



Costing EDRM Programmes

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Aim



**To provide you with an overview of the cost drivers for
Electronic Document & Records Management (EDRM)
Programmes based on our Central Government experience**

Conflicting Goals?



Document Activity/Effort

Document Management

Business Goals:

- Productivity, (speed of capture & retrieval)
- Storage (minimise)
- Accessibility (within security constraints)
- Compliance (legal retention)

Preservation Goals:

Accessibility and understanding over time

Records Management

Time

Months

Years

Outline

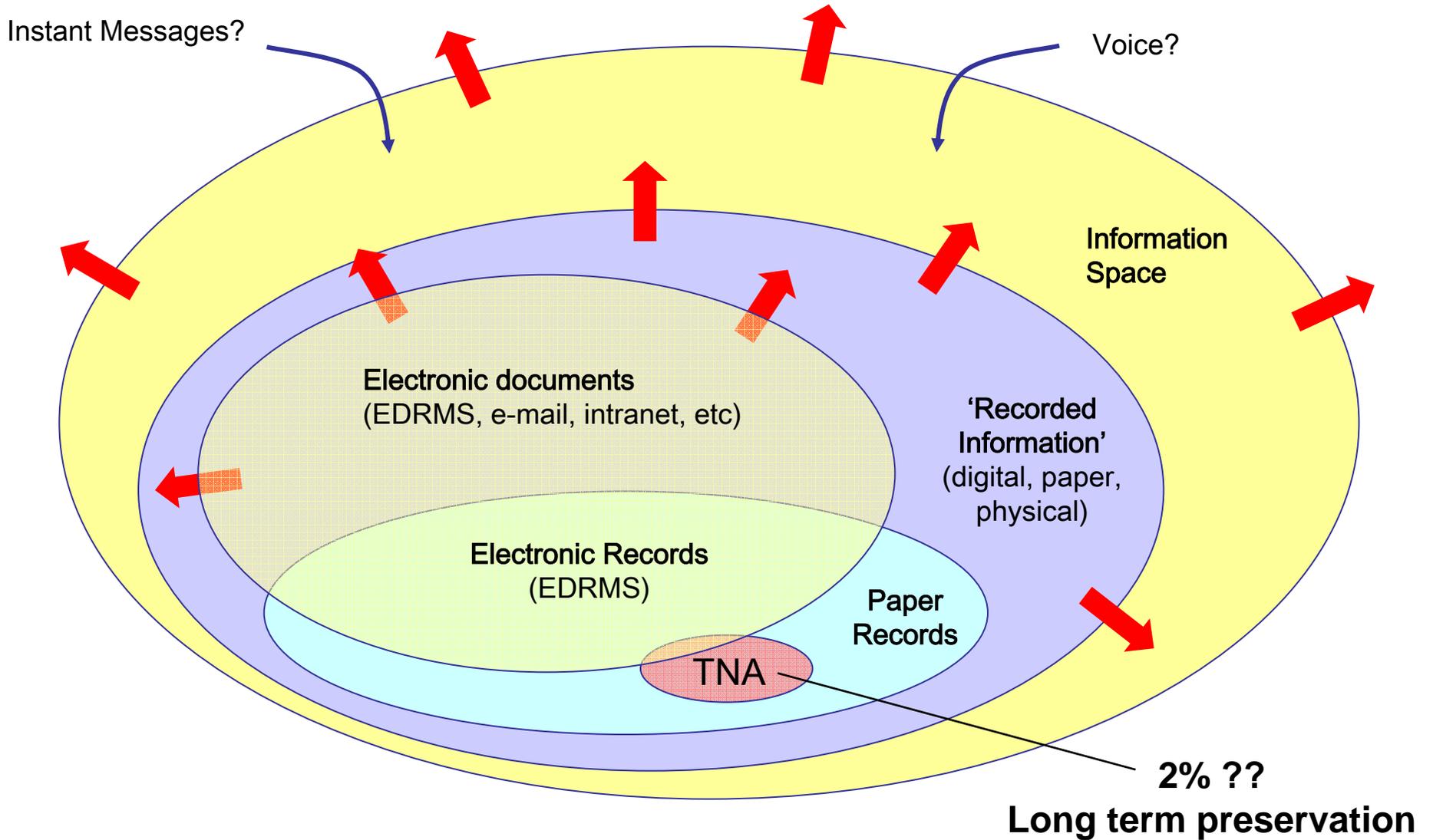


- **Introduction to EDRM**
- **Current approach to costing EDRM programmes**
- **Issues with current approach**
- **Multi-perspective approach to costing EDRM programmes**
- **Conclusions**

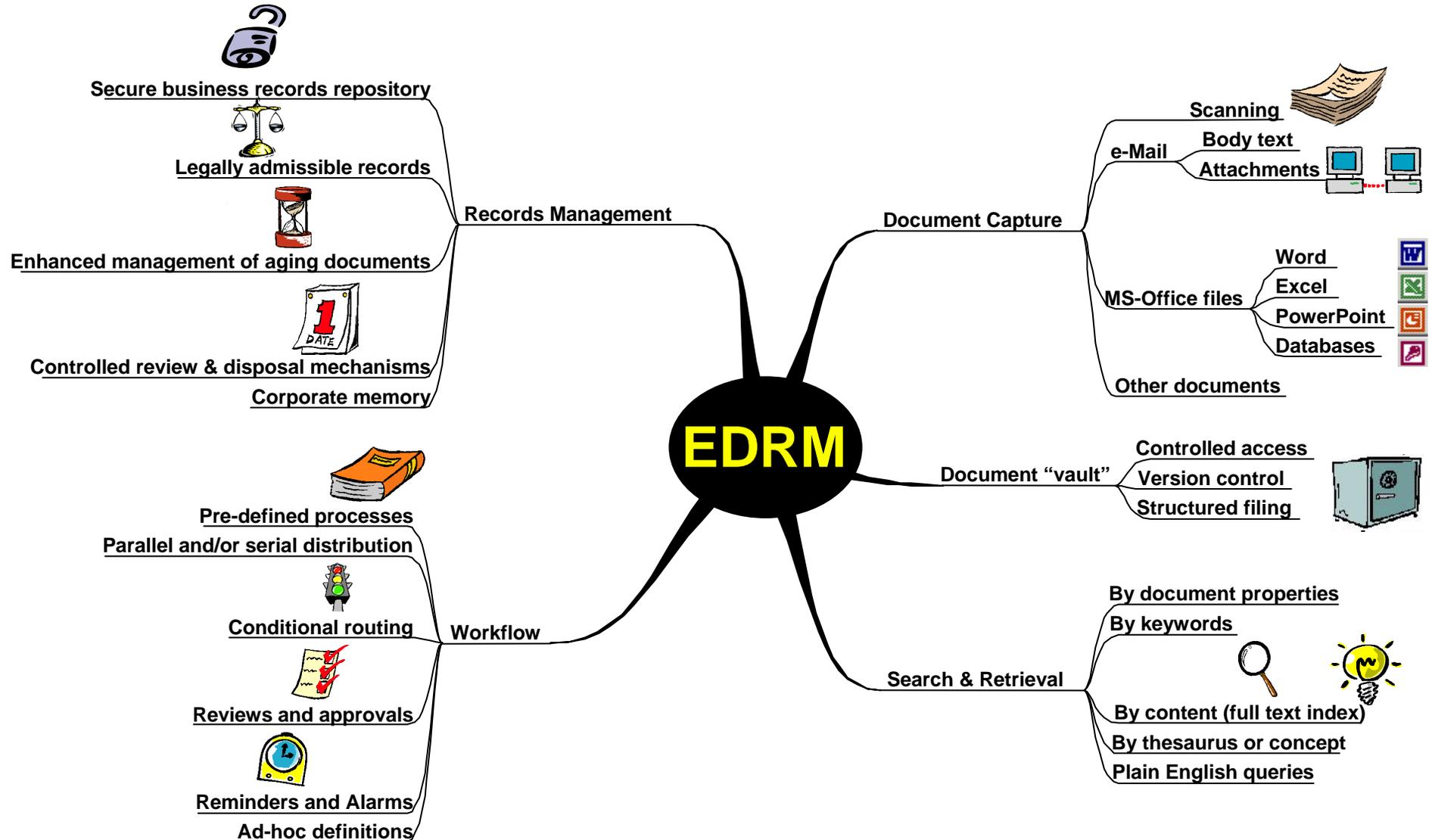
- **‘Modernising Government’ 1999**
- **Various Legislation**
 - *FOI Act 2000, s46 Code of Practice*
 - *Data Protection Act*
 - *Environmental Information Regulations*
- **Business Drivers**
 - *Governance over corporate information*
 - *Efficiency savings*
 - *Flexible working*
- **Need to do something!**
 - *Electronic records*
 - *E-mail management*
 - *Content management of intranet/internet*
 - *Case working, forms processing etc*

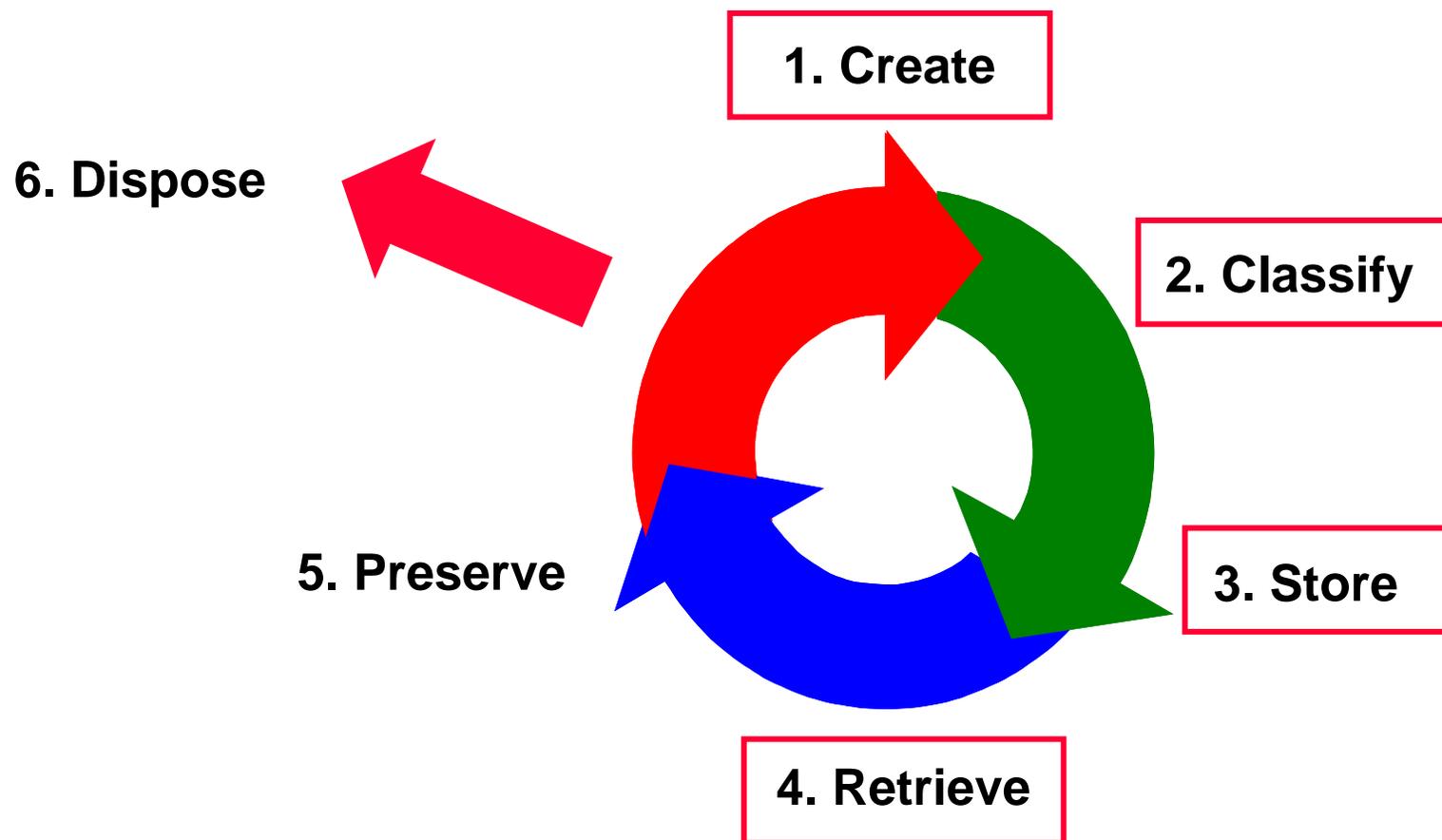


Expanding Scope of 'Recorded Information'



EDRM - "Big Picture"



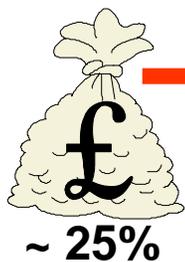


User focus is document management, not records management

Typical EDRM Project



EDRM product selection

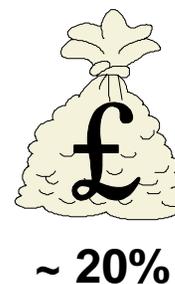


System design (classification scheme, retention schedule, metadata, security and access etc)

Product configuration

System Build

Testing



Training design & development

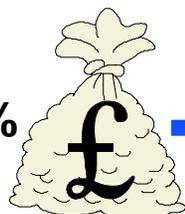


Go-live

Training delivery

Data migration

~ 40%



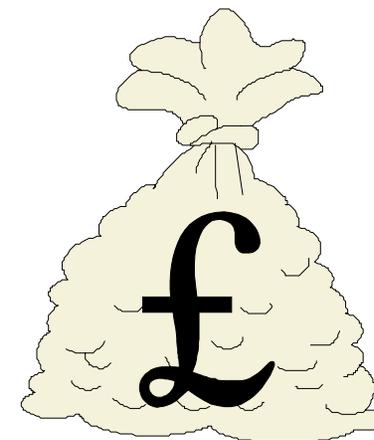
Supporting 'change management'

10s of £M ...
18 mths - 2 yrs

Issues with current Costing Approach

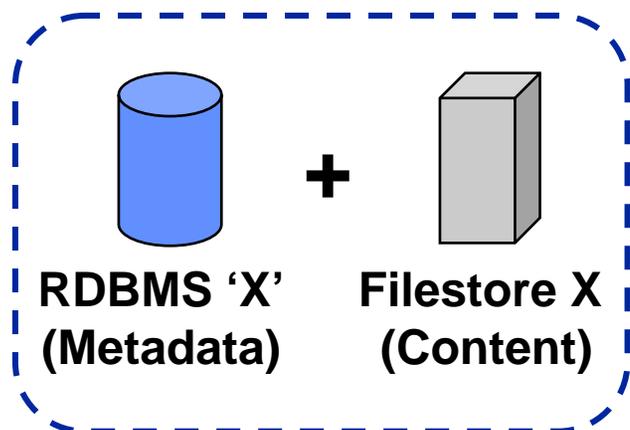


- **Focus almost exclusively on initial implementation costs**
 - *Project focus is short term e.g. 0 – 3 years for an EDRM project*
- **EDRM system design**
 - *EDRM, as designed currently, will work! [i.e. based on paper paradigm, one repository]*
 - *Change effort required to implement*
 - *Data migration in and between EDRM systems*
- **Immaturity of EDRM products**
 - *Possible complicated upgrades e.g. technical architecture changes*
 - *Upgrades will be straight forward [e.g. like upgrading MS Office] !!*
 - *Different EDRM products - 'flavours of the month'*
- **EDRM market place volatility (due to acquisitions/mergers)**
 - *Possible large data migrations downstream as a result*
- **Not yet fully proven functionality**
 - *Export of records to TNA or OGDs*
 - *Import of records from other EDRM systems or OGDs*
 - *Digital preservation*

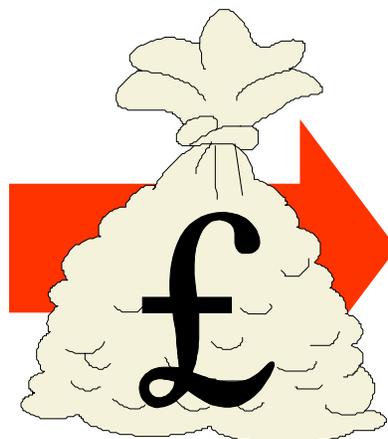


**Cost
Implications?**

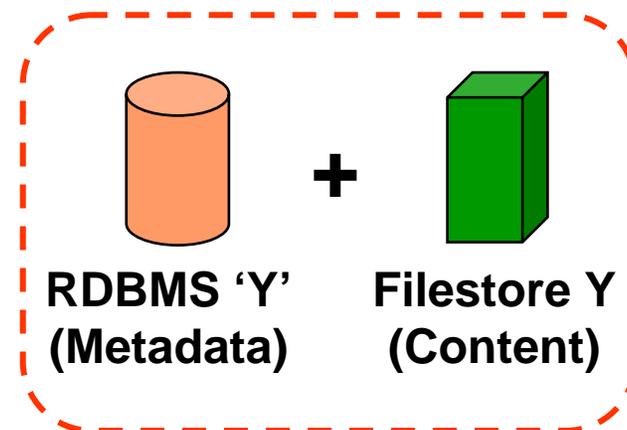
EDRM Product 'A'



- Metadata held in Database X
- Content held in Filestore X
- ~ Millions of documents by year three?



EDRM Product 'B'



- Develop bespoke 'datapumps'
- Build and test on development system
- Test dependent application interfaces
- Migrate (authenticity, reliability & integrity)
- Manage the change
- Have to migrate metadata held in Database X to Database Y – different table structures?
- Content held in Filestore X must be migrated to Filestore Y
- Have to test that content has been migrated, together with associated metadata

Reducing Costs



■ Implementation Costs

- *Simpler design*
- *Easy to use product*
- *Less change burden on the user*

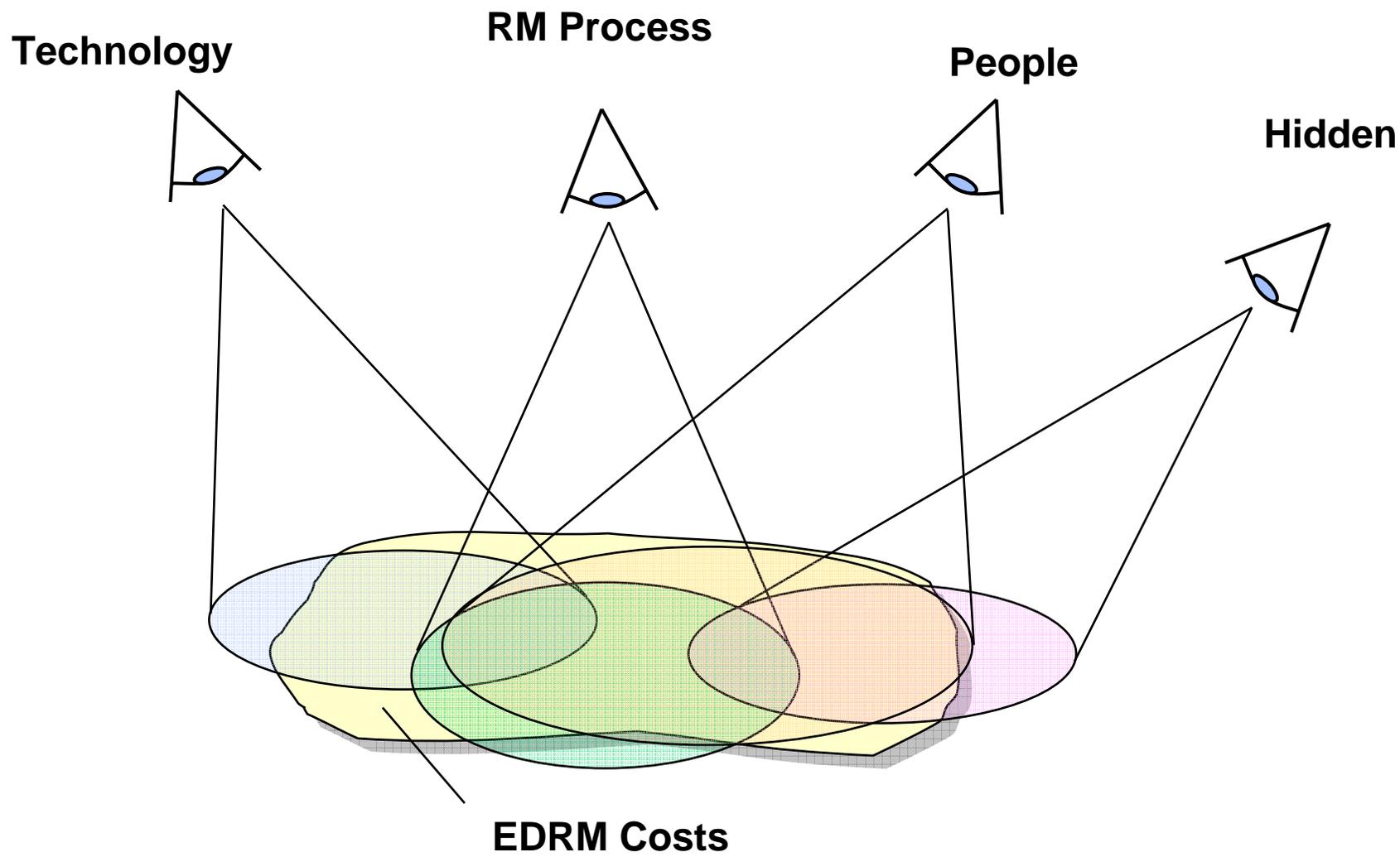
■ Costly Data Migration => need better Interoperability

- *Standards based file store*
- *File formats*
- *Interchange standard eg XML*

■ Expensive ongoing change support and system maintenance

We need a better definition of EDRM Costs...

Multiple Perspectives of EDRM Costs



Technology Costs



- **Software**
- **Hardware**
- **Configuration**
- **Infrastructure Integration (e.g. remote working)**
- **Application Integration (e.g. central repository)**
- **Testing**
- **Maintenance & Support**
- **Business Continuity**

Records Management Process Costs



- **Capture**
- **Store**
- **Retrieve**
- **Review**
- **Archive**
- **Dispose**

People Costs



- **Process Design**
- **Specialist Training**
- **User Training**
- **Classification System Design**
- **Working Practice Development**
- **Scanning Effort**
- **Problem Resolution**
- **New Joiners**

Hidden Costs



- **Adapting to Organisational Changes**
- **System Migration**
- **Review and Disposal**

Cost Summary



£/User	Implementation	Annual Live Running	Migration (3-5 years)
Technical Configuration Hardware Software	£100 - £2000 £200 - £600 £600 - £2000	£20 - £200	? Interoperability
Process	£500 - £2,500	? Folder Mgmt	
Change/Trg	£800 - £4,000	? Support	? Change
Management	£300 - £1,500	?	
User Effort	£300 - £600	?	?
Total	£2,800 - £10,000		

Affordability?

Benefits



- **Productivity (if high paper volumes)**
- **Storage (in the longer term)**
- **Service Responsiveness (if carefully designed)**
- **Compliance**
- **Cross-functional opportunities (if viewed strategically)**

Conclusions



- **EDRM projects are not representing whole life costs of managing information**
 - *We're just understanding the affordability of EDRM*
- **Significant uncertainty over full costs**
- **EDRM is expensive, but costs have to come down as market matures**
- **Multi-perspective approach to costing gives a better indication of costs**
- **The costs are in EDRM implementation are driven by:**
 - *Complexity of EDRM system design*
 - *Associated business processes*
 - *Potential migration complexity*
 - *Potential frequency of migration*
 - *Resulting 'Change Management' effort*



End

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