

## Case study

# Government of New Brunswick accelerates information access



## HP Records Manager gives staff instant access to vital information from their desktops

### Industry

Public Sector

### Objective

To improve efficiency by making information easy to find and accessible from desktops, while reducing the amount of physical space required for storage

### Approach

After evaluating a number of enterprise record management solutions, the Department of Finance deployed HP Records Manager (formerly known as HP TRIM) as a single electronic document and records repository. Information was made accessible through in-house developed line-of-business applications

### IT matters

- Reduces maintenance period for paper records from 7 years to 90 days
- Eliminates manual processes by creating containers and folders automatically
- Simplifies access to documents which are now available at the click of a button
- Provides better control and auditing of record access and modification

### Business matters

- End user workloads reduced by approximately 30 percent
- Information accessible in seconds rather than hours or even days
- Business context maintained by allowing application forms and supporting documents to be stored with client folders
- Physical storage requirements dramatically reduced



**“As leaders in performance excellence our government is continuously looking for opportunities to improve productivity and drive down costs. With the HP Records Manager solution we have succeeded at both goals and improved customer service at the same time.”**

– Dany Couillard, executive director, Program Delivery Branch, Revenue and Taxation Division, Government of New Brunswick Department of Finance

### HP Records Manager helps Department of Finance improve efficiency

Knowledge workers at the Government Department of Finance in the Canadian province of New Brunswick were taking hours or even days to access the information vital to their day-to-day activities. Today HP Records Manager provides instant access to crucial information from inside of line-of-business applications on the desktop.



## 30 percent increase in end user productivity



### Challenge

#### Information increasingly critical to the department

Information is one of the most important assets of organizations today; the services they deliver depend on it. They need to be able to handle the ever-increasing volume of records efficiently, and provide timely access to information.

Canada's Government of New Brunswick is no exception. Its knowledge workers have become increasingly dependent on easy access to critical information in the course of their daily activities.

The 200 members of staff in the Department of Finance manage the province's public finances. The services they deliver – from tax refund programs to a low income credit program – are crucial to citizens across the province, while revenue collection – including property tax and consumer taxes – is crucial to the province's economy.

#### Labor-intensive processes make for inefficient service delivery

The department's programs are very popular with its citizens, but time-consuming to manage. Traditionally it used labor-intensive paper-based processes to store, manage and access information. A decentralized environment had led to inconsistencies and duplication.

Pat Burns, manager in the Information Management and Technology Branch of the Department of Finance, reveals: "Similar fields were named differently across forms and there was a myriad of ideas about how these should be managed. Pending, closed and denied applications were arranged by status rather than applicant, the method of filing was not consistent, and more rigor was required."

The department was struggling to deliver on its commitment to provide courteous, effective and efficient services to its citizens. Not only was finding the right information labor-intensive, worse still, customer service levels were severely impacted with workers not able to find information quickly when answering calls.

With a new rebate program planned, the Department of Finance recognized it needed to act. "The new rebate program had a long-term storage requirement for retention," explains Burns. "It was going to require a significant amount of shelf-space and effort to manage it using our paper-based processes and there was a significant amount of money at risk if we didn't have the correct information."

### Solution

#### The best product delivered on time and within budget

The department examined a number of enterprise-class solutions during their search for a product for managing their information. Vendors were told the department wanted a good solid product that was not going to complicate lives. "We are accountable to our citizens. We have to make technology work for us, to improve our efficiency," Burns notes. "So we wanted a product that could be configured in such a way that was very easy for the user and easy to write procedures around."

The Information Management and Technology Branch knew HP Records Manager was reliable and would be relatively simple to implement. The team was already familiar with the product, having previously implemented a system for the Executive Council Office.



Burns and her team completed the implementation in just nine months with support from HP Partner, Prima Information Solutions Inc. (Prima), a leading expert in the field of Records and Information Management across Canada.

Today, two records workers use the solution for inputting 900 to 1,500 records each day, four senior level managers use it for approvals and up to ten knowledge workers use it for accessing the information that is crucial to their daily tasks.

#### **A highly extensible solution**

The department has taken advantage of the extensibility features of HP Records Manager. Using WebDrawer web services, documents can be viewed in the native Rebate System (IR), an integrated line-of-business application, developed in-house many years previously. Burns adds: “The knowledge workers don’t need the full interface, but they do need to view documents. They just click a button on the rebate application screen and they have instant visibility of whatever documents they need from their desktop.”

Her team also developed an application that takes advantage of HP Record Manager’s ability to organize information automatically. Burns reveals: “Any time a new client or transaction is created in the Rebate System, all the necessary record types and folders are created automatically in HP Records Manager.”

#### **Automatic upload of legacy data to new system**

A new property tax system (GEMINI) is currently being developed for the province. It will take advantage of HP Records Manager. The legacy system consists of 450,000 folders of microfilm records – one for each of the program’s clients.

Taking advantage of HP Records Manager’s extensive and intrinsic metadata and tools provided in the software development kit, the team wrote a program that automatically creates containers and folders for the legacy records. Eliminating time-consuming and resource-intensive human intervention not only improves efficiency, it also eradicates errors. “All the record types have been created in HP Records Manager with all the correct metadata,” describes Burns. “Previously the output from the Property Tax System was printed, microfilmed and placed in client microfiche jackets manually. Now it is automatically uploaded from Gemini to our document servers, populating the folders and containers for these property tax owners.”

Once the new system is live, users will be able to view records through the native GEMINI line-of-business application using HP Records Manager web services, much like in the Rebate application.

## **Benefits**

#### **Instant access to vital information**

By reducing the time to access information from anything between two hours and four days to just a few seconds, HP Records Manager has significantly improved productivity. “Knowledge workers don’t have to wait while a records worker retrieves the folder they need. And they don’t have to search through the four or five years of records to find the batch they need. Now, it’s instant and on their desktops,” articulates Burns.

## Customer solution at a glance

### Software

- HP Records Manager 8 (formerly known as HP TRIM)
- Trapeze Capture for HP Trim Pro

HP Records Manager's classification capability has also helped make finding information simpler and quicker. Previously the department was not able to file an application with the applicant's file. Each time they needed to access a record they had to manually sift through four or five years of records, or even call for retrieval from off-site storage, to find the batch they wanted. Burns adds: "Now, it's instant. On the application system there's a button that says 'view documents' where you can view all the documents for that particular transaction."

### Processing time streamlined

The Department of Finance has streamlined the processing time with a documented approach. Burns adds: "Employees no longer have to create folders and vouchers or do any manual indexing because everything is done through HP Records Manager."

Burns estimates that the record processing workload around the new property tax system will also be reduced significantly, possibly halved. Documentation will be sent directly to HP Records Manager, eliminating the need for microfilm processing and microfiche jacket preparation and insertion. The only other additional costs for this project are hardware. As the demand for scanning increases, the purchase of heavy duty scanners was necessary.

"Having instant access to the documents I need will avoid delays in adjustments as the old system of retrieval was time consuming and labor intensive."

— Debbie Forbes, supervisor and tax analyst, Revenue and Taxation Division, Accounting and Refunds Branch, Government of New Brunswick  
Department of Finance

### Freeing up office space

Now the department relies totally on the digitized records, allowing it to reduce the amount of time physical records need to be stored from seven years — or even 20 years for some programs — to 90 days. The Department of Finance believes that HP Records Manager will yield considerable savings because it will use less physical files and need to store fewer physical documents.

Burns reveals: "We used to send a lot to off-site storage, which we don't have to do now, and we're no longer buying expensive expanding folders at approximately five dollars per folder. With an estimated 400 folders purchased for rebates, the cost savings in supplies alone is approximately \$2,000. There are a lot of savings everywhere."

### Improved Job Satisfaction

In the records management office the records management staff are extremely satisfied with the new processes put in place. Physical records are systematically destroyed 90 days after scanning takes place. Judy Hay, records officer, Revenue and Taxation Division of the Department of Finance states, "Is scanning better than filing? It's 100 percent better. This new process established for the rebates system is simple to operate and makes quality control easy to perform."

The solution has had a significant impact on the team in the Department of Finance in many other ways. They are now able to search documents using keywords, add additional information to applications, manage who is able to view and who is able to update information, scan historical applications and view them through the Rebate application, and much more.

"What we have is very, very good and it works well. We can take what we have learned and apply it to further opportunities to integrate HP Records Manager with other line of business applications to manage our information resources," concludes Burns.

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