Electronic Document Management System

Joey Perry

Information Technology Manager

Jackson Energy Authority

Document Management Systems

- System used to track, manage, store, retrieve documents

- Filing cabinets
  - Drawers
  - Tabs
  - Labels
- File Servers
  - Folders
  - Files
- Email
  - Inbox
  - Folders

Challenges

- Space to Store Documents = $$$
- Limited Access to Files / Longer Retrieval Times
- Difficult to Locate Files
- Document Retention/Liability/Purging
- Digital Transformation
- Multiple Copies of Files Exist on File Servers / Inboxes

Electronic Document Management

- Computerized way to store and retrieve documents

- Advantages
  - Electronic Indexing Process
  - Streamlined Retrieval
  - Access Management
  - System Integrations
  - Effective Purge Processes
  - Automated Workflows

JEA History

- Timeline – Electronic Document Management
  - RFP Process – Summer 2013
  - Enterprise Solution – OnBase by Hyland
  - System Integrator – LBMC Technologies

- Original Goals
  - Choose Scalable System
  - Vendor for Implementation…Grow Knowledge Internally
  - Operational Resource (IT)
  - Digitize Human Resource Files
  - Automated Workflow – Employee Change Status

JEA History Continued…

- Change of Plans
  - Administration Building Flooding
  - Financial Files Damaged
  - Office Space Consolidation

- Modified Immediate Goals
  - Archive / Retrieval of Financial Documents
  - Financial System Integration for Journal Entries
  - Digitize Human Resource Files
  - Departmental System Lead (w/IT resource)

JEA History Continued…

- Other Key Accomplishments
  - Automated Workflow – Employee Change Status
  - Full Text Search Capabilities – Admin Contracts
  - Invoice Processing – Email and File Location Sweep
  - Electronic Routing and Coding of Invoices
  - Electronic Travel Authorization Form
  - Certified OnBase System Administrator – IT Apps Resource

Current EDM System Recap

- OnBase by Hyland
  - Fat Client and Web Application
  - Document Archiving and Retrieval
  - Financial System Integrations
    - Journal Entries
    - PO / Workorder Detail Retrieval
  - Email / File System Sweep
    - Vendor Invoices
  - Automated Workflows
    - Invoice Coding and Approval
    - Onboarding / Termination
    - Travel Authorization
    - Mobile Device Request
  - Dependent on Vendor
  - In-house Expertise / Support
    - Training / Certifications

Lessons Learned...

- Senior Sponsorship – System Ownership

- Employee Engagement

- Obtain In-house Knowledge / Training

- Seek Quick Wins Early

- May Not Find Enterprise Solution (may need multiple systems)

- Understand Business Needs – Create a Roadmap

Electronic Document Management System

Damian Maloney

Records Compliance / Risk Specialist

Cumberland Electric

Electronic Doc Mgmt System (EDMS)

YES

- EDMS – Applies to all employees and all organizations.

- Solution for creation, capture, indexing, storage, retrieval, and disposition of records and information.

It's how we do business.

CEMC
Cumberland Electric
Membership Corporation

CEMC History

- Timeline- Electronic Doc Mgmt System (EDMS)

  - Hired records compliance employee in 2012

  - Original primary business software IBM – AS400
    - Late 80's until 2008

  - In 2008 converted to NISC / IVUE primary software
    - Very limited document solution at that time

CEMC
Cumberland Electric
Membership Corporation

CEMC History Continued....

- 2009 First EDMS product – One stop shop.

- Very robust, cutting edge product at the time
  - Benefits – Workflows / Security / Hyperlink to Docs

  - Used primarily for storage and retrieval of:
    - Member Documents
    - AP
    - GL
    - WO

CEMC History Continued….

- Aspirations:
  - Workflows
  - Expand capture, storage, retrieval, etc.
  - Retention & Disposal

- Challenges
  - Functionality was very "Java Sensitive"
    - Support time vs Doc Mgmnt time
  - Integration w Primary Business Software
    - Features required custom work – cost analysis
  - End user efficiency and satisfaction

CEMC
Cumberland Electric
Membership Corporation

Catalysts for Change 2014-2016

- Capture of Historical Documents
  "Dead Records"

- IT Dept decision to move to O365

- Better EDM Software Options

- Budget, Budget, Budget

CEMC
Cumberland Electric
Membership Corporation

Opportunities for Improvement

- Decision – New EDM System !
- Considerations:
  - One solution?
  - Integration w existing software?
  - Security capabilities / matching existing structure?
  - Storage Space – On prem vs Cloud?
  - Experts in house or software company?
  - Features presented - out of box or custom?
  - Cost – maintenance, custom work, conversion?
  - Mobility / Access out of office?
  - Legal Retention and holds?
  - ***End user efficiency and ease of use!***

Current EDMS Structure

Two House Solution

- **NISC Document Vault** (Primary Software Add On)
  - Majority of business docs – Cust Docs, AP, GL, WO, MR,
  - Eliminates integration issues
  - End user ease of use – efficiency.
  - Expert in house.
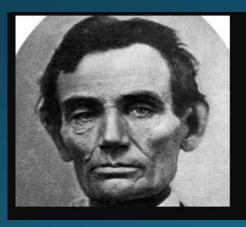 - Built in security structure and back up system

- **Microsoft Office 365**
  - Allows for in place retention of documents.
  - Multiple collaborative tools (Groups – Teams)
  - Mobility OneDrive
  - Familiarity across organizations / industries.

CEMC
Cumberland Electric
Membership Corporation

Lessons Learned…

- Get the right people involved.
  - IT, IS, Legal, End Users (Front Line & Senior Mgmt)

- Cost isn't everything.
  - A less expensive alternative may be a better organizational fit.

- Be prepared to compromise.

You can please some of the people some of the time, all of the people some of the time, some of the people all of the time, but you can never please all of the people all of the time.

Joey Perry – jperry@jaxenergy.com
Damian Maloney – dmaloney@cemc.org