Metro record management green, transparent

With HP TRIM software, agency's records management is less expensive, more efficient

Metro

"HP TRIM software has let us maximize the value of our information assets, and to minimize the cost of collecting, managing, sharing, and disposing of them when business needs have been met."
—Becky Shoemaker, Records Officer, Metro Regional Government

HP customer case study: HP TRIM software enables a government agency to reduce costs, improve staff efficiency, and promote citizen engagement

Industry: Public sector

Objective:
Enhanced ability to manage records, enable public access

Approach:
Implement electronic records management solution

IT improvements:
- Users can view thousands of documents 24 x 7
- Serves both internal users and the public
- Forwarding document links, instead of PDFs, has reduced load on network bandwidth

Business outcomes:
- Document management takes 39 fewer hours per month
- 65 percent improvement in staff efficiency
- Monthly postage fees reduced
- Consistent with sustainability goals through reduction of paper use
- Paper archiving reduced by 70 percent
- Duplicate filing systems reduced
- Reduced risks of misplaced or missing records
- Improved document security

Metro Regional Government is a directly elected regional government that develops policies and programs related to the planning, development, and infrastructure needs of 25 cities, three counties, and 1.4 million residents in and around Portland, Oregon. It's an approach to regional governance that is unique to Oregon, and is credited with enabling regional services, such as a light rail system, that have boosted the area's quality of life—and that have enhanced Portland's ability to attract the people and businesses that ensure the region maintains a strong economy and vibrant culture.

> "HP TRIM software provides Metro with the structure we need to manage our 'intellectual capital.' It enables us to integrate the management of information into systems and business processes across the Agency. It enhances our reputation as an 'information agency.' It supports our sustainability goals by reducing our consumption of paper. And it supports our efforts to promote citizen engagement by providing web-based access to public records."
>
> Becky Shoemaker, Records Officer, Metro Regional Government

A major reason Metro has succeeded in its mandate is its commitment to customer service. That, in turn, demands that Metro be both transparent and responsive to public needs.

Nowhere is this more important than in its records systems. When citizens ask to see public records, Metro must be prepared to respond. That's why Metro has implemented HP TRIM software, a leading enterprise document and records management application.

"Metro faces a host of challenges in managing its records and information," notes Becky Shoemaker, Metro Records Officer. "These include the ever-increasing demands of rapidly changing technologies, the growth of electronic records, the diversity of stakeholder groups, and diminishing resources."

Metro's challenges are compounded, Shoemaker continues, by a number of other factors. "We're faced with increasing mandates at the state and federal level regarding compliance," she notes, "and by increasing expectations among constituent audiences for access to public records and information. We implemented HP TRIM software to meet these challenges."

Business process improvements

The initiative to implement HP TRIM software was led by Metro's Solid Waste and Recycling (SWR) Department. In the late 1990s, SWR, which oversees the region's waste management and recycling programs, became concerned about the growing number of records it was maintaining, as well as the increasing number of requests for public information it was receiving.

About a year after SWR began using the HP TRIM application, it was adopted as the document and records management system for the Metro Council. Metro focused on a best practices approach as it implemented the software to ensure that it would support a number of business process improvements including enhanced customer service, better staff efficiency, reductions in storage costs, and protection and classification of sensitive records.

Today, HP TRIM serves as a central repository for a large volume of Metro's public records, including documents related to legislation, meetings, land use decisions, human resource records, accounting and contract records, and correspondence.

Web access to the records is provided by leveraging the software's Web Content Management functionality. As a result, both internal and external users can view thousands of documents 24 x 7 through Metro's search site.

Maximizing the value of information assets

Implementing HP TRIM software has enabled Metro to achieve a number of key organizational goals. "HP TRIM software has let us maximize the value of our information assets," Shoemaker says, "and to minimize the cost of collecting, managing, sharing, and disposing of them when business needs have been met."

Some of the software's benefits to Metro are related to environmental stewardship. When the Metro Council began using electronic meeting packets instead of sending photocopies of meeting documents by mail, it reduced its monthly postage fees by over $600—and saved 2.6 trees per month through reducing paper usage. And that is only one department—the Office of Chief Operating Officer and the Planning Department use e-packets today as well.

By archiving its records electronically, Metro realized additional savings. In the first two years after Metro's Accounting Division implemented HP TRIM software, for example, Metro reduced the number of boxes of paper documents it shipped to off-site storage by 70 percent. This significantly reduced the processing, shipping, and retrieval costs associated with storing paper records.

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HP TRIM software enables Metro staff to work more efficiently. For example, Metro accounting staff now spends 39 fewer hours per month on administrative tasks related to document management, such as auditing, reconciling, research, and adjudicating disputes. This represents a 65 percent improvement in staff efficiency compared to the old, paper-based processes.

Using HP TRIM software has also made it easier for Metro staff to share documents; users can now forward links to documents, instead of attaching PDF files; this has reduced the strain on the organization's network bandwidth. Storing documents as electronic records has freed up office space, because Metro staff require fewer file cabinets.

Commitment to effective government
Since implementing HP TRIM software, Metro has enhanced access to its records, reduced duplicate filing systems, and decreased re-filing—which in turn reduces the risks and costs of misplaced or missing records. It has also improved security by allowing sensitive records to be classified and protected.

Metro plans to leverage its HP TRIM implementation even more in the future, by integrating it with Microsoft® Office SharePoint Server 2007 web portal that will enable more efficient collaboration with other governmental agencies, including the State of Oregon,


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U.S. Dept of Transportation, and the City of Portland, as well as with representatives within the cities and counties of the Portland metropolitan region.

"This project, once again, underscores Metro's commitment to ensuring that records and information management is a strategic component of the Agency's approach to managing its corporate assets, and to the effective operation of government," Shoemaker says.

In addition, the integration of the HP TRIM infrastructure with the SharePoint web portal

will ensure Metro's records meet the ISO 15489 compliance standards of authenticity, reliability, integrity and usability.

But above all, by improving collaboration and information-sharing across a number of intra-agency processes, Metro will extend the benefits and ROI of its HP TRIM software in ways that will continue to benefit the citizens of the Portland metropolitan region and beyond.
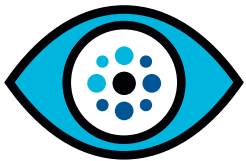
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