Hewlett Packard Enterprise

Data integrity cuts operating costs at RBF

HPE Content Manager[1] streamlines migration and management of legacy business information

Objective
By retiring five expensive legacy systems, RBF sought to streamline record keeping to improve information integrity, corporate accountability, and legislative compliance.

Approach
After consultation with Kapish, a HPE Software Gold Business Partner, RBF chose HPE Content Manager to deliver a single version of the truth for its historical member records.

IT Matters
- Successfully migrated 170,000 individual member files, approximately 500 GB of data, and 600,000 PDFs

- Imported PDFs, TIFFs, CSVs, and text files into the desired structure within one year—12 months ahead of schedule

- Reduced risks during the data consolidation phase by adopting an intelligent and consistent approach

Business Matters
- Preserved information integrity and enabled corporate accountability

- Reduced annual operating costs by A$400,000 by retiring legacy applications

- Achieved a single version of the truth for historical member records with minimal training

Retirement Benefits Fund Tasmania creates a single version of the truth

Retirement Benefits Fund (RBF) uses HPE Content Manager to improve information integrity and corporate accountability. By consolidating and centralizing historical member data, RBF is ensuring the authenticity and accuracy of information, while facilitating secure audited employee access. In the process, RBF has migrated data, retired five legacy applications, met its regulatory compliance obligations, and significantly reduced its operating costs.

Challenge

Restructure provides impetus for retiring costly legacy applications
Since 1904, the RBF Board has managed superannuation for Tasmanian public sector employees. Today, RBF provides wealth creation services to more than 75,000 members and manages A$5 billion in investments.

When RBF decided to outsource its superannuation administration processes to an external service provider in 2010, five in-house applications became redundant. While they were no longer required for operational

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"By implementing HPE Content Manager as our member records and document management system, we have gained a single version of the truth for our historical records. In the process, we have successfully migrated data, ended the life of five legacy applications, and consolidated our records. This has reduced our operational costs significantly and dramatically improved productivity and customer service."

— Damien Hill, Corporate Systems Consultant, Retirement Benefits Fund

purposes, the applications contained valuable member information, which would need to be captured and accessed in the future.

"As these core applications were going to be decommissioned, we needed to find a way to manage the information they contained," explains Damien Hill, Corporate Systems Consultant. "In addition, we had obligations in relation to member information and sought to comply with legal, record keeping, and fiduciary requirements."

One of the factors driving this project was the rising cost of maintaining RBF's legacy systems. To keep just one of its systems running—the in-house superannuation administration system known as RBFSAS— the company needed to spend A$400,000.

"The challenge with RBFSAS, as with the other in-house systems, was that we needed to spend a considerable amount of money to keep it up to date," adds Hill. "There was no point in continuing to invest in multiple legacy applications that created ineffective siloes and that would remain largely unused."

"The impetus to outsource was for RBF to become an efficient and agile organization. Having set on this path, we were keen to realize efficiencies in the backbone of our

business—the member data. We wanted to be able to access member records without having to open five applications and flick backwards and forwards through hundreds of pages."

Solution

Migrating data and retiring legacy applications streamlines records management

RBF was already using HPE Content Manager (formerly known as HP TRIM) for its document management system.

"It made sense to explore the possibility of using it to manage our member records," says Hill. "After consultation with HPE Software Gold Business Partner Kapish—the organization that helped us with our original implementation of HPE Content Manager— we decided to go ahead with migrating the data and retiring five legacy applications.

"We had a highly customized software environment with a huge amount of data," explains Hill. "This included 170,000 individual member files to capture approximately 500 GB of data, 600,000 PDFs, and some 9 million unique rows of data contained in 27 different tables. While we could export this information fairly easily, it was the import

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and management function we were really concerned about, given the inconsistencies in the file formats."

To overcome these challenges, RBF drew on Kapish's extensive experience with HPE Content Manager. The team developed scripts to extract and import the data—PDFs, TIFFs, CSVs, and text files—into the desired structure. "This was the key to success for this project," says Hill. "It cut considerable time off the planned migration timeframe, which we originally thought would be two years."

Kapish Director Jon-Paul Williams says, "It's clear to see from the success of this project that HPE Content Manager is a real solution for legacy data management, including application end-of-life solutions. The project showcased how a simple design can be highly intuitive for users, and provide the business with ongoing value and direct access to required information, while meeting regulatory and compliance obligations."

Benefits

Achieving a single version of the truth and improving productivity

Once the implementation was completed, Kapish demonstrated the new system to RBF and showcased the ease with which users could access, search, query and archive records.

"User training was quick and easy," says Hill. "It was completed in less than two hours. As our people were already familiar with HPE Content Manager, it took an average of 15 minutes to show users how to search member records and access historical data using the member numbers."

"Feedback was unanimously positive. Users were blown away by the simplicity, speed, and efficiency of the system. Specifically, they were extremely happy that member information could be accessed through one interface without having to switch between multiple systems or remember different passwords. The productivity improvements were immediate—both internally and externally from the member's perspective. We now have the ability to provide a much higher level of service to members in a much shorter timeframe."

HPE Content Manager offers users a single and familiar interface. For those needing to do a query on a member record, users simply enter a member number via the quick search bar. Users can then view and browse all related historical data for that particular member.

Hill explains that this is very different to what used to take place. "When using one of the legacy applications to view scanned images, users would only be able to view one document at a time and would need to open and close each document before being able to proceed. In some cases, member files could contain hundreds of documents and this process was both time-consuming and frustrating. Now users can open the HPE Content Manager preview pane to quickly locate the documents required. This feature alone has improved the user experience and saves time, meaning we can respond to member queries faster."

"In addition, users previously had to print information from our legacy systems because it was difficult to view the files. Since the HPE Content Manager Viewer is so easy to use, we have significantly reduced printing, which has benefited our overall paper reduction strategy.

Customer at a glance

Software
- HPE Content Manager

Improving information integrity and corporate accountability

Using HPE Content Manager, RBF has preserved information integrity and enabled corporate accountability.

Hill says, "Today, RBF must ensure the authenticity, accuracy, and source of information used in day-to-day business activities, while facilitating secure and audited access to our employees or users.

"HPE Content Manager provides strict security and access control to all managed member documents and records. Only authorized users are able to access the information, which protects us against inappropriate access and misuse. In addition, we have the ability to capture and log events, while preventing changes to the historical data. "Overall, HPE Content Manager has significantly reduced risks for RBF by improving information integrity and corporate accountability."

Meeting the demands of regulation

The obligations of operating in the superannuation industry are vast. RBF needs to meet both internal governance and regulatory compliance requirements.

HPE Content Manager gives RBF the ability to automatically apply security, retention, and disposition policies together with rules to member documents and records to achieve compliance initiatives. It is designed to ISO standards and supports all major regulatory standards.

Hill says, "Today, RBF is confident in the quality and integrity of HPE Content Manager. We know that all historical member information is contained in a secure location, and we have a complete audit trail available at the touch of a button.

"We couldn't be happier with the outcomes of this project. By implementing HPE Content Manager as our member records and document management system, we have gained a single version of the truth. In the process, we have successfully migrated data, ended the life of five legacy applications and consolidated our records. This has reduced operational costs significantly, dramatically improved productivity and customer service. More importantly, we now have a common interface to access all member records, which are contained in the one central system.

"As a result, RBF has become a different organization. We are a lean, agile, and efficient company that has built a solid foundation on an information governance strategy based on the power of HPE Content Manager."

Learn more at
hpe.com/software/ecm

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