



CASE STUDY

ENTERPRISE DOCUMENT MANAGEMENT FOR A GENERAL COUNSEL'S OFFICE – IMPROVED COLLABORATION, SHARING, AND COMPLIANCE

BUSINESS CHALLENGES

Our client, the General Counsel's Office (GCO) of a leading global financial company, was using multiple disparate document management applications, file repositories, and collaboration solutions among their global regions for the management of their mission critical business documents. The primary legacy application became unsupported, and plans to extend it to meet business needs were not feasible. In addition, the client had a strategic initiative to implement a Records Management solution for the GCO. This plan could not be realized in the legacy system. The client sought to replace the existing application with a state-of-the-art enterprise Document Management solution to standardize document management processes globally, achieve higher levels of compliance, and provide the right foundation for their Records Management initiative.

Their ideal solution would be a standard Document Management platform with secure document sharing and collaboration features to suit all the global regions. It would also directly support the Records Management strategic initiative. Legacy content from several different existing repositories would need to be migrated to the target system. ArborSys accomplished each of these goals.

THE ARBORSYS SOLUTION

ArborSys collaborated with the client's key business and IT teams to design, develop, and implement an enterprise-wide document management system that met the client's needs comprehensively across the enterprise. ArborSys conducted requirements gathering workshops with each of the global groups to identify and standardize processes. After the design and implementation of the system was completed, ArborSys developed and delivered the training globally.

The ArborSys team was engaged to:

- Conduct requirements gathering workshops;
- Develop and document the business, functional, and technology requirements;
- Develop the detailed design;
- Configure and develop the custom application;
- Perform integration testing and support client testing and implementation.
- Develop the training plan, training materials, and conduct training for end users across all global regions.

EMC Documentum was used as the content management repository, and Documentum WebTop provided the user interface. Existing scanning facilities were used.

Functionality included:

- Management of the underlying workflows and lifecycles;
- User Interface customizations;
- Integration between Documentum and MS Office;
- Integration between Documentum and several desktop tools used by the legal team.

The engagement also included the migration of legacy content to the target Documentum repository. ArborSys analyzed various legacy repositories to design and develop migration processes and scripts. Qualification procedures and reports were developed to ensure accuracy. ArborSys worked closely with the client's IT team to execute and complete the migration, and all content was successfully incrementally migrated to each region prior to production roll-out of the application.

VALUE DELIVERED

Our team was able to design and deliver a solution that met the immediate needs of the client and explicitly supported their future strategic initiatives. The solution provided a standardized yet truly global platform for the management of all business critical documents, improved the efficiency of document sharing, made collaboration easier and more effective, and increased compliance across the enterprise.