

ECM New Customer Information Form

The following details information necessary for understanding the many areas a business unit must review in using the ECM/Imaging service. It is comprehensive and all of the questions must be considered and answered. Business units can use this document to help them fill in the actual form located here:

https://webforms.imaging.wisc.edu/restrictedhr/ecm_imaging/ecm_new_customer_info.htm

Members of the ECM team are happy to assist business units in reviewing the needed information and helping them fill out the form. If you've come by this document without context or need help, please contact us at: imaging-info@lists.wisc.edu.

Business Envelope

- Name
- Contact Phone Number
- Email address
- Position
- Division/Department
- If your Department or Division currently uses Perceptive Content/ImageNow, how is it used
- Have you read and understood the ECM/Imaging Service Terms of Use at: <https://kb.wisc.edu/ecms/page.php?id=29878>
- Have you read and understood the ECM/Imaging Service Level Agreement at: <https://kb.wisc.edu/ecms/page.php?id=29879>
- Have you read and understood Perceptive Content/ImageNow Concepts and How it Works at: <https://kb.wisc.edu/ecms/page.php?id=33110>
- If you are not the stakeholder for this effort, who is?
- Identify the person in your business unit that will be responsible for the management of your implementation details for your business unit.
- Provide the name and contact information for the IT staff member in your business unit that will be responsible for the ImageNow Client on your users workstations AND for the workstation and scanner combination.
 - Name
 - Contact Information
- Each business unit tends to identify a staff-member of their business unit as their Data Custodian. A Data Custodian has the role of approving access to their data and documents in the ECM/Imaging and making user change and access requests for their business unit's users and ECM/Imaging.
 - Who will be your data custodian?
 - Who is your backup data custodian

- Do you have your document types, retention schedule and basic preservation plan from the [UW Madison Records Office](#)?
- Request for Work Details
 - What types of documents/data do you want to manage?
 - If you have any restricted or sensitive data contained in your documents, please describe, and address whether the sensitive documents can be segregated.
 - Please identify other systems documents or data may be associated with (e.g., SFS, HRS, ISIS)
 - Is someone on campus already storing some or all of what you want to do?
 - If you are planning on sharing resources (scanner, student workers) with other business units, please describe:

Processes

- Who will need access to the documents (by document type if necessary)?
 - In your department
 - In your Division
 - Across campus
- Historical Document Management
 - What is done with documents now?
 - What isn't done with the documents now?
 - How do you identify and find the documents?
 - Can you categorize/classify the documents into similar types?
 - Identify key metadata, e.g., last name or tracking number, for all document types.

Statement of Work

- Introduction/Background
 - Identify your business need(s) to be met by Perceptive Content/ImageNow:
 - What is your business case for using Perceptive Content/ ImageNow?
 - What are your goals?
 - How does the work fit into your business unit's mission and goals?
 - Please describe your current environment and how you want that to change using ECM/Imaging Service.
- Objectives
 - What are your quantifiable objectives?
- Timeline
 - What is your timeline and why?