

GTS CASE STUDY: ELECTRONIC DOCUMENT MANAGEMENT SYSTEM (EDMS) CONSULTANCY AND PROJECT MANAGEMENT

GTS Geotech implemented an installation of Opentext Livelink in Dubai. The client was the Middle East subsidiary of a major oil company. The project was conducted in two phases: an initial requirements analysis, followed by project management of the enterprise-wide installation.

The client was conducting a 4-6 year project on behalf an Iranian oil company, bringing back into full production fields abandoned during the Iran/Iraq war. At the conclusion of the project, all assets were to be handed back to the Iranian Company, including all documentation. Payment for the project was dependent upon the client producing a full audit trail with supporting documentation in signed hard copy.

The initial brief for GTS Geotech consisted of a consultant conducting a requirements analysis for electronic document management and knowledge sharing throughout the enterprise.

Considerations included:

- A globally distributed enterprise with offices and contractor sites widely scattered.
- The need for a full auditable record, and retention of all hard copy.
- Slow and unstable communications in some sites.

The approach chosen was a user-centred one. The consultant visited project offices in different parts of the world and interviewed a wide variety of users, asking how they created, used and shared documentation. The alignment between the company's underlying business processes and the flow of documentation through the organisation was analysed, and anomalies identified. Findings of this initial consultancy phase were presented by means of a report and a presentation to management, in which a recommended course of action was outlined.

Recommendations included:

- The implementation Opentext Livelink across the enterprise, based on its Web-driven, powerful access controls, search and knowledge-sharing

features and the fact that it was already implemented in other parts of the parent company.

- That an EDM controller be appointed, and document flow procedures formalised.
- Because of the need for hard-copy retention, that a Document Centre be concurrently established, to centralise control and organisation of hard copy.

Upon completion of this initial consultancy phase, the client accepted the recommendations, and requested that GTS Geotech project manage the implementation phase. The implementation team consisted of the Geotech Project Manager; a local web design company to install and customise Livelink, and a Document Controller and IT support from the client. The Livelink software was installed on dedicated NT server, with the Oracle database on separate NT client.

Focal points were identified within the organisation to act as Livelink administrators for their departments. Taxonomy and metadata were decided on in consultation with these focal points, and document flows were constructed with the Document Controller. Opentext and a third party provided training, for all users, Administrators and Document Controllers. The software installed, structure set up, and metadata added the system was populated with 14GB of documents.

At the conclusion of the project the following deliverables had been achieved:

- Installation and customization of the Livelink EDM system.
- Loading of 14GB of documentation.
- Formalization of document flows through the organization.
- Structuring of documentation through metadata and taxonomy into an organized, user-friendly and easily navigable system, searchable from any geographic location.
- Training of all staff and alignment of job functions with the new EDM system.
- Procedures in place for the control and organization of all hard copy.

The end result was the integration of dispersed and loosely managed documentation into a single organized, structured, and user-friendly system. This allowed global but controlled access to the organization's knowledge, and provided a full audit trail of documentation to be handed over at the end of the project. It also provided a valuable resource for the eventual owners of the enterprise.