

Pierce County Integrates Existing Applications & Implements Automated Workflows to Speed Processes



ORGANIZATION

Pierce County Assessor Treasurer
www.co.pierce.wa.us

INDUSTRY

County Government

SOLUTION

- › Automated Workflow & Image-Enable Existing Systems

CHALLENGE

- › Large amounts of paper being processed and stored
- › Routing of both hard-copy and electronic forms
- › Labor-intensive, manual employee processes, including retrieving and processing tax forms
- › Inefficient and costly processes
- › Duplication & little version control

KEY BENEFITS

- › Regained 250 square feet previously used for physical storage space
- › Employees access file from desktops
- › Reallocation of employees
- › Greatly reduced time for processing, including filing & retrieving
- › Reduction in paper and staff time
- › Reduction in manual routing and employee errors
- › workflow created and routed through existing applications
- › Maximized system functionality

“OUR EMPLOYEES ARE SPENDING SIGNIFICANTLY LESS TIME FILING, RETRIEVING & PHOTOCOPYING DOCUMENTS. THIS MEANS ADDITIONAL TIME TO CONCENTRATE ON THE MORE IMPORTANT ASPECTS OF THEIR JOBS. OVERALL, THIS HAS ALLOWED US TO STREAMLINE PROCESSES AND BECOME MORE EFFICIENT.”

– Billie O’Brien, Administrative Officer, Pierce County Assessor-Treasurer

Pierce County, Washington, is home to the state’s second largest city, the U.S.’s third largest army base and the fertile Puyallup Valley. It encompasses the scenic Narrows Passage of Puget Sound and stretches southeast to include Mount Rainier.

The Assessor-Treasurer at Pierce County, Washington is responsible for uniform and equitable valuation of property within its borders. Additionally, they are responsible for the timely billing of taxes used to fund essential government services within the County. The staff assesses more than 320,000 real, personal and mobile home properties every year. In addition, the Assessor-Treasurer calculates the tax rates for more than 120 different taxing districts. It bills and collects over \$1 billion in property tax payments annually.

The Assessor-Treasurer’s administration set a goal to reduce the amount of paper that was being processed and stored within the office. In the past, records were manually routed from person to person in both hard-copy and electronic formats. The Office wanted to handle paper documents only once and regain as much physical office space as they could. These objectives would require that they receive and share documents electronically whenever possible.

Manual Processes Consume Manpower

One manual process the County was looking to overhaul required employees to go to the auditor’s office every day and pick up a stack of excise tax forms that were filed the previous day. Once back, they would process the forms, make

notes and photocopy them for others in the office. It wasn’t unusual for the documents to be copied up to seven times.

To locate a file in process, employees would physically go ask another employee for the document. Once in hand, a personal copy would be made. Because of this, the County ended up with numerous duplications, and no practical way to track versions.

When a records request came in for a particular document on an account, a Public Records Officer would have to go through every office or every work group to collect the documents related to that account.



Vision Includes Processes & Performance

The County was looking for more than just an electronic filing cabinet. They wanted to improve the flow of information throughout the office through automated workflows. They were also looking for quicker access to documents, faster system processing, elimination of employees passing paper back and forth, and the ability to track employee perfor-

mance. Performance measures would allow the County to have real-time information about what employees were working on, and how long it was taking them to complete specific tasks.

Solution Includes Automated Workflows & Image-Enablement of Existing Systems

Pierce County wanted to be sure that they received the most cost-effective, efficient solution. Partnering with ImageSource®, the County was confident that the Integrator would solve the designated business problems and at the same time, improve service to constituents.

The solution would have to integrate with existing technology, allowing the Assessor-Treasurer to create and route workflow projects through those applications. The County also wanted to image-enable their tax system, appraisal system and geographic information system (GIS).

ILINX®, Oracle IPM & Kofax Installed

ImageSource integrated Oracle Imaging and Process Management (IPM) and Kofax Capture to streamline multiple business processes. To maximize the functionality of the system, ILINX Export effectively connects the various software platforms. In addition, ImageSource developed two custom, automated workflows using Oracle IPM.

The new document management system reduces paper handling and manual routing, reduces errors and speeds processing for the multitude of required documents and forms the County deals with.

“OUR STAFF LOVES THE ABILITY TO SEARCH FOR AND RETRIEVE DOCUMENTS RIGHT FROM THEIR DESKTOP. I HEAR COMMENTS EVERY DAY FROM OUR USERS TALKING ABOUT HOW MUCH THEY BENEFIT FROM THE SYSTEM.”

— Mike Johnson, Information Technology Specialist
Pierce County Assessor-Treasurer

Desktop Access Provides Multiple Benefits

Pierce County has realized immediate benefits from the new ECM solution. For the first time, staff members have instant desktop access to whatever they need, without having to physically seek out files. Packages are now routed the same day, in what would have taken one

week with the old, manual process.

The Assessor-Treasurer's Public Records Office also saw a huge benefit from the solution. Now they can search for documents from their desktop. Not only does this provide a huge leap in efficiency, but it aids in compliance and improved records management protocol.

Space Reclaimed & Employees Reallocated

Through the success of the implementation, the County has been able to eliminate a significant amount of physical storage space. Close to 1.2 million pages of content—more than 30 filing cabinets—were eliminated and 250 square feet of office space repurposed.

Additionally, Pierce County has been able to make better use of staff and resources.

“A procedure that once took a day for two full-time employees to complete, now takes one full-time employee less than four hours, said Mike Johnson, IT Specialist, Pierce County Assessor-Treasurer.

Phased Approach & Backfile Conversion

Pierce County first went live with five imaging applications and two workflows. They now have 21 imaging applications and 10 workflows. This phased approach has enabled a comfortable adoption schedule, without overwhelming end-users and technical staff.

Critical to the success of this project was the scanning of paper backfiles that took place prior to going live with the new ECM system. ImageSource provided conversion services, scanning more than 1.1 million pages of Pierce County's paper. Known for secure, local, compliant conversion, ImageSource provided high-quality digital versions of paper documents, and the associated index values. Having this data available in the new system has enabled employees to immediately access historic information from their workstations, saving time and money.

The solution, part of a larger implementation, is being expanded. Pierce County wanted the system to be cost-effective for tax payers, which they accomplished by leveraging what was already in place.

“This is the third major system our office implemented over the last six years, and this was by far the easiest and most painless,” exclaimed Johnson.

Technology



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