

## EMC Documentum Solution for Grants Management

### The Big Picture

- Streamline and automate all phases of the grant process
- Speed grant development with predefined forms containing standard language
- Coordinate electronic submission between multiple submission platforms
- Manage and measure grants throughout the grant lifecycle
- Support bi-directional information exchange with citizen and agency portals

## Increasing responsiveness, visibility, collaboration, and accountability across the entire grant process

As grantors, government agencies distribute billions of dollars in grants every year to other federal/national, state/regional, and local agencies and other beneficiaries. Grants enable many organizations to expand their operations and launch initiatives they would otherwise be unable to achieve.

Developing a grant is a complex process. The EMC® Documentum® solution for grants management enables agencies to manage the grant throughout its lifecycle, with powerful tools that streamline, automate, and manage the grant process for grantors—enabling them to more effectively achieve their organizational missions.

### A complete solution built on the EMC Documentum platform

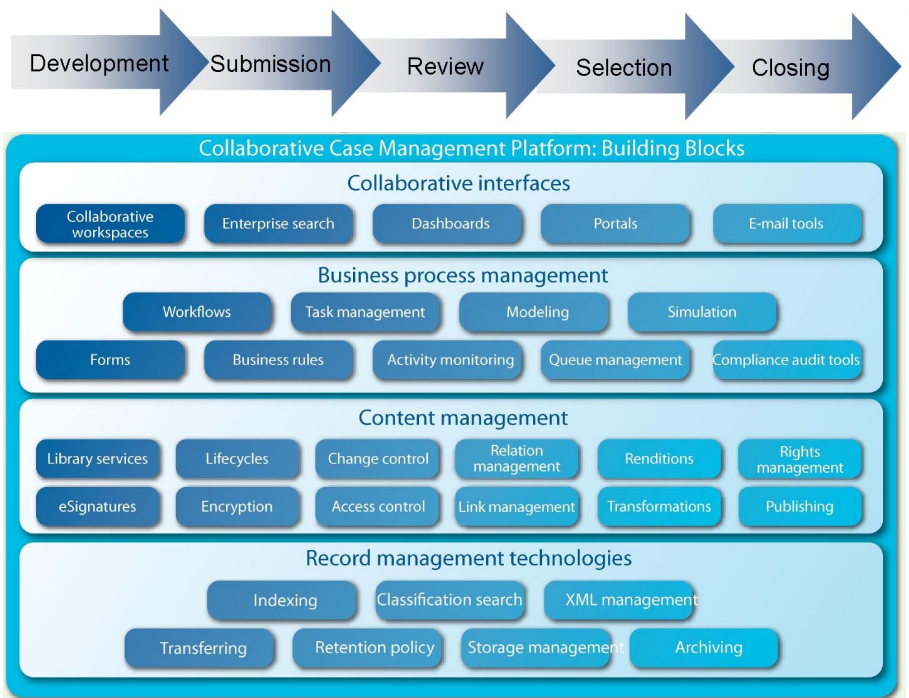
The Documentum solution manages the entire grant lifecycle, offering front-end and back-end components. The front end facilitates data capture through electronic forms and digital imaging, which is ideal for accepting grant requests. The back end manages all of the processes associated with awarding or accepting a grant such as assigning grant identification numbers, setting report dates, tracking the use of funds, communicating with grantees, and closing a grant.

The solution applies records management, business process management, and content management; intelligent capture; federated search; collaboration; and comprehensive reporting across the five stages of grants management: development, submission, review and selection, management and reporting, and closing. The solution reduces grant development cycle time, improves responsiveness, lowers costs, and eases compliance with regulatory mandates. At the same time, the Documentum solution also:

- Enables a single point of information access for grant stakeholders
- Seamlessly manages images, audio and video, correspondence, legal documents, faxes, print and digital data streams, and e-mail
- Improves process visibility with a consolidated executive dashboard
- Provides configurable workflows and business rules
- Delivers standard and customizable forms and templates
- Integrates easily with external systems, connecting systems through a service-oriented architecture (SOA)

### Manual, paper-based processes add unneeded complexity to grant development

Anyone who has developed a grant program can attest to the complexity of the process. In many organizations, this already complex endeavor is a labyrinth of manual, paper-based processes.



*The Documentum solution for grants management is built on the EMC Documentum Collaborative Case Management Platform, which provides broad capabilities to meet the content management needs of a variety of government agencies*

Moreover, these inefficient processes are supported by paper case files that obscure visibility into what's going on; increase the risk of errors, omissions, and lost documents; and slow decision making. The Documentum solution can reduce this reliance on paper and manual processes—streamlining and simplifying the grant process.

### Delivering value at every stage

From electronic document capture and virtual case file (VCF) technology to secure collaborative workspaces and automated workflow, the Documentum solution for grants management delivers extraordinary capabilities to grant developers, analysts, and case managers.

#### Development

Developing a grant is a highly collaborative process that requires gathering a lot of information—in many different forms—and discussing that information with stakeholders. When development is primarily manual and paper-based, hardcopy files can become procedural bottlenecks before the process has even gotten off the ground. Meeting via phone and e-mail and routing information through e-mail attachments and paper distribution simply adds more work to an already labor-intensive process.

With the Documentum solution, the development process can be triggered automatically through submission of an online form, which creates a virtual case file (VCF). Unlike a hard copy case file, a VCF can include any type of electronic content such as still images, audio, and video. A virtual case file can be managed with automated workflows and business processes to:

- Enforce the use of standard terminology
- Drive consistent processes across locations and departments
- Enable multiple parties to have simultaneous access to case files
- Reduce lost or missing documents and ensure accuracy
- Decrease printing, distribution, and storage costs

This increased efficiency at the development stage means faster development and accelerated, higher quality grants.

## **Submission**

The electronic forms capabilities of the Documentum solution enable grantors to create standards-compliant forms, which allow them to accept grant applications through a variety of channels including Grants.gov, where all federal grants are published, and agency websites. Receipt of an electronic submission through a grantor's website can trigger the automated business processes used in the review and selection phase.

## **Review and selection**

The speed and quality of decision making during the review and selection stage improves dramatically when stakeholders can collaborate, instead of circulating multiple copies of grant applications. With the Documentum grants management solution, grant case managers can create secure, digital team rooms to share information, review applications, and reach consensus. Virtual case files can be attached to team rooms and protected with tiered access controls.

VCFs and automated workflows enable intelligent case routing, which can deliver grant applications to the right people in advance of collaborative sessions. Intelligent case routing leverages business rules embedded in workflows and repeatable processes to tap the proficiency of domain experts and apply accumulated knowledge from prior grant reviews. It also ensures that deadlines are met and necessary approvals obtained while maintaining comprehensive audit trails to meet compliance requirements.

When grantors need to formally notify grantees of an award, they can use another feature of the grants management solution: its ability to automatically generate and publish personalized communications using customizable templates. For example, a grant award notification could be triggered automatically via workflow at the final grant approval stage.

## **Management**

The audit and reporting capabilities of the Documentum solution enable grantors to track dispersal and use of funds. The Documentum solution enables grant managers to:

- Create business rules that enforce development guidelines at the task level
- Monitor work assigned to individuals or teams in the development process
- Set alerts that notify managers of pending report dates and trigger outbound communications
- Track funds receipt acknowledgements

## **Closing**

Many grants are renewable annually. The business process management features of the Documentum solution ensure that key milestones are met for republication. The repository enables prior development information to be accessed quickly, revised, and reused—streamlining and accelerating resubmission.

Even renewable grants must be closed each fiscal year. Once a grant is closed, the grants solution controls end-of-life for case documents and other content. It employs predefined business rules to automatically enforce content retention and disposal policies. Virtual case files are electronically locked down and archived upon resolution. This ensures ready access to information for regulatory requests, such as FOIA, internal and external audits, legal disputes, and best practice reviews.

The solution enables compliance standards and procedures to be embedded in repeatable processes that enforce appropriate review and, when required, timely submissions. The repository audits all process activities and stores the audits as business records—enabling government agencies to prove compliance.

## End-to-end grants management

Legacy systems, which are reliant upon monolithic architectures and can't accommodate new technologies, are costly to upgrade and don't scale easily to meet the increased demands facing all government entities. With only limited or non-existent workflow, they can't automate and streamline grant processes or support search across other proprietary systems that may house vital information. Consequently, for today's government agency, these systems make an already difficult task even harder.

By contrast, the Documentum solution for grants management enables direct information capture through electronic forms or the scanning and imaging of hardcopy documents. It can trigger workflows that enforce standard processes, automatically notify grant managers with case status, and provide visibility across the entire grant process—a 360-degree view of information—and much more. From a single, scalable, standards-based platform, the Documentum solution can:

- Support secure, concurrent, 24x7 access to information with no geographic constraints
- Enhance collaboration among grant developers, analysts, and other stakeholders
- Generate personalized outbound and interagency communications
- Provide automatic notifications and intelligent document routing
- Enable management oversight of multiple grants with dashboard reporting and workflow monitoring
- Embed compliance guidelines in business rules
- Reduce paper through electronic document capture
- Archive closed cases electronically to ensure rapid access

## EMC and partner content management solutions

This solution is one of many content management solutions offered by EMC and partners.

EMC and partners provide content management solutions that help organizations to solve business problems specific to their function or industry. Built on the EMC Documentum platform, and combining EMC and partner technologies and services, these solutions help organizations to streamline and automate processes, increase productivity of teams and individuals, address their information compliance and retention requirements, foster creative work, and lower the cost of operations.

EMC and partner content management solutions are designed to shorten deployment cycles as well. These solutions encompass a full range of integrated EMC products and professional services, combined with EMC-certified partner technologies and professional services. The combined industry experience and process expertise of EMC and our partners help you achieve maximum value in minimum time.

## About EMC

EMC Corporation (NYSE: EMC) is the world's leading developer and provider of information infrastructure technology and solutions that enable organizations of all sizes to transform the way they compete and create value from their information. Information about EMC's products and services can be found at [www.EMC.com](http://www.EMC.com).



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### Take the next step

To learn more about the EMC Documentum solution for grants management, call **800.607.9546** (outside the U.S.: +1.925.600.5802) or visit our website at [www.EMC.com/connectedgov](http://www.EMC.com/connectedgov).