

tab FUSIONRMS

Carlsbad Integrates Paper and Electronic Records Management into One Affordable and Easy-to-Use TAB FusionRMS System



The amount of information county and city government agencies handle today is greater than ever. Managing this volume of information to meet the needs of internal and external constituents requires a solution that works the way government agencies do. That means handling both paper and electronic documents in one system and with a common set of features.

For some government agencies, the vision of a completely “paperless” environment is enticing. But for most county and city agencies, such a prospect is impractical. For starters, the amount of paper many government agencies have to track and manage is actually increasing rather than decreasing. Going “paperless” requires prohibitively expensive resources in hardware, software and personnel, pushing a payback that’s measured over years versus months.

That’s because all-electronic solutions require government agencies to virtually swap out their old records management infrastructures and force government personnel and citizens to change deeply ingrained (and often mandated) preferences for paper documentation.

For these reasons, many government agencies have been searching for a third approach—one that doesn’t require them to compromise their paper records management systems without really solving any of their inherent inefficiencies and limitations, and one that doesn’t force them to plunge head-first into an expensive electronic solution that has little prospect of ever living up to vendor promises.

Carlsbad takes the initiative

The City Clerk’s Office in Carlsbad, Calif., is a good example of finding the right approach. Located 30 miles north of San Diego, Carlsbad has grown from a quiet seaside community, famed for its beautiful beaches and flower fields, to a city of over 90,000. City planners anticipate another 45,000 residents by 2015. The City Clerk is responsible for a variety of growing information management requirements, including serving as records manager for other city departments.

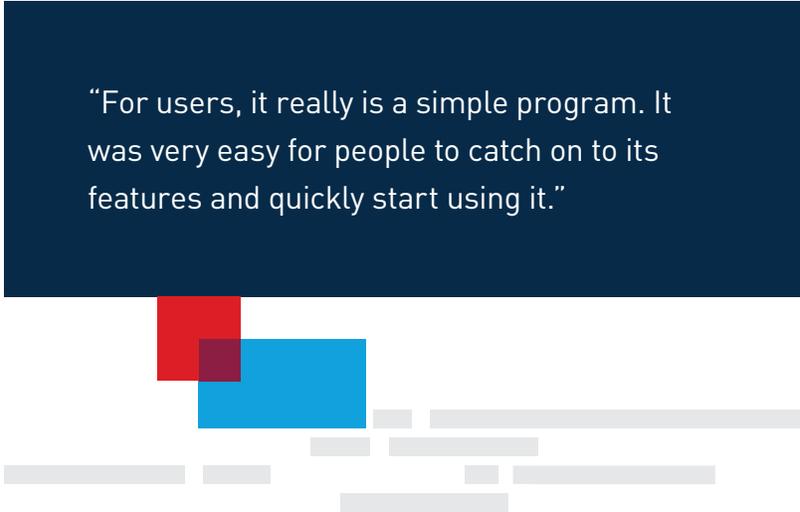
According to Ronna Stickrod, Records Supervisor in the City Clerk’s Office, the department’s existing procedures for meeting this need began buckling under the strain in the late 1990s. Across the city, different departments

were managing documents on their own by printing their own folder labels and using their own records management systems. As a result, public records were often hard to find, and retention and disposal policies often ignored.

The problem was particularly acute in the City Clerk’s Office, which bore a heavy research burden for other city departments. “They had a records vault filled with papers and folders, but because of the way it was organized, finding what you needed was sometimes like finding a needle in a haystack,” Stickrod says.

Carlsbad decided it needed a consistent, easy-to-use file labeling and records management system where all folders and records could be tracked and managed by personnel with appropriate access rights. TAB FusionRMS was the answer to the city’s paper and electronic file management needs.

Carlsbad started out with the TAB FusionRMS application that helps maximize the efficiency of paper filing systems. The software allowed the city to quickly and easily create labels and folders that included file headings, color-coded indexing, bar codes, text, images



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and graphics. This made managing the city’s large filing systems less labor-intensive and dramatically eliminated misfiled documents.

Today, TAB FusionRMS is used by 24 city divisions, including the City Manager’s Office, Public Works, Finance, Fire Department, Human Resources and others. Along the way, Carlsbad adopted TAB’s Records Management Software designed to end missing files and enable records managers to greatly improve service to

internal customers by providing instant access to file locations, usage, status and user requests. Its use of barcode technology allows automated file tracking and quick, accurate data entry.

“It was easy for them to catch on.”

With TAB FusionRMS, Carlsbad has been able to create a centralized electronic repository of information on all electronic and paper records citywide, while allowing the departments themselves to actually manage and store their own physical documents. Records managers can see at a glance what records other departments have and can ensure they are following consistent records storage, retention and disposal policies. TAB FusionRMS also makes fulfilling public information requests easier by allowing managers to quickly locate hard copies of files and records.

One feature that all 60-plus users across the city departments especially like is TAB FusionRMS' ease of use. “For users, it really is a simple program,” says Stickrod. “It was very easy for people to catch on to its features and quickly start using it.” Carlsbad also appreciated TAB's service and support. “TAB Support Representative Dave Clark came out for a week as we were expanding the system,” recalls Application Specialist Nancy Amano. “He was very professional, really knew the product and was extremely helpful in getting it implemented. And ongoing service and support are really good.”

As Carlsbad has discovered, TAB's TAB FusionRMS solutions may be the most practical way for cities with a mix of paper and electronic records to manage everything with one easy-to-use system. It makes TAB FusionRMS one of the most affordable solutions for city and county governments since agencies can buy only the functionality they need and expand it over time. And FusionRMS' intuitive, easy-to-learn features eliminate the need for extensive user training. That came in handy for Carlsbad, which has experienced heavy staff turnover in recent years. None of this would matter, however, without the service and support to help with implementation and ongoing use. Here, too, TAB delivers, according to Carlsbad managers. That's not so surprising, however, from a company with over 60 years of innovation and experience in records management

TAB Customer:

City of Carlsbad, California

Challenge:

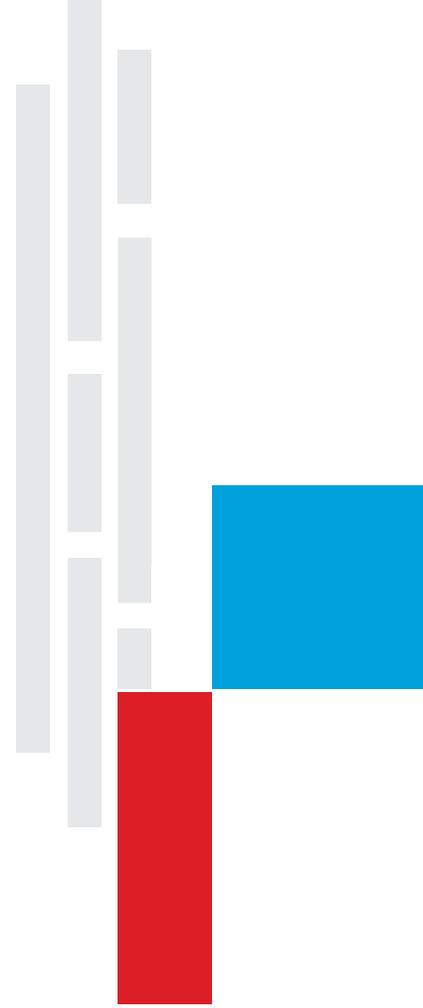
Developing a standardized records management system for city departments and ensuring records management policies are followed.

Solution:

TAB FusionRMS Enterprise for Government

Results:

- A central view of paper and electronic records in 24 city divisions allows records managers to ensure that records management policies are met. No need for an impractical “paperless” solution or lengthy implementation.
- A single integrated system makes both electronic and paper records easy to find and share.
- The TAB FusionRMS system provides greater affordability. New features can be added over time as needs arise.
- The easy-to-use system enables rapid adoption. Simple-to-follow procedures reduced user training needs and enabled efficient rollout to users in 24 city divisions.
- TAB's superior service means high-quality support is always available when needed. TAB's records management expertise and understanding of government needs enhanced the implementation.



Manage Your Paper and Electronic Records Together

Want to see how TAB FusionRMS can easily manage your paper and electronic records together? We can help! Visit our website or call us for more information.

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