ENTERPRISE CONTENT MANAGEMENT, WORKFLOW & CONVERSION SERVICES

ScerIS®

Liquid Edges, Solid Solutions

Since the Inspectional Services Department's initial deployment of ETCETERA® ECM (Enterprise Content Management)for their building permits and plans, use of ETCETERA® ECM for electronic content management has grown to encompass multiple implementations across seven city departments/units with interest continuing to develop.

Among the many reasons for this increase are improvements in efficiency, better utilization of office storage space, enhanced and easier access to records both internally between departments and externally by the public, preservation of historically significant records, as well as better service to constituents. These reasons mesh well with the Department of Innovation and Technology's (DoIT's) goal of providing innovative solutions that increase efficiency across and between city departments. The enterprise deployment of ECM also matches DoIT's strategy of promoting a shared services model. Finally, ECM serves DoIT and the City's broader objective of transparency and open government.

CITY OF BOSTON

ScerIS Solutions
Business Process Optimization

ScerIS Platforms
ETCETERA® Enterprise Content Management

ScerIS Products
Repository
Workflow

ScerIS Services
Scanning & Indexing Services
Image & Index Conversion Services
Custom Application Development
Custom Web Client Development
Host Integration - PeopleSoft
Host Integration - ArcInfo

ScerIS CM Benefits to the City

Business Process Optimization
- Eliminated lost, mis-filed and altered documents
- Eliminated handling of historical documents
- Provided secure desktop and web access to public and business records
- Provided secured desktop access to plans and large format drawings
- Improved management of plans and large format drawings
- Reduced processing times
- Increased effectiveness of employees
- Enhanced and improved constituent services
- Leveraged City of Boston software investment

Public-Facing Websites
ISD Link: http://sceris.cityofboston.gov/scerisweb/client/simplesearch.aspx
DPW Link: http://sceris.cityofboston.gov/sceriswebpwd/client/folders.aspx
LC Link: https://sceris.cityofboston.gov/sceriswebblc/client/simplesearch.aspx

Inspectional Services Department

One of the major functions of the Inspectional Services Department (ISD) is the management of all building permits. The permits, applications and other documents dated back to the late 1800's were stored in 3-fold file jackets within file cabinets and organized by the street address. The public had access to these documents by visiting the ISD location and having staff pull the file jacket(s) that the customer needed to research prior permits at the address. Customers would be able to research all of the documents within the jacket which lead to missing, misfiled or altered documents and with the constant handling caused a major deterioration in the quality of these one-of-a-kind historical records.

ScerIS partnered with ISD to build a solution using ECM to store these documents electronically, safeguarding the original records while also allowing public access to them at ISD or remotely via the Internet. ScerIS also performed all of the conversion services to scan and index all of the records within the jackets. Due to constant need for ISD to access these documents during the time of the conversion, ScerIS set up the conversion service center on location at ISD.

Today the demands on ISD personnel are much more manageable and the department runs with enhanced efficiency due to the ScerIS online document retrieval system. The documents in the system can never be lost, stolen or misfiled, preserving their historical significance and safeguarding them for generations to come.

Department of Public Works

The Department of Public Works ensures that the city's roads, streets and bridges are safe, clean and attractive. A large part of accomplishing this mandate is to manage thousands of large format plans and drawings of city streets, property and land layouts throughout the city. Any change to a city street or sidewalk needs to have drawings of the change approved by the Public Improvements Commission (PIC). With these drawings stored in the basement of City Hall – seven floors away from the department - it can be a long process to get the plans needed to complete department work in a timely fashion. An initial scanning project created digital assets from the plans but the files were too large to store on the DPW network.

A single copy on DVD's kept under lock was another approach but further limited the access if the manager was unavailable. Last, these files were named by the plan number with no additional information about the content and no ability to search for the required plans except inside the contents of shared Excel file that had among other information, the number of the DVD where the required plan was stored. The process was self-limiting and frustrating for DPW employees.

ScerIS expanded the city's implementation of ECM to transform the process and make these Plans accessible to DPW users in an index-rich and searchable environment. By converting the large file sizes to a more manageable format and size without loss of resolution, the images could be stored on the city's network and accessible across the desktop or across the world. ScerIS was able to enrich the indexing of these plans by importing content metadata found in the shared Excel file, allowing a full-spectrum search by the plan number, the description of the document, the street location and/or cross streets nearest to the map location. When an employee today needs to find a plan, it can be found in just a few keystrokes without leaving their desk and is displayed in seconds.

This solution has drastically increased the internal effectiveness of DPW employees, enhanced constituent services through remote access while DPW continues to add new plans to ECM.

Project 2 - Historical PIC Orders

The next project for the Department of Public Works involved the creation of a new ECM folder to electronically manage the Historical PIC Orders. These orders are getting scanned by a third party vendor. When the vendor delivers groups of scanned orders, they are stored in ECM for immediate desktop and Internet access. The system uses a database that was created by the DPW to enrich the indexes for retrieval purposes.

Office of the Clerk

The Office of the Clerk is responsible for over thirty services and listings. One of these thirty is to ensure that any business in the City is registered with the Office of the Clerk and that the registration is active since business certificates expire after four years. Several years ago the Office of the Clerk implemented a document imaging system to assist them in tracking expiration dates. The imaging system in place required them to scan the Business Certificates and manually data enter several fields from the "hand printed" forms. The system they used had several limitations preventing them to expand the system or connect with other databases to validate or backfill other index information.

ScerIS expanded the city's implementation of ECM to the Office of the Clerk. This solution was designed to transform the manually intensive processes to a more automated process to archive documents.

It started with a redesign of the PDF Business Application/Renewal Form. ScerIS transformed the PDF from a hand-fillable form to a fillable PDF to allow the applicant to type the necessary information into the form electronically. This allows for the use of a software application to recognize the typed information on the form as text and to automate the document indexing after it has been scanned. ScerIS also extracted the images and index information from the old imaging system and imported it into ECM.

The Office of the Clerk processes business certificates in a fraction of the time it took in the old system. The improvements across the department have also had a very positive effect on constituent services, allowing the department to respond immediately to inquiries.

"I am excited about the ScerIS scanning system and the impact it has made on the processing of the City of Boston Business Certificates."

- Suzanne S. Frederique, City Clerk's Office

Accounts Payable:
Audit Department, Boston Public Schools, Boston Public Library

Accounts Payable for the City of Boston spans every department. Three departments, including the Audit Department (Audit), Boston Public Schools (BPS), and the Boston Public Library (BPL), take the responsibility for managing the processing of all Accounts Payable Invoices into the PeopleSoft Financial System.

Invoices may be received by the processing department or by the requesting department and are vouchered by the processing department in preparation for payment. The vouchering includes the entering of line item detail for PO invoices, as well as, summary-level information for non-PO invoices.

Each invoice requires an approval or multiple approvals for payment. In the past, all entries were made from the paper invoice voucher form that accompanied the invoice when it was sent to Audit, BPS or BPL by the department.

The new process employed by Audit, BPS, and BPL includes the automated acceptance of invoices through email and/or the scanning of paper invoices into ECM, followed by the vouchering of invoices from the images and the linking of the images to the PeopleSoft voucher record for seamless retrieval of invoices through the financial system.

Health Benefits Department

The Health Benefits Department manages the process of enrollment and changes to benefits for both current and retired employees of the city. Paperwork is abundant in this department due to the forms and supporting documentation. The department also had no centralized filing system in place making retrieval of past transaction documentation cumbersome for staff members.

The Heath Benefits Department is now using ECM to manage the documents that come into the department. Because of the high volume and how many staff members are involved with processing information, each departmental staff member has their own scanner attached to their computer. Both scanning and indexing into ECM takes place upon completion of a transaction. To assist in the document indexing, a connection to PeopleSoft was established to backfill document indexes. All of the users in the department have the ability to search and view these documents from their desktops.

"By scanning all of our benefits transactions, we are able to shred original documents, which saves a huge amount of storage space in our department but more importantly, it gives us access to an employee's benefits file at the click of a button. This transition has allowed us to save time and space and streamline our workflow."

- Kathleen Green, Director of Health Benefits

Landmark Commission

The Landmark Commission oversees 9 districts with more than 8,000 historic properties. These properties are all considered historic in nature. Each property address has a folder or folders containing documentation, plans, and photographs that date back to the 1960's. Landmark staff needs daily access to these folders so offsite storage is not an option and the department has run out of space for the storage of these folders.

The Landmark Commission has elected to have these folders scanned by a third-party. Upon delivery, the images are imported and indexed through an automated process and stored in ECM. The Landmark Commission now has desktop access to any of the folders that have been added to the ECM. Due to the volume of the conversion and complexity of imaging documents (the size of business cards to architectural sized drawings), the process of adding new property folders in an ongoing process.

Audit Department & Office of the City Clerk - Contracts Management

Both the Audit Department and the Office of the City Clerk are involved with the review of completed contracts. The Audit Department would file the original and a copy would be sent for the Office of the Clerk to review and file.

Now contracts that have been approved and completed are being stored in ECM. The Audit Department receives the completed contract package then scans and indexes in into ECM. The Office of the Clerk needs to be notified of all new contracts. Upon completion of the scanning and indexing, ECM sends daily email notifications to members of the Clerk's office to review. These notifications include links to the images for the Clerk's staff to review.

Registry Division

Two of the many responsibilities of the Registry Division are to manage the process of Marriage and Death Certificates. Once a calendar year has been completed, all of the documents pertaining to marriages and deaths for that year are sent out to be bound into volumes. After the documents are bound they are filed in the Registry Division. The only way for a member of the Registry to look at them is to pull the bound volume and page thru until they find what they are looking for. Because of the frequent access to these documents and with disaster recovery in their thoughts the Registry Division looked to ScerIS for online storage of these documents for immediate desktop access.

The Registry Division now scans and indexes these documents into ECM. When requests come into the department for these documents, the staff has instant desktop access to view these records which reduces each transaction time by minutes, increasing the overall efficiency of the Division.

Highlights of the ETCETERA® ECM Implementations at the City of Boston

Inspectional Services Department
- ScerIS performed an onsite conversion to digitize all paper permits
- The scanned permits now reside in ECM
- Permits can be viewed by the public thru the City's Website

Department of Public Works
- Thousands of large format plans, drawings, and orders have been scanned
- Documents can be accessed electronically in ECM
- Images can be viewed by the public thru the city's Website

Office of the Clerk
- New business certificates and renewal certificates are scanned daily
- OCR is used to assist with indexing
- Staff can retrieve certificates in ECM

Accounts Payable: Audit Department, Boston Public Schools, Boston Public Library
- A/P invoices are scanned and stored in ECM
- Staff uses the images for processing into PeopleSoft
- Approvers can view the images from PeopleSoft

Health Benefits Department
- Daily scanning of documents related to employee benefits into ECM
- Staff can access these electronic documents from their computers

Landmark Commission
- Outsourced document scanning and indexing
- Images load into ECM
- Images can be viewed by the public thru the city's Website

Contracts Management
- Audit scans new contracts into ECM
- Automated email notifications sent to the Office of the City Clerk for review
- Both departments have desktop access to these contracts

Registry Division
- Scanning of Marriage & Death Records into ECM
- Staff can access these electronic documents from their computers

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At ScerIS, information is alive!