Draft ECM Survey – September 2011

Background:

Annually, about 70,000 items of correspondence are entered into our electronic document and records system (ECM- dataworks). To improve our customer service and the ECM system for staff, we are preparing for the upgrade to the next version of ECM (V4.02). This will include a rollout and training for staff on the new features and functionality. We would like to ask staff about the way they use the ECM system, the frequency of use and how we can tailer our training for staff.

Aim:

This survey is being conducted to gauge the usage of the ECM (Dataworks) system, to assist the Information Management team, to improve their training program as well as improving processes to ensure the data management systems is accessible and utilised by all staff across the organisation.

Your role:

We would like to hear your thoughts on the ECM system by Friday 9 September. This survey consists of 7 questions and will take no longer than five minutes to complete.

Confidentiality:

Your involvement in the survey is entirely voluntary, and the information you provide will be kept confidential. In adherence to Council policy, all materials will be kept in accordance with the Privacy Act.

Further Information:
If you would like any additional information regarding this survey, please contact:
Records Managers Name Here

Title Here

Phone Number Here

Email Address Here

# Your current ECM skills.

The following questions relate to your usage of the ECM system.

## Do you use ECM (Dataworks)?

* Yes
* No ( skip to N2)

## Y1. How often do you use ECM?

* daily
* weekly
* monthly
* quarterly
* less than quarterly

## Y2. What do you use ECM for? (please tick all that apply)

* check tasks
* register document
* register emails
* search for documents
* search for contact details
* other

please tell us if you use ECM for any other purposes.

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## Y2.a What type of document do you register in ECM?

* Incoming emails
* Incoming letters
* Outgoing email
* Outgoing letters
* Documents created ( eg policies, reports, plans etc)
* Meeting Minutes
* Other

Please specify,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Y3. Which version of ECM are you using most?

* ECM Browser
* ECM Classic
* Not sure

## Y4. For the following areas please indicate your level of confidence with…

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Actioning your Task List | **I feel confident** | **More knowledge needed** | **I don’t need to know this for my job** | **I don’t understand what this is** |
| Opening your document  | ❒ | ❒ | ❒ | ❒ |
| Adding a note | ❒ | ❒ | ❒ | ❒ |
| Using a template to respond | ❒ | ❒ | ❒ | ❒ |
| Sending an Email response | ❒ | ❒ | ❒ | ❒ |
| Attaching a reply document | ❒ | ❒ | ❒ | ❒ |
| Completing the action | ❒ | ❒ | ❒ | ❒ |

## Y5. For the following areas please indicate your level of confidence with…

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Registering an Email to ECM | **I feel confident** | **More knowledge needed** | **I don’t need to know this for my job** | **I don’t understand what this is** |
| Quick Registration | ❒ | ❒ | ❒ | ❒ |
| Register Later | ❒ | ❒ | ❒ | ❒ |
| Using the Registration Screen  | ❒ | ❒ | ❒ | ❒ |
| Filling in the Properties – what information should I enter?  | ❒ | ❒ | ❒ | ❒ |
| What should I register to ECM?  | ❒ | ❒ | ❒ | ❒ |

## Y6. For the following areas please indicate your level of confidence with…

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Registering a Word Document | **I feel confident** | **More knowledge needed** | **I don’t need to know this for my job** | **I don’t understand what this is** |
| Use of Add- Ins tab ECM Registration buttons  | ❒ | ❒ | ❒ | ❒ |
| Using the Registration Screen  | ❒ | ❒ | ❒ | ❒ |
| Filling in the Properties – what information should I enter?  | ❒ | ❒ | ❒ | ❒ |
| What should I register to ECM?  | ❒ | ❒ | ❒ | ❒ |

## Y7. For the following areas please indicate your level of confidence with…

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Searching the Indexes | **I feel confident** | **More knowledge needed** | **I don’t need to know this for my job** | **I don’t understand what this is** |
| Searching the Subject Index | ❒ | ❒ | ❒ | ❒ |
| Searching the Customer Index | ❒ | ❒ | ❒ | ❒ |
| Search other Indexes | ❒ | ❒ | ❒ | ❒ |
| Searching more than one Index (cross index searching) | ❒ | ❒ | ❒ | ❒ |
| Searching for a Document by number or précis | ❒ | ❒ | ❒ | ❒ |
| Clearing the Search field | ❒ | ❒ | ❒ | ❒ |
| Searching Note contents | ❒ | ❒ | ❒ | ❒ |

Split page only for those who answered no to question 1.

## N2. Please tell us why you don’t use the ECM system?

* Not required in my role
* Admin team use it for our area
* Don’t know how to use it
* Didn’t know I had to use it
* Other

If other, please tell us why?

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After Q N2 – continue with question Y8.

**Delivery of Future Training**

## Y8. Have you attended ECM (Dataworks) training in the last 2 years?

Yes

No

## N3 – Would you like to attend a training session?

* Yes
* No – I don’t need to
* Other

Please tell us why?

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## N4. What type of training would suit you best

* One on one , in person
* **ECM Clinic in Anderson Street**
* **Formal Group training session**
* **Other**

Please specify,

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## N5. Any final comments you would like to make about the ECM survey?

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**Thankyou, in anticipation, for taking the time to complete the survey.**