

City of Ryde Drives Business Forward with Enterprise-wide Information Management Solution

Effective Case Management in HP TRIM Improves Business Processes, Builds Foundation for Single View of Customer Information



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– Linda Shave, Information, Integration and Compliance Manager for the City of Ryde.

HP customer case study:
HP TRIM software enables local government organisation to create a complete information management solution, meeting state government requirements and improving operating efficiencies.

Industry:
Local government

Objective:

Comply with state government requirements and improve services and operating efficiency.

Approach:

Migrate from paper to electronic documents and implement effective case management in HP TRIM to create enterprise-wide information management solution.

Business Benefits:

- Document scanning and registration time reduced from 5 days to 4 hours
- Human Resources improved; efficiencies, response times (in some cases under 24 hours) and reduced costs
- eDiscovery response times for information being requested in some cases reduced from 10 days to 2 days
- Improved customer service and productivity
- Enables single view of customer information
- Met state government compliance requirements in a timely manner



The City of Ryde – with around 100,000 residents and 40,000 dwellings – is a local government area in the Sydney metropolitan region in New South Wales, Australia's most populous state. Home to many of Australia's major technology companies, the City of Ryde is part of an ever changing, dynamic global marketplace. The City Council is committed to maintaining a socially sustainable city as well as providing effective decision making processes that ensure transparency and involvement of its community.

"We realised that if we structured our use of HP TRIM we could effectively improve our processes," says Linda Shave, the City's Information, Integration and Compliance Manager.

"We brought over 38,000 property folders into HP TRIM. The scanning had to be high quality, supporting colour, large size formats up to A0, and very large volumes. Everything had to be converted into text searchable PDF because if you go to court you need to be able to support eDiscovery."

Linda Shave, Information, Integration and Compliance Manager for the City of Ryde

Challenged to Meet Increasing Demands

Government agencies at all levels are facing challenges to meet ever increasing demands to be transparent in their processes, deliver online services, improve staff training and retention and effectively capture, manage and preserve information assets.

In particular, the City of Ryde has been challenged by a number of government drivers such as the ePlanning initiatives to deliver better planning services, the Service Delivery Capability Model, People First - A new direction for ICT in NSW and the benefits of e-Government by the use of electronic systems to reduce red tape and improve business efficiencies. This called for end-to-end planning for a complete information lifecycle management solution to improve efficiencies and extend collaboration within Council.

"What we needed to do was to better capture information – to get the right information to the right people at the right time to provide customer service excellence," said Linda Shave, Information, Integration and Compliance Manager for the City of Ryde. "We realised that if we structured our use of HP TRIM we could effectively improve our processes."



Before implementing a solution, the City of Ryde undertook a review of the functionality of the HP TRIM Enterprise Content Management system, which Council already used for the capture, management, searching and publishing of information. The Council needed to ensure HP TRIM could provide the necessary transparency, efficiencies, and improved processing times as well as providing a framework for sustainability.

"You can have information coming through the door but if you can't store it, find it and retrieve it, the process isn't going to be sustainable or maintainable," said Shave. "We had to have robust workflows and recordkeeping around the new processes. It wasn't just about compliance, it was more about needing to be really efficient in what we did."

It quickly became apparent that HP TRIM was able to support all the required functionality and the eTRIM case management solution began to evolve.

"People have embraced the solutions and wanted to come on board. This continues to make it easier to extend HP TRIM and our information management framework in our business solutions."

Linda Shave, Information, Integration and Compliance Manager for the City of Ryde

A Solution for Development and Planning

One of the many services provided by the City of Ryde is development and planning. This is the responsibility of the Assessment Team within the Environment and Planning department. The team's primary role is to achieve good planning and environmental outcomes for customers by providing an efficient, effective and transparent assessment service.

The creation of a new information management solution commenced with a full process analysis of the end to end planning cycle. This involved brainstorming sessions including developing a functional model for planning and identifying all inputs, outputs, relationships to other business activities, business units and responsible persons involved in the process.

"We looked at the Development Application and Building Application processes, among others, so we could identify the input and output points," said Shave. "We asked questions like, when did we expect to receive information, what did we expect to be the output, and what was the sequence of events that needed to be triggered? We created a whole roadmap of the process."

With the aid of the Information and Records department Shave translated information into case folder structures within HP TRIM to support planning services such as pre-lodgement, applications, appeals, inspections and enforcements. This new structure was named "eTRIM" to differentiate it from the previous HP TRIM solution.

Once the case management structures had been agreed, and relationships and workflow actions identified by business representatives, an extensive digital scanning exercise was undertaken for capturing and registering records into HP TRIM.

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HP TRIM for Development Applications was introduced four weeks from the first brainstorming sessions. This was closely followed by Principal Certifier Applications, Voluntary Planning Agreements, Compliant Development Applications, Pre-Lodgement, Building Certificates and Business Registrations. Within four months, full colour scanning of all plans including A0 plans and stamped approved plans was underway.

The case management approach built on HP TRIM quickly lead to increased transparency, efficiencies, and improved processing times for all planning services such as pre-lodgement, applications, appeals, inspections and enforcement.

The time taken from receiving a document to making it available to staff was reduced from five days to four hours, improving processing times for many services by around a week. Change management issues often encountered when implementing new solutions were kept to a minimum as the business had been involved in the process from the beginning.

"With eTRIM, our document processing time has gone from five days down to four hours,"
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Enterprise-wide Information Management

HP TRIM was so successful in achieving the desired outcomes that it was decided to continue to extend the solution to other departments.

The City of Ryde embarked on a program of continuous improvement by systematically implementing HP TRIM throughout the enterprise. Within twelve months, the Council completed the implementation of full case management solutions based on HP TRIM for departments including Human Resources, Finance, Risk Management, Project Management, Councillor Services, Rates, Venue Management and Parks.

"By building recordkeeping into the process we have made it easier for the business to use HP TRIM and by making the system simple to use the adoption has been very rapid," said Shave. "People have embraced the solutions and wanted to come on board. This continues to make it easier to extend HP TRIM and our information management framework in our business solutions. A lot of organisations have worked on similar projects for a number of years and still do not have what we achieved in just over a one year."

The City of Ryde's new information management solution continues to evolve to meet new challenges. "Continuous improvement is a very important part of our information management and customer service excellence road map," said Shave. "The world is moving, Government drivers for transparency are growing, customers demands are changing, and business challenges to respond to these demands are changing on a daily basis."

In creating an information management solution for Human Resources, for example, the Council was motivated by a number of government initiatives including People First – A New Direction for ICT in NSW. These stressed the need for a closer alignment of HR functions with the business and raising the skill level of employees as part of building service delivery capability and maturity.

Linda Shave worked closely with the Human Resource team to develop a new HR system to meet these challenges. Known as "eHR", the initiative utilised HP TRIM's workflow and security capabilities to create new services and integrate with the Council's HR application to provide a single view of all HR-related documents.



eHR introduced dedicated scanning of all documents into text searchable PDF for electronic archiving, eliminating the need for paper folders. This enabled the City of Ryde to make a complete transition from paper to digital files and do away with its filing cabinets in the HR department.

The result has been to improve processing times dealing with internal business units and external agencies in some cases bringing it under 24 hours. "HR Staff have instant access to information and do not have to go out and get paper folders for things like employee folders and Occupational Health and Safety as this is all captured and saved into electronic folders therefore improving the overall time in searching, retrieving and working together," said Shave.

The eHR initiative has improved Council management's ability to undertake activities such as performance management. It also conforms with NSW State Records' Standard on digital record keeping for Human Resource Management.

"We are also commencing on building a fully functional Freedom of Information system using HP TRIM's Web content management and workflow capabilities," said Shave.

Linda Shave, Information, Integration and Compliance Manager for the City of Ryde

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Four Hour Document Turnaround

As HP TRIM continues to evolve throughout the City of Ryde benefits include:

- Improved services and productivity by providing the right information to the right people at the right time;
- Improved efficiencies through well defined business processes and automated workflows;
- Automated notifications and collaborated working, allowing many people to work on the same documents simultaneously;
- The ability to capture information once, storing and managing it in a centralised location; and
- Making information and knowledge more accessible, supporting engagement with users via channels such as email, telephone, and customer service desks.

Perhaps the biggest benefit is the speed with which information entering the organisation is now available to all staff. "With eTRIM, our document processing time has gone from five days down to four hours," said Shave. "We now have a four hour turnaround from entry into the business to availability in HP TRIM. It is an amazing improvement – almost everything Council does it can now do much faster resulting in improved productivity and in many cases reducing the total number of days taken to complete business activities.

The time to meet eDiscovery requests – including Freedom of Information and legal discovery – has in some cases been reduced from 10 days to 2 days.

"We have supported eDiscovery with HP TRIM and can promptly and effectively respond to requests with our fully searchable digital information/data repository system," said Shave. "This also makes us confident that HP TRIM will make it easier for us to respond effectively to future legislative requirements."

"We are proud of what we have done and the results we have accomplished," said Shave. "We have achieved real benefit realisation with minimum resourcing and without having to pay tens of thousands of dollars to consultants. We did it all in HP TRIM ourselves. Our choice of information management platform helps us meet our goals and objectives. I have no doubt HP TRIM will continue to play a critical role in our business for the foreseeable future."

"HP TRIM's Web content management and workflow capabilities will allow us to meet requests with far more accuracy."

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Next Goal - Single View of Customer Information

Council's information management system continues to grow in capacity as well as functionality. "We are now working with Public Works to create a case management solution for capturing all our sewage and storm water nodes and conduits into HP TRIM," said Shave.

Enterprise solutions within HP TRIM also continue to evolve. A future direction for eHR is developing an eResources portal – providing a skills register to share resources and knowledge – utilising HP TRIM's Web Content Management and Web client capabilities.

"We are also commencing on building a fully functional Freedom of Information system using HP TRIM's Web content management and workflow capabilities," said Shave. "That will allow us to meet requests with far more accuracy and allow us to continue to improve the quality and the transparency of the process."

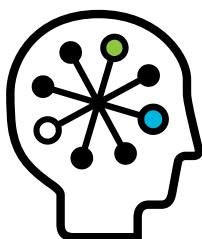
Considering how much the City of Ryde has achieved, it is perhaps not surprising that its next goal is to achieve the Holy Grail of information management, a single view of customer information and full interoperability between its applications.

Achieving that goal relies heavily on integration between Council's business intelligence (BI) application and HP TRIM, which will provide a single source of all records. The planned enterprise business intelligence (eBI) platform will provide a single view across the City of Ryde's Financial, Property and Rating, CRM and HP TRIM systems. Currently Council relies on regular or ad hoc reports to track the progress of applications such as development applications or tree removal applications. With an enterprise wide eBI strategy, it will be possible to enquire, track and report on and budget for all kinds of business activities in real time.

"The first part of eBI is dynamic links straight from the BI system to HP TRIM," said Shave. "The eBI solution will allow enquiries to be done at any level, through one single search engine across any application. Ultimately that will support customer self service as well as further improving Council's service capabilities and efficiencies."

"We are proud of what we have done and the results we have accomplished," said Shave. "We have achieved real benefit realisation with minimum resourcing and without having to pay tens of thousands of dollars to consultants. We did it all in HP TRIM ourselves."

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