

Success Story

Transport Research Laboratory— Transforming into an open information environment

An office premises move meant that TRL, a transport research center, had to completely revisit the way it managed and stored its documents and information. Virtually all business processes were heavily dependent on paper, the storage of documents was localized and consequently lacked structure, and there was physically insufficient space in the new building to continue with paper-based processes.

“Our overall aspiration was to create and apply new knowledge which, thanks to Open Text’s Livelink ECM, we have achieved within very impressive timescales, and which has completely changed the way we work. In that sense, the project has been an outstanding success as staff are already working in an information sharing environment, raising TRL’s future options and enabling capabilities far beyond expectations...”

Kevin Miles,
Head of Knowledge Management, TRL

The center employs 550 staff, including 400 scientists many of whom are world leaders in their field, and its work provides original and innovative solutions to a range of clients from both the public and private sectors. With a presence in more than 100 countries, TRL enables better transport for communities and societies worldwide. For example, TRL’s SCOOT software controls most of Central London’s traffic signals and is used in more than 200 cities and towns worldwide.

Situation

To enable its two key business drivers, TRL initiated its ‘Moving Ahead Project’ in 2002. The first initiative was to enable the center to move to new premises while retaining its intellectual capital generated over the years. The second driver was to enhance access to that information to better utilize TRL’s knowledge and experience.

Knowledge Management had become a central pillar of TRL’s vision and its new framework had to be designed to keep the company’s business strategy moving forward.

The broad objectives for TRL’s Knowledge Management were to implement and maintain an information strategy that incorporated a long-term IT plan and to employ an information architecture with tools and processes that allowed knowledge, information and data to be managed efficiently and fully utilized. There was also a requirement to combine the operational management of IT, Information Management, Records Management and Project Quality Assurance in order to ensure TRL had the required information base it needed to support future knowledge requirements.

Using Open Text’s Livelink ECM™ suite of products, TRL transformed its information environment by converting essential paper records collected over 40 years to electronic files in just four months.

Organization

TRL (Transport Research Laboratory) is a globally recognized centre of excellence providing worldclass research, advice and solutions for all issues relating to land transport. The UK’s leading center for transport research, TRL has been designed to provide leading edge expertise in understanding and mitigating the environmental impacts of transport as well as undertaking work in key areas such as road, network and vehicle safety, traffic management, planning and control, and a range of infrastructure capabilities.

Industry

Research & Development

Customer



Business Challenges

- Diminish heavy reliance on paper-based processes
- Reduce physical storage space required
- Retain capitalized knowledge
- Enhance information access

Business Solution

- Livelink ECM™

Business Benefits

- Implementation of EDMRS enables electronic document scanning, filing and retrieval
- Conversion of paper-files to electronic format
- Improved and more effective document access
- Improved cross-divisional co-operation produces better work results
- Improved productivity
- Greater consistency in customerfacing and corporate activities
- Increased accuracy in business decision making
- Improved document and records tracking with full audit trails

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The task facing TRL was a daunting one. Originally a government agency, the center had been privatized in 1996 to become commercially independent. TRL had spent 40 years in offices designed for 1,200 staff but was now occupied by only 550. Paper records and artifacts were stored in just about any available space—offices, stairwells, corridors, laboratories and some places best not too mention! A survey revealed shelf space of 10 kilometers of physical records, but only four percent of these records were managed in registered files. More than 90 percent of data, project files and documents were locally stored and backed-up by users individually. All this data had to be sorted before the move into the new building, ensuring that business critical documents were retained while unwanted files were weeded out—all without interrupting normal business activities or the move schedule.

Solution

The TRL Board made the decision to implement an Electronic Document Records Management System (EDRMS) using Livelink ECM from Open Text™.

In the summer months of 2003, all staff participated in 'Records Management Weeks' when more than 125 tons of paper and 15 tons of confidential material were shredded and recycled. Over 500 filing cabinets were emptied and recycled, 109 garbage bins removed and 8,300 books sent to the Circa Trust.

The clean-up stage was followed by a phase of restructuring and scanning the remaining 300,000 documents into a file plan that was subsequently seamlessly migrated to Livelink ECM. The complete migration took place over three consecutive weekends in January 2004. Throughout the migration, existing access permissions were fully maintained.

The 'Moving Ahead Project' was not just about filing and clearing of records—it was about fundamentally changing the information culture at TRL. The completed project told a story of information management in its most comprehensive form—from preparing the organization and documents for EDRMS to managing the cultural transformation as staff moved from cellular offices with 'cellular' information to an open plan and information environment.

Prior to the move, TRL believed it possessed approximately 3,000 formal scientific reports and a similar number of confidential client reports, but most staff only had access to documents they had created themselves or to those written by immediate predecessors. However, the records clearance program identified more than 8,000 scientific and over 7,500 client reports. As part of the 'Moving Ahead Project' these

reports have been scanned to PDF files, indexed and made text-searchable within Livelink ECM, ensuring that researchers can find the most relevant information.

Benefits

Kevin Miles, Head of Knowledge Management at TRL, oversaw the entire operation and is delighted with the outcome. Miles said, "Our staff now have access to all TRL research and project documents rather than relying on personal files in local filing cabinets, which has greatly reduced the time needed to conduct literature searches. This has resulted in greater cross divisional co-operation as staff realize local TRL experts can help them in their work, reducing time and achieving better final results. We could not have met our targets without relying on document filing and retrieval from Livelink."

At a corporate level, workflows, procedures and template documents are now replacing locally developed activities, providing greater consistency in both customer-facing and corporate activities. There has also been a marked increase in accuracy in business decision making.

Miles explained, "Growing use of and dependency on structured procedures utilizing templates and workflows is resulting in a more uniform approach to managing our business. Project decisions now reflect greater and more effective access to supporting documentation, while decision record keeping has significantly improved, supported by full audit trails. In the time of the old TRL, only 4 percent of documents were in registered files, as opposed to today, when all project documents are kept in their Livelink project folders."

One of the more obvious benefits of the project are the cost savings that have been achieved using Livelink ECM by reducing the floor space required by TRL. Miles said it would have been "impossible" to estimate how much larger the new building would have to have been to store all the retained documents while ensuring spare capacity for future growth. TRL estimates that it will see a return on investment on the Livelink implementation within just 12 months.

Miles concluded, "Our overall aspiration was to create and apply new knowledge, which, thanks to Open Text's Livelink ECM, we have achieved within very impressive timescales, and which has completely changed the way we work. In that sense, the project has been an outstanding success as staff are already working in an information sharing environment, raising TRL's future options and enabling capabilities far beyond expectations. The bottom line was to create new information systems that provide the foundation for future business success. And the result was a job very well done."

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