Wodonga City Council centralises and streamlines document management

Overview

■ The Challenge

Wodonga City Council needed a central, electronic document management system to replace its paper-based filing arrangement. The system needed to integrate with the council's existing technology, provide authorised staff with easy access to documents and ensure the council was compliant with state government records legislation.

■ The Solution

Working with IBM® Business Partner† BluePoint, Wodonga City Council implemented the BluePoint Content Manager solution on top of its IBM® Lotus® Domino® platform. Additional modules including BluePoint Records Manager, BluePoint Email Manager and BluePoint Quality Manager were implemented with minimal disruption to users' Lotus Notes® working environment. An intranet site was developed to provide staff with access to applications, tools and information on internal council affairs.

■ The Benefits

Using IBM Lotus Domino and IBM Lotus Notes as a flexible, user friendly platform, Wodonga City Council built a simple yet comprehensive document management system customised to its needs. Documents, key emails, physical records and employee feedback are stored in a central repository, minimising delays and maximising the input of all parties to council projects.

About Wodonga City Council

Wodonga City Council has 420 employees and provides services to a population of 33,890 people spread across 430 square kilometres. Wodonga is the twin city to Albury in New South Wales. The bordering cities form a major growth centre which services a large, rural hinterland in Victoria and New South Wales. Wodonga City Council duties range from collecting rates and maintaining public amenities to supporting Albury/Wodonga tourism and local arts spaces.

Centralised documents in a familiar desktop environment

Wodonga City Council had no central storage area for paper or electronic documents.

> *"Staff were printing documents, storing them in paper files and keeping them in individual filing cabinets. This could lead to delays if other employees needed access to those documents."*
>
> David Davies, Manager of Information Services, Wodonga City Council

This dispersed storage system meant there was no guarantee that all documentation on council projects was being considered when decisions were made. With more content added to files and cabinets every day, the pressure was increasing to find a better way to organise it.

Wodonga City Council needed a system that was easy for employees to use and integrated seamlessly into its existing IBM Lotus Notes desktop environment. With strict legislation governing how Australian councils create, manage and protect public documents, it was crucial that the records management system ensured the council's compliance.

"Staff were familiar with the IBM Lotus Notes interfaces having used it for email and calendaring," said Davies. "Our focus is on managing Wodonga Shire, not on managing the fall-out from unfamiliar technologies."

An increasing number of Wodonga City Council employees were working from home or from offsite locations. "We needed to provide them with secure access to our corporate intranet and a reliable web access feature for email," said Davies.

A simple and responsive document management system

Wodonga City Council worked with IBM Business Partner† BluePoint to integrate a range of document and email management systems into the council's existing IBM Lotus Domino platform. The system is able to determine which staff are involved with specific projects and forward alerts, new processes and key documents accordingly.

> *"The council wanted minimal change to users' operating environment. BluePoint Content Manager sits on top of IBM Lotus Domino and can be accessed through the Notes client so it was a perfect technology fit."*
>
> *Craig McLaughlin, Lead Consultant at Bluepoint.*

Following the successful deployment of the content management system, the council rolled out additional modules to centrally store and manage other resources such as email and to track the location of physical records.

"After emails are sent BluePoint Email Manager asks the sender to determine whether or not the message is a record that requires capturing," said McLaughlin. "This helps manage the risk associated with the use of email for business communications."

Physical content such as paperwork and boxes are tracked via Blue Point Records Manager, which determines whether they should be preserved or destroyed. The council's policies, procedures and ISO documents, critical for maintaining records compliance, are managed through another BluePoint module called Quality Manager.

The council has also launched an intranet site that provides links to the most used internal applications and the latest council news. A customised application called Bright Ideas gathers staff input and ideas and feeds them back into council processes.

"Employees from all departments are able to contribute to the bigger picture," said Davies.

Staff working remotely can use the secure web access function built into IBM Lotus Domino to access email and intranet services.

Documents, email and bright ideas all in one place

"All files, documents and emails are in one place, meaning the intellectual property surrounding any given project can be accessed immediately by those who need it," said Davies.

"Incoming email is incorporated too, for example an email from the public website about a pothole in the street. The risk of overlooking community involvement such as this has been much reduced."

The system's electronic search capabilities save a lot of time and effort, said Davies.

"We can search company-wide across all documentation going back many years. And since it is accessible through the familiar, user-friendly Lotus Notes environment, staff are confident and comfortable using the full range of features."

David Davies, Manager of Information Services, Wodonga City Council

With simple automation and prompts for corporate records, there has been a considerable cultural change in the use of records management at Wodonga City Council. "Some staff used to horde documents in their email databases and avoid the BluePoint corporate repository altogether, but now they are happy to use BluePoint for central storage" said David Davies, Manager of Information Services at Wodonga City Council.

By acting as a launch pad to key applications, the intranet has also helped boost efficiency at the council.

"Staff can use email and access documents, an in/out database, a general noticeboard, IT help, quarterly reports, and access search engines via the intranet home page. It has also been successful in reflecting our vision and values, and providing Executive feedback which is great for communication, team morale and direction," Davies said.

The council's focus on innovation and improvement, gave rise to the Bright Ideas database. "IBM Lotus Notes' inherent flexibility enabled us to develop this unique application which allows the council to promote a culture of feedback and to collectively gather ideas," said Davies.

Automating check-outs

Wodonga City Council remains open to adopting new technologies to help with document management and is implementing BluePoint Records Kiosk.

This system makes data collection faster and easier by using wireless barcode scanners to log physical records.

"The barcode gun and the database are integrated, meaning staff can check folders in and out of the council's storage room without the need for a records officer. This process generates a receipt which is then emailed to staff."

The council was also eager to create customised user profiles for its staff intranet. For now, however, the new system was covering all bases, Davies said.

"Our collective corporate memory is captured using this comprehensive document and records management system."

For more information

Please call **132 426** in Australia or
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