NATO

Setting new standards in document management.

About Nato

For the North Atlantic Treaty Organisation (NATO), standardization and data exchange are the keys to improved efficiency and cost-effectiveness – and very often NATO acts as a forerunner for its member states. Together with Logica, now part of CGI, NATO is now setting new standards in document management for the transfer of expertise. The new system – used as a "core service" – is now putting part of NATO's long-term knowledge management strategy into actual practice. Within the context of a service-oriented architecture (SOA), the main information systems can now utilize the system, for storing documents, for example.

The challenge

Highly complex organizational structures, strict security requirements and a high turnover of personnel used to hinder the exchange of information and knowledge within the organization. Member states usually delegate staff for a period of three years. Their data is generally stored on local file servers. In order to reliably evaluate documents NATO-wide with minimal effort – and in accordance with internal regulations – we have created a multi-site 'Document Handling System' (DHS).

Key benefits

- Multi-site document availability with semi-automated data migration

- High level of user acceptance with a secure access rights system

- Complete integration with Microsoft Office

- Open architecture

- International transfer of knowledge and know-how

- Noticeable efficiency

CGI

Our answer

We designed, planned and developed the entire system. The global IT and consultancy services supplier also carried out the NATO-wide roll-out, including employee support and training. An international team of around 20 specialists was on hand to ensure the success of the project – and the security of NATO's IT investment.

Our partners provided additional expertise: HP provided the hardware configuration and installation and Microsoft supported the architecture development. Our subsidiary, Integrata Training, designed and implemented all the training programs, including computer-based training. Thanks to their experience in large projects and document management, our experts know all the essential success factors for DHS. That is why the emphasis was on quality during project planning and execution – and on a high level of user acceptance.

DHS is one of the first NATO multi-site IT systems. This means that over 25,000 civilian and military personnel in Europe, Turkey and the USA can work – with our solution – in the closed NATO "Secret Network" spanning 23 sites.

- **Design and development:** In tightly meshed communication and coordination processes, uniform workflows can now be defined for document management and for both functional and efficiency requirements – enterprise-wide. NATO document release and signature procedures, for instance, are signature procedures, for instance, are fully supported. The granting of access rights in the system is extremely strict. Documents with a high security classification are simply not displayed – not even in a list of search results. The DHS' search procedure uses metadata and full text. Total integration with Microsoft Office facilitates further document processing.

- **Implementation:** We carefully prepared the roll-out at each site by means of comprehensive site surveys. An installation package was then created within the "Tailoring" frame-work – customized for every site's individual organizational structure and access rights requirements. We tested this package in a pre-implementation procedure before every roll-out.

- **Data migration:** Within the framework of "Back Publishing", documents to be migrated were classified and flagged with the necessary metadata. Our "Back Publishing Expert" supported NATO personnel in document migration procedures – and uploaded thousands of documents on site.

- **Training:** At the same time as the rollout, IT managers, power users (functional admins) and users received intensive training at every site. A computer-based training application was also made available later. During the entire roll-out phase, we provided support for NATO users and administrators through a Help Desk, created especially for the project.

- **Productive phase:** From the time the system is accessed, users can immediately find their documents in automatically created document libraries and can work productively and efficiently. All new metadata is inserted into documents automatically where possible.

"We wanted a user-friendly application for our new document management solution, one which would give all our users fast access to the data they need for their particular jobs. Logica, now part of CGI, has given us a solution which does exactly that."

Steven Janis, Core Portfolio Coordinator, NATO C3 Agency

Technical background

NATO's version of DHS is based on Microsoft Office SharePoint Server 2007. The solution consists of two frontend web & search servers, an index server and an SQL server with two cluster nodes per site. All servers run on Windows Server 2003 R2 and are connected to the site's gigabit network and the storage area network (SAN). This sustains a high level of availability and performance throughout the entire system – and offers a solid platform for future expansion.