City Boosts Information Access, Productivity, with Document Management Software

Customer Profile

The City of Sherwood, Oregon, located 20 miles southwest of Portland, is one of the fastest-growing cities in the state. Its population has increased fivefold in 16 years.

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"We benefit tremendously from Document Locator, every day. Our people gain the confidence that the documents they need are actually in the system and available to them."

Laurie Peterson, Business Systems Analyst, City of Sherwood, Oregon

The City of Sherwood had a "typical" information storage system, which meant that it was almost impossible for one person to find documents stored by someone else. In response, the city adopted the Document Locator solution from Microsoft® Gold Certified Partner ColumbiaSoft. Now, people can find information even when they know almost nothing about the documents they're seeking— and the anticipated productivity gain is one hour per user per week.

Business Needs

The City of Sherwood, Oregon, had what Laurie Peterson, Business Systems Analyst, calls "a normal technology environment for most businesses." That was its problem.

That "normal" environment had 70 employees—40 administrative personnel and 30 in the Police and Public Works Departments—storing documents on a shared network drive. Each person could make as many folders as he or she needed.

Some documents—such as those for the Police and Human Resources Departments— were stored on secure locations.

"It was anarchy," says Peterson. "It was a nightmare. People couldn't find documents that they hadn't created themselves, or it was taking much too long for them to do so. I'd hear the lengths to which people would go to find documents and think, 'If that's what they're talking about, what are the examples they aren't talking about?' "

Document Locator®

Microsoft®

Like most governments, the City of Sherwood was subject to strict requirements about what documents it needed to keep and for how long. As a result, the number of documents in storage grew quickly. For example, by June 2005, Sherwood's Building department had almost 100 boxes containing more than 13,000 paper documents and building plans dating back 30 years. Because the new city hall that was under construction allotted limited space to document storage, administrators had to find a more efficient way to store these documents. Complicating matters, departments throughout the government were requesting more, not less, space for document storage.

The city needed a more efficient way to store documents. "We needed a flexible, cost-effective, and highly usable way to store documents online," says Peterson. "Because we didn't want to go through the process of identifying and adopting a solution again a few years later, we needed a solution that was highly scalable and full featured, to accommodate our changing needs over time."

Solution

The City of Sherwood conducted what Peterson describes as an extensive search for that solution. On the basis of features, price, and scalability, it chose Document Locator from ColumbiaSoft, a Microsoft® Gold Certified Partner based in Portland, Oregon. Document Locator is a document management solution for capturing, managing, sharing, and securing documents. The solution spans the document life cycle, from electronic origination or scanning, through collaboration, workflow management, and document sharing, to version control, auditing, document retrieval, and storage.

Instead of requiring City of Sherwood employees to learn a new document management interface, Document Locator works from menus within Windows® Explorer and the Microsoft Office system programs with which employees are already familiar. A toolbar integrated into Windows Explorer enables users to search for documents. Also, employees can right-click a document name to access the Document Locator features available for that document.

The solution utilizes Microsoft SQL Server™ 2005 relational database software, which was easy for the city to adopt since it was already using SQL Server 2000. The city hosts the solution on a dual-processor HP ProLiant DL380 computer. Because the solution stores both documents and metadata about those documents in SQL Server, it offers greater system reliability and simpler backup and recovery, compared to solutions that store document metadata in SQL Server but store the documents themselves in another application. Document Locator functionality is provided through SQL Server stored procedures. SQL Server indexing supports rapid search and retrieval.

Peterson and her colleagues conducted a pilot of the Document Locator solution in the summer of 2005 and then deployed it after moving into the new city hall in 2006. Within two months, three city departments had adopted the solution. Soon after, most of the rest of city government had started to adopt it as well. At least 11,000 of the 13,000 stored documents for the Building Department have been scanned into Document Locator, and the city is in the process of storing new documents in the solution.

Benefits

Peterson says that with Document Locator, she and her colleagues "can find the information we need even when we have virtually no information about what we're looking for. Using the Document Locator interface, you can easily view and sort search results. You can put your mouse over the results to bring up pop-up windows with all the metadata, to help identify the right document quickly. It's remarkable. We don't need to know much about how, when, or where the document was created and stored. We don't even have to know what sort of document it is—e-mail, word processing, presentation, or spreadsheet. We just look for the information we need, and Document Locator finds it."

For example, when the city planning commission revisited an issue that it had taken up some time before, one of the members recalled that language on the subject had been drafted during the earlier discussion. But no one could recall when that had been, what the document was called, or where it was. A search for a paper copy was unsuccessful. Without Document Locator, the next step would have been a lengthy, probably unsuccessful search of the archives. Instead, the document was found instantly, thanks to Document Locator.

"We benefit tremendously from Document Locator, every day," says Peterson. "Our people gain the confidence that the documents they need are actually in the system and available to them."

Peterson estimates that once all the files on the network have been imported into Document Locator and the old network server is no longer available, each user will save an average of at least an hour per week using Document Locator. Hard copies are now being added to physical storage when it is required by state law. And Peterson says that because the solution is supported by SQL Server, it has the scalability to meet the City of Sherwood's needs for years to come.

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