Information at the Point Of Performance

Integrated Document Management System (IDMS)

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The Hanford Site

• The Hanford Site is…
  • Located in the Southeastern corner of Washington State.
  • 586 Square Miles
• The original mission was to produce plutonium (1940’s – 1980’s).
• Today, our mission is to perform cleanup
  • Waste Treatment
  • Tank Operations Contract
  • Plateau Remediation Contract
  • Mission Support Contract
• The Integrated Document Management System
• Opentext product, called Content Server (Livelink)
  • Fully integrated, web-based product
  • Provides:
    • Collaboration
    • Workflow
    • Document Management
    • Records Management
• Deployed in 2002
IDMS Functionality Overview

- Workflow
- Search Retrieval
- Centralized Secure Repository
- Collaboration
- Document Management
- Records Management
• Dynamically route information and processes.
• Attach documents and folders to workflows while maintaining powerful document management and audit control.
• View and track all information added to each step including documents, disposition and comments.
• Automatically capture all actions from the audit trail for future analysis and improvements in a business process.
IDMS Functionality Overview

- Centralized Secure Repository
- Workflow
- Search Retrieval
- Document Management
- Records Management
- Collaboration
• Gather, capture, organize and search all of an organization’s knowledge assets from a central point of access.
• Break down time, geographic and departmental barriers.
• Event notification by email on a user determined schedule.
• Single, multiple user collaboration for resource documents.
• Pre-record or non-record space.
IDMS Functionality Overview

Centralized Secure Repository

- Workflow
- Search Retrieval
- Collaboration
- Records Management
- Document Management
• Securely store any type of document, file or object.
• Version control and revision management.
• Customize folder structures to meet the users needs – dynamic shortcuts point to any document, file or object within IDMS.
• Tiered permissions prevent unauthorized access.
• Comprehensive audit trail functionality to automatically record date and time of action, who performed the action and a description of the action.
IDMS Functionality Overview

Centralized Secure Repository

- Workflow
- Document Management
- Search Retrieval
- Collaboration
- Records Management
Records Management

- Retention and disposition
- Physical and Electronic Classification
- Reduces risk due to audit, regulatory compliance and litigation.
- Ensures integrity of business-critical knowledge.
- Ensures accountability through audit trails.
- Increases the value and reusability of information by adding descriptive metadata.
- Reduces access time for retrieving physical records.
• Over the course of the last 10 years IDMS invoked a culture change that has allowed Electronic Record capture to become the new the “new norm”

• FY 2011 was the first year when electronic records nearly caught paper retirement

• Transformation Cycle
  • Design ➔ Deploy ➔ Monitor ➔ Evaluate ➔ Evolve
User Interface

Introducing SAM

Enterprise Workspace:

Enterprse

Search IDMS for:<br>From Here:<br>Advanced Search

Go

Introducing SAM

SAM FAQ

Simple Search

I Can’t Find It

IDMS Search Templates

- Benefit Search Template.htm
- Correspondence Search.htm
- DOE Search.htm
- HR Search.htm
- Photographs Search.htm
- Radiological Survey Reports Search.htm
- Work Orders or Work Packages Search.htm
- WRPS CHAMPS Work Orders Search.htm

Managed Information

- Electronic Records
- Hanford Contractor Documents
- References to Hardcopy Records

Site Cleanup / Science & Technology

- Advanced Med
- Bechtel Hanford
- Fluor Federal Services
- Lockheed Martin
- Mission Support Contract
- Plateau Remediation
- Richland Operations Office

Waste Tank Cleanup

- ATL International, Inc.
- Office of River Protection
- Tank Operations

Non Record/Collaboration

Non Record/Collaboration

IDMS Search Templates

Copy

Move

Delete

Zip & Download

Zip & E-mail

Print

Collect

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Size</th>
<th>Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 Source</td>
<td>06/13/2011 04:11 PM</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8 Items</td>
<td>07/07/2009 09:55 AM</td>
<td></td>
</tr>
<tr>
<td></td>
<td>88 Items</td>
<td>03/13/2012 12:28 PM</td>
<td></td>
</tr>
</tbody>
</table>
IDMS Statistics

- ~6,000 Users
- ~16 million total documents
- ~3.5 million Electronic Records

Monthly Metrics
- ~ 48,000 - 60,000 searches
- ~ 300,000 Pages added
- ~ 900 Phone calls fielded
- ~ 800 Emails fielded
Electronic Record Evolution

**Manual**
- Records manually loaded
- Records manually indexed

**Workflow**
- Records automatically routed
- Records manually indexed

**Automated (system to system)**
- Records automatically loaded
- Records automatically indexed
Questions?

U.S. Department of Energy - Richland
Site Stewardship Division

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