

## Electronic Document Management Systems

### Key Issues to Consider

You should consider your operational and records management requirements, including the legal framework you operate in as a government agency, as well as your desired product features and agency-specific workflow in order to select an appropriate EDMS.

Use the questions below to consider whether to pursue an EDMS, as well as how to select a vendor. Take a long-term approach in discussing these questions. Consider the types of documents and records you create now and which types you may create in the future. Remember to think of your records as needing to be managed along a continuum, rather than in discrete stages.

### Discussion Questions

- What are our needs? What are the needs of all involved stakeholders?
- Do we want to use the EDMS just for workflow management or do we want to use it for records management as well?
- Which records do we want to capture and manage using our EDMS?
- Which formats do we use now and which formats are we likely to use in the future?
- What metadata do we need to include?
- How does the legal framework affect our discussion and decision?
- How do we use records now? How will we use records in the future? What records do we need to share and store?
- How do our records fit into our current workflow? How may we need to modify our workflow to accommodate an EDMS? At which points in our workflow do we need to capture records?
- How will we dispose of records in the EDMS? Will the system enable us to transfer, convert, and/or migrate records easily?
- What are the roles and responsibilities of groups and individuals in terms of electronic records management?
- What features are essential to us in a document management system? What features might be the most useful, but nonessential, elements of a document management system? What is our budget?

- How will we mesh a new system with systems currently in place (e.g., e-mail systems, databases, word processing systems)?