

Scalable ECM Technology Streamlines City of Richland Clerk Agenda Processes



“WHEN YOU INVEST IN THIS TECHNOLOGY, YOU’RE NOT JUST PURCHASING AGENDA MANAGEMENT. IT’S A BASE SYSTEM THAT YOU’RE ABLE TO APPLY TO MANY DIFFERENT BUSINESS PROCESSES.”

— Jon Amundson, Assistant City Manager, City of Richland

ORGANIZATION

City of Richland
www.ci.richland.wa.us

INDUSTRY

City Government

SOLUTION

- › Workflow for Agenda Management
- › eForms

CHALLENGE

- › Aging Legacy system
- › Paper-intensive processes
- › Manual routing for approvals laborious & expensive
- › Documents difficult to track
- › Duplication of documents
- › Agenda compilation labor-intensive and costly

KEY BENEFITS

- › Flexible workflow allowing various approvers depending on need
- › Documents easy to locate and always available
- › Eliminates document duplication
- › Changes are easily accommodated
- › Defined process facilitates one concise document with all reviews
- › Flexible workflow allows for adding approvers, editing and resubmission
- › Agenda ePackets are easy to build & distribute to Council & public
- › Reduction in physical storage
- › Reduction in labor costs associated with agenda preparation
- › Scalable technology to benefit entire organization
- › Improved services to constituents

Known for popular wineries, abundant agriculture and Hanford Nuclear Power Plant, the City of Richland is situated on the Columbia and Snake rivers in south-eastern Washington. The progressive, full-service municipality employs about 500 people to provide general government, public works, public safety, planning & community development, and recreational services to approximately 45,000 constituents.

Motivated by State requirements on records retention, public disclosure requests, demands for technological efficiencies and a desire to adhere to best practices, Richland moved toward effective management of the City’s information assets.

Noted for excellence in technology, Richland looked to an Enterprise Content Management solution. They embarked on a partnership with ImageSource® to enable document management systems to improve how information flows through the City.

City Clerk Struggles with Aging Systems

Launched in the City Clerk’s Office, the new system automates the agenda management process. Prior to the ECM solution, the City used an aging legacy system, combined with manual processes, to create, edit and finalize agendas for City Council meetings. Each department had a different process for routing information. The Clerk’s Office spent as much time manually tracking documents as they did reviewing content.

“Our legacy system allowed us to index to a certain extent, but it almost wasn’t worth it,” recalls Jon Amundson, Assistant City Manager, Richland. “The

interface was unfriendly, so it wasn’t being utilized. We were continually having storage issues on a system that was no longer supported.”

Agenda packets had to be manually bundled and stapled and sent to another facility for printing. The packets, consisting of up to 60 files, did not have consistent printing requirements. Some were printed in color, others in black and white. Labor for pre-printing was time-intensive and costly.



Agenda Management Undergoes Critical Business Process Improvements

Working with an ImageSource Professional Services team, the City discovered technology that could improve services to constituents without increasing head count, increase workplace efficiencies and serve as infrastructure for city-wide improvements.

A sophisticated, reliable, electronic workflow was implemented, streamlining a council agenda process that included multiple approvers/reviewers. The solution integrates ILINX® Capture technology, LiquidOffice eForms and

Oracle Image & Process Management. The ILINX Suite seamlessly integrates the various ECM technologies.

“Instead of spending most of our time tracking and recovering documents, we can now concentrate on reviewing the essential content proposed for council meetings,” explains Amundson.

To scan documents used in the agenda process, the Clerk’s office staff uses ILINX Capture. Effective in both a production and distributed environment, this technology will allow Richland to expand capture to a variety of scenarios in the future.

Moving away from the old paper-based manual process, Cardiff LiquidOffice electronic workflow enables Richland to route, review, approve and distribute City Council agenda documentation. When initiating an agenda item, a department submits an electronic form, attaching all associated documents in the native format. Items are electronically routed for approval to required managers, department heads, the City Manager, and finally, the City Clerk’s office for agenda preparation.

While in process, documents can be located within seconds, so changes are easily accommodated. Flexible workflow allows for adding approvers, editing and resubmission.

“We no longer have multiple versions being reviewed by different bodies, risking that all comments aren’t captured and consolidated,” states Amundson. “The City Manager or I, receive all the critical reviews in one concise document.”

“LOOKING AT HOW SCALABLE THIS TECHNOLOGY IS ACROSS THE ORGANIZATION, IT WILL STREAMLINE PROCESSES FOR ALL OF OUR DEPARTMENTS.”

—Jon Amundson, Assistant City Manager

ILINX Facilitates Agenda Building, Distribution & Contribution to a Repository

Agenda packets are easy to build and distribute to council members, and the public, using ILINX Export. Eliminating pre-print set-up, collation and post-print work, ILINX Export allows Clerk staff to assemble the agenda into one electronic document to be emailed or posted to the web.

At the close of City Council meetings, the status of each agenda item is updated to reflect the action taken on that particular item and processed through a back-end workflow. The City Clerk then utilizes the ILINX Connect for eForms to electronically store the documents. Facilitating effective records management, and easy retrieval, this tool enables the direct contribution of LiquidOffice electronic forms to the Oracle IPM repository for permanent storage. Because the IPM system is web-based, users can access it anywhere.

Training Paves the Way for Future Efforts

Essential training for the system was provided by ImageSource on site and at ImageSource University.

“We benefited from having both the business owner and the IT department attend technical training,” shares Amundson. “From IT’s perspective, it’s about setup, security and administration. I see it from a business process perspective and what it can achieve. You put the two together and you get a great synergy.”

Significant Benefits Now & in the Future

The City of Richland saw immediate benefits from the first phase of their ECM system. They have eliminated document duplication, significantly reduced physical storage space, improved retrieval capabilities and reduced labor costs associated with agenda preparation.

“The ROI for this project should result in positive numbers well beyond our initial investment,” explains Amundson. “Looking at how scalable this technology is across the organization, it will streamline processes for all of our departments.”

In the next phase, Richland plans to expand their ECM technology to Purchasing and Requisition, using ILINX Integrate to image-enable requisitions and invoices in the existing GEMS purchasing system.

In addition, Richland would like to expand ECM functionality into contracts management and an external public interface.

“We’d like our website to be more transactional—basically a virtual city hall,” explains Amundson. “The investment we’ve made in LiquidOffice, Oracle and ILINX will allow us to do so.”

Technology



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