



AC⁺erm Project

Technology Facet: Delphi Study
Thematic Analyses



Arts & Humanities
Research Council

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The AC*erm Project – Accelerating positive change in electronic records management' – ran from 2007 to 2010 and aimed to investigate and critically explore issues and practical strategies to support accelerating the pace of positive change in managing electronic records.

It focused on designing an organisational-centred architecture from three perspectives: (i) people, including vision, awareness, culture, drivers and barriers; (ii) working practices including processes, procedures, policies and standards; and (iii) technology in terms of the design principles for delivering effective recordkeeping.

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CONTENTS

Introduction to Systems and Technology Facet Delphi Study	i
Round 1	
Introduction	1
List of Questions	2
Summary of Responses	4
Round 2	
Introduction	8
List of Questions	9
Analysis of Responses	10
Round 3	
Introduction	15
List of Questions / Issues	16
Summary of Responses	21
Round 4	
Introduction	31
Questions and Summary of Responses	
1. ERM Approaches	32
2. Trade-offs	48
3. Technical Aspects	57
4. Automation	64
5. eMail Strategy	65
6. eMail Techniques	71
7. Cloud Computing	72
8. Named Products / Solutions	80

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Technology Facet – Delphi Study – Overview of Entire Study

Background *General*

The third facet of the investigative phase of the project related to the systems and technology aspects of managing e-records. It considered issues in terms of the design principles for delivering effective recordkeeping, and included line-of-business and office systems used by organizations; mobile technologies supporting mobile working; web-based technologies; multiple forms of information; citizen-based online transactions; and personal use of computers and the Internet.

Participants in the Delphi study on the systems and technology aspects of ERM identified, explored and clarified the issues in three rounds of questions and a final exercise in which solutions arrived at in previous rounds were evaluated by a number of set criteria. The first three rounds were carried out by means of a series of questionnaires; the final round involved the completion of an online survey.

The participants' responses were analysed using a range of different approaches (subject themes, numerical ratings) to provide a broad view of the data.

A diagram of the structure of the various stages of the Delphi Study is given on page (ii) overleaf.

Nature of Output All rounds – lists of questions

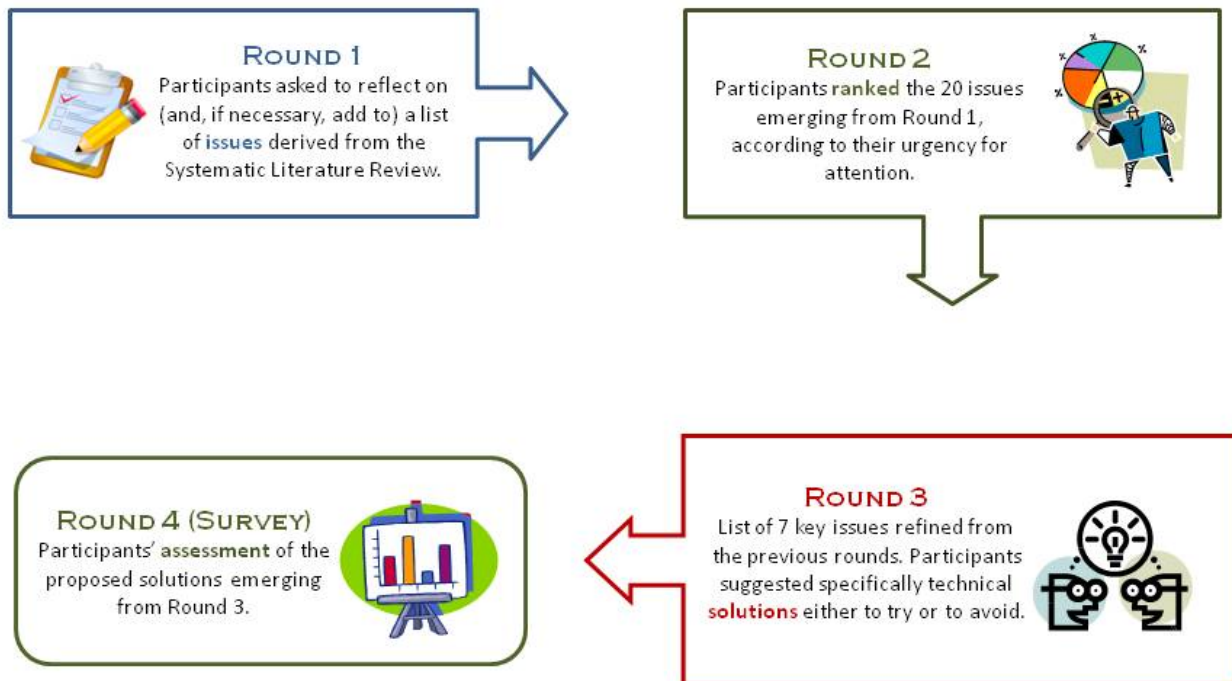
Round 1 – summary of participant responses (text).

Round 2 – ranking of issues in terms of urgency / importance (graphs and tables).

Round 3 – summary of solutions (text).

Round 4 – evaluation of solutions (text and tables – collated responses to the survey).

Structure of Systems and Technology Delphi Study



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Systems and Technology Facet – Delphi Study – Round 1 – Identifying the Issues for Discussion

Background In Round 1, the participants were provided with a list of 16 issues that had emerged from the Systematic Literature Review (SLR) and asked to reflect on these issues and on how they manifest themselves in practice. They were encouraged to respond from their own perspective and experiences, and to submit real-life examples that could add to the evidence base.

Participants were also asked to add any issues that they felt were missing, and to advise to which stakeholder group(s) they belonged, and what their disciplinary / professional area was.

Nature of Output Thematic analysis of issues (format: text).

This output consists of the original list of issues and a summary of the participants' responses.

The questionnaires were sent to participants in April 2009 and the summary compiled in May 2009.

Systems and technology Facet – Delphi Study – Round 1 – List of questions presented to participants

- 1 IT systems used in organisations
Line of business systems, office systems, mobile systems etc. which create and contain 'records'.
 - IT systems often lack RM functionality, are designed without RM in mind. Does this matter?
 - In the context of today's technology and systems, is the distinction between records, information and data helpful?
 - Do new techniques, such as computer forensics, make 'traditional' RM processes redundant?
- 2 Electronic records management systems (ERMS)
 - Are dedicated ERMS the best approach for RM, or should RM functionality be embedded in line of business, office and mobile systems?
 - Do ERMS integrate with other IT systems in an organisation? How well?
- 3 Email
 - Email started in the 1970s – but we are still failing to manage it. Email systems lack RM functionality. Does this matter?
- 4 e-Communications
e.g. messaging, instant messaging, twittering
 - The same problems of management / RM found with email are being repeated with newer communication systems. Does this matter?
- 5 Web 2.0 technologies
People are used to the flexibility, ease of use, communication and sharing of Web 2.0 technologies such as social network sites and blogs that they experience in their personal lives. They expect IT to be like that in the workplace. They have the skills to join/set up such applications for work purposes outside the organisation.
 - Staff frustration with IT systems within organisations is a driver for use of Web 2.0 technologies outside organisational control
 - Organisations' attempts to prevent staff from using such Web 2.0 technologies are futile
 - To what extent is this true?
- 6 Cloud computing
e.g. infrastructure as a service (IaaS), platform as a service (PaaS), software as a service (SaaS), Web 2.0 technologies etc.
 - Cloud computing technologies lack RM functionality, are developed without RM in mind. Does this matter?
 - How do we manage the business records generated from the use of cloud computing technologies?
 - Do we have to adapt RM to cloud computing technologies?
- 7 IT system design
Understanding of how people actually use IT systems should be used in the design of such systems. Key design criteria include: usability; understanding of actual work processes. Records professionals and end-users should be involved in IT systems design.
 - Under real conditions, how and when does this happen?
 - Why doesn't it happen?

8 IT systems not up to the task

- IT systems do not yet cope well with very complex work systems and settings, e.g. in the healthcare field.
- Why? To what extent is this true?

9 Interoperability of systems / technology

- Are there any preferred approaches/frameworks/tools?

10 RM design

RM should be embedded into IT systems and work processes so that the required record keeping metadata is captured automatically, and the recordkeeping burden of the end user is minimised. Methods include controlled document templates, automatic classification etc.

- Are such systems used in organisations? Where?
- Do they really work?

11 Implementation of IT systems

- Who / what has to change? There are three scenarios:
 - The system changes - IT systems designed / or fully customisable to match work processes, user behaviours and preferences
 - The users have to change - Organisations take the opportunity of a new IT system to change work processes, implemented through the system
 - Work processes and users have to change - Off the shelf systems or inflexible poorly designed systems can't be changed, or have minimal customisation
- Are there any other scenarios?

12 IT adoption / IT alignment / IT investment / IT value

- What measures / methods could be used to demonstrate the business value of IT systems?
- What measures / methods could be used to demonstrate the business value of RM systems?

13 Standards, frameworks, architectures, models for enterprise and IT systems

- RM is not covered/included in many of these.
- Why not? Should it be?

14 Long-term storage / preservation of e-records

Approaches include e.g. concentrating on important records, distributed custody. Methods include e.g. migration, emulation, conversion to open formats. Technologies include e.g. storage media.

- Are there any preferred approaches / methods / technologies?

15 Digital signatures

The legal standing of digital signatures has been established. Methods for generating digital signatures exist.

- Why are digital signatures not commonplace in the workplace, and in personal use of commercial and e-government transactions etc.?

16 Pace of technological change

- Legal practices lag behind technology.
- RM practices lag behind technology.
- What are the important gaps at the moment?
- Can we decrease the lag period?

17 Other issues

- Given the rapid pace of technological change, what other important issues are there?

Systems and Technology Facet Delphi Study – Round 1 – Summary of participant responses

1. IT systems used in organisations

Line-of-business systems, office systems, mobile systems etc. which create and contain 'records'.

Most participants gave qualified agreement to the statement that 'IT systems' lack of inclusion / consideration of RM requirements is a cause for concern'. People who agreed noted the negative impact on RM. Those who disagreed noted that such systems did contain some RM functionality. Reasons for qualified agreement included the fact that these systems have other purposes, and that the impact of lack of RM functionality will vary in different sectors.

Participants had varying views on the helpfulness of the distinction between records, information and data. Records need to be distinguished so RM procedures can be applied to them. But in practice the dynamic nature of systems means that the boundaries lack clarity and that distinctions are difficult to make – particularly true of Web 2.0 technologies. Different views between different professionals cause confusion, and managers and end-users tend not to make such distinctions. If records professionals are seen to only cover records not information, then the wider value of their expertise is not recognised.

Participants disagreed that new techniques such as computer forensics would make traditional RM processes obsolescent. They can't be used on a day-to-day basis, do not help with RM procedures such as classification, retention etc., and are insufficient for business requirements for record provenance. Where they could have a value is in the provision of audit trails and in testing the rigour of an organisation's RM procedures.

2. Electronic records management systems (ERMS)

There was qualified agreement with the statement that 'EDRMS is the best approach'. Reasons included: the need for seamless integration with other IT systems; the need for additional RM functionality in line of business systems; and people factors – the critical success factor (CSF) is the organisational culture, and it's the end result that matters, not the technology used to get there.

There was qualified agreement with the statement that 'EDRMS have good integration with other IT systems': in practice most EDRMS are standalone. The reasons for this included: interoperability at the information architecture (enterprise-level) is a vision not a reality; the failure in the past of EDRMS with pretensions to taking over the entire organisational IT environment; some EDRMS from small vendors cannot keep up with technological changes; some EDRMS try to replicate paper processes; the high cost of integration because of the complexity; success in integration depends on the context – the specific technologies, the objectives, the expectations and who implements it. Requirements for integration include: cultural mindset; inclusion of EDRMS in the IM&T strategy; incorporation of all business processes; prevention of staff workarounds. A case example of the successful integration of the Hummingbird system was noted.

Some participants agreed that RM functionality needed to be embedded in other IT systems (line of business, office, mobile etc.), others gave qualified agreement. Reasons for agreement included: it creates a better cultural change and RM buy-in; RM systems are being taken over by the major IT vendors making such embedding more possible. Reasons for qualified agreement included: you still need an EDRMS in addition; there is no generic, 'one-size-fits-all' solution; CSFs include organisational culture, good management; it's the end-product that matters, not the technology used to achieve it; RM is about people not technology. There were some differing views about the use of SharePoint for RM.

3. eMail

Most participants agreed that the lack of RM functionality in email systems was a cause for concern. This caused a wide range of problems and risks for organisations with respect to important records / information. However, participants were split on how to address this. Some felt that RM functionality should be embedded in the email system itself. Others felt that integration with ERMS / EDRMS or transferring important information / records to such systems was the approach to use. Lone voices felt that: (i) we should not concern ourselves as that was not the purpose of email; and (ii) email systems were improving in their functionality.

4. e-Communications

Most participants agreed that the lack of RM functionality in new e-communication systems was a cause for concern; though it was not such a problem as with email because currently the level of use of such systems in the workplace is low. However RM issues need to be addressed to future-proof such systems when they become mainstream. Approaches suggested include: embedding RM functionality; policies; awareness-raising; and prohibition.

5. Web 2.0 technologies

Some participants have experienced use of these technologies for work purposes inside / outside organisations. Others have not, or see it involving some staff only (younger ones?), with other staff being resistant to using such technologies. Some participants feel that prohibiting such technologies is not the approach to take: they do provide benefits. Others feel that they should be prohibited, or allowed only for agreed, restricted purposes. These new technologies change work practices and user attitudes as well as impacting on RM. Therefore, before this becomes a big problem (and it could create an even bigger problem than email in the future), organisations should take a strategic approach, looking at impact, benefits and risks, and creating policies and guidance.

6. Cloud computing

Lack of RM functionality is a concern. Use of such systems creates a range of business risks. RM needs to be addressed: principles may be the same, but the approach of the RM corporate function may need to change.

7. IT systems design

Though it was felt that IT systems design should involve understanding of user behaviour, and input from records professionals and end-users, most participants thought this rarely happened in practice. There were only a few participant experiences where this had happened. Reasons why it didn't happen included: IT professionals' attitudes and approaches to technology (they usually led projects, and were too focussed on the technology side); effort spent on the 'what' of requirements not the 'how'; managers' lack of understanding of the value of records professionals' expertise; and organisations' lacking the time and resources to involve users and other stakeholders. However, it was noted that sometimes end-users didn't find the time to be involved, and that some records professionals' approach to RM was too inflexible. To achieve involvement requires relationship-building and a co-operative, pragmatic approach. However the problem for RM systems is that they have to 'integrate' across all the other systems in an organisation

8. IT systems not up to the task

Most of the reasons given to explain why IT systems did not cope well with complex situations related to people and processes. They included: involvement of politicians; unrealistic expectations; perception of IT as a panacea; too much focus on the technology; using the IT department to lead projects; lack of co-ordination; lack of needs analysis and user involvement; lack of the required resources (staff and equipment). There were a few cases given where such systems did work. It was suggested that compromise and a pragmatic approach were needed and an acceptance that the aim was a system that was 'good enough', even if not perfect. Where IT systems are inadequate, users create silos and use workarounds.

9. Interoperability of systems / technology

Preferred approaches given were: evolution not revolution; KISS (keep it simple, stupid); under-perform – over-deliver; project management techniques; middleware; whatever works in the specific context. Interoperability standards exist, but they have limited use and impact.

10. RM design

Developing and using automatic RM processes in IT systems. Some participants disagreed, as they thought that human input was necessary. Some gave a qualified agreement, as it would require getting users to, for example, understand and use templates. Some agreed, and gave examples where this was happening in practice. The reasons that would make such techniques difficult to achieve in practice include: increased system costs; lack of enforcement of users by organisations; the suspicions of records professionals.

11. Implementation of IT systems

Design and implementation of IT systems requires all 'elements' to change in some way, depending on the specific context – it is a compromise. Elements include: systems developers; vendors;

managers; users. The approach is to collaborate with vendors, understand business and user requirements, customise systems, and involve users – early on. In this way the system will be more efficient and require less costly ‘tweaks’ after implementation. Users will also not be frustrated and will trust the system and make the necessary behavioural changes. However, people must have realistic expectations of what IT can actually do.

12. IT adoption / IT alignment / IT investment / IT value

This is difficult as many of the measures of success are intangible / anecdotal rather than quantifiable. Measures given included: ROI (return on investment); information turnaround; service turnaround; time savings; level of service delivery; level of customer satisfaction; effective access to the right information; information re-use; reduction in physical storage space; reduction in the cost of physical storage; reduction in server space; increased compliance (e.g. number of Freedom of Information / Data Protection / Environmental Information requests satisfied); reduction in the potential cost of litigation as the organisation would have the required evidence for their defence. However, success in one measure might affect another measures, e.g. increasing compliance might increase staff involvement and therefore costs. To establish views on value and appropriate measures, organisations could use collaborative workshops, information councils, scenario-based exercises, etc.

13. Standards, frameworks, architectures, models for enterprise and IT systems

There was strong agreement that these should cover RM. Suggestions of what could be included were: reference to ISO 15489; retention; disposal; information security. One participant thought that RM inclusion should be mandatory. Records professionals need to influence such standards etc. in their organisation. A few examples of inclusion of RM in standards etc. in practice were given. However it was noted that though standards may be included in system specifications, these lacked real commitment in practice.

14. Long-term storage / preservation of e-records

Preferred approaches given were: definition of ‘important’ records; conversion to open formats; XML; data migration; viewers for existing software; **not** emulation; storage in EDRMS; email archiving tools. One participant noted that preservation is not discussed in IT projects, or included in system requirements.

15. Digital signatures

Reasons given for lack of use of digital signatures covered people, process and technology aspects. People aspects were: cost and lack of resources; lack of information insurance; perceptions (digital signatures, compared with paper signatures, were seen as easier to copy, easier to forge, of lower evidential weight, less trustworthy, less able to be validated in the future); lack of vision; lack of knowledge; need for cultural change. Process aspects were: lack of standards; impact on workflow. Technology aspects were: lack of systems / methods; lack of interoperability of technologies. An example of the use of digital signatures in practice was given.

16. Pace of technological change

Legal practices lag behind technology: this was agreed, except for one view that it was an overstatement. One reason for this lag was the perceptions and conservatism of legal professionals. EU governmental action is required, and records professionals should input their views. It would be useful to have real examples of e-records being used as evidence in court cases. Enacting laws takes time – producing codes of practice can be far quicker and more targeted. RM practices lag behind technology: this was also agreed, except for one view that it was an overstatement. Reasons for the lag include: the slow pace of change in organisations, e.g. because of costs of updating technology; EDRMS which replicate paper procedures; and the conservatism of RM professionals. We need involvement of all stakeholders, including records professionals, with IT specialists and vendors to influence developments. RM must become more relevant to business practices. Records professionals may have to compromise on RM principles and methods.

17. Other issues

- Selling benefits of effective RM to senior / middle managers.
- Ensuring that RM is considered as part of the technology change.
- Change management to enable effective use of new systems.
- Masters degree programmes for records professionals do not provide the required ECM project skills and thorough understanding of the IT world.

- The younger generation is both more likely to use, and to expect to use, Web 2.0 and social technologies. However, it also requires a better understanding of the limitations of IT.
- Digital black hole.
- Prohibition of blogs.

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Systems and Technology Facet Delphi Study – Round 2 – Ranking of Issues

Background In Round 2, participants were asked to rank the issues identified in the literature, and supplemented by the comments and discussion in the first round, according to their urgency. Based on the responses to Round 1, the issues were re-organised under 20 headings and the focus was deliberately directed towards purely systems / technical aspects.

Nature of Output Analysis of the participant rankings (tables and charts).

This output consists of the list of issues given to participants; the weighted ranking of the issue groups in line with the responses (bar charts and tables); and a summary view of the rankings (table). The analysis includes an explanation of the weighting method used.

The questionnaires were sent to participants and the analysis compiled in May 2009.

Note: the original list of questions included slightly abridged versions of the summary of Round 1 responses, for the participants' ease of reference. These have been excluded from the list presented here as the summary is available in the immediately preceding pages.

Systems and Technology Facet Delphi Study – Round 2 – List of questions presented to participants

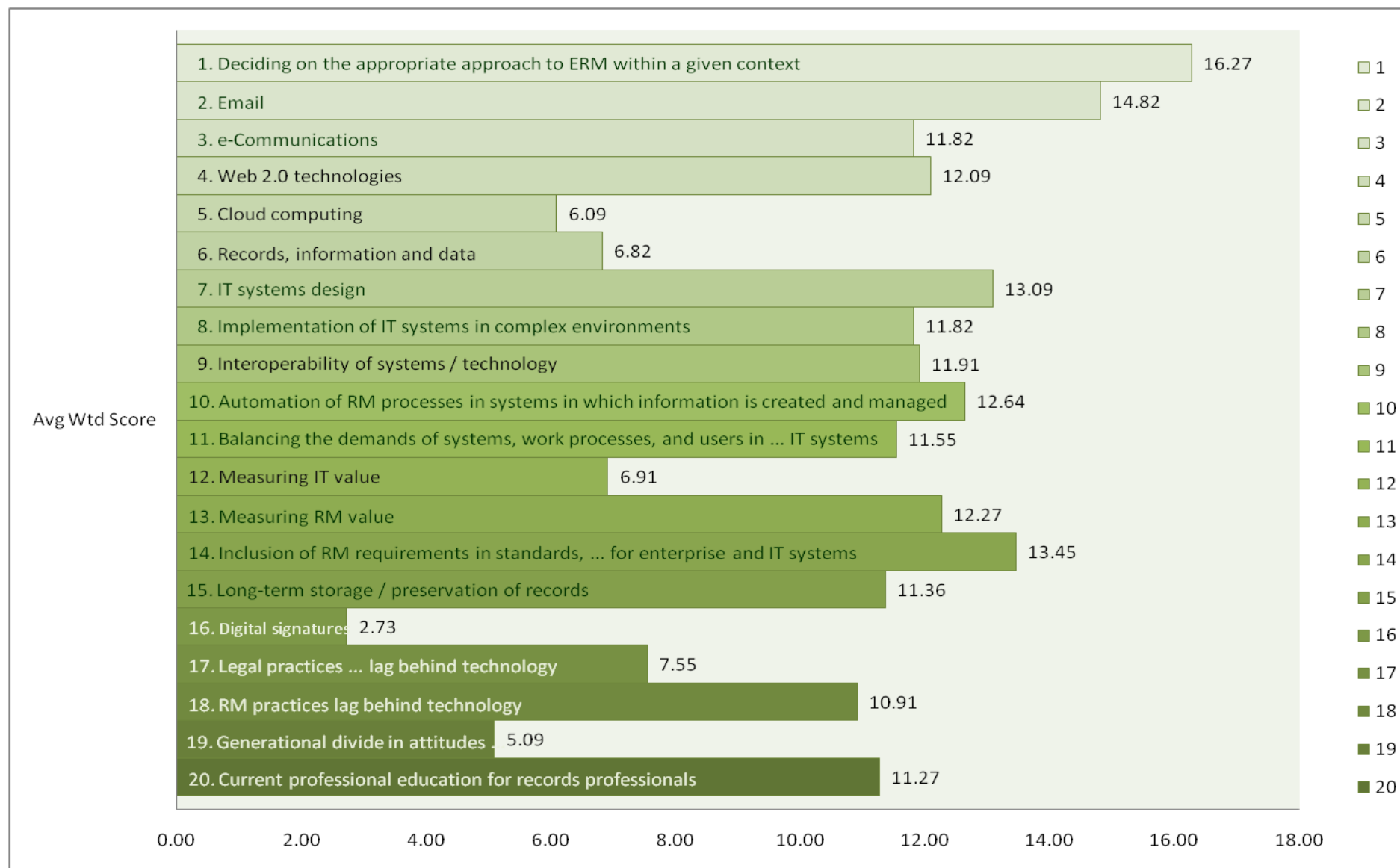
- 1 Deciding on the appropriate approach to ERM within a given context:
e.g. dedicated EDRMS; using existing functionality in line of business, office and mobile systems; bolting on additional RM functionality to line of business, office and mobile systems; or some combination of these
- 2 Email
- 3 e-Communications
- 4 Web 2.0 technologies
- 5 Cloud computing
- 6 Maintaining a distinction between records, information and data in the context of modern technology
- 7 IT systems design
- 8 Implementation of IT systems in complex environments
- 9 Interoperability of systems / technology
- 10 Automation of RM processes in systems in which information is created (e.g. office and line-of-business systems) and managed (e.g. EDRMS, line-of business systems)
- 11 Balancing the demands of systems, work processes, and users in the design and implementation of IT systems
- 12 Measuring IT value
- 13 Measuring RM value
- 14 Inclusion of RM requirements in standards, frameworks, architectures, and models for enterprise and IT systems
- 15 Long-term storage / preservation of records
- 16 Digital signatures
- 17 Legal practices relating to information and records (e.g. data protection / privacy, freedom of information, intellectual property rights) lag behind technology
- 18 RM practices lag behind technology
- 19 Generational divide in attitudes towards and use of technology
- 20 Current professional education for records professionals does not provide them with an adequate understanding of the IT world or with the knowledge / skills to engage with it on equal terms in practice

Designing an organisation-centred architecture for e-RM—The systems and technology issues

In Round 2 of the e-Delphi Study, participants were asked to rank the issues explored in Round 1 in order of urgency. The results are shown in the following tables and graphs.

	Issue for Ranking
1	Deciding on the appropriate approach to ERM within a given context
2	Email
3	e-Communications
4	Web 2.0 technologies
5	Cloud computing
6	Maintaining a distinction between records, information and data in the context of modern technology
7	IT systems design
8	Implementation of IT systems in complex environments
9	Interoperability of systems / technology
10	Automation of RM processes in systems in which information is created and managed
11	Balancing the demands of systems, work processes, and users in the design and implementation of IT systems
12	Measuring IT value
13	Measuring RM value
14	Inclusion of RM requirements in standards, frameworks, architectures, and models for enterprise and IT systems
15	Long-term storage / preservation of records
16	Digital signatures
17	Legal practices relating to information and records lag behind technology
18	RM practices lag behind technology
19	Generational divide in attitudes towards and use of technology
20	Current professional education for records professionals does not provide them with an adequate understanding of the IT

Ranking – Average Weighted Score (by issue)



Ranking – Average Weighted Score (by score)

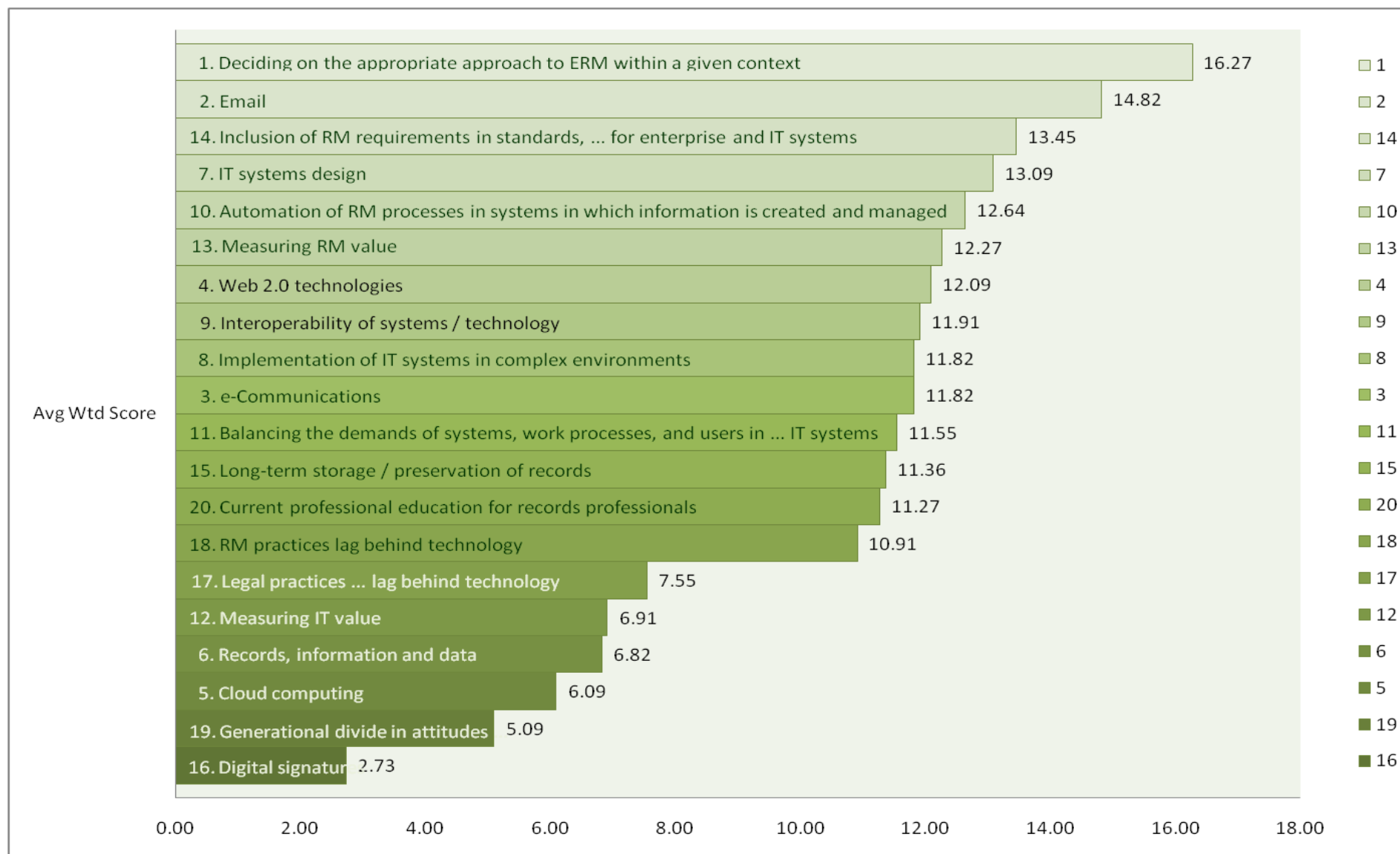


Chart Data - by Issue

Issue	Avg Score
1	16.27
2	14.82
3	11.82
4	12.09
5	6.09
6	6.82
7	13.09
8	11.82
9	11.91
10	12.64
11	11.55
12	6.91
13	12.27
14	13.45
15	11.36
16	2.73
17	7.55
18	10.91
19	5.09
20	11.27

Chart Data - by Score

Issue	Avg Score
1	16.27
2	14.82
14	13.45
7	13.09
10	12.64
13	12.27
4	12.09
9	11.91
3	11.82
8	11.82
11	11.55
15	11.36
20	11.27
18	10.91
17	7.55
12	6.91
6	6.82
5	6.09
19	5.09
16	2.73

A weighting from 20 to 1 in order of importance has been assigned to the selections made, then divided by the number of responses to arrive at the average weighted score.

Example:

No participant gave a ranking of 1 ('most urgent') to Issue (6), 1 gave a ranking of 2, and so on.

A weighting of 20 is applied to those ranked 1, 19 to those ranked 2, etc.

Weighted Score = $20 \times 0 + 19 \times 1 + 18 \times 0 + 17 \times 1 + \dots + 4 \times 1 + 3 \times 3 + 2 \times 1 + 1 \times 1$

Average Weighted Score = $\frac{\text{Weighted Score}}{11}$

Number of votes per ranking per issue

Rank	Issues																			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
1	3	2	0	0	1	0	0	1	0	0	0	0	1	1	0	0	0	0	0	2
2	1	3	0	1	0	1	1	0	1	1	0	0	1	1	0	0	0	0	0	0
3	1	1	2	2	0	0	1	0	0	2	2	0	0	0	0	0	0	0	0	0
4	2	0	0	0	0	1	0	1	0	1	1	0	0	2	1	0	0	2	0	0
5	1	0	0	0	0	0	1	0	1	1	1	0	1	0	4	0	0	1	0	0
6	2	0	2	1	0	0	0	0	2	1	0	0	0	1	0	0	1	0	0	1
7	0	1	0	1	1	0	1	0	0	0	1	1	0	1	1	0	0	1	1	1
8	0	0	2	1	0	0	2	1	0	0	1	0	2	2	0	0	0	0	0	0
9	0	0	0	0	0	1	2	3	2	0	0	0	1	0	0	0	0	1	0	0
10	0	1	1	0	0	0	0	2	1	2	0	0	2	0	0	0	0	1	0	2
11	0	2	0	1	0	0	1	1	1	0	0	2	0	1	0	0	2	0	1	0
12	0	0	1	0	0	0	1	0	1	0	1	0	1	0	1	0	1	2	0	1
13	0	0	0	1	1	0	1	0	1	0	0	2	1	0	1	0	0	0	2	1
14	0	0	1	1	0	0	0	1	0	1	1	2	0	0	1	0	2	1	0	1
15	0	0	1	1	0	1	0	0	0	1	1	0	0	1	0	1	2	0	0	1
16	0	0	1	1	2	1	0	1	0	0	1	1	0	0	0	2	2	0	0	0
17	0	0	0	0	2	1	0	0	1	0	1	0	0	1	1	0	0	2	2	0
18	0	1	0	0	1	3	0	0	0	0	0	1	1	0	0	1	1	0	1	1
19	1	0	0	0	1	1	0	0	0	0	0	2	0	0	1	4	0	0	1	0
20	0	0	0	0	2	1	0	0	0	1	0	0	0	0	0	3	0	0	3	0
All	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11
Weighted Score	179	163	130	133	67	75	144	130	131	139	127	76	135	148	125	30	83	120	56	124
Avg W't'd Score	16.27	14.82	11.82	12.09	6.09	6.82	13.09	11.82	11.91	12.64	11.55	6.91	12.27	13.45	11.36	2.73	7.55	10.91	5.09	11.27

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Systems and Technology Facet – Delphi Study – Round 3 – Proposed Solutions

Background In Round 3, the participants were provided with a list of seven key issues – some with sub-divisions – that had been selected based on their rankings from the previous round, the data already available from the People and Process Delphi Studies, and the team's desire to explore solutions in greater depth rather than greater breadth.

Participants were asked to suggest, from their own knowledge and experience, solutions either to try or to avoid. They were also invited to give, where applicable, the names of IT systems or products (e.g. SharePoint), techniques, specifications / protocols (e.g. XML), etc.; and to note whether the solutions were subject to significant variations between different industries, sectors, jurisdictions, and countries.

Nature of Output Summary of solutions proposed to the issues identified and prioritized in Rounds 1–3 (text).

This output consists of the questions put to the participants and the summary of their responses. The wording of the responses is derived from the 'coded' versions used for analysis; this version has been 'polished up' from the interim output of June 2009 but has not been fully rephrased into natural language.

The questionnaires were sent to participants in May 2009 and the summary was compiled in June 2009.

Systems and Technology Facet Delphi Study – Round 1 – List of questions / issues presented to participants

The seven key issues (in ranked order):

- a) The appropriate approach to ERM within a given context
- b) Email – managing the records in email systems
- c) IT systems design
- d) Interoperability of systems / technology
- e) Web 2.0 technologies
- f) Automation of RM processes in systems which *create* information. Automation of RM processes in systems which *manage* information
- g) IT systems in complex environments

a The appropriate approach to ERM within a given context *Ranked 1st*

1. Dedicated EDRMS;
2. Using existing functionality in line-of-business / office / mobile systems;
3. Embedding RM functionality in line-of-business / office / mobile systems;
4. Integrating EDRMS with other corporate IT systems
5. Some combination of these.

Round 1 responses on this issue indicated that the majority felt that no one of these approaches was ‘the answer’ in isolation or in all contexts. Many of the reasons given related to organisational and cultural factors.

- What we are interested in addressing in this round are the more technology-specific factors that have contributed to success or failure in implementing IM and RM.

a.1 *Dedicated EDRMS*

- Where a dedicated, stand-alone EDRMS has been deployed, what are the technical factors that have made it more or less successful as a solution?
- Can SharePoint be effectively deployed as an EDRMS?

a.2 *Using existing functionality in line-of-business, office and mobile systems*

“Many pieces of software which RM professionals criticise as being lacking in ERM functionality, have increasing amounts of end-user ERM functionality” – examples are Word 2007 and Acrobat 9.

- Has the latent functionality of office and other corporate applications ever been fully realised in practice? Does it meet IM / RM requirements to a significant extent?

a.3 *Embedding RM functionality in line-of-business, office and mobile systems*

- Into which types of business system is it appropriate to embed RM functionality? All, or only some?
- Are there any types of (non-records) business system which currently incorporate a significant level of RM functionality as a matter of course? Are there any specific proprietary or open-source systems that have succeeded in doing this?
- Where RM systems providers have been taken over by bigger players in the IT world – “Oracle, HP, EMC, Microsoft, Autonomy, etc” – has this led to a greater integration of RM functionality into other business systems / applications provided by the same company?

a.4 Integrating EDRMS with other corporate IT systems

“In our experience, Hummingbird seamlessly integrated with the office suite.”

- Is this a common experience, either with Hummingbird or with other specific EDRMS systems?
- Have issues other than the technical or the organisational / cultural proved a significant impediment in practice? (Examples include the costs of licensing arrangements for creating interfaces for interoperability between different proprietary applications, or the lack of thoroughgoing standardisation).
- What are the primarily technological aspects of SharePoint that make it an effective tool (or, conversely, a poor choice) for achieving integration / seamless processes?

a.5 A combination of approaches

- What are the primarily technological aspects and elements of combined approaches that have been tried in practice?
- Is each instance essentially unique to the organisation in which it is implemented, or are there certain approaches that are generic to wider (even if still limited) contexts?

b eMail – managing the records in email systems *Ranked 2nd*

Most of you agreed that the lack of RM functionality in email systems was a cause for concern. Options for addressing this are:

- using the email system as is;
- embedding RM functionality in the email system;
- linking email systems with EDRMS; or
- a combination of these.

We are now looking for more specific detailed examples of how these options have been implemented, what it was that made them appropriate, how they worked / did not work. These could include but are not restricted to:

- From your own perspective What specific functionality in email systems is being used for RM and how (e.g. templates, folders)?
- How has email been integrated with EDRMS (e.g. automatic transfer of records; Symantec eVault; Autonomy / Zantaz / Meridio)?
- What specific techniques could be used to manage email (e.g. de-duplication; smart categorisation; automatic metadata addition; smart automatic destruction)?
- What processes can be implemented to easily identify records in email systems and manage them from an operational perspective (e.g. using blogs for broadcast messages, wikis for collaboration)?
- What specific functionality in email systems has improved and how (e.g. email archiving)?
- Alternatively, we should not use email as a recordkeeping system. How could this be accomplished?

c IT systems design *Ranked 4th*

The Round 1 exploration of this issue focused on (a) usability and end-user involvement, and (b) involvement of IM / RM professionals in systems design.

What we are interested in addressing in this round are specific design factors that have contributed to success or failure in usability and IM / RM capability. These could include but are not restricted to:

- “If users hate using the system, they will not use it. RM interfaces cannot afford to be clunky.”
What systems and software (or combinations of these) are noticeably better or worse in providing a user-friendly interface for ERM? Did the benefits or problems lie in existing ‘out-of-the-box’ design features, in customisation, in the architecture, or elsewhere?
- Are design trade-offs inevitable—e.g. between legal requirements and aesthetic considerations, consistency and flexibility, etc? How do these work out in practice?
- “RM is a component of everybody’s day to day life so systems need to integrate and be seamlessly embedded or they won’t be used.” Which systems and software (or combinations of these) are noticeably better or worse at achieving this?

d Interoperability of systems / technology *Ranked 5th*

- d.1** Among the Round 1 responses on this issue were specific mentions of a framework (e-GIF – the UK e-Government Interoperability Framework) and an approach (the use of middleware) for facilitating or effecting interoperability.

Again, we are interested in addressing the specific elements of these (or any other) solutions.

- What are the main architectural and technological impacts of e-GIF (and comparable frameworks in other jurisdictions and countries) on both EDRMS and line-of-business systems?
- Are there any instances where e-GIF-type frameworks have been implemented in a thoroughgoing and robust manner? If so, what were the critical success factors?
- In the case of middleware, can you give any examples of software / hardware products, design and implementations that have been noticeably better or worse at achieving interoperability in practice?

d.2 *Aspects for further clarification or exploration.*

- How you would differentiate between ‘integration’ and ‘interoperability’, and which approach has proved more fruitful in practice?
- Have issues other than the technical or the organisational / human proved a significant impediment in practice? (Examples include the costs of licensing arrangements for creating interfaces for interoperability between different proprietary applications, or the lack of thoroughgoing standardisation).

e Web 2.0 technologies *Ranked 6th*

Three basic approaches emerged from Round 1, which can be characterised by the following positions:

- “Organisations should embrace these technologies and establish how best they work for the business”;
- Restrict the use of Web 2.0 to certain business purposes only, or to personal or experimental use.
- “Web 2.0 is completely contrary to good RM and the needs of organisations”, and prohibition of its use should be written into staff employment contracts.

Many Round 1 responses suggested addressing the use of these technologies through policies, guidelines and managing behaviour.

One technological suggestion, however, was to deploy enterprise solutions that combined the flexibility and ease of use of the new technologies with the greater control required for authentication, audit and compliance.

We are now interested primarily in identifying more technology-driven rather than policy-driven solutions.

- How has the use of Web 2.0 technologies been integrated with enterprise applications and systems in practice?
Has this occurred seamlessly, through an ‘invisible’ interface layer, or has it depended on user ‘declaration’ of corporate information or records?
- If Web 2.0 technologies are to be used only in certain business areas, what areas should these be?
- If access to Web 2.0 technologies is to be heavily controlled or locked down, should this apply to all staff and all uses within an organisation? When and where would this approach be beneficial? When and where might it be counterproductive?

- f Automation of RM processes in systems in which information is **created**** (e.g. office and line-of-business systems).

Automation of RM processes in systems in which information is **managed** (e.g. EDRMS, line-of business systems) *Ranked 7th*

Three basic approaches emerged from Round 1, which can be characterised by the following positions:

- “Organisations should embrace these technologies and establish how best they work for the business”;
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- “Web 2.0 is completely contrary to good RM and the needs of organisations”, and prohibition of its use should be written into staff employment contracts.

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- If access to Web 2.0 technologies is to be heavily controlled or locked down, should this apply to all staff and all uses within an organisation? When and where would this approach be beneficial? When and where might it be counterproductive?

- g IT systems in complex environments *Ranked 8th***

Complex environments include

- multinationals;
- geographically distributed organisations;
- customer supply chains;
- the UK National Health Service (NHS);
- central government;
- multi-partner projects;
- with complex / multiple IT systems, business processes, and people relationships.

Most of the reasons given to explain why IT systems did not cope well with complex environments were related to people and processes. We are now interested in finding out more about technical solutions. For example:

- Enterprise architecture to align IT systems with business processes; e.g. thinking of RM as a service, not as software
- A modular approach not a single all-encompassing solution
- Multiple IT systems for specific processes which feed into data warehouses for sharing (e.g. finance, HR, with SharePoint front end)
- Multiple IT systems for cross-system search & retrieval
- Fewer and more generic solutions used for multiple purposes (e.g. case management system used for project management)

Systems and Technology Facet Delphi Study – Round 3 – Summary of participant responses

(A) The Appropriate Approach to ERM Within a Given Context

(A.1) Dedicated EDRMS

Positive Factors / Reasons for Success

- modular approach
- EDRMS as final repository for records not in daily use – encourage users to use it in this way
- Web-based EDRMS
- solutions should be:
 - industry-specific
 - application-specific
 - complete, 'fully worked up'
- integration:
 - tight integration with office systems
 - integration with SharePoint
 - tight integration with business systems
- functionality (particularly balance between functionality and usability)
- usability (particularly balance between functionality and usability)
- user interface needs to be:
 - good
 - familiar, similar to corporate desktop
 - intuitive
 - user-friendly
- accessibility – work with applications (special needs)
- certification (e.g. The National Archives (TNA/PRO))
- configurability
- file-plan:
 - user-agreed, not imposed
 - usable
 - not complex
 - easy to update
 - easy to edit after installation
- metadata capture – automatic, where possible
- performance meets targets (responsiveness)
- scalability
- search capability

Negative Factors / Reasons for Failure

- lack of use of middleware
- commercial, off-the-shelf (COTS) products used without consideration of degree of customisation required
- factors / reasons frequently non-technical
- requirement for users to declare records
- lack of ability to un-declare records after declaration
- increasing time spent on simple tasks
- lack of draft document area
- excessively large folders

EDRMS Named Products – Views on Characteristics

Documentum

- open architecture
- modular approach
- high functionality, possibly too high for ‘average’ contexts
- high complexity, possibly too high for ‘average’ contexts
- weak usability
- excellent configuration
- excellent scalability
- excellent resilience
- good BPM capability
- extensive API catalogue
- use more appropriate in highly regulated environment
- not for ‘average’ user

LiveLink

- good integration with office systems
- right functionality / usability balance
- good user interface

Meridio

- compliance with e-government standards
- right balance between functionality and usability
- good user interface
- excellent integration with office systems
- integration with SharePoint is superfluous, as Meridio already integrates well with Microsoft products
- integration with SharePoint works well
- excellent scalability
- merger with Autonomy provides additional capabilities

SharePoint for RM

- weak architecture
- weak functionality
- good integration with Microsoft environment
- integration of older versions with MS Office
- weak integration with non-Microsoft environment
- significant customisation required

SharePoint front end to EDRMS (generic)

- cheap solution
- weak information architecture
- good RM / DM capability
- good search
- good portal
- good workflow capability
- weak scalability
- weak integration with IT systems

TRIM

- approved under TNA (The National Archives) certification model
- excellent configuration
- good integration with office systems
- good user interface

(A.2) Using Existing Functionality in Line-of-business, Office and Mobile Systems

Negative Factors / Reasons for Failure

- lack of integration capability between SharePoint and older versions of MS Office
- organisations' preference for basic, cheap RM capability, e.g. NT FileStore folders
- organisations fail to use full potential of systems
- use not strategically driven
- use driven by individuals / business units
- lack of exploitation by users
- metadata capture by users – users perceive this causes extra work, therefore avoidance of systems by users

Methods for Encouraging Use

- requires promotion by organisations
- configuration (e.g. defaults) by IT department to remove burden from end-users – this requires educating of IT department

Examples of 'Systems'

- rudimentary document management system, e.g. using a combination of shared network drives, file-plans and Windows Explorer access-control features
- shared drives as 'EDRMS'
- intranet as 'EDRMS'
- customisation of MS Outlook through use of dashboard: e.g. emails (sent and received) organised in functional folders, enabling selection by users of end-of-thread emails for records capture
- office systems
 - document templates
 - custom metadata
 - track changes
 - property screens

(A.3) Embedding RM Functionality in Line-of-business, Office and Mobile Systems

Positive Factors / Reasons for Success

- appropriate for some systems / some information only
- most financial systems (e.g. SAP) have embedded RM functionality
- embedded RM functionality of line-of-business systems provides basic RM capability
- XML-based archiving systems (raw content) enables re-purposing but lack of RM functionality, e.g. EMC Corp
- email archiving systems have basic RM capability

Takeover of EDRMS Providers by Major IT Systems Providers

Examples: IBM took over FileNet, Oracle took over Stellent, EMC Corp took over Documentum, Autonomy took over Meridio

Positive Factors / Reasons for Success

- major systems providers' awareness of RM professionals' needs is increased
- success, e.g. Autonomy takeover of Meridio
- enhanced ERM capability and great integration and automation potential, e.g. combination of Zantaz (email system) and EMC Corp

Negative Factors / Reasons for Failure

- major systems providers lack understanding of business processes
- major systems providers lack understanding of RM
- lack of ability for integration of different systems, gaps too great: e.g. Oracle, EMC Corp, Stellent

(A.4) Integrating EDRMS With Other Corporate IT Systems

Positive Factors / Reasons for Success

- all EDRMS integrate 'reasonably well' with MS Office
- EDRMS – use as back-end file store with as many line-of-business systems as possible
- database systems integrated with EDRMS: process-related documents and document-related data stored in EDRMS
- SharePoint front end, EDRMS back end

Negative Factors / Reasons for Failure

- most EDRMS lack of integration
- most EDRMS lack interoperability
- poor EDRMS integration with IT other systems
- lack of products
- web interface preferred by vendors; 'thick client' interface preferred by users
- licensing costs

Requirements for Integration

- development of non-EDRM IT systems, e.g. using XML
- non-EDRM IT systems with compatible software versions
- expensive programming
- huge amount of technical support

(A.5) A Combination of Approaches

Positive Factors / Reasons for Success

- build bespoke middleware, e.g. with XML
- application programming interfaces (APIs) within EDRMS
- event models within EDRMS
- workflow tools
- legacy information systems plus repositories
- OCR documents managed by OCR applications (e.g. Omnipage), with storage in EDRMS (e.g. Hummingbird)
- hybrid systems tracking physical records, e.g. Iron Mountain Connect; SharePoint

Negative Factors / Reasons for Failure

- combined ERM approach rare
- implementation expense exceeds expectations, e.g. SharePoint
- implementation at departmental level
- lack of analysis of gaps between current and future configuration
- lack of awareness of requirements for change management by organisation
- lack of investment in change management by organisation
- EDRMS licensing costs
- cost of integration

Requirements for Implementation

- strategic-level planning
- analysis of requirements
- use for well-defined processes
- EDRMS at centre, replacement of existing systems in organisation

(B) Email – Managing the Records in Email Systems

Positive Factors / Reasons for Success

Approaches

- do anything rather than do nothing
- unlimited storage plus search
- automatically delete all emails from email system after fixed period

Techniques

- save important / required emails on shared drive in .msg format
- store / archive important / required emails in paper format
- save important / required emails in EDRMS
- email archiving systems
- capture emails based on function / subject, not format
- preservation / storage: use pre-populated fields
- retention decisions by staff
- EDRMS file-plan accessible via Microsoft Outlook – facilitation of one-click filing
- EDRMS configuration enables easy capture of emails, e.g. automatic classification and metadata addition
- Autonomy, 'Intelligent classifier'

Negative Factors / Reasons for Failure

- avoiding email management issues: worst approach 'by far'
- prohibit use of email systems as recordkeeping systems – they encourage silo approach
- email frequently not considered in EDRMS implementations
- EDRMS – avoid as sole approach for email management, because:
 - manual filing – lack of success
 - lack of single instancing – lack of success
 - requirements for filing single items in multiple locations – lack of success
 - lack of storage in shared locations – lack of success
 - email archiving systems' high volume of transactions requires greater functionality
- lack of systems
- lack of acceptance of automatic categorisation
- lack of acceptance of automatic ingestion
- requirement for manual filing
- poor archiving
- email archiving systems lack RM functionality
- email archiving systems in absence of EDRMS implementation
- email archiving systems server overload, e.g. KVS Vault (weak purging capability)

(C) IT Systems Design

Positive Factors / Reasons for Success

- separate recordkeeping systems only work in organisations, not in personal lives
- traditional line-of-business systems, e.g. finance, purchasing, HR, have poor user interface but good RM controls
- systems requirements for functionality
- systems requirements for usability
- systems requirements for tight integration with desk top and Microsoft Office
- familiar user interface; 'similar to existing systems'
- most IT systems have user interface capable of customisation, e.g. screen resolution, colour in native Windows, Dragon for voice input, keyboard choices in Windows
- usability

Negative Factors / Reasons for Failure

- systems – lack of integration in practice
- over-theoretical EDRMS approach resulting in poor user interface and additional recordkeeping tasks
- excessive focus on users may cause lack of achievement of EDRMS potentiality
- poor user interface causes slow productivity resulting in 'hatred of' RM

Requirements for Good Design

- off-system systems analysis, e.g. file-plan, metadata, business requirements, user requirements, RM requirements
- involvement of users
- involvement of information professionals
- specialist users
- EDRMS design – need for compromise between usability and functionality
- IM / RM requires specification and rules for control within system constraints
- configuration processes ('ways of working') requires acceptance of constraints by real users
- just a little customisation by organisation creates of perception belonging to organisation
- addition of modules to existing systems for communication with EDRMS
- how systems support functional requirements requires analysis
- systems support of functional requirements requires assessment of IT maturity level within organisation
- systems support of functional requirements requires assessment of IT maturity level of end-users

(D) Interoperability / Integration of Systems / Technology

Definitions – Distinction between Interoperability and Integration

- integration: nature of solutions – closer links, companion systems
- interoperability: nature of solutions – looser links, similar systems
- integration: definition – seamless alignment between different systems in perception of end-user, e.g. filing MS Word documents in EDRMS using enhanced Microsoft Office menu options
- interoperability: definition – ability to communicate between different systems, e.g. link unstructured financial documents by ERPS (enterprise resource planning system) within EDRMS

Positive Factors / Reasons for Success

- seamless IM requires interoperability and integration: interoperability supports specialist business process; integration supports day-to-day IM
- IM strategies: choosing to prioritise functionality and / or usability means compromise on integration, interoperability
- IM strategies: choosing to select the same platform (e.g. Oracle), means compromise on functionality
- integration approach is more common
- success of integration depends on funding: costs of proactive / productive work borne by implementers
- interoperability can potentially be achieved by XML, HTML
- success of interoperability depends on funding; lower costs of open source products, SOA (service-oriented architecture) products
- interoperability – potential investment by third party
- interoperability framework applicable in MANs (metropolitan area network)
- interoperability framework applicable in WANs (wide area network)
- metadata frameworks as guide only
- common taxonomy in all systems in organisation

Negative Factors / Reasons for Failure

- typical EDRMS implementation does not use middleware
- typical EDRMS implementation uses commercial, off-the-shelf products (COTS) without consideration of degree of customisation required
- most EDRMS lack integration, interoperability
- interoperability approach is less common
- problems in linking different systems – different technologies; different platforms
- lack of systems integration results in failure to meet expectations / promises
- interoperability framework not applicable in LANs (local area network)
- eGIF interoperability framework lacks focus on RM
- eGIF interoperability framework XML mandates – frequent lack of actual implementation
- metadata frameworks create system that is too generic, not fit for purpose, not tailored to organisational needs
- actual needs for information infrequent across boundaries in European Union
- TNA EDRMS specifications mandate transfer of EDRMS content to TNA, but this is difficult as EDRMS metadata cannot be exported

Impediments to EDRMS Integration with Other IT Systems

- licensing costs
- prohibitive IT systems cost
- IT systems building time causes frustration among users
- legacy hardware
- legacy software

Requirements for Interoperability

- actual information-sharing needs require understanding eGIF interoperability framework
- interoperability requires avoiding a theoretical approach at present ('market not quite there'; 'not yet an SOA world')

(E) Web 2.0 Technologies

Positive Factors / Reasons for Success

- official organisation presence in all Web 2.0 technology – use by staff
- use of free web software saves cost for organisation
- management of only important 'bread and butter' records creates confidence that RM is good; therefore staff use of Web 2.0 technology (e.g. Twitter) for non-core information is unimportant
- applications in cloud computing systems are better in comparison with workplace systems
- cloud computing systems need to be backed up within workplace
- SaaS (software as a service) systems encouraged by security professionals; greater records security in comparison with external devices or moving data
- Web 2.0 technology – greatest benefits are for mobile, home, and collaborative working
- Web 2.0 technology collaboration by government because of project security, not RM service
- recordkeeping easy / comfortable by users in domestic lives; 'tool of choice' – social networks, bookmarks, file sharing, photo sharing
- restrictive, 'lock down' approach to Web 2.0 technology is barely feasible

Negative Factors / Reasons for Failure

- lack of integration of Web 2.0 technology with business process
- many organisations have security concerns about Web 2.0 technology, non-corporate systems
- Web 2.0 technology: much discussion, little implementation
- cloud computing systems: storage services too new and therefore not fully exploited
- SaaS systems: storage services too new and therefore not fully exploited
- social bookmarking flawed because of frequently changing web links
- restrictive, 'lock down' approach to Web 2.0 technology – not a good approach
 - causes purchase of separate enterprise version at higher cost
 - did not capture all telephone messages, so why need to capture all Web 2.0 items
 - users will adopt other new technologies tomorrow

(F) Automation of RM Processes in Systems in Which Information is Created (e.g. Office and Line-of-business Systems).

Automation of RM Processes in Systems in Which Information is Managed (e.g. EDRMS, Line-of-business Systems)

Positive Factors / Reasons for Success

- areas emerging for RM processes automation
- desirability of RM processes automation
- automation of common business processes causes records capture
- workflow exploitation of potential assistance in automating RM processes
- RM processes suitable for automation:
 - records declaration
 - metadata capture (where possible)
 - filing
 - retention
 - archiving
 - refreshing
- RM processes automation success:
 - file-plan application at folder level
- techniques for RM processes automation:
 - record templates – use for
 - automatic classification
 - automatic filing
 - requires:
 - definition of record templates by organisation
 - definition of rules by organisation
- systems prompts have great potential

Negative Factors / Reasons for Failure

- need for manual filing and records declaration ‘deeply flawed’
- attempting to automate manual processes exactly
- simplistic, ‘blind’ automation of RM processes
- avoidance of classification / categorisation of documents
- automation of RM processes alarms some records professionals
- RM processes unsuitable for automation:
 - appraisal
 - disposal
- organisations lack awareness of need to define record templates
- organisations lack awareness of need for record template rules
- workflow systems unable to accommodate all business units in an organisation
- workflow systems implementation requires:
 - definition of workflows by technically advanced users
 - technically advanced users

(G) IT Systems in Complex Environments

Positive Factors / Reasons for Success

- aspects of SOA approach
- enterprise architecture an essential element
- correct information architecture
- systems design generic within organisation:
 - all systems have similar user interface
 - all systems have similar terminology
- federated EDRM – modular approach
- tools for search capability across systems
- more than one user interface tailored to user groups; bespoke, creation for EDRMS

Negative Factors / Reasons for Failure

- typical EDRMS implementation does not use SOA approach at present
- enterprise architects lack understanding of IM subtlety
- lack of interest in generic EDRMS approach by organisations / clients
 - organisations / clients require:
 - industry-specific solutions
 - application-specific solutions
 - complete, 'fully worked up' solutions, not toolsets
- the nature of EDRMS as a package – 'bundled together' – inhibits a modular approach
- EDRMS installation on geographically spread computers – software updating difficult
- maintenance of client-machine-based systems difficult

AC⁺erm Output

Systems and Technology Facet Delphi Study – Round 4 – Survey to evaluate proposed solutions

Background In Round 4, participants were asked to complete an online survey to evaluate the solutions proposed in the previous rounds, using a variety of criteria and in a variety of sectoral and organizational contexts.

The headings under which the questions and issues were presented were:

1. ERM approaches
2. Trade-offs
3. Technical aspects
4. Automation
5. eMail strategy
6. eMail techniques
7. Cloud computing
8. Named products / solutions

The surveys were carried out in June 2009.

Nature of Output Survey results (text and tables).

This output consists of the collated results of the survey. This was originally compiled in August 2009.

Stand-alone Electronic Document and Records Management Systems (EDRMS)

From your perspective and experience, please indicate your view of

- (i) the desirability of this approach, and
- (ii) the likelihood that it will be employed,

in the range of contexts given below. Tick the appropriate box.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The # column in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	# Highly desirable	# Likely to happen
All Sectors	1 Agree strongly 2 Agree - Neither agree / disagree - Don't know 2 Disagree - Disagree strongly 1 No answer	- Agree strongly 1 Agree - Neither agree / disagree - Don't know 2 Disagree - Disagree strongly 3 No answer
Public	1 Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 3 No answer	- Agree strongly 5 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 1 No answer
Private (large)	- Agree strongly 1 Agree 1 Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer	1 Agree strongly 2 Agree 1 Neither agree / disagree - Don't know - Disagree - Disagree strongly 2 No answer
Private (SME)	- Agree strongly 1 Agree 1 Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 3 No answer	- Agree strongly 1 Agree - Neither agree / disagree 1 Don't know 3 Disagree - Disagree strongly 1 No answer
Not-for-profit	- Agree strongly - Agree 2 Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer	- Agree strongly - Agree 1 Neither agree / disagree 1 Don't know 2 Disagree - Disagree strongly 2 No answer

Industry / organisation type

	#	Highly desirable	#	Likely to happen
All industries / org. types	1	Agree strongly	-	Agree strongly
	1	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	3	No answer	5	No answer
Construction	-	Agree strongly	-	Agree strongly
	1	Agree	2	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	2	No answer
Education	-	Agree strongly	-	Agree strongly
	2	Agree	3	Agree
	-	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	2	No answer
Energy, utilities and infrastructure	1	Agree strongly	-	Agree strongly
	-	Agree	3	Agree
	1	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	2	No answer
Finance	1	Agree strongly	2	Agree strongly
	1	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	2	No answer
Government (incl. police, armed services)	2	Agree strongly	2	Agree strongly
	1	Agree	3	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	3	No answer	1	No answer
Health	-	Agree strongly	-	Agree strongly
	2	Agree	3	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	2	No answer
Manufacturing	-	Agree strongly	-	Agree strongly
	1	Agree	3	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	2	No answer
Pharmaceutical industry	1	Agree strongly	1	Agree strongly
	1	Agree	3	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	2	No answer
Service industries	-	Agree strongly	-	Agree strongly
	1	Agree	2	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	2	No answer
Other (please specify)	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer

EDRMS integrated with office systems

From your perspective and experience, please indicate your view of

- (i) the desirability of this approach, and
- (ii) the likelihood that it will be employed,

in the range of contexts given below. Tick the appropriate box.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The # column in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	# Highly desirable	# Likely to happen
All Sectors	2 Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 2 No answer	- Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer
Public	2 Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 3 No answer	- Agree strongly 3 Agree 1 Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 1 No answer
Private (large)	1 Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer	- Agree strongly 4 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 2 No answer
Private (SME)	1 Agree strongly - Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer	- Agree strongly 1 Agree - Neither agree / disagree 1 Don't know 2 Disagree - Disagree strongly 2 No answer
Not-for-profit	1 Agree strongly - Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer	- Agree strongly 2 Agree - Neither agree / disagree - Don't know 2 Disagree - Disagree strongly 2 No answer

Industry / organisation type

	#	Highly desirable	#	Likely to happen
All industries / org. types	2	Agree strongly	-	Agree strongly
	2	Agree	3	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	2	No answer	3	No answer
Construction	-	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Education	-	Agree strongly	-	Agree strongly
	1	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Energy, utilities and infrastructure	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Finance	-	Agree strongly	-	Agree strongly
	1	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Government (incl. police, armed services)	1	Agree strongly	-	Agree strongly
	1	Agree	2	Agree
	-	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	3	No answer
Health	-	Agree strongly	-	Agree strongly
	1	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	2	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Manufacturing	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Pharmaceutical industry	-	Agree strongly	-	Agree strongly
	1	Agree	2	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Service industries	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	1	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Other (please specify)	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer

EDRMS integrated with line-of-business (LOB) systems

From your perspective and experience, please indicate your view of

- (i) the desirability of this approach, and
- (ii) the likelihood that it will be employed,

in the range of contexts given below. Tick the appropriate box.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The # column in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	# Highly desirable	# Likely to happen
All Sectors	<ul style="list-style-type: none"> 1 Agree strongly 3 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 2 No answer 	<ul style="list-style-type: none"> - Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer
Public	<ul style="list-style-type: none"> 2 Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 3 No answer 	<ul style="list-style-type: none"> - Agree strongly 4 Agree 1 Neither agree / disagree - Don't know - Disagree - Disagree strongly 1 No answer
Private (large)	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer 	<ul style="list-style-type: none"> - Agree strongly 3 Agree - Neither agree / disagree 1 Don't know - Disagree - Disagree strongly 2 No answer
Private (SME)	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer 	<ul style="list-style-type: none"> - Agree strongly - Agree - Neither agree / disagree 1 Don't know 3 Disagree - Disagree strongly 2 No answer
Not-for-profit	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer 	<ul style="list-style-type: none"> - Agree strongly - Agree - Neither agree / disagree 1 Don't know 3 Disagree - Disagree strongly 2 No answer

Industry / organisation type

	#	Highly desirable	#	Likely to happen
All industries / org. types	1	Agree strongly	-	Agree strongly
	3	Agree	2	Agree
	-	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	2	No answer	3	No answer
Construction	-	Agree strongly	-	Agree strongly
	1	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	2	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Education	-	Agree strongly	-	Agree strongly
	1	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Energy, utilities and infrastructure	1	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	3	No answer
Finance	-	Agree strongly	-	Agree strongly
	1	Agree	2	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Government (incl. police, armed services)	2	Agree strongly	-	Agree strongly
	1	Agree	3	Agree
	-	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	3	No answer	2	No answer
Health	1	Agree strongly	-	Agree strongly
	1	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	2	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	3	No answer
Manufacturing	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Pharmaceutical industry	1	Agree strongly	-	Agree strongly
	1	Agree	3	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	4	No answer	3	No answer
Service industries	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	2	Don't know
	1	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Other (please specify)	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer

EDRMS integrated with Web 2.0 technologies

From your perspective and experience, please indicate your view of

- (i) the desirability of this approach, and
- (ii) the likelihood that it will be employed,

in the range of contexts given below. Tick the appropriate box.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The # column in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	# Highly desirable	# Likely to happen
All Sectors	<ul style="list-style-type: none"> 1 Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 3 No answer 	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer
Public	<ul style="list-style-type: none"> 1 Agree strongly 1 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 3 No answer 	<ul style="list-style-type: none"> - Agree strongly 3 Agree 1 Neither agree / disagree - Don't know - Disagree - Disagree strongly 2 No answer
Private (large)	<ul style="list-style-type: none"> - Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer 	<ul style="list-style-type: none"> 1 Agree strongly 1 Agree - Neither agree / disagree 1 Don't know - Disagree - Disagree strongly 3 No answer
Private (SME)	<ul style="list-style-type: none"> - Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer 	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree 1 Don't know 1 Disagree - Disagree strongly 3 No answer
Not-for-profit	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer 	<ul style="list-style-type: none"> - Agree strongly - Agree - Neither agree / disagree 1 Don't know 1 Disagree 1 Disagree strongly 3 No answer

Industry / organisation type

	# Highly desirable	# Likely to happen
All industries / org. types	1 Agree strongly 3 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 1 No answer	- Agree strongly 2 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 3 No answer
Construction	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly - Agree 1 Neither agree / disagree 1 Don't know - Disagree - Disagree strongly 4 No answer
Education	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly 1 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer
Energy, utilities and infrastructure	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly 1 Agree - Neither agree / disagree 1 Don't know - Disagree - Disagree strongly 4 No answer
Finance	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer
Government (incl. police, armed services)	1 Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 5 No answer	- Agree strongly 1 Agree 2 Neither agree / disagree - Don't know - Disagree - Disagree strongly 3 No answer
Health	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly - Agree - Neither agree / disagree 1 Don't know 1 Disagree - Disagree strongly 4 No answer
Manufacturing	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly - Agree 1 Neither agree / disagree 1 Don't know - Disagree - Disagree strongly 4 No answer
Pharmaceutical industry	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly 1 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer
Service industries	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly - Agree - Neither agree / disagree 2 Don't know - Disagree - Disagree strongly 4 No answer
Other (please specify)	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer

Use of office systems' existing functionality

From your perspective and experience, please indicate your view of

- (i) the desirability of this approach, and
- (ii) the likelihood that it will be employed,

in the range of contexts given below. Tick the appropriate box.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The # column in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	# Highly desirable	# Likely to happen
All Sectors	<ul style="list-style-type: none"> 1 Agree strongly 1 Agree 1 Neither agree / disagree - Don't know - Disagree 1 Disagree strongly 2 No answer 	<ul style="list-style-type: none"> - Agree strongly 3 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 2 No answer
Public	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree 1 Disagree strongly 4 No answer 	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 4 No answer
Private (large)	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 5 No answer 	<ul style="list-style-type: none"> 1 Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 5 No answer
Private (SME)	<ul style="list-style-type: none"> - Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 5 No answer 	<ul style="list-style-type: none"> - Agree strongly - Agree - Neither agree / disagree 1 Don't know - Disagree - Disagree strongly 5 No answer
Not-for-profit	<ul style="list-style-type: none"> - Agree strongly - Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 5 No answer 	<ul style="list-style-type: none"> - Agree strongly - Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 5 No answer

Industry / organisation type

	#	Highly desirable	#	Likely to happen
All industries / org. types	2	Agree strongly	-	Agree strongly
	1	Agree	3	Agree
	1	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	2	No answer	2	No answer
Construction	-	Agree strongly	-	Agree strongly
	1	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Education	-	Agree strongly	-	Agree strongly
	1	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Energy, utilities and infrastructure	-	Agree strongly	-	Agree strongly
	1	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Finance	1	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Government (incl. police, armed services)	-	Agree strongly	-	Agree strongly
	1	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	1	Disagree
	1	Disagree strongly	-	Disagree strongly
	4	No answer	4	No answer
Health	-	Agree strongly	-	Agree strongly
	1	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Manufacturing	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Pharmaceutical industry	1	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Service industries	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	1	Don't know	1	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Other (please specify)	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer

Use of line-of-business (LOB) systems' existing functionality

From your perspective and experience, please indicate your view of

- (i) the desirability of this approach, and
- (ii) the likelihood that it will be employed,

in the range of contexts given below. Tick the appropriate box.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The # column in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	# Highly desirable	# Likely to happen
All Sectors	2 Agree strongly 1 Agree 1 Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 1 No answer	2 Agree strongly 2 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly 1 No answer
Public	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree 1 Disagree strongly 5 No answer	- Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 5 No answer
Private (large)	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer
Private (SME)	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer
Not-for-profit	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer

Industry / organisation type

	#	Highly desirable	#	Likely to happen
All industries / org. types	2	Agree strongly	1	Agree strongly
	1	Agree	2	Agree
	1	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	1	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly
	1	No answer	1	No answer
Construction	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Education	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Energy, utilities and infrastructure	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Finance	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Government (incl. police, armed services)	-	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	1	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Health	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Manufacturing	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Pharmaceutical industry	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Service industries	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Other (please specify)	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer

Use of Enterprise Content Management (ECM) systems

From your perspective and experience, please indicate your view of

- (i) the desirability of this approach, and
- (ii) the likelihood that it will be employed,

in the range of contexts given below. Tick the appropriate box.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The # column in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	# Highly desirable	# Likely to happen
All Sectors	3 Agree strongly - Agree 1 Neither agree / disagree - Don't know - Disagree - Disagree strongly 2 No answer	- Agree strongly 1 Agree - Neither agree / disagree 1 Don't know - Disagree 1 Disagree strongly 3 No answer
Public	3 Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 3 No answer	- Agree strongly 4 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 2 No answer
Private (large)	2 Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer	1 Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 3 No answer
Private (SME)	- Agree strongly 1 Agree 1 Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer	- Agree strongly - Agree 1 Neither agree / disagree 1 Don't know 1 Disagree - Disagree strongly 3 No answer
Not-for-profit	- Agree strongly 2 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer	- Agree strongly 1 Agree - Neither agree / disagree - Don't know 2 Disagree - Disagree strongly 3 No answer

Industry / organisation type

	#	Highly desirable	#	Likely to happen
All industries / org. types	2	Agree strongly	-	Agree strongly
	2	Agree	2	Agree
	1	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	1	No answer	2	No answer
Construction	-	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	5	No answer
Education	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	5	No answer
Energy, utilities and infrastructure	-	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	5	No answer
Finance	-	Agree strongly	1	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	5	No answer
Government (incl. police, armed services)	1	Agree strongly	-	Agree strongly
	-	Agree	2	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	4	No answer
Health	-	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	5	No answer
Manufacturing	-	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	5	No answer
Pharmaceutical industry	-	Agree strongly	1	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	5	No answer
Service industries	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	5	No answer
Other (please specify)	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer

Some combination of the previously listed approaches

From your perspective and experience, please indicate your view of

- (i) the desirability of this approach, and
- (ii) the likelihood that it will be employed,

in the range of contexts given below. Tick the appropriate box.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The # column in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	# Highly desirable	# Likely to happen
All Sectors	3 Agree strongly 1 Agree 1 Neither agree / disagree - Don't know - Disagree - Disagree strongly 1 No answer	3 Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 2 No answer
Public	- Agree strongly - Agree 1 Neither agree / disagree - Don't know - Disagree - Disagree strongly 5 No answer	1 Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 4 No answer
Private (large)	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	1 Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 5 No answer
Private (SME)	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 5 No answer
Not-for-profit	- Agree strongly - Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly 1 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly 5 No answer

Industry / organisation type

	#	Highly desirable	#	Likely to happen
All industries / org. types	3	Agree strongly	2	Agree strongly
	1	Agree	3	Agree
	1	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	1	No answer	1	No answer
Construction	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Education	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Energy, utilities and infrastructure	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Finance	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Government (incl. police, armed services)	-	Agree strongly	-	Agree strongly
	-	Agree	1	Agree
	1	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	5	No answer	5	No answer
Health	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Manufacturing	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Pharmaceutical industry	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Service industries	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer
Other (please specify)	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer

Question

From your perspective and experience, please indicate whether this trade-off is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	4	1	-	-	1
Public	1	-	-	-	5
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	3	1	-	-	2
Construction	-	1	-	-	5
Education	1	-	-	-	5
Energy, utilities and infrastructure	-	1	-	-	5
Finance	-	1	-	-	5
Government (incl. police, armed services)	2	-	-	-	4
Health	1	-	-	-	5
Manufacturing	-	1	-	-	5
Pharmaceutical industry	-	1	-	-	5
Service industries	1	-	-	-	5
Other (please specify)	-	-	-	-	6

Question

From your perspective and experience, please indicate whether this trade-off is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	5	-	-	1
Public	-	1	-	-	5
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	4	-	-	2
Construction	1	-	-	-	5
Education	-	1	-	-	5
Energy, utilities and infrastructure	1	-	-	-	5
Finance	1	-	-	-	5
Government (incl. police, armed services)	-	2	-	-	4
Health	-	1	-	-	5
Manufacturing	1	-	-	-	5
Pharmaceutical industry	1	-	-	-	5
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Question

From your perspective and experience, please indicate whether this trade-off is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	2	1	1	-	2
Public	-	2	-	-	4
Private (large)	-	1	-	-	5
Private (SME)	-	-	1	-	5
Not-for-profit	-	-	1	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	2	2	1	-	2
Construction	-	-	-	-	6
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	1	-	-	5
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Question

From your perspective and experience, please indicate whether this trade-off is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	3	1	-	1
Public	-	1	-	-	5
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	3	1	-	1
Construction	-	-	-	-	6
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	1	-	-	5
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Question

From your perspective and experience, please indicate whether this trade-off is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	2	1	1	-	2
Public	-	2	-	-	4
Private (large)	1	-	-	-	5
Private (SME)	1	-	-	-	5
Not-for-profit	-	-	-	1	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	2	1	1	-	2
Construction	1	-	-	-	5
Education	1	-	-	-	5
Energy, utilities and infrastructure	-	-	1	-	5
Finance	1	-	-	-	5
Government (incl. police, armed services)	-	2	-	-	4
Health	-	1	-	-	5
Manufacturing	1	-	-	-	5
Pharmaceutical industry	-	1	-	-	5
Service industries	1	-	-	-	5
Other (please specify)	-	-	-	-	6

Question

From your perspective and experience, please indicate whether this trade-off is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	2	1	-	2
Public	2	-	-	-	4
Private (large)	-	1	-	-	5
Private (SME)	-	1	-	-	5
Not-for-profit	-	1	-	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	2	1	-	2
Construction	-	1	-	-	5
Education	-	1	-	-	5
Energy, utilities and infrastructure	-	-	-	1	5
Finance	-	1	-	-	5
Government (incl. police, armed services)	1	1	-	-	4
Health	1	-	-	-	5
Manufacturing	-	1	-	-	5
Pharmaceutical industry	-	1	-	-	5
Service industries	-	1	-	-	5
Other (please specify)	-	-	-	-	6

Issue 2: Strategic trade-offs and prioritisation

2.07—Prioritise initial hard cost over everything else

Question

From your perspective and experience, please indicate whether this trade-off is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	3	-	1	2
Public	-	2	-	-	4
Private (large)	-	1	-	-	5
Private (SME)	1	-	-	-	5
Not-for-profit	1	-	-	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	4	-	1	1
Construction	-	-	-	-	6
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	1	-	-	5
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Question

From your perspective and experience, please indicate whether this trade-off is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	3	-	1	2
Public	-	2	-	-	4
Private (large)	-	1	-	-	5
Private (SME)	1	-	-	-	5
Not-for-profit	1	-	-	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	4	-	1	1
Construction	-	-	-	-	6
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	1	-	-	5
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Question

From your perspective and experience, please indicate whether this trade-off is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	3	-	-	2
Public	1	1	-	-	4
Private (large)	-	-	1	-	5
Private (SME)	-	-	1	-	5
Not-for-profit	-	-	1	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	3	-	-	2
Construction	-	-	1	-	5
Education	-	-	1	-	5
Energy, utilities and infrastructure	-	-	1	-	5
Finance	-	-	1	-	5
Government (incl. police, armed services)	1	1	-	-	4
Health	1	-	-	-	5
Manufacturing	-	-	1	-	5
Pharmaceutical industry	-	-	1	-	5
Service industries	-	-	1	-	5
Other (please specify)	-	-	-	-	6

Certification of Electronic Document and Records Management Systems

From your perspective and experience, please indicate whether you agree with the following statements.

Breakdown of responses

The # column in the table below indicates the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

#	Response
1	Agree strongly
3	Agree
2	Neither agree / disagree
-	Don't know
-	Disagree
-	Disagree strongly
-	No answer

“EDRMS that comply with certification regimes (e.g. TNA/PRO, DoD, MoReq) are better than those that do not”

“EDRMS that comply with certification regimes (e.g. TNA/PRO, DoD, MoReq) are perceived to be better than those that do not”

4	Agree strongly
2	Agree
-	Neither agree / disagree
-	Don't know
-	Disagree
-	Disagree strongly
-	No answer

Systems compatibility in EDRMS implementations

From your perspective and experience, please indicate whether and to what extent you agree that EDRMS implementations are adversely affected by the following issues.

Breakdown of responses

The # column in the table below indicates the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

	# Often	# Sometimes	# Rarely	# Never
Incompatibilities between information architectures	2 Agree strongly 1 Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 3 No answer	1 Agree strongly 1 Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 4 No answer	- Agree strongly 1 Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 5 No answer	- Agree strongly - Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 6 No answer
Incompatibilities between hardware environments	1 Agree strongly 1 Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 4 No answer	1 Agree strongly - Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 5 No answer	1 Agree strongly 2 Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 3 No answer	- Agree strongly - Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 6 No answer
Incompatibilities between software environments	3 Agree strongly - Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 3 No answer	- Agree strongly 3 Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 3 No answer	- Agree strongly - Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 6 No answer	- Agree strongly - Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 6 No answer
Incompatibilities between software versions	3 Agree strongly 1 Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 2 No answer	- Agree strongly 1 Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 5 No answer	- Agree strongly 1 Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 5 No answer	- Agree strongly - Agree - Neither agr / disagr - Don't know - Disagree - Disagree strongly 6 No answer

Customisation of existing platforms / systems / applications

From your perspective and experience, please indicate your view on the desirability, feasibility and impact of carrying out e-records management through customising certain specific aspects of existing platforms / systems / applications.

Breakdown of responses

The # column in the table below indicates the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

	#	Highly desirable	#	Definitely feasible	#	High impact
Folder / file structure (e.g. in MS Windows, Outlook)	3	Agree strongly	1	Agree strongly	1	Agree strongly
	1	Agree	4	Agree	3	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	2	Disagree	1	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Document templates (metadata only)	3	Agree strongly	2	Agree strongly	1	Agree strongly
	3	Agree	4	Agree	5	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	-	Disagree	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Document templates (metadata and content)	2	Agree strongly	1	Agree strongly	2	Agree strongly
	4	Agree	5	Agree	4	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	-	Disagree	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Custom views (e.g. in MS Outlook)	-	Agree strongly	1	Agree strongly	2	Agree strongly
	5	Agree	4	Agree	3	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know	1	Don't know
	1	Disagree	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Version control	3	Agree strongly	1	Agree strongly	1	Agree strongly
	1	Agree	3	Agree	3	Agree
	1	Neither agree / disagree	-	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	1	Don't know	-	Don't know
	1	Disagree	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Security / access	2	Agree strongly	1	Agree strongly	1	Agree strongly
	1	Agree	3	Agree	2	Agree
	1	Neither agree / disagree	-	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	2	Disagree	2	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer

Information architecture / strategy

From your perspective and experience, please indicate your view on the desirability, feasibility and impact of taking the following approaches.

Breakdown of responses

The # column in the table below indicates the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

		Highly desirable		Definitely feasible		High impact
Common taxonomy and metadata fields for all systems in an organisation	3	Agree strongly	1	Agree strongly	2	Agree strongly
	3	Agree	4	Agree	3	Agree
	-	Neither agree / disagree	1	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	-	Disagree	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Exploitation of XML to enhance interoperability	1	Agree strongly	-	Agree strongly	-	Agree strongly
	4	Agree	5	Agree	4	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	1	Disagree	1	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
EDRMS front end with EDRMS back end	-	Agree strongly	1	Agree strongly	1	Agree strongly
	2	Agree	4	Agree	2	Agree
	1	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	1	Don't know	-	Don't know	-	Don't know
	2	Disagree	-	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	1	No answer	1	No answer
Non-EDRMS front end (any) with EDRMS back end	-	Agree strongly	1	Agree strongly	1	Agree strongly
	3	Agree	4	Agree	2	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	2	Don't know	-	Don't know	1	Don't know
	1	Disagree	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	1	No answer	1	No answer
Line of business system front end with EDRMS back end	3	Agree strongly	-	Agree strongly	1	Agree strongly
	3	Agree	6	Agree	5	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	-	Disagree	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Office system front end with EDRMS back end	2	Agree strongly	-	Agree strongly	2	Agree strongly
	4	Agree	6	Agree	4	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	-	Disagree	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
SharePoint front end with EDRMS back end	1	Agree strongly	1	Agree strongly	1	Agree strongly
	3	Agree	4	Agree	4	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	2	Disagree	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Other specific front end option (please specify below) with EDRMS back end	-	Agree strongly	1†	Agree strongly	-	Agree strongly
	2*†	Agree	-	Agree	1†	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1*	Don't know	1*	Don't know
	-	Disagree	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	4	No answer	4	No answer	4	No answer

* Web 2.0 technologies

† Documentum CentreStage (1)

Attributes of Electronic Document and Records Management Systems

From your perspective and experience, please rank the following attributes of EDRMS in order of importance (1 = most important, 6 = least important).

Breakdown of responses

The numbers in the table below indicates the number of respondents assigning the given rank to each attribute.

Number of participants polled: 31 Responses: 6

Ranking	(1)	(2)	(3)	(4)	(5)	(6)
Configurability	-	1	2	-	-	4
Functionality	2	2	-	2	-	1
Integration / interoperability with other systems	1	2	-	2	1	1
Interface	-	-	2	-	3	-
Scalability	-	1	2	-	2	-
Usability	3	-	-	2	-	-

User experience / acceptance

From your own perspective / experience, please indicate the extent to which you agree that the following attributes of EDRMS have a negative impact on user experience and acceptance.

Breakdown of responses

The # column in the table below indicates the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

	#	Negative impact
Poor configurability	1	Agree strongly
	4	Agree
	1	Neither agree / disagree
	-	Don't know
	-	Disagree
	-	Disagree strongly
	-	No answer
Poor functionality	2	Agree strongly
	2	Agree
	1	Neither agree / disagree
	-	Don't know
	1	Disagree
	-	Disagree strongly
	-	No answer
Poor integration / interoperability with other systems	1	Agree strongly
	4	Agree
	-	Neither agree / disagree
	-	Don't know
	1	Disagree
	-	Disagree strongly
	-	No answer
User-unfriendly interface	5	Agree strongly
	1	Agree
	-	Neither agree / disagree
	-	Don't know
	-	Disagree
	-	Disagree strongly
	-	No answer
Unfamiliar interface	-	Agree strongly
	4	Agree
	1	Neither agree / disagree
	-	Don't know
	1	Disagree
	-	Disagree strongly
	-	No answer
Poor usability	5	Agree strongly
	1	Agree
	-	Neither agree / disagree
	-	Don't know
	-	Disagree
	-	Disagree strongly
	-	No answer

User experience / acceptance

Please indicate the extent to which you agree with the following statements.

Breakdown of responses

The # column in the table below indicates the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

	#	Extent of agreement
“Records management processes should be invisible to users”	1	Agree strongly
	3	Agree
	-	Neither agree / disagree
	-	Don't know
	2	Disagree
	-	Disagree strongly
	-	No answer
“An EDRMS should be invisible to users”	1	Agree strongly
	-	Agree
	1	Neither agree / disagree
	-	Don't know
	3	Disagree
	1	Disagree strongly
	-	No answer

Automation of records management (RM) processes

From your perspective and experience, please indicate your views on automating the following selection of RM processes.

Breakdown of responses

The # column in the table below indicates the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

	#	Highly desirable	#	Definitely feasible	#	High impact
Appraisal	3	Agree strongly	1	Agree strongly	-	Agree strongly
	-	Agree	3	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	1	Don't know	1	Don't know
	3	Disagree	1	Disagree	3	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Ingest	2	Agree strongly	-	Agree strongly	1	Agree strongly
	2	Agree	4	Agree	2	Agree
	-	Neither agree / disagree	1	Neither agree / disagree	2	Neither agree / disagree
	1	Don't know	1	Don't know	1	Don't know
	1	Disagree	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Metadata capture	4	Agree strongly	2	Agree strongly	2	Agree strongly
	2	Agree	3	Agree	3	Agree
	-	Neither agree / disagree	1	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	-	Disagree	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Classification / categorisation	3	Agree strongly	1	Agree strongly	1	Agree strongly
	2	Agree	3	Agree	2	Agree
	-	Neither agree / disagree	2	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	1	Don't know
	1	Disagree	-	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Disposition	2	Agree strongly	2	Agree strongly	1	Agree strongly
	-	Agree	3	Agree	3	Agree
	1	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	2	Disagree	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	1	No answer	1	No answer	1	No answer
Population of file-plan / filing	2	Agree strongly	1	Agree strongly	1	Agree strongly
	2	Agree	3	Agree	2	Agree
	1	Neither agree / disagree	2	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know	1	Don't know
	1	Disagree	-	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Records declaration	4	Agree strongly	1	Agree strongly	1	Agree strongly
	-	Agree	5	Agree	1	Agree
	-	Neither agree / disagree	-	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	-	Don't know	-	Don't know
	2	Disagree	-	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly	1	Disagree strongly
	-	No answer	-	No answer	-	No answer
Destruction	2	Agree strongly	-	Agree strongly	1	Agree strongly
	2	Agree	4	Agree	4	Agree
	1	Neither agree / disagree	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know	-	Don't know
	1	Disagree	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer
Refreshing to newer hardware / software versions	2	Agree strongly	-	Agree strongly	1	Agree strongly
	2	Agree	4	Agree	3	Agree
	1	Neither agree / disagree	1	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	1	Don't know	-	Don't know
	1	Disagree	-	Disagree	2	Disagree
	-	Disagree strongly	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer	-	No answer

5.01—Do nothing

Do nothing

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	5	-	-	1
Public	1	-	-	-	5
Private (large)	-	1	-	-	5
Private (SME)	-	1	-	-	5
Not-for-profit	-	-	1	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	5	-	-	1
Construction	1	-	-	-	5
Education	1	-	-	-	5
Energy, utilities and infrastructure	-	1	-	-	5
Finance	-	1	-	-	5
Government (incl. police, armed services)	-	1	-	-	5
Health	-	1	-	-	5
Manufacturing	1	-	-	-	5
Pharmaceutical industry	-	1	-	-	5
Service industries	1	-	-	-	5
Other (please specify)	-	-	-	-	6

5.02—Do anything rather than nothing

Do anything rather than nothing

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	4	1	-	-	1
Public	-	1	-	-	5
Private (large)	1	-	-	-	5
Private (SME)	1	-	-	-	5
Not-for-profit	-	-	1	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	4	2	-	-	-
Construction	-	1	-	-	5
Education	-	1	-	-	5
Energy, utilities and infrastructure	-	1	-	-	5
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	-	-	-	6
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Unlimited storage plus search

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	6	-	-	-
Public	-	-	-	-	6
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	6	-	-	-
Construction	1	-	-	-	5
Education	-	1	-	-	5
Energy, utilities and infrastructure	1	-	-	-	5
Finance	-	1	-	-	5
Government (incl. police, armed services)	-	1	-	-	5
Health	1	-	-	-	5
Manufacturing	-	1	-	-	5
Pharmaceutical industry	1	-	-	-	5
Service industries	-	1	-	-	5
Other (please specify)	-	-	-	-	6

Automatically delete all emails from email systems after a fixed period

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	2	4	-	-	-
Public	-	-	-	-	6
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	2	4	-	-	-
Construction	1	-	-	-	5
Education	1	-	-	-	5
Energy, utilities and infrastructure	1	-	-	-	5
Finance	1	-	-	-	5
Government (incl. police, armed services)	-	1	-	-	5
Health	1	-	-	-	5
Manufacturing	1	-	-	-	5
Pharmaceutical industry	1	-	-	-	5
Service industries	1	-	-	-	5
Other (please specify)	-	-	-	-	6

Manage email as records

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.
 If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.
 Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	5	1	-	-	-
Public	-	-	-	-	6
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	5	1	-	-	-
Construction	-	-	-	-	6
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	-	-	-	6
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

5.06—Other (please specify)

Other (please specify)

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	3*†×	-	-	-	3
Public	1♦	-	-	-	5
Private (large)	1♦	-	-	-	5
Private (SME)	-	-	1♦	-	5
Not-for-profit	-	-	1♦	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	3*†×	-	-	-	3
Construction	-	-	1♦	-	5
Education	1♦	-	-	-	5
Energy, utilities and infrastructure	-	-	1♦	-	5
Finance	1♦	-	-	-	5
Government (incl. police, armed services)	1♦	-	-	-	5
Health	1♦	-	-	-	5
Manufacturing	-	-	1♦	-	5
Pharmaceutical industry	1♦	-	-	-	5
Service industries	-	-	1♦	-	5
Other (please specify)	-	-	-	-	6

* Intelligent Search (like Autonomy) and Restriction of Duplicate Content

† Integrated functionality and process between e-mail system and EDRMS

× integrate email archiving with EDRM and take holistic approach

♦ This needs a mixture of education, mail box size limits and encouraging users to store content of emails in a different place and store attachments in a different place. People will learn to manage it (with guidance) if you strict about mailbox sizes.

eMail management techniques

From your perspective and experience, please indicate your views on the desirability and feasibility of the following selection of email management techniques

Breakdown of responses

The # column in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

	#	Highly desirable	#	Definitely feasible
Save important / required mails on shared drives, e.g. in .msg format	1	Agree strongly	2	Agree strongly
	4	Agree	3	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	1	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer
Store/archive important/required emails in paper format	-	Agree strongly	1	Agree strongly
	-	Agree	4	Agree
	1	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	4	Disagree	1	Disagree
	1	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer
Save important/required emails in EDRMS	3	Agree strongly	3	Agree strongly
	3	Agree	2	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	1	Disagree
	-	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer
Use email archiving systems	-	Agree strongly	1	Agree strongly
	2	Agree	4	Agree
	1	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	-	Don't know
	2	Disagree	-	Disagree
	1	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer
Leave mails in email system and manage using system's native facilities	-	Agree strongly	1	Agree strongly
	2	Agree	2	Agree
	-	Neither agree / disagree	1	Neither agree / disagree
	-	Don't know	-	Don't know
	3	Disagree	2	Disagree
	1	Disagree strongly	-	Disagree strongly
	-	No answer	-	No answer
Other (please specify)	-	Agree strongly	-	Agree strongly
	-	Agree	-	Agree
	-	Neither agree / disagree	-	Neither agree / disagree
	-	Don't know	-	Don't know
	-	Disagree	-	Disagree
	-	Disagree strongly	-	Disagree strongly
	6	No answer	6	No answer

7.01—Too early to say what approach should be taken

Too early to say what approach should be taken

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	2	1	1	1
Public	1	-	-	-	5
Private (large)	1	-	-	-	5
Private (SME)	-	1	-	-	5
Not-for-profit	-	1	-	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	2	1	1	1
Construction	1	-	-	-	5
Education	-	1	-	-	5
Energy, utilities and infrastructure	1	-	-	-	5
Finance	1	-	-	-	5
Government (incl. police, armed services)	-	1	-	-	5
Health	-	1	-	-	5
Manufacturing	1	-	-	-	5
Pharmaceutical industry	1	-	-	-	5
Service industries	-	1	-	-	5
Other (please specify)	-	-	-	-	6

7.02—Do not use external cloud computing facilities

Do not use external cloud computing facilities

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	3	1	1	1
Public	-	1	-	-	5
Private (large)	1	-	-	-	5
Private (SME)	-	2	-	-	4
Not-for-profit	-	1	-	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	3	-	1	2
Construction	-	1	-	-	5
Education	-	1	-	-	5
Energy, utilities and infrastructure	1	-	-	-	5
Finance	1	-	-	-	5
Government (incl. police, armed services)	1	-	-	-	5
Health	1	-	-	-	5
Manufacturing	1	-	-	-	5
Pharmaceutical industry	1	-	-	-	5
Service industries	-	1	-	-	5
Other (please specify)	-	-	-	-	6

Use for administrative records only

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	2	2	1	1	-
Public	-	-	-	-	6
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	2	2	1	1	-
Construction	-	-	-	-	6
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	-	-	-	6
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Use for administrative and core business records only

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	2	2	1	-
Public	-	-	-	-	6
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	2	2	1	-
Construction	-	-	-	-	6
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	-	-	-	6
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Use for all records

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	2	2	1	-
Public	-	-	-	-	6
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	2	2	1	-
Construction	-	-	-	-	6
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	-	-	-	6
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Apply proactive approach to tackle records management issues

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	4	-	-	1	1
Public	1	-	-	-	5
Private (large)	1	-	-	-	5
Private (SME)	-	-	1	-	5
Not-for-profit	-	-	1	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	5	-	-	1	-
Construction	1	-	-	-	5
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	-	-	-	6
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Apply reactive approach to tackle records management issues

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.
 If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.
 Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	5	-	1	-
Public	-	-	-	-	6
Private (large)	-	-	-	-	6
Private (SME)	-	-	-	-	6
Not-for-profit	-	-	-	-	6

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	5	-	1	-
Construction	-	-	-	-	6
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	-	-	-	6
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

7.08—Do not apply records management to the cloud

Do not apply records management to the cloud

From your perspective and experience, please indicate whether this approach is advisable in the range of contexts given below.
 If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Breakdown of responses

The numbers in the tables below indicate the number of respondents choosing the given option.
 Number of participants polled: 31 Responses: 6

Sector

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	-	4	-	1	1
Public	1	-	-	-	5
Private (large)	1	-	-	-	5
Private (SME)	-	-	1	-	5
Not-for-profit	-	-	1	-	5

Industry / organisation type

	Advisable	Not advisable	No preference	Don't know	No answer
ALL	1	4	-	1	-
Construction	1	-	-	-	5
Education	-	-	-	-	6
Energy, utilities and infrastructure	-	-	-	-	6
Finance	-	-	-	-	6
Government (incl. police, armed services)	-	-	-	-	6
Health	-	-	-	-	6
Manufacturing	-	-	-	-	6
Pharmaceutical industry	-	-	-	-	6
Service industries	-	-	-	-	6
Other (please specify)	-	-	-	-	6

Documentum

From your perspective and experience, please indicate whether you agree or disagree with the following evaluations of product attributes.

n.b. In discussing issues and suggesting solutions, the respondents gave the names of IT systems / products, techniques, specifications / protocols, etc. as illustrative examples, where applicable. These examples were **not** offered as comprehensive or exhaustive critiques of the product in question.

Breakdown of responses

The # column in the tables below indicates the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

	#	Response		#	Response
Architecture (open)	-	Agree strongly	Scalability (excellent)	-	Agree strongly
	2	Agree		4	Agree
	1	Neither agree / disagree		-	Neither agree / disagree
	2	Don't know		1	Don't know
	-	Disagree		-	Disagree
	-	Disagree strongly		-	Disagree strongly
	1	No answer		1	No answer
Approach (modular)	-	Agree strongly	Resilience (excellent)	-	Agree strongly
	3	Agree		4	Agree
	-	Neither agree / disagree		-	Neither agree / disagree
	2	Don't know		1	Don't know
	-	Disagree		-	Disagree
	-	Disagree strongly		-	Disagree strongly
	1	No answer		1	No answer
Functionality (overkill)	-	Agree strongly	BPM capability (good)	-	Agree strongly
	2	Agree		4	Agree
	-	Neither agree / disagree		-	Neither agree / disagree
	1	Don't know		1	Don't know
	2	Disagree		-	Disagree
	-	Disagree strongly		-	Disagree strongly
	1	No answer		1	No answer
Complexity (too high)	-	Agree strongly	API catalogue (extensive)	-	Agree strongly
	3	Agree		4	Agree
	-	Neither agree / disagree		-	Neither agree / disagree
	1	Don't know		1	Don't know
	1	Disagree		-	Disagree
	-	Disagree strongly		-	Disagree strongly
	1	No answer		1	No answer
Usability (poor)	-	Agree strongly	For use in highly regulated environment	-	Agree strongly
	1	Agree		1	Agree
	-	Neither agree / disagree		1	Neither agree / disagree
	1	Don't know		1	Don't know
	2	Disagree		2	Disagree
	-	Disagree strongly		-	Disagree strongly
	1	No answer		1	No answer
Configuration (excellent)	-	Agree strongly	Not for average user	-	Agree strongly
	3	Agree		1	Agree
	-	Neither agree / disagree		-	Neither agree / disagree
	1	Don't know		1	Don't know
	1	Disagree		3	Disagree
	-	Disagree strongly		-	Disagree strongly
	1	No answer		1	No answer

Question

Are there any further 'pros' and 'cons' of this product that you wish to note?

Response

#

Sound underlying technology, good foundation, some inconsistency and end user elements cause issues 1

Question

From your perspective and experience, please indicate whether you agree or disagree that the product is well suited for use in specific sectors

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

	#	Suited for use
All Sectors	-	Agree strongly
	2	Agree
	-	Neither agree / disagree
	2	Don't know
	-	Disagree
	-	Disagree strongly
	2	No answer
Public	-	Agree strongly
	1	Agree
	-	Neither agree / disagree
	-	Don't know
	2	Disagree
	-	Disagree strongly
	3	No answer
Private (large)	-	Agree strongly
	3	Agree
	-	Neither agree / disagree
	-	Don't know
	-	Disagree
	-	Disagree strongly
	3	No answer
Private (SME)	-	Agree strongly
	-	Agree
	-	Neither agree / disagree
	-	Don't know
	2	Disagree
	-	Disagree strongly
	4	No answer
Not-for-profit	-	Agree strongly
	-	Agree
	-	Neither agree / disagree
	-	Don't know
	2	Disagree
	-	Disagree strongly
	4	No answer

LiveLink

From your perspective and experience, please indicate whether you agree or disagree with the following evaluations of product attributes.

n.b. In discussing issues and suggesting solutions, the respondents gave the names of IT systems / products, techniques, specifications / protocols, etc. as illustrative examples, where applicable. These examples were **not** offered as comprehensive or exhaustive critiques of the product in question.

Breakdown of responses

The # column in the tables below indicates the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

	#	Response
Integration with office systems (good)	-	Agree strongly
	5	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	-	No answer
Functionality / usability balance (right)	-	Agree strongly
	4	Agree
	-	Neither agree / disagree
	1	Don't know
	1	Disagree
	-	Disagree strongly
	-	No answer
User interface (good)	-	Agree strongly
	5	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	-	No answer

Question

Are there any further 'pros' and 'cons' of this product that you wish to note?

Response

#

Con - What is now livelink is an amalgamation of numerous converged technologies from previous companies (PC DOCS, Hummingbird, Red Dot etc) Sometimes migration becomes a problem if moving to a newer version e.g. moving from PCDOCS to Hummingbird was a struggle. Moving again from Hummingbird to eDocs is a challenge. All these times when one company takes over another there is no guarantee the system engineers of the old company will be kept.

1

Not as integrated as it could be

1

Complex to implement. UK RM focus needs work

1

Some functionality limits e.g. minor versioning

1

Question

From your perspective and experience, please indicate whether you agree or disagree that the product is well suited for use in specific sectors

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

	#	Suited for use
All Sectors	-	Agree strongly
	4	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	1	No answer
Public	-	Agree strongly
	2	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	3	No answer
Private (large)	-	Agree strongly
	2	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	3	No answer
Private (SME)	-	Agree strongly
	1	Agree
	-	Neither agree / disagree
	1	Don't know
	1	Disagree
	-	Disagree strongly
	3	No answer
Not-for-profit	-	Agree strongly
	1	Agree
	-	Neither agree / disagree
	1	Don't know
	1	Disagree
	-	Disagree strongly
	3	No answer

Meridio

From your perspective and experience, please indicate whether you agree or disagree with the following evaluations of product attributes.

n.b. In discussing issues and suggesting solutions, the respondents gave the names of IT systems / products, techniques, specifications / protocols, etc. as illustrative examples, where applicable. These examples were **not** offered as comprehensive or exhaustive critiques of the product in question.

Breakdown of responses

The # column in the tables below indicates the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

	#	Response		#	Response
Compliance with e-government standards	-	Agree strongly	Integration with SharePoint (superfluous, as Meridio already has good desktop integration)	-	Agree strongly
	3	Agree		1	Agree
	-	Neither agree / disagree		1	Neither agree / disagree
	3	Don't know		3	Don't know
	-	Disagree		1	Disagree
	-	Disagree strongly		-	Disagree strongly
	-	No answer		-	No answer
Functionality / usability balance (right)	-	Agree strongly	Integration with SharePoint (works well)	-	Agree strongly
	3	Agree		3	Agree
	-	Neither agree / disagree		-	Neither agree / disagree
	3	Don't know		3	Don't know
	-	Disagree		-	Disagree
	-	Disagree strongly		-	Disagree strongly
	-	No answer		-	No answer
User interface (good)	-	Agree strongly	Scalability (excellent)	-	Agree strongly
	2	Agree		2	Agree
	-	Neither agree / disagree		1	Neither agree / disagree
	3	Don't know		3	Don't know
	1	Disagree		-	Disagree
	-	Disagree strongly		-	Disagree strongly
	-	No answer		-	No answer
Integration with office systems (excellent)	-	Agree strongly	Merger with Autonomy provides additional capabilities	-	Agree strongly
	1	Agree		3	Agree
	1	Neither agree / disagree		-	Neither agree / disagree
	3	Don't know		3	Don't know
	1	Disagree		-	Disagree
	-	Disagree strongly		-	Disagree strongly
	-	No answer		-	No answer

Question

Are there any further 'pros' and 'cons' of this product that you wish to note?

Response

	#
Benefits of Autonomy search	1
SharePoint integration requires client effort to develop ubiquitous business EDM processes	1
Built around TNA spec – and therefore meets that need. Good SharePoint integration. Needs third party workflow	1
Limits in versioning functionality	1
Interesting integration with Autonomy IDOL for categorisation and lifecycle management	1

Question

From your perspective and experience, please indicate whether you agree or disagree that the product is well suited for use in specific sectors

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

	#	Suited for use
All Sectors	-	Agree strongly
	3	Agree
	-	Neither agree / disagree
	3	Don't know
	-	Disagree
	-	Disagree strongly
	-	No answer
<hr/>		
Public	-	Agree strongly
	1	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	4	No answer
<hr/>		
Private (large)	-	Agree strongly
	1	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	4	No answer
<hr/>		
Private (SME)	-	Agree strongly
	1	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	4	No answer
<hr/>		
Not-for-profit	-	Agree strongly
	1	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	4	No answer

SharePoint (as EDRMS)

From your perspective and experience, please indicate whether you agree or disagree with the following evaluations of product attributes.

n.b. In discussing issues and suggesting solutions, the respondents gave the names of IT systems / products, techniques, specifications / protocols, etc. as illustrative examples, where applicable. These examples were **not** offered as comprehensive or exhaustive critiques of the product in question.

Breakdown of responses

The # column in the tables below indicates the number of respondents choosing the given option.

Number of participants polled: 31 Responses: 6

	#	Response
Architecture (inflexible)		<ul style="list-style-type: none"> - Agree strongly 6 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly - No answer
Functionality (poor)		<ul style="list-style-type: none"> - Agree strongly 5 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly - No answer
Integration with Microsoft environment (good)		<ul style="list-style-type: none"> - Agree strongly 5 Agree - Neither agree / disagree - Don't know 1 Disagree - Disagree strongly - No answer
Integration with non-Microsoft environment (poor)		<ul style="list-style-type: none"> - Agree strongly 4 Agree 2 Neither agree / disagree - Don't know - Disagree - Disagree strongly - No answer
Significant customisation required		<ul style="list-style-type: none"> - Agree strongly 6 Agree - Neither agree / disagree - Don't know - Disagree - Disagree strongly - No answer

Question

Are there any further 'pros' and 'cons' of this product that you wish to note?

Response

	#
Lacking effective RM bolt-on – even years after Microsoft tried to build DOD compliant module	1
Doesn't work well with non-Microsoft products e.g. Firefox	1
Very lightweight and requires much deeper functionality	1
Good as basic content store – but most people want more. However good price/performance, good Office integration	1
Needs vast customising overhead, otherwise can lack any control in number of size of document libraries	1
Best seen as integration – but capable of enterprise integration if requirements match or can be adjusted to match	1

Question

From your perspective and experience, please indicate whether you agree or disagree that the product is well suited for use in specific sectors

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

	#	Suited for use
All Sectors	-	Agree strongly
	1	Agree
	-	Neither agree / disagree
	-	Don't know
	4	Disagree
	-	Disagree strongly
	1	No answer
<hr/>		
Public	-	Agree strongly
	-	Agree
	-	Neither agree / disagree
	-	Don't know
	2	Disagree
	-	Disagree strongly
	4	No answer
<hr/>		
Private (large)	-	Agree strongly
	1	Agree
	1	Neither agree / disagree
	-	Don't know
	-	Disagree
	-	Disagree strongly
	4	No answer
<hr/>		
Private (SME)	-	Agree strongly
	2	Agree
	-	Neither agree / disagree
	-	Don't know
	-	Disagree
	-	Disagree strongly
	4	No answer
<hr/>		
Not-for-profit	-	Agree strongly
	2	Agree
	-	Neither agree / disagree
	-	Don't know
	-	Disagree
	-	Disagree strongly
	4	No answer

SharePoint (as front end to EDRMS)

From your perspective and experience, please indicate whether you agree or disagree with the following evaluations of product attributes.

n.b. In discussing issues and suggesting solutions, the respondents gave the names of IT systems / products, techniques, specifications / protocols, etc. as illustrative examples, where applicable. These examples were **not** offered as comprehensive or exhaustive critiques of the product in question.

Breakdown of responses

The # column in the tables below indicates the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

	#	Response		#	Response
Cheap solution	-	Agree strongly	Portal (good)	-	Agree strongly
	1	Agree		3	Agree
	1	Neither agree / disagree		1	Neither agree / disagree
	2	Don't know		2	Don't know
	2	Disagree		-	Disagree
	-	Disagree strongly		-	Disagree strongly
	-	No answer		-	No answer
Information architecture (poor)	-	Agree strongly	Workflow capability (good)	-	Agree strongly
	4	Agree		3	Agree
	-	Neither agree / disagree		-	Neither agree / disagree
	2	Don't know		2	Don't know
	-	Disagree		1	Disagree
	-	Disagree strongly		-	Disagree strongly
	-	No answer		-	No answer
RM/DM capability (good)	-	Agree strongly	Scalability (poor)	-	Agree strongly
	1	Agree		3	Agree
	-	Neither agree / disagree		-	Neither agree / disagree
	2	Don't know		2	Don't know
	3	Disagree		1	Disagree
	-	Disagree strongly		-	Disagree strongly
	-	No answer		-	No answer
Search (good)	-	Agree strongly	Integration with IT systems (poor)	-	Agree strongly
	2	Agree		3	Agree
	1	Neither agree / disagree		1	Neither agree / disagree
	2	Don't know		1	Don't know
	1	Disagree		1	Disagree
	-	Disagree strongly		-	Disagree strongly
	-	No answer		-	No answer

Question

Are there any further 'pros' and 'cons' of this product that you wish to note?

Response

#

Good solution when integrated - and weaknesses can be passed to other element - can address poor info architecture if it is working within overall solution

1

Search is OK rather than poor. Workflow really expects development or 3rd party add-on - the question not really appropriate

1

Question

From your perspective and experience, please indicate whether you agree or disagree that the product is well suited for use in specific sectors

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

	#	Suited for use
All Sectors	-	Agree strongly
	4	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	1	No answer
<hr/>		
Public	-	Agree strongly
	-	Agree
	-	Neither agree / disagree
	1	Don't know
	1	Disagree
	-	Disagree strongly
	4	No answer
<hr/>		
Private (large)	-	Agree strongly
	1	Agree
	-	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	4	No answer
<hr/>		
Private (SME)	-	Agree strongly
	1	Agree
	1	Neither agree / disagree
	1	Don't know
	-	Disagree
	-	Disagree strongly
	3	No answer
<hr/>		
Not-for-profit	-	Agree strongly
	-	Agree
	1	Neither agree / disagree
	1	Don't know
	1	Disagree
	-	Disagree strongly
	3	No answer

TRIM

From your perspective and experience, please indicate whether you agree or disagree with the following evaluations of product attributes.

n.b. In discussing issues and suggesting solutions, the respondents gave the names of IT systems / products, techniques, specifications / protocols, etc. as illustrative examples, where applicable. These examples were **not** offered as comprehensive or exhaustive critiques of the product in question.

Breakdown of responses

The # column in the tables below indicates the number of respondents choosing the given option.

Number of participants polled: 31

Responses: 6

	#	Response
TNA approval		<ul style="list-style-type: none"> - Agree strongly 4 Agree - Neither agree / disagree 2 Don't know - Disagree - Disagree strongly - No answer
Configuration (excellent)		<ul style="list-style-type: none"> - Agree strongly 2 Agree 1 Neither agree / disagree 3 Don't know - Disagree - Disagree strongly - No answer
Integration with office systems (good)		<ul style="list-style-type: none"> - Agree strongly 2 Agree 1 Neither agree / disagree 3 Don't know - Disagree - Disagree strongly - No answer
User interface (good)		<ul style="list-style-type: none"> - Agree strongly 3 Agree - Neither agree / disagree 3 Don't know - Disagree - Disagree strongly - No answer

Question

Are there any further 'pros' and 'cons' of this product that you wish to note?

Response

#

Understand has good Sharepoint integrator since takeover by HP, but have not actually used this yet	1
Less good for integrating	1
Configuration takes much effort – complex – almost too flexible	1

Question

From your perspective and experience, please indicate whether you agree or disagree that the product is well suited for use in specific sectors

If your response is the same for all sectors or industries, you need choose from the lists under the first line of each section only

Suited for use

All Sectors

- Agree strongly
- 3 Agree
- Neither agree / disagree
- 3 Don't know
- Disagree
- Disagree strongly
- No answer

Public

- Agree strongly
- Agree
- Neither agree / disagree
- 1 Don't know
- Disagree
- Disagree strongly
- 5 No answer

Private (large)

- Agree strongly
- Agree
- Neither agree / disagree
- 1 Don't know
- Disagree
- Disagree strongly
- 5 No answer

Private (SME)

- Agree strongly
- Agree
- Neither agree / disagree
- 1 Don't know
- Disagree
- Disagree strongly
- 5 No answer

Not-for-profit

- Agree strongly
- Agree
- Neither agree / disagree
- 1 Don't know
- Disagree
- Disagree strongly
- 5 No answer