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CASE STUDY

Tourism WA

Tourism WA tackles information challenge

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In-house or outsourced, cloud or on-premise? Tourism WA, the State Government agency responsible for promoting Western Australia (WA) as a holiday and business event destination, went through the typical scenarios when questioning how to future-proof its information and records management systems. It has now completed an upgrade to HP's latest version Records Manager 8 with the assistance of Information Proficiency, which has been providing a Records Management team since 2011.

Around five years ago tourism was targeted as a growth area for the state and major effort placed into marketing and infrastructure for events. The importance of the tourism industry in Western Australia is illustrated by current data that shows it employs more than 57,000 people (4.3% of the State's workforce). In 2013 overnight visitors spent \$A6.1 billion in Western Australia.

As a long term TRIM user, Tourism WA went to market to ask for recommendations on a path to take it forward into the digital future. The organisation has over 120 users operating in the Microsoft Office and Windows environment.

Management usually has a number of reasons to consider outsourcing: it enables remaining staff to focus more on their core functions; it may reduce ongoing operating costs; there may be service quality and stability improvements; and management control is usually less onerous.

Dean Lockwood, Chief Information Officer at Tourism WA, specifically prefers the outsourced model. Information proficiency now provides the agency's full RM team that includes a Records Manager, Records Co-ordinator and Archivist.

"At the time we went to market for a service as this model has worked well for us across a range of areas including technical development for our web sites and facilities management.

"We had a functioning framework, with the systems and processes in place, but there was an opportunity to leverage those systems to be more efficient in the way we manage information."

Information Proficiency provides Tourism WA with TRIM Administration as well as the development of a Recordkeeping Plan which needs to be updated every 5 years.

Other duties include development and review of policy and procedures, FOI investigation & response, records sentencing, TRIM training, File Creation, and physical file audits.

It is also providing scanning services and daily mail processing, recently introducing Kofax Capture for scanning incoming mail and a back scanning project using an in house Kodak Scanner i3200. Tourism WA has also implemented the Sigma Data products that integrate with TRIM, Logs inTRIM and Imports inTRIM. These products facilitate the ability to search and review the system generated audit logs of TRIM and the ability to bulk upload documents from shared drives into TRIM.

TRIM is integrated with Office to allow items to be dragged and dropped from Outlook or automatically captured. All staff email is archived via GFI Archiver, with links captured within Records Manager.

One project currently underway is seeking to embed the records management function more closely into business processes.

“At present it’s generally handled after the fact. For instance project teams generate a lot of email and documentation, and when it comes to the end of a project we would record that into TRIM. Clearly that’s not as efficient as it should be so we are working on having that integrated, so as the documents and records are created they are automatically captured and recorded,” said Lockwood.

“We have made great strides in this of late.”

One of the drivers of the RM8 upgrade was a need to also refresh the desktop environment to the latest version of Windows and Office.

“Information Proficiency & Sigma Data identified that RM8 could solve some integration issues we were facing,” said Lockwood.

“There are some functional enhancements to the system that were really attractive to us. For example, the streamlined user interface, better and more reliable integration with other systems (MS Office) and improved back office administration functions.”

Others contemplating a similar upgrade should not face it with too much trepidation, as long as the preparation is done right, observes Lockwood.

“We setup a test environment and used a non-sensitive subset of our production data, and allowed some of our key users to join the test. Once that was completed Information Proficiency assisted with the production upgrade which was done in an afternoon. I think HP have got that right, it works very well.

“Then the IT team rolled out the new client to all of the machines and our Records Management team went around the next day and made sure everyone was up and running and knew what was required, supported by some email and intranet communications that went out.

“We were going from the latest version so there were not any wholesale changes for users, it was really just getting comfortable with the new interface and the new system.

“We don’t have any issues with our staff working with TRIM, and I think that’s because we allow people to work with the existing systems that they are comfortable with and undertake records management through them. Users only need to go into TRIM directly when they need to find something.

“We don’t just see information and records management as a back office function. We try and engage with staff and drive a culture whereby they know how to use the system more efficiently and how it benefits them.

“There’s always more to be done but that engagement is crucial,” said Lockwood.

For further detail contact info@infoproficiency.com.au

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