



CHARTER TOWNSHIP OF WATERFORD, MICHIGAN

ArcGIS and Cityworks Combine with OnBase for Single Interface Access

The Charter Township of Waterford, MI, is a 36 square-mile area about 35 miles northwest of Detroit. The third largest township in Michigan, the Waterford government serves a population of about 74,000 people. To better serve constituents, Waterford has implemented an enterprise content management (ECM) solution in departments across the township, including Community Planning and Development, Public Works and the District Court.

Waterford initially began a search for a document management system to complement the township's geographic information system (GIS). After looking at four different systems, Waterford chose Hyland Software's OnBase ECM suite with core capabilities in document imaging, electronic document management, workflow, COLD/ERM and records management. Impressed with OnBase's flexibility, scalability and user-friendly design, Waterford first implemented the ECM suite in 1997.

Waterford began with a mature ESRI ArcGIS system, and OnBase was the piece that enabled Waterford to connect features in the ESRI system to relevant documents such as work orders, invoices, field reports and drawings. "The next evolutionary step for government GIS systems is document storage," says Terry Biederman, director of Public Works. "Why continue to use GIS and CMMS [computer maintenance management system] as surrogate document management systems? Nearly everything in public works and community government is tied to geographic locations and the ultimate goal is for all personnel to use GIS and leverage the power of document management within the application. Our goal is for personnel to never leave the GIS environment, yet be able to retrieve spatial information, access documents and create work orders. Our OnBase application is an integral part of achieving that goal."

With a certified partnership with ESRI, OnBase is fully integrated with ArcGIS. OnBase runs behind the scenes for GIS users as documents can be retrieved with a single mouse-click

on a GIS map. A convenient toolbar also provides search, retrieval and archive options for OnBase documents that are related to map features. OnBase provides users with document management and other OnBase functionality, such as workflow, without leaving the GIS application, improving productivity and decreasing IT resources.

Still difficult, however, was linking documents to Waterford's Azteca Cityworks application. For each document, users had to input the path to the file into Cityworks. The task was not only tedious and time-consuming, it was also unreliable. If someone changed the location of a file or linked it to a local machine that went down or was temporarily not connected, the document was unavailable. To remedy this problem, Hyland developed the Integration with Azteca Cityworks and took input from customers such as Waterford on how to develop the new module and interface.

Now OnBase is not only integrated with ArcGIS, it is also integrated with Waterford's Azteca Cityworks application. OnBase associates work orders and service requests from Cityworks to content in OnBase, including documents linked in the GIS. By utilizing both integrations, Waterford can stay in ArcGIS and retrieve not only relevant OnBase content, but also work orders and service requests from Cityworks, creating a single interface for the three to work together.

The Department of Public Works has migrated more than 100,000 documents to the new system, and with hundreds of thousands more documents already in OnBase, Waterford has a comprehensive content management system. Biederman estimates that about half to three-quarters of Waterford's 100,000 (and growing) work orders have at least one related document linked to it through OnBase, including field reports, invoices and sketches. With access to these documents, Public Works has significantly improved document access and productivity.

AT A GLANCE

The Charter Township of Waterford in southeastern Michigan has created an enterprise-wide document solution with a content management system that connects departments and allows them to share content and processes more easily. This investment was maximized in the Public Works Department, which increased productivity by integrating GIS and maintenance management data with other types of content and documents in a single interface.

BENEFITS

- Improves productivity by linking content in ArcGIS™ to OnBase and Cityworks® content
- Decreases IT administration with a single ECM system across the township
- Allows authorized users in multiple departments to share content in a central electronic repository
- Increases constituent service with quick answers to inquiries
- Automatic audit trails increase transparency and improve service

APPLICATIONS

- Building/Engineering
- Clerk's Office
- Community Planning and Development
- District Court
- Information Systems
- Parks and Recreation
- Police Department
- Public Works
- Purchasing
- Supervisor's Office
- Treasurer's Office

COMPLEMENTARY PRODUCT INTEGRATIONS

- ESRI ArcGIS Desktop
- Azteca Systems, Inc. Cityworks

Interdepartmental Solution Creates Joined-up Government Solution

Public Works, however, is only one of many departments utilizing OnBase. Because OnBase is deployed with minimal costs and resources, Waterford is able to expand the solution out to other departments as resources and time allow. Benefiting directly from the Public Works solution, Community Planning and Development (CPD) and Building/Engineering now have access to necessary documents in OnBase, creating a joined-up government solution. If CPD needs to see a blueprint or Building needs to see a site plan, both can immediately retrieve the document in OnBase.

If a constituent comes to the counter in the CPD department looking for information or to file a code enforcement complaint, the employee can immediately bring up the information in OnBase and cross-reference it to related documents with just a double-click of the mouse. To launch a code enforcement complaint, CPD utilizes OnBase's workflow functionality. The complaint is delivered to users across the CPD and other departments to determine what action to take. For example, Workflow sends the complaint to the Building Department to inform them of the possible violation.

The workflow also produces an inspection form and, in the case of a violation, helps to route the form through the decision-making process by delivering it to the correct users. With ad-hoc tasks and automatic timers to remind users of incomplete or waiting work, the human touch is kept in the process and bottlenecks are eliminated to make the solution as smooth as possible.

Should a constituent call to inquire about the status of a violation, the employee can pull up the complaint in OnBase and tell the constituent where it is in the process. Because OnBase has an automatic audit trail and document history, the employee can also

let the constituent know the complaint's history. Previously, the information was kept on various spreadsheets, which were inefficient and kept no record of the process. With OnBase, Waterford CPD has increased transparency as well as improved constituent service despite operating with a smaller staff.

Expanding Solution Provides Additional Value

In addition to the Public Works solution, the Waterford justice system also has an interdepartmental government solution. The 51st District Court and the Waterford

Police detective bureau have access to the OnBase system, unifying document access. For example, the courthouse is responsible for scanning traffic documents into OnBase, but the Police Department often needs to see them as well. Now that they are in OnBase, authorized users in both locations can access them.

On the reverse side, the Police Department is responsible to keep records of documents such as incident reports and gun permits, and the courthouse can now

view them as needed. Furthermore, the Detective Department also needs access to this information to conduct investigations and other tasks. Formerly relying on paper to get this content, detectives can now get needed information from their desks, saving time spent searching, retrieving and re-filing documents.

Security at both the courthouse and Police Department is significantly improved because multiple copies of reports are no longer on desks across the department and only those with authorization are able to see that the documents even exist. Thus, Waterford can be much more certain that confidential content is not seen by any unauthorized people. Automatic audit trails, which track who has viewed documents, when and if any changes were made, further allow Waterford to monitor that only those that need documents are viewing them.

Across the township, various departments that are responsible for maintaining the legal minutes from numerous township board and commission meetings use the OnBase Document Import Processor and Virtual Print Driver to store the minutes within OnBase. OnBase then uses optical character recognition (OCR) to full-text index the documents, which are then searchable by any word or phrase within the document. As a result, it is possible to quickly pinpoint discussions on a specific topic.

Waterford's solution continues to grow and evolve. In the future, the library will soon go live with OnBase, and Public Works plans to further integrate OnBase, ArcGIS and various other applications to make a single interface for all of the Public Works applications. "We are always looking for better ways to collect and expedite the dissemination of information," says Biederman. "We have already made huge productivity gains and dramatically improved interdepartmental communication, but we continue to explore and discover new capabilities in OnBase that will help us improve service in the township."

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-Terry Biederman
Director of Public Works



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