

# CITY OF FREMANTLE TRANSFORMS DOCUMENT MANAGEMENT AND INFORMATION GOVERNANCE WITH M-FILES AND CADMUS CONSULTING

## THE CHALLENGE

The City of Fremantle is a local government authority located 20 kilometres south of the Perth CBD. It comprises the suburbs of Beaconsfield, Fremantle, Hilton, North Fremantle, O'Connor, Samson, South Fremantle, and White Gym Valley. Fremantle gained city status in 1829. Today, it employs more than 450 people and services approximately 30,000 residents over a land area of 19 square kilometres. As a local government authority, the City is inundated with paperwork on a daily basis. Much of this paper relates to planning and building applications, and all of it needs to be managed appropriately. This includes physical storage for a minimum of seven years. When paperwork was provided to the City, employees would previously scan all the documents and send them to the relevant team for action to be taken. Often, those documents would be printed out again by team members and would touch many hands. Determining which documents were the most recent and correct could be challenging. This created issues around document management, compliance, and governance.

Joel Hurst, IT Manager, City of Fremantle, said, "The previous document management system was cumbersome, hard to use, and slow to search. Consequently, staff members just didn't use it. Instead, information was stored in a variety of silos including network drives, personal computers, thumb drives, and cloud storage platforms. It was important to consolidate that information and store it appropriately where it could be easily accessed now and into the future. "Furthermore, the City needed a better way to manage its institutional knowledge. This IP was disappearing when staff members left because it wasn't managed appropriately. It was important to address this risk."

## PRIORITISING END-USER REQUIREMENTS

The City began searching for a solution that was developer-friendly, easy to use, and would prioritise end-user requirements. The City began a tender process that attracted 18 responses, which were narrowed down to a shortlist of six. Following demonstrations and in-depth investigations, the City of Fremantle chose Cadmus Consulting to deliver M-Files. Joel Hurst said, "Given that users never embraced the incumbent solution, it was essential to find a solution that they would want to use. It wasn't just about whether the solution ticked all the boxes for the IT team, it was about whether end users would want to use it. That's what we found with M-Files." The City undertook significant integration work and migrated the entirety of its document archives to M-Files in a process that took just less than 12 months. On go-live day, all 450 users immediately switched from the old system to M-Files. Joel Hurst said, "If the integration and document migration hadn't been required, the City could have implemented M-Files in around four weeks. It was pulling every last document out of the old system and putting it into the new system that took the time."

## A CULTURE CHANGE AROUND DOCUMENT MANAGEMENT AND COMPLIANCE

Since implementing M-Files, the City has solved its document management and governance challenges. End users can find what they need, when they need it. Joel Hurst said, "Users are finding more information than they thought was there, which is a huge benefit. It's easy for them to register a document with M-Files and they're doing it on the fly, which means documents are being managed according to best practices. Even new staff members are using M-Files from day one. "Implementing M-Files has changed the culture of document management for the City. Before, document management was seen as tedious and mundane; it was just about compliance. Now, that's been flipped because it's so easy to find everything in M-Files, so everyone has fully embraced the solution." Even staff members who struggled to use the previous system effectively are now using M-Files without any issues, including non-tech savvy staff members.

## SECURE MOBILE INTERFACE IS IDEAL FOR THOSE WORKING FROM HOME

COVID-19 lockdowns meant that the City staff members were working from home. The City provided access to M-Files for staff members, letting anyone with an internet connection access the system. Joel Hurst said, "Since the workforce was sent home, the user numbers in M-Files have gone up as people have been using it more while they've been at home. There have been no issues with people using M-Files remotely and, in fact, it's taken some pressure off the VPN. M-Files sits securely behind firewalls and secure internet gateways, so the City is confident that it's secure."

## SINCE GOING LIVE

Now that the City has begun to extract significant benefits from M-Files, it's working with Cadmus to see what benefits it can look for next.

Joel Hurst said, "The City of Fremantle, along with Cadmus Consulting, is pioneering a solution that will integrate M-Files with Esri geospatial mapping software to make it even easier and more streamlined for developers and builders to submit their plans. This is very exciting and will make it faster and easier for developers and builders to get their projects off the ground."

The City is in the process of developing a web-based customer request management system and a customer portal that will let its customers better interact with it. Customers will be able to submit service requests online including planning and development applications, pay their rates or pet registrations, as well as have access to all previous documentation pertaining to the customer or their residence. These requests and supporting documentation will all enter The City's customer relationship management (CRM) system and will use M-Files to workflow these through to the most relevant staff to complete the request.

Joel Hurst said, "Most of the things that the city does as a local government relate to a property. Therefore, having a geospatial system underpin the customer-facing portal made a lot of sense. The city elected to replace its existing geographic information system (GIS) with Esri. The city chose this product not only because of its features and functionality, but also because it is developer friendly. This lets the city develop its web portal around it and makes it easier and simpler to capture the information required."

The M-Files Esri plug in lets the City seamlessly integrate between these two systems. Staff can select a property in Esri and use the M-Files plugin to see all of the documentation related to that property or its owner.

Joel Hurst said, "The City is also building functionality for customers or staff to drag and drop documents onto a property in Esri, which will automatically register the information in M-Files with the correct classifications. This will make it a lot easier for staff to register documents correctly and find them quickly and easily. Field staff will also be able to use the M-Files Esri plugin on the road. GPS will give them easy access to their location on a map where they will have all the information pertaining to that location automatically available in M-Files for easy reference."

The use cases around these two products continue to grow and the City of Fremantle will be developing a lot more in this space over time

## WORKING WITH CADMUS CONSULTING AND M-FILES

M-Files partner, Cadmus Consulting, worked with the City to deliver a document management solution that exceeds the city's expectations. Joel Hurst said, "The Cadmus Consulting team has been excellent and has really opened my eyes to the possibilities regarding document management systems. The team helped us get the integration right, which has taken time but, looking back on this project, we've achieved great things. It has delivered a lot more than we thought it could and has put the City in a position where we can achieve even more.

"This solution 100 per cent matches the needs of the City and has been a total success. The future is also exciting with even more functionality on the horizon. While it was a risk to choose a solution that hadn't been implemented in an Australian local council before, the result has been exceptional."