

Surrey Heath Borough Council roll-out Electronic Document Management System

The Customer:

Surrey Heath Borough Council, based in Camberley, Surrey is an innovator for improved efficiency and finding better ways of interacting with residents. 80,000 people live within Surrey Heath, a 36.5 square mile area which is one of the safest boroughs in England in which to live. The Council's overall vision for the future is that Surrey Heath will be a safe, green and clean environment in which to live, work, learn and enjoy leisure activities.

The Council has been using a ProcessFlows document management solution for over 10 years – albeit in a very small way to start with as a simple look-up tool for archived documents. This has gradually evolved to form the foundations of an enterprise Electronic Document Management System (EDMS) which will be rolled out across the entire organisation. Over the period, Surrey Heath has significantly improved the sharing of information across departments and deployed lean processes - 'piggybacking' departmental functions to reduce duplication and enabling Multi Function Devices (MFDs) to cut energy consumption. This experience of 'doing more with less' – initiated by their CEO who had seen the benefits EDMS can bring to an organisation in a previous appointment – has delivered significant cost savings without compromising the frontline services that stakeholders rely on.

The Challenges:

The Public Sector as a whole is on an economy drive. Councils will have their budgets cut by £1.165bn this year – and the pressure is on to make savings.

At Surrey Heath, improving look-up processes for documents archived to CD by a third party bureau evolved into an integration of OpenText Alchemy with the council's Graphical Information System (GIS). This streamlined the verification of Planning History Cards against grid reference sites for Planning Control. Staff no longer had to walk to the basement to retrieve the cards and manually plot grid references on the Ordnance Survey map, saving time, dramatically increasing efficiency and enhancing user experience.

At this time, James Rutter, GIS Manager at Surrey Heath was able to further maximise their Alchemy investment and improve management control by importing archived to CD databases from other departments into the Alchemy repository.

More recently, an internal review on electronic document and records management was undertaken. How to handle unstructured data/information, compliance, freedom of information and data protection issues, making information available over the web and security were all discussed.

Surrey Heath has as an ongoing aim to improve document records management and make information more freely available throughout the whole organisation – ultimately all unstructured data entering the organisation will be automatically captured and moved via workflow to the right person. Users will be able to store, locate, view, edit or print documents no matter where those documents are located.



The Solution:

The result is that Surrey Heath selected OnBase as its future ECM solution. *"OnBase is an online system that can handle all our day-to-day information assets"* said James Rutter. *"It provides us with a robust foundation which will not have to be discarded when our line-of-business applications are eventually upgraded, fitting our current and future strategy – to maximise investments and build on the existing infrastructure as budgets allow, in a modular way."*

OnBase is easily integrated as a back-end for existing applications (i.e. with the GIS used by Planning Control, Outlook and MS Office) and/or as a front-end for business process and workflow and delivers immediate content management benefits.

OnBase was firstly integrated with Surrey Heath's GIS. Information held within the Alchemy repository was imported, functionality and content were replicated. OnBase is also integrated with Canon MFDs – further reducing the dependency on paper.

All departments previously using Alchemy for document retrieval and look-up are now using OnBase.

OnBase will gradually be rolled out to other departments and James is confident that each department will take ownership of their departmental solutions – eventually managing all scanning, workflow and document delivery.

“OnBase automatically monitors scan folders. It will need to be fine-tuned to meet the specific needs of each department, but OnBase is transparent to the end-user, so I don’t anticipate too much resistance from users!” said James.

In Development Control, archived tree planning applications have been put into electronic format and added to the system, allowing easy lookup of documents and graphical location. The Tree Planning Officer batch scans all new applications, separating them with patch codes so they are automatically indexed within OnBase – a process that takes just 5 minutes once a week.

The automation of all filing associated with land charges is underway. These documents have to be held for 6 years. Using the OnBase Application Enabler, land charge data held within their Accolade application has been seamlessly integrated with OnBase. Surrey Heath chose to generate indexing bar code sheets and affix these to incoming land charge documents. This allows them to incorporate paper-based documents into OnBase and link the documents directly with the data held in Acolaid.

Application Enabler will also be used to integrate financial information held within the incumbent Oracle financial system – bringing invoicing and POs into the OnBase EDMS.

“OnBase is the only solution available that fitted our criteria for functionality, scalability and budget. It will give us the opportunity to look closely at how paper and information moves around the organisation and demonstrate good governance.”

The appointment of a new Records Manager to continue to drive forward the OnBase project and put policies in place, shows the ongoing commitment by Surrey Heath to run an efficient operation and deliver a better service to the community.



The Benefits:

It is hard to minimise costs in a tough economic climate with reduced investment returns and income, but introducing business process automation - which can take up the slack when staff numbers are reduced and back office costs have to be cut – means it can be business as usual.

OnBase gives Surrey Heath users the ability to capture, index, store, search and retrieve and revise documents from a single interface – saving time, improving workflow and physical storage space.

From the management perspective, OnBase allows greater control and visibility with full reporting and audit functionality.