Scaling a Higher Education Enterprise
Electronic Content Management (ECM) System
About the Texas A&M University System

One of the largest systems of higher education in the nation

In the statewide network
- 11 universities
- Seven state agencies
- A comprehensive health science center

A&M System members
- Educate more than 120,000 students
- Reach another 22 million people through service each year
- Include more than 28,000 faculty and staff
- Has a physical presence in 250 of the state's 254 counties
- In 2011, externally funded research expenditures exceeded $780 million to help drive the state’s economy
AgriLife’s Organizational Structure

- Vice Chancellor of Agriculture
- College of Agriculture and Life Sciences
- 4 state agencies
- 85 major units and 250 County Offices
Texas A&M AgriLife Locations

- Agricultural Research / Extension Centers
- Research Stations or Laboratories
- Texas Forest Service Offices
- Texas Veterinary Medical Diagnostic Laboratories
- TAMUS Universities
- Texas AgriLife Extension offices located in 250 counties

Bob Hensz
RFP and Implementation

- RFP in 2005
- RFP Team included IT, Economist, College Department and Agency personnel, and Purchasing
- Selection matrix: cost a major factor
- Implementation used same team, and added some additional personnel for testing
- Phased Implementation
  - Phase 1: basic installation, file structure and imaging
  - Phase 2: automation from main frame
  - Phase 3: workflow

Automation Examples

- Accounts Payable Data forms for purchase vouchers: printed, matches, and filed
- Payroll change forms: printed, overlay applied, metadata added, filed
- Purchase Orders, Printed, overlay applied, metadata added, placed in working folder
- Use of Inboxes: move a document from one unit to another instantly
ROI (as of December 2010)

- Overnight Mail: eliminated 58/week
- Copies: eliminated 23,335 copies per week, and eliminated copiers
- 5-Drawer File Cabinets: eliminated 158, over 1000 sq. ft. of space
- Rotary File cabinets: 21, about 344 sq. ft.
- Positions eliminated: 2 budgeted & 4 student workers in accounts payable
- Automation: saved over 8000 man hours/year for filing
- Automation: also saved printing of over 200,000 pages per year
- Volume of documents: over 14 Million pages, stack 2800 ft. high weighing over 80,000 pounds
ECM as a Shared Service

History
- Campus Document Management Committee

Vision
- Making institutional information secure and useful

Goals
- Avoid software/hardware purchases at department level
- Reduce costs by eliminating redundant systems
- Enhance ability to share documents and workflows
Benefits of a Shared Service ECM

Judith Lewis

IT governance
- Institutional, state and federal compliance
- Standardized approach to content management
- Integrated operations
- Value delivery
- Risk mitigation
- Life-cycle management
- Continuity of operations
- Document sharing
- Economies of scale
Coburn’s Qualitative Aspects of Scaling

Judith Lewis

Spread
- Conventional connotation of scaling (more units, more modules)

Depth
- Participative social interaction

Sustainability
- Underlying momentum taking hold

Shift
- Change in ownership

Vendor Maturity Model Approach

Judith Lewis

- ECM Maturity Model
  - Localize best practices
  - Standardize across the institution
  - Consolidate
  - Cost benefits realized
  - Continuous review for quality improvements

Leveraging an ECM Maturity Model Approach

Gartner’s ECM Maturity Model: Five Levels

-- Maturity Model for Enterprise Content Management, Gartner, 2011, ID # G00213197.
Gartner’s Six Factors Maturity Model Approach

-- Maturity Model for Enterprise Content Management, Gartner, 2011, ID # G00213197.
Level 1: Initial

Level 1 facets:
- Each installation a silo
- Multiple contracts with the same vendor
- Multiple vendors for the same service
- Multiple systems

Looking to the next level:
- Create an ECM program
- Establish IT governance to bridge information gaps
Level 2: Opportunistic

Level 2 Facets:
- Use becomes part of business processes

Looking to the next level:
- Itemize checklist of needed features and functions
- Consolidate vendors
- Choose ECM for strategic purposes
- Organize governance efforts into a steering committee
Level 3: Organized

Level 3 Facets: Selection of Laserfiche (2010)
- Shared Services Initiative (2010)
- Steering Committee and Project Manager (2011)
- ECM team has long-range plan; but, organization still has multiple products and repositories

Looking to the next level:
- Report ECM progress regularly to build support (branding/communication effort)
- Survey organizational metadata schemas/requirements (training, education, collaboration)
- Work with colleagues to better align ECM and BPM by re-engineering processes (collaboration)
Laserfiche Shared Service

Laserfiche is the preferred vendor for Texas A&M University's enterprise document management implementation and is offered to The Texas A&M University System as a shared service. Laserfiche captures paper and electronic documents and provides document storage, retrieval, security and archiving.

The IT Solutions and Support group of Computing & Information Services, a department of Texas A&M Information Technology, provides central support for Laserfiche. Please contact ITSS at 979.847.4877 or laserfiche@tamu.edu.
Branding for Texas A&M Laserfiche

Judith Lewis
Level 3: Organized

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Level 4: Enterprise

Level 4 Facets:
- Multi-server, Multi-User
- Metatagging is automated
- Better leverage of the Steering Committee for establish enterprise policies and practices
- ECM team consolidates overlapping projects

Looking to the next level:
- Goal of making the organization more agile: Look for ways to adopt new technologies and new sources of content

LEVEL 4 EXPANDING REACH
Enterprise Shared Service Model

Single Server to Multiple Servers

--Diagram provided courtesy of Laserfiche
Level 4 Facets:

- Multi-server, Multi-User
- Metatagging is automated
- Better leverage of the Steering Committee for establish enterprise policies and practices
- ECM team consolidates overlapping projects

Looking to the next level:

- Goal of making the organization more agile: Look for ways to adopt new technologies and new sources of content
Level 5: Transformative

Level 5 Facets:

- The organization uses ECM to change the way it does business
- Leveraging exemplar processes (ex. Contracts)

How to remain at the transformative level:

- Turn business and vendor partnerships into collaborations for future vision and planning (Master contract)
Coburn’s Aspects of Scaling


Spread (More units, More modules)
- Single server to multiple server implementations
- Five-year plan to scale the shared service initiative

Depth (Participation)
- Engagement/support of the shared service
- Success of the agency is tied to the success of the shared service

Sustainability (Momentum taking hold)
- Document Imaging Selection Committee decision
- Executive support
- CIS shared service focus on branding, training, collaboration, maturity model
- Steering Committee involvement
- User Community of Practice (in development)

Shift (Change in Ownership)
- Localized successes lead to shared adoption
- Spontaneous collaboration
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