

Ordnance Survey puts Records Management on the Map with HP TRIM Software



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Objective:

Ordnance Survey, Great Britain's national mapping agency provides the most accurate and up-to-date geographic data that is relied on by government and businesses. Ordnance Survey needed to improve the availability of business information to staff and rationalize their records management.

Approach:

- Ordnance Survey implemented HP TRIM Software, an Electronic Document and Records Management (EDRM) suite.

IT improvements:

- Reduced network traffic, improved corporate bandwidth owing to fewer large internal emails.
- The solution has enabled less physical paper storage as well as less disk storage capacity.

Business outcomes:

- The system has provided tighter version control.
- Improved security and access control.
- Increased speed of information retrieval.



Geographic information specialist, Ordnance Survey has deployed HP TRIM Software Electronic Document and Records Management (EDRM) system to 1,600 users in order to rationalize the 700,000 folders and 16 million documents in its shared corporate network. This has not only improved the availability of business information to staff, but with over 1,000 new documents being created every day; it forms the backbone of the organization's day-to-day efficiency. In a project designed to introduce records management as a corporate competency, Ordnance Survey is already reaping business rewards from the system; tighter version control, speed of information retrieval, reduced network traffic, improved corporate bandwidth owing to fewer large internal emails, better security and access controls, less physical paper storage as well as less disk storage capacity.

"We now have robust protection of our intellectual property and will be able to work much smarter"

Elaine Grigg, HR project and technical manager, Ordnance Survey

Ordnance Survey is Great Britain's national mapping agency; providing the most accurate and up-to-date geographic data that is relied on by government, businesses and the public alike. Its head office in Southampton houses 1,200 people and the organization has an additional 350 surveyors and other staff working across Britain in smaller satellite offices.

As Elaine Grigg, HR project and technical manager at Ordnance Survey explains, "The sheer volume of corporate information coupled with the challenge of remote workers and regulatory compliance demanded fundamental business change. Prior to the EDRM system, we had a number of paper-based files and electronic folders. In addition to this, people were creating their own unrecorded electronic files on local drives, shared drives and using Microsoft® Outlook. As an interim solution, we resorted the electronic folders and moved them to folders on corporate drives. However, people were still creating their own unrecorded paper files, saving files on local drives or hiding it on other non-shared drives. On reflection, this approach did not work, and was certainly not meeting The National Archives (TNA) requirements."

Ordnance Survey was also keen to meet other regulatory requirements such as those detailed in e-Gov, the Public Records Act, the Freedom of

Information Act and the Modernizing Government white paper. To that end, the Organization embarked on a business change program that was known internally as 'Indigo' rather than as the 'EDRM project' in order to engender a positive, un-resistant perception among staff. The Indigo program was carefully planned to secure buy-in from the highest level within the organization, and to ensure that all areas of the business were engaged and meeting their own requirements.

A marketing and communications plan was also put in place, alongside benchmarks against which to measure the tangible benefits from the program. Indigo was then managed by a specially-formulated project team working to a rigid time plan.

Ordnance Survey had already determined that it needed an accredited EDRM system, and started a formal public sector procurement process. A tender was issued against the organization's own requirements, followed by meetings with six potential software suppliers and then user testing. This lead to a shortlist of three products, which were then evaluated and weighted on technical criteria and functionality by the procurement, records and technical teams. With HP TRIM scoring the highest from both the technical and business teams, the final product decision was not a difficult one, according to Ordnance Survey.



Rapid roll-out

HP TRIM was fully deployed across the organization in just five months. Four people trained staff every day using a dedicated training room. As Vern Birkett, HR services manager at Ordnance Survey and responsible for configuration and training on the project explains, "We wanted to complete the roll-out quickly to give user-uptake of the system a steady momentum, which we always felt was a critical success factor for the project involving significant business and cultural change. And, it seems to have worked for us. We soon reached a critical mass, where more people were using HP TRIM than were not, which seemed to force the issue among the laggards.

"Even though the software is very easy to use, we felt that users did need training," continues Birkett. "Not so much on the product usability, but more about good records management discipline along with hints and tips. So, we utilized HP Software's professional services to pass on a depth of knowledge about the product to our own training team. User feedback is positive. They enjoy knowing where documents are, and that they can easily find what they're looking for, when they need it."

Whilst Ordnance Survey, like many organizations uses Microsoft Office as its main day-to-day desktop tools, it also has around 120 other applications in

use. For user simplicity, they can either save files into HP TRIM, or save them locally and 'drag' them into it.

Gone to plan

With roll-out of the system complete, and users trained, the Indigo project team revisited its benefits realization plan to review the programs success. They are very pleased with the outcomes so far. Email traffic across the internal network has reduced, and it is particularly useful that fewer large file attachments are circulating the organization. Reliance on share drives has also shrunk. However, it is from this point forward that the real work starts.

Grigg continues, "We had started with no corporate records management discipline at all. The Indigo program involved us having a good tidy up of electronic files and destroying some. This allowed us to reclaim a significant amount of physical office space. A file and forget culture has been replaced with carefully defined retention schedules throughout Ordnance Survey. We plan to replace our servers in 18 month's time, and the storage space we'll require would have been far greater without HP TRIM. So, this demonstrates obvious cost advantages."

"We now have robust protection of our intellectual property and will be able to work much smarter," concludes Grigg. "We used to have 900 security user groups controlling the folders and files which was crazy. Permissions to move between security

Customer solution at a glance

Primary software

- HP TRIM Software
- Electronic Document and Records Management (EDRM) suite

HP services

- HP Software's professional services

users groups were administered by our information systems people, which created an administration and efficiency nightmare. This will be resolved now with the EDRM system."

The secret to success?

The Indigo team attributes part of its success to achieving buy-in from the board, early on, and encouraging them to lead by example. To achieve this, the organization's directors were among the very first users to receive training, and this was communicated to staff with pictures of their training posted on the corporate intranet. Communication was also started early. Giant posters were rotated around the offices weeks before the project started, and super users were fully briefed.

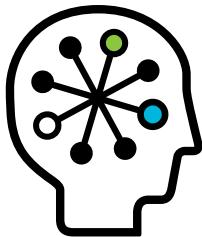
Jan Hutchinson, director of HR and corporate services and business sponsor to the EDRM project at Ordnance Survey explains, "In making our business case for the system, we were able to identify areas where significant cost savings can be made. Time might be a major factor, as searching for specific documents without a system like HP TRIM can be

an extremely lengthy process. Just as important as this though, is the positive impact we can have on customer service with the right information readily available to the right people, when they need it. This brings us much closer to our corporate efficiency goals and will enable sharper business decisions."

Continued innovation

With the main features and benefits of HP TRIM now realized by Ordnance Survey users, the Indigo project team is turning its attention to developing some of the other features of the system. This will include the workflow module as well as managing and tracking paper records with HP TRIM; possibly using bar coding. The organization may also look at zero footprint options, using HP TRIM Ice via a Thin Client web interface.

"We thought it would be harder work to convince users, but our experience has been that once they've used the system, they never go back." Birkett concludes.



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