

This is a preview of "ISO/TR 14105:2011". [Click here to purchase the full version from the ANSI store.](#)

Second edition
2011-06-15

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)



Reference number
ISO/TR 14105:2011(E)

© ISO 2011

This is a preview of "ISO/TR 14105:2011". [Click here to purchase the full version from the ANSI store.](#)



COPYRIGHT PROTECTED DOCUMENT

© ISO 2011

All rights reserved. Unless otherwise specified, no part of this publication may be reproduced or utilized in any form or by any means, electronic or mechanical, including photocopying and microfilm, without permission in writing from either ISO at the address below or ISO's member body in the country of the requester.

ISO copyright office
Case postale 56 • CH-1211 Geneva 20
Tel. + 41 22 749 01 11
Fax + 41 22 749 09 47
E-mail copyright@iso.org
Web www.iso.org

Published in Switzerland

This is a preview of "ISO/TR 14105:2011". [Click here to purchase the full version from the ANSI store.](#)

Contents

Page

Foreword	iv
Introduction.....	v
1 Scope	1
2 Terms and definitions	1
3 Recommendations for EDMS implementation success	2
3.1 General	2
3.2 Participation and integration.....	3
3.3 Strategic planning: organizational change strategy.....	4
3.4 Organizational assessment	5
3.5 Change management program	7
3.6 Use of consultants	9
3.7 Time management	10
3.8 Backfile conversion.....	10
3.9 Project objectives and goals.....	10
4 Usability and ergonomic interfaces.....	11
4.1 General	11
4.2 End-user analysis and usability.....	11
4.3 Ergonomic criteria for selection of EDMS systems	11
4.4 Software usability check-list	13
5 Workplace ergonomics	15
6 Use of change management for EDMS success	15
Bibliography.....	16

Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

The main task of technical committees is to prepare International Standards. Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

In exceptional circumstances, when a technical committee has collected data of a different kind from that which is normally published as an International Standard ("state of the art", for example), it may decide by a simple majority vote of its participating members to publish a Technical Report. A Technical Report is entirely informative in nature and does not have to be reviewed until the data it provides are considered to be no longer valid or useful.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights.

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.

This is a preview of "ISO/TR 14105:2011". [Click here to purchase the full version from the ANSI store.](#)

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.