IBM Enterprise Content Management: Improving efficiency for suspense and action tracking

Highlights

- **Helps defense agencies increase visibility across disparate information sources by using a fully integrated suspense tracking system**
- **Provides rapid access to information and people and helps improve productivity**
- **Streamlines the collection, management and distribution of information to help reduce risk and help ensure timely completion of orders**
- **Helps reduce or eliminate manual processes and reliance on physical documentation**
- **Allows the convergence of data as well as unstructured information associated with suspenses or action orders**

Rapid response time and effective collaboration are mission critical to any Department of Defense (DoD) agency for daily operations or in times of conflict. Suspense tracking, also known as task order or action order management, is essential to meeting mission and operational deadlines, assuring collaboration and helping the department answer complex congressional requests or handling simple data reporting. Yet, it frequently remains one of the most challenging processes for agencies to complete authoritatively.

As defense organizations tackle today's challenges—adapt to changing operational conditions, comply with regulatory mandates and improve efficiency—they need suspense tracking systems that connect disparate locations of information, increase visibility across agencies and provide accountability to the delegating office. A flexible, scalable system for rapid deployment of applications can also provide the necessary tools for trend analysis and risk mitigation related to the overall action tracking process. As a result, the entire lifecycle of a suspense or task action order—from issuance through every step in the work process—provides operational value and reduces overall costs.

IBM solutions offer strategic advantage
As a world leader in information management, IBM provides a feature-rich, end-to-end solution that supports a successful suspense tracking

strategy. IBM® Enterprise Content Management (ECM) solutions for suspense tracking within the defense industry are DoD 5015.2 certified and Section 508 compliant in accordance with government standards for information access and processing.

These IBM ECM solutions enable agencies to rapidly build a flexible and scalable suspense or action order tracking system. By combining IBM Business Process Management, Content Management and Records Management software, agencies can realize fully integrated suspense lifecycle capabilities that can be built on a Service Oriented Architecture (SOA) infrastructure. This highly scalable technical platform enables users to easily connect, gather and share information, thereby improving productivity, response times and cross-group collaboration. It also helps agencies to improve access to legacy systems already in place, enabling better use of existing resources and information.
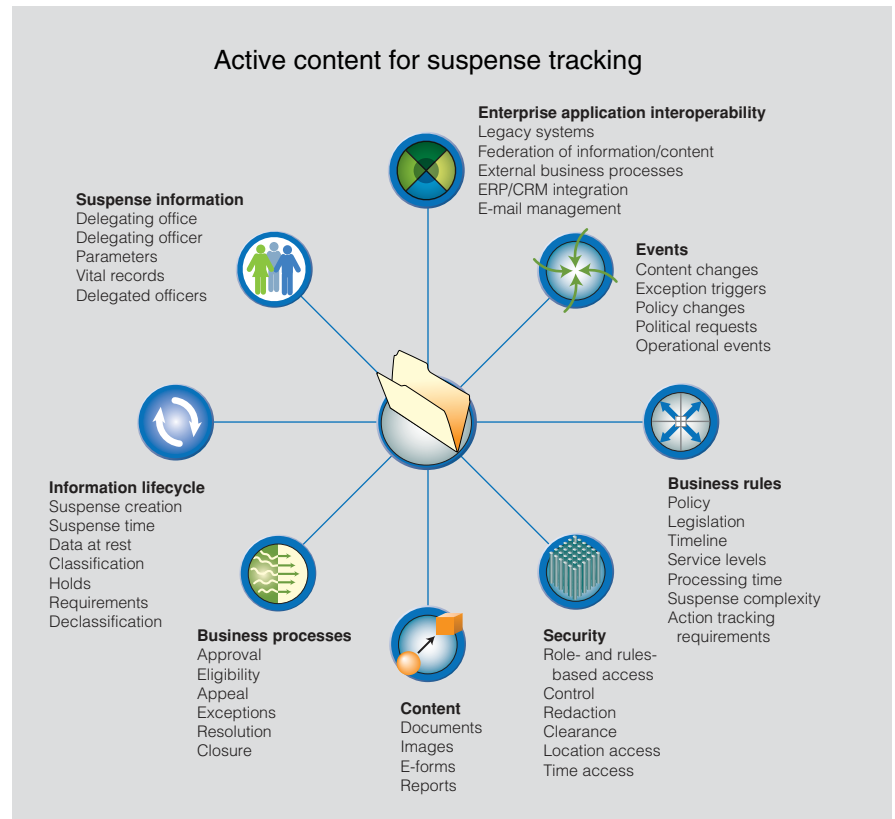
Scenario planning improves flexibility
With Business Process Management (BPM), business process scenario planning in a military environment becomes a reality by introducing the ability to strategize around engagements and manage suspense tasks or orders more effectively as circumstances change. BPM easily incorporates many processes, policies and procedures, such as preparing agencies for effective, efficient and secure multinational collaboration.

Many features, including automatic notifications to assignees, alerts, comments, progress tracking, and accept and decline functionality, allow complex processes to be mapped out intuitively to support suspense tasks and subtasks, resulting in increased responsiveness and improved compliance across the agency.

Content management helps accelerate analysis

IBM ECM brings together information and business processes to create "active content," which enhances the agency's ability to respond quickly to events, to trigger different actions, to launch different business processes or to deliver targeted content to decision makers (see Figure 1).

Figure 1. Taskers/suspenses become active based on what they do with information

Active content for suspense tracking

Enterprise application interoperability
Legacy systems
Federation of information/content
External business processes
ERP/CRM integration
E-mail management

Suspense information
Delegating office
Delegating officer
Parameters
Vital records
Delegated officers

Events
Content changes
Exception triggers
Policy changes
Political requests
Operational events

Information lifecycle
Suspense creation
Suspense time
Data at rest
Classification
Holds
Requirements
Declassification

Business rules
Policy
Legislation
Timeline
Service levels
Processing time
Suspense complexity
Action tracking
 requirements

Business processes
Approval
Eligibility
Appeal
Exceptions
Resolution
Closure

Content
Documents
Images
E-forms
Reports

Security
Role- and rules-
 based access
Control
Redaction
Clearance
Location access
Time access

Using IBM ECM, agencies can automate actions such as alerts, routing and collation that can speed analysis and production efforts. Critical information can be federated to provide a single source for content.

Records management helps ensure compliance

A solid records management capability is a key component of the IBM ECM suspense tracking solution. IBM Records Management involves the creation, storage, usage and eventual destruction of records as defined by agency rules and policy. Enforcing records management policies at the technology layer eliminates human error by removing the burden of records declaration from the individual. Records management also helps assigning offices reduce operational costs, improve productivity and mitigate risks associated with manual data entry.

Assigning offices can better meet records retention requirements and quickly respond to congressional inquiries, classification and declassification reviews and other similar events. Information can be presented in customizable reports with sensitive security data treated according to approval policy. These reports offer a deeper understanding that enables improved decision making.

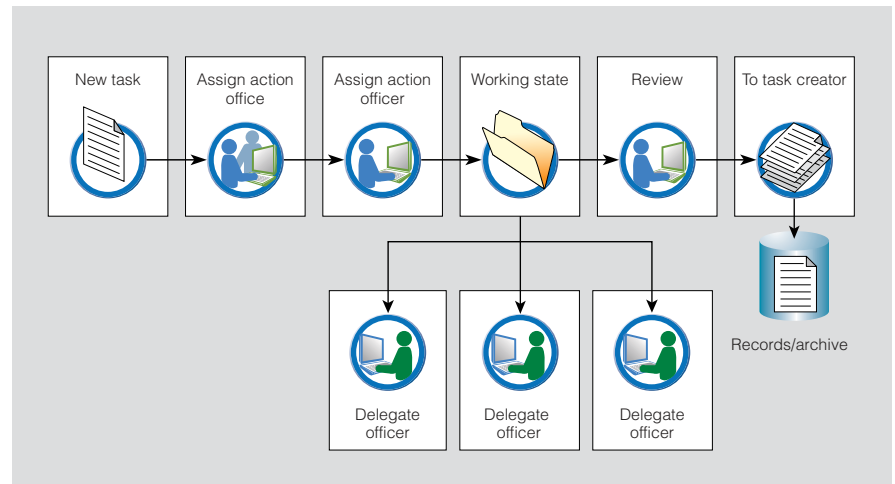**Robust framework helps lower total cost of ownership**

IBM Business Process Framework provides an application development framework to help agencies quickly develop and deploy process applications. This framework delivers a configurable suspense/action-based development environment for creating customized suspense and action tracking applications across the agency with common Web-based user-interface elements. It helps maximize component reuse, facilitates modifications and can help substantially reduce development cost, time to deployment and total cost of ownership (TCO) of such applications.

Workflow tools help ensure security

IBM Business Process Framework includes built-in work management capabilities. Work distribution is a configurable process that provides a wide range of rules such as work access, work escalation, work approval and business calendar–based handling of process timers. The suspense assignee can identify and initiate new work items and integrate late-arriving documents with ongoing processes (see Figure 2). Customizable role-based routing includes personal and collective queue access and work presentation capabilities to display the right work to the right people at the right time.

Assigning officers may delegate specific tasks to staff members based on experience, security status or regional area, or restrict certain groups from processing or approving specific types of work such as new applications, claims or invoices. This powerful and flexible role management and work distribution environment enables agencies to better load-balance work across staff, enforce policies, ensure accountability and help meet deadlines.

Figure 2. Taskers/suspenses and action tracking rely heavily on Business Process Management

Agile platform streamlines tracking processes

By implementing an IBM ECM solution for suspense tracking, defense agencies can leverage existing technologies, while consolidating on an agile platform designed for scalability. These solutions, designed to streamline underlying business processes, also provide greater visibility into the suspense or task workflow by breaking down traditional silos of information and automating the system for greater efficiency.

IBM ECM suspense tracking solutions can be Web-based or easily integrated into an existing desktop application with an intuitive, user-friendly design that helps minimize learning curves and training requirements. Without manual, labor-intensive processes, military agencies can significantly improve staff productivity, reduce risk and reduce administrative costs, providing better use of resources and funding within operations.

For more information

For more information about suspense tracking and the IBM Enterprise Content Management portfolio, please contact your IBM marketing representative or visit **ibm.com**/software/data/content-management