



CITY OF DURHAM, NC

Paper Chase Eliminated in the City of Durham

According to the U.S. Census Bureau, the city of Durham, North Carolina, is composed of more than 200,000 citizens. Issues, problems and other concerns arise and are considered and acted upon by the Durham City Council, which convenes at two City Council meetings a month and two work sessions. Each meeting is comprised of between 40 - 60 items which can be anywhere from a page to 200 pages. Typically, each agenda is comprised of hundreds to thousands of pages, including supporting documents needed for each item. Those documents have a cycle they are required to go through before they can be discussed in a public forum.

The manual process was detailed and very difficult to manage. One person, the agenda coordinator, was the focal point where the agenda would come together. Documents would be compiled and then sent to 22 departments city-wide for input. When the process began, the agenda item would go to the budget office to determine if funds were available for the request and the budget office would review the proposal. The Finance Office would also need to review the material and would wait until the budget office finished its review. If at any time in this process a department had a question or wanted clarification, the item would go back to its office of origin. The City Attorney's Office would review the proposed item third and so the cycle would go. The process was cumbersome and time consuming. Many complaints arose from departments claiming they were not receiving documents on time, or at all, and that bottlenecks were the reason for setbacks. All of the confusion and frustration made it clear that something had to be done to aid this process.

After analyzing options, it became clear automating the tasks using an electronic system would ease the agenda compilation process. Information Access Systems (IAS), an authorized OnBase solution provider, stepped in to help. Developed by Hyland Software Inc., OnBase is an integrated suite

of enterprise content management (ECM) software solutions, including core capabilities in document imaging, electronic document management, workflow, COLD/ERM and records management.

Before the installation of OnBase could begin, it was necessary to analyze the current business process and flow of tasks. A request form would be submitted to the agenda coordinator. The request document was used as a position filler while supporting documentation was gathered, assembled and processed through the required departments. Submissions of these documents had to be completed two weeks to one month before the Council meeting date due to the amount of work and processing. When the agenda item packet had been modified and approved, the packet was sent to the assistant city manager for management approval. After all of the approval steps, the agenda items would be presented at a work session where additional changes could be made. Many modifications and work from a large number of employees contributed to the final product: the Durham City Council Meeting Agenda.

Organizing Business Processes and Implementing Electronic Document Management in Just Two Months

Once the process was understood, problems surfacing during the manual agenda process could be addressed. Agenda items could have hundreds of pages of supporting information. All of the pages needed to be together to evaluate the item, and that was not the case before the OnBase solution. Some of the documents, including comments or notes pertaining to an issue, would be separated from an item and would cause a delay in the process.

Agenda items were passed from department to department. Knowing which department or employee had the documents and their status was virtually impossible to track using a manual process. Complaints came from

AT A GLANCE

Organization was essential in the process to compile the Durham City Council meeting agendas. All 22 departments that are actively involved in creating agenda items needed the capability to streamline information, enter documents into a workflow and distribute work to other employees.

BENEFITS

- Supports access to multiple concurrent users
- Provides an audit trail and status of items that will comprise the agenda
- Decreases time in the review process since documents are available electronically
- Complete agendas are kept intact and together to ensure that items are available before the meeting
- Items that need approval before they are applied to the agenda can enter a workflow to notify the needed departments
- Saves paper as hundreds of pages per agenda are not printed for review
- Increases employee productivity by eliminating the need to distribute physical documents

APPLICATIONS

- Agenda Automation

ONBASE SOFTWARE

- Desktop Document Imaging
- CD Authoring
- Document Imaging
- EDM Services
- Document Import Processor
- E-Forms Module
- Full-Text Indexing Server for Microsoft[®]
- Batch OCR
- Workflow

departments waiting to examine the item. Never knowing how long it could take to evaluate the documents, the time allotted for review was inconsistent, causing bottlenecks in the process.

The City of Durham's process was wasting paper and precious time. All 22 departments received complete agenda packets along with council members. The departments did not need to see all of the items, just the items they were involved in compiling; therefore, pages upon pages did not need to be wasted. Time was wasted because not all of the offices were in a centralized location; remote offices also were involved in the process. Each time a document needed reviewing or updating, an employee would have to make a trip to the main facility. Updates were made frequently, which meant rather than being able to compile the agenda, the agenda coordinator had to make corrections and get them to the proper departments for re-evaluation, compounding the amount of time and paper used.

Enhanced Productivity and Increasing Potential

Turning problems into solutions with the implementation of a host of OnBase modules has created a new, easy-to-use environment for the City of Durham. The City of Durham has approximately 500 employees who interact with OnBase. These employees needed to learn how to properly collaborate with OnBase, import documents, understand the workflow process and the document management capabilities. Fred McCurdy, the City's IT Department Imaging Coordinator, teaches classes so employees can get up-to-speed with the OnBase solution.

Since the implementation three years ago, McCurdy has been teaching two classes. One class teaches use of the Workflow module and the other class expands on OnBase's document management capabilities. During the first eight months after Durham went live, two classes were taught per month to accommodate all of the users. A monthly class is offered now to new employees but also as a refresher course. "More than one-third of the users are so interested they have gone to additional classes," McCurdy explained.

By implementing the OnBase Workflow module, which streamlines collaboration and business processes while it accelerates the completion of critical business tasks, documents are routed simultaneously through the departments of the City of Durham business process. The

issue of keeping physical documents together is an issue of the past. OnBase manages all relevant documents including notes, comments and versions. The OnBase Workflow rules and actions guarantee documents are distributed in a standard and controlled manner ensuring that business rules and practices are followed. OnBase Workflow can prompt users for input via e-mail or automatically process documents based on information such as a keyword, the type of document, when the document arrived, the presence of a supporting document or information from a line-of-business system.

Tracking documents and their status in departments is also an issue of the past. Utilizing defined security rights, only those granted with the ability to modify, read or print, for example, can alter the document. Multiple versions are tracked to know what changes were made and by which user. An e-mail alerting users of updates to a document or an approaching deadline is sent from the configuration of a timer and defined rules and actions.

Mr. McCurdy has seen the agenda process before and after the OnBase installation. "File cabinets were devoted for storing items, and it ensured back-up was maintained. We are in the process of eliminating paper, but we are not quite there yet. OnBase is stable, and people say a lot of great things about it." All information pertaining to a council meeting or a working meeting can be found in OnBase. Searching by any number of criteria — meeting date, department, title, or request number — any item of a meeting or an entire meeting is readily available at the users' desktops.

McCurdy explained, "I have been very pleased overall and from an administration level. OnBase's robustness is incredible. It has performed well above any expectation I could have had. The potential of OnBase in our organization, or any organization, is unlimited."



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