



RDIMS Implementation in Government of Canada

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Overview

- RDIMS within Context of IM Shared System Domain
- RDIMS Governance
- Evolution of RDIMS in GoC
- Implementation Experiences – Lessons Learned
- The Way Forward
 - Challenges
 - Strategy
 - Conclusion



RDIMS within Context of IM Shared System Domain



IM Shared Systems Domain

- Records/Document/Information Management System (RDIMS)
 - Life cycle management of unstructured information
 - Supported by document and records management toolset
- Management of Executive Information (MEI)
 - Correspondence management
- Newsdesk Enterprise
 - Media Monitoring
- ATIP Suite
 - Tracking system of Access to Information Requests



Records/Document/Information Management System (RDIMS)

- RDIMS grew out of the Treasury Board Shared Systems Initiative.
- As a concept, it is designed to provide a model for the implementation of information management programs and tools.
- The product and the concepts work together to provide the federal government with the ability to collect and store information and to exchange information between government offices and with our clients and partners.
- Suite of products designed to provide departments with an integrated and economical software solution for records and document management. It includes such components as text search and retrieval, imaging, OCR, workflow and reporting.



What is being achieved with RDIMS?

- Compliance with legislation policy and guidelines
 - National Archives Act, National Library of Canada Act, Management of Government Information Policy
- Accountability and Citizen Trust
 - Facilitate ATIP requests
 - Efficient response to litigation
 - Record of Government activities captured and responsibly managed
- Knowledge Management
 - Assist in preservation of corporate memory
 - Employees have access to information they need to do their job
- Efficiency Gains
 - Less time spent by knowledge workers searching for information (high value work replaces low value activities)
 - Reduction in space required for paper records



RDIMS Governance



RDIMS Governance

- **Administrative Systems Steering Committee**
- **Board of Directors**
- **Release Management Working Group**
- **Application Manager (CAC)**
- **Project Authority**
- **Contract Authority**

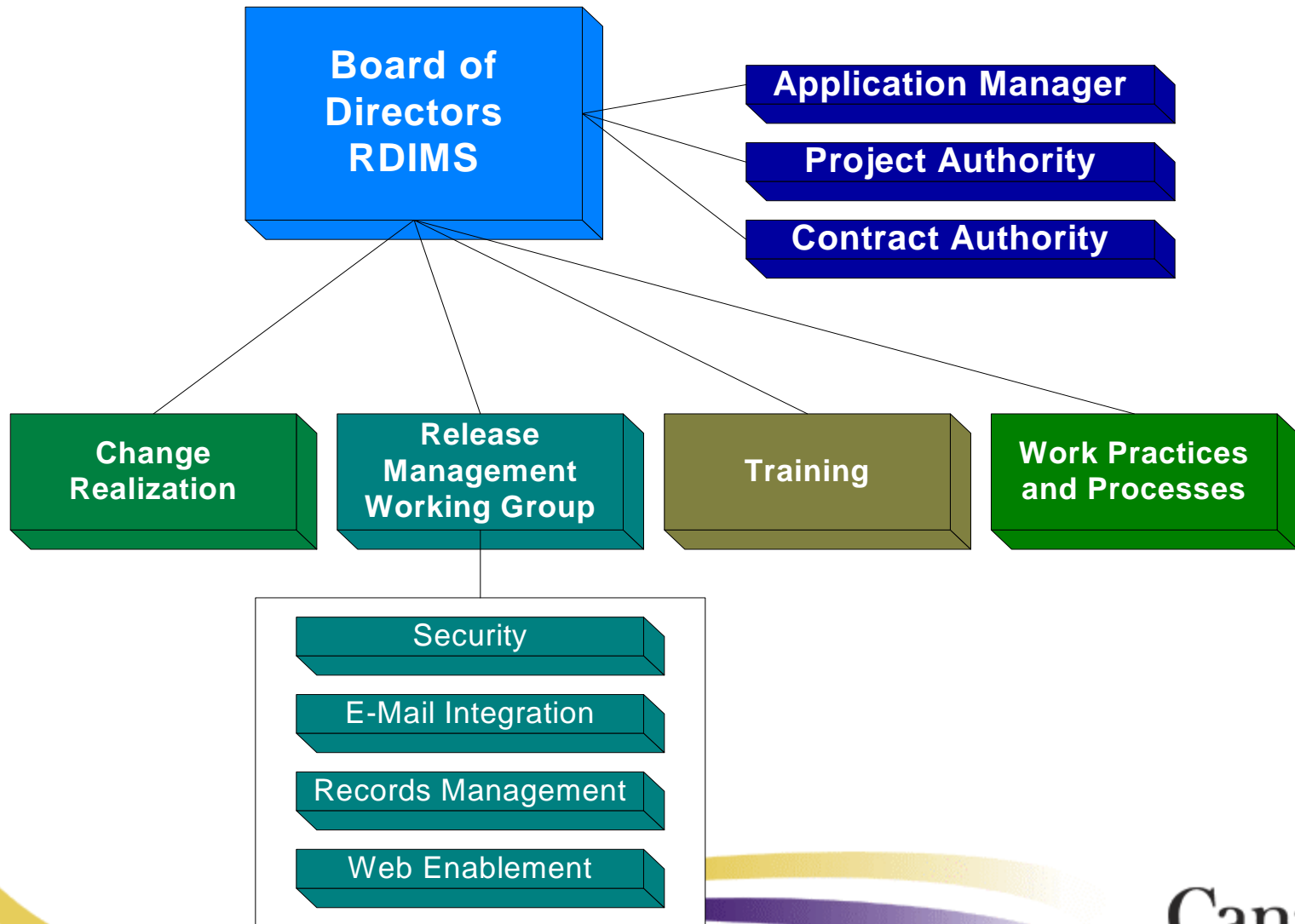


RDIMS Governance

- **Administrative Systems Steering Committee (ASSC)**
 - Provides leadership and stewardship for the Shared Systems Initiative.
 - Set the strategies, priorities and policies for the Shared Systems Initiative.
 - Endorse and champion the vision, goals and objectives, strategic plan, framework and principles for the Shared Systems Initiative.
 - Review and approve criteria for endorsement or removal of shared systems as required.
 - Review and endorse domain business plans.
 - Domains = Comptrollership, HR, IM



RDIMS Governance





Evolution of RDIMS in GoC



Evolution of RDIMS in GoC

1998 RDIMS Contract Awarded to CGI

- Acquisition of a government-wide contract for an integrated suite of commercial off-the-shelf software to provide records and document information management
- License purchase: 5-year contract (1998-2003)
- Software maintenance: 6-year contract (1998-2004)

1998

1999

2000

2001

2002

2003



Evolution of RDIMS in GoC

1998 RDIMS Contract Awarded to CGI



1999 BOD

- Interdepartmental RDIMS Board of Directors (BOD) established
- Direct the development of RDIMS
- Foster its implementation in partner departments

1998

1999

2000

2001

2002

2003



Evolution of RDIMS in GoC

1998 RDIMS Contract Awarded to CGI



1999 BOD



1999 Shared System Review

- TBS CIOB – Information Management Leader
- Formal recognition of the functional authority for Information Management in the federal government

1998

1999

2000

2001

2002

2003



Evolution of RDIMS in GoC

1998 RDIMS Contract Awarded to CGI



1999 BOD



1999 Shared System Review



2000 RMWG

- Release Management Working Group (RMWG) established
- Supportive working group to Board of Directors
- Defining requirements and managing release issues

1998

1999

2000

2001

2002

2003



Evolution of RDIMS in GoC

1998 RDIMS Contract Awarded to CGI



1999 BOD



1999 Shared System Review



2000 RMWG



2001 RDIMS Review

- Assess implementation at mid-point of contract
- Electronic IM initiative has languished since mid-1990s (Year 2000 and GOL precedence)
- Functionality of RDIMS represents good value
- Hummingbird's IM suite was and still is, one of the leading generic document management solutions on the market.
- Success of RDIMS in depts depends more on proper organizational and cultural change mgt than on technical issues



Evolution of RDIMS in GoC

1998 RDIMS Contract Awarded to CGI



1999 BOD



1999 Shared System Review



2000 RMWG



2001 RDIMS Review



2001 RDIMS Review – Response

- TBS Management Response
 - Promote IM; TBS stronger leadership
 - Support continued development of product
 - Communication plan in RDIMS community
- BOD Strategic Planning Session
 - Strategic goals and action plan
 - 5- year Business Plan



Evolution of RDIMS in GoC

1998 RDIMS Contract Awarded to CGI

- ◆ 1999 BOD
- ◆ 1999 Shared System Review
- ◆ 2000 RMWG
- ◆ 2001 RDIMS Review
- ◆ 2001 RDIMS Review – Response
- ◆ 2002 Accountability Shift

1998

1999

2000

2001

2002

2003

– Accountability for Shared Systems in IM transferred from the TBS IM Division (GOL) to the IT/IM Stewardship Division

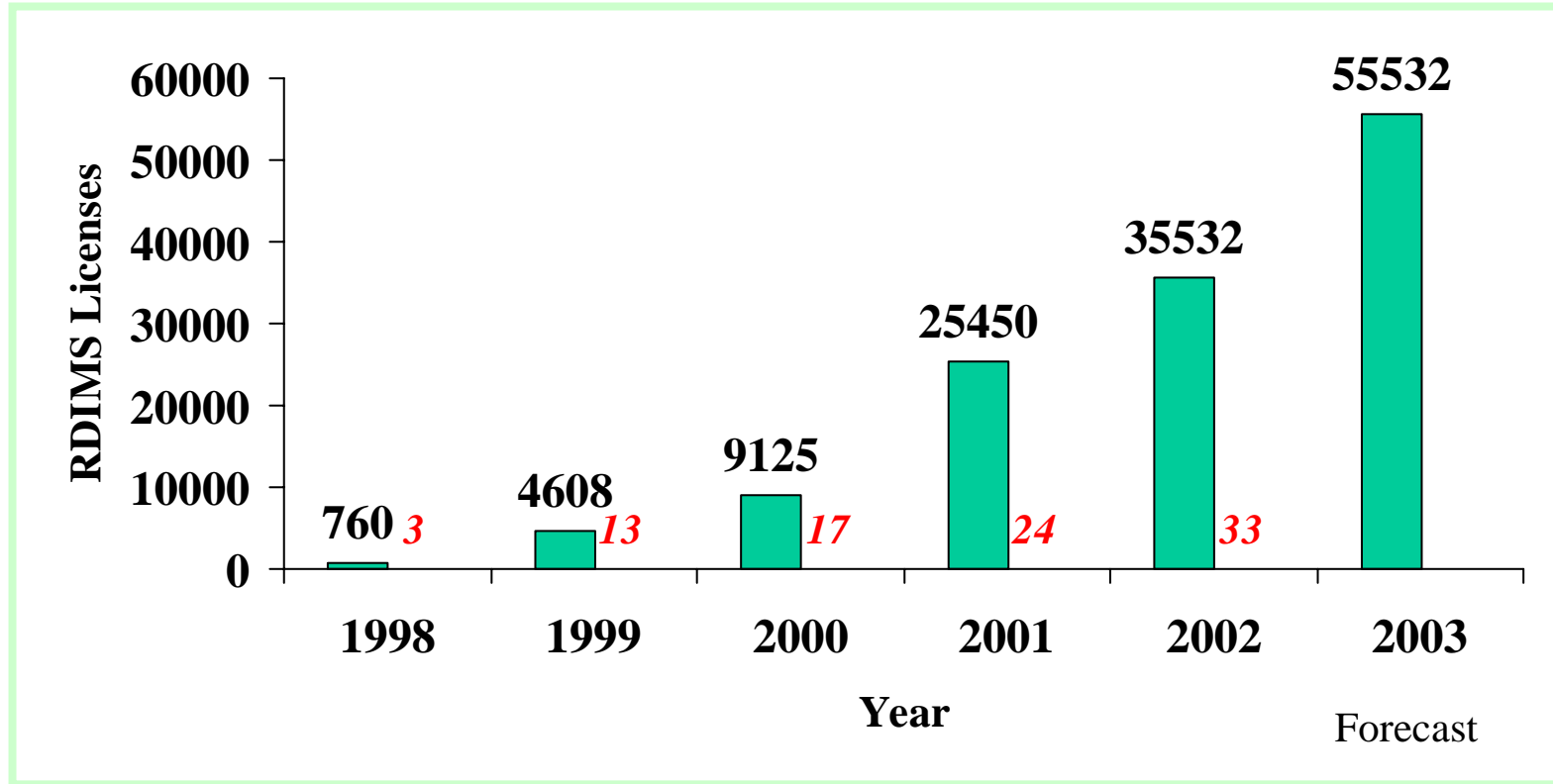


RDIMS - Current Status

- A total of **35,532 licenses** as of March 31, 2002
- 33 departments and agencies:
 - More than 50% in production environment
 - Other sites are in pilot/proof of concept testing
- Two environments:
 - Client Server: Stable and Mature Client Server suite
 - Enterprise Web version: Available since February 2002



RDIMS Growth



Note: Number of departments and agencies are in italics.



Implementation Experiences Lessons Learned



RDIMS Implementations – Lessons Learned

- Senior Management support is critical
 - Business Case difficult to develop; difficulties in quantifying benefits and identifying performance measures
- Communications & Change Management Strategies are imperative
- Comprehensive training and support program is essential
 - Information Management principles, business rules
- Implementation demands collaboration and synergy from cross-organizational and cross-functional expertise
- Gradual and incremental implementation is necessary



RDIMS Implementation in GoC

The Way Forward



The Way Forward – Challenges

- **Integrated Document Management (IDM) is a mature market**
 - **Library services (check-in and check-out)**
 - **Version Control**
 - **Records services**
 - **Search / Retrieval**
 - **Basic workflow**
 - **Imaging**
- **Seeing a merge of Web Content Management, IDM, and correspondence management markets**
- **Increasing focus on requirements such as collaboration, workflow, content, and case management**



The Way Forward – Strategy

- **A clear focus on record and document management – full life cycle management of unstructured information**
- **A commonality of business processes e.g. retention and disposition – more than a software application**
- **A domain tied in with the Framework for the Management of Information**



Conclusion

- **RDIMS (as a Shared System) has shown to provide good value to GoC**
 - Addressing life cycle management of unstructured information
 - Cost per seat
- **Effective Governance in place**
 - Supporting its adoption across the GoC
 - Address domain and cross domain issues
 - Leadership on product evolution and future directions
- **Critical Mass of Departmental Implementations**
 - Lessons learned
 - Sharing of best practices
 - Approaching Enterprise-level adoption
- **Way forward**
 - Review of requirements and processes (evergreening)
 - Linkage with other GoC IM initiatives – FMI, GOL, FAP
 - Best value for GoC