

Comprehensive Electronic Document Management and Online Capabilities Streamline City of Oakland Agency



“WHEN A CONSTITUENT NEEDS OUR SERVICES, THEY DON'T HAVE ANY CHOICE BUT TO DEAL WITH US. WE'VE EMBARKED ON A SOLUTION THAT PROVIDES AN EASE OF ACCESS TO OUR SERVICES AND THE PERMITTING PROCESS—MAKING INFORMATION BOTH IMMEDIATE AND TRANSPARENT.”

—Claudia Cappio, Director, Planning & Building Services

ORGANIZATION

City of Oakland, California, CEDA
› www.business2oakland.com

INDUSTRY

City Government

SOLUTION

Enterprise Content Management
Web Content Management
Integration with CityView Application

CHALLENGE

- › Long wait times for constituents requesting information from CEDA
- › Archaic Permit Tracking System is difficult to use, maintain & train on
- › Physical storage enormous and widely dispersed
- › Time-consuming, error-prone, untraceable manual document routing
- › Non-uniform CEDA Web sites experience delayed updates

KEY BENEFITS

- › Immediate access to information
- › Content management infrastructure can be leveraged city-wide
- › Enterprise-level repository for content of any format or origin
- › Immediate retrieval of documents and content improves productivity, employee and customer satisfaction
- › Savings in administrative cost for permit review and approval
- › Automated workflow tracks application at any point in process
- › Secure, 24-hour online access
 - › CityView functionality online
 - › Search for property documents
 - › View video of committee meetings
 - › Chatroom for real-time assistance
 - › Collaboration model provides interactive space for project planning

Located in Northern California, Oakland is a major West Coast port, home to several Fortune 500 companies and nearly half a million people. The City has experienced an increase in population, attributable to economic recovery and a plan to attract 10,000 new residents, resulting in vigorous development.

To improve services to its constituents, Oakland's Community Economic Development Agency (CEDA) has embarked upon a major initiative to advance information management, through the addition of an enterprise platform. The system has the potential to change everything about how the City of Oakland does business—how they interact with their constituency and how the public interacts with government.

Once completely integrated, the new multi-phase project will create a transparent environment which will enable:

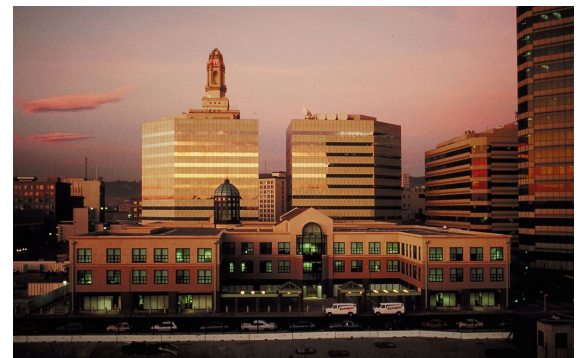
- › Immediate access to information
- › Constituent self-service
- › Accuracy and timeliness of City services
- › Online portals & collaboration space
- › Unified/standardized web sites
- › Streamlined internal processes
- › Departmental interoperability

One Agency's Vision Has Potential to Benefit Entire City

CEDA is responsible for growth and development throughout Oakland. The consolidated functions of the Agency include planning, zoning, building services, economic development, redevelopment, housing and community development.

The Agency initiated infrastructure that will be capable of providing content management efficiencies for the entire city, and all of its agencies.

Operating with an archaic system for retrieving documents—some dating back to 1910—processes are complicated by a manual workflow and state-mandated processing times. The outdated tracking system is difficult to support and no longer provides effective functionality for CEDA.



“We've been in somewhat of an emergency mode for the past six years, trying to get the approval process for permits caught up”, comments Scott Miller, CEDA Planning & Zoning Manager.

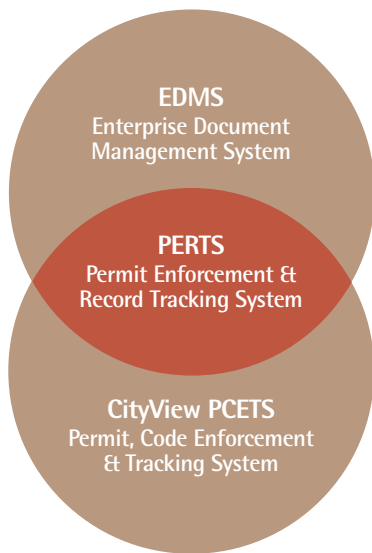
To provide a software platform to address departmental workforce activities, CEDA selected Municipal Software's CityView. While CityView provides specific functionality, from permit generation to code enforcement, the Agency also recognized an essential need for core Enterprise Content Management infrastructure. They sought a service provider who would provide a multi-faceted ECM system that would tightly integrate with CityView.

Multi-Phase Project Trusted to ImageSource

After thorough research starting in year 2,000, the enterprise initiative was approved by the Oakland City Council in 2004-2005. ImageSource® was selected as the vendor of choice to design and implement the content management system. In addition to the integration with CityView, the initiative was expanded to fully utilize the capabilities of ECM technology to improve various business processes.

“IMAGESOURCE DEMONSTRATED THE ABILITY TO MEET THE TECHNOLOGICAL REQUIREMENTS BETTER THAN OTHER VENDORS EVALUATED. THEY ESTABLISHED A LEVEL OF COMMITMENT AND EXPERTISE THAT ALLOWED KEY DECISION MAKERS TO MOVE FORWARD.”

—Mohssen Yassini, Project Manager II, CEDA Projects
Department of Information Services



The ImageSource solution was designed to include the following components:

- › Document capture & management
- › Universal Content Management
- › Web Content Management
- › Online collaboration
- › Online Portals
- › eForms library
- › Workflow, both simple and complex
- › Records management

Expediency Constrained by Archaic System

Traditionally, CEDA has stored and retrieved all of its paperwork, applications, permits, and inspections manually. They are routed through multiple levels of authorization, and several departments, for review and approval. Copious quantities of paperwork consumes desk space and files and turn-around time is drawn-out.

Customers are required to come into the office, take a number and wait to submit applications, request permits, pick up forms or research property history. In order to fulfill requests, the Agency is dependent on an archaic tracking system, microfiche and 4" x 6" card files to let them know where to find physical documents. The physical documents—case files, conditional-use permits, maps and variances—are housed in various places within the building and

at several off-site locations, including an Army base. Once a request is received, the process for tracking down a document, and successive approval, can typically take weeks, sometimes months.

Integrated Electronic Document Management with Permit Tracking Systems

ImageSource answered the challenge with a state-of-the-art, fully-integrated Electronic Document Management System (EDMS) with associated hardware, back-file conversion services and maintenance. It will integrate fully with the new Permit, Code Enforcement, and Tracking System (PCETS), provided by CityView software. When completed, EDMS and PCETS will combine to form Permit Enforcement and Record Tracking System (PERTS), a major advancement for CEDA.

The base archiving system utilizes Kofax Ascent Capture to capture newly generated paper documents, in conjunction with ILINX® to deliver a total capture solution. ILINX Import injects any electronic document, such as faxes and data feeds into Kofax for validation. ILINX Release Script pushes all images/documents to an Oracle IPM repository.

ImageSource ILINX enables the capture solution and repository to seamlessly integrate with CityView. Documents created within CityView will also be stored in the secure IPM system. Once integrated, other City departments will also be able to access the content in this universal infrastructure.

ImageSource's tight integration allows users to take advantage of the superb functionality of each component while staying within the CityView interface. This promotes user adoption, while requiring less training and fewer IT services.

A combination of services, provided by ImageSource, enables Oakland to convert existing paper and film to electronic documents. The specialized conversion of Microfiche was handled at ImageSource's corporate conversion center. ImageSource also set up several on-site scan centers at Oakland, to allow City employees to economically convert paper documents.

Accurate, Efficient Permitting, Planning & Information Services for Constituents

By transforming physical documents, and associated data, to digital images, Oakland will be able to reduce administrative costs through increased productivity. They are looking forward to a reduction in the number of errors associated with manual filing processes and the improved security that the new system will provide.

Finally, there is little doubt that customer satisfaction will greatly improve. The ability for employees to immediately access all documents associated with a property, will translate to faster responses to public questions and inquiries. The research process to obtain documents required for permit review and approval that took weeks will be reduced to days, even hours. City workers will be able to locate a permit at any point in the workflow, a feat that is hardly probable with the old paper-based process.

Another key benefit, expressed by Director Claudia Cappio, “When an employee begins to see their part in the larger process of a city service, their whole attitude changes. They begin to see that they are an important piece of what happens. Their understanding of the process increases. It creates better trained employees in the best sense.”

One of the most valuable benefits to the City will be the ability for all departments and agencies to utilize the Enterprise Content Management system put in to place for CEDA. Oakland now has true infrastructure for content with the ability to manage and share critical information and documents across departments and disparate systems. As it did for CEDA, ImageSource Professional Services, utilizing ILINX software, can connect each department’s line-of-business systems with the ECM platform.

Web Content Management Infrastructure Unifies Web Sites City-wide

A by-product of growth and changing technology, numerous Web sites have proliferated organically to meet the needs of many departments, groups and programs.

Each having a unique look, City Web sites lack uniformity. Although many CEDA sites have different people creating pages or gen-

erating content, the City WebMaster is the conduit for applying all revisions, resulting in bottlenecks and delayed updates.

To create a uniform City Web presence and efficiency in the Web authoring process, Oracle Web Content Management (WCM) will be utilized. ImageSource has provided the infrastructure that will allow the City to apply and enforce their new design standards across the Enterprise, creating a consistent look and feel.

Contribution capabilities will be extended down to end users, allowing those employees who generate content to update Web sites via a simple workflow process. Content will be submitted electronically. Once approved, the update to the Web will be expedient and systematic.

“ WE EXPECT CONTENT CAN BE POSTED TO THE WEB WITHIN HOURS AFTER IT’S COMPLETED. ”

—Rick Nemcik-Cruz, Program Manager, Rent Adjustment Program, City of Oakland

Multiple Services Provided through the Internet

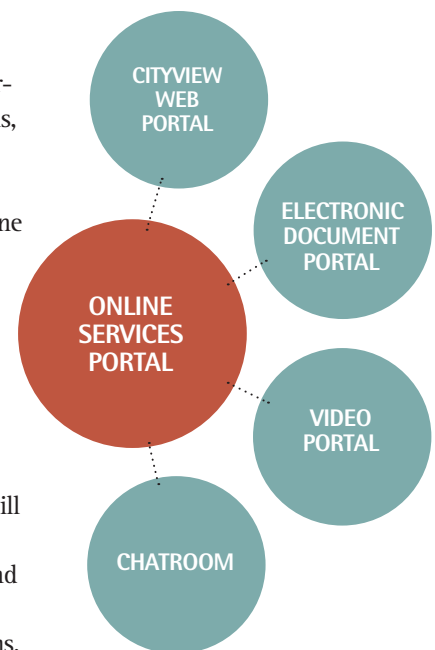
Expanding on internet capabilities, ImageSource has designed a unique solution for CEDA using online services portals. Providing the exchange of information through several distinct channels, ImageSource’s ILINX Portal Exchange allows the exchange of documents and information across platforms through one access point.

These online services include CityView Web Portal, Electronic Document Portal, Video Portal, and Chatroom.

Online Self-Service with CityView Web & Electronic Document Portals

Having documents in electronic form will allow CEDA the capability of providing PERTS information online to citizens and business customers. Portals will provide 24-hour access to information and forms.

The CityView Web Portal self-service feature will allow constituents to access processes that the line-of-business software provides, including permitting, inspection, planning and code enforcement.



The Electronic Document Portal will enable constituents to launch a search by address or parcel number to find information relating to that property. The system will search Oracle IPM for documents in the repository that match that address/parcel number.

Constituents will be able to view selected documents, and if needed, request official watermarked copies from the City.

Video Portal Allows Constituents to Virtually Attend Meetings

Using the Digital Asset Management (DAM) module of Oracle UCM and ILINX Portal Exchange, ImageSource designed this unique capability to bring official City meeting to the desktops of constituents. The public will be able to access recordings of commission sessions. This service can potentially be expanded to provide video from any type of event.

Once contributed to the DAM repository, recordings from meetings are available for the public to view. The viewer simply clicks on the video page and decides what meetings they want to see. Search capabilities display dates and times of meetings that match the search criteria. Videos are automatically segmented into 10-minute clips so that the viewer can start watching from a specific point in the meeting.

Chatroom Drives Efficient Communication

The Chatroom Portal will provide the citizens of Oakland a means to talk live with select City employees. For example, a constituent who is undergoing the permit application process, can get questions answered real-time by a permit technician. This will allow communication without long wait times or trips to the agency.

Online Collaboration Management Facilitates Secure, Real-time Discussion

To provide Planning and Zoning a virtual collaboration space for project teams, ImageSource utilized UCM's Collaboration Management. With documented discussion threads surrounding content and documents, the model allows projects to be processed extremely efficiently.

Through ImageSource's solution, Planners will be able to initiate and post a project, including permissions to provide security.

Says Tanya Boyce, CEDA Planner, "I'm excited about being able to orchestrate and launch a project within our department, without having to rely on outside resources. Everyone on the project will now have immediate access to all pertinent information."

Internal and external players, such as architects, contractors and attorneys are provided a secure place to access information related to a project and communicate with all participants. Documents relating to projects including Architectural drawings, environmental impact studies and project plans are available for viewing and approval. When a new version is checked in, all subscribers will be notified. A version history and discussion threads provide elaborate detail associated with each document.

Accelerating Processes through eForms

The next phase scheduled at Oakland is the incorporation of electronic forms. Using Cardiff LiquidOffice, ImageSource will identify a multitude of forms that are currently executed on paper. The forms will be published on the Web and stored in an Oracle repository through the ILINX Connect to eForms.

“ WE SHOULD BE THE BEACON OF LIGHT FOR THE BAY AREA— SHOW OUR COUSIN CITIES HOW TO DO IT RIGHT. THESE TOOLS WILL MAKE US POLISHED AND PROFESSIONAL, AND GIVE PEOPLE LOTS OF CONFIDENCE WHEN THEY COME TO US. ”

—Tanya Boyce, CEDA Planner

ImageSource Provides Multi-Faceted ECM Solutions for Improved City Processes

By utilizing integration tools such as the ILINX Product Suite, ImageSource is able to seamlessly integrate content management and line-of-business components to benefit all constituents in the City of Oakland as they interact with the many different departments within the City.

Technology Provided



IMAGESOURCE ILINX PRODUCT SUITE

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