U.S. Department of Education implements document best practices

With HP TRIM, department agency digitizes documents for faster access, regulatory compliance, lower operational costs

U.S. Department of Education

With thousands of paper documents now digitized, staff within the U.S. Department of Education Office of Special Education and Rehabilitation Services can more easily access files—and more quickly act on their contents. Operational efficiency is improved, and the office's document management standards now conform with industry best practices.

HP customer case study: HP TRIM software enables best practices-based document management and access delivering staff and operational efficiency

Industry: Public sector

Objective:

Improve management and accessibility of large repository of documents

Approach:

Digitize paper records; combine with existing electronic records in a centralized document database

IT improvements:

- Documents are now centralized
- Documents easier to manage, access, update
- Project officers can access grants records from their desktops
- Project officers can retrieve grants records remotely via Citrix
- Improved search functionality through document parsing
- Search result order listings integrated into search functionality

Business outcomes:

- Supports agency's goal of best-practices based document management
- Fast implementation
- Improved staff efficiency, operations
- Complies with federal regulations, including Section 508 of the Rehabilitation Act

Each year, the Office of Special Education and Rehabilitation Services (OSERS)—one of the eight departments of the U.S. Department of Education (Dept. of ED) that administers education grants to academic institutions—awards approximately $3.8 billion to research institutes, educational facilities, and other entities that support special education in the United States.

Managing the associate grant review and dispensation processes is highly document-intensive. OSERS' official paper Discretionary Grants files, for example, number in the thousands. Resumes in its Peer Reviewer Resume Files collection can run up to 60 pages apiece.

To make its document management processes more efficient, OSERS decided to convert its paper files to electronic format and create a centralized repository for all of its digital document files. So with the help of SCI Consulting Services, Inc (SCI) and Creative RNP Solutions, leading providers of scientific, engineering, systems integration and technical services and solutions, OSERS implemented HP TRIM software.

Fast to implement, meets federal standards

SCI recommended TRIM because, as HP's best-practice document and records management solution, the solution supported all the project requirements—many right "out of the box." HP TRIM is quick to implement. It is designed to federal government standards, including DoD 5015.2 Records Management compliant and complies with Section 508 of the Rehabilitation Act, which requires access to electronic and information technology procured by Federal agencies.

An initial pilot proved a success, and the program was expanded to digitize all of OSERS' Discretionary Grants files. First the project team imported grant data from the Education Department's financial system into the department database; it then took less than a week to install, configure and load HP TRIM with metadata. The National Rehabilitation Information Center (NARC) thesaurus was also loaded into HP TRIM. This simple integration created a powerful tool that enabled project officers to access grant files electronically.

In conjunction with the full project roll-out, over 100 project officers were trained in the use of the TRIM software.

Records now centralized
OSERS next wanted to automate its Peer Reviewer Resume Files. For this project, the team used HP TRIM, Content Analyst, and Resume Mirror to design an initial profile of desired attributes for potential peer reviewers. Next, the Peer Reviewer Resumes were centralized into the TRIM system as individual records. Resume Mirror was set up to parse the resumes, and Content Analyst was configured to perform conceptual search, document summarization and rank order listing of search results. With this setup, an entire resume is used as the search tool.

With the system in place, OSERS imports electronic resumes directly into the PRS database. It scans paper-based resumes and then imports them.

Over 2,500 highly specialized resumes are now centrally available to all project officers for use in creating their funding slate prior to grant solicitations. Because they are in electronic form, project officers can swiftly scan the summary of the resumes without reviewing lengthy resumes in their entirety.

The centralized record of each Peer Reviewer in TRIM gives a history of the reviewer's performance; formerly this history was not available. It also selects reviewers on an unbiased basis.

### Saving time, knowledge sharing through best practices
Deploying HP TRIM software has delivered a number of benefits to OSERS. The agency's project managers can manage both electronic and physical applications on one platform over the office network. Within HP TRIM, they can access electronic files directly or use barcode records to locate physical files quickly. This enables OSERS to track file usage, and prevents files from being misplaced.

Better electronic access also improves knowledge sharing among teams and organizations.

The ability to access files electronically delivers a number of benefits. Previously, project managers had to go to a central file room and request paper files. Electronic access saves considerable time. It also eliminates the need for officers to carry paper files, some of which were very heavy, posing a problem for workers with disabilities. And project managers no longer create and maintain duplicate files in order to avoid having to transport paper files.

The HP TRIM solution was fast to deploy, easy for employees to use, and cost-effective—while delivering labor savings and more efficient use of project officers' time.

The Department of Education IT Infrastructure was recently standardized on a Microsoft® Windows Vista® Operating System and the Federal Desktop Core Configuration. This caused OSERS to upgrade all TRIM software. SCI and Creative RNP performed the upgrades and did the integration within the time and budget constraints without disrupting any business functions at all. In addition, the system remains Certified and Accredited and is helping OSERS meet their new challenges.
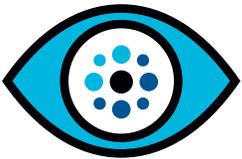
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