

City of Sherwood

Content Manager plays key role in preserving Sherwood’s 125-year-old history with user-friendly ORMS solution



Overview

Sherwood is a residential community in the Tualatin Valley, southwest of Portland, Oregon. Sherwood’s population is close to 20,000, and the city limits have expanded to four and a half square miles. There are thriving businesses and modern amenities—all amongst the small-town charm.

Challenge

Sherwood is over 125 years old, and this history comes with a lot of records. City Recorder Sylvia Murphy knows how important good record-keeping is: “Our City Council records date back to the late 1800s, and consist of legislation, council meeting minutes, court records, and much more. This is precious data giving an insight into history that we absolutely have to preserve permanently. In my role as City Recorder I am very aware of the risks of a natural or manmade disaster to our records.”

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SYLVIA MURPHY, MMC

City Recorder
Sherwood City

She adds: “Already, I have blocks of time with record gaps where a fire has destroyed paper records, or they have been damaged through poor storage. Although Sherwood has introduced an electronic record management system, this has not been adopted city-wide. It was partially implemented and not supported by robust record management processes. To add a record, up to 10 fields had to be completed, which made it time-consuming and cumbersome.”

The system did not support a clear retention policy that would alert record owners when a record had met its retention date. As a result, the system became a ‘dump-all’ with no clear structure. The team looked for a user-friendly solution that would support a 100 percent paperless system, with the opportunity to open certain record types up to public access.

Solution

Through her network of City Recorders around the state, Murphy learned about the Oregon Records Management Solution (ORMS), run by the State’s Archives, in close partnership with Chaves Consulting. ORMS, with OpenText™ Content Manager at its center, is a cloud-based Solution as a Service (SaaS), enabling state agencies, cities, schools, and special districts to securely manage records from creation through to disposition.

With more than 75 client agencies working within ORMS datasets, and over 14 million records kept securely in a central data center



At a Glance

- **Industry**
Government
- **Location**
Oregon, United States
- **Challenge**
Introduce a 100% paperless, city-wide, electronic record management system to preserve the city’s 125-year-old history with clear retention date policies
- **Products and Services**
Content Manager
- **Results**
 - + Enthusiastic adoption throughout the city’s departments
 - + Department of Defense certification moves Sherwood closer to 100% paperless archives
 - + Record management policies and procedures definition
 - + Enhanced security as clear retention policies ensure records are kept no longer than required

"We tapped into great support and knowledge during this project. We work with Chaves and Micro Focus (now part of OpenText™) in true partnership and could implement our Content Manager-driven solution at our own pace."

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location managed by Chaves, Murphy was soon convinced: "The State endorsement and the fact that ORMS provides great out-of-the-box functionality, coupled with the Chaves expertise to customize the system for our particular requirements, sealed the deal for us."

ORMS complies with strict Department of Defense (DoD) 5015.2 certification, to manage document lifecycles from initial capture to long-term archival. This means Sherwood will be able to go 100 percent paperless with its records management system, to preserve the security, integrity, and access of its vital records.

Sherwood took the opportunity to document record management policies as part of this project. In a phased deployment, several departments with a high volume of records worked with Murphy to adopt ORMS. Many records were already in electronic format, but not held in a central repository and, as a result,

not easily searchable. The collaborative approach really paid dividends, as Murphy explains: "We recognized that although our City Departments have very different missions, our records share a lot of similarities. Once we started to talk about record types, rather than individual records, we could share best practices and learn from one another."

The City Recorder's office was the first department to take the plunge, followed shortly by HR, Municipal Court, Building, Planning, the City Manager's office, Finance, Payroll, and the City Library. Murphy comments on the fast adoption rate: "Because we involved our staff from the very start, it smoothed the transition to ORMS. With a user-friendly drag-and-drop approach, the system could not be easier, and our early adopters fully embraced ORMS and became advocates for it throughout our city." The Municipal Court had a great use case for ORMS. The city had introduced a photo speed

enforcement program which created high volumes of traffic citations with a five-year retention period. Within six months, a closet was filled with boxes and the department needed help. Citations contain personal information such as driving license numbers, so security was also of the utmost importance. Once licensed with ORMS, the citations were soon digitized and safely stored in ORMS. The physical copies will shortly be destroyed.

Results

Sherwood plans to introduce Content Manager's WebDrawer feature. This is used for any records that can be published externally, such as minutes or recordings of public meetings. ORMS will also become part of the on boarding process for new staff, so that structured record management becomes second nature to everyone in the city's departments.

Murphy is pleased with the ORMS implementation: "There are so many aspects of the system that make total sense. ORMS gave us a skeleton records management system that we could easily build upon to meet our own requirements. The collaboration with Chaves guided us towards best practices and helped us introduce customized written policies."

She concludes: "We tapped into great support and knowledge during this project. We work with Chaves and Micro Focus (now part of OpenText™) in true partnership and could implement our Content Manager-driven solution at our own pace."

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