

Aiimi Solutions for Local Government

Document Management for Chief Executives

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V1.0





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1. Introduction

1.1 Overview

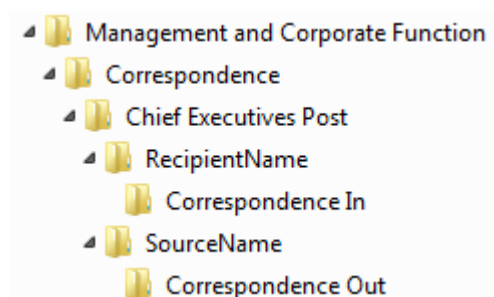
Aiimi Local Government solutions are designed to accelerate the deployment of line of business solutions on top of corporate EDRMS platforms, thereby increasing the value of the investment beyond the typical use cases of reducing physical storage and increasing compliance. Each department within a council has specific and unique information management requirements that our solutions address. Aiimi solutions can be used as pre-packaged drop in products, or the basis for a bespoke solution. Aiimi's Document Management for Chief Execs allows councils to capture, store and manage the inbound and outbound correspondence that flows in and out of the council on a daily basis, as well as track responses and report on performance in what is a highly political area of the councils operations. The solution also allows the council to work with documents sent in by email and to access that information through the standard Office and Outlook applications as well as to publish appropriate open information to the council web site and thereby improve interaction with the public.

2. EDRM Solutions for Chief Execs

Inbound and outbound correspondence between the chief executive of a council and an MP, citizen or business often has a time critical nature and should be tracked through to response. Often correspondence is an escalation of a matter being dealt with elsewhere in the council and therefore can be politically sensitive. All correspondence needs to be filed against the post and the person in the post at the time and tracked with any response recorded. Any EDRMS should be able to report on the volumes and state of chief executives correspondence in order to help the council achieve good turnaround in this area. Workflows manage the process of relating outbound correspondence to inbound and ensuring that the councils own KPI's for responses are met, prompting the chief exec or members of their team with actions at appropriate points.

2.1 File Plan

The file plan for the chief executives function sits within a pre-built standard folder structure that is based upon the Local Government Classification Scheme (LGCS) and incorporates subdivisions in the folder structure to divide correspondence up by recipient, source, inbound and outbound.



The example above shows a project folder with the post and then the recipient or source placeholders which would be replaced with the name of the staff member in post at the time.



The solution automatically generates the filing scheme shown above when new correspondence comes in, and this is based upon a template that applies security and metadata (business / surname, date in, response issued date etc) to the correspondence folders, these attributes then become mandatory on all correspondence stored in the filing structure.

This allows a standardised method of navigation through all current correspondence, which can be extended to cater for your council's unique requirements. Aiimi's standard implementation also includes a dynamic 'faceted view' on your content which uses the scheme metadata to filter the view. Using a faceted view allows you to restrict the correspondence shown to only those not yet responded to, or only those in the current year for instance.

2.2 Scanning and Digital Mailroom

Two scanning 'profiles' are provided with the solution, which allows mailroom or chief executive team staff to quickly scan information to the correct location and fill in the required metadata to route the scanned document to the right person for action. Scanning profiles are included that cater for:

Chief Executive - Correspondence In
Chief Executive - Correspondence Out

This reduces the time and effort required to file incoming correspondence as well as increasing the accuracy of the filing process and allows the council to distribute the task of filing documents to the office of the chief executive's document repository outside the department if required.

2.3 Workflows

Once correspondence has been scanned into the Chief Executive's document repository, it is automatically attached to a workflow, which serves a number of purposes by default, but can be adapted as required.

1. The workflow creates the appropriate folders if they do not already exist;
2. Assigns the appropriate metadata;
3. Routes the document to the appropriate person in the office of the chief executive;
4. If contact details are available, alerts the sender that their correspondence has been received
5. Provides alerts if correspondence is not responded to within 31 days and reminders 10 days prior to that.
6. Updates the EDRMS to mark correspondence that has been replied to

The solution is based upon OpenText Content Server, which includes a flexible workflow engine that allows simple process modelling and easy amendment of workflows to suite the requirements of an individual council.

2.4 Reports

The management of this correspondence requires the provision of a set of reports that can be used to audit the performance of the council in responding to inbound chief executives correspondence. In addition by using full text search indexes, the solution can also report on the type of correspondence received without extra classification effort.

Report	Description
Correspondence In - Not responded to	A report that shows all documents classified as inbound correspondence where no response has yet been sent.
Correspondence In – Currently not responded to – over 31 Days	A report that shows all documents classified as inbound correspondence where no response has yet been sent and the receipt was 31 days or more in the past.
Correspondence Response Times	A report which allows a recipient to be selected and then shows the volume of correspondence inbound to the recipient, whether or not it has been responded to and the number of days required for a response.
Hospitality Report	A report that lists all inbound correspondence to a particular recipient with the word 'Invite' in the document or document title.
Archiving Correspondence	A report that shows correspondence that is responded to and has not been the subject of further correspondence for more than one calendar month. This allows monitored archiving to take place and can initiate archiving and destruction processes in accordance with the council's records management policies.



3. Contact Information

For more information, to arrange a demonstration or to discuss any information in this document, please contact us.

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