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Implementing and EDRMS – Information for Senior Management

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WHAT IS AN ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM?

An electronic document and records management system (EDRMS) is a software application that manages digital information such as email, word-processed documents, spreadsheets, images and scanned documents. An EDRMS can also control paper records and physical objects.

An EDRMS enables desktop access to information across an organisation and provides the security, access, version control and audit functionality required for better practice information management. An EDRMS can also deliver automated business processes, such as workflows and approvals.

WHY CONSIDER IMPLEMENTING AN EDRMS?

Rapid growth in digital information requires smarter information management. Australian Government agencies are using EDRMS to:

- move from paper to digital records management
- manage email more effectively as corporate records
- reduce or eliminate use of shared and network drives
- provide robust back-end records management functionality to support collaborative work systems.

WHAT ARE THE BENEFITS OF AN EDRMS?

1 Increase business efficiency through:

- simultaneous desktop access to digital information by multiple users at different locations
- possible integration with other business systems (for example, case management, finance and HR systems) and collaborative workspaces
- more accurate and faster retrieval of information
- improved information sharing across work group and system boundaries
- streamlined work practices and business processes
- reduced duplication
- more consistent naming or titling of records, allowing easier access
- reduced physical storage costs by digitising and capturing paper records, which can then be destroyed subject to appropriate authorisation.

2 Reduce business risk and improve governance through:

- enhanced ability to locate and retrieve information
- improved capture of email
- guaranteed authenticity and integrity of corporate information by 'locking down' the final authoritative version of a record
- greater security and access control over sensitive information
- reduced risk of loss or inappropriate destruction of important corporate information
- comprehensive audit trails.

3 Assists compliance with key standards and requirements including:

- *Freedom of Information Act 1982*
- *Archives Act 1983*
- *Australian Information Commissioner Act*
- *Evidence Act 1995*
- Federal Court discovery requirements.

WHAT ARE THE KEY CONSIDERATIONS WHEN IMPLEMENTING AN EDRMS?

- Full support from senior management is essential to the success of an EDRMS implementation.
- As with other systems, an EDRMS requires an ongoing commitment of time, money and personnel for implementation, operation and maintenance.
- An EDRMS implementation is a major change management exercise – it is going to affect the agency's culture in the way all staff manage, access, and use information.
- On its own, an EDRMS will not solve all your information management issues. To ensure a better outcome, invest in fixing other records and information management challenges that includes an active training program.
- End users will have to take greater responsibility for managing records and information once an EDRMS is up and running – it is important that they are throughout the project.

WHAT ELSE SHOULD YOU KNOW ABOUT AN EDRMS?

- Before committing to integration with other lines of business systems, weigh up the advantages and disadvantages.
- Migration of information from existing systems to an EDRMS must be based on business needs and risk assessment.
- To embrace the shift from paper to digital information management, an EDRMS should be used to capture digitised future paper records.
- You must plan for long-term retention of digital records.