

DEFENSE CONTRACT AUDIT AGENCY (DCAA) DEPLOYS AN OPEN TEXT LIVELINK RECORDS MANAGEMENT SYSTEM

Description of Challenge

The Defense Contract Audit Agency (DCAA) is an agency consisting of 4,000 employees with major organizational components located at their headquarters in Fort Belvoir, VA and five regional offices located in Smyrna, GA; Lowell, MA; Irving, TX; Philadelphia, PA; and La Mirada, CA; and 300 field offices located throughout the United States and overseas. DCAA's Records Management initiative began with their Integrated Records Information Management System (iRIMS), which was an electronic version of the Agency's paper filing system in conjunction with DCAA 5015.1, Files Maintenance and Disposition Manual. DCAA chose to improve their existing iRIMS system to provide document management, project collaboration and workflow functionality by using Open Text's Enterprise Content Management solution for Records Management, Livelink, a commercial off-the-shelf (COTS) software package.

Open Text developed a LLRM Pilot process. The approach was to serve as a means of articulating how to align the solution with the organization's business and information technology goals. The intent was to assess the Enterprise use of iRIMS for Records Management (RM) and LLRM, identify the dataset to migrate from iRIMS to LLRM, and demonstrate proof of concept. As a result of the success of the pilot program, the DCAA Headquarters elected to complete Phase 1 of the project, which consisted of the successful completion of Livelink upgrade, Records Management module customization, and data migration.

The Solution

DCAA turned to Momentum Systems to develop an Open Text Livelink solution to facilitate overall Records Management, as well as to automate workflow Records Management processes. Momentum applied its life-cycle methodology and implemented Open Text Livelink with customize Records Management features. This includes a Livelink 9.7.1 upgrade and deploying Livelink document management and collaborative capabilities via a community, information, and security structure. Momentum designed a LLRM Security Model to mimic the current iRIMS access control functionality.

The Records Management Module out of box features that were utilized included Classifications, Records Series Identifiers, and Disposition Reports. The RM Classifications and associated Records Retention Schedules were applied to LLRM folders/records and the disposition reports were ran at the record or folder level. An RM workflow that handles the approving, deletion, and moving of documents was also configured.

The custom Records Management features that Momentum created were the RM Customized Screens created in .NET. The request for custom RM screens was to assist users with the transition from iRIMS to LLRM and to help eliminate errors in data entry. The RM Customized Screens provided a customized page for adding documents, viewing documents info, adding folders, and viewing folders info using only the required data. The customization also includes a script to create user groups and a standard set

of folders, and apply proper group access/permissions automatically upon creation of a new organization.

Momentum also provided a Data Migration method which consisted of how to perform the data migration and assistance with the iRIMS data migration to LLRM in regional phases. Momentum provided the Regional Training session as well as the Region Data Migration.

Success Criteria

- Ease of use and access
- Good searching capabilities
- Ability to access one repository for information
- Accessible to all authorized pilot participants
- Accurate, reliable, and secure
- Data migrates over from iRIMS into Livelink RM as anticipated by DCAA

ONGOING HELP DESK AND LIVELINK SUPPORT

After the Livelink solution was implemented, DCAA needed a vendor to provide ongoing help desk and operational support for their records management application across their large dispersed user base. DCAA turned once again to Momentum Systems, Inc. (Momentum) as their partner to provide ongoing operational support for the new Livelink system. Since Momentum had been instrumental in developing, deploying and training DCAA on their new Livelink Records Management solution, Momentum was the ideal candidate to provide ongoing Livelink help desk support.

Momentum is currently on-site at DCAA headquarters providing Tier 2/3 help desk and operational support services to the Livelink user community. In this capacity, Momentum is responsible for monitoring the DCAA Livelink records management application in the test and production environments to ensure that the system is up and running on a consistent basis. In addition to keeping the system operational, Momentum's support also includes manning the help desk, answering calls from users, providing solutions to their problems, entering relevant data into the help desk tracking system, working with DCAA Regional System Administrators to establish and maintain user rights within the system, and generating monthly reports. All requests for assistance, via the telephone or E-mail, are logged, tracked and acted upon within four business hours of the initial notification.

Momentum has developed a true partnership with DCAA by working closely with the technical staff, user community and management. As any Livelink issues are discovered, Momentum works to identify the problem and apply the solution in a timely manner. This includes working with DCAA network and database support personnel as needed to install and test all system upgrades and with the user community to keep them aware of any system modifications or changes for each software revision through system release documentation for the Livelink system. In addition, all work is documented and presented to management in monthly status reports providing details on calls, system bugs, change requests and a summary of system maintenance work so program managers and executives are kept informed. Momentum is the right partner to meet the on-going operational support needs at DCAA.

Success Criteria

- Centralized on-site Help Desk & Operational Support
- Timely resolution of user trouble tickets, user requests or application issues
- Maintain Livelink Records Management System & keep operational
- Logging & Tracking calls
- System Documentation
- Monthly Status Reports