records
management

Imaging

Web content
management

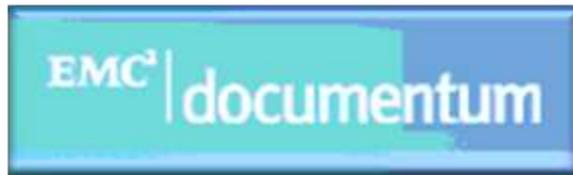
Document-
centric
collaboration

Workflow

Who Provides ECM Lite Today

ORACLE®

Microsoft®



With  **eRoom®**
Your Digital Workplace



 **Alfresco™** | The Open Source Alternative for Enterprise Content Management



Leveraging ECM Lite

- ▶ ECM vs. ECM Lite differences
 - ▶ Some business scenarios are best addressed by ECM Lite
 - ▶ The future of ECM Lite will be assured by the major infrastructure vendors
- 

ECM Lite Advantages

- ▶ Better user adoption
 - ▶ Lower deployment & training costs
 - ▶ Tends to be more customizable
 - ▶ Faster rollout
- 

Feedback

Email me:

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Visit my Blog

BetterECM.wordpress.com

Russell Stalters



Russell Stalters is cofounder and President of Compliance Solutions Group, a subsidiary of Applied Information Sciences, Inc. Compliance Solutions Group (CSG) specializes in assisting organizations implement document, records, and business process management solutions that require compliance with global content and records management standards. As recognized authorities on compliance, document, records, and workflow management, CSG brings practical experience, thought leadership and technical expertise into every engagement. Compliance projects can be delivered in weeks or months not months or years, and in a cost-effective manner with a manageable scope of work.