

M41 Importing Electronic Records into an EDMS – a Case Study

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Importing electronic documents into an EDMS is not a difficult task. In fact, from a technical perspective, it's quite simple! The big issue is.....once they're in there, can you find them again? Making cavalier assumptions about the retrieval capability of the application is a very bad idea. Statements like "Don't worry, once you get it into the system, you can set up a search criteria to find anything", will get you into trouble every time. If you haven't done your homework, you could be in for a few surprises.

This session will look at a typical project in a government organization where the client discovered that the 'day-forward' approach was not sufficient to meet the information needs and had to import a large number of documents from both their shared drive and their e-mail system into the document manager. In preparing to undertake this work, the client assumed that a few documents with cryptic names would have to be re-named and then everything would be bulk imported. On closer examination, it became apparent that it would not be so simple.

Issues that we will address include:

- Naming conventions
- Access rights
- Bulk importing
- E-mail attachments
- Retention
- Quick searches
- Keywords
- And more

Whether you're importing documents one at a time, or in bulk, this session is intended to illuminate the issues that you may be facing so that you can make informed decisions on how to proceed.