Prince William County, Virginia

Cleaning up a mess of paper records

"HP TRIM has significantly improved our County Records Management processes; customers have now gained a heightened level of confidence in our ability to accept, track and retrieve their records."
—Earlene B. Dixon, Records Manager, Prince William County, Va.

HP customer case study: HP TRIM tames Prince William County records jumble

Industry: Public Sector

Objective:
Consolidate County records so that they can be tracked effectively in the document management system

Approach:
Deploy a solution based on HP TRIM software

IT improvements:
- Manage more than 400,000 pages of financial records
- Support more than 300 users in 32 county departments
- Cut turnaround times for storing and retrieving paper records from days or weeks to minutes or seconds

Business outcomes:
- Easy, secure user access to business information
- Efficient end-to-end document management across lifecycle and formats
- Scalability to meet future departmental needs
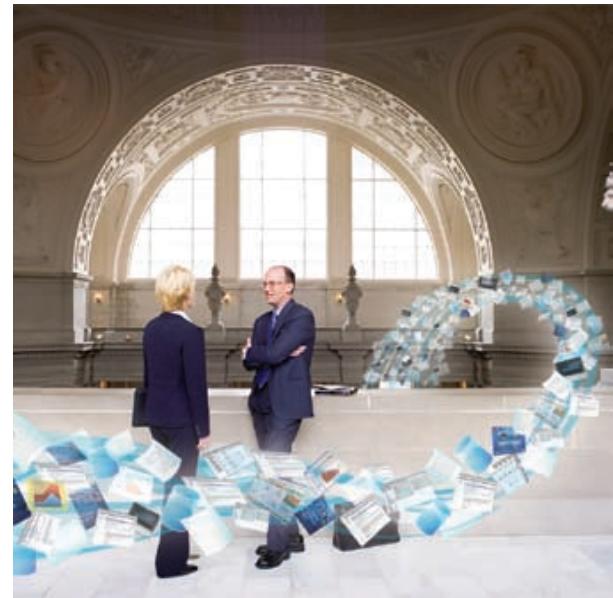
Prince William County is located southwest of Washington, DC, in the Commonwealth of Virginia. The County was formed in 1730 by the General Assembly of the Colony of Virginia; it is home to more than 360,000 citizens and is home to such renowned sites as the Quantico Marine Base, the Manassas National Battlefield Park, and the Potomac Nationals Minor League baseball team. As a document-intensive enterprise, the County financial records account for more than 400,000 pages.

The prior application used to organize records was able to track boxes of records and not folders or files. Inaccurate retentions selected by customers meant that many outdated records remained in storage. Without special training, it was difficult to tell which records were valuable and which were obsolete. The tracking system and the entire warehouse of paper

records had to be sanitized and consolidated. Prince William County Records Manager Earlene B. Dixon knew it would take an enormous effort to successfully migrate the County's paper records to an electronic management system.

"Frankly, those records were a mess," Dixon says. "HP TRIM software cleaned up that mess by giving us a secure, scalable platform to efficiently manage County records."

HP TRIM provides platform

After reviewing potential systems, the County selected HP TRIM as its records management platform. HP TRIM, they reasoned, also would support a future document management implementation. The County development team undertook a year of data cleanup, after which they were ready to import the remaining paper records into HP TRIM.

It began with a three-month pilot program to define best practices for records management and to refine their training process. During this pilot, feedback sessions were conducted to fine tune procedures and to assess performance as new capabilities were introduced. Once they had a base of experience and user data, the development team established a strategy and set goals for rolling out the system to the entire county.

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Earlene B. Dixon, Records Manager, Prince William County, Va.

The system first went live to 200 users in 12 departments and eventually reached more than 300 users in 32 departments. A new retention model enabled each department to manage its own records according to the Library of Virginia Records Retention and Disposition Schedules. The team also combined the Crystal Reports reporting solution with a web interface so that customers could request and review record histories and inventories online. In addition to providing easy access to County records, this function enables customers to review expired files that are scheduled for destruction. Customers also may submit a request to postpone the destruction of any records they need.

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Earlene B. Dixon, Records Manager, Prince William County, Va.

Fast turnaround, expanding migration

The new system cuts turnaround times for storing and retrieving paper records from days or weeks to minutes or seconds. The County hopes to be able to migrate its electronic files to the system so that both current and archived records will be available on the same platform. After business processes for land development are re-engineered, the County hopes to add land and building plans to the system. Says Dixon: "HP TRIM software took care of our longstanding document management issues and also will scale to meet future needs."
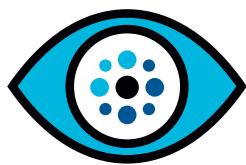
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