

FOUR HUNDRED *Stuff*

Hardware, Software & Services

REPRINTED FROM VOLUME 10, NUMBER 5 – February 2, 2010

Utilities Department Gains Workflow Efficiencies from S4i Systems

Time is money. And when business processes run slow, costs rise. Not just internal costs relating to lost productivity and inability to harness revenue streams, but costs associated with unsatisfactory customer service. Curtailing these business costs has a direct connection to increased profitability. You want an example? The city of Modesto, in Central California, with the help of software vendor S4i Systems, is phasing in document management changes that are simplifying data delivery and saving money.

Mike Bumanlag is one of the IT software analysts responsible for the utilities department's applications running on a rack-mounted IBM System i 520 Express machine with a 40-user license. In the fall of 2008, the 520 replaced an iSeries 820 and the operating system was upgraded from V5R3 to V5R4. In September 2009, the OS was upgraded to IBM i 6.1--a very easy process, Bumanlag says, by the way. The application load on the 520 includes the S4i Express document management system, the NaviLine suite from SunGard's Public Sector (formerly HTE) division, and WebSphere. Performance on the 520 is much better than on the 820, Bumanlag notes.

He describes the city's IT department as a mix of servers and development environments. "We have to do a lot of interfacing with a lot of different applications. We don't have one application that handles all the city's work," he says.

The circumstances in the utility department, prior to implementing electronic document management, are a familiar scenario of frustrations that many organizations encounter. In this case, approximately 80,000 customers depend on the utility for their water requirements. Historically, the city depended on a paper-based system for internal accounting, invoicing, work orders, and dozens of internal reports. Managing, routing, and storing these documents--which spanned multiple departments and physical locations--became a classic paper chase.

More than a few of our *Four Hundred Stuff* readers will, no doubt, recognize in this example their own circumstances loaded with frustrating deficiencies and populated with many co-workers and managers who accept the situation as "just the way things are."

We hear a lot about cost-cutting and streamlining procedures these days. The progress made in Modesto is a good example that can be applied to other instances. Try this on for size.

One of the first priorities at Modesto was to improve the capability to reference and duplicate utility bill history so that customer service representatives (CSRs) weren't spending countless hours attempting to uncover data related to past water usage and payments.

When this was a paper-based system, invoices were created from spool file data. No copy of the invoice was kept on file at the utility. Spool files containing the data that went into the invoices were saved on the AS/400, but they were not indexed and they were not an exact replica of the invoice, which wasn't the best of circumstances for the CSRs. Gathering data was too slow to be satisfactory and storing spool files on the system eventually created a performance drag.

So the idea to convert spool files to PDFs became step one. This is where S4i came into the picture. S4i Express was used for converting the spool files that contained various reports into PDFs.

As this step was taken, each spool file contained thousands of un-indexed invoices that still were not exact copies of the invoices that were sent out. So even with a PDF, the benefit to the customer service reps remained minimal. Determining an account history remained a labor-intensive and resource-draining stone wall, as frequent requests for historical information was more than just a nuisance. When searches required information from multiple months or multiple customers, the level of inconvenience--and more importantly the intensity of labor--was magnified.

"Customer searches could be done on the huge PDFs, but it took forever to chew through all the info," Bumanlag recalls. "Because nothing was indexed, the search looked at every word on every page."

"It was a very laborious process of searching for the correct spool file, the correct customer number, and then printing only the pages that pertained to the customer," says Susanne States, director of sales and client services at S4i.

One positive to this situation was the conversion of spool files to PDFs did allow that spool file information to be cleared from the AS/400 system, so that was progress.

The utilities department invoices were being printed and mailed by a third-party vendor and the situation took another step forward when a change was made in how the printer received the information that was used in the invoice. Rather than spool files, Bumanlag began sending data files that identified field names and the information in those fields. That streamlined the invoice set-up process and combined with another move to improve the workflow.

There was also a decision made that the printer would begin creating the PDFs after the invoices were completed. This allowed the PDFs to look just like the invoices and it corresponded with the implementation of S4i indexing capabilities, which gave the CSRs a huge advantage over the previous situation.

One PDF still has as many as 1,000 customers on it, but the S4i indexing and archiving functions have reduced researching time and effort considerably.

Because of the S4i Express browser-based functionality, CSRs began pulling information based on indexes that include customer names, account numbers, and invoice dates. For about a dozen service reps handling utility bills through an interactive voice response system, this was huge time saver.

S4i Express capabilities include the capabilities to capture, separate, index, bundle, deliver and archive documents and reports. Output formats include PDF, HTML, Excel, and Word documents.

Bumanlag has found other good uses for it at the utilities department. For instance, each night he prepares internal reports that go to the financial department. The finance guys never touch data on the System i. They're on another system. But Bumanlag uses S4i Express filters to provide all the needed information.

"Most everything anyone wants to look at in relation to a utility bill can be pulled into S4i Express by using filters," Bumanlag says. "Finance gets the data it needs and information can be brought from finance and shared with other internal sources using this two-way data exchange."

Until recently, time sheets for city workers were centrally printed and then manually distributed by supervisors to a variety of locations around Modesto. Using a forms program, then creating a PDF of those forms, and using the S4i Express Capture module allows time sheets for specific departments to be indexed and archived. This and the capability to electronically dispense the forms streamlined distribution by eliminating manual steps for supervisors. Bumanlag says 27 city departments that use almost 700 time sheets--a large portion of the city's employees--benefit from this efficiency.

"I can use the index feature of S4i and group the time sheets according to destination," he says. "I use the bursting capability of S4i. Then I automate the e-mail delivery process."

Bumanlag also converts a variety of spool files to PDFs and sends them in report form to users that require the information. "I am looking for reports for users, picking them up, and directing them to a printer and using e-mail to verify. In some cases only a PDF is necessary--no printing is required."

"The old way was for one person to print and hand-deliver a report," Bumanlag continues. "I am finding instances where I can simply e-mail a PDF of the report to the final destination and eliminate the printing and the hand-delivery steps."

Reports can be easily customized to the end users' requirements with information displayed according to user convenience, he says. You think anyone is missing those old hand-delivered spool files? And when the printers are quiet, that's the sound of money being saved.