Chapter 6

Project Life-Cycle Planning and Methodologies

OVERVIEW

This chapter deals with the planning aspects of an IDCM project, including scope, feasibility, and life-cycle development. It reviews the typical project deliverables that may be used during planning and subsequent phases.

The objectives are to consider and discuss:

- The importance of planning to the successful implementation of an IDCM solution, and the need to distinguish between product development and project life-cycles;
- A product development life-cycle that enterprises can use for an IDCM project;
- The steps involved in initiating and defining an IDCM project;
- An approach to aligning the development of a management framework with requirements for enabling an IDCM solution, including a review of key life-cycle stages;
- Development of a project organization structure that may be applicable for an enterprise IDCM project;
- Identification of a set of risks to form the basis of a Risk Management Plan; and
- Methodologies suitable for an IDCM project.

THE IMPORTANCE OF PLANNING

The most important key to the successful implementation of an IDCM solution is planning. If proper planning techniques are not applied during the conduct of an IDCM project, the project may fail or major difficulties may be encountered with the implemen-
tation of the system. These undesirable outcomes may have a major detrimental impact on the operations of the businesses or government enterprises involved, and typically involve extensive delays or significant levels of additional costs. Furthermore, major project failures may entail a large social and economic cost, and where project failures or major setbacks are experienced in government, they entail a direct cost to government and taxpayers.

Enterprises often manage the risks associated with complex document management projects by contracting out the work to professional services organizations. Consequently, much of the planning work associated with large IDCM projects has been accomplished or facilitated by consulting or systems integration companies. The specific methodologies used by these companies for the planning, specification, development, and implementation of an IDCM solution often remain their intellectual property, and do not appear in the public domain.

However, the project life-cycle planning techniques, methodologies, and tools required for planning and implementing IDCM systems are similar to the methods that might be applied to the package selection and implementation of any type of complex information system. DMS are distinctive in that, whereas most information systems involve the use of source documents for data creation, update, and search and retrieval, DMS capture and manage the source documents, as well.

Their complexity is brought home when one is reminded that documents are an intrinsic everyday part of business processes. The enterprise requirements typically involve integration with heterogeneous and evolving desktop operating systems and applications used to generate documents, the multiplicity of formats to be managed, and the implications for managing large file sizes on computer networks, which often feature low bandwidth for file transfer and communications.

Because of circumstances like these, there is a high degree of risk in planning and implementing IDCM systems. The requirement to capture and manage digital source documents invariably has a marked impact on how end users interact with documents in their day-to-day business environments. End users will be required to register documents using more rigor than is generally evident in managing office documents and will need to learn new techniques for accessing and sharing information. Consequently, appropriate communication and change management strategies are key requirements throughout the project life-cycle.

Structured methods for the development and implementation of information systems evolved from the need to address the divergent methods that were once evident in the development and implementation of computing systems. (We provide an overview of these types of methodologies later in this chapter.) Methodologies offer a structured series of steps and tasks that the practitioner can consider when commencing an information systems project, and also a set of techniques and tools that enable the project team to document user and system requirements in a structured way.

While structured methodologies may provide the type of life-cycle framework for planning, specifying, selecting, and implementing complex information systems packages, it is important to discuss how these types of planning techniques might be applied to an IDCM project. This chapter provides insights into the life-cycle planning of an IDCM strategy, commencing with project initiation through to the implementation of the solution.
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