



Satisfaction Guaranteed: BPM and the City

A long term Global 360 customer, the City of Vancouver Community Services Group (CSG) decided to upgrade their storage and retrieval infrastructure to deploy a web-enabled business process management (BPM) solution for Permitting. The Domino (**D**ocument **M**anagement **I**nformation **O**nline) Enhancements Project goals were to upgrade the DOMINO storage and retrieval system, replace thick client applications with web-enabled applications; and migrate to magnetic storage. The City Manager summed up the deployment: “Enhanced Domino is recognized by the corporate management team as a City success story.”

With *Enhanced Domino* in full production, Vancouver successfully transformed their document storage and retrieval system into an enterprise-wide, BPM-enabled Case Management solution that supports the permitting process throughout the city, achieving the following key benefits.

Key Features	Key Benefits
Document Storage	Reduce operating costs and optimize system performance by leveraging storage platform choices: magnetic, database or optical disk.
Data Management	Increase performance and scalability and lower costs by consolidating data from disparate sources into the database and by reducing the amount of stored data.
Consolidated Administration	Implement the web-based applications for easy access to all administrative functions.
Document Capture	Realize expedited document capture with the new scan subsystem that supports color and web-based document import functions.
Web Services	Expand application platform support and insure smooth system integration by leveraging standard Web Services.

The Business Baseline

CSG is responsible for permits, inspections, by-law administration and by-law enforcement. Over 300 City employees used Domino but few enhancements had been implemented since the initial rollout. CSG users knew BPM had the functionality they needed to address their expanded business requirements for a unified desktop, multiple input channels and web-based case management.

Inputs and Work Distribution

Domino input was limited to scanned single document folders so fax, e-mail and desktop documents were printed and scanned back into the system. From information on the document, the Indexer forwarded the folder to the recipient's in-basket, which often contained several folders for the same address.

Permitting, inspections and enforcement are dynamic processes where relevant information is received verbally as well as through forms, citizen correspondence and inspection photographs. Domino provided online document access and was a partial solution to CSG information collection requirements but more was needed. Requirements included a single unified desktop application, support for color photographs, additional index attributes, and the ability to use case folders to organize work.

Web Applications & Web Services

With the upgrade, all user interaction with the system including Indexing is web-enabled. Web applications are easy to deploy and provide a framework for future expansion to hand-held mobile devices that could potentially deliver significant value to inspectors in the field providing immediate access to pending permits and inspection reports.

Web Services provide a common development environment consistent with the City's strategy. Custom web services provide access to applications such as Address Verification, Records Classification and Retention, Microsoft Active Directory user lists and Word import and indexing.

System Migration & Training Plan

The migration plan required a number of upfront technical design decisions as well as hardware and software staging. PBT was responsible for installation and testing of the new component software and the system upgrade, migration and conversion activities. The Domino production system was upgraded and all new development was done on a new instance of BPM which allowed PBT to quickly prototype, test and industrialize the applications.

Team Domino worked with PBT on a daily basis during development. Confident that Enhanced Domino would exceed user expectations, they chose *Train the Trainer* participants for their influence within the user community, a decision that made the trainers an invaluable asset during rollout. User feedback was very good and the atmosphere prior to rollout was positive. Training sessions pointed out CSG procedures that required clarification; gave *Team Domino* excellent feedback on the optimal approach for end-user training; and resulted in suggestions on how to modify the User Guide to facilitate learning.

Domino	Enhanced Domino
Inputs	
<ul style="list-style-type: none"> ▪ Scanned single document folders 	<ul style="list-style-type: none"> ▪ Scanned multi-document folders ▪ Indexed Word/Excel document import ▪ Indexed Web form import ▪ Fax-in
Applications	
Indexing <ul style="list-style-type: none"> ▪ Limited permit-based address look-up ▪ No record retention scheme ▪ Permit attributes only Processing <ul style="list-style-type: none"> ▪ Check-out and Mark-up ▪ Notes applied via mark-ups ▪ PRISM address notes in a separate app Retrieval Only	Indexing <ul style="list-style-type: none"> ▪ Comprehensive permit-based address look-up ▪ Auto-assigned records retention classification ▪ Inspection and enforcement attributes Integrated Case Management <ul style="list-style-type: none"> ▪ E-mail notification of pending work ▪ Referral for your action (FYA) and for your information (FYI) ▪ Document notes database ▪ PRISM address notes integration
Outputs	
Print <ul style="list-style-type: none"> ▪ A document ▪ A page 	Print or Fax <ul style="list-style-type: none"> ▪ A document ▪ A page ▪ A case folder

Work Notification

FYA (*For Your Action*) is a daily email that notifies the recipient of the number of cases, read and unread, in their Domino Worklist. It provides a hyperlink to the Domino Processing application. **FYI** (*For Your Information*) is a one-time email with a hyperlink to the View Only application for each document where the recipient is designated FYI.

Records Classification & Retention (RCR)

RCR is an application that maintains documents in compliance (i.e. retention and destruction) with legislation governing Electronic Document Management Systems. Classification ID, an index attribute automatically assigned to a document based on the doc type selected by the indexer, drives RCR application processing. Users can retrieve documents by classification ID.

Case Management

Enhanced Domino provides a unified desktop from which to manage, review and cases, conduct research, add and review document and address level notes, and view address specific documents in predefined business Categories. Case management includes the ability to add documents to an open Case, create a new case, route a Case to one or more FYA or FYI recipients, diary a Case to yourself or someone else, inactivate a Case, and complete a Case. Regardless of the action taken on a Case, the documents it contains are **always** available in the library. The case folder is simply a temporary wrapper (like a manila folder) that presents a collection of documents, and their associated notes, as a single entity.

The Benefits

The Manager of By-Law Administration stated: *The Global 360 BPM solution has completely transformed the way we work. We calculated that we're saving about \$400,000 a year just as a result of eliminating the time spent by staff retrieving paper documents.*

Productivity Improvements:

- New fax, e-mail and web-in input methods
- Multi-document folders streamline indexing
- Permit # Look-up reduces data entry
- Standard business categories drastically reduce research effort

Work Management Improvements:

- Ad-hoc routing adds flexibility
- Daily notification of cases pending
- Automated Diary function to facilitate follow-up
- Case folder creation and manipulation eliminates redundant searches

Information Management Improvements:

- Additional attributes reduce the need to open documents
- Document notes database provides a consolidated view of document-related information
- Archive prior to case folder creation insures access and safeguards documents
- Combined PRISM and Domino address notes deliver comprehensive address information

About PBT

PBT can help you meet your productivity goals, improve your competitive position, and provide better customer service by automating time-consuming tasks and providing you with BPM-enabled solutions second to none. Our experienced business professionals deliver skilled project management, award winning process redesign, creative workflow solutions and ergonomically satisfying user applications.

Our customer commitment:

- Your anticipated return on investment is always achieved and frequently exceeded.
- Your business goals are reflected in our solution templates.
- Your self-sufficiency is our deployment goal.

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