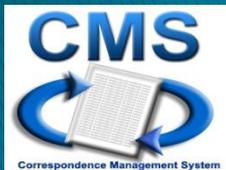




The Correspondence Management System

**Council of Federal Executive Secretariats Meeting
October 4, 2011**

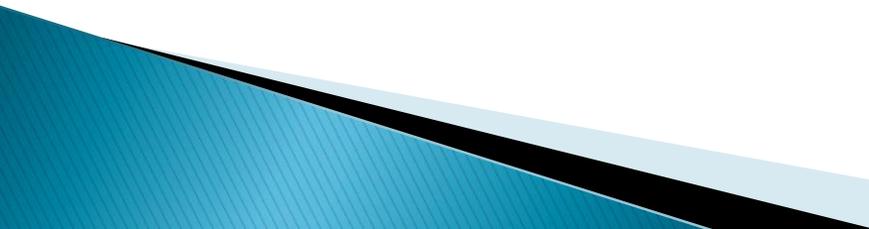
Keith Livingston, CMS System Administrator



[HTTPS://CMS.EPA.GOV/CMS](https://cms.epa.gov/cms)

Office of the Administrator, Office of the Executive Secretariat

What is CMS?

- ▶ CMS is the Agency's correspondence tracking and workflow management system.
 - ▶ At present we have approximately 3,200 EPA employees in each of the 23 program and regional offices throughout the Agency registered to use the system.
 - ▶ CMS is an internal EPA Intranet based application that is accessed throughout the Agency. It can also be accessed remotely using Access Anytime Anywhere (AAA), e.g. through the F5 Firepass or Citrix software.
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What is CMS?, Cont'd.

- ▶ What are some of the features and functionalities of CMS?
 - It scans, logs, routes, tracks, and stores incoming and outgoing correspondence, related metadata, and auxiliary documents.
- ▶ How's it do it?
 - By shepherding electronic versions of correspondence through creation, editing, review, approval, and close-out processes, producing an electronic duplicate of paper records.

Where in EPA is CMS Used?

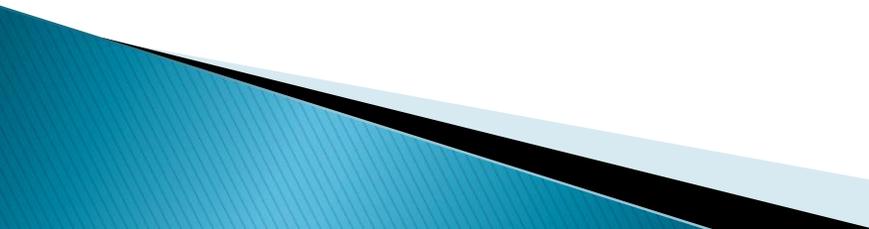
- ▶ 12 program offices, 10 regional offices, Research Triangle Park, the labs, and the Office of the Administrator



Benefits of Using CMS

- ▶ Benefits gained from using CMS include:
 - Faster Processing and reliable delivery.
 - Unlimited Search capabilities.
 - Complete correspondence history.
 - Flexible Workflows
 - Control metadata associated with each assignment.
 - Easy Access – Web based using a thin client.
 - Instant retrieval of records.
 - Lotus Notes e-mail notification.
 - Training and Support

Overall Benefits to the Agency

- ▶ Time savings which translates into hundreds of work hours each year available for other functions and activities.
 - ▶ Better oversight and accountability in correspondence processing, resulting in faster responses and fewer overdue assignments.
 - ▶ More reliable and thorough gathering and storage of correspondence-related record material (the government by law must document its decision making and programmatic activities). We are creating better records as a direct result of this application.
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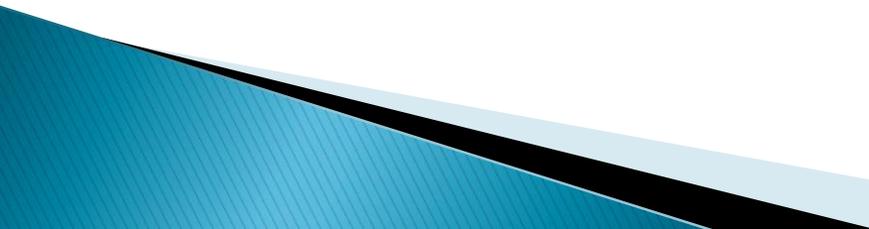
Overall Benefits to the Agency, Cont'd.

- ▶ Material resources saved in terms of paper, folders, and discs; labor savings (reduced FTE requirements) in terms of routing and document handling.
 - ▶ Faster and more thorough document search and production for FOIAs, legal discovery orders, and Congressional inquiries; greater confidence in adequacy of search.
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Secure Management of Information

- ▶ Each user must have an active account to access the system.
 - CMS currently has two levels of access which consist of Coordinators being the highest and Author/Editors.
 - ▶ CMS has access controls (ACLs) –inherent to the application– that restricts the viewing of your assignments only to your office.
 - ▶ Additional security measures such as adding password protection to documents is also available.
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Milestones

- ▶ CMS went live in October 2004.
 - ▶ The Agency has captured well over 100,000 pieces of correspondences since we began using the system.
 - ▶ As of January 2010, CMS was linked to the Enterprise Content Management System (ECMS); a link that affords us the ability to transfer closed correspondence to ECMS and store them as official electronic records.
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Milestones, Cont'd.

- ▶ This year we successfully rolled out a newer version of our scanning software, InputAccel 6.0, along with a new search interface that allows our users to seamlessly search for CMS records that have been transferred to ECMS.
- ▶ We are in the process of consolidating our server footprint –from approximately 7 servers – into a VMWare virtual server environment as a part of the Agency's Green IT initiatives.

Milestones, Cont'd.

- ▶ We are in the process of upgrading CMS from our current Documentum platform, D5.3 to D6.x.
 - This upgrade will allow us to operate from within a more robust software platform.
 - Leverage more features.
 - Additional cost savings.

Questions

Contact Information

Keith Livingston, CMS System Administrator

(202) 564-9962

livingston.keith@epa.gov

Tanyan Bailey, CMS Systems Administrative Analyst

(202) 564-3133

bailey.tanyan@epa.gov

Joseph A Hall, Assistant CMS System Administrator

(202) 565-0036

Hall.josepha@epa.gov

CMS_Information@epa.gov

CMS Helpline (202) 564-4985