

# Case Study

## City of Jacksonville

**Located in northeast Florida, Jacksonville is the largest city in the contiguous United States in terms of land area, and 14th largest in population. It is a major port, the insurance and financial center of the state, site of U.S. Navy bases and host of the National Football League's Super Bowl XXXIX.**

This fast-growing metropolitan area is served by 7,000 municipal employees and a city government committed to fiscal responsibility and customer service. Nowhere is that commitment more evident than in the City of Jacksonville's Information Technology Division, which is charged with ensuring all municipal departments have the technology required to operate efficiently and cost-effectively.

In 2004, the IT Division identified business process management and enterprise content management as two technologies to meet these important goals. In 2005, the City of Jacksonville engaged Paperless Office Solutions, Inc., who introduced and helped integrate and roll out Cardiff LiquidOffice and Xerox DocuShare to automate workflow, accelerate processes and effectively manage important government information from an electronic library.

The results to date have been extraordinary.

### The Challenge

The extent of the City of Jacksonville's paper-pushing challenges became apparent in 2004. As new CIO Dave Lauer and Manager of Technology Strategy and Communications Jim Katz toured municipal offices, they saw rows and rows of filing cabinets in virtually every division and department in the 7,000-employee municipality.

"We were using a ton of paper forms," says Katz. "A lot of these processes require multiple hand-offs and approvals. They are being carried out with a form that someone needs to sign, put in an envelope, and send via inter-office mail to the next department.



There, an administrative assistant opens it, decides what to do with it, and ultimately puts it in an executive's stack of things to do. Eventually, the executive reviews, approves, or rejects the document, and puts it in the outgoing stack for the assistant to move forward, and so on."

Katz says forms spent the bulk of their time in transit or awaiting review and approval by the appropriate manager. Critical government processes as well as a number of routine procedures faced unnecessary delays.

In addition, metropolitan Jacksonville is an area that experienced effects from four hurricanes in the span of a few months in 2004, raising concerns at the highest levels of city government about the vulnerability of paper documents in the event of a natural disaster.

As a result, reducing the municipality's reliance on manual, paper-based processes as well as improving the storage and retrieval of electronic information became top IT priorities for the City of Jacksonville.

### The Solution

In 2005, the City of Jacksonville installed Cardiff LiquidOffice, a powerful Web-based solution for creating, deploying and automatically managing business processes, and Xerox DocuShare, a best-of-breed enterprise content management system that embeds Cardiff LiquidOffice's advanced search technology, coincidentally.

"The synthesis between Xerox DocuShare and Cardiff LiquidOffice is tremendous,"

#### Customer at a Glance

**City of Jacksonville**

**Industry:** Municipal Government

**Application:** Travel and reporting process

**Challenge:** With 7,000 municipal employees and a mandate for fiscal responsibility, reduce the reliance on manual, paper-based processes and improve the storage and retrieval of electronic information.

**Solution:** Cardiff LiquidOffice

**Results:** Powering the city's travel approval and reporting process with Cardiff LiquidOffice and Xerox DocuShare has resulted in faster turnaround, higher employee productivity and greater control and transparency.

"Previously, it took a minimum of six weeks to get an employee travel request through the City of Jacksonville's approval process. With our automated electronic workflow solution, powered by Cardiff LiquidOffice, it can be done the same day."

—Jim Katz, City of Jacksonville

Katz says. "Together, these technologies give the City of Jacksonville the ability to automate workflow, accelerate processes and effectively manage important government information from an electronic library."

Katz expects this combination of technologies to power possibly hundreds of applications across the City of Jacksonville over the next few years including processes for building inspections, accounting, HR leave, procurement and travel. The municipality's travel approval and reporting process was the first to benefit from LiquidOffice and DocuShare.

"We essentially mirrored and automated the travel process, as it is done now," Katz says. "With some significant help from Cardiff, we converted the hard-copy forms we use today into electronic forms and mapped out the workflow with all of the requisite stops along the way."

The new and improved travel approval and reporting process enables:

- The electronic submission of all travel request and expense claims via LiquidOffice.
- The logical progression of forms through a review and approval cycle that includes managers, department heads, officials in Accounting and Treasury, and ultimately the Director of Administration and Finance.
- The electronic capture of receipts. Travel-related invoices can be attached to expense claims to simplify reporting and auditing.
- An automatic reminder if a decision isn't made within a specified time period.
- Special approval requirements if a travel request exceeds specific dollar amounts, or if a number of civic employees request travel to the same event.
- Easy archiving and retrieval of completed travel requests, expense claims and related documents in DocuShare.

The early success of the travel approval and reporting process has been widely praised at the highest levels of city government. Katz says the best is yet to come. "We have probably hundreds of potential opportuni-

ties to leverage our investment in the Cardiff LiquidOffice across the City of Jacksonville," he says. "As more department leaders start to see the benefits of workflow automation, the demand will be significant."

### Benefits of Cardiff

The City of Jacksonville is enjoying several benefits since automating its travel and approval and reporting workflow. Turnaround time is lower. Productivity of key personnel is higher. And the process is significantly more transparent for auditing purposes.

"Previously, it took a minimum of six weeks to get an employee travel request through the City of Jacksonville's approval process," Katz says. "With our automated electronic workflow solution, powered by LiquidOffice, it can be done the same day."

The automation means that employees who travel on municipal business every year avoid wasting valuable time handling, authorizing, and pushing paper forms through the travel request and expense claims process. LiquidOffice dramatically reduces what was previously a 20-minute interruption at each of the 11 review/approval workflow stops. For the senior managers, appointees and other key City of Jacksonville personnel who travel regularly, this is time that can be used for more strategic purposes.

The City of Jacksonville also benefits from tighter control and greater transparency of its travel approval and reporting process. With LiquidOffice, the municipality ensures that travel requests go through the proper approval procedures. And LiquidOffice's integration with DocuShare ensures every travel request and expense claim is readily accessible for auditors or review by city leaders. "The ability to take our completed travel forms and related documentation and archive them in the DocuShare library is a tremendous asset," says Katz.

### About our VAR

#### Paperless Office Solutions

PaperLess Office Solutions, Inc., a value-added Cardiff reseller based in St. Augustine, Fla., delivered true knowledge transfer to the City of Jacksonville's Information Technology Division. PaperLess Office provided expertise on developing the first automated workflows and optimizing the Cardiff LiquidOffice and Xerox DocuShare technologies.

"The Cardiff and Xerox software were a powerful combination for Jacksonville," says Tony Deakins, Paperless Office Solutions' president and chief technology officer. "This implementation is a case book example of a city moving its processes from the hard copy and paper-heavy world into the digital age."

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