



A Case Study of the Trinity workFile Implementation



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The Company

Trinity Community Centre, also referred to in this document as Trinity, is a charity based organisation that serves the community offering various different schemes for its members. Many of these schemes are aimed at helping immigrants in settling in the local area and to help them build a new life here in the UK.

Trinity has many members of all ages, origins and genders. The centre monitors and advises its members offering support, information or help for the individual circumstances. Approximately 16,000 people use Trinity on a monthly basis.

Trinity are also involved in various projects such as 'Childcare and Youth', 'Educational', 'Creative and Cultural' and 'Project DOST'. 'Project DOST' offers specialist, individual and long-term support to children who have arrived in the UK as asylum seeking unaccompanied minors.

Trinity believe that all children have the right to good quality education, healthcare and housing and are committed to empowering them to access their full statutory entitlements. 'Project DOST' provides a holistic educational and creative programme which offers a safe space for children to improve their self-esteem, self-confidence and develop friendships. The project was established three years ago and has grown from a single project with two part-time staff working with 15 children, to a project which now has 5 full-time, 1 part-time and 5 freelance staff and supports more than 150 children a year. Project DOST is a European-wide project.

The Problem

The Trinity centre had a vast amount of correspondence and paper based records, all filed manually in tangible storage devices such as filing cabinets. The manual system was very time consuming to maintain, files were sometimes miss-filed, reducing the overall effectiveness of the system, and due to the sensitive nature of the correspondence a structured security scheme was difficult to implement and govern. This problem was only compounded as the volume of correspondence manually filed increased for the ever increasing number of members.

Free hand notes and non paper based interactions such as telephone conversations were never truly captured and stored with the manual member file. This meant that often vital information was overlooked or work was carried out more than once.

In addition, Trinity to gain funding for the next financial year, has to prove how effective its services are to the community. Submitting end of year reports on member's progress and reports based on given groups of members was increasingly hard. Often many success stories were overlooked, having a negative impact on the centres funding for the following year, and therefore a negative impact on the amount of members the centre could service.

The Solution: workFile

One Degree Consulting Limited, also referred to in this document as One Degree, have a wealth of experience implementing Document Image Processing (DIP) and Document Management (DM) solutions for blue-chip type organisations in the business, finance and insurance type sectors of the market. DIP can also be referred to as EDMS (Electronic Document Management System). DIP or DM systems enable organisations to store, retrieve and archive files and other correspondence electronically in a centralised and ordered manner. The information is safe, reliable and easy to find and up to date.

A one degree consultant was commissioned to carry out a consultancy based project that looked in detail at the problems of the Trinity community centre. In addition a feasibility study was undertaken to ascertain if a DIP or EDMS system would help Trinity and if such a system was financially and physically feasible. This consultancy project highlighted the requirement for a full DIP system, but also a requirement for a structured Records Management solution with the ability to store notes and interactions against member records.

Records Management is a term used to store, manage and maintain structured electronic data. This means information that can be captured and entered electronically forming an electronic record. In the case of Trinity, this was to be used to store member information, such as the members unique ID, their name, address, ethnic origin etc. In total Trinity required a records management solution to store some 75 individual pieces of data for a given members record.

The findings from the consultation project lead one degree to advise on an appropriate EDMS / DIP system that could best fit the requirements of Trinity and fitted in with their budget constraints. Trinity reviewed the findings of one degree and chose the one degree workFile product suite, as this could best model their requirements and be delivered quickly within their available budget.

The workFile product suite is a product written by One Degree. It has numerous modules that provide the functionality of and DIP or DM solution, storage and archive solution and a complete records management solution.

A functional specification was drawn up, from which a modelled solution was created within workFile. The workFile product suite has a modelling tool that allows complete solutions to be designed, architected and modelled allowing actual usage of the modelled solution. From this model any addition integration areas, business rules and bespoke application development can be built up.

The modelled Trinity environment illustrated that for efficiency, it was important for users to have a bespoke records management interface. This was primarily due to the amount of data captured electronically to make up the basis of a members file. In addition this allowed a process management / wizard interface solution in building electronic / capturing data for the electronic records.

Again for ease of use, a bespoke interface was created to allow the quick and easy building of reports that were key to the survival and funding of Trinity. Trinity specific business rules were added through the workFile business operations layer, allowing workFile to only be operated in accordance to the business rules set within this layer. The bespoke interfaces were the only areas of bespoke development.

The workFile records module was used to provide a complete records management solution that was quickly configured and modelled for the requirements of Trinity. The interfaces also took advantage of the workFile content module, allowing electronic documents to be stored,

viewed, exported, printed and securely managed. This included the capturing of faxed documents, scanned documents and other un-structured data formats, such as audio, video, eMail etc. Finally the workFile crm core module was utilised to manage interactions and record notes created. The crm module allowed all interactions to be captured and noted against a member, building up a complete 360 degree view of the member's interactions and details held at Trinity. In addition it also gave the functionality to review a complete audit history of each and every interaction between the centre, and its members and importantly which staff member carried out that interaction.

The complete solution was implemented on time and within budget and has exceeded Trinity's initial hopes. The vast amounts of time and space saved by the solution has allowed Trinity staff to carry out and concentrate more on providing the services they need to, to the members that need them most.

Conclusion

The workFile solution and its bespoke interfaces saved vast amounts of time spent on mundane tasks and administration. It is estimated that each staff member has over 2 hours saved from implementing the workFile solution.

Budgetary reports, progress reports are now completed in a matter of seconds, illustrating quickly the success stories, areas of improvement and the performance of the Trinity centre.

The workFile records module has allowed Trinity to quickly locate, maintain and report on all of its members. In addition the workFile content module has allowed all correspondence to be quickly captured, assigned to the correct member, located and viewed to the correct staff members while maintaining a high level of security and audit functionality.

The solution has allowed Trinity to not only save money on administration tasks, but to also provide them with more time to carry out tasks in servicing the community and the centres members. The system is saving the centre money, has improved efficiency, has increased its records and correspondence accuracy, data security, use of physical space and most importantly given its staff the ability and freedom to do their jobs better. All of these improvements have given the centres members a better experience and has allowed them to benefit even greater from the services provided by Trinity.