

HP TRIM solution enables Southern Grampians Shire Council to meet increased demand for services

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Objective

Southern Grampians Shire Council wanted to gain centralised management and distributed access to documents and records.

Approach

The Council implemented an HP TRIM Enterprise Content Management (ECM) system with demonstrated ease of use and proven acceptance in local government.

IT improvements

- Total control of the change management process.
- Improved access to information throughout the organisation.

Business benefits

- Flexibility in implementation and financial costing.
- Better capture of documents and records, particularly emails.
- Platform for increasing workplace efficiencies.



The Southern Grampians Shire Council is located west of Melbourne in the south eastern Australian state of Victoria. The local government area’s economic landscape is rapidly evolving from its traditional farming base to include forestry, mineral sands production and tourism.

Centralised information system needed to meet demand

The Council has recently been investing in its corporate systems to meet increased demand for services flowing from economic growth coupled with more stringent regulatory compliance obligations.

A key issue was the lack of a single centralised corporate information system. Instead the Council had multiple filing systems in multiple departments spread across various locations. Many of the departmental systems were paper-based, with the

HP customer case study: HP TRIM software allows Southern Grampians Shire Council to improve the quality and accessibility of information to drive workplace efficiencies and meet increased demand for services

Industry:
Local government



Council's central system a mixture of paper-based files and records and a legacy electronic document management system.

The lack of a consistent corporate information system made documents and records difficult to be accessed and there were additional challenges ensuring they were captured in the first place.

Implementing a new document management system was identified as a key corporate systems project to improve the quality of information that staff can access and to drive workplace efficiencies to meet increased demand.

"We had been operating with a very limited manual document management system for several years," says Belinda Johnson, corporate support manager. "We needed a new document management system that was flexible, had a track record of successful implementation in local government, and was stable and easy to use."

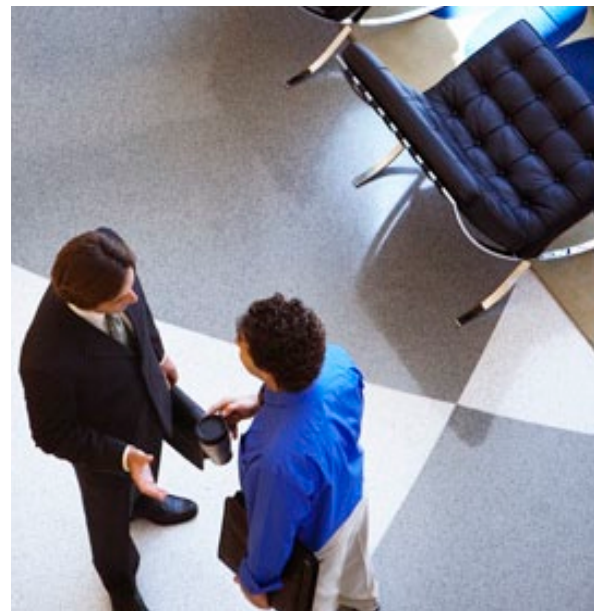
Southern Grampians also wanted to make sure the new system was compliant with the Victorian state government's Victorian Electronic Records Strategy (VERS) standard, even though this was not an immediate requirement. "We wanted to make sure that the system would grow with us as our requirements become more complex," said Johnson.

Following a call for expressions of interest, Southern Grampians evaluated a number of different software solutions but with limited success. The principal stumbling block for a number of vendors was their inability to handle the conversion of the Council's existing documents. "Many document management vendors weren't interested in the conversion of our old documents because the system in which the information was kept was far too complex," comments Johnson.

So the Council decided to do some legwork itself. "We visited various councils and talked to them about why Enterprise Content Management (ECM) solution had gained the best user acceptance," explains Johnson. "We identified and evaluated the market leaders in local government and in the end we selected HP TRIM. The main reason was simply its ease of use. This was the most important factor in achieving our objectives."

Flexibility puts council in total control of implementation

The initial focus for the Council in implementing the new solution was the conversion of legacy data and the scanning of paper-based information into the



new electronic repository. This process started with the central filing system, including file types such as insurance, rates and council correspondences.

Over time, the Council will be increasing its use of HP TRIM to eventually include over 30 different file types such as employee files and contract files. These are all being brought online so that everything is saved and accessed through HP TRIM.

The move to a modern electronic document management system is driving cultural change among staff. While this has been generally welcomed and embraced, some staff have required additional support. "We have a mixture of employees in terms of age and skills and some are more computer literate than others. It is all about balance and support, having a mixture of personalities and abilities to adapt the change," said Johnson.

Southern Grampians engaged HP Preferred Partner, FYB Pty Ltd, a specialist in the implementation of electronic document and records management solutions, to assist with the change management process.

"FYB has helped enormously," says Johnson. "Other consultants we evaluated just wanted to come into the project, implement a system and walk away. They wanted to bring all the staff on to the new system overnight. We didn't feel that our organisation would benefit from that kind of change. With FYB's help, we are bringing everyone onto the new HP TRIM system on a gradual basis and in that way, they can support each other."

One of the key purchasing factors for Southern Grampians was flexibility – firstly in rolling out the new system throughout the organisation, and secondly in the area of financial costing. The Council required a phased implementation where it could purchase components as they were implemented and only the number of software licenses actually needed at each stage. FYB was able to structure the implementation, software licensing, and the training to suit the Council’s schedule. This approach enabled the Council to be in total control of the project at all times.

“FYB didn’t just propose a bundle of products and support items and leave it at that,” states Johnson. “The company’s approach was to structure a package that suited us and what we wanted to do. They worked with us to implement a solution that we could roll out in our own timeframe.”

ROI comes from better information capture and access

Since the implementation of HP TRIM, Southern Grampians has achieved a number of significant benefits – including improved access to information, increased staff productivity and better capture of documents and records, particularly emails. More benefits are expected as the system continues to be rolled out to capture additional information types and become integrated with more business processes.

While the biggest benefit is for users who previously had to travel to access council files, there are productivity benefits for users accessing files that were previously stored locally as well.

“Having access to corporate data in one location from anywhere in the organisation is a huge benefit. Being able to see something at their desktop rather than having to get into a car to come to the Council’s head office in Hamilton is leading to an increase in workplace efficiencies,” comments Johnson.

“Even where a file is onsite, the ability to find it without having to leave your desk saves a lot of time. If someone asks me what the interest rate was three months ago, for example, I can now bring that straight up on my desktop rather than have to go and search through central files for the correct document.”

Customer solution at a glance:

Primary software

- HP TRIM
- HP TRIM Enterprise Content Management
- HP TRIM Document Assembly

The Council now has greater assurance that the information it needs to run its business is being captured at the point of entry, including email communications.

“The ROI that comes from the assurance that data is being captured, including things like email that are traditionally harder to capture, is immeasurable from a risk point of view,” explains Johnson.

“With any document management system, you’ll capture all the Word and Excel files because of the discipline of saving each time you exit a document. But it is so easy to lose an email. Now we click one button and the email is filed in HP TRIM. Before, it used to be: print it out, scan it and then file it. That is very important because so much of our communication is by email now.”

Improving business processes by building on HP TRIM

With much of the scanning of paper-based information completed, Southern Grampians Shire Council is now turning its attention to improving its business processes with HP TRIM. The Council has purchased the HP TRIM Document Assembly module and is building standard templates for correspondence to boost staff productivity.

“We are creating standard documents in HP TRIM so staff don’t have to think so much about how they are going to compose a piece of correspondence. The system provides a standard letter and it automatically fills in certain fields for them,” concludes Johnson. “Later on, we envisage scanning in building applications and any other plans and associated documents, and we will have a TRIM file for every building application.”

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