Port Macquarie-Hastings Council

Making Short Work of Data Migration at PMHC

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Migrating more than half a million objects into an EDRMS is never a task to be taken lightly. Port Macquarie-Hastings Council (PMHC), a local government organisation located in northern NSW, recently faced this challenge after implementing HP TRIM for over 400 users.

The council also uses Civica's Authority enterprise solution as its Land Information System and Asset Management solution.

When PMHC implemented HP TRIM as its EDRMS solution, all new correspondence and content was required to be captured directly into the EDRMS electronically.

There is two-way integration between Authority and TRIM via existing plug-ins to both applications. This allows users of both to see related documents and data without exiting the respective software interfaces. However, the council was faced with an archive of 500,000 items sitting on a network fileshare.

When the Authority solution was initially implemented, all document content associated with, or generated by Authority was stored to a file server hierarchy. The council decided this needed to be relocated to HP TRIM and linked to records in Authority.

Before undertaking any large and complex migration project, it is essential to understand what exactly are the business drivers.

For PMHC the ability to have all Property, Rating, and Asset related documents centrally located and managed was critical.

In order to achieve this, the council engaged consultants Information Proficiency to undertake migration of the file server content. After an earlier unsuccessful attempt, the council realised it needed to engage someone with experience in data conversions and migrations within HP TRIM and able to apply specialist tools and techniques.

The Information Proficiency solution included rules-based routing of content and creation of new folder structures in TRIM based on metadata in Authority. This emulates the result that is produced when new content is exported from Authority in its current configuration.

Information Proficiency project manager Simon Blunt said the first challenge was to identify all the documents on the fileserver that related to records in Authority.

"We migrated everything that Authority knew about, which left council with a vastly reduced subset of unmanaged data that they were able to address quickly," said Blunt.

Information Proficiency was able to link file server content to Authority registration data before the migration. This ensures that all property and rating, and asset-related electronic documents are stored and managed in a single, central repository, which is accessible from both Authority and HP TRIM. Users have improved search results and more complete information presented when accessing property, rating, and asset records.

The integration of Authority and the council's ESRI GIS application now means GIS users can also access related document content.

File migration projects are often bedevilled by a multitude of unstructured file types including video files, images and PST files, which in this case did not present such a big issue as PMHC's main formats on the file server were Microsoft word documents, pdfs and spreadsheets.

However, changes to the way that filing practices had been applied by users over time did provide some challenges.

"The file server and Authority index were only loosely related and files dated back more than a decade, where over time rules for filing documents in Authority had evolved. The historical filing rules had evaporated, so we had to find the rules and then map them." said Blunt

Other issues that needed to be dealt with included changes to filing structure, naming conventions, and recognising links to preserve for relationships with other records.

"We estimated the project would take 20-30 days effort to complete and were pleased to be able to deliver in 27 days" said Blunt

PMHC is now taking advantage of Information Proficiency's expertise to streamline processes and enhance the performance of the EDRMS, as well as capturing and importing legacy hard-copy records and metadata.

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