HAVANT BOROUGH COUNCIL

Scrutiny Board

Mail Services and Document Management System

Report by: Governance and Logistics Scrutiny and Policy Development Panel

Portfolio: Governance and Logistics

Key Decision: No

1.0   Purpose of Report

1.1   To present the recommendations being made in connection with the Panel's review of the mail services.

2.0   Recommendation

2.1   The Governance and Logistics Scrutiny and Policy Development Panel recommend that the report be noted.

3.0   Summary

3.1   The Panel reviewed the role of mail services and what work was being undertaken to ensure that the Council moved towards paperless working.

4.0   Mail Services

4.1   The mail office provides, amongst other services a postal service to Havant Borough Council (HBC), Hampshire County Council and all other partner organisations. The post is sorted in different ways, with all post for HBC officers opened in the mail office. Some of the post is scanned by the mail team and sent electronically to staff. Depending on if there are cheques involved the majority of the rest is delivered to resource areas around the Plaza. For many partner organisations the post is delivered unopened to their relevant resource areas. Any outgoing mail for partner organisations is sent through the mail office and recharged back to the organisation.

4.2   Meridio is the current document management system used by the mail room. As technical support for Meridio will be stopped in June 2015 work has been undertaken to investigate a replacement. A new system called IDOX has been identified as a suitable and effective replacement and it is recommended that it be installed for use by the Planning department by late 2015. Investigations are on-going as to whether it will be rolled out to other areas of the Council. If it is adopted it will not be fully functional initially as a testing phase will commence to ensure that any issues are resolved before it is rolled out to specific service areas in the council. IDOX will have the benefit of being fully functional with the

council's other case management systems making the process more streamlined and efficient.

4.3   Investigations will take place into how IDOX will feed into the personalisation project. The new system will be focused on providing a more customer friendly service experience by taking the information from all of the back office systems and making it available to the customer service officers. Further improvements to the customer experience delivered by IDOX will also include enabling customers to select to a larger degree the level and amount of information that they wish to have about planning applications.

4.4   One of the other major benefits of IDOX is that if there is no internet or network access available across Hampshire County Council the system can still be used as the information will be hosted on a server outside of HCC. This way HBC reduces its risk of any technical errors restricting its access to important information.

4.5   IDOX is not an automated system and would require monitoring with the mail room staff being trained in the new system (training costs included in the set up price).

4.6   The planning service still has an archive of microfiche and as part of the installation of IDOX this would be transferred into a different format that would be compatible with the new system.

4.7   The costs of installing IDOX are as follows:

Licence - £25,000
Hosting Fee - £19,000
Annual Fee (maintenance, training etc.) - £14,860

These costs are comparable to the same service provided at Hampshire County Council in addition to the system being utilised by over eighty other local authorities.

4.8   As the implementation of the new system is a work in progress an update should be provided to the Governance and Logistics Panel in six months time detailing the projects development. An update may then be provided to the Board in future if deemed necessary.

5.0   Implications

Resources:

5.1   The introduction of the new document management system could potentially lead to a more labour intensive system at the source as well as require a new location for the scanner. Some of the additional costs may be met by savings in administration involved in the filing of paper documents.

The installation costs of the IDOX system quoted in this report have been approved as part of the Council capital budget for 2015/16 and any on going costs have been and will be included within the Council's revenue budgets.

Legal:

5.2

As there is a risk of data breaches, officers will need to ensure that they continue to comply with the Council's policies on Information Management in order to deal with confidential and non-confidential communications.

Strategy:

5.3 The introduction of a new document management system will support the Council's strategic aim, stated in the Corporate Strategy, of achieving financial sustainability by delivering a process at the right quality and the right price for our customers.

By investing in the system the Council will meet its aim to provide services that are accessible, efficient and fit for purpose.

Risks:

5.4 Introducing the new system may result in an initial delay in inputting archived information and a potential loss of some data in the scanning process.

Communications:

5.5 All Council departments will have to be informed of the new postal processes.

For the Community:

5.6 An improved document management system will help support the Council's proposed Customer Relationship Management System and thereby our back-office systems will be made more available to our customer service officers and to the customer directly through their own personal account.

6.0 Consultation

6.1 The Panel interviewed the Corporate Support Manager and the IT partnership Manager as part of their investigations.

Agreed and signed off by:

Relevant Executive Head: 10 July 2015
Finance: 25 June 2015
Legal: 19 June 2015

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