

Briefing for **SFA Records Management Alternatives**



EDS Proprietary

Why Are We Here?

- **Deliver an analysis of COTS alternatives for a records management solution**
- **IPT review**
- **SFA CFO decision**

Agenda

- **Background**
- **Evaluation process**
- **Evaluation criteria**
- **Summary**
- **Evaluation results**
- **Decision**

Background

- **An electronic document/records management system is needed to:**
 - Efficiently store and retrieve documents
 - Safeguard enterprise records
 - Legally dispose expired records
 - Save office space

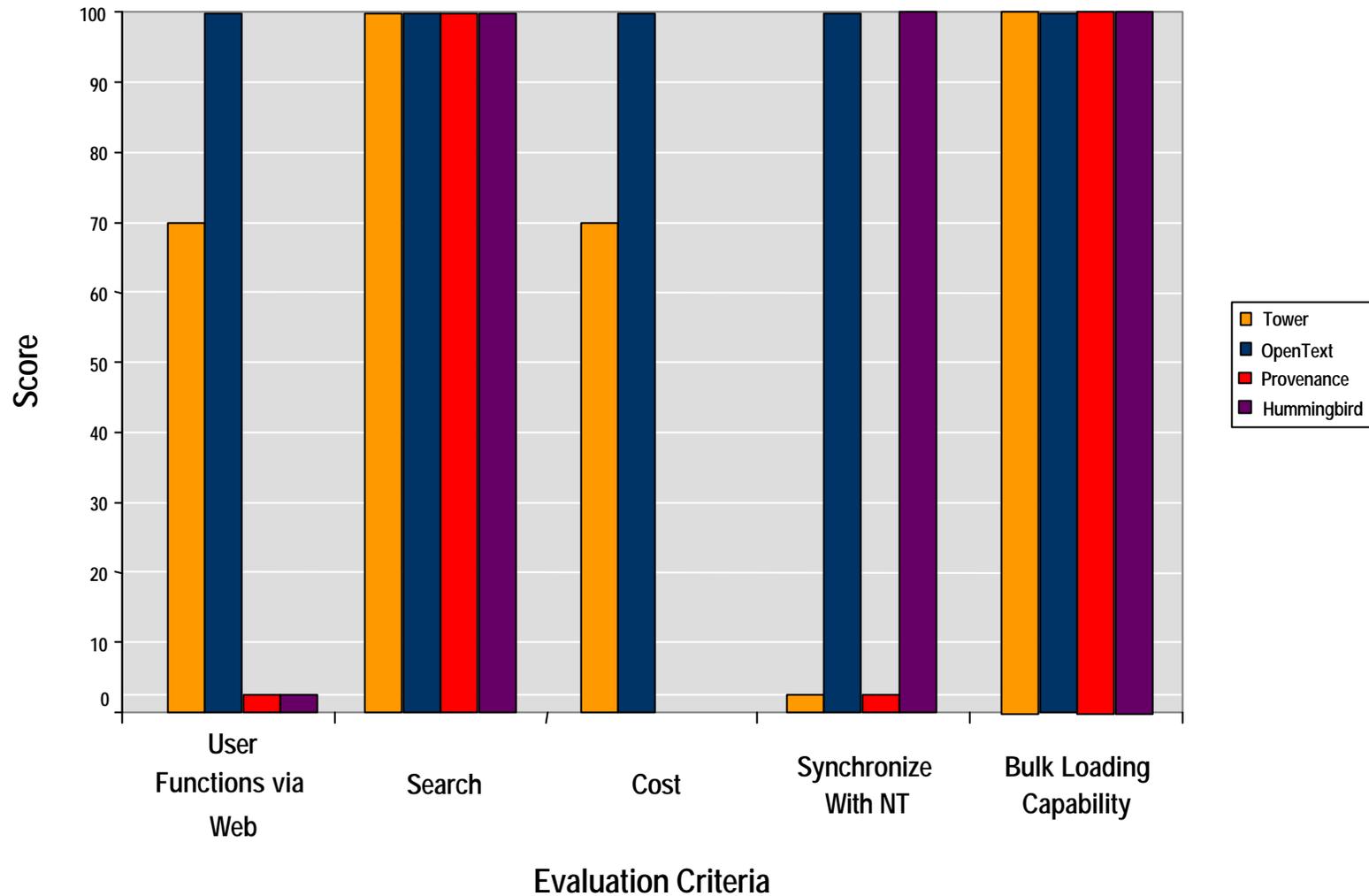
COTS Evaluation Process

- **Focus on records management and web-based capabilities**
- **Evaluated only DOD 5015.2 certified products**
- **Selected leading 4 vendors to demonstrate capabilities to SFA and EDS**

COTS Evaluation Process

- **COTS products rated according to:**
 - Technical response to RFI presented during demonstrations
 - Additional research, i.E., Doculabs, Gartner Group, DISA 5015.2 certification report
- **Weighted and normalized criteria**
 - Rated from 0 to 100 on each criteria
 - Rated without cost as a criteria
 - Rated again with cost as a criteria

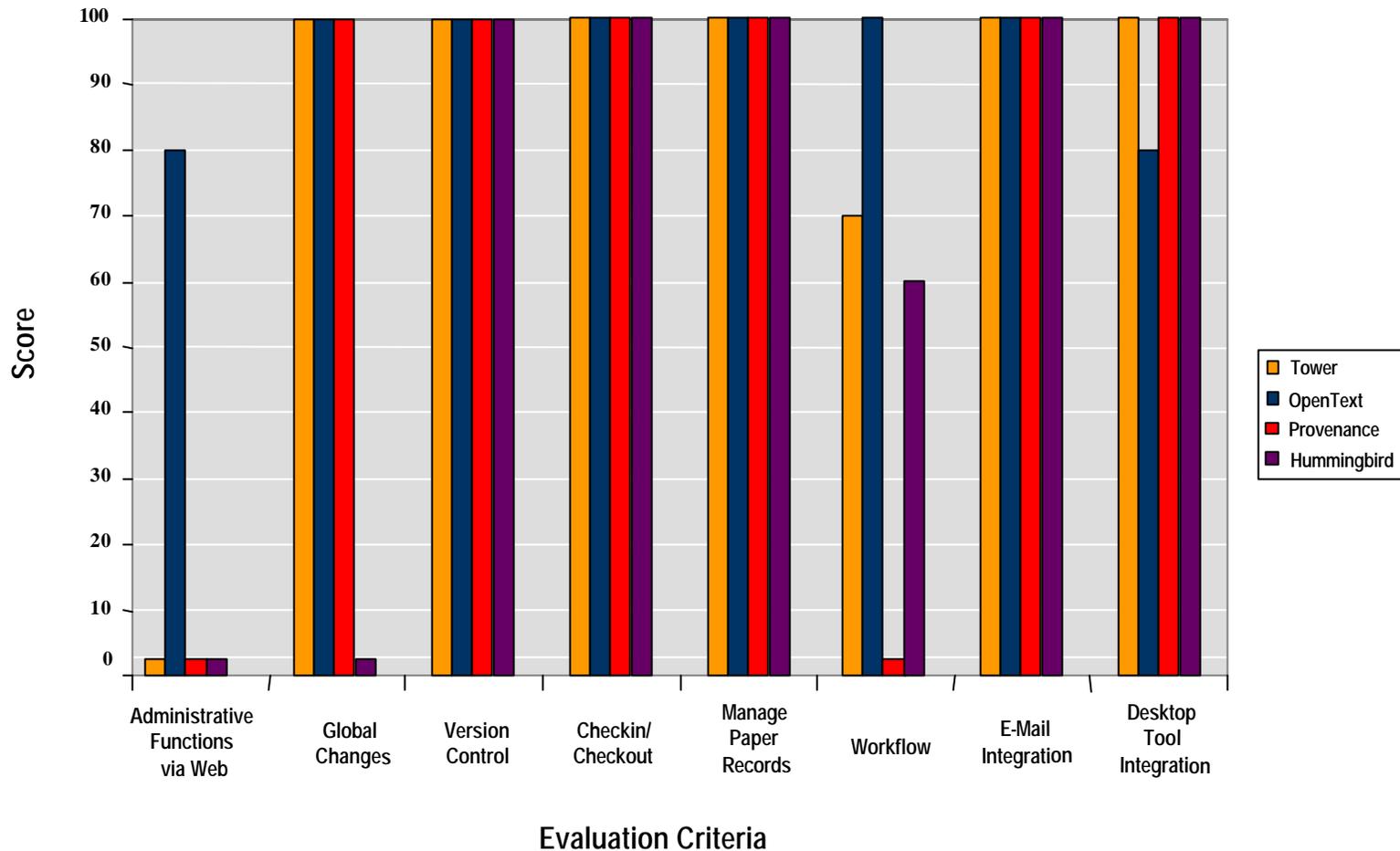
COTS Evaluation:high Priority Criteria



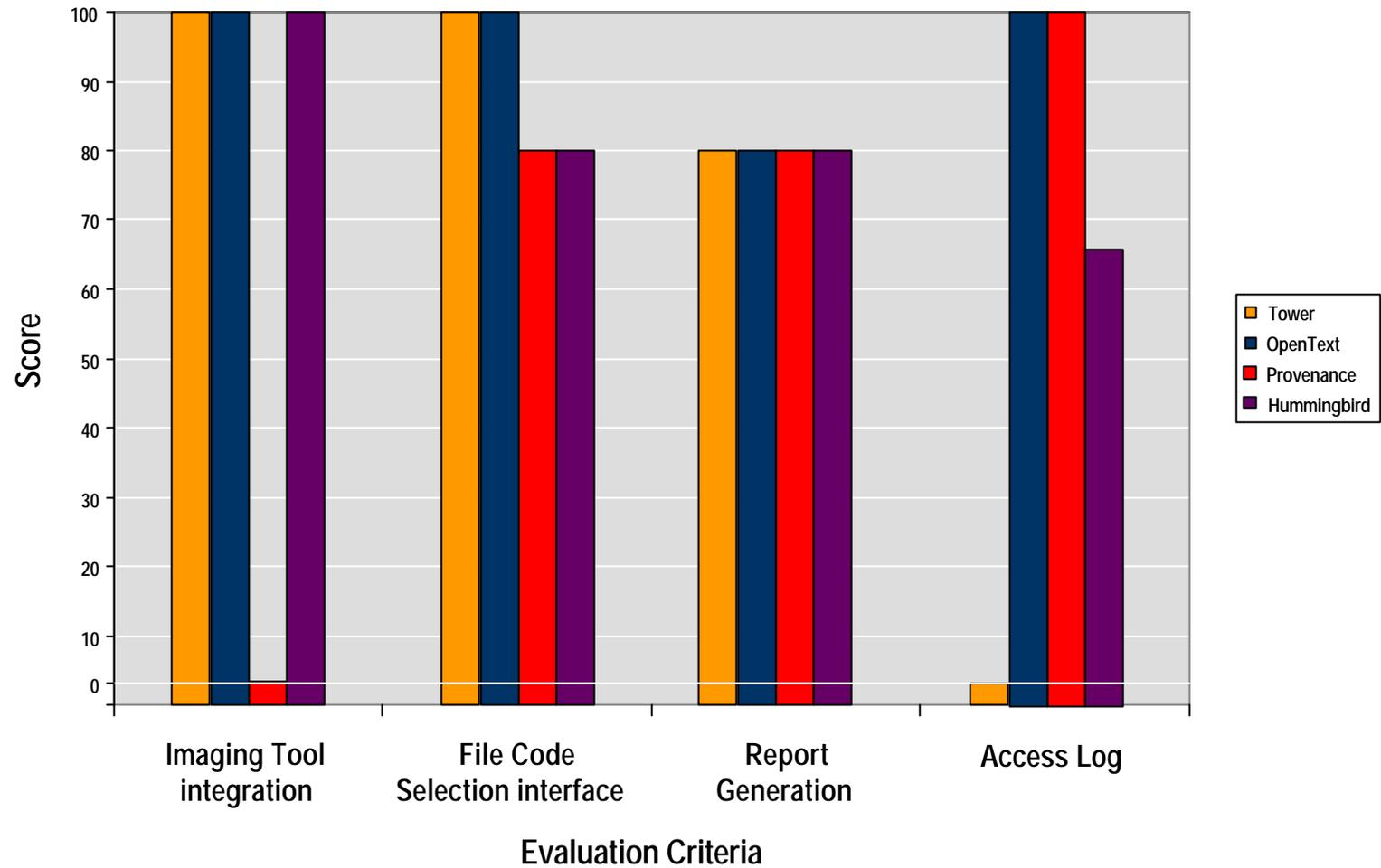
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COTS Evaluation: Medium Priority Criteria



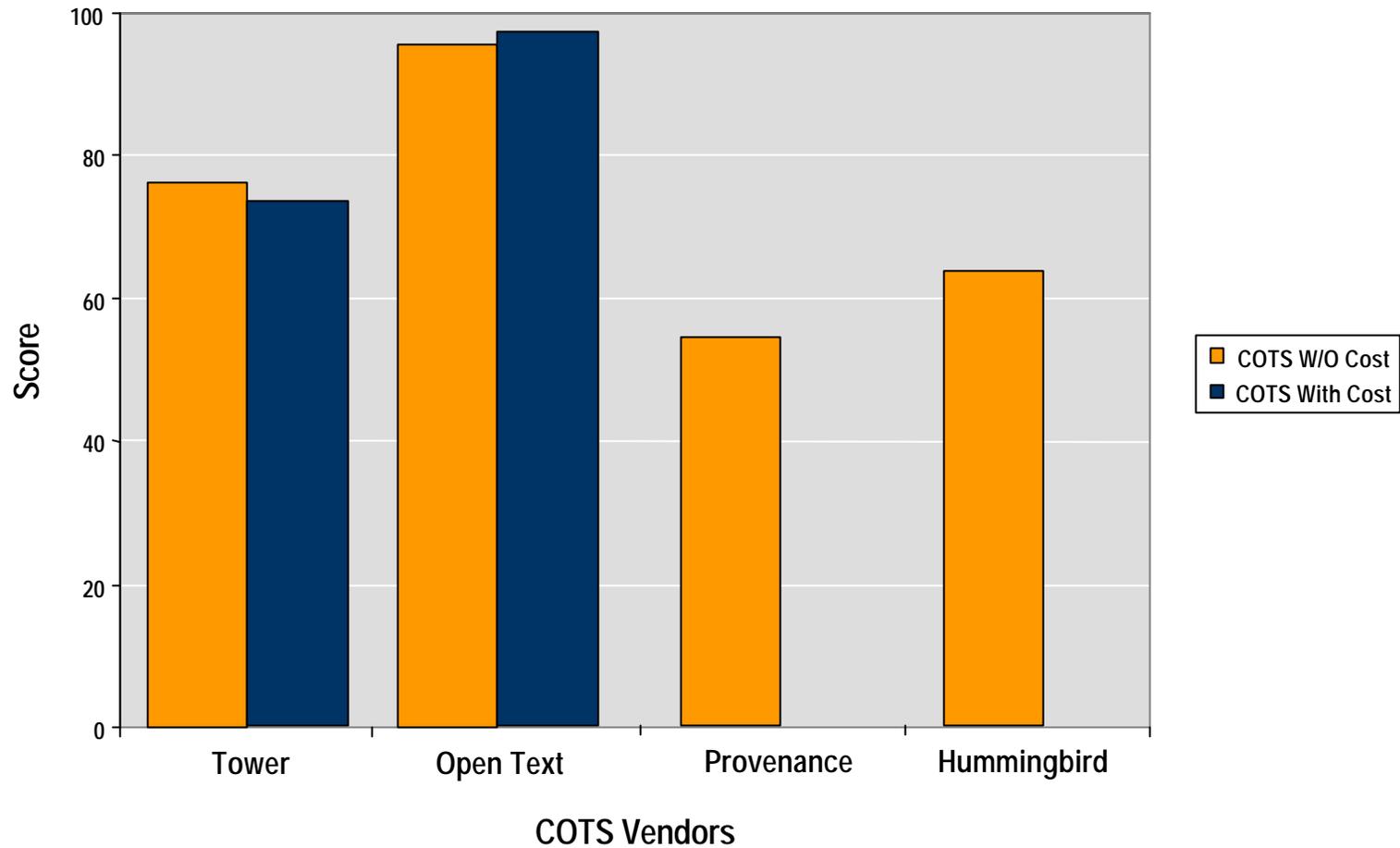
COTS Evaluation: Lower Priority Criteria



Summary

- Tower
 - **Scored 75.4 without cost**
 - **Scored 74.1 with cost**
- Open text
 - **Scored 98.2 without cost**
 - **Scored 98.8 with cost**
 - **Only complete web-based product demonstrated**
 - Ease of implementation
 - Ease of maintenance
 - Accessibility

COTS Evaluation Results



Decision



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Backup Slides



Background: Definitions

- **Document management**
 - Documents created, managed, and owned by author(s) of the document.
- **Records management**
 - When corporate policy dictates a document to become a record, ownership and management responsibilities shift away from the author to the organization.

Background: DM Vs RM

Characteristics	Document Management	Records Management
Primary application focus	Information-centric	Policy-centric
What application is designed to do	Manage information in documents, make it easy to find and access	Control corporate assets, ensure compliance
Role of a "document"	Information container	Evidence
Value basis	Re-usability, reference	Statutory, regulatory, operational, historic
Duration of usage	Instantaneous -- used during creation, revision, or searching	Used during the entire life cycle
General attitude	All information is created equal; keep everything	Information can be our undoing; destroy it as soon as permitted

Background: Office Vs DM Vs RM

Functions	Office Suites	DM	RMS
Administration			
Document access security		YES	YES
Rights management			YES
Capture/Create			
Document import/export		YES	
Image capture		YES	
Index/Organize			
Uniform classification			YES
Retention citations/scheduling			YES
Store			
Document migration		YES	
Archiving			YES
Retrieve			
Store/retrieve metadata		YES	YES
Searching metadata		YES	YES
Store/retrieve content	YES	YES	YES
Searching content	YES	YES	
Process/Edit			
Version control	via API	YES	YES
Check in/out	YES	YES	
Document viewing	YES	YES	
Document annotation	YES	YES	
Document editing	YES	via API	