



RDIMS Next Generation

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Presentation Outline

Historical Perspective

- RDIMS Shared System Policy Origin
- RDIMS Shared System Implementation
- RDIMS Review 2003

RDIMS REVIEW

- Trends
- Challenges and Constraints *Business Context*
- Key Business Drivers
- TBS IT and Shared Services Vision
- Known Issues
- Strengths *Current Assessment*
- Areas for Improvement

Targeted Strategy

- Guiding Principles
- Target RDIMS Solution Proposals
- Target RDIMS Strategy and TBS Policy Direction
- Proposed Strategic Thrusts
- Next Steps



RDIMS: Historical Perspective





RDIMS Shared System Policy Origin

- **RDIMS arose out of the Shared Systems Initiative (SSI), a major component of the GoC's strategy for improved program delivery and cost savings.**
 - departments share a minimum number of systems
 - cooperative approach to the acquisition of “best of breed” administrative systems and associated maintenance services.
- **Increased dependency on electronic records and Program review**
 - Resulted in a shift of records burden from IM specialists (records and librarians) to all workers; all use information/documents
 - Critical to program functions - accuracy and integrity of information
- **RDIMS Initiative**
 - Centralized Standard Setting and Product Acquisition – focus on Document Management, Records Management, Imaging, Routing
 - Efforts from over 18 departments to develop requirements (1998) re. management of information over life-cycle
 - RFP requirements reflection of generalized document/records management processes in GoC



RDIMS Shared System Implementation

- Department by department implementations
 - Board of Directors, Application Manager and Release Management Working Groups oversee the management of product evolution over course of contract
 - Development of annual business plan.
 - Managing product releases and means for sharing best practices and lessons learned
- Over 37,000 licenses in 34 departments/agencies
- As of Nov. 1, 2003 cost per seat @ \$382.50. After additional 5,000 seats acquired, cost per seat to drop to @ \$320.00.
- RDIMS contract recently extended to end of FY 2005/2006 for procurement (support and maintenance included to FY 2006/2007)



RDIMS Review 2003

- **Board of Directors - initiated review of RDIMS (May 2003)**
 - Examine delivery of RDIMS solution
 - Ensure that we have appropriate supporting policy, governance and procurement framework
 - Provide direction for next five years
- **Review has proceeded in three phases, with appropriate implementation phases to follow (aim to endorse review's strategic thrusts by Oct. 2003)**
 - Data and Requirements Collection
 - Assessment and Option Development, and
 - Development and Approval of Action Plan



RDIMS Review: Business Context



Business Context: Trends

- GoC is in the “information business”:
 - accountability & transparency
 - IM is “everybody’s business”
- Demographics & attitudes of GoC employees:
 - levels of ability
 - levels of IM awareness (e.g. “not my job”)
 - large % retiring – capture knowledge
- IM as business enabler
- Industry development of products that “bundle” software functionality & business process
- Focus on “security”



Business Context: Challenges and Constraints

- Info-sharing; re-use, but mixed messages re priorities & Shared Systems Initiative
- Central Agencies give direction & guidance, but not necessarily expected level of support
- Meeting legislated IM requirements; new MGI
- Best use of limited resources (\$, qualified people)
- leveraging RDIMS investment
- Managing transition(s) within change capacity of organization; need for BPR around IM
- Business solution vs IM requirement



Business Context: Key Business Drivers

- Delivery of mandate
- Information sharing within department, with public, across departments, with private sector, other levels of government
- “Build once, use many times” - common GoC-wide solution (interoperability & cost)
- Operate within legislation; e.g. ATI, Privacy



TBS IT and Shared Services 'Vision'.....

Current

- Infrastructure and systems developed/purchased through individual projects
- Replication and duplication of system investments in a distributed environment
- IT infrastructure investments and renewal costly and difficult to justify, focusing on expenditures
- Business process developed for individual programs
- Departmental/Division/Program architectures
- HR and Financial Services costly and complex to support in each department



Anticipated

- Initiatives optimized for whole of GoC contribution to user-centred services
- Fewer systems but used by more programs in a consolidated, interoperable environment
- IT infrastructure investments tied more directly to core business & service transformation
- Common business processes established to enable client centric services
- Enterprise Architecture (common language, standardized approach)
- HR & Fin Services cost-effective enablers of service delivery and sourced to world-class providers



RDIMS Review: Current Assessment



Current Assessment: Strengths

- **Exceptional Functionality:**
 - DM/RM
 - Excellent search & retrieval (network location not required)
 - Version control
 - Single repository (stores in native format)
 - Consistency & Integrity (precision and recall)
- **Enabling Infrastructure:**
 - Smaller player has equal Voice at Board of Directors table
 - Release Management Working Group doing excellent job
 - Shared System Initiative: GoC combined purchasing power



Current Assessment: Areas for Improvement

- **Functionality:**
 - Better handling of compound documents
 - “Intelligent classification” of documents
 - Enhanced security
- **Enabling infrastructure:**
 - Ability of solution to work on different technology platforms
 - Remote access (e.g. home office)
 - Support (Central Agencies & senior management of depts.)
 - RDIMS “Light”
 - Positioning & support as “business solution”



RDIMS Review: Targeted Strategy



Targeted Strategy: Guiding Principles

1. Business-focused IM solution
2. Seamless operation
3. Fully scalable IM solution
4. Full functionality, fully integrated solution
5. Flexibility of implementation
6. Leveraged functionality benefits all
7. Supported Shared Systems Initiative status



Targeted Strategy: Solution

- Business-focused RDIMS Solution:
 - Business case
 - Components support business needs
 - “Productized” applications build on best practices / lessons learned
- Shift from a strict *IM technology push* to a *business pull* approach



Targeted Strategy: Solution

- **Functionality:**
 - On every desktop
 - Standards exist for sharing documents & meta-data
 - Components acquired when business decides
- **Solution Delivery:**
 - Organization can do on its own, or
 - Organization can have qualified help - *RDIMS Delivery Support Centre*
 - Explore shared service offering for depts and agencies
 - Start at organization level & extend beyond



Targeted Strategy: Solution

- Procurement Environment:
 - Organization can procure the RDIMS components it needs
 - Qualified help is available (if / as required) to:
 - do planning & design
 - do training & installation
 - support the users & installed base
 - ease of procurement “built in”
 - TBS IM/IT Stewardship and PWGSC ensure that Schedule I, I.1 & II departments and agencies procure baseline DM/RM through PWGSC RDIMS contract
 - *RDIMS Delivery Support Centre* monitors evolution & problem resolution of software components, provides central repository of implementation resource tools.



Target Technology Infrastructure

- Bilingual DM/RM repository (certified)
- Fully J2EE Compliant (web enabled)
- CSE Certified for Sensitive Information (Protected B & above)
- Interoperable COTS application layers
- Fail over and Load Balancing
- Replicable and Interoperable Libraries
- Fully integrated with authoring tools
- Fully Web administered



Target Functional Requirements

Required on Every Desktop:

- searchable document repository (DM)
- life cycle mgt of records (RM)
- info protection (all security levels)
- ability to “view” documents created in other formats (“universal viewers”)
- info access (inside dept)
- role-based info access
- integration with desktop tools
- electronic signature
- auto-classification of records

Not Required on Every Desktop:

- imaging: to scan documents into DM
- info access: across depts, GoC, private sector, suppliers
- publishing info (printed & web)
- work flow mgt: basic level
- work flow mgt: applications & enterprise levels (e.g. case mgt)
- correspondence tracking
- e-forms mgt.
- Working together (“collaboration”): inside dept, across depts, GoC, private sector, suppliers

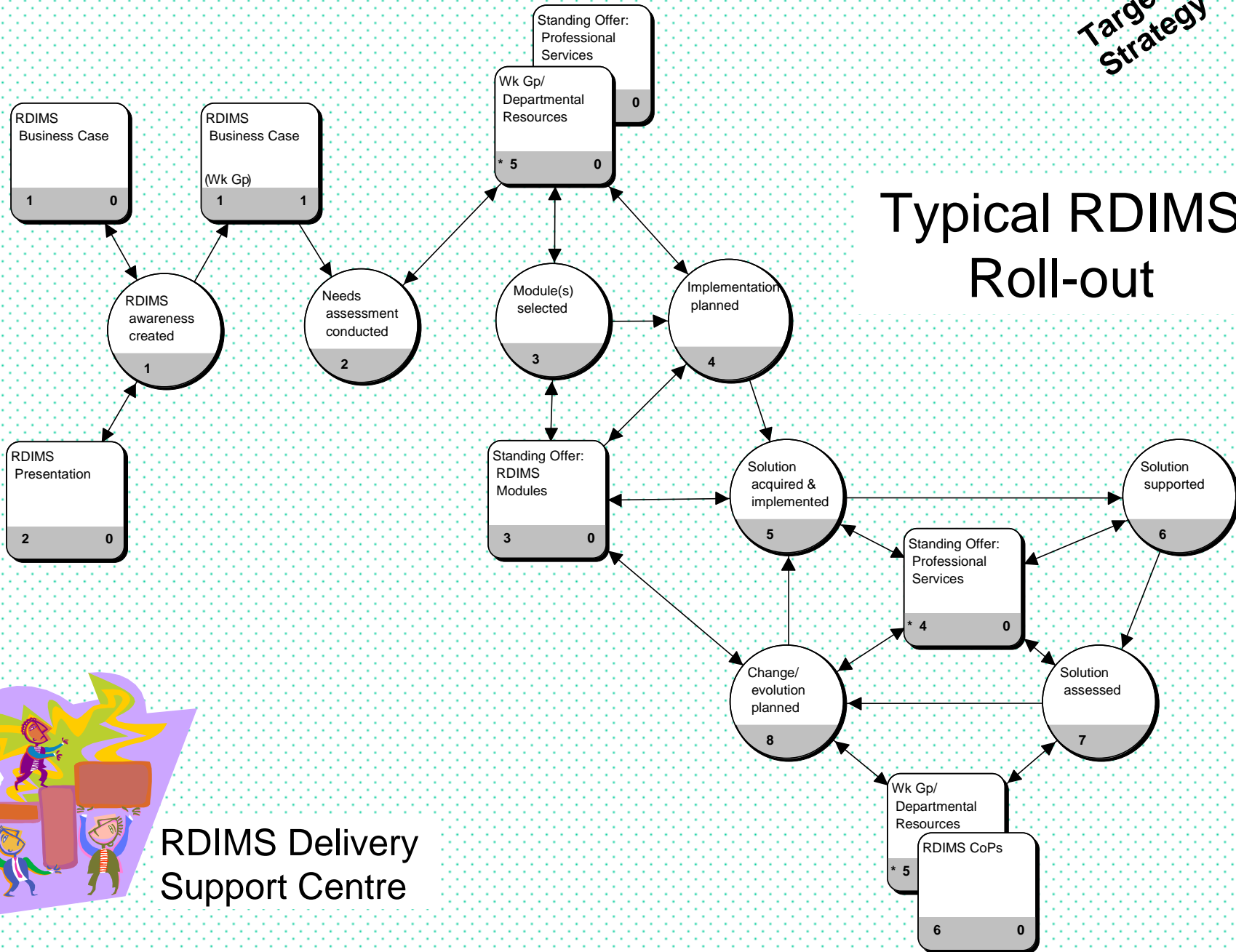


Targeted Strategy: Solution

- Sustainment & Evolution:
 - *RDIMS Delivery Support Centre*
 - supports business users
 - manages contracts
 - monitors requirements - initiates evolution of RDIMS solution
 - focus on addressing departmental business requirements and processes - integrated COTS solutions
 - explore possibility of shared service for end-to-end operational delivery

Targeted Strategy

Typical RDIMS Roll-out



RDIMS Delivery Support Centre

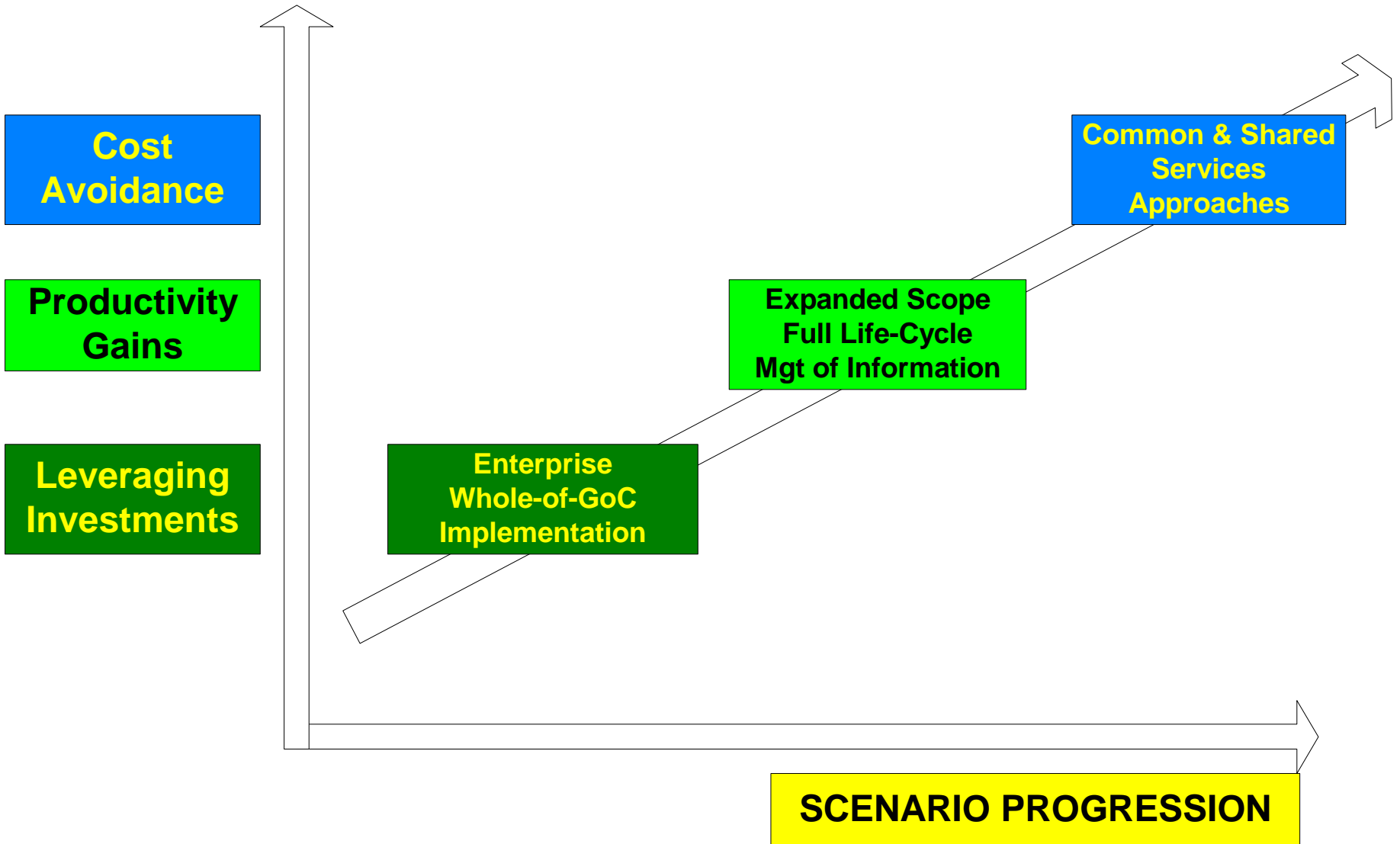


RDIMS Target Strategy and TBS Policy Direction

- **Proposed targeted strategy is aligned with TBS's policy direction re. Shared Services Opportunities:** Capitalize on common and shared services approaches, as a means of responding to the growing costs of putting into operations and maintaining IM/IT projects.
 - *Current RDIMS Initiative Shared System Approach*
 - Each department needs to develop competencies in developing user requirements
 - Time and resources away from core business
 - Implementation and maintenance costs high
 - Potential future incompatibilities across depts as add-on requirements are included
 - Potential for varying standards, guidelines and practices
 - *Targeted Approach*
 - Reduces the cost of implementations and maintenance across the GoC
 - Liberate resources to be applied to core business functions
 - Improved internal service delivery

Strategy Realization – Opportunity Curve

Targeted Strategy





Proposed Strategic Thrusts

- Establish RDIMS Delivery Support Centre
- Create enhanced awareness of IM/RDIMS business case amongst business managers & users, GoC-wide
- Position RDIMS within GoC IM architecture & management processes
- Identify champions and IM leaders in departments & establish responsibility for delivery of expected benefits
- Establish responsibility & resources for Managing Change & Implementation
- Establish standing offer for RDIMS functionality & professional services
- Align with outcomes of Expenditure and Management Reviews



Next Steps

- Promulgate the targeted strategy beyond RDIMS review team to impacted communities and decision-making bodies
 - RDIMS Board of Directors
 - Information Management Policy Committee
 - Administrative Systems Steering Committee
 - Departmental IM Champions and Leads
- Seek refinements and endorsements
 - Engagement of leads and service providers
 - Establish responsive Governance structure
- Approvals
- Develop Transition and Implementation Plans
 - Address sustainment and continued evolution



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