



Success story

Kāpiti Coast District Council

Industry

- Government

Solutions

- OpenText™ Content Suite
- OpenText™ Enterprise Connect

Partner support

- Tectonics Group
- ATOS

Results



Improved collaboration and streamlined processes with one central repository



Enhanced productivity with intuitive interface



Kāpiti Coast District Council engages users with intuitive Enterprise Content Management

New Zealand government district increases productivity, builds unity with user-friendly OpenText™ Content Suite

"Everybody across the organization can see everything instead of having multiple copies of the same type of documents all over. It's just in one place."

Jeff Clement
Records Team Leader
Kāpiti Coast District Council



Known for its unspoiled beaches, the Kāpiti Coast stretches along the southwestern shore of New Zealand's North Island. As a popular destination for visitors from nearby Wellington, the Kāpiti Coast District is home to more than 50,000 residents and served by the Kāpiti Coast District Council.

Over the past decade, Jeff Clement, records team leader with the Kāpiti Coast District Council, has experienced the changing tides of records management, always pushing for reliability and ease of access. Most recently, the Council upgraded to OpenText Content Suite 16 as the single source of information for services spanning property management to licenses.

Swimming in records

"We do a lot of regulatory work," Clement says, as close to 330 full-time employees manage records for a variety of services. For instance, residents must apply for building and resource consents (permits) or food and alcohol licenses. Inspectors review documents, visit sites, write reports to process the applications, then, the Council must store records according to strict requirements.

Previously, methods to manage records proved problematic, according to Clement. While Council employees wanted to collaborate on related services, resources—including multiple versions of the same documents—remained in separate locations. **"When I got here, we were just using paper-based systems and file shares... anybody could create a folder,"** Clement says.

"We would end up with folders with all the same names or the same titles in different areas. People would be working on something and they might be working on the same document, but there would be five copies of that throughout the shared drives."

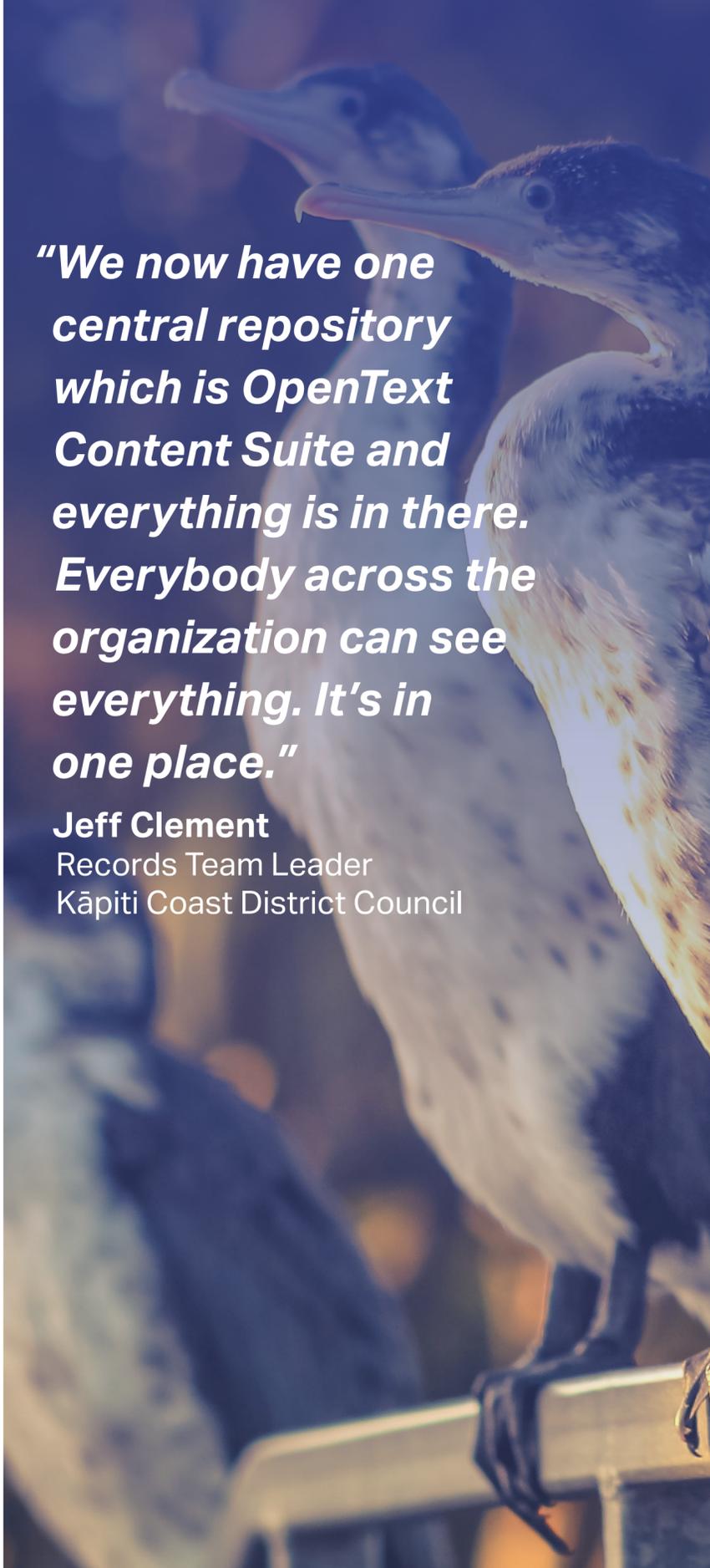
Disparate systems did not support compliance with the Public Records Act or other protocols required of public entities. **"Regulations put on the onus that we had to create and maintain the records of the Council,"** Clement says. **"You really do need a document management system to do that. A file share will never do it."**

Long-term ECM solution

In 2009, Kāpiti Coast District Council joined neighboring districts in New Zealand using OpenText enterprise content management (ECM) technology, working with Techtonics Group, an OpenText partner, to implement OpenText™ Document Management, eDOCS Edition (eDOCS DM). Following years of service, the Council worked with ATOS, another partner, to implement Content Suite 16 to enhance user-oriented collaborative environments and to prepare for increased mobile use.

From the start, the digital repository for records reduced inefficiencies for the Council's regulatory group and other users. Maintaining a single library has made organization and collaboration much easier. **"We now have one central repository which is OpenText Content Suite and everything is in there,"** Clement says. **"Everybody across the organization can see everything. It's in one place."**

The same is true for districts across New Zealand, including Wellington, Palmerston North and Porirua, all of which pared down lists of possible document management vendors to OpenText as the preferred provider. Demonstrating technology integration with organizational culture and operations, each district created its own name for the information system powered by OpenText. Wellington uses "Trove," Palmerston North relies on "Oasis." Kāpiti Coast selected a more literal interpretation, with Every Document shortened to "ED."



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“Everybody personalized it,” Clement notes. **“We came up with a nice, short name, so users would know what we’re talking about when we say, ‘ED.’ ”** Furthermore, Council customizes its system with the Kāpiti logo on the banner and customized buttons to take users to favorite areas.

Migration to latest user-driven design

Kāpiti Coast District Council managed the transition to Content Suite 16 through watchful migration of half a million documents and a few straightforward training sessions. Metadata is now associated to close to 24,000 individual properties via a folder structure managed by the records team. **“In a proper document management system, you can control the folder structure a lot better,”** Clement notes. As documents are saved, they inherit the appropriate metadata.

The initial deployment schedule established four weekends for migration, though Clement and his team condensed it to three weekends. **“Some people have done a big bang,”** he notes. **“But, we really just didn’t have the staff and resources. The timeframe was perfect for us.”**

Intuitive, unified environment

Integrated, collaborative ECM came ashore for Kāpiti Coast District Council with Content Suite 16. **“The main benefit is our end-user experience. People can use this,”** Clement says. **“They can drag and drop into file folders. They can move things around.”** Users find and manage all building and resource documents as well as other district files in one location. They simply pull up a property to see all consents tied to the location with one glance.

For training, the Council concentrated on the Content Suite Classic user interface. Clement says the folder structure is familiar to users experienced with eDOCS DM. With time, and as the need for portable

access to content increases, they will transition to the Smart View UI with its role-based and workspace-oriented views across desktop and mobile devices. **“The Content Suite Classic UI is so intuitive and the Smart View is even better,”** Clement says, noting employees appreciate the icons and tiled design in the Smart UI since it echoes other online experiences. **“Users love it. That’s what they are using at home. The more we can do that, the better.”**

Unified content encourages unified collaboration, according to Clement. **“We’re one Council. We’re one team. We’ve now opened up the files to everybody. So everybody has got a part.”** While there are exceptions for senior leadership and human resources, in general, all users have full access to documents for sharing and editing. **“It just makes it so much easier. You don’t have to go and change the permissions on folders here, there and everywhere. It’s all there.”**

The Smart View UI will provide Content Suite users with a rich set of enhanced collaboration capabilities when aligned to business processes. Commenting and activity feeds will provide quick insight into what others are working on and provide a fast way to share updates, minimizing the use of email.

Tailored for productivity

Designed with the end user in mind, Content Suite offers an intuitive web UI, as well as alternate options such as Smart Views, OpenText™ Content Server Mobile, OpenText™ Connected Workspaces and OpenText™ Extended ECM to suit a variety of use cases. At Kāpiti Coast District Council, some employees still prefer the desktop, connecting to Content Suite through OpenText™ Enterprise Connect. **“That’s the nice thing about it,”** Clement notes. **“However you want to work, you can tailor to fit your needs.”**

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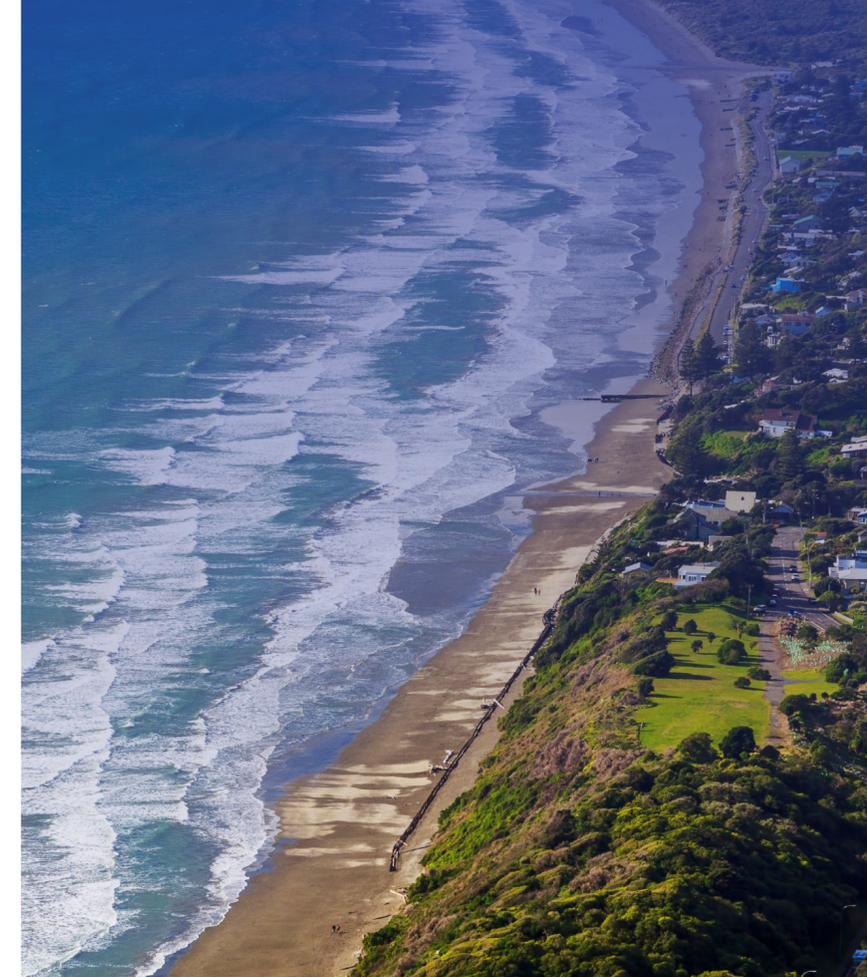


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As a result, users are pleased and productive. ***“Content Suite enables everybody to do so much more,”*** Clement notes. In fact, the records team is now devolving some record functions to team members directly, opening efficient self-service opportunities, such as creating folders on the spot.

Self-service will also be extended to citizens through the My Kāpiti Portal linked to Content Suite. To obtain drainage plans, floor plans and other documents, residents currently contact the call center with a service request. A records team member then selects the document from the larger property file for email delivery. In the future, Clement explains, the records staff will direct citizens to the website where they can log on and obtain property information directly. The records staff will regain hours every day to dedicate to other responsibilities.

The Council expects to add workflow to automate other manual processes, including mail routing and meeting agenda approvals. ***“There are going to be a lot of advantages and opportunities for us,”*** Clement says. ***“We’ve now got the latest and best: Content Suite 16 is ready and waiting. We’ll be able to lead processes going forward.”***



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