Implementing an EDMS
Lessons Learned

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What is an EDMS?

What is an EDMS?

Software, hardware, digital and physical infrastructure necessary to store, organize, and retrieve the data.

Implementing an EDMS **Lessons Learned**

Caution Hard Lesson Ahead!

✓Workflow Analysis

✓Finding an EDMS Unicorn

✓Ensuring Organizational Commitment and Overcoming Resistance

✓EDMS Software Selection

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Considerations Evaluating for Your EDMS Data is an Asset!

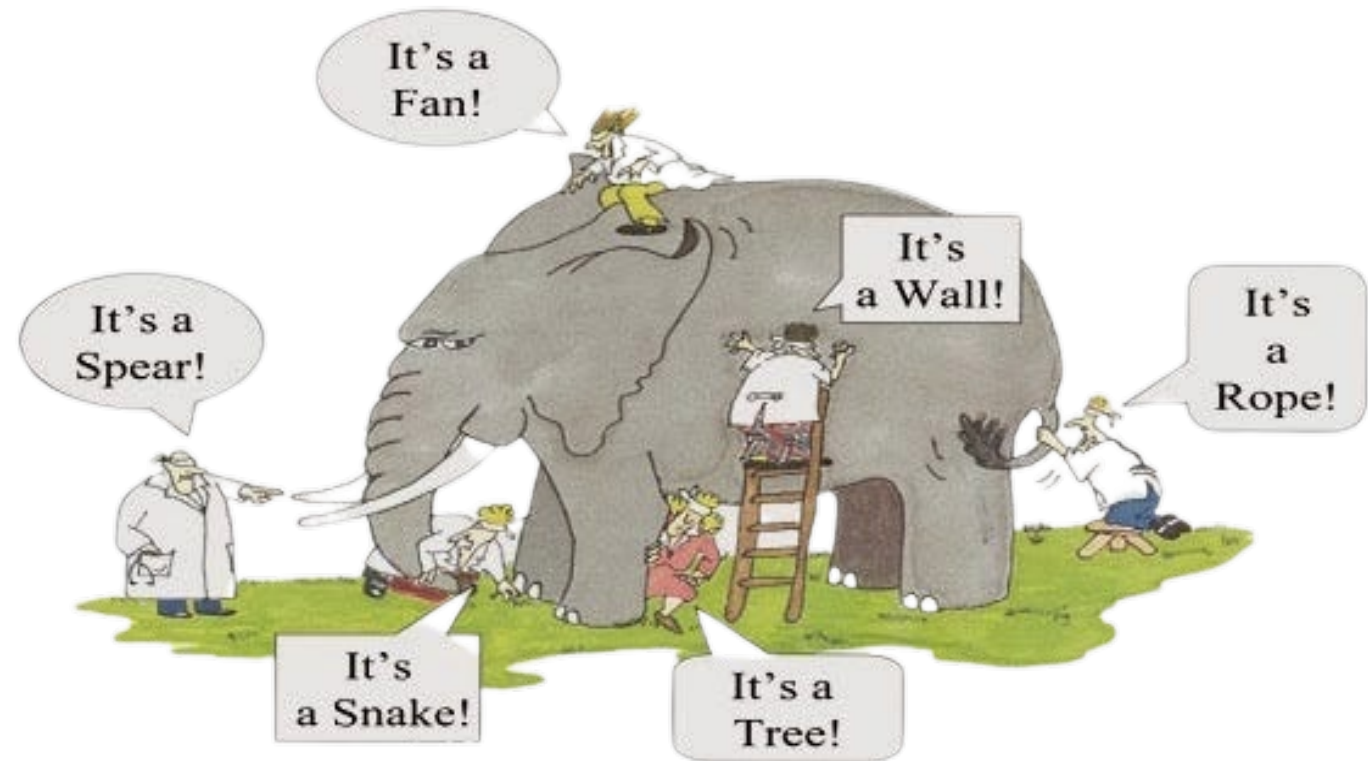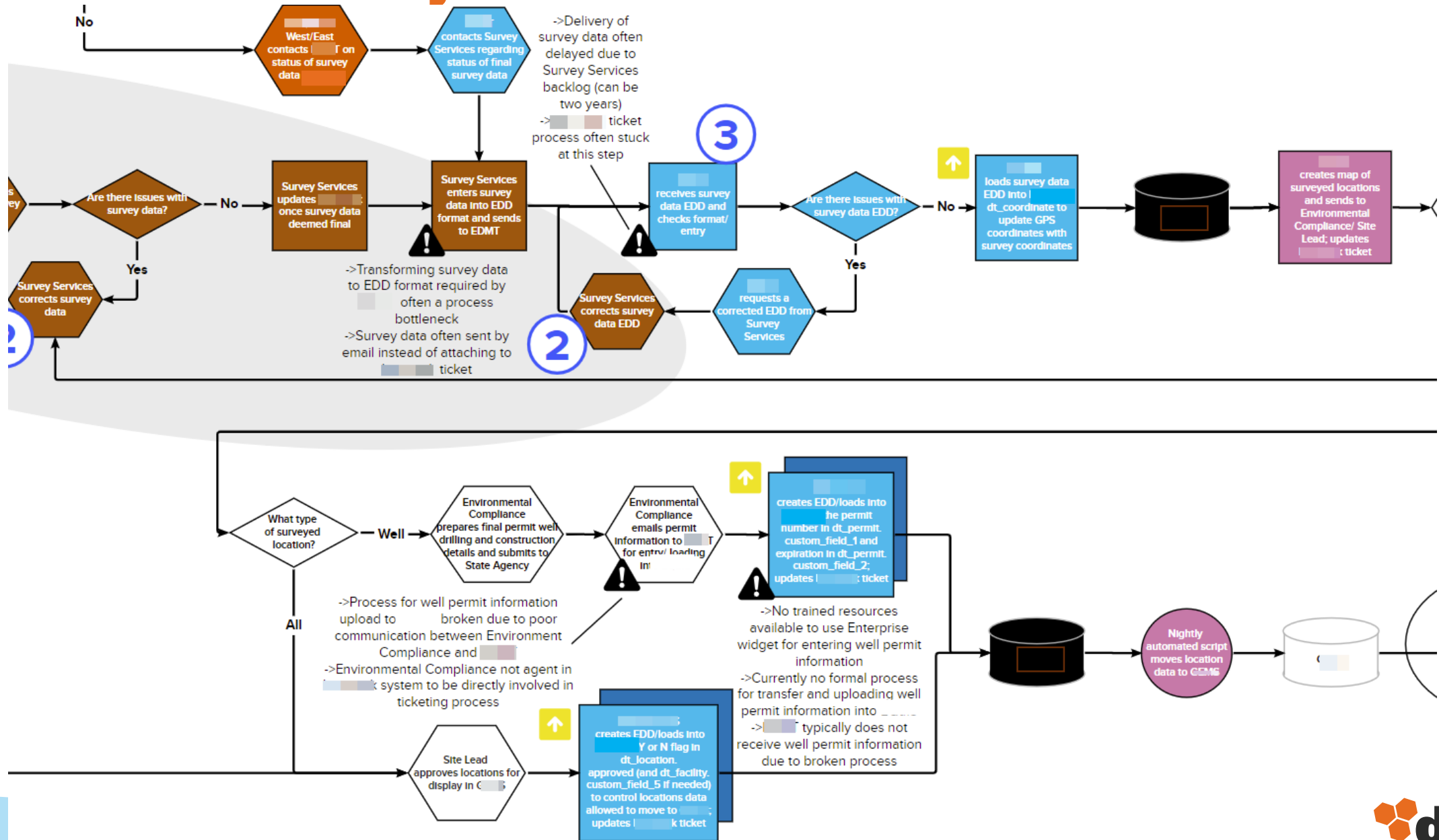| Project and Organization	Stakeholder and Users	Data Needs
• Organization needs • Project Lifecycle • Security and Access Protocols	• Identify Key Stakeholders • Understand data consumption needs • Identify Subject Matter skill sets	• Identify the types of data to be stored • Identify the use of each data type • Understand data formats (tables, reports, GIS, imagery) • Define data accuracy needed for the organization • Identify data ownership and access

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Workflow Analysis
Data is an Asset

Identifying methods of
- Data Collection
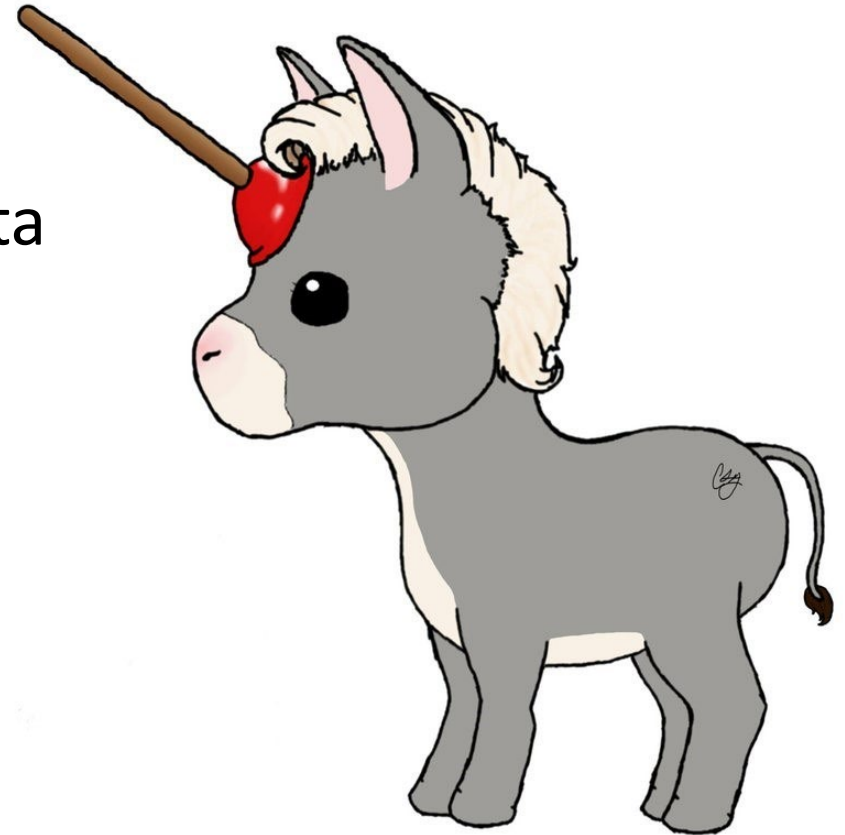- Data Processing
- QA/QC Procedures
- Visualizations and Reporting

Workflow Analysis

No

West/East contacts ████ T on status of survey data

contacts Survey Services regarding status of final survey data

->Delivery of survey data often delayed due to Survey Services backlog (can be two years)
->████ ticket process often stuck at this step

③

Are there issues with survey data?

No

Survey Services updates ████ once survey data deemed final

Survey Services enters survey data into EDD format and sends to EDMT

receives survey data EDD and checks format/ entry

Are there issues with survey data EDD?

No

loads survey data EDD into ████ dt_coordinate to update GPS coordinates with survey coordinates

creates map of surveyed locations and sends to Environmental Compliance/ Site Lead; updates ████ ticket

Yes

Survey Services corrects survey data

->Transforming survey data to EDD format required by ████ often a process bottleneck
->Survey data often sent by email instead of attaching to ████ ticket

Survey Services corrects survey data EDD

requests a corrected EDD from Survey Services

②

What type of surveyed location?

Well

Environmental Compliance prepares final permit well drilling and construction details and submits to State Agency

Environmental Compliance emails permit information to ████ T for entry/ loading int

creates EDD/loads into ████ he permit number in dt_permit. custom_field_1 and expiration in dt_permit. custom_field_2; updates ████ ticket

->Process for well permit information upload to ████ broken due to poor communication between Environment Compliance and ████
->Environmental Compliance not agent in ████ k system to be directly involved in ticketing process

->No trained resources available to use Enterprise widget for entering well permit information
->Currently no formal process for transfer and uploading well permit information into ████
->████ typically does not receive well permit information due to broken process

All

Site Lead approves locations for display in ████ b

████ creates EDD/loads into ████ Y or N flag in dt_location. approved (and dt_facility. custom_field_5 if needed) to control locations data allowed to move to ████ updates ████ k ticket

Nightly automated script moves location data to ████

Finding an EDMS Unicorn

That can
- Bridge the gap between technology, data collection, analysis, reporting and visualization.
- See the whole picture both in the past, present and future.

Organizational Commitment and Overcoming Resistance

- Invest the time for effective planning and implementation
- Ensure leadership support
- Collaborator buy-in and full participation
- Identify current process failures and seek opportunities for improvement

How about we start again and all pull in the same direction?

Change is >Not Easy

Old forms

TIME	Amount Purged Gal	Temp °C
15:32 15:33	0.81	7.07
15:36	0.90	7.15
15:39	1.08 0.99	7.13
15:42	1.08	7.17

WELL DEPTH 26.22 Feet   tubing: 25'
DEPTH TO WATER 15.97 Feet
COLUMN DEPTH 16.25 Feet   +
CASING DIAMETER 2" Inch
PUMP SET AT 20 19 20 Feet   dd: 0.03
TOTAL PURGE VOLUME 1.14 Gallons
SCREEN INTERVAL 9~24 Feet

New forms

- Gauging and Transducer equipment subform
- Groundwater sampling
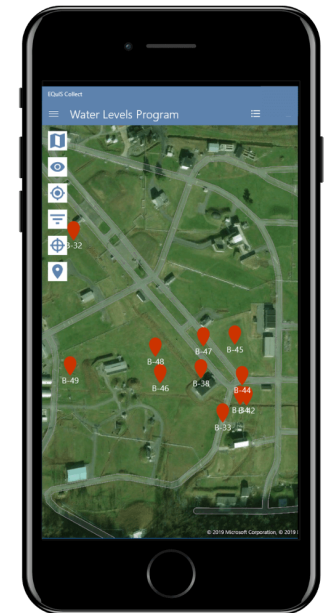- Site inspection
- Safety meeting and Job Hazard Analysis

👉 Well and Purging Information (26)

👉 Chain of Custody (0)

🛑 Reference Values (1)

Purge Volume Confirmation for 3 Vol (proposed minus actual)

5.379

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EDMS Software Selection

Custom Built

Specialized EDMS

How can ddms help?

- ✓ Functional Requirements Gathering

- ✓ Data Workflow Design

- ✓ Technology Selection

- ✓ EDMS Implementation and Support

Come See us at the ddms booth!

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Let's Connect on LinkedIn!