



document management

eBenefits of document and change management

- Ensures secure rapid retrieval of documents by authorized users via flexible indexing
- Simplifies document searches by accepting word strings and supporting free text retrieval (FTR)
- Ensures availability of up-to-date, accurate information on demand with revision control and check-in and check-out features
- Easily accessible from other familiar business applications such as ERP, HR, and MMS through a flexible application programmer interface (API)
- Scales easily for enterprise-wide deployment
- Maintains data integrity throughout its lifecycle

The Enterprise Informatics way

eB DM (document management) is a powerful, full-featured enterprise information management solution for organizations that need to effectively, efficiently, and *accurately* capture, manage, control, retrieve, distribute, and archive all types of information across the enterprise.

eB handles information in all forms—from paper-based to computer-based. eB integrates with popular CAD tools like AutoCAD and Microstation, offers a tight integration with Microsoft SharePoint that provides an exceptional integration with Microsoft Office and eB QuickLink provides an extremely powerful, yet simple to use foundation for integrating with other enterprise systems like ESRI/GIS and IBM/Maximo.

Not only does eB DM address the entire lifecycle of information, it does so *in context*. eB is unique in its ability to manage connectivity to all other relevant information, allowing organizations to reduce the cost of meeting compliance requirements, minimize business risk, improve decision-making, and optimize process efficiency.

eB DM comprises four key functional areas:

- Document management
- Change management
- Records management
- Distribution

The functions of document management and change management form the cornerstone of eB DM. The function of records management is its capstone.



Enterprise Informatics



eB accurate and relevant information on demand





Document management

Enterprise Informatics extends traditional document management to include change and records management to the core document management capabilities of capture, linking, revision control, workflow, security, reporting, storage, distribution, and others. These capabilities provide a complete lifecycle management solution for enterprise information.

With eB, users can identify, capture, and query documents as well as associated document data and manage document change, disposition, and distribution. Users in complex, distributed organizations enjoy quick and easy access to documents and their contents while extremely flexible access controls and permission mechanisms ensure the safety of company data.

What's more, documents may be identified in the context of functional product and process areas that represent the organization of the enterprise as a logical way of storing and accessing documents.

Users may define a document with reference to any data stored anywhere on any media in any format, including paper, microfilm, electronic, and so on. eB stores electronic master copies of documents in one or more predefined electronic read-only vaults, and can specify multiple locations for hard copies of documents.

Data capture

Imaging. eB DM provides powerful imaging capabilities to convert paper-based documents into digital images. eB scans large batches of documents and barcodes them to streamline the indexing process. eB stores images as data files along with their associated index data in the secure eB vault. Built-in optical character recognition (OCR) functionality converts scanned data into text.

Document indexing and linking

Document indexing is the process of identifying and assigning unique numbers and revisions levels to documents. Inherent attributes such as the title, type of document, status, effective date, date obsolete, as well as user-defined attributes and data serve to identify and control information.

eB Suite improves productivity throughout the enterprise by ensuring easy access to information along with uncompromised information integrity

In addition, eB maintains cross references to other documents, references to superseded documents, and references to locations and the status (available, issued, lost, destroyed) of various document copies.

The eB virtual folder capability creates document master record indexes. Documents can exist in one or more virtual folders and may be structured hierarchically within different group concepts; for example, a system description document could exist in a folder called operation and/or maintenance. This allows the creation of multiple views of information to suit the requirements of many business processes in the enterprise.

Document relationships and structures

Documents may be linked to each other in a hierarchical manner, and document relationships may be classified such as: *contained in*, *propagated from*, or *referenced by*. This allows the user to create and define compound documents and inter-relationships among documents managed by the system.

Document workflow

eB automates business processes and routes documents to the appropriate people within the enterprise for follow-up action. Workflows are defined, constructed, and maintained with an easy-to-use graphical design tool.

Document vaulting

eB ensures that all electronic document sources are secure. The media management server application manages the vaults and ensures that the files are routed to local, or distributed, repositories on magnetic or optical media. eB's unique distributed vaulting capability utilizes a self-repair feature to ensure the integrity of the vault and performs path analysis to optimize performance.

Document viewing

eB Suite incorporates the industry leading Spicer Image a•X toolkit and Spicer ViewCafe to view hundreds of industry-standard file formats. This universal viewer provides a single point of access to all of the documents and information stored in eB - from PDF and office documents to CAD files and drawing formats.

eB Suite produces many standard reports

- Document detail report
- Document structure report
- Change effect analysis report
- Change detail report
- Distribution receipt forms
- Change notification letters
- Functional item list report with associated documents
- System administration report

Document copy management and distribution

eB Suite offers complete control over document distribution and circulation. Copies that exist on different media types (electronic, microfilm) can be distributed or circulated to specified persons or to pre-defined distribution lists. The system also notifies holders of copies about changes, prints transmittal notices and labels, and notifies document holders when their document return dates have been exceeded.

Notes and email notifications

With eB, notes can be attached to documents and change requests. These and other system notifications can be broadcast through email or SMS.

Information access

A number of user-friendly, flexible access capabilities assist users to locate information in the eB system. Because information is linked multi-dimensionally, there are many ways for users to search using powerful querying mechanisms. Moreover, a two-level keyword system allows users to associate one or many keywords to any entity. In addition, SQL-based data extraction enables users to write and save unique SQL queries in order to extract customer-specific data from the eB database.

Reports

eB Suite produces many standard reports. (See sidebar.) Information related to persons, organizations, projects, and locations can be managed by an administrator who defines specific attributes, such as document types, media, distribution directives, and document characteristics.

Access permissions and document security

The eB administrator allocates permissions to each user defined in the system. Permissions define the exact set of activities that may be performed by a user. Any permissions denied to a user are hidden from menu items, buttons and options for that user, providing a role-based user interface that simplifies the user experience.

Comprehensive access controls restrict access to information using various security mechanisms. Project-based access control may also be applied where required, allowing only project members access to project-restricted information, ensuring that enterprise information is available only to authorized personnel.

Change-effects analysis reports contain:

All the affected documents defined in the change

Any other documents that form part of, are contained in, referenced by, or propagated from the affected document

Any parent document that contains an affected document

Related change documents—other change requests containing the affected document(s)

Holders of documents affected by the change

Virtual folders or functional items associated with the affected documents

Any work orders or tasks related to the affected documents

Change management

Practical rules built into eB Suite provide traditional revision control capabilities for both major and minor revisions. In addition, eB offers powerful features for varying levels of document change control.

Document change registration

When documents are approved for change control, eB Suite controls the document and its attribute data with a formal change process. When a user registers a change request, the system captures the reason for and description of the change, the party requesting the change, as well as the document that is primarily affected.

Document change-effects analysis

Once a change request is registered and the primary affected document(s) identified, the system can be asked to perform a change-effects analysis. (See sidebar.)

These reports allow users to identify and incorporate other affected documents to a change request, ensuring that all related documents are taken into consideration during the change process. Change-effect analysis is the key to improving information quality, consistency, and overall information integrity.

Change process and progress monitoring

eB Suite provides a change wizard to assist the user in associating one or more change events to the document change process and monitors the progress of a change request by providing status details for each affected document.

Document change history

eB Suite traces the complete lifecycle of changes made to documents and compiles an accurate revision history.

eBenefits of records management

Effectively manages all corporate records through their lifecycles to ensure compliance with regulatory and corporate policies

Creates and manages file plans for consistent, accurate records classification

Creates and reliably administers records retention and disposition rules

Automatically identifies aged records and obtains final authorization for transfer to long-term storage or destruction

Easy for business users and records administrators to use

Conforms with industry standards DoD5015.2, MoReq and UK PRO

Records management

Enterprise Informatics extends eB beyond document management and change control to include a powerful records management capability that provides complete lifecycle management of all corporate records and associated information.

eB's records management empowers the administrator to file corporate records in keeping with the organization's policies to meet regulatory compliance and reduce the risks associated with audit and litigation.

eB's records management is fully integrated with all eB applications so that any media within the eB system can be declared a record and be controlled according to relevant file plan policies.

Unlike most record management systems, eB records management uses enterprise modeling capabilities to link records to other objects managed by eB, such as items, requirements, projects, locations, people, and assets. This ability to manage records *in context* greatly enhances their value and makes it easy for users to search for, locate, and retrieve records and view all its related elements.

Record Declaration

Traditional records management requires an explicit declaration of a document to become a record. With eB, rules can be defined to automatically declare a document a record and that record will be managed through its lifecycle.

eB administers the record as a corporate asset according to the policies in the file plan under which it is classified. Once under eB control storage locations and destruction dispositions are controlled by definable rules.

Record classification

Typically, enterprises define one or more file plans for classifying all corporate records. eB file plans are hierarchical structures of business activities and subjects. They not only assure a standard definition and description for all records, but also associate appropriate retention and disposition rules with each record so that they are certain to conform with relevant regulatory and corporate policies.

Record management reports include:

Destruction history for each record folder report

Media location report for all media items of a record

Disposition order report

Disposition status report

Record administration

eB offers records administrators an extremely powerful and flexible interface to perform a wide range of activities. These include:

- Create and manage file plans for records classification
- Create and manage folders including dividers that help organize and group records belonging to a file plan classification
- Change the status of folders from active (open) to inactive (closed)
- Create and manage records retention and disposition rules and assign them to record folders and files
- Search and identify aged records for disposition to long term storage or destruction
- Place a hold on specific records to prevent their destruction in the event of litigation or legal discovery orders and register them in a hold folder pending further investigation
- Create record disposition orders with workflows to obtain final approval from authorized personnel before record destruction
- Automatically purge all media items related to record repositories and give authorization to shred paper copies
- Maintain records of all disposition orders in application-neutral XML format to provide long-term reference
- Create backup copies in repositories located in different locations to ensure compliance with strict regulatory guidelines, such as nuclear GL 88-18, as well as with disaster recovery governance rules

Enterprise Informatics

Enterprise Informatics offers a commercial information management solution that ensures the integrity of controlled information by uniquely managing its connectivity to all other relevant information. By building bridges between documents, records, assets, people, processes and projects, our solutions create an ecosystem for the rapid access of accurate information in context.

With eB, our Enterprise Information Management (EIM) solution, organizations reduce the cost of meeting compliance requirements, minimize business risk, improve decision-making, and optimize process efficiency.