



## ● Centralised document management delivering increased process efficiency ●

### The Background

North Yorkshire is the largest county in England, covering more than 8,500km<sup>2</sup> – with a growing population of approximately 600,000 people and a healthy economy. It includes the towns of Harrogate, Scarborough and the county town Northallerton.

### The Requirement

North Yorkshire County Council (NYCC) was finding it increasingly hard to provide staff with efficient access to information, especially those based at remote locations.

HR and personnel information was spread across the County – with the central HR team holding standard information such as contracts of employment, while local managers held details such as absence notes. There were also various admin support teams holding details, meaning information could be in one of three places, or even all three places! Which brought an added complication of version control.

Richard Connor, Employment Support Officer explains further:

*“We recognised the need for an Electronic Document Record Management solution, which would give us the ability to centralise information and provide good governance. We also had a growing demand for more storage capacity as information volumes increase, and an overriding need for cleansing – to remove duplicates and manage versions.”*

### The Challenge

The implementation of the new EDRM solution for the HR department was part of an enterprise-wide initiative to transform the Council. The initial phase was carried out with the Special Educational Needs team, followed by the HR team. The aim was to streamline processes, increase efficiency and provide immediate and relevant access for everyone, regardless of location. Richard continues:

“A major objective was to change our way of working, by using the solution effectively and developing workflows, promoting self service for managers and reducing the support requirement from business support. The overall objective was to increase efficiency and compliance, reduce risk and provide better data protection.

We needed the solution to handle all our retention and disposal policies, managing the process for us so we could meet the legal requirements to dispose of records at the right time. We also needed to offer various levels of security to different staff members, and update these in an easy, manageable way.”





## The Solution

NYCC selected their EDRM solution through a full tender process, requirements included the need for information to be legally admissible, and to meet all necessary Data Protection requirements.

Wisdom now provides document and records management to hundreds of sites across the county, with access for 1,000 managers, supporting around 20,000 staff. This enables all managers, even those working remotely, to have direct access to the information they need. It is also used by a team of 90 people that provide advice on HR, legal and employment legislation – and the employment support teams, including payroll and administration services. Michaela Lowe, Systems Development Officer explains how Daisy supported NYCC through the Wisdom implementation:

“Daisy provided a week’s offsite training for staff, to familiarise them with the concept of EDRM and Wisdom in particular. This was augmented with a workshop to agree configuration of the file plan and the overall solution. We now have ‘super users’, so that business areas can provide training for their own new staff – with Daisy able to provide additional training if needed.

As new features are released, guidance is provided by Daisy, then one of our team members provides training to managers. Our test system enables users to gain experience – although many staff are not even aware they are accessing a separate EDRM solution, due to the integration with our HR solution!”

Following the initial implementation, NYCC has planned another review with its managers, to develop the solution further as adjustments in the Council’s ongoing processes are made.

## The Results

NYCC now has instant access to information wherever the user is, including mobile users such as the building, cleaning and catering staff who cover multiple locations. Wisdom has removed duplication, and gives assurance that only most

up to date information is used. It also provides all the levels of security the Council requires, including for the highly confidential information of the Occupational Health team.

At a wider level, Wisdom has been integrated to NYCC’s ResourceLink, Synergy and scanning solutions – while also supporting the overall ‘Modern Council’ agenda. Richard continues:

“We knew the solution would be beneficial, but we hadn’t realised how useful the Wisdom Explorer view would be, overtaking the MyView integration. Additionally, having the default document taking on all the metadata, and the capability of declaring all documents as records, has been really useful.”

Another key benefit has been the ability for managers to take on more administrative tasks, which could have caused resistance, but with the Wisdom solution and workflows in place, the process is far more intuitive, and managers have made the transition easily, as Richard concludes:

***“By incorporating workflows, which take managers through a step by step process, we are able to delegate more responsibility to them, which has been very beneficial. The integration with the workflows has transformed our efficiency, with all processes now being managed and stored automatically. For example, the attendance management process was very lengthy, but putting it into Wisdom and using workflows has increased the efficiency dramatically.”***

## About Wisdom

Wisdom EDRM provides complete lifecycle management of documents and records, both electronic and paper using a contemporary technology platform that seamlessly and invisibly integrates with line of business systems throughout the organisation.