

The City of Scottsdale Improves Information Flow with Open Text Document Management, eDOCS Edition

Industry

State and Local Government

Customer



Business Challenges

- Provide an efficient method for sharing documents across the organization
- Ensure suitable document security and reduce duplication of documents with version-control mechanisms
- Introduce a more efficient method of controlling the flow of work throughout the organization

Business Solution

- OpenText Document Management, eDOCS Edition

Business Benefits

- Users have one central repository for managing content lifecycle, including paper, electronic documents, and email
- Easier access to public documents and records allows staff to respond quicker to constituent information requests, improving overall efficiencies
- Secure search, retrieval, and back-up capabilities enable better management and access to electronic content, improving approval cycles and enhancing productivity
- Users can define and manage workflows throughout all stages of the content lifecycle

OpenText's eDOCS DM system provides the City with easy access to public documents and records, improving overall efficiencies

Located in the Sonoran Desert of the Phoenix metropolitan area, Scottsdale is a diverse city of about 240,000 people and is known across the United States for its arts, tourism, and quality of life.

In 2003, the City of Scottsdale set out to find a technology solution that would enable its staff to share documents and information across various departments. The City had a Kofax® Capture® imaging system; however, it had no version control or full-text document indexing ability. A document management (DM) system was being used in the attorney's office, but it had been chosen as a single departmental solution. After seeing the benefits of the imaging and DM systems, the departments collaborated with Information Systems and initiated a request for proposal for an enterprise-wide integrated solution.

The City evaluated several vendors, narrowing it down to three solutions. Many requirements were necessary in order to make the project successful because a city is not just one business—it is many businesses, each one having different requirements. Specifically, the City needed a secure and scalable enterprise solution that would integrate seamlessly with its Microsoft® Office platform and its imaging software. It was also necessary that the solution not only store emails and electronic documents but also AutoCAD® drawings for the Planning Department. In addition, the City wanted to find a solution that would enable users to control the flow of work throughout the organization.

After evaluating the final vendors, the City of Scottsdale chose OpenText and its strategic partner 5280 Solutions™, a company with extensive domain expertise in city and county government implementations, to deploy OpenText Document Management, eDOCS Edition. The integrated document management solution provides the City with one central repository for managing content lifecycle, including paper, electronic documents, and email. The secure search, retrieval, and back-up capabilities of eDOCS DM enable the City's staff to better manage and access electronic content, improving approval cycles and enhancing productivity.

Implementation strategy

Implementation began in the Clerk's Office and later moved to the attorney's office, where they had been using a DM system from another vendor. As with any new software implementation, the City of Scottsdale went through a period of adjustment, but users soon realized that the solution met their needs.

Scottsdale now has easier access to public documents and records from a system that enables the application of appropriate security controls on each document. Only those





designated to view and publish documents have access to them, and City staff is now able to respond quicker to constituent information requests, improving overall efficiencies. The City is also taking advantage of the workflow capabilities of the OpenText system for defining and managing workflows throughout all stages of the content lifecycle. Users are able to define, apply, and reuse business logic and processes, providing them with the ability to generate cohesive interactions among people, business systems, and content.

Additionally, eDOCS DM offers City staff multiple user interfaces to interact with the DM system, including Windows® Explorer, Microsoft Outlook®, and Web browser-based interfaces.

Experiencing a positive culture shift from one department to the next

5280 Solutions managed the initial software installation and provided consulting services, project plans, resources scheduling, and implementation for the first pilots at the City of Scottsdale.

“Scottsdale has taken it upon itself to really own and manage this system. The team worked side-by-side with us on the first couple of

implementations, so they could manage it going forward,” says Troy Klobberdanz, Vice President of 5280 Solutions. “The management and maintenance of the OpenText system is very user friendly and intuitive, so after the first two or three implementations, they were in the driver’s seat, and we are here when they need us.”

City staff and departments have kept to the overall vision for sharing with other departments, such as the Transportation Department and the Clerk’s Office, and that has helped in making the culture shift. The Planning Department is moving from an imaging-based system to the document management system; since other departments, like Transportation and Purchasing, are interested in deploying the solution as well, City staff need to define the requirements and then move to the eDOCS DM system. The Court is next in line to have the imaging component deployed and then it will adjust the work processes to take advantage of the DM searching and instant availability.

Growing support

Approximately 500 users are on the system, with many other departments interested in joining. The big vision is to provide a tool that will help each department provide better service to the City. Overall, the City has approximately five million pieces of content stored in the system. Specifically, the Clerk’s Office has stored city ordinances and resolutions, council minutes, and agenda since the City’s inception in 1951; the Planning Department stores final plans, Certificates of Occupancy, and photos; voice mails, correspondence, and law classifications are accessed in the Attorney’s Office; and documents associated with sales tax, licenses, and lien filings are stored in the Financial Services Department.

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