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Case Studies

Monterey County, General Services Agency

Information Technology Group's software and ongoing support has been utilized for Monterey County's new Records Management Program and Record Retention Policy for all County agencies. A Board of Supervisor's mandate required the development of a system that would ensure consistent management of all county records under the highest records management policies and procedures. With this goal in mind, Monterey County selected Information Technology Group's Advantage/WebAdvantage, a web-based software, to manage and maintain incoming records. ITG provided training for the applications within the records center and county-wide, facilitating inter-departmental records requests via their intranet.

Ventura County, Human Services Agency/General Services Agency

Since 1994, ITG has been delivering consistent, professional Records Management Consulting Services and Technology recommendations to Ventura County. Since the beginning, ITG has guided Ventura County's Records Management Program to higher levels of performance by creating new and innovative records management software that meets and exceeds Records & Information Management Industry standards. As a result of ITG's consulting and software development, the General Services and Human Services Agency's records programs have been successfully consolidated into one comprehensive records depository. ITG's Advantage/WebAdvantage Software has been instrumental in facilitating the County Records Center's growth, which has expanded from a few thousand records to over 1 million records today.

PFF Bank and Trust

Information Technology Group has a long-standing professional relationship with PFF Bank & Trust (PFF), assisting its Records Management Department for the past 15 years. ITG has provided vital services in a number of capacities, including RIM and Technology Consulting, as well as provider of automated technology for its Records Management Program. Using ITG's Advantage Records Management Software, PFF has enhanced its Records Management Department, supporting its administrative, enterprise-wide function and daily operations of its Corporate Records Center.

City of Stockton Public Works Department

This department needed assistance with their central file area. They had automated their files but were still unable to locate and retrieve records efficiently. Since the automated system did not function properly, the manager of the central file area reverted back to using a Rolodex Card System to maintain the file information. Other staff members hid their files in their own areas in their attempt to

keep them from falling into the "black hole". It was ITG's responsibility to evaluate the current records management program and determine the cause of the problems. ITG conducted a workflow study to determine the department's subsections unique filing needs. Through this workflow study we learned that each subsection had their own daily work requirements and needed to file and maintain their records differently from other sections. We then reviewed the current filing system within the central file area and determined that "all records" for "all subsections" were being filed by "one file classification method." This was not the answer as each individual subsection's business was different. ITG wrote an extensive report outlining the needed changes and recommendations for each section.

The above information is just a small sample of the type of records management consulting services that ITG has provided for its clients. Please contact us for more information on other projects or a list of references.