Introduction of Documentum D2 in Contract Management

A major German electronics enterprise has been managing its highly sensitive contract documents with the Documentum document management solution from EMC² for several years. However, the old system no longer met the requirements of the employees over time. Now fme AG has developed a contract management solution based on the current EMC client Documentum D2. This has successfully replaced a solution based on the EMC Webtop which has existed for many years. A preceding Proof of Concept (PoC) ensured that the configurative approach of the D2 client also meets the requirements of the specialist departments, thus providing investment security for the company. For the customer, the results of the PoC served as an important decision-making basis for the implementation of Documentum D2 with the support of fme AG. In addition to migrating the application to a new client technology, the existing data was corrected and migrated using the fme migration center.

Starting Point

For the major German electronics enterprise, EMC Documentum has been the system of choice for the management of its contract documents for many years. A customized Webtop client has been used so far. However, the application has grown a lot over time, becoming very complex in several areas. For example, it was often no longer possible to find contracts in a reasonable time due to the deep folder structures and the lack of a flexible search function.

Since the contracts in part contain highly sensitive information, compliance with the tightest security standards is essential – not only outside but also within the organization. A complex authorization model was implemented in order to accomplish this. Central IT has been responsible for the management of roles and rights to date. This demanded a lot of time from the IT department and resulted in wait times for the specialist departments.

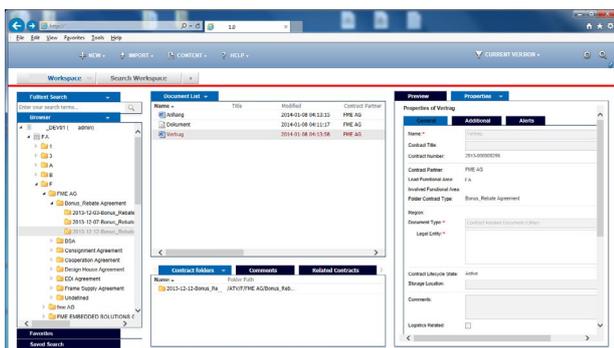The optimum implementation of changes and adaptations was often not possible with the old client, or only with in-creased technical effort and high costs as well as time delays. Changes required editing the source code of the client and therefore always had to be coordinated with the IT department.

Overall, the previous client, according to the customer, was no longer well accepted by the specialist departments because of its outmoded interface, the sometimes very long response times and the complex, time-consuming functions. Using the system was increasingly perceived as no longer assisting with the work itself. The large number of attributes also meant that these were often not maintained in full. This reduced the data quality and therefore also the quality of the search results.

Objectives

Since up to 1,000 users will be working with contract management at distributed sites in the medium term and the customer did not intend to change platforms as such, EMC D2 appeared to be the optimum solution for a new client. EMC developed this client with a particular emphasis on a modern, user-friendly interface. Thanks to the widget and workspace concept, each user is able to put together their own personalized views very easily – optimized for the assigned tasks.

This extensive redesign was intended to enable contract management employees to once again work quickly and efficiently while providing relief for the IT department. The ‚configuration instead of programming' concept makes it possible for IT to quickly respond to changes since the D2 configuration interface supports changes to document-specific functions such as workflows, properties, searches, document life cycles, and rules for automatic links or the assignment of rights. No programming whatsoever is required

User interface for contract management in the Documentum D2 client.

and the changes can be implemented immediately if desired. Maintenance effort and costs for version updates are also reduced significantly since custom programming is now largely eliminated. The flexibility of future changes was also taken into account here – both from a functional perspective and with regard to upgrades to the Documentum or browser version.

In order to determine the future compatibility of the investment in the new technology, a proof of concept was prepared in cooperation with fme prior to the project as such. This led to a clear decision in favor of D2 as the basis of a contract management solution.

The new client was subsequently introduced with the support of fme AG and the solution was implemented for contract management. The project was launched with the following objectives:

- Straightforward and intuitive user interface by using the D2 client

- Providing all required functions for contract management

- Implementing the functions with manageable technical effort and within a reasonable time frame

- Covering most of the requirements through standard D2 configuration features

- High acceptance of the new solution by the specialist division

The Solution

A team of D2 experts from fme worked closely with the customer on site. The requirements were identified in joint workshops with end users from the specialist division. Then a concept was developed for their implementation in D2. Implementation of the requirements commenced in parallel in order to allow the customer to continuously observe the operation of the client and the technical feasibility of the requirements.

The following processes were examined among others:

- Contract preparation

- Contract management and processing

- Filing structures

- Contract monitoring

- Various search options

- Navigation within the application

- Display (including inline viewer option)

- Reports

- Security concept (including roles and rights)

- User administration

End users in the various specialist departments were directly involved in the process from the outset through user accep-

Benefits

With this project, the major German electronics enterprise was able to provide the specialist division with a modern contract management solution that is suitable for future use thanks to the use of the new D2 technology. Individual user requirements were identified and successfully implemented in the course of the project. Consistently positive user feedback after putting the application into use confirms that acceptance has been significantly improved through the use of the D2-based client compared to the previous application. The system provides optimum support for users in their daily work, allowing them to file contracts in a logical structure and find them easily when needed. Monitoring deadlines and cooperating in the course of contract preparation and processing have been greatly simplified thanks to the new functions. Existing data was corrected, consolidated, and augmented with available information in the course of migrating the legacy data.

tance tests and feedback loops. This ensures that optimum support is now provided for the technical processes and that the new system matches the actual mode of operation. In order to promote user acceptance, the implementation was followed by training and the existing contracts were migrated from the various legacy systems. The fme ‚migration center‘ as the migration tool with a dedicated D2 adapter was used to migrate the data to the new repository. This ensured reliable transfer of the data with rules-based verification and restructuring. To a certain extent, automatic error corrections could even be carried out for incorrectly populated attributes.

Outlook

Now that the new solution has been implemented in contract management, the next project phase is already being planned. The application is to be expanded on the basis of new customer requirements by adding additional functions such as automated deadline management for contracts. After an initial start-up phase, the requests for improvements and extensions from the specialist division are to be identified, evaluated, and taken into account for the expansion.

Technology

- Documentum D2 client version 4.2

- D2 + pack (PDF Management, Office Integration, D2 Recycle Bin) 4.2

- EMC Advanced Document Transformation Services (ADTS)

- EMC xPlore

- fme migration center 3.2.3

- fme dqMan 5