



“Find the information you need quickly with integrated document and records management ”

Burntsand Inc. Enables electronic workflow for document approval and electronic records management

Situation

- **Old System:** Review and approval of final documents was a manual process. A Reviewers checklist was attached to the document and the document was passed around. Understanding who had the document required constant follow-up by the Case Manager (or where possible the CM would stay by the reviewer until he/she completed their review and hand the document to the next reviewer). Once the document was issued, a copy of the document would be saved to a separate shared directory for upload to the corporate website for Public access.
- **Records management:** Records retention and disposal mainly for hard copy files. Electronic records were not disposed of. Recent changes in records management policies for Crown corporations required that electronic records were to be disposed of as well.

Solution

- **Document Approval:** Burntsand configured and implemented the Tower TRIM Context RDMS as an integrated application with the Pivotal CRM. The Board can now access documents and kick off workflows, using the TRIM application, from within Pivotal. Case Managers can access the workflow at any time to understand who had the document and, when necessary, advance the review process. Roll-back functionality can be also used when reviewers disagree with the changes they are reviewing. The electronic approval (audit) is saved with the document.
- **Public Access:** Once the document is issued, a simple change in the security level of the document enables ‘public’ access through the TRIM Webdrawer application.

Benefits

- **Flexible and reliable document management functionality:** Case Managers can view the workflow at any time to understand the status of the document. TRIM was the official document repository hence staff knew the latest revision of the document can be found in TRIM, even if multiple versions existed elsewhere.
- **Records management:** Enable electronic records management.
- **Online:** One-click function to enable public access. Search functionality on Webdrawer is more robust than the previous document search functionality - providing different search methods: Issue Date, by Case Number, Document Content, Title, Applicant.

Company:

Burntsand Inc.
www.burntsand.com

Vertical Industry:

Energy, Utilities

Segment

Midmarket

Country/Region

Canada

Software & Services

Pivotal CRM and Pivotal e-Service
HP/Tower Software TRIM Context RDMS
HP/Tower Software TRIM Webdrawer
Microsoft Windows Server 2003
Oracle Database