CGM NUMBER-REVISION: 052.00

EFFECTIVE DATE: 06/28/2007

CATEGORY: Data Management

SUBJECT: Documentum Use, Policy and Guidance

DESCRIPTION:

This CGM establishes procedures and policy for Documentum file access, maintenance and promotion.

Background:

In 2001, CESAJ IM and SFWMD IT staffs developed the hardware and software technology standards for the CERP network and storage area. The domain was named CERPZone. The need for an electronic document management system was identified. After an evaluation, the Documentum solution was selected to be the primary document retention repository. Copies of Documentum were acquired for the Jacksonville and West Palm Beach sites to allow for the collaboration and permanent storage of these documents.

Authority:

The Design Agreement between the Department of the Army (DA) and SFWMD was signed on 12 May 2000. The CERP Master Program Management Plan, Vol. I – Management Processes Comprehensive Everglades Restoration Plan 2.2.1.4 Document Management and Control subsequently specified:

“The Corps and the SFWMD will work together to develop and implement a process and protocol for tracking and documenting decisions that impact the design, design process or schedules for the Comprehensive Plan. A document management and control system will be developed and implemented for collaboration, storage and retrieval of design products, records and documents, as well as information pertaining to design costs and expenses incurred during implementation of the Comprehensive Plan.”

This document provides working level guidance to assist Project Delivery Teams in the implementation of the Comprehensive Everglades Restoration Plan (CERP) program executed between the South Florida Water Management District and the U.S. Army Corps of Engineers. The guidance does not constitute policy for either agency nor does it create authority beyond that granted to any agency member carrying out their duties. Guidance reflecting agency policy on subjects listed in the guidance memoranda section of the programmatic regulations for CERP will be issued when the final programmatic regulations are adopted, using the process stated in the regulations.
The Corps and SFWMD will develop and maintain a compatible document management and control system so that all information is readily available to both organizations with electronic posting to the shared data information network.

All Corps and SFWMD project managers will be expected to become familiar with and use the document management and control system. It is critical that all electronic and hardcopy project documents generated during the implementation of their project be preserved for the record and are accessible to others."

The Records Management authority for CERPDoc_SAJS is governed by DOD and USACE regulations. The Records Management authority for CERPDoc_WPB is governed by State of Florida statutes.

GUIDANCE:

Applicability:

Documentum will be used for development, management, and storage of word processing, spreadsheet, presentation, and cross-platform image files suited for its design, particularly those developed collaboratively or sequentially.

All significant documents related to South Florida Restoration will be managed in Documentum throughout their existence, to include:

- Official correspondence
- Decision documents
- Project development review packages (FSM, AFB)
- Real Estate documents
- Construction Documents
- Guidance
- Contract documents when stored with acceptable security
- Meeting minutes
- Finished work products
- Change Control records
- Agreements
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Promotion criteria:

WIP to Published status - When a document has been developed into final form, including signature if applicable, the document is ready to be promoted from Work In Progress (WIP) status to Published status.

Published to Archived status - When a document is published to replace an earlier published version, the superseded version will be placed in an Archived status.

Location of documents at each Life Cycle State:

CERPDoc_SAJ:
- **WIP** – The document can be stored in the owner’s personal folder (Docbase Home Cabinet) or in a Team Room folder.
- **Published** – The document is moved to the “CERP Project” cabinet/sub-folder according to its Project Name and CERP Code Properties.
- **Archived** – The document remains in the cabinet/sub-folder that it was filed under in the “Published” state.

CERPDoc_WPB:
- **WIP** – The file will be imported by the owner and placed in the final location. The owner has the ability to restrict access, if necessary. Users are able to create a new version of an existing file.
- **Published** – The files do not change location. Users do not have the right to change or version the file. The owner can promote the document to Archived when superceded.
- **Archived** – The document remains in the cabinet/sub-folder that it was filed under in the “Published” state.

Requirements for properties at each Life Cycle Document State:
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Administration of Documentum Services:

**CERPDoc-SA J** – The system will be maintained by USACE IT/IM personal under the control and guidance of the USACE CERP IT/IM manager. All upgrades, updates, and daily administration function will be performed as needed to ensure that the system is available to the end user community.

**CERPDoc-WPB** - The system will be maintained by SFWMD IT/IM personal under the control and guidance of the SFWMD CERP IT manager. All upgrades, updates and daily administration functions will be performed as needed to ensure that the system is available to the end user community.

Administration of Program, Project and Team Room Areas:

**Program and Project Areas** will be maintained by the IT Documentum Administrator(s). Requests for new areas or changes to existing areas should be submitted to a IDM Documentum Liaison who will forward it, after approval, to a IT Documentum Administrator. Email is an acceptable means of communication. Structural changes will be submitted via the CITIF process by the IDM Documentum Liaisons. Permissions will be addressed in 5.3.

**Documentum Team Rooms** have been established in the CERPZone North Docbase. A Team Room Administrator will be assigned to control membership and access to each room. Assignments will typically need to be changed due to a reassignment of the project manager of record or to delegate the administrator responsibility. The responsibility for timely notification of Team Room Administrator changes lies with the outgoing Team Room Administrator. If the outgoing administrator is unavailable to make the reassignments, the project manager of record or their supervisor (or delegate) will provide the information indicated below.

Requests for new Documentum Team Room areas or changes to existing areas should be submitted by the project manager of record, their supervisor (or designee), or a IDM Documentum Liaison. After approval, the IDM Documentum Liaison will forward to the request to the IT Documentum Administrator. Email is an acceptable means of communication. A member of the IDM Management
group may, after a significant reorganization, check the list of administrators against new organization charts and request changes directly through the IT Documentum Administrator.

All requests will contain the following:
   a) Name of the Team Room
   b) Name of the Team Room Administrator
New requests will also include:
   c) A list of initial Team Room Members and associated permissions

Team Room Membership:

Team Room Membership is controlled by the Team Room Administrator. A validated CERPZone user will contact the Project Manager to request permissions to get access to established Team Rooms. The Project Manager will direct the Team Room Administrator to create the user permissions as appropriate. It is the responsibility of both each Team Member and the Project Manager to keep the Team Room Administrator up to date on their membership so that the membership groups are current and valid.

Program, Project and Team Room Area Maintenance & Cleanup:

The Administrator, project manager, document owner, or designee will, when a significant document has been completed, complete the document’s property sheet and keyword list and then promote that document to the “Published” state.

The Administrator, project manager, or designee will, throughout his or her tenure on the project, evaluate the importance of each file and its older versions in the folder, prompting publication of completed significant documents and deleting items no longer needed and of no historical significance. The Administrator may keep old versions of significant documents for reference, or may at his or her discretion “trim” older version of published documents.

APPLICATION:

Effective immediately, this guidance applies to all projects utilizing Documentum for document management.
CERP Guidance Memorandum
South Florida Water Management District – Jacksonville District, U.S. Army Corps Of Engineers

CGM NUMBER-REVISION: 052.00

APPROVALS:

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South Florida Water Management District
DATE: 6/22/07

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