

Case Study:

Impact Systems Executes Compliance-in-a-Box™ Deployment Solution for an International Engineering and Construction Management Company



Business Overview

An international facility management, engineering, and construction company that provides best practice project and services management to a wide array of markets, including life sciences, healthcare, manufacturing, transportation, government and telecommunications, had discovered a variety of home grown systems to manage content across one of their customer's enterprise. The company was in need of an enterprise content management (ECM) system to manage projects and an immense amount of service-related documents, ranging from contracts to specifications to very tight procedures – across its various departments.

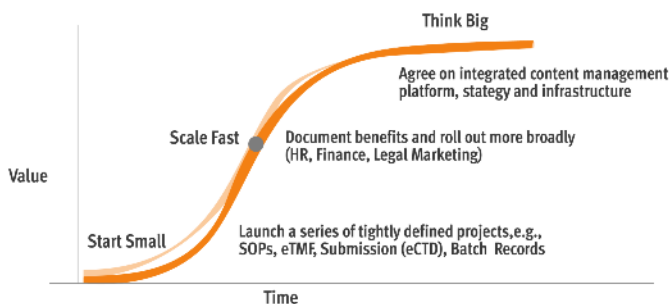
A very large government project with tight regulatory requirements – managing a salt water purification facility – was a big driver for this customer's need for an enterprise application. The company was managing this large-scale project via paper processes vs. an electronic means, which was not only inefficient but left them in a vulnerable position with regard to opportunity for procedural errors. The company needed an enterprise application that would control their exposure to liability and withstand the requirements of government agencies with regard to audit trails and documented procedural follow-up. As a start, they sought to streamline their complex procurement and invoice payment process, gain efficiencies, improve internal collaboration and speed internal approval processes.

Challenges

Challenges included the company's volume of documents in over 200 document categories such as purchase orders, invoices, Departmental and Program procedures, submittals, overtime requests, and drawings. In every case, the client needed to streamline document authoring, establish relationships/associations to different document categories such as invoices to purchase orders, incorporate proper security into their work processes, and manage content across their enterprise. Another challenge the company experienced and sought to solve was an increased volume of documents which added complexity to their approval and tracking processes.

Solution

CiB Philosophy: It's not about technology but successful organizational adoption of technology



The customer engaged Impact Systems (Impact) to identify the approach, solution, deliverables and service offering that would best meet their enterprise content management needs. It was determined that a Compliance-in-a-Box (CiB) Standard Operating Procedure (SOP) Solution would provide the foundation for the compliance and control software needed. Since CiB is a proven, best-practice enterprise application in the heavily-regulated life sciences industry, the customer was confident that CiB would be able to withstand their governmental compliance requirements.

Built on top of EMC® Documentum® Enterprise Compliance Platform, Impact's CiB SOP solution uses EMC Documentum Compliance Manager (DCM) configured for SOP work processes and management, along with documentation and a test script package to verify application installation and functionality. The result is a fully functioning, validated Documentum Compliance environment that is content-ready.

The CiB philosophy is about starting small, with the ability to scale quickly and at the same time, have the ability to “think big” with respect to a long-term enterprise solution. The intent of CiB is to get a working EMC® Documentum® application up and running within six to eight weeks from installation in a Test environment through implementation in the Production environment. The use of this pre-defined solution with a tightly controlled project scope and set of configurations provides results in a condensed time frame, and prepares customers with a solid foundation for extended use of Documentum and the ability to scale up on their own timeline as needs arise.

Upfront Planning

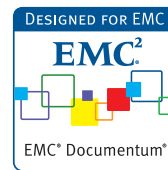
Prior to beginning the project, Impact Systems held planning sessions with the client to define the needed doctypes, processes, approval roles and business roles. Impact Systems and the customer determined that the Compliance-in-a-Box solution framework would be an excellent foundation, and would allow the client to incorporate multiple doctypes very easily. Out of their 200-plus document types, the client chose five different document categories for the initial rollout: Procedures, Purchase Orders, Invoices, Submittals and Overtime Requests. During the initial discovery workshop, Impact consultants leveraged and extended the CiB configured lifecycles and other configuration parameters for rapid implementation. Similarly, validation scripts were modified to verify the work processes used by the different document categories.

Description of Process, Services and Deliverables

Impact Systems was engaged to install, configure and implement CiB in two environments (Test and Production), and support the customer's validation of the solution.

Test Environment

Impact Systems installed the Documentum Compliance Manager (DCM) and associated Documentum software, and executed the application IQ (installation qualification). The pre-defined SOP and other configurations were deployed using Impact System's Q-Config™ proprietary software tool. Q-Config™ allowed the customer to configure the environments in a repeatable and controlled manner. The configured application was then verified for validation readiness and reviewed with the customer in an on-site orientation and knowledge transfer session. Impact worked side-by-side with the customer during execution of the test scripts in the Test environment, providing thorough knowledge transfer to the customer.



The "Designed for EMC Documentum" accreditation is a mark of quality and value that demonstrates that Q-Config™ has successfully met a comprehensive set of EMC Documentum criteria for good design and quality integration.

Production Environment

Impact installed the DCM and associated Documentum software in the Production environment, and executed the IQ scripts. The pre-defined SOP and additional extended configurations were transported using Impact's Q-Config™ software. Q-Config™ allowed the customer to transport the configurations from one environment to another in the same repeatable, controlled manner, in a matter of hours. As part of the CiB solution, Impact Systems provided the customer with Q-Scripts™, a total validation package.

Summary: Outcomes/Benefits Realized

A fully functional, validated, content-ready Documentum Compliance environment was up and running within weeks. The use of best practice project management methodologies, documentation frameworks, the pre-defined, tightly controlled CiB project scope, and set of configurations provided visible, measurable results in a condensed time frame, and prepared the customer with a solid, scalable enterprise content management foundation. The rapid installation and implementation provided the customer with significant cost savings and reduced customer IT involvement, for an accelerated return on investment.

Most importantly, the CiB solution provided the customer with peace of mind that the most recent versions of critical procedures are being adopted and followed immediately, hence reducing risk. With the new EMC Documentum system, all team members involved in a particular process know the status at all times – a big contrast to the old paper system. And, procedural approval times were dramatically reduced from three to five weeks down to one week.

Future plans for the customer include deploying EMC® Documentum® across additional company departments, and consideration for using the enterprise application to manage their vast library of Forms and over 13,000 CAD drawings.

About Impact Systems

Founded in 1996, Impact Systems provides deployment and migration services for Enterprise Content Management (ECM) systems. Impact Systems specializes in deploying business solutions such as Compliance-in-a-Box for clients in the life sciences (medical devices, biotech, pharmaceutical and healthcare) and other regulatory markets. Impact's deployment services are focused on helping organizations develop a roadmap to ECM implementation success, including up-front assessment, planning, installation, configuration, customizations, validation and deployment. Additionally, the company has developed a proprietary suite of configuration management, content and metadata transfer, and bulk load software tools that provide significant time and cost savings for deployments, migrations and ongoing electronic content needs. Impact Systems is a member of the EMC2 Consulting/Select Services Team, and is an Adobe® and Kofax partner.