Context

The customer was relying on two content management systems (DMS and CMS) that were built on outdated and unsupported technologies, both at the operating system and software levels. This posed significant risks to critical business processes. To mitigate these risks, the project was initiated to consolidate and replace the two systems with a unified, modern content management platform.

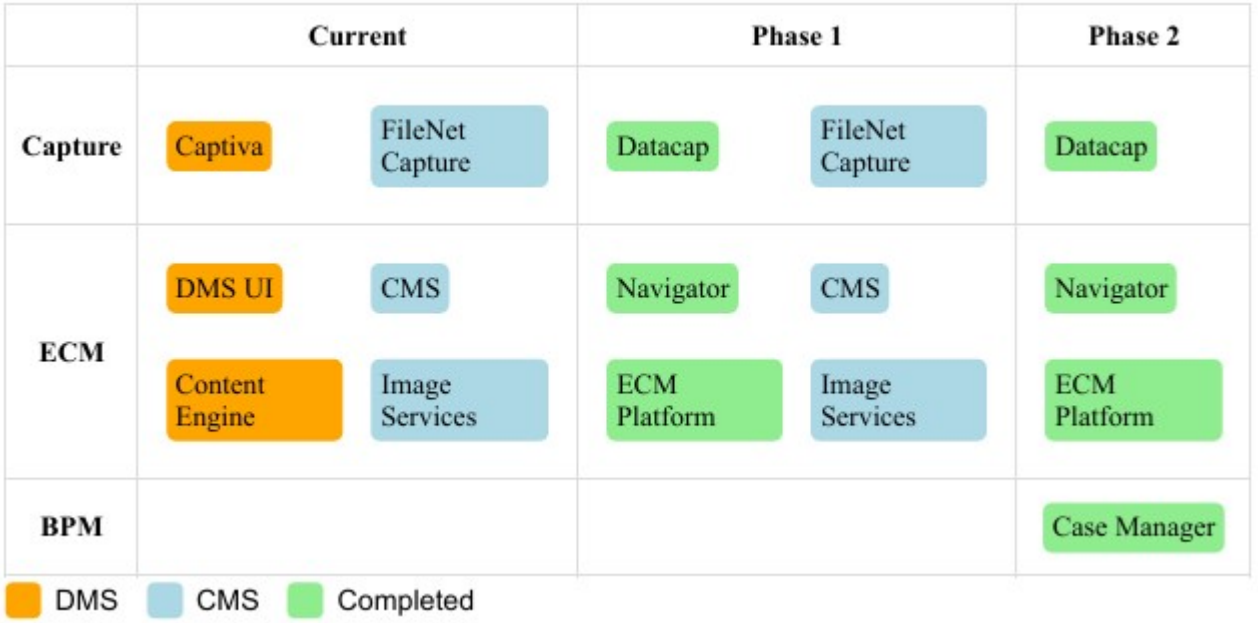
Initiating the Transition

- Requirements analysis (Understand current systems)
- Define goals
- Assemble team
- Create project plan

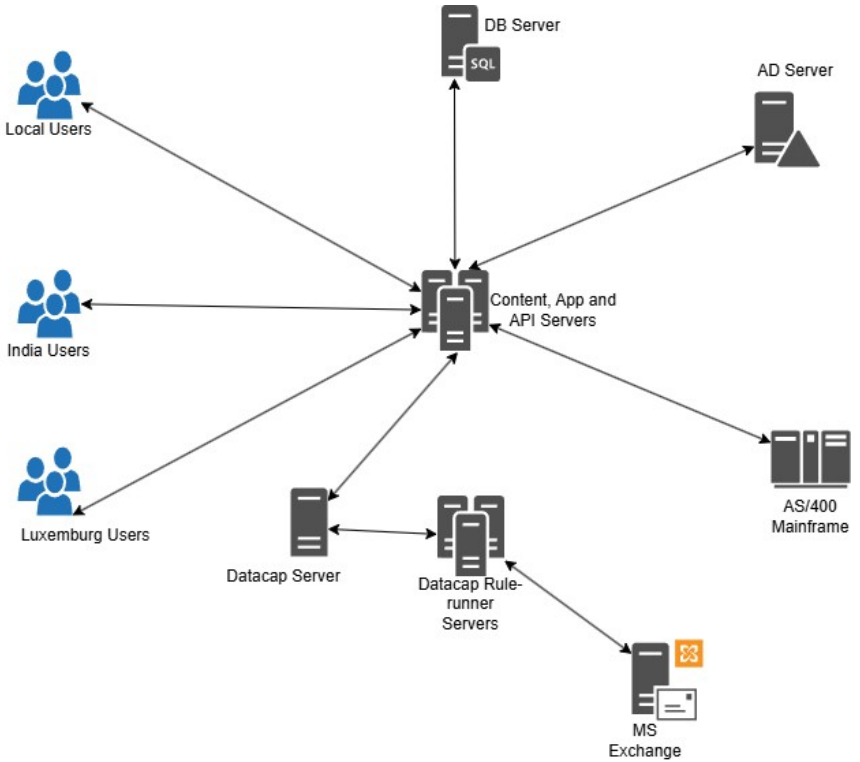
Main Areas of Work

- Document & data migration (SL)
- Document capture (TP)
- User interface (DW, Stan)
- Web APIs and utilities (Stan)

Implementation Phases



Architecture



Phase 1

- Install and configure ECM platform, migrate DMS documents and data using built-in P8 Sweep. (SL)
- Replace Captiva capture software with Datacap (TP)
- Configure document security and implement search functionality (DW)
- Build the web services, create custom UI components and actions (Stan)

Phase 1- Stan's tasks

- Create Reference DB - SQL Server
- Create API that exposes Reference DB – .net
- Create API that returns indexing info from their host DB – .net
- Create External Data Service - Java
- Create UI components (audit viewer, bulk-indexing, document comments) for Navigator – JS and Java
- Create Web UI to manage Reference Data – .net

Phase 2

- Migrate CMS documents and data using content federation services (SL)
- Replace FileNet Capture capture software with Datacap (TP)
- Configure document security (DW)
- Modify web services and custom UI components, create Case Manger UI components (Stan).

Phase 2 - Stan’s tasks

- Make External Data Service more generic/configurable (Java)
- Deliver custom ICM components to manage letters, emails and case notes (JS and Java)
- Build command line utility to help export/imprt lookup lists from UAT -> PRE-PROD -> PROD (c#)