

**MINUTES**  
**NSW ECM User Group Meeting**

05 June 2018

Willoughby City Council – Banksia Room

**Present Attendees and Councils**

<b>First Name</b>	<b>Surname</b>	<b>Organisation</b>
Gavin	Cooper	Campbelltown City Council
Amy	Cotton	City of Canada Bay Council
Enna	Russo	City of Canada Bay Council
Ben	Hunter	Coffs Harbour City Council
Peter	Weekley	Cumberland City Council
Caroline	Hillen	Cumberland City Council
Talia	Hunt	Eurobodalla Shire Council
Adam	Callahan	Eurobodalla Shire Council
Asselyn	Bartolome	Hawkesbury City Council
Charlies	Smith	Hawkesbury City Council
Renee	Dunn	Hawkesbury City Council
Deanne	Forbutt	MidCoast Council
Neezam	Eid	Mosman Council
Satini	Hala	Mosman Council
Tony	Wilson	Mosman Council
David	Vien	Mosman Council
Marilyn	McGrath	Queanbeyan-Palerang Regional Council
Julie	Clarke	Queanbeyan-Palerang Regional Council
Pauline	Ly	The Hills Shire Council
Ben	Wong	The Hills Shire Council
Tracy	Madadghar	The Hills Shire Council
Steve	Pogorelec	Willoughby City Council
Hannah	Scott	Willoughby City Council
Fritz	Cardozo	Willoughby City Council
Jonathan	Rottanburg	Willoughby City Council
Carwyn	Sheppard	Wingecarribee Shire Council
Andy	Carnahan	Wingecarribee Shire Council
Kurtis	Redman	Redman Solutions
Matt	Pearce	Redman Solutions
Christine	Erskine	Technology One
Tara	Seymore	Technology One

**Apologies**

Pauline	Webb	City of Canada Bay Council
Tanya	Whitmarsh	Inner West Council
Mani	Joshi	Inner West Council
Mary	Haroulis	Inner West Council
Steven	Thompson	Inner West Council
Diane	Shaw	Willoughby City Council

**Dial in Remotely (Skype)**

Scott	McGuire	Clarence Valley Council
Steve	Quinn	Kentish Regional Council
Nikki	Blyton	Scenic Rim Council
Susan	Mayer	Mackay Regional Council
Reece	Hamblin	Wagga Wagga City Council
Jacqui	Thomasson	Burdekin Shire Council

**Interstate Presenters (Skype)**

Peter	Kiley	City of Port Adelaide Enfield (SA)
Laura	Smyth	City of Unley (SA)
Jeff	Ainsworth	Technology One
Naomi	Henderson	Yarra Ranges Council (VIC)

## 1. Welcome and Housekeeping

Welcome from Debra Just, General Manager, Willoughby City Council, and introduction from Steve Pogorelec Chairperson, NSW ECM User Group, Willoughby City Council.

## 2. Tech One Update – Christine Erskine

- Webex Training
  - Provides constant refresher training
  - Feedback and suggestions are welcomed
  - The next upload will be on the 11<sup>th</sup> July 2018
  - Scope for New Community, will be a way to inform others about bugs. Christine will send emails containing the links for the New Community
- Suggestion to open the NSW ECM User Group meetings to the rest of Australia and New Zealand through Skype
- The next ECM National Conference will be held in Sydney at the end of May 2019. The estimated cost of attending will be \$805 with accommodation, and \$1200-1300 with flights
- Reminder that invoices for this meeting have been issued, and account departments need to arrange payment of invoices.

## 3. Tech One Update – Jeff Ainsworth (via Webex)

- New Release 4.03 2018B
  - Working through bugs and feedback
  - Security configuration is now in the browser, Ci Anywhere
  - Précis builder has been developed, ability to build précis from metadata, and now have the ability to update and choose when to update the précis
  - Bulk update now includes metadata
  - Now have the ability to name the template before it is created
  - Can now define what metadata fields should be searched to automate information
  - Automatic email link for any index
  - Visual display of notes against other versions
  - ULR for rendered documents
  - Quick access now allows users to see the document properties, without looking at the document properties box
  - New map uses spatial co-ordinates, and can be turned on or off
  - Can search for documents using the map
  - Bulk update allows users to modify metadata and share links
  - Will not be released for two months
- New Release 4.03 2019A
  - Will bring back true favourite indexes
  - Retention and Disposal
    1. Triggers – Define the last action for a document and index, and can also be based on dates. Triggers can be built based on any index.
    2. Destroy digital and physical documents – provides a list of the physical documents to be destroyed, and there is also a workflow for this
  - Meetings – waiting for this module to be improved before it is released

- New ways to work through the indexes, able to see the structures and browse through the indexes
- Respond via Template will be returned
- BPA – Business Process Automation, will give 80-90% of the functionality of the ECM workflow

#### **4. Case Study – Promapp Solutions at Willoughby City Council – Steve Pogorelec**

- Promapp was introduced at Willoughby City Council in February 2017, by the Business Improvement Unit
- 16 business unit champions were identified, followed by process editors later in the year
- Was adopted to streamline processes, assist new starters, and reduce the risk of loss of corporate knowledge
- Simplified processes, and allows common tasks to be grouped into activities
- Willoughby City Council now has a total of 337 Promapp processes
- Promapp has been well received
- Commenced the review of existing processes, and interlinking of processes
- Can now suggest a process

#### **5. ECM 4.03 Email Integration and Reporting Update – Peter Kiley (via Webex)**

- Capturing email as a corporate record
- Email creates an essentially unstructured record, although there is some structure e.g. sender and recipient
- It is difficult to automate rules to handle emails, which creates unnecessary administration
- Candidates for automation include:
  - Dial Before You Dig
  - RAA Security
  - Zipporah Booking
  - Mercury eRecruitment
  - Rates correspondence
- These candidates were chosen as they came from the same email address, have the same customer, and have the same terms in the subject of the email
- An understanding of the software was important for implementation
- Increased assisted process registration, which means a decrease in the Information Management team's workload
- Increased amount of registration by 13%
- Saved 109 thousand man hours of work

#### **6. ECM Integration and Unley University – Laura Smyth (via Webex)**

- Email Integration
  - Implemented ECM in November 2017
  - Dropping and dragging emails from Outlook into ECM using quick add profiles, was well received by users, and most users use it for all registration
  - Tested with Office 2010
  - Ironing out issues with Office 2016

- Can drop and drag multiple emails at once
- Emails are still locked in ECM and cannot be edited
- Using the drag and drop method does not add the document number to the subject name in Outlook. Users have been using coloured flags to identified registered documents.
- Registration screen comes up immediately, and users can add the quick add profiles, and this pushes users to register the email immediately, rather than deferring it
- Does not recognise if an email has already been registered, guidelines have been put in place in order for users to know who is responsible for registering the email
- Unley University
  - Provides a link to internal help
  - Link is through ECM Ci Anywhere Site Settings
  - The link can point to the intranet or Knowledge Base, or self-help videos
  - The training calendar is also available in the Unley University, and is useful for new starters
  - No feedback has been received as yet

#### **7. Partner Presentation - Redman Solutions – Has your Council Captured Credit Card Numbers in ECM - Matthew Pearce**

- Using Sli.do the following questions were asked, and the votes were tallied
- Question: Has your Council captured credit card numbers in ECM?
  - 47% Maybe
- Solution provided by Redman is PCI DSS Compliant
- Example: Mosman Council
  - Issue of having a lot of credit card details in ECM, and were not compliant
  - To try to solve this issue, they stopped Dataworks faxing, and were manually redacting incoming credit card details
  - Wanted to redact all existing documents in ECM containing credit card details, however, this would create redacted copies and the original remained in ECM
  - Using algorithms, Redman was able to redact all versions of the document
- Question: Does your Council have an awareness of the issue of credit card numbers?
  - 45% Yes – We are doing something about it
- Question: What are your next steps with credit card data removal?
  - 57% We need to ask more questions
- Redacted version replaces the original and does not affect processing

#### **8. Case Study – Update to Council’s Knowledge Base Categories Referencing the GDA39 Schedule at Willoughby City Council by Steve Pogorelec**

- The Knowledge Base is on the intranet and allows information sharing
- 214 articles to date
- Utilises the GDA39 Council Functions and Keywords
- In the last month there were 881 views by staff

- Issues were that it was hard to locate articles, there were too many search results and restricted search capability
- Used the terms Function and Keyword to group the articles together
- Taxonomy now complies with GDA39 schedule
- Removed duplications and similar articles
- Easily links to all related articles, and relationship are clearly defined

## 9. User Engagement – Ci Anywhere (ECM) Training and Support & ePlanning at Yarra Ranges Council – Naomi Henderson (via Webex)

- Ci Anywhere (ECM) Training and Support
  - All staff have been provided with a laptop and Windows 10, the only way to access ECM is through Ci Anywhere
  - Training Sessions
    - General Demonstrations
    - Focus on a Function
      - ECM task list
      - Adding/editing/sending
    - New Users
    - Team
      - Prioritising those on Windows 10 and use ECM
      - Before each session, teams are sent a questionnaire to find out how they use ECM
    - Drop in Sessions
  - Sessions are held weekly
  - Folders are set up on the users' computers in order for them to drag the documents that need to be registered to this folder
  - After sessions, an email is sent which outlines key points
- ePlanning
  - Tech 1 software
  - One place for customers to access all application information
  - Aims to ensure the customer provides all the information at the first point of call
  - Customers need a log in, and then they can access their applications, previous applications, and search for applications
  - There is a Make a Submission form on the webpage, and these forms are automatically registered into ECM
  - Emails generated through ePlanning are automatically added to ECM using #Hashtags and T1 Connect
  - Once documents are accepted they are automatically added to ECM and Pathway
  - Next stage is to review how many hardcopy applications are being received and aim to stop receiving hardcopy applications

## 10. General Business

- Next meeting: **Thursday 8<sup>th</sup> November 2018 to be held at the Tech One Office in North Sydney**