# Enterprise Document Management System (EDMS)

# Tech Talk

# Agenda

- What is the EDMS and how can I use it?
- EDMS vs. Google Drive
- Migrating onto the EDMS

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What is the EDMS and how can I use it?

# GSA's EDMS gives users...

**One place to save finished documents.**
One place to securely save your documents so that they can be found and shared with others.

**One place to find documents.**
A single search for all of the documents stored in the EDMS.

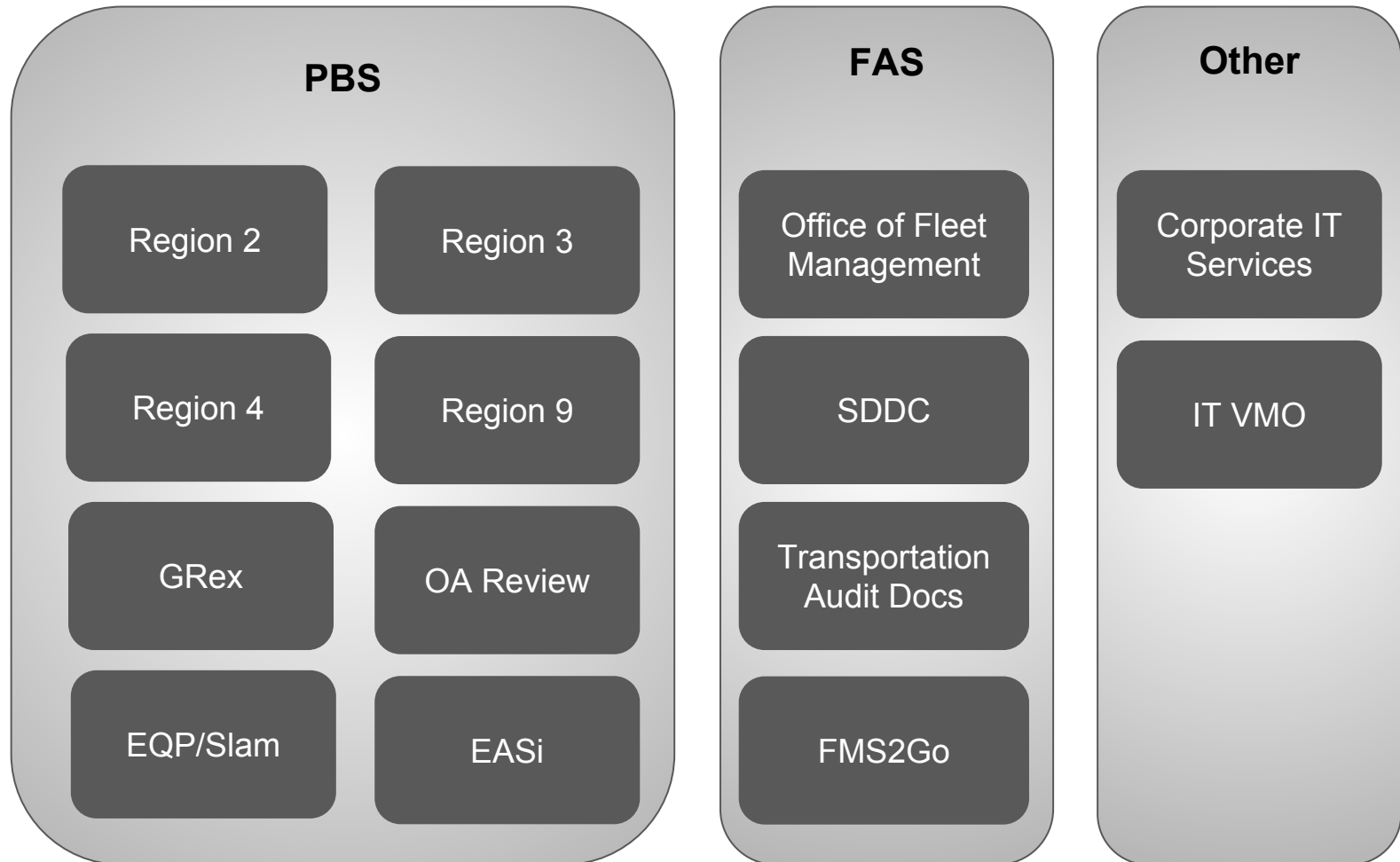**One place to manage finished documents.**
A single place where people can manage, secure and view documents. The EDMS will ensure that GSA meets the Managing Government Records Initiative (M-12-18).

**One place to share finished documents.**
A tool that can be used to securely share large documents with other GSA employees and approved partners.

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# Mature Product with Broad Usage

**PBS**

| | |
|---|---|
| Region 2 | Region 3 |
| Region 4 | Region 9 |
| GRex | OA Review |
| EQP/Slam | EASi |

**FAS**

- Office of Fleet Management
- SDDC
- Transportation Audit Docs
- FMS2Go

**Other**

- Corporate IT Services
- IT VMO

# Customizable Site Dashboards

- Site Administrators can communicate with their teams through a customizable dashboard.
- Dashboards show recent activity on the site so that users can quickly find documents they were working on.
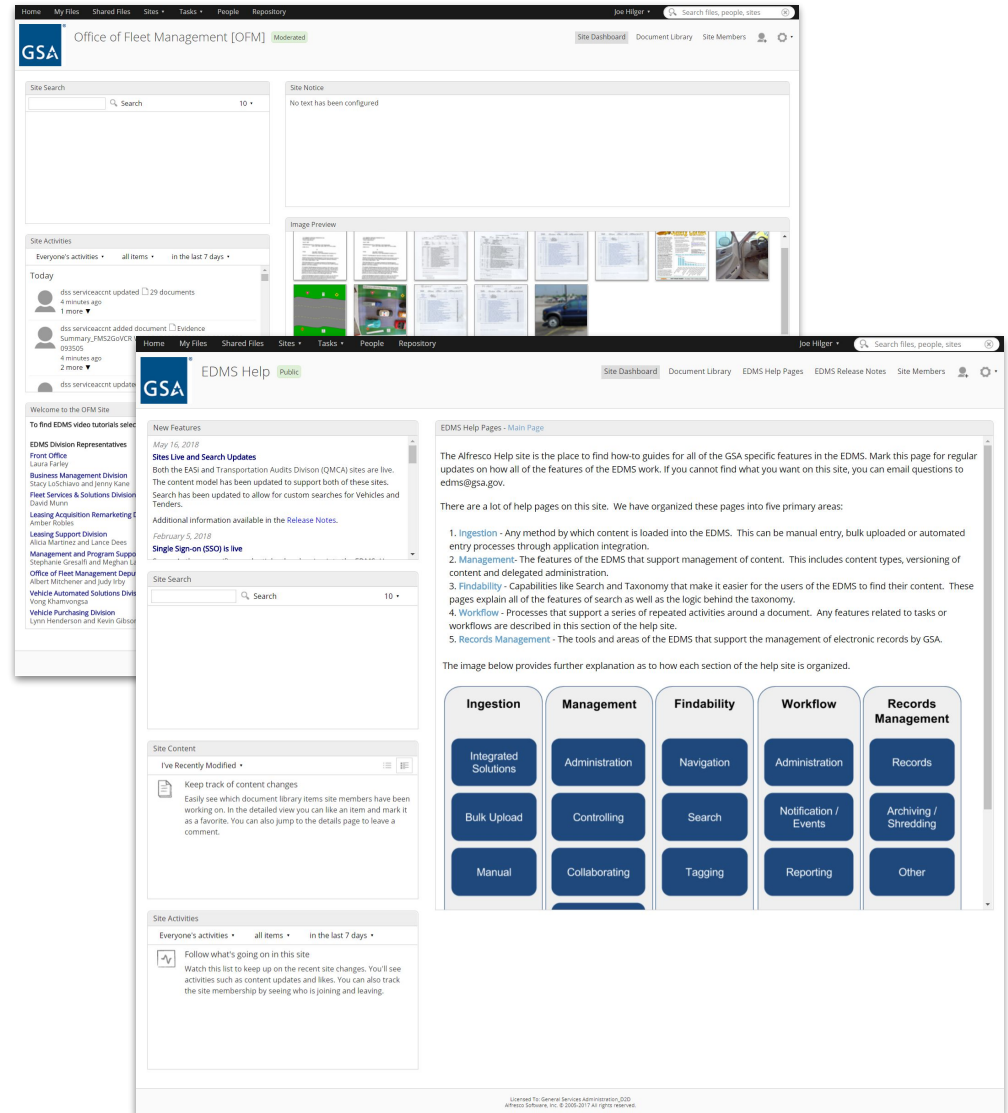
# Comprehensive Search

- Full-text search allows users to find what they are looking for.
- Search facets allow for improved findability of content.
- Hit highlighting and content previews provide context of search results.
- Document previews in search results.
- Search respects security so users only see the content they are supposed to see.

# Document Libraries

- Documents are stored in folders so that users can also navigate to their content.
- Folders allow for security to limit who has access to content at differing folder levels or structures.
- Folders may also have associated metadata so that users do not have to enter metadata on each piece of content.
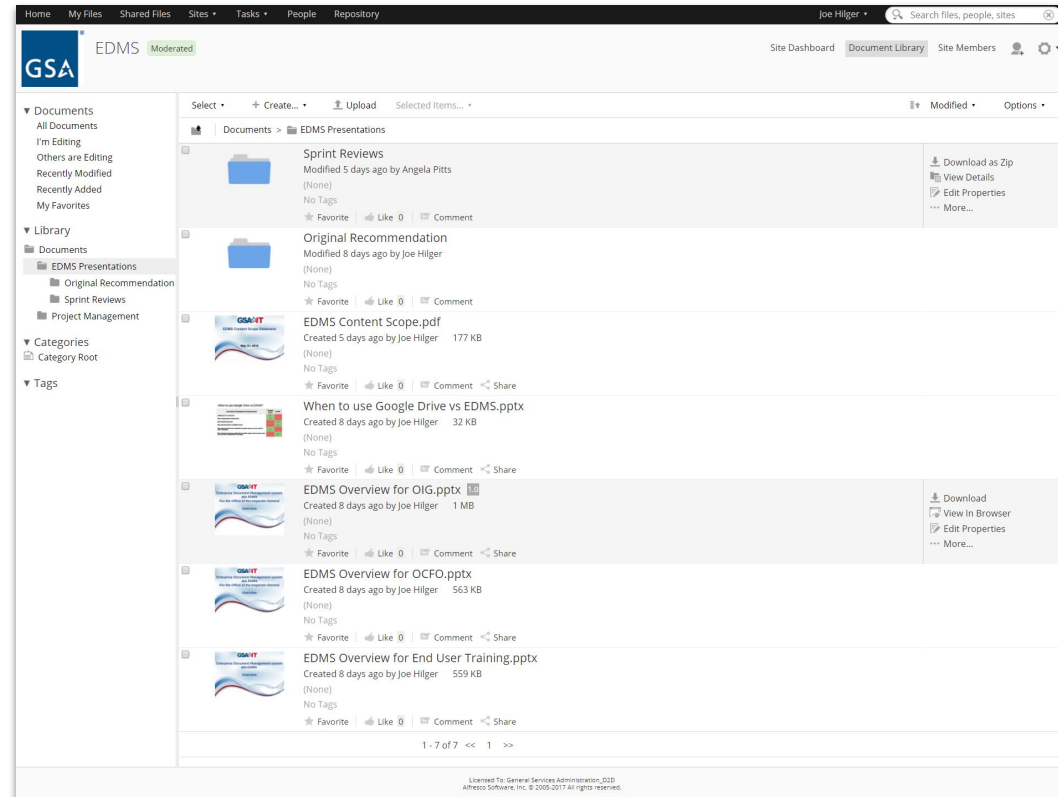
# Structured Content

- Documents have metadata that make them easier to find and manage.
- Users are able to preview standard document types (PDF, PPT, Word, Excel, etc.)
- Content is stored in a consistent way across regions and business units to improve consistency.
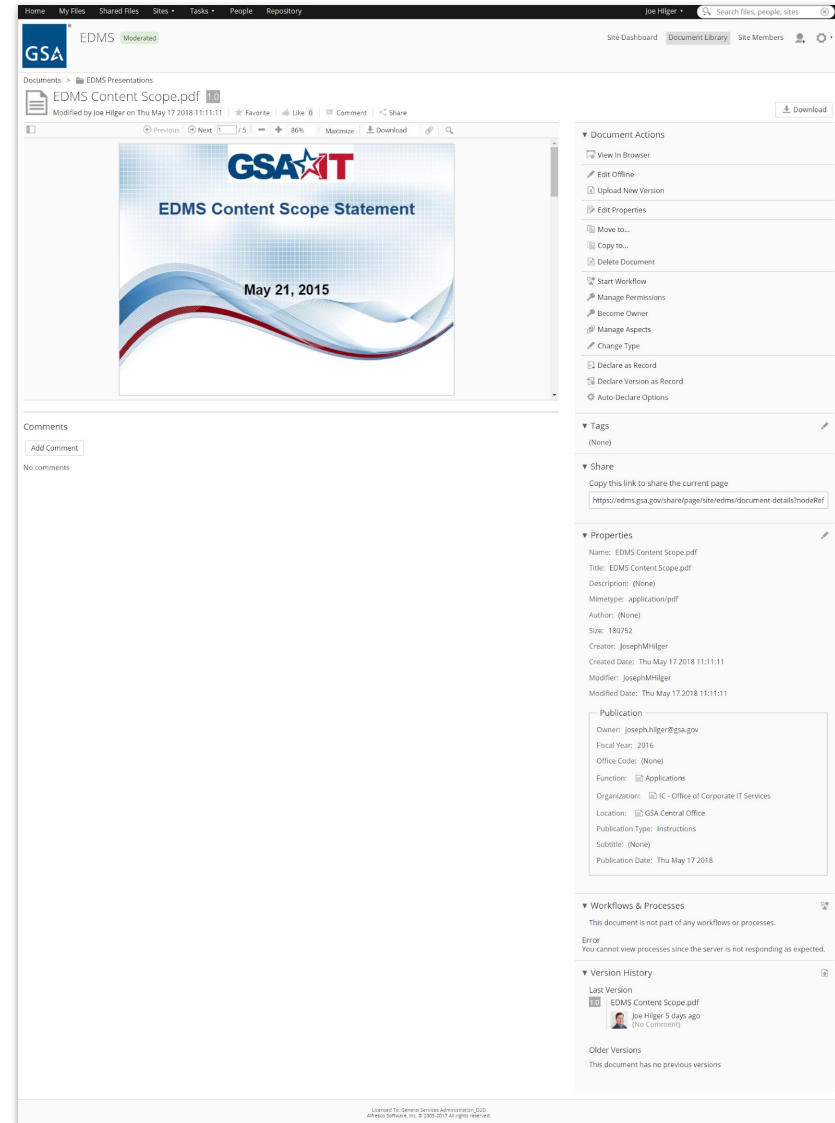
# EDMS vs. Google Drive

# When to use Google Drive vs. EDMS

| Document Management Requirement | Google Drive | EDMS |
|---|:---:|:---:|
| **Collaborate** on a document | X | |
| Store **working drafts** of documents | X | |
| Store **finished** document | | X |
| Store document that is an **official record** | | X |
| Store documents that were **authored by outside sources yet are used to make a decision** | X | |
| Store documents that were **authored by outside sources that are also a part of a case file or official GSA transaction** | | X |

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# Migrating onto the EDMS

# Important Statistics

- EDMS has licenses for all GSA employees and contractors.
- EDMS has been in production for over 2 years with 99.9% uptime.
- EDMS is currently storing over 8 million documents with over 1,500 users.

- Migrations typically take 6-12 weeks.
- We can work on 2-3 migrations at one time.
- There are close to 20 groups requesting to get onto the EDMS.

# EDMS Migration Process

**Discovery**

1

We meet with your team to get an understanding of your needs so that we can properly prioritize and plan the project.

**Analysis and Planning**

2

Our analysts work with your team to design folders, content types, and customizations required for your launch..

**Development and Testing**

3

Iterative development of the automated migration, content types, and any new features..

**Launch**

4

Migration of content to production, validation by the business and then support for clean-up and new features.

The EDMS team has developed a **repeatable process** (based on over 15 migrations) for migrating new groups onto the EDMS platform.

We use an **agile approach with three-week sprints** so that the content owners are actively involved in the process of designing and creating their new repository.

As part of this process, we assign a **single person** to serve as your point of contact for all design and development.

# FY18/FY19 Migration Prioritization

| Criteria | Description |
|---|---|
| **ROI** | Does this migration allow GSA to save money that can be used toward continued EDMS development? |
| **EDMS Feature Set** | Can the existing system support the customer's required features? |
| **Complexity & Amount of Content** | How complex will the migration of content and users be? |
| **Dependencies/Need** | Is there a critical need that cannot be met another way? |
| **Engagement** | Can the customer be actively involved in our project? |

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# Next Steps

- Express your interest in migrating to the EDMS to be added to the migration priority list.
- Identify a **primary point of contact for the** application or segment of your organization that you would like to migrate.
- Attend EDMS Sprint Reviews to keep abreast of project progress and migrations and to provide feedback.
- Gather key features that are required and identify content and people (users) that need to be migrated.

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