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Document management — Change management for successful electronic document management system (EDMS) implementation

Applications en gestion des documents — Changement de gestion associé aux technologies du système de gestion électronique des documents (SGED)

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Foreword

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ISO/TR 14105 was prepared by Technical Committee ISO/TC 171, *Document management applications*, Subcommittee SC 2, *Applications issues*.

This second edition cancels and replaces the first edition (ISO/TR 14105:2001), which has been technically revised.

Introduction

Electronic document management systems (EDMS) have unequivocally contributed to the ability of organizations to automate portions, and at times all aspects, of a business process. These technologies are successful when organizations consider that a significant amount of change will occur and that end-users, information technology, management, records managers, and archivists are all affected. Planning and/or implementing these technologies without recognizing the amount of change management typically results in systems being implemented that do not meet the organization's needs, requirements, or expectations. It is commonly recognized that without adequate planning and execution of change management, the introduction and implementation of these technologies can actually place extra burden on the end-users and organizations, at times contributing to project failures.

EDMS technologies are tools that assist the organization to improve processes where appropriate. It is critical that the organization has the ability to separate non-technology-based change from technology-based change. Planning change management, beginning with the initial project phases, results in the organization understanding what needs to change, why, and what the desired result is, without adversely impacting the end-users or the organization. Change always results in some impact; the key to change management when implementing EDMS technologies is to minimize the adverse impacts and ensure that the organization has ample time to implement the desired change in order to achieve the desired results after the technology is implemented.

This Technical Report systematically identifies and reviews the ergonomic and organizational issues and considerations associated with the selection, implementation, and work practice criteria for EDMS systems.