Dorset County Council Elect to Use OpenText ECM Suite

Paper reduction, process efficiency, and records management enable Dorset to meet future challenges

Industry

Public Sector

Customer

Dorset County Council

Business Challenges

- Need to meet government targets for electronic documents
- Achieve cost savings
- Meet legislation/compliance demands
- Overcome delays in retrieval of paper

Business Solution

- OpenText ECM Suite

Business Benefits

- Reduction in processing times
- Cost savings through paper storage reduction
- Ability to meet compliance requirements
- Instant retrieval and faster query handling of electronic invoices

Dorset County Council (DCC) provides the upper tier of local government for the county of Dorset in England. With County Hall based in Dorchester and other offices located throughout the county, DCC employs over 6,900 people, equivalent to around 4,500 full-time employees.

DCC is responsible for providing services across the county such as cultural, regulatory, adult social care and adult learning services; a broad range of environmental work covering archaeology, historical buildings, ecology, coast and countryside; highways maintenance and waste provision; children and family services, learning and school improvement and inclusion services; and business support services including human resources, IT support and development, legal services and procurement.

There are six smaller district or borough councils covering local planning, council housing, refuse collection, and so on. The districts are then further divided into civil parishes, with parish or town councils. These are responsible for areas such as allotments, footpaths, playing fields, etc. In some areas, the county council shares responsibility with the lower tiers; these include the waste partnership, economic development and regeneration, emergency planning, and tourism.

Central government push for change

DCC initially went out to open tender back in 2004 to identify potential solutions to their needs in response to central government targets for all public sector bodies to implement electronic document and records management.

After researching the market and inviting suitable vendors to put forward their solutions, DCC selected OpenText ECM Suite. They began with the first phase of a pilot study that included tests against the then-prevalent National Archives 2002 standard for records management. The pilot phase included integration to a number of back-office systems, including the corporate property database, the highways public enquiry system, and Freedom Of Information (FOI).

With further pushes around Electronic Social Care Records (ESCR) in 2005, the system was ideally placed to meet these emerging demands having already demonstrated the ease with which integration could be undertaken. The system continued to expand and grow with departments moving onto the system, now known internally as ShARE.

Population growth; not filing cabinet proliferation

With more and more departments embracing the system, the total user community grew to reach nearly 2,000 by the end of 2010, and is expected to keep climbing as the organisation replaces the shared drives over the next couple of years. With new documents and records being added daily, the total number now managed by the OpenText system has exceeded 1.5 million.

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"Trying to educate our users to move away from clicking through a Windows file tree structure is one of the biggest challenges. We have therefore carefully classified and indexed our documents, such that the document we want will typically be in the top four search results—this saves us a huge amount of time and begins to break down the culture change barrier," says Dr. David Reeve, Corporate Information Manager, Dorset County Council.

In the area of accounts payable alone, by scanning all supplier invoices and destroying the paper after a short period, the council is saving the equivalent of 80 metres of shelf space per annum. DCC uses SAP® for their financials, and by image-enabling the system, users no longer have any delay in retrieving invoices.

It's not just the paper that is being reduced within the council. Similar to many such organisations, shared or network drive usage has grown largely unchecked over the years. DCC is now actively moving away from this model and moving all electronic documents to be managed centrally with OpenText. This not only encourages users to think about what they are storing, but documents are discoverable as they have proper classification, which also facilitates better lifecycle management. Disk space usage is also being cut and that means costs are cut too.

The ability to store properly categorised and indexed scanned paper and electronic documents has far-reaching implications beyond the apparent. Security is tighter, data loss is reduced, accessibility is improved, and process speed, case handling, and more is bettered. Front-office staff are now able to better self-serve their information needs, rather than rely on back-office staff and the inherent delays that result.

Driving out the costs

DCC, like all government bodies, are facing budget freezes and cuts in many areas. Through the use of their ShARE solution based on OpenText ECM Suite, DCC, as part of their Information Management Strategy, are underpinning their Meeting Future Challenges efficiency projects. For example:

- Reduction in electronic data storage on servers—estimated savings of £50,000/annum

- Bring scanning in house—estimated savings of £50,000/annum

- Manage email content in Microsoft® Exchange in line with ShARE file plan—estimated savings of £70,000/annum

- Review Highways and Transportation structure and processes—estimated savings of £3,850,000/annum. Part of this will include a move to electronic working using ShARE

- Implement mobile working—estimated savings of £180,000/annum

- Incorporate electronic document management into the asset and work style strategy, which will contribute towards an estimated saving of £2,500,000/annum

- Supporting the Print Strategy Multi Functional Device (MFD) deployment using scanning facilities to scan directly into ShARE. The existing specialist ShARE scanning fleet can be decommissioned (saving £90,000 every three years). The MFDs will also be used with the corporate deployment of ShARE so further specialist scanners will not be required (which would have cost an estimated £300,000).

In addition to tangible, cashable savings, a number of less-tangible benefits are also realisable through the deployment and rollout of the ShARE solution. Users are more able to handle enquiries in a single cycle with all the supporting documentation available to them at their desk. Pages no longer go missing through misfiling or otherwise and information can be relied upon to be the latest available.

Planning for the future

As DCC continues to roll out the solution to staff, other initiatives are being put in place to further improve efficiency, reduce costs, and deliver better services. For example, DCC is implementing Multi-Function Devices (MFDs) that allow users to print, copy, and scan directly into and from ShARE. A recurring saving of around £90,000 every three years will be realised by no longer having to replace specialist devices.

Other areas for the future include the continued roll out across the council, where eventually all employees will be able to utilise the system to some extent to access and store documents. Currently also under consideration is the expansion of the use of Business Process Management/Workflow technology to automate and streamline many of the council's business processes. DCC will be working closely with OpenText's Value Engineering Team to maximise these benefits.

"We're extremely proud of what we've achieved here at Dorset County Council with our information management strategy, but we couldn't have done it without the help and assistance of the OpenText solution. We have taken the opportunity with OpenText and other product users to work in partnership to develop a product that can deliver both improved services and efficiency savings," concludes Reeve.

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