

# I Wish I Had Done This Differently

Suresh Joshee, University of Alberta

The background features a cluster of hexagons in light blue, light green, and light yellow. A thick green line starts on the left, forms a partial hexagon, and then continues as a horizontal line that passes behind the word 'Introduction'.

# Introduction

# University of Alberta at a Glance

- Top 5 Canadian University
- 39,500 students and 15,000 faculty and staffs  
18 Faculties and 370 programs
- Annual budget of €1.26 billion (US \$1.34 billion)
- Attracts over €335 million (US \$ 357 million)  
sponsored research
- 230,000 Alumni worldwide



# What is EDRMS?

- Electronic Document and Records Management System.
- Campus wide content management

## What does it do?

- Reduce the cost of paper processing
- Faster response times
- Better adherence to audit and regulatory standards
- Streamline business processes



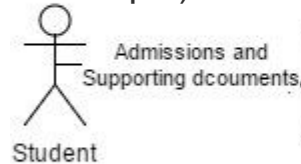
Credit: Max Pixel

# What happened?

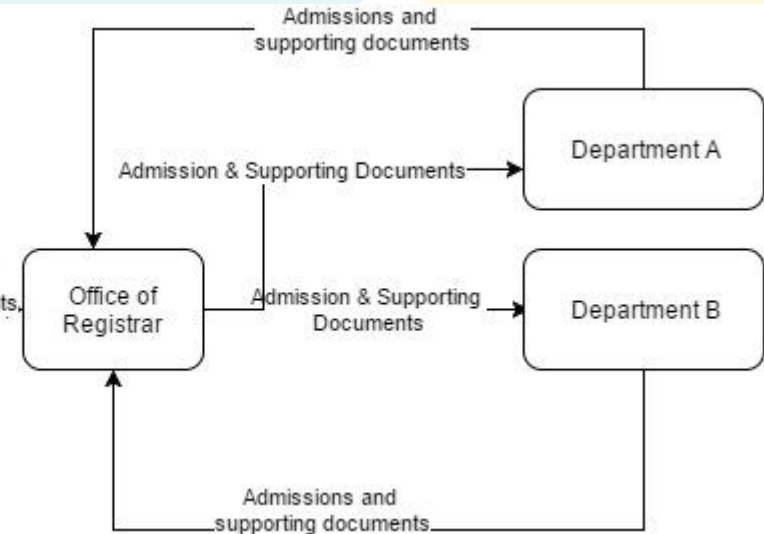
- Initiative started in 2008
- Several failed attempts due to tools, people and process
- Department specific deployment, often in silos

# What did we learn?

- Secure resources first (Funding, Technical, and People)
- Campus wide ECM implementation strategy



Credit: wikipedia.org



# Where are we now?

- First Canadian University to implement Alfresco in campus wide ECM
- Currently 3 record streams in Alfresco
- 700,000 documents in the repository
- Alfresco 5.0.3, Ephesoft 4.0
- Growth of 20,000 documents monthly
- Searches performed 55,000 times per month



Credit: Max Pixel



# Where are we heading?

- Campus wide ECM implementation
- Prioritize ECM implementation based on:
  - Return on Investment
  - Process Improvement
  - Compliance
- Alfresco 5.1 upgrade and Alfresco Record Management implementation



Credit: Brian Robert Marshall

The background features a honeycomb pattern of hexagons in light blue, light green, and light yellow. A thick green line starts on the left, forms a partial hexagon, and then continues as a horizontal line that passes behind the word 'Technical'.

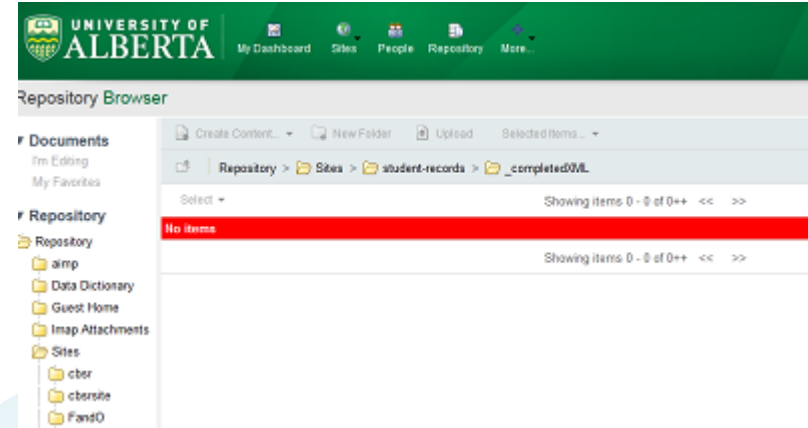
Technical



# 1: Update Alfresco Regularly

## Issues

- Alfresco Share bug in version 4.1.4
- Average search response time was 35 seconds
- Unstable system
  - Thousands of errors and timeouts
  - User frustration
  - Decreased confidence in the software
- On the verge of collapse of whole EDRMS initiative



## 2: Be on Alfresco Supported Platform

### Issues

- Non-supported platform – Limited help from Alfresco available
- Online community unresponsive, unable to help
- Supported platform can change between even minor versions.



Credit: Pixabay

### 3: Focus on Objective, Not on the Tools

- Current tools and technologies might not be the answer
- Match the tools and technologies to the requirements
- Create a business case for the tool that does the best job



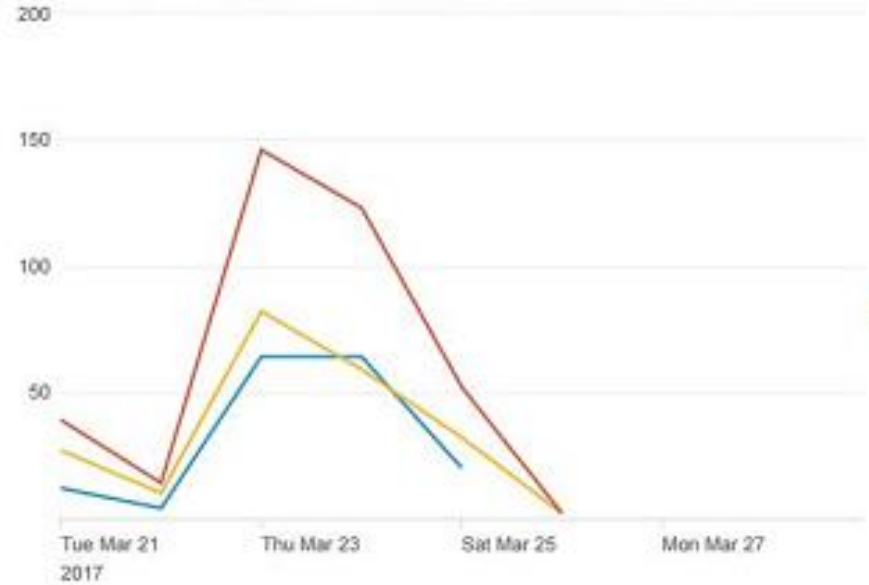
Credit: Pixabay

## 4: Log, Log and Log

- It will be very hard to find out what is happening on the system without proper logging
- Log every entry and exit point of the documents through out the document lifecycle
- Use log analysis tool such as Splunk or ELK.
- Do not overflow the log, allocate enough space for the log partition
- You will be surprised later how these logs will be used to solve various reporting issues

### EDRMS - Etranscript Processed Clone(Alfresco 5.0)

This reports show the number of Etranscripts processed in the last 7 days

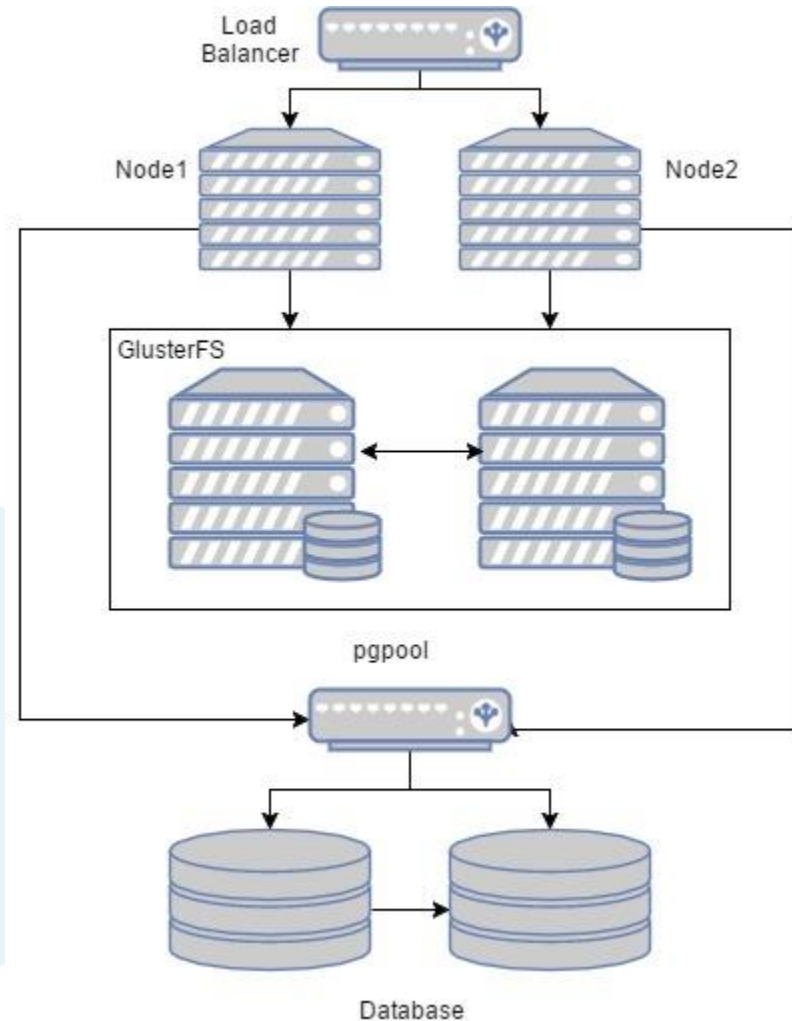


## 4: Log, Log and Log

```
---- Document Name -- 20170411109-PA_xxxx_2017-04-10_110302_37.pdf
--- New name -- 1111111 Withdrawal(1).pdf
--- File Moved to -- Bell, Tinker 1111111
-----
---- Document Name -- 20170411109-1TSAT_xxxxx_2017-04-10_120647_13.pdf
--- New name -- 3333333 Official Transcript SAT 2017-03-07(1).pdf
--- File Moved to -- Doe, John 3333333
-----
---- Document Name -- 20170411109-A_xxxxxx_2017-04-10_111036_13.pdf
--- New name -- 4444444 Admission Application 007229067 2017-04-07(1).pdf
--- File Moved to -- Chan, Jackie 4444444
-----
---- Document Name -- 201704111010-PA_xxxxx_2017-04-10_110302_38.pdf
--- New name -- 5555555 Withdrawal(2).pdf
--- File Moved to -- Joshee, Suresh 5555555
-----
---- Document Name -- 201704111012-PA_xxxxx_2017-04-10_110302_39.pdf
--- New name -- 6666666 Withdrawal(3).pdf
--- File Moved to -- John, Doe 666666
```

## 5: Simplify Architecture

- Reduce the number of variables that might impact your Alfresco implementation
- Do cost benefit analysis before introducing the new tools
- Take time to understand and work with various Alfresco components and subsystems Hazelcast, ImageMagick, Ghostscript, LDAP, various Caches.
- Use monitoring tool such as jVisualVM which provides the holistic picture of the Alfresco and JAVA threads





## 6: Other Technical Aspects to Consider

- Folder structure and document naming convention – still working on these issues ✓
- How other systems or users will be connecting to Alfresco – Make sure that connections are stable and reliable
- Always follow your model name with the organisation name to avoid namespace collision.

The screenshot displays the Alfresco document library interface. The breadcrumb navigation at the top shows the path: Documents > Admissions > S > Suresh Joshee, 1111111. Below the navigation, three document entries are listed, each with a thumbnail icon of a PDF form. The first document is titled '1111111 Admission Application 03455(1).pdf', the second is '1111111 Admission Application 03455(2).pdf', and the third is '1111111 Admission Application 03455(3).pdf'. Each document entry includes the text 'Modified just now by Suresh Joshee' and '2 MB'. Below the title and metadata, there are icons for 'Favorite', 'Like' (with a count of 0), 'Comment', and 'Share'. The document titles are highlighted with red boxes in the original image.

Documents > Admissions > S > Suresh Joshee, 1111111

1111111 Admission Application 03455(1).pdf  
Modified just now by Suresh Joshee 2 MB  
(None)  
No Tags  
★ Favorite | 👍 Like 0 | 💬 Comment | ➦ Share

1111111 Admission Application 03455(2).pdf  
Modified just now by Suresh Joshee 2 MB  
(None)  
No Tags  
★ Favorite | 👍 Like 0 | 💬 Comment | ➦ Share

1111111 Admission Application 03455(3).pdf  
Modified just now by Suresh Joshee 2 MB  
(None)  
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★ Favorite | 👍 Like 0 | 💬 Comment | ➦ Share

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Process

# 7: Knowledge Sharing

- Build & develop in-house expertise
- Always build AMP and deploy internally - you will be surprised how many dependencies are there
- Housed the software code inside your organization
- Consider Intellectual property (IP) right of the software code – who owns the code and how the updates to the code will be made after the contract expires



Credit: Pixabay

## 8: Change Management Process

- Focus on people aspect of the change not only system change
- Provide ample training with heavy focus on people
- Communicate the message behind why this change is necessary
- Involve users in testing



## 9: Other Aspects to Consider

- Establish the funding model or how it will be funded
- Establish the proper governance structure - Steering for direction / strategy and Change Advisory Board (CAB) for managing the day to day operations
- Build small but think bigger; build in phases rather than all once - you will never get right in the first time, always need to incorporate user feedback



Credit: Pixabay



Questions?  
Suresh Joshee  
University of Alberta

[sjoshee@ualberta.ca](mailto:sjoshee@ualberta.ca)