

Case Study



In this case study we discuss how Seed Information Management Consultants provided a company-wide Content Management Solution to Winder Controls, a leading international supplier of mining equipment.

The Challenge



Winder recently won a number of large contracts to deliver engineering projects to the mining sector. One of these contracts was for a mining group that had also implemented Alfresco and advised Winder to engage a partner with extensive skills and experience in Alfresco ECM.

Winder required the Content Management solution to provide document management and compliance for their project content. This included both controlled document management, collaboration and correspondence management. The solution also had to be scalable to multiple concurrently running projects without adding ongoing costs per project. Importantly, the solution had to increase the productivity of the overall engineering process by managing documents over the full lifetime of the project.

The Solution



Controlled Document Management

A Site was created for each of the Winder Controls projects. Engineering documents are managed in a very controlled manner which must support a prescribed document numbering schema. For Winder controls this was based on Client, Project Number, Sub Project Number, Component, Document Type and sequential number. The solution provided metadata structures at both folder and document level. This allowed documents to be categorised into a 3 tiered file plan that enabled metadata inheritance through rules and behaviours. The solution also made use of Alfresco faceted metadata search, security and the collaborative features that come with an Alfresco site. For example a wiki was added to each site as a project FAQ, and data-lists were used for contract and location information.

Email Correspondence

The Alfresco Outlook Integration was used to provide an interface for users to store and manage emails through Alfresco. Winder also required an archive of all emails sent and received from customers. This was provided by enabling the Incoming Email service and allocating an email address specific to each project site.

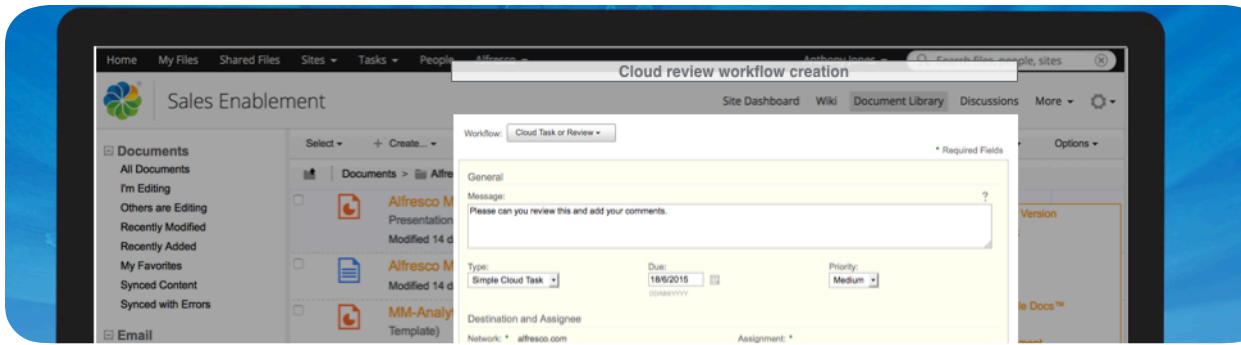
All emails that were sent to customers also cc'd the project email address and therefore ended up being stored in Alfresco. Winder customers agreed to cc the project email address which meant that all incoming emails were also trapped. In this way the Alfresco solution showed its ability to manage a record of all email correspondence between customers.

Client Release Documents & Version Control

Winder required the ability to release a specific version of a document in pdf format to a customer while in parallel allowing for new versions to be created. This is sometimes referred to as a controlled release. The controlled release was maintained independently of the working copy and was published in a format that is not changeable (eg pdf). The working copy can then be changed as much as required between the next controlled release.

The Winder metadata includes a field called documentVersion which is used to hold the release version number. This can be any sequence such as 0,1,2.. or a,b,c etc. The value and sequence type of the document Version is managed by the user managing the document and is set manually. Alfresco also maintains document versions. This allow for users to update documents and store them as alfresco versions, independently of the winder document versioning schema.

The Results



Winder Controls now have a **Content Management Solution** in place that allows them to manage their content in a controlled manner. All correspondence between their customers for projects is now being archived and available for fast Discovery in case of dispute. The publishing of documents tied to Winder specific version labels has ensured a controlled release mechanism. Furthermore, the project allowed Winder to develop and improve on their process for managing and collaborating both with Winder colleagues and also external customers.

What To Do Next

Seed offers our potential clients a no obligation 30 minute phone consultation, which will provide powerful insights into how an ECM solution can benefit your organisation. Conducted by the Director of Seed, information management veteran Brian O'Neill, the call will allow you to ask any questions you have about your current or future ecm systems.

To schedule a call please go to
www.seedim.com.au/ecm-consultation/



Seed Information Management
The Dream Factory, Footscray
Tel 03 90210837
Email hello@seedim.com.au