

Ephesoft Transact

City Council Achieves Document Security, Efficiency and Streamlined Workflow



- Customer: Bristol City Council
- Industry: Public Service
- Partners: Zaizi and Alfresco

Bristol City Council competency centre has implemented an electronic document records management system that utilizes intelligent document capture to automatically classify, sort and extracts data from documents, utilizing an open source, open standards, enterprise-grade document management solution that works on premise and in the cloud.

The Situation

Bristol City Council needs to ensure that front-line public services are delivered efficiently and that it continuously improves citizen access to services. Achieving these objectives depends in part on the Council's ability to combine the right services with partner agencies.

One of the IT department's initiatives is to identify team challenges within the Council and to help make everyone more productive. Analysis of the Council's service provision highlighted information management issues that impeded the delivery of improved, more accessible and more efficient services. To successfully rationalize and remodel its services, Bristol City Council needed to align its information sharing protocols and facilitate improved data exchange, removing or redesigning silo-based information systems and delivering council-wide data access to information.



Solution

One group, the Private Housing team, offers a service where landlords can electronically submit their complex property licensing forms. While many would submit electronically, a portion preferred to use paper. Ephesoft Transact was used to capture the documents and Alfresco was used as a “Building Block” to consolidate and share this information.

The Council now digitizes all paper forms, supporting documents and evidence received. The Ephesoft system extracts the required metadata, then routes and places necessary documents in the correct location within an Alfresco repository. In addition to license-form processing, it is also used to store agendas, minutes and supporting documents for meetings. Staff can now find the papers themselves – there’s no need to email documents. The solution worked great, yet unfortunately only twenty people used it.

The IT department knew that they still had huge volumes of archived and new documents to manage for other departments and realized that the council could do much more with the Ephesoft/Alfresco solution. Another group, the Bristol Workplace Programme, presented an ideal opportunity to expand the document classification, data extraction, and business process automation solution. This department needed a process for large data volumes for a variety project groups. There were many teams and setting up a solution for each of them was not practical. They realized that Ephesoft Transact was ideal to meet this challenge.

The Council was already using an outsourced scanning service, but they were paying them to do the metadata extraction; it was not practical to use them for larger document volumes. By employing Ephesoft, they could add standard header sheets to capture metadata; the software was trained to recognize header sheets, split out files as needed and send files to an appropriate location in Alfresco.



This project helped minimize effort extracting case references and other identifiers and using mail merges to generate header sheets. Now the scanning company captures everything as they receive it, and transfers the data back securely. There's no longer a need for manual search and extraction of metadata, or manual file splitting. Now when the Council needs to set up a new team, it requires little more than to copy and change a previous configuration, amend a few standard details, and they are off capturing information into Alfresco in a very short time.



Recently a new challenge came along from their administrative group, which required complex document approval processes. They have a limited budget for any new initiatives. They set up an email monitoring solution that reads incoming emails and extracts the attached documents, generates the correct metadata and routes the documents directly into the correct Alfresco repository, all while naming the images based on metadata parameters. Managers can quickly view files within the workflow approval processes; they also have easy access to information and efficient interaction with these documents.

Benefits

Since implementation, Bristol City Council has scanned nearly a million pages for ten different teams. They are ready to replicate this scanning and archival solution over other departments within the City Council.

Realized benefits include:

- Faster ability to digitize large volumes of archived paper.
- A reduction in the number of physical paper records stored; this also reduces office and storage space required for filing cabinets.
- Improvements in speed and cost of retrieving documents when needed.
- There's now a clear audit trail of requests, including comments from managers, attached to documents. This alone dramatically increased approval turnover, reducing cycle time from two weeks to the same day in many cases.

Future

Technology is only part of the solution; the IT team at Bristol are continuing to work with business teams to help them get the most of their Ephesoft and Alfresco investment. Through staff training, problem awareness and an understanding of how the technology can help in their daily work. New requests from other teams are always coming in, and now they are much easier to implement. The project team is also thinking about new cases where files are still manually transported. One major initiative will be to move legacy data and storage – with a migration from older systems into Alfresco with the use of Ephesoft to classify, extract and identify content from these inefficient, outdated repositories.

“As we learned more about the functionality of Ephesoft we have realized that it could be used to improve the efficiency of many other document-centric processes across the council. A good example is our spending approval processes. The product wasn’t originally deployed for these types of projects, but by thinking differently and expanding the number of use cases we’re helping to maximize the value we can leverage from the tool.”

- Robin Lewis, EDRM Domain Manager - Bristol City Council



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