


Enterprise Document Management Strategy

Heads of Information Systems Annual Conference 2017

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Context

- Local Government Reform
- Workforce Planning
- Staff Embargo



Housing Section – Ongoing Issues

- Sub-optimal use of iHouse Housing Mgt System
- Multiple parallel systems
- Information Silos
- Lack of standardised processes
- Physical storage challenges
- Lack of integration between systems

Solution for Housing Unit



Streamline

Digitize

Automate

Housing Project Challenges

- Customers (Housing Applicants, Tenants & Grant Applicants)
- Hybrid physical and electronic filing – search and retrieval issues
- Manual movement of paper around the Council and to third parties (i.e. Occupational Therapists, Gov. Depts)
- Information loss – governance and service issues
- Customer service response times – service and KPI issues
- Change Management

Housing Project Objectives

- Reduce no. of paper based processes
- Reduce headcount for administration and operations
- Increase use of automated solutions for document approval
- Drive increases in operational and process efficiencies
- Improve customer service and response times
- Integrate Housing and Finance Applications

Electronic Document and Records Management System (EDRMS) Tender Process

- Issued RFT on etenders (March 2014)
- Shortlisted for solution demos
- Set up Project Team (Project Sponsor – Business Lead, I.S. Lead, Users)
- Laserfiche demo from Bizquip – impressive out-of-box functionality, extensive client base in U.S.
- Bizquip awarded contract (June 2014)

EDRMS Implementation

Server Infrastructure

- IIS Web Application Server in DMZ
- Application Server(s)
- Database Server (MS SQL Server)
- Test Server

Client Infrastructure

- PC (Windows 7, 10)
- Tablets(Android, Apple iOS)
- Smart Phones (android, iOS)

EDRMS Implementation

- Back scan
- Ongoing document scanning & shredding
- Design folder / filing structure & access control
- Design metadata
- Design workflows
- Design forms
- Implement systems integrations

EDRMS Implementation

- Back scan & import to repository
- Document scanning & shredding going forward
- Design folder / filing structure & access control
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Folder / Filing Structure

Folder Name	Creation Date	Last Modified	Template Name
01 - Back Scan	15/02/2014 14:28	08/10/2017 10:46	Heading - Project Folder
02 - Ongoing	15/02/2014 14:28	08/10/2017 10:46	Heading - Project Folder
03 - Design	15/02/2014 14:28	08/10/2017 10:46	Heading - Project Folder
04 - Metadata	15/02/2014 14:28	08/10/2017 10:46	Heading - Project Folder
05 - Workflows	15/02/2014 14:28	08/10/2017 10:46	Heading - Project Folder
06 - Forms	15/02/2014 14:28	08/10/2017 10:46	Heading - Project Folder
07 - Integrations	15/02/2014 14:28	08/10/2017 10:46	Heading - Project Folder

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Metadata

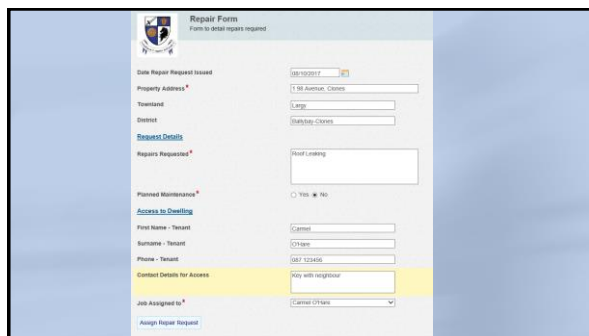
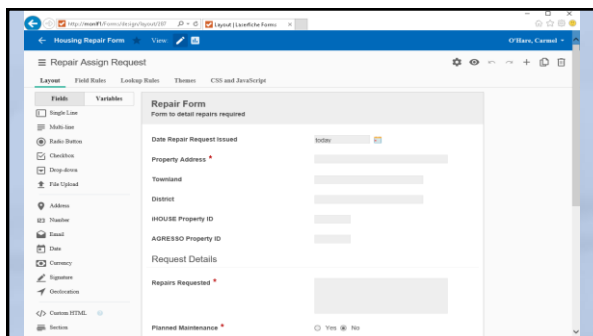
Field Name	Type	Width	Default Value	Nullable	Required	Required for You Template	Indexed	Print
Statutes Document Type	Text	60						Yes
Surname	Text	60						Yes
First Name	Text	60						Yes
Address - Tenant	Text	255						Yes
AGRESSO Customer ID	Text	40						Yes

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System Integration

- Data imported to Laserfiche for metadata selection
e.g. Applicant and Tenant data from iHouse
- Screen-level integration
i.e. iHouse with Laserfiche EDRMS and Agresso FMS

Housing Project Outcomes

Estates Management

- Instantaneous access to all documentation via housing application
- Enhanced customer service through elimination of information loss and improvement in response time
- Automated processes create electronic filing structures for new housing applications
- Generation and acceptance of third party O.T and EHO reports fully digitised

Housing Project Outcomes

Property Management

- Utilising mobile deployments, engineers and craftworkers can submit repair requests, property inspections and SSWPs remotely
- Planned maintenance reporting automated from previously unwieldy spreadsheets

Housing Project Outcomes

Grants Management

- All forms now electronic and automatically generated at specific points in the process
- Departmental Grant Returns now automated
- Immediate process reporting on grants at each stage in the process (e.g. initial inspection, final inspection, etc.)
- Automated prompting based on time and / or events
- Headcount reduction of 1 full time equivalent

Housing Project Outcomes

Change Management

- Support from Senior Management Team
- Staff buy in secured early on
 - Project Sponsor, end users and I.S. involved throughout
 - Project team meetings & informal sessions
 - Initial fear/reluctance letting files go for backscan -> end users with ideas on how Laserfiche can be used to streamline and transform processes (e.g. craft workers and vehicle inspections)

Council Plan

- Multi-departmental roll-out - Laserfiche now in use to varying extents in Finance, MDs, I.S., and Corporate Departments
- Currently rolling out to HRM Department
- Planning Department and Museum on the roadmap to use the Laserfiche Public Portal

Laserfiche Product Suite

- Laserfiche Client – Desktop, Web & Mobile (iOS, Android, Windows)
- Workflow
- Forms
- Record Management
- Public Portal
- Unlimited Server Licence (Production, Test, DR etc.)
- Database options – MS SQL Server or Oracle
- Software Development Kit (SDK)

