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Case Study - City of Laguna Beach

New Open System Replaces Old Proprietary Document Imaging System – Yielding Time, Money and Environmental Savings

Business: City Government

Application: Document imaging system and file conversion for the City Clerk's Department

Customer Profile:

The City of Laguna Beach, located in Orange County, Southern California, is well-known as a unique beach community and artists' colony. Its 9.1 square miles has seven miles of beaches, and the community, home to 24,589 residents, welcomes some three million visitors each year. It is an affluent community with an active, inquiring, and environmentally concerned citizenry. It is the responsibility of the City Clerk's office to respond to those inquiries and to make copies of documents available not only to external requests, but also to other departments within the City. The City Clerk's department has records that go back to the 1920s consisting of documents such as ordinances, resolutions, City Council meeting minutes, agendas, contracts, other official records, and campaign financial statements.

Business Issues:

The City of Laguna Beach was facing a not uncommon problem. Some eight years ago, the Community Development (Planning) Department had invested in a FileNet Watermark document imaging system.   The City Clerk's office also used the system to scan and archive all the City Clerk's documents, and over the course of time some hundreds of thousands of documents had been placed on the system. Several years ago, the Watermark system was discontinued by FileNet. The Community Development Department moved to FileNet's Panagon, which involved an annual maintenance agreement, but the City Clerk's office had sever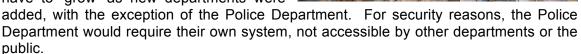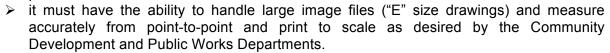al thousands of documents stored under the Watermark proprietary system which were, or were rapidly, becoming, inaccessible.
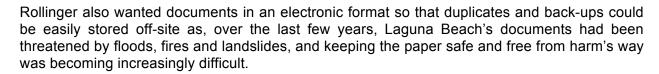
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Verna Rollinger, Laguna Beach's City Clerk with some 30 years experience, realized that the City had to do more than just replace the old Watermark system. The new system would have to meet specific criteria:

- ➢ it could not be proprietary like the earlier document imaging systems and all images and metadata must be easily accessible in the future and not require any expensive conversion process should new systems emerge that would require any exporting or importing.
- ➢ it must be easily searchable by all users regardless of technical expertise.
- ➢ it would replace four different imaging systems used by four different departments within City Hall. This meant that it would have to 'grow' as new departments were added, with the exception of the Police Department. For security reasons, the Police Department would require their own system, not accessible by other departments or the public.
- ➢ it must have the ability to handle large image files ("E" size drawings) and measure accurately from point-to-point and print to scale as desired by the Community Development and Public Works Departments.
- ➢ it must be able to make documents available to the public via the web.

Rollinger also wanted documents in an electronic format so that duplicates and back-ups could be easily stored off-site as, over the last few years, Laguna Beach's documents had been threatened by floods, fires and landslides, and keeping the paper safe and free from harm's way was becoming increasingly difficult.

The Solution

Bob Berghell of Island Technologies (www.IslandTechHI.com), an experienced imaging VAR and systems integrator from Newport Beach, CA, was initially contracted to perform a consulting study to determine the feasibility of converting the Watermark files into a standard format (TIFF Group 4) which could then be put into an imaging system of the City's choice.

Island Technologies was able to perform a successful conversion of the Watermark documents utilizing Onstream Systems' WMExtract software utility (which was designed to seamlessly extract all images, metadata, folder information and annotations from the Watermark server).

Island Technologies also recommended that Onstream Systems' Trapeze document imaging software be implemented

to replace the Watermark system. All of the Watermark data was successfully converted and imported into Trapeze Vault. Trapeze Vault is a completely open system with transparent architecture, using standard image file formats and a SQL server database that is easily accessible.

A high-speed scan station has been installed in the City Clerks office, with a high capacity server running Windows 2000 and SQL Server 2000. The system has a large storage capacity to handle the imaging needs of the City Clerk's and several other departments within the City. During 2004, the City Clerk will scan and import upwards of two million images onto the Trapeze system, with the goal of having all City Clerk documents on the system by year-end.

Each department will have at least one computer able to access the records, and users in more than 10 departments will be searching and retrieving City Clerk documents. The search speeds are remarkably quick, even with hundreds of thousands of images in the system. Users may now search by document type, department, date, address, notes or other fields and sort by any field desired.   "Some departments require frequent access to City Clerk's records, others less so", explained Verna Rollinger, "but the time savings are remarkable. People no longer walk from other departments to our offices to request documents – and we no longer have to walk to our paper vault to search boxes for the relevant papers, copy them and then retrace our steps to return them– they just need to use a couple of clicks of the mouse to access what they need on Trapeze Vault. It has also made preparation for City meetings easier and less costly as my department no longer has to prepare document packets for each member. With the final phase when we use Webstreamer to make the documents available over the Web, we will also eliminate the need for many of our citizens to drive to City Hall to obtain documents".

Rollinger noted "To fully appreciate all that Trapeze could do for my department, I needed to see it operating with MY documents".

Several other departments (Public Works, Police and Community Development) will implement their own scanning solutions using Trapeze Capture to add their documents to the Trapeze Vault database.

Berghell commented, "Although not a large city either in terms of number of residents or square miles of area, Laguna Beach is probably, through its level of affluence and the number of visitors it accommodates each year, comparable to cities five or ten times its size. The beauty of the Onstream Trapeze

system is that one can build it incrementally, from a stand-alone system to a multi-hundred seat client server. For local government, Trapeze is uniquely suitable because of its ability to scan, store, and retrieve large scale documents (such as E size drawings) remarkably quickly. It also allows for measurements, both linear and square, and for annotation so that these documents can be more easily passed between departments than in their paper format. Electronically these large cumbersome documents lose the disadvantages of paper, yet maintain its advantages and familiarity."

The City of Laguna Beach is on-track to secure its documents at an environmentally friendly cost.