



An Enterprise Content Management Strategy for the Government of Canada

Government of Canada IM
Conference

October 2, 2006



Agenda



- IM Enablers in ITSB/PWGSC
- Our Mandate and Mission
- ECM in the GC
- Our products
 - RDIMS
 - CMS
 - Search
 - UPSS



IM Enablers in ITSB/PWGS

The Information Technology Services Branch (ITSB) offers a suite of products and services to meet the federal government's telecommunications and informatics requirements:

- Data Centre Services
- Distributed Computing Environment
- Information Management (IM) Enablers
- Network Services
- Shared Access Enablers



IM Enablers continued

- Provides business tools and processes for managing information assets
- Works in partnership with Treasury Board Secretariat (TBS) and Library and Archives Canada (LAC) to assist organizations in fully leveraging IT investments and ensuring compliance with IM policies



IM Enablers: Our mandate

To establish an infrastructure for IM services, standards, architectures and business solutions that:

- Enable sustainable, effective GC enterprise management of information assets.
- Enable business processes with technologies that result in improved delivery of services to the public and partners.



IM Enablers: Our vision

To provide leadership in the development and support of a common GC-wide IM platform that enhances and respects all stages of the information lifecycle.



A leadership role

- Distributing ECM tools
- Providing access to Subject Matter Experts
- Leveraging existing knowledge base
- Facilitating community development





IM philosophy

- GC-wide
- Open and standards-based
- Support for additional, complimentary or substituted components





ECM in the GC

- **Supported by:**

- **TBS Policies**

- Management of Government Information (MGI) Policy
- Access to Information Policy
- Privacy and Data Protection Policy

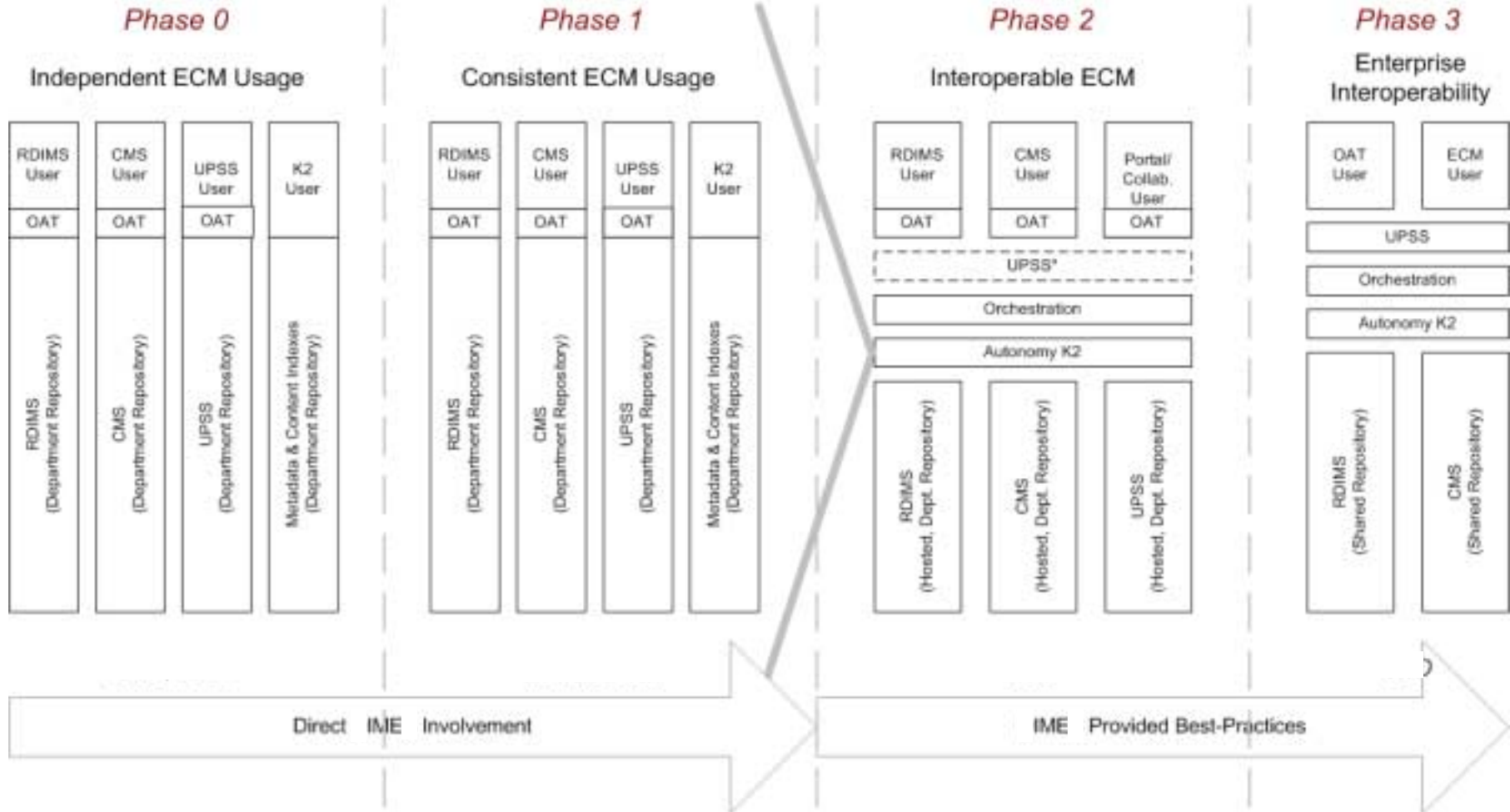
- **TBS/LAC Standards**

- Common Look and Feel for the Internet
- Treasury Board Information Management Standard, Part 1: Government On-line Metadata
- Treasury Board Information Management Standard, Part 2: Controlled Vocabulary



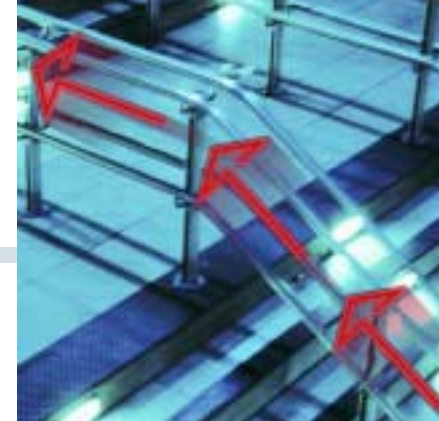


The phases of a unified ECM solution





Supporting the IM lifecycle



- Planning
- Collection, creation, receipt and capture
- Organization
- Use and dissemination
- Maintenance, protection and preservation
- Disposition
- Continued evaluation



Justify investment in IM



- Average worker spends >1 hour per day searching for information, emails, documents
- 35% of workforce eligible for retirement by 2010
- Physical storage costs need to be reduced
- Mobile population needs access
- GC needs to increase compliance and accountability
- Improved service to Canadians



Provide controls and functions

- Timely, accurate, available information
 - To whoever needs it (and is authorized)
 - When they need it
 - In a useful format
- Share and expose functions that will enable access and interaction with content and information holdings
 - Security tools or audit history
 - Profiles
 - Classification tools





Reduce IM risks

- Ease of accountability
- Maintain security and audit capabilities of information
- Ensure that information is created, presented and archived as per MGI guidelines





Reuse, repurpose, protect

- Reduce duplication of information
- Maximize information repurposing by sharing across various enterprise applications
- Protect information access by using integrated security functions





Challenges include...

- Management of Classified information
- Solutions for handling large volumes of email
- Long-term storage formats for electronic records and transfer to offline storage facilities
- Records management of Web sites
- Archiving of collaboration events
- Effectiveness of auto-categorization tools
- Integration with Secure Channel
- Integration of structured data systems



Success = Change management

- **Preparation**
 - Communicate validated information
 - Foster commitment
- **Action**
 - Involve participants
 - Design joint tasks
 - Align self and group interests
- **Behaviour**
 - Develop enthusiasm
 - Create culture of trust in the technology and process
- **Learning**
 - Adaptive
 - Self-managing



Change management continued



- Develop picture of existing state
- Renew mission as required
- Clarify existing values
- Establish criteria
- Decide on design
- Plan change program
- Monitor and improve



RDIMS



Records, Document and Information Management System (RDIMS)

RDIMS is a suite of products designed to provide GC departments and agencies with an integrated and economical software solution for consistent records and document management in support of the delivery of departmental projects and programs.



RDIMS value



Before RDIMS

- ATIP responses handled on a piecemeal basis
- Difficult access to information
- Manual version control, poor document control
- Minimal capacity to manage information
- Inconsistent IM practices
- Much knowledge leaves with employees

With RDIMS

- Facilitates compliance with federal legislation for IM (MGI, duty to document, Accountability Act & other policies)
- Improves response time, quality & cost to respond to ATIP
- Easier access to information
- Electronic, efficient version control
- Improves processes for decision making
- Enables consistent IM practices
- Corporate knowledge retained
- Facilitates IM business solutions



CMS

Content Management Solution (CMS)

The CMS supports organizations in managing the lifecycle of their websites' content.

Key functionality includes the ability to create, version, classify, approve, transform, search and deploy web content – increasing the effectiveness of your content on the Web.



CMS value

Before CMS

- A myriad of websites to manage separately
- Inconsistency of content published to websites (poor web-page control)
- ATIP responses almost impossible to respond to
- Loss of information or impeded processes through manual version control
- Inconsistent IM practices

With CMS

- Ability to consistently publish content to multiple sites (Internet/intranet/extranet)
- Enforcement of standard look and feel
- Increased capability to properly respond to ATIP requests (ability to revert back to a website at a previous date)
- Processes automated or controlled through workflows
- Standard IM/IT practices



Enterprise Search



Enterprise Search

Enterprise Search gives an enterprise the ability to find relevant information fast across the entire organization. Enterprise Search recognizes more than a hundred languages, different locales, and offers sophisticated pattern recognition for better search results.



Enterprise Search value

Before Enterprise Search

- Minimal/no trust in information retrieved
- Relevant content is lost with exponential growth of information
- Time wasted recreating information that already exists
- Difficult access to several sources of information

With Enterprise Search

- Increased trust/reliability in information retrieved
- Improved knowledge worker productivity
- More value obtained from existing intellectual capital
- Single source of access to relevant information
- Better compliance with ATIP searches



UPSS

Unified Portal Software Solution (UPSS)

UPSS provides organizations with a complete and integrated framework for developing, deploying, and managing enterprise Web portals to connect employees, citizens, partners and suppliers to corporate resources.

Through the collaboration component of UPSS, end users and external partners can cooperate in daily operations and in the creation and delivery of documents/deliverables.



UPSS Value: Collaboration

Before Collaboration

- Disjointed work and loss of time in meetings and travel
- Time wasted in reconciling information from diverse sources
- Poor reliability of meeting minutes
- Redundancy and repetitious work sessions, duplication of effort

With Collaboration

- Real-time collaboration - central location of all project-related content and single point of access for shared forums and work areas
- Productivity gains for group projects
- Coherent reusability of information, record of meetings/ working sessions
- Role-based access control and self-service management
- Access to workspace content from popular desktop tools, Web browsers, portals and mobile devices
- Controlled team environment for executing on standardized practices



UPSS Value: Portal

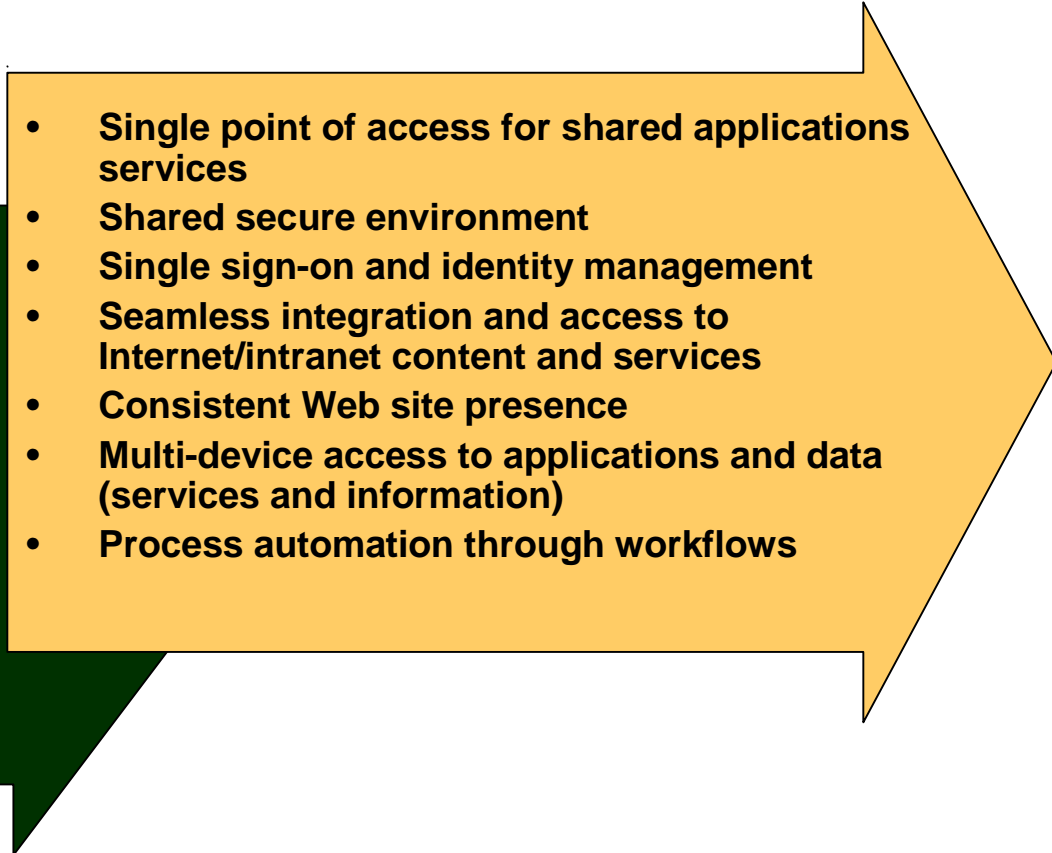


Before Portal

- Disperse/incoherent/multiple access to services
- No integrated security
- Inconsistent management of Internet/intranet
- Difficult to consistently publish to numerous Websites
- Inconsistent access to applications and data limited to desktop

With Portal

- Single point of access for shared applications services
- Shared secure environment
- Single sign-on and identity management
- Seamless integration and access to Internet/intranet content and services
- Consistent Web site presence
- Multi-device access to applications and data (services and information)
- Process automation through workflows





Procurement options



- **RDIMS**
 - RDIMS licenses are available to government departments and agencies at a charge of \$87 per seat per year to cover maintenance.
- **CMS**
 - The GC now owns an enterprise wide license. Content Management Software can be purchased as a package or separately: as either CMS (Interwoven, Cognos and Autonomy products) or Search (Autonomy).
- **Enterprise Search**
 - Search (Autonomy K2) can be purchased separately or as part of the CMS package.
- **UPSS**
 - A Portal Manager license is based on a total of 350 users.



Products in the GC



- **RDIMS**

- **INAC** – Ingrained into the culture of INAC; considered mission critical.
- **Transport Canada** – Universal usage across the organization; standard desktop package includes RDIMS.
- **Justice** – Used to interface with lawyers
- **Canadian Human Rights Commission** – Integrated with Case Management.
- **Heritage** – Supporting the 2010 Summer Games.
- **AAFC** – Integrating RDIMS, CMS and UPSS.
- **DND** – Selected as the enterprise solution for records and document management (9,000 to 12,000 licenses).
- **Canadian Food Inspection Agency** – In use across the organization.



Products in the GC

- **CMS**
 - **DND** – Corporate Web Hosting Services using to establish metadata standards, effective navigation and consistent Web site content pages.
 - **AAFC** – Using CMS to begin transformation of approximately 105 Internet and 75 Intranet sites.
 - **Fin/TBS/PSHRMAC** - Implementing to manage their Intranet (Infosite) that serves Finance Canada, TBS and PSHRMAC.
 - **LAC** – Implementing CMS to migrate, preserve and repurpose their electronic and digital contents – independent of formats and associated technologies.
 - **CRA** - Implementing the first iteration of their “PCMS” system to manage Media Room content in the CRA research environment.



Products in the GC

- **Enterprise Search**

- **LAC** – Federated search implemented to allow for searching across multiple repositories (databases and archives)
- **DND** – Implementation of an integrated search capability to allow employees to search within multiple information repositories simultaneously (federated search)
- Balance of CMS clients have Search implemented as part of their web content management solution



Products in the GC

- **UPSS**
 - **AAFC** - moving forward with Portal with a focus on Collaboration.
 - **PWGSC-led initiatives**
 - **NRCan** – Proof of Concept developed using UPSS collaboration; selected as the foundation for NRCan’s Intranet portal solution; to be integrated various components of PWGSC’s shared service initiative including CMS, RDIMS and UPSS.
 - Another agency is investigating a solution that will address the following key requirements:
 - Content management for the portal used to publish “Community of Interest” specific materials.
 - Support for communities of interest through collaboration tools (discussion forums, surveys, etc.).
 - PKI-integration with Secure Channel’s services (e.g. SAKMS).