

Colchester installs Idox's Corporate EDRMS



Introduction

Colchester Borough Council, in Essex, is Britain's oldest recorded town and its first capital. It is both a garrison and a university town. Colchester is relatively affluent, with a fast growing population of 156,000.

There is low unemployment (2.34 per cent), but there are pockets of deprivation. Four wards are among the most deprived in England (one in the top 10 per cent and three in the top 30 per cent) with low adult numeracy and literacy, high unemployment, low income levels, health problems and the highest child poverty level in Essex.

The key challenges and opportunities for the Council are a rising population, a buoyant economy and major regeneration of the Borough.

Colchester Borough Council remains an 'excellent' Council in the CPA assessments and, as such, constantly strives to improve service delivery. In line with e-Government requirements, in 2003 the Strategic Plan identified a more customer-oriented approach to delivering services and a streamlining of the property portfolio. Consequently, Colchester established one of the largest call centre operations (with around 60 staff) within local government. The call centre application selected was Siebel.

This cross-cutting approach to Citizen First also highlighted the need for corporate access to documentation alongside structured data regarding citizens and properties that Siebel and back-office systems would hold.

The project

Idox group was successful in winning a contract for the Planning and Housing Electronic Document and Records Management Systems (EDRMS) in early 2004, with a decision to go corporate in 2005. The solution was procured through Bull; a G-Cat supplier and procurement partner of Idox group.

Colchester purchased a site license to cater for over 900 staff and partners, including the ALMOs and LSP.

Colchester developed the business case themselves and Idox group demonstrated capabilities to meet the objectives of the project including:

- Corporate-wide implementation methodology
- Economic business case
- Compliance with internal interoperability policies
- Integration with Siebel CRM
- Fast and smooth deployment of software
- Minimal training requirements
- Services to develop taxonomies with the corporate data plan

"We don't see IDOX group as a normal supplier – more as a partner."

Phil Pettit, ICT Programme Manager, Colchester Borough Council



Case Study

For further information on how the Idox EDRMS could help your organisation, please contact: marketing@idoxgroup.com.

Phased approach

The project began initially with a sizeable component of pre-planning, analysis, capacity planning and scenario testing. After analysis of the Colchester data management policy and an impact assessment of inter-dependent applications, Idox group Information and Technical Consultants worked to design corporate document management categories (electronic filing cabinets) which are the basis for user access and security to the information assets.

The establishment of specific metadata that could be used corporately, including a UPRN (Unique Property Reference Number) and a UCRN (Unique Customer Reference Number), would ensure that enterprise-wide search across the repository would be feasible. This approach was an amalgamation of the direct outcome of the corporate call centre project and the need to rationalise accommodation for the Authority.

Prior to this, Service areas operated in silos and back-office staff retained the knowledge regarding information assets. This corporate policy therefore unlocks these assets and makes for joined-up working so that call centre staff can operate on behalf of many service areas.

Priority service areas

The Service areas identified as benefiting from initial delivery included Planning, Building Control and Housing as very paper-intensive departments. Idox group therefore implemented the Document Management Module, People-Based Workflow and Knowledge Management Module to these departments and to CRM staff. The tools for scanning and storing electronic files and images meant that staff had immediate access to electronic documentation alongside back office systems, including:

- > Siebel
- > MVM
- > Academy

The Housing department repository, split over nine categories, ensures all information relating to waiting lists, tenancy agreements, property and maintenance records are easily accessible across the various office locations, as well as remotely. As the Housing stock has now been transferred to ALMOs, the scope for joined-up working has also been widened and Idox group has been an important enabler in this change of policy/ procedure. The ALMO has found it very helpful to have access to records regarding tenancy arrangements and historical property maintenance held by the Council.

Public access

The Pendleton Criteria for the provision of Planning Services added impetus to deploy the Idox Web Access Software quickly. Members of the public and consultees are now able to make, pay for, view planning application documents and submit online comments and objections to the planning officer dealing with the case.

Back scanning

The limitation on accommodation for storing paper files was another important driver for this project. Therefore, in parallel with the software delivery, Colchester entrusted Idox group with the task of managing the historical back-file conversion project. Over 26,000 Planning and 2,000 HR and Payroll folders are being captured for input into Idox. The bureau selection, work scoping, project management and data migration process was also contracted and managed by Idox group.

Key to successful projects

The success of this project was the partnership structure based on a strong project management approach where the team included an Idox group Project Manager, a Colchester Project Manager and a Serco Account/Project Manager.

The success in the initial departments provided the impetus to roll out the software to every other service within the authority.

"We planned a very careful corporate EDRMS implementation – our expectations have been exceeded in terms of user acceptance and confidence with electronic ways of working."

Phil Pettit, ICT Programme Manager, Colchester Borough Council

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