

	Victorian Office PO Box 260 Melton Victoria 3337 T (03) 9747 3077 F (03) 9747 6599	New South Wales Office 119 Willoughby Road Crows Nest NSW 2065 T (02) 8987 1926 F (02) 9439 2157	Queensland Office PO Box 4286 Eianora Queensland 4221 T (07) 5525 7733 F (07) 5525 7744	<h1>Case Study</h1>
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Case Study: Metropolitan Fire and Emergency Services Board (MFESB) - Victoria

1. The Organisation

The Metropolitan Fire and Emergency Services Board (MFESB), commonly referred to as the Metropolitan Fire Brigade (MFB), has over 1,500 professional firefighters staffing almost 50 strategically located fire stations and specialist departments around the Melbourne metropolitan area. The MFB is a community safety organisation committed to providing world-class protection from fire and other emergencies in Melbourne's major metropolitan area, it protects property valued at close to \$200 billion including vital community infrastructure and, during daylight hours, around three million people.

2. The Challenge

Records Solutions was engaged to assist MFESB in undertaking a comprehensive review of their records and document management operation and assist in selecting and implementing an EDRMS. The project had four clear stages, namely:

- Stage 1: Electronic Document & Records Management System (EDRMS) Feasibility Study - A comprehensive review of current record and document management practices to determine the feasibility of implementing an EDRMS.
- Stage 2: EDRMS Business Case & Implementation Strategy – Development of 2 critical documents to secure project funding and provide a high level strategic guide for the implementation of the chosen system .
- Stage 3: EDRMS Tender Specification Development and Selection – Development of a User Requirement Specification (URS) for an EDRMS to be used for the selection and purchase of an appropriate system. Included bench testing and evaluation of selected product.
- Stage 4: System Implementation - Project Management (using PRINCE2 methodology) of the EDRMS Pilot Implementation.

3. The Process

The following outlines what was achieved and the outcomes of this project:

Stage 1: EDRMS Feasibility Study

At the time of undertaking the Feasibility Study the MFB operated a Records Management System (TRIM Captura) which was effectively managing the hard copy records of the organisation. Before embarking on the path of electronic record keeping it was therefore

important to understand the real benefits that could be derived from an EDRMS implementation and equally importantly that the organisation was culturally and operationally ready for such a system.

The scope of the Feasibility Study included the following:

- To conduct a study of nominated business areas within MFB for the purpose of identifying specific business needs and priorities for document management;
- To review existing transactional and information systems for the purpose of assessing system capabilities with regard to meeting business needs in document management;
- To assess the interdependencies between traditional records management, electronic document management and permanent long term preservation of records;
- To conduct a market survey for potential products and developments which may be of assistance to MFB in the implementation phase; and
- To conduct an analysis of organisations that has achieved a successful EDRMS implementation.

The Feasibility Study was successfully completed with the key recommendation to proceed with the implementation of an enterprise-wide EDRMS.

Stage 2: EDRMS Business Case & Implementation Strategy Development

Having determined the feasibility of an EDRMS, Records Solutions was engaged to develop a Business Case and Implementation Strategy. The Business Case was to include a minimum of 3 options for moving forward and these were to be fully costed and risk assessed. The Implementation Strategy changed focus (at the MFB's request) throughout its development and ultimately ended as a high level Project Management Plan. These 2 key documents included the following:

Business Case

- EDRMS support for MFESB business strategy;
- EDRMS support for 'IT&T' strategy;
- Risk management;
- Identification of infrastructure implications;
- Identification of organisational implications;
- Identification of financial implications;
- Identification of human resource implications; and
- Cost benefit analysis

Implementation Strategy - prepared as an overarching guiding document that included strategic decisions and project governance, the document included:

- Project goals and objectives;
- Proposed approach;
- Project organisation details and responsibilities;
- Project management (phases and milestones, project deliverables);
- High-level management of project and system;
- High-level project plan;
- Project communication;
- Change management strategy;
- Training strategy; and
- Data migration strategy

The Business Case and Implementation Strategy was successfully completed and the project received appropriate funding.

Stage 3: EDRMS Tender Specification Development and Selection

This step involved preparing a Tender Specification that identified the functionality required by MFESB in terms of an effective records and document management software solution.

Specific tasks included defining the system functionality; Tender Evaluation Criteria and Methodology, providing a summary of MFESB expected outcomes of the project, defining the present Information Technology environment; clarifying training and vendor implementation and support requirements; and clearly establishing appropriate licensing (400 seats), system audit and Quality Assurance requirements.

After 4 exhaustive evaluation rounds and protracted contract negotiations the system chosen was Open Text's eDocs (formally Hummingbird Enterprise) and Kofax for scanning.

Stage 4: EDRMS Implementation

With our background and expertise in Records and Information Management, including many different EDRMS implementations, Records Solutions' role in the implementation was that of Project Management and the provision of specialist records and document management advice. The initial implementation was developed and deployed as a pilot involving approximately 80 staff. Key issues that need to be addressed included, amongst other things:

- change management and communications (management of stakeholder expectations);
- integration with "non standard" applications;
- data migration from TRIM and network drives;
- highly detailed User Acceptance test scripts;
- staff understanding and use of Business Classification Scheme;
- levels of training for different types of users;
- business impact analysis and evaluation;
- business rules for data entry etc.

Subsequent to the pilot running for 3 months, an independent review was undertaken and alterations made to the deployment methodology before the broader organisational deployment began. The system is now well accepted and is under a regular monitoring and enhancement regime that is designed to ensure the system continues to meet existing and new organisational requirements.