

Case Study

Trinity River Authority of Texas

The Trinity River Authority of Texas uses Cardiff LiquidOffice to save time and money by reducing paper processes within its HR department.

The Trinity River Authority of Texas (TRA) is an independent political subdivision of the State of Texas that provides water, wastewater, reservoir and recreation facilities within the Trinity River watershed. This 18,000 square mile watershed lies in the eastern third of the state, includes the rapidly growing Dallas/Fort Worth metropolitan area, and is home to over 30 percent of the state's population. The three primary functions assigned to TRA by the state legislature are to maintain a water resources master plan for the entire watershed; serve as local sponsor for federal water projects; and provide services authorized by the state legislature within its territory.

TRA has developed assets valued in excess of \$1 billion and exists without the benefit of a direct tax base or appropriations from the state or federal government. Tight fiscal management and control are necessary goals of the organization. With this in mind, TRA management launched cost-saving initiatives to reduce paper processes and procedures.

The Challenge

In response to this paperwork reduction mandate, General Services at TRA sought to streamline business processes. As the department responsible for payroll, human resources and personnel functions, many of its processes were inefficient due to a redundant flow of paper forms throughout the organization. These inefficiencies impacted employee morale and productivity and resulted in an inability to be fully competitive with private industry in recruiting and hiring high-caliber employees.



For example, supervisors had a choice between using a printed work performance evaluation form during the employee review process, which had to be completed on a typewriter, or using an Excel or Word form from a computer. The evaluation had to be accompanied by a separate personnel status change form, recommending the salary increase for the employee being reviewed. Each of these forms required up to four or five signatures and contained much of the same information, resulting in wasted time and paper.

“The process of getting signatures from managers was cumbersome,” said Taylor Huynh, Manager of Personnel Services at TRA. “Because our facilities are spread throughout our watershed, it often took several weeks to distribute the evaluations and complete the approval cycle. In addition, many supervisors were still using typewriters, so paper forms had to be transported between our different sites. We needed to make operations more efficient and to reduce our transportation and mailing costs.”

The Solution

After completing a productivity survey, General Services set out to find a solution to present to the TRA Board of Directors. They created workflow charts demonstrating the redundancies in the processes and contacted several other river authorities for ideas. The search led to Cardiff® LiquidOffice™ and a solution from Interlink

Customer at a Glance

Trinity River Authority of Texas

Industry: State/local government

Application: Centralized repository of personnel, HR and payroll eForms

Challenge: Reduce redundant processes & streamline approvals

Solution: Cardiff LiquidOffice, Interlink Electronics' ePad used with CIC's Sign-It Software for signature certificate authentication

Results:

- More efficient flow of information
- Reduced costs for printing, paper, transportation and mailing
- Shorter approval times, from weeks to days, for many processes
- Integration of personnel actions/ requests with payroll system

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—Taylor Huynh, Trinity River Authority

Electronics, a global leader in the design and manufacture of intuitive interface technologies and products.

"We were concerned with cost and ease of use," said Huynh. "We don't have in-house programmers, so we needed user-friendly software that would require minimal training. The fact that we could set up a central forms repository by ourselves with the Cardiff LiquidOffice solution was a huge factor in our decision. Its compatibility with other systems and with interface devices for obtaining electronic signatures was also important."

LiquidOffice's turnkey enterprise eForm repository supports all types of external forms and document file formats. Organizations are able to utilize the form repository from 'day one' by putting all blank corporate forms into a central location and phasing in forms with built-in intelligence.

"Though it took us three months to compile our proposal and gain approvals, it only took a matter of weeks to set up the eForm repository that replaced our outmoded paper processes," Huynh commented.

Many of TRA General Services' online forms have built-in intelligence that initiates processes as various actions are completed. For example, the employee evaluation and the personnel status change forms have been combined onto a single form that contains fields that are automatically filled in from data residing in the main HR database. Once completed, the form gets automatically routed to the first supervisor in line for signature and authentication, which is accomplished via Interlink Electronics' ePad tool and CIC's Sign-It Signature software. The approval process is completely automated with email alerts to the person whose signature is required.

The Benefits of Cardiff

Huynh points to a wide array of productivity and efficiency gains, as well as direct cost savings associated with the new processes.

"If a supervisor doesn't sign off on a form in a certain amount of time, the form can be withdrawn and sent to the next supervisor," Huynh explained. "We've removed the roadblocks in the process in addition to greatly reducing paper, printing, transportation and mailing costs."

Huynh continued: "We have reduced offset printing costs by eliminating carbon-copy and other paper forms, and we have reduced approval times from weeks or even months to days." In the future, TRA has plans to use LiquidOffice across other departments in order to eliminate workflow bottlenecks and redundant processes. "The open architecture of LiquidOffice is going to allow us to connect directly into our new Lawson financial system," said Huynh. "Because LiquidOffice is designed for business process automation using an open systems approach, the ability to connect to future systems is ensured."

Cardiff (USA)

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

Email: 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

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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