

# Case Study

## City of Boston

### New England's largest city uses Cardiff TeleForm and LiquidOffice to automate internal and external business processes.

Boston, the largest city in New England with 600,000 residents, is on the cutting edge of technology. Today, in every Boston Public Library, children receive free Internet access with future plans to build a new "technology high school" to prepare its kids for careers as engineers, programmers and technicians. Thomas M. Menino, Mayor of Boston, creatively addresses the needs and challenges that the city faces, including efficient management of resources, budget and internal business processes.

#### The Challenge

As a government entity with 19,000 employees across 43 departments, the City of Boston manages thousands of internal and external manual processes daily. In order to increase efficiency, the city seeks to bring all of the city's corporate forms online and to automate the mission-critical business processes they drive.

#### The Solution

After thoroughly analyzing solutions that would bridge the gap between paper and digital processes, Craig Burlingame, Chief Information Officer at the City of Boston selected Cardiff® TeleForm® to begin the migration. With this solution, the City of Boston can quickly and easily capture and convert paper-based and electronic forms into digital data in order to significantly improve its internal processes and provide efficient, timely service to its citizens.

Taking advantage of its existing infrastructure, the City of Boston uses TeleForm with scanners and fax machines to enable data to be captured efficiently and directly from paper documents, instead of being input manually. For example, Boston constituents can process an "Electrical Permit Application" to request electrical work permits. This form is currently published in a PDF format on the Intranet Server where



it is made available to walk-in customers on four different CITRIX terminals. The City of Boston constituents fill in the forms and submit them to the Inspectional Services Department (ISD) where the data is processed and sent to a database for approval. Once the form is approved, it is printed and an official copy goes to the constituent and another goes to the ISD inspector for performing an inspection on the completed building. This form can be filled out online or by hand and forwarded for further processing and approval. Once complete, the form is scanned into the system and the form image is forwarded with its indexes to an InfoTrieve document management system for archive.

The Boston Centers for Youth & Families is also using TeleForm to manage several community learning center forms to help improve data collection for the 'After School Programs'. Student Enrollment and Partnership Information Forms are filled out by hand then faxed via the RightFax Server or scanned into the TeleForm system where the form data is extracted to a database. The student's data is retrieved with AutoMerge Publisher (AMP) to create weekly attendance forms for the students enrolled in various programs at 30 different sites of the community learning centers. Reports and analysis are conducted on the data from these forms for federal/state reporting. After successfully solving the paper equation, the City of Boston increased its business processing capabilities by adding Cardiff® LiquidOffice™. LiquidOffice is a "paperless" system that

#### Customer at a Glance

##### City of Boston

**Industry:** Government

**Application:** Internal- and external-facing government forms

**Challenge:** Automating all business process across the entire City of Boston organization

**Solution:** Cardiff TeleForm, Cardiff LiquidOffice, PeopleSoft HRMS

##### Results:

- Reduce data entry costs for its 19,000 employees across 43 city departments
- Streamlined internal operational processes
- Accelerated delivery of data and documents to backend systems
- Reduced data errors using business rules processing

“For most of the routine processes, the processing time has been cut from weeks to days and days to hours.”

—Craig Burlingame, City of Boston

enables organizations to design, deploy and automatically manage the routing, tracking and approval processes of forms and documents. LiquidOffice also adds automated data validation, attachments and workflow capabilities to public- and citizen-facing HTML and PDF forms. These capabilities allow the City of Boston to support intelligent routing, tracking and secure digital approval, over the Internet, allowing for process to be handled completely online.

"We found the TeleForm designer so easy to use and so flexible that the logical next step for us was LiquidOffice," said Craig Burlingame, chief information officer for the City of Boston. "It was a natural extension of our processes and made a complimentary companion product to meet our goals of automating all our manual processes."

By adding LiquidOffice, the city can pass data from TeleForm to LiquidOffice. TeleForm manages the paper-based processes, and LiquidOffice is used to automate the business processes of internal forms—such as purchase requisitions, leave requests, and monthly management reports—as well as external-facing electronic forms, such as city parking, building and electrical permits.

The Cardiff solution will enable the City of Boston to significantly reduce data entry costs for its 19,000 employees across 43 city departments through its ability to transfer data directly to and from their existing PeopleSoft® Human Resource Management suite (HRMS), Microsoft Access and Outlook solutions. The integration of the two systems will allow data from PeopleSoft HRMS to pre-populate forms with a user's profile information by employee ID number, providing the ability to validate users data within the global address list across the organization.

The leave and time-off forms are integrated with Microsoft Access and Outlook so that the members of the team have visibility to the schedule across the organization, providing the ability to see approved advanced leave available on the public calendar. This also provides for work queue capabilities for items not requiring an immediate response.

### The Benefits of Cardiff

The City of Boston realized significant benefits by migrating to the TeleForm and LiquidOffice solution, including streamlining internal operational processes; accelerating delivery of data and documents to backend systems; reducing administrative costs; and eliminating data errors with business rules processing.

"This implementation has greatly reduced the time we spend reviewing, searching for and tracking down the status of documents," Burlingame said. "The time it takes to submit, apply action and approve forms and documents has also significantly improved. For most of the routine processes, the processing time has been cut from weeks to days and days to hours."

Secure electronic transactions with the public have reduced costs and enabled fast, tailored responses. The Cardiff solution implemented at the City of Boston ensures that electronically submitted information and signatures are transferred in a way that protects the individual's confidentiality, another important consideration.

"Not every citizen has access to the Internet, nor is everyone ready to manage processes over the Web," Burlingame said. "What we like about Cardiff's solution is that it offers something for everyone, using a combination of methods via multiple mediums, whether it's the Web, email, or PDF."

#### Cardiff (USA)

3220 Executive Ridge  
Vista, CA 92081  
Tel: 760.936.4500  
Fax: 760.936.480

Email: [information@cardiff.com](mailto:information@cardiff.com)

#### Cardiff (UK)

Cambridge Business Park,  
Cowley Rd, Cambridge CB4 0WZ, UK  
Tel: +44 (0) 1223 448 000  
Fax: +44 (0) 1223 448 001

Email: [information@cardiff.com](mailto:information@cardiff.com)

#### Other Offices

Cardiff has additional offices in Boston, New York, Sunnyvale, Vista and Washington DC, as well as in Amsterdam, Beijing, Brussels, Hamburg, London, Madrid, Milan, Munich, Oslo, Paris, Rome, Shanghai, Singapore, Stockholm and Sydney and Taipei.



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