



Digital Transformation for the City of Georgetown

Georgetown Utilities Records Management Project

SPEAKERS



Robyn Densmore
City of Georgetown,
Assistant City Secretary



Russell Haddock
MCCI,
Territory Leader

BACKGROUND



- Over 900 employees
- Over 20 Departments
- Georgetown Population 67,140
- Over 62,500 Utility Customers in a 70 square-mile service area



2018 AWARDS



**2018 MCCi
Excellence Award**

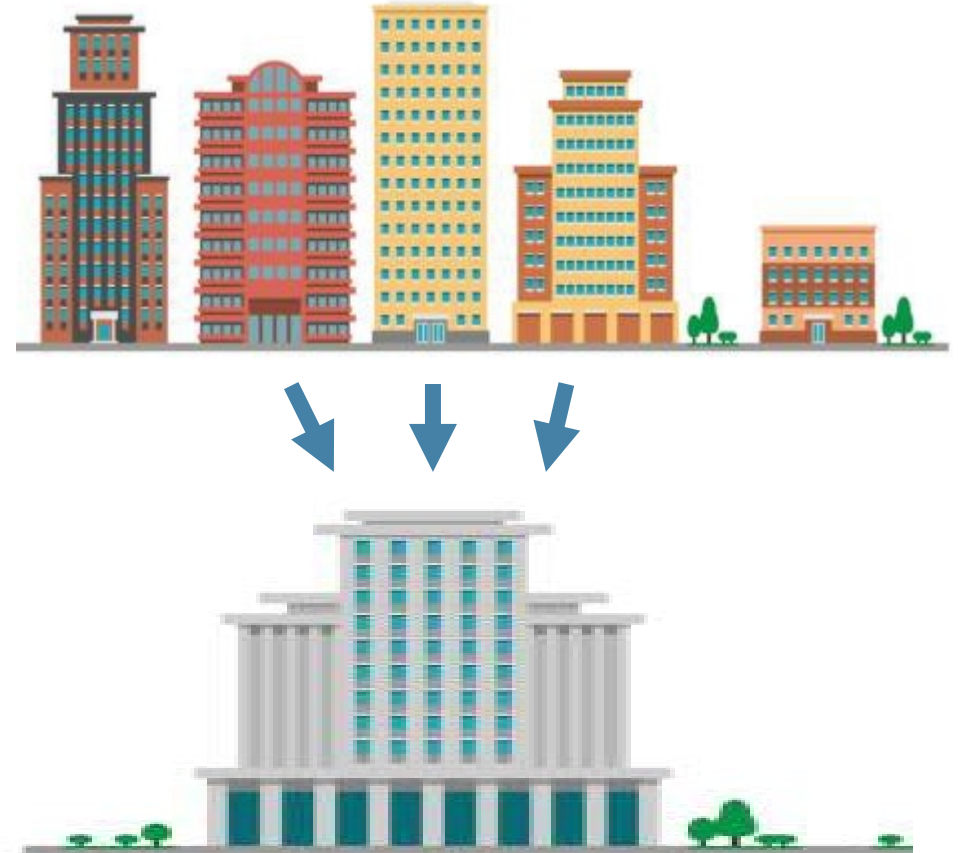


**2018 NAGARA Program
Excellence Award**

PROJECT SUMMARY

BIG WHY:

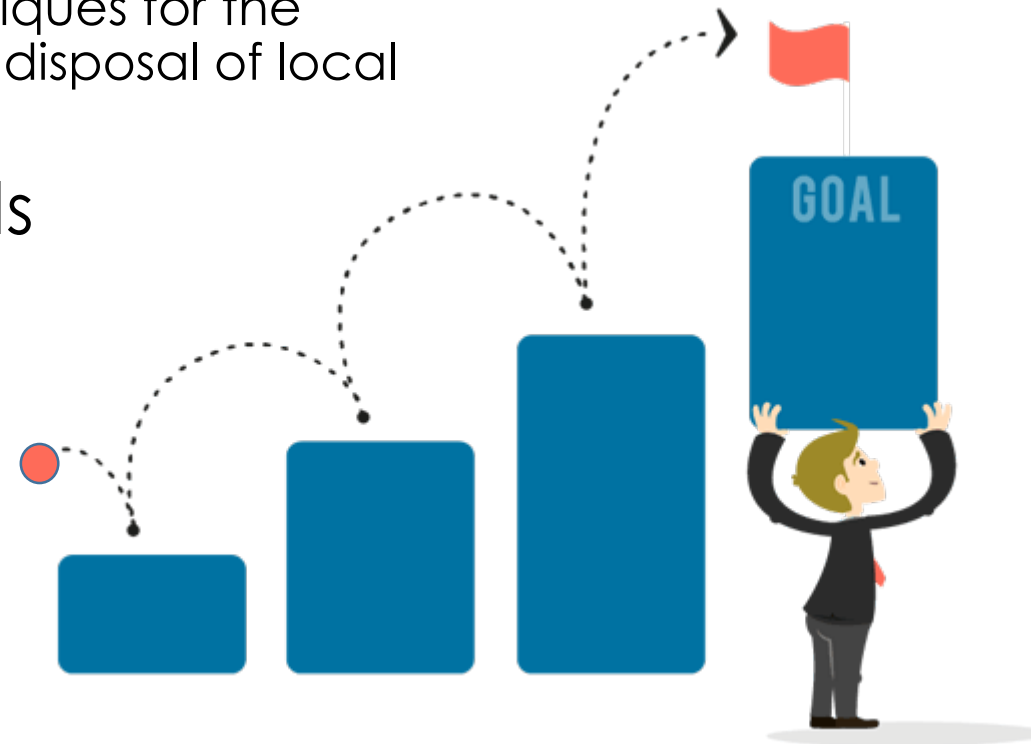
- Merger of Georgetown Utility Systems and a nearby Special Utility District
- Gained 10,000 utility customers
- Acquired thousands of records in the merger



PROJECT SUMMARY

BIG GOALS:

- Improve efficiency and reduce costs through
 - implementation of records management techniques for the use, maintenance, retention, preservation, and disposal of local government records
- Systematic control process of records throughout their life cycle
- Compliance with record information laws and regulations



PROJECT SUMMARY

BIG RESULTS:

- Records are now searchable and retrievable corresponding to our organization needs
- Accelerated the process of fulfilling the city's increasing number of Open Records Requests
- Produced a completed records inventory
- Ensured proper retention
- Identified records for destruction and disposition



PROJECT BREAKDOWN: SCOPING



PROJECT BREAKDOWN: PLANNING



Budget



Schedule



Project Team



PROJECT BREAKDOWN: EXECUTION



Project Phases

Inventory

Digitization

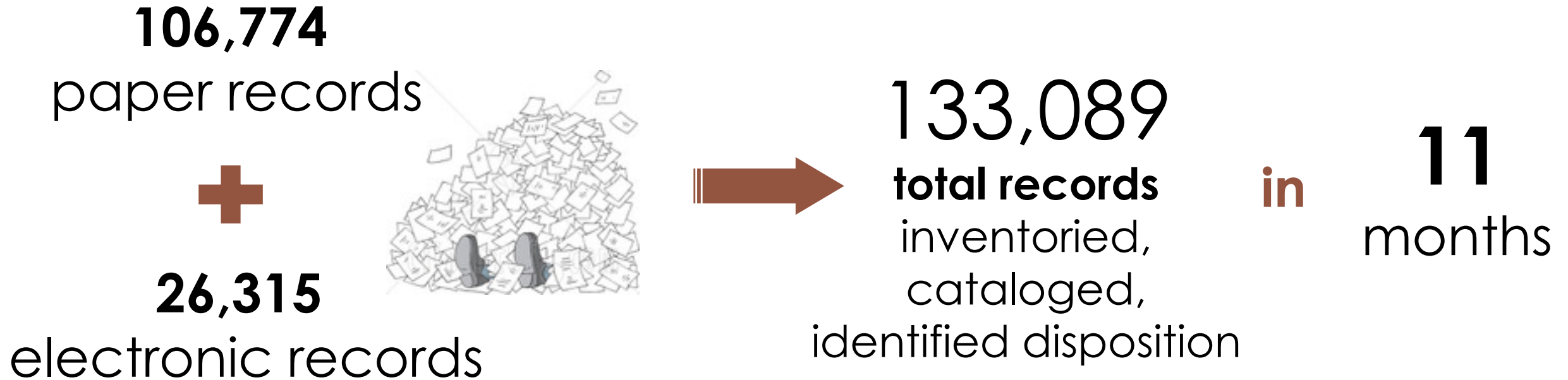
Destruction



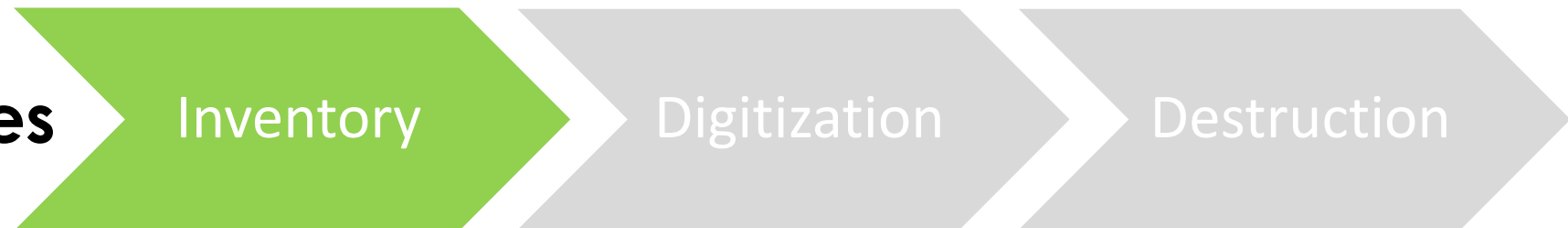
BEFORE



INVENTORY



Project Phases



DOCUMENT TYPES



Meter Reports

Correspondence

Board Packets

Construction Projects

As Builts

Easements

Service Orders

Customer Account Histories

Invoices

**Operations & Maintenance
Manuals**

Inspections

Contracts

AFTER



DIGITIZATION



Decreased
scanning
time by 91%



Saved
\$82,164.00 of
project budget



Changing the
standard
organization-wide

Project Phases

Inventory

Digitization

Destruction

DIGITIZATION



>300,000 pages scanned using **PaperStream Capture**

The Process

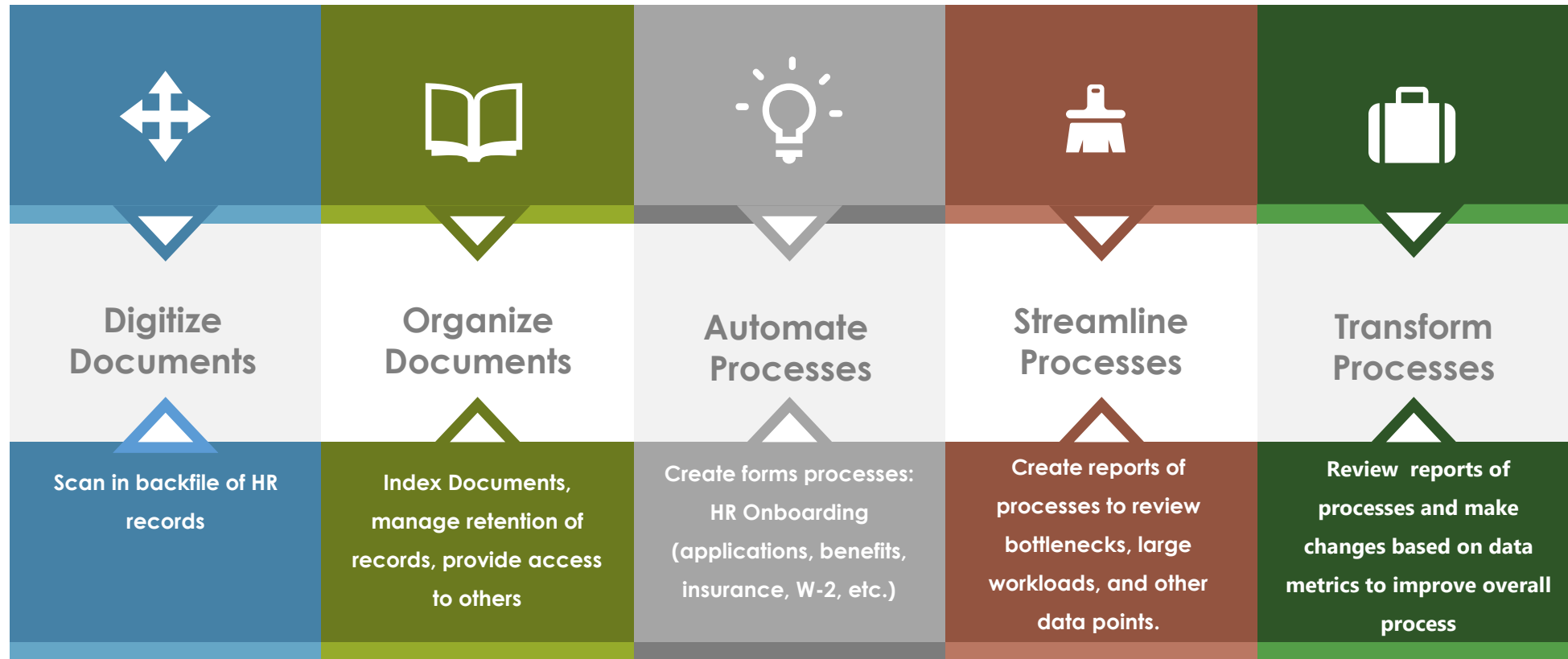
- Made document capture easier and faster with single button scanning and release options
- Seamless integration using TWAIN driver application
- Document type specific Laserfiche Quick Fields sessions were created to capture and extract metadata to auto-populate in templates
- Customized workflow ensured required metadata fields were appropriately completed
- Barcode double entry automated confirmation that reduced the overall metadata entry error to less than 2%

Project Phases



DIGITIZATION

Digital Transformation Model



Example: Human Resources Implementation

DIGITIZATION



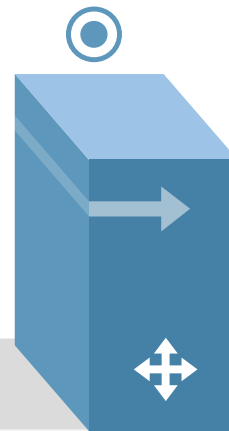
DIGITAL TRANSFORMATION

This model is a roadmap for transforming your office into a digital workplace. It provides a structured framework for content digitization, process automation, analytics, and more.

Phase 1

Digitize Documents

Create an electronic filing cabinet by converting your documents from paper to digital.



DIGITIZATION



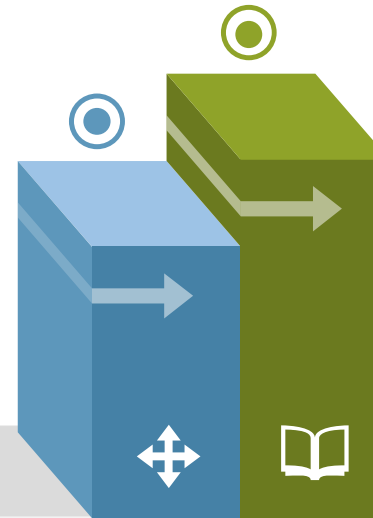
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Phase 2

Organize Documents

Easily categorize your documents and manage them in a secure, central location.



Digitize
Documents

DIGITIZATION



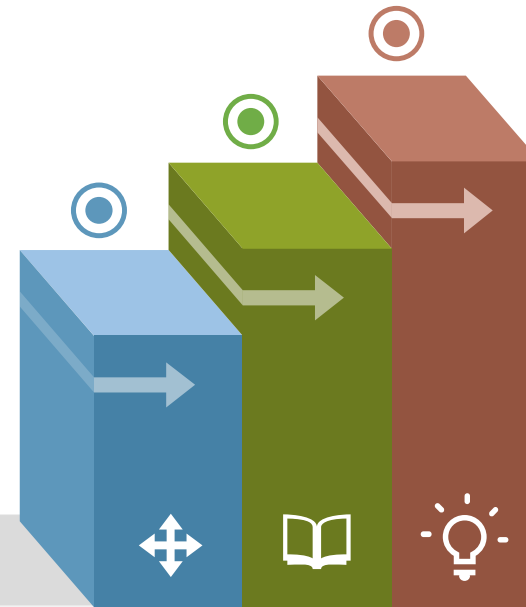
DIGITAL TRANSFORMATION

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Phase 3

Automate Processes

Improve accountability by digitizing your business processes with easy-to-use electronic forms.



Digitize
Document

Organize
Document

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DIGITIZATION



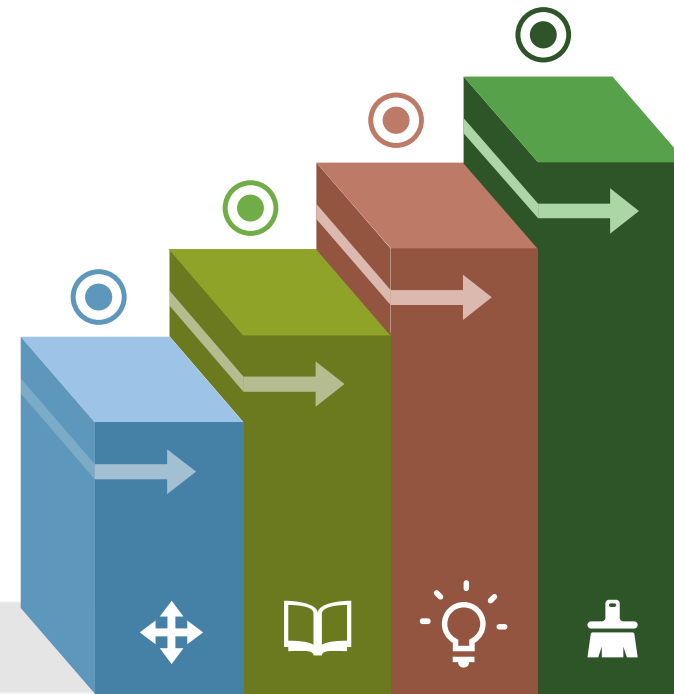
DIGITAL TRANSFORMATION

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Phase 4

Streamline Processes

Gain more visibility into your operations and increase the efficiency of cross-functional processes.



Digitize
Documents

Organize
Documents

Automate
Processes

DIGITIZATION



DIGITAL TRANSFORMATION

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Phase 5

Transform Processes

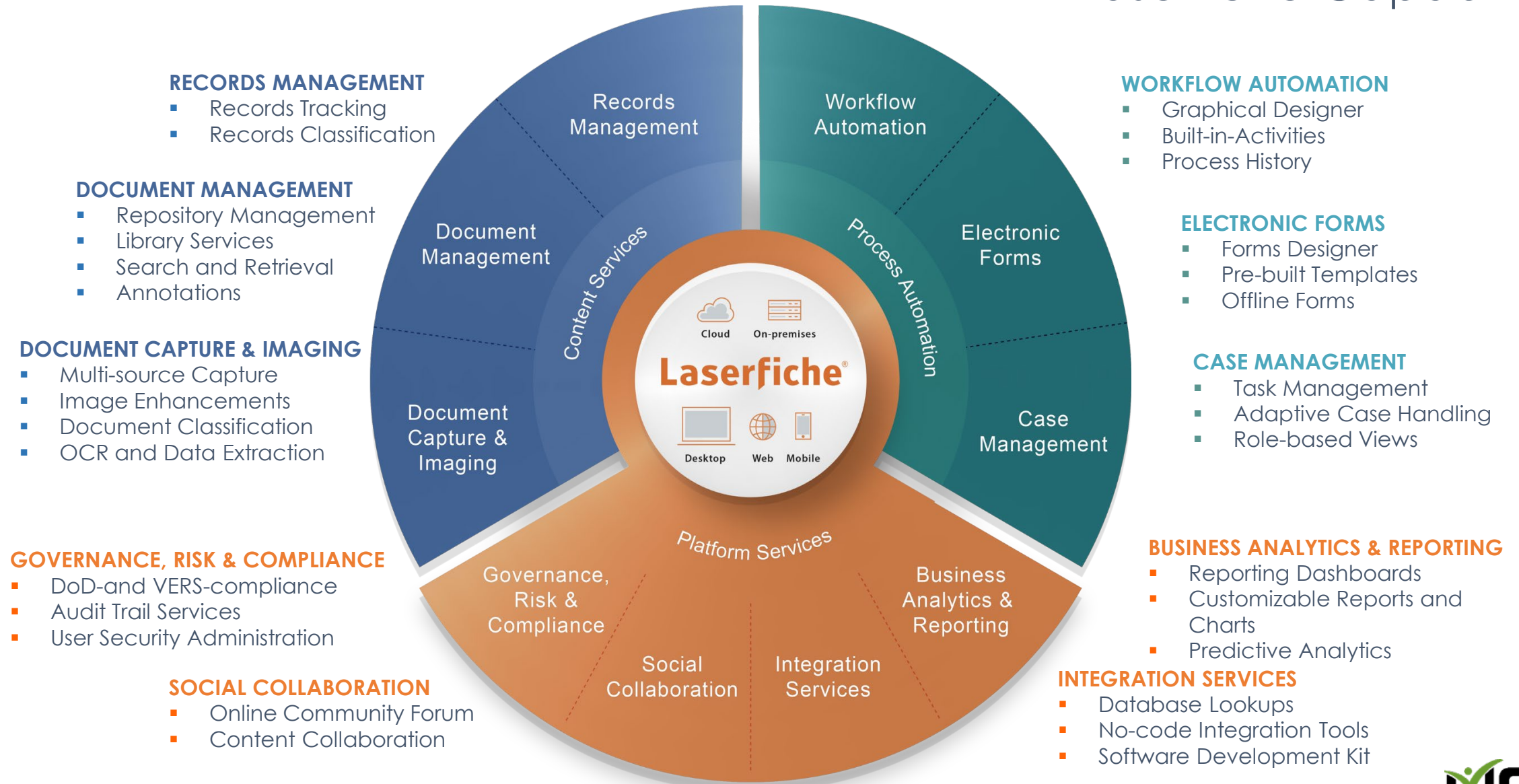
Drive innovation by leveraging predictive analytics and insight to transform processes.



Digitize Documents Organize Documents Automate Processes Streamline Processes Transform Processes

DIGITIZATION

Laserfiche Capabilities



DIGITIZATION

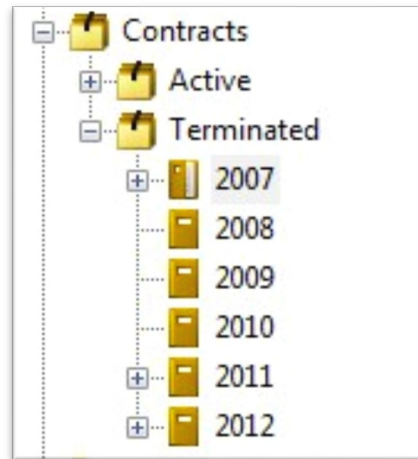
Electronic Records Management

Manage the life cycle and archival of records

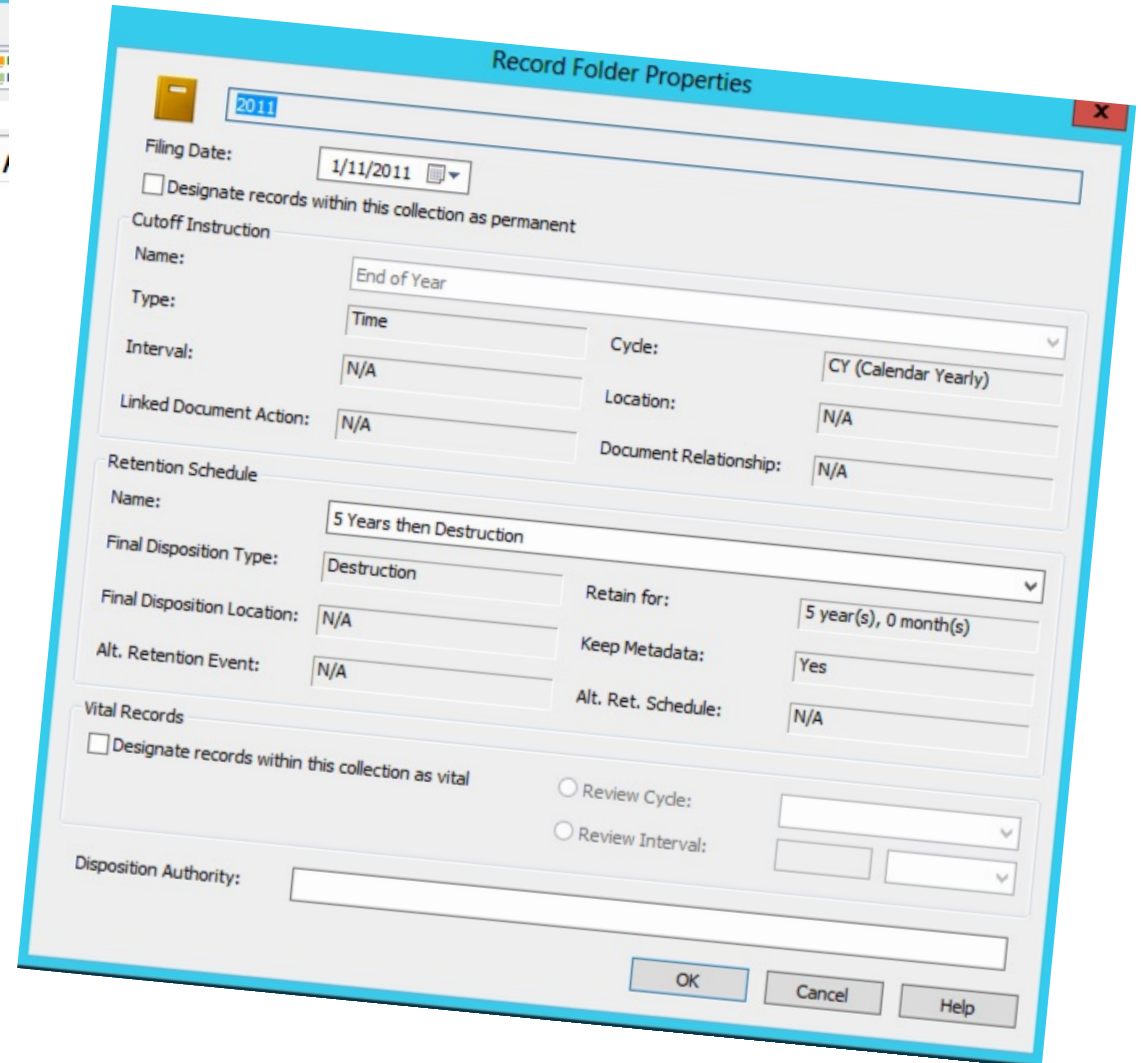
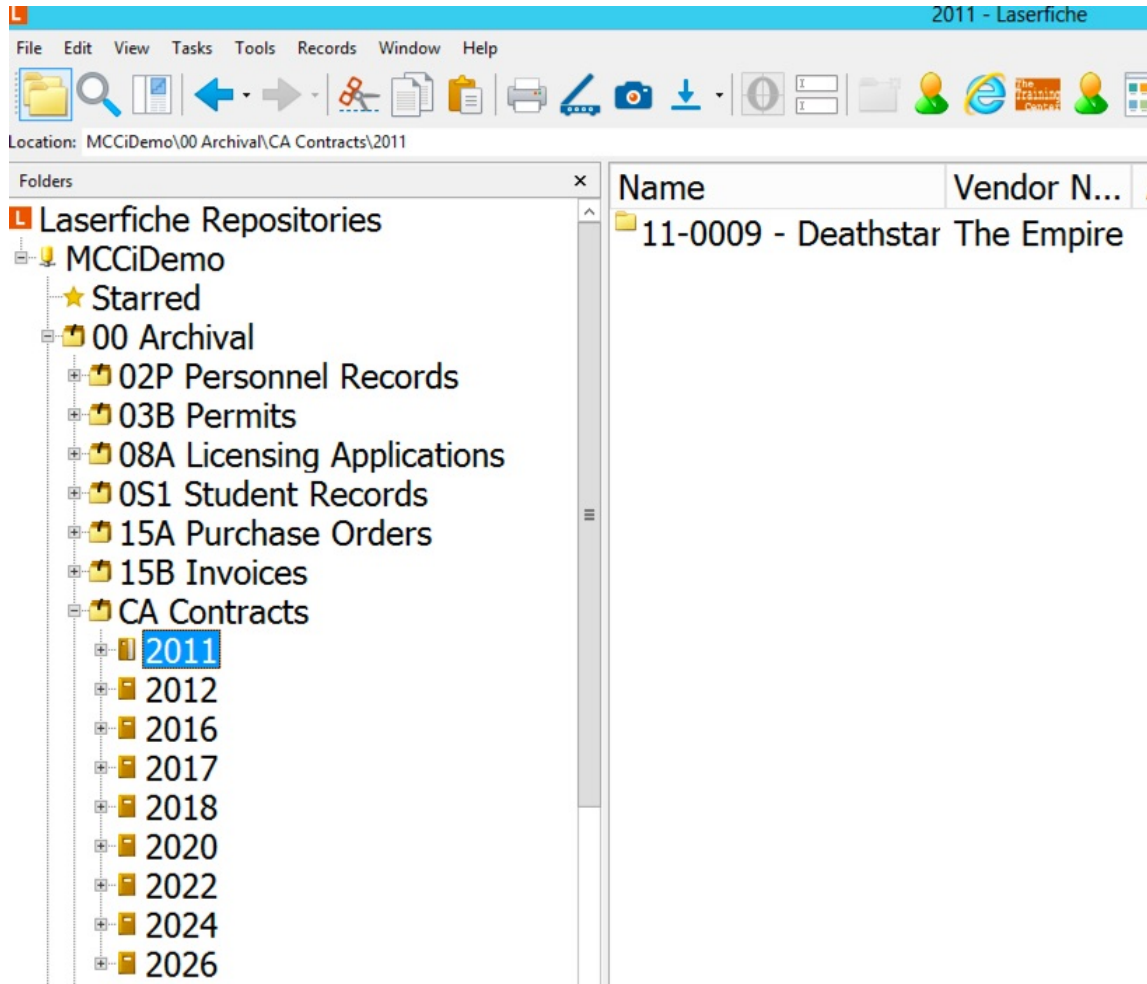
- DoD 5015.2 Certified Capabilities
- Disposition
- Transparent Records Management

Promote compliance with:

- Sarbanes-Oxley
- HIPAA
- CJIS
- USA PATRIOT Act
- SEC
- FINRA
- and other regulations



DIGITIZATION



DIGITIZATION

Death_Star_Owner's_Technical_Manual_blueprints - Laserfiche

File Edit View Tasks Annotations Tools Window Help

Image

Metadata

Fields Tags Links Versions: 2 Signatures

Template: Finance - Contracts

Contract Document Type
Contract

Contract Number
11-0009

Vendor Name
The Empire

CA - Department
Engineering

Executed Date
1/8/2000

Expiration Date
1/8/2011

Add/Remove Fields...

DEATH STAR
ELEVATION PLAN

- Main exhaust port
- Thermal exhaust port
- Secondary power converters
- Control power columns
- Tractor-beam reactor coupling
- Tractor-beam generator tower
- Emergency radiation discharge
- Main power generator
- Hypermatter reactor
- Concentric surface decks
- Ion sunlight engines
- Ion-dome reactor
- Atmosphere processing unit
- Water tanks
- Reactor bridge
- Superlaser power cell
- Primary power amplifier
- Firing field amplifier
- Induction hyperplane generator
- Targeting field generator
- Primary beam focusing magnet
- Carrier beam crystal
- Magnetic shielding
- Superlaser tributary beam shaft
- Hyperdrive
- Power cell
- Control computer core
- Sector computer cluster
- Heat exchanger
- Ionizer fuel loaders
- Cooling system
- Battery
- Fuel collector

EXTENSIVE

- Bandolier steel outer hull
- Polar trench
- Superlaser focus lens
- Equatorial trench
- Mid-hemisphere trench

Demonstration

MCCiDemo (MCCI\mcci) Page 1 of 1

DIGITIZATION

Records Management Actions

Name: MCCiDemo\00 Archival\CA Contracts\2011

Record folder status: Eligible for Destruction

Location: Current file area

Retention

Once a record folder is cutoff, it enters the disposition phase. Once it reaches its final disposition eligibility date, it can be accessioned or destroyed.
Note: If a record in the folder has record-specific processing information it may not enter disposition at the same time as the rest of the folder.

Cutoff Eligibility Date: 1/1/2012

Transfer Location: Projected Actual

Final Disposition Eligibility Date: 1/1/2017

Buttons: Close, Cutoff, Retention, Destroy, View Record Folder..., View Record Series..., Done, Help

Records Management Actions

Name: MCCiDemo\00 Archival\CA Contracts\2011

Record folder status: Eligible for Destruction

Location: Current file area

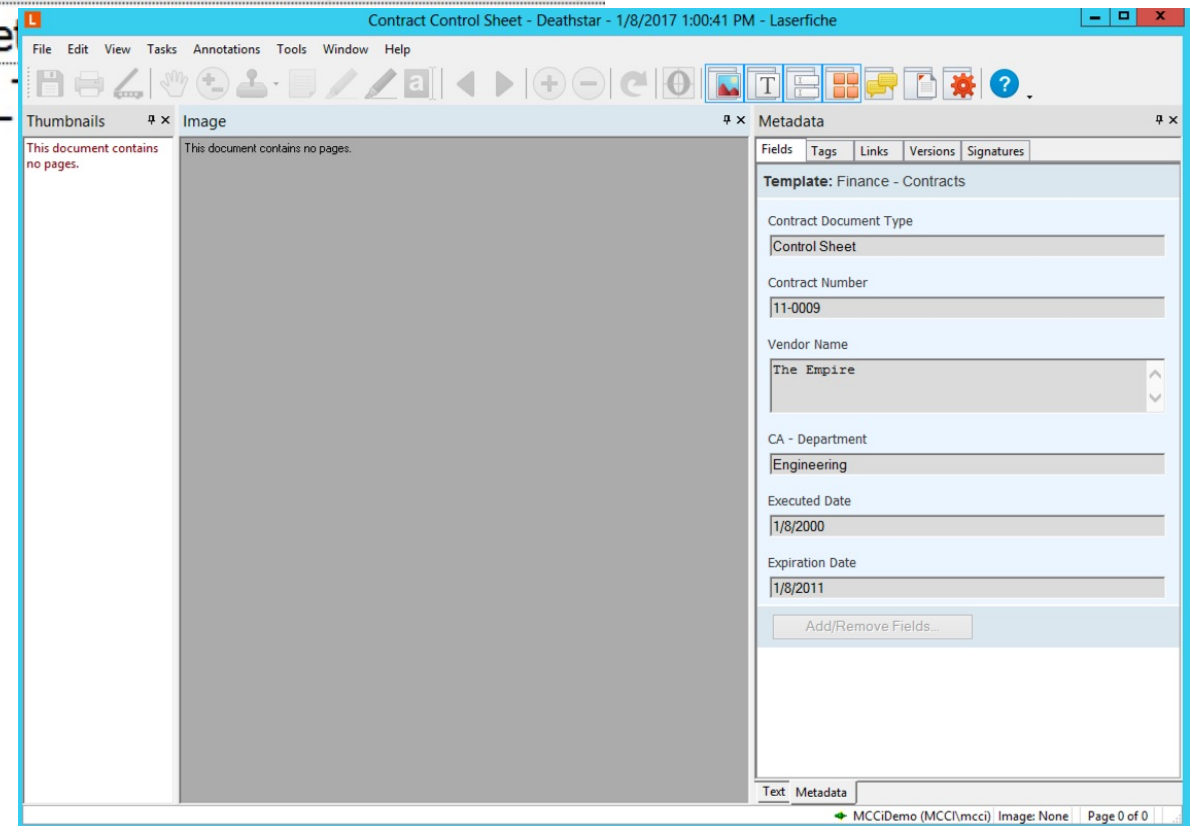
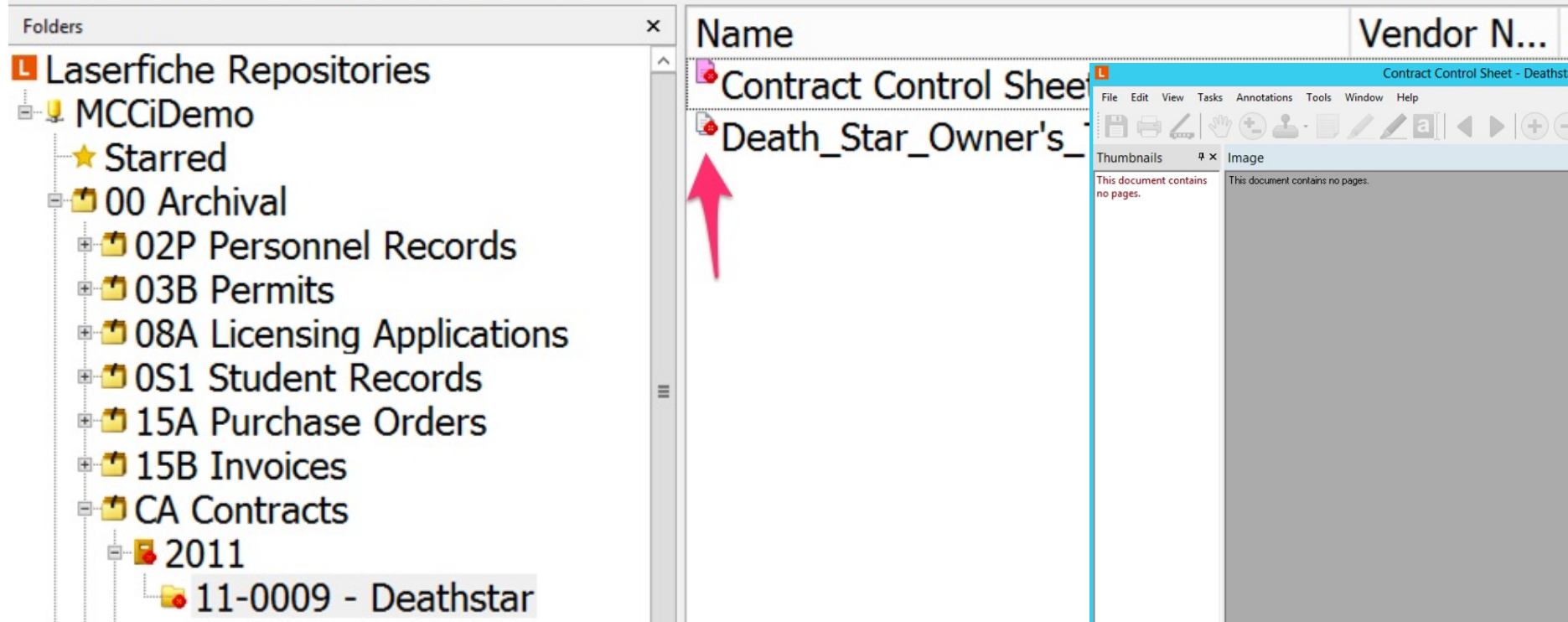
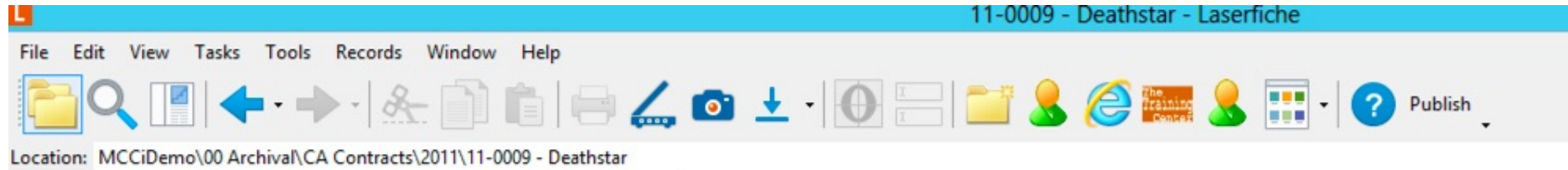
Destroy

The destroy command will dispose of all records in the folder that are eligible for destruction. The record folder itself will be destroyed when all the records contained within it are destroyed. If the Retain Metadata Information option has been selected, entries containing metadata will remain in the repository.

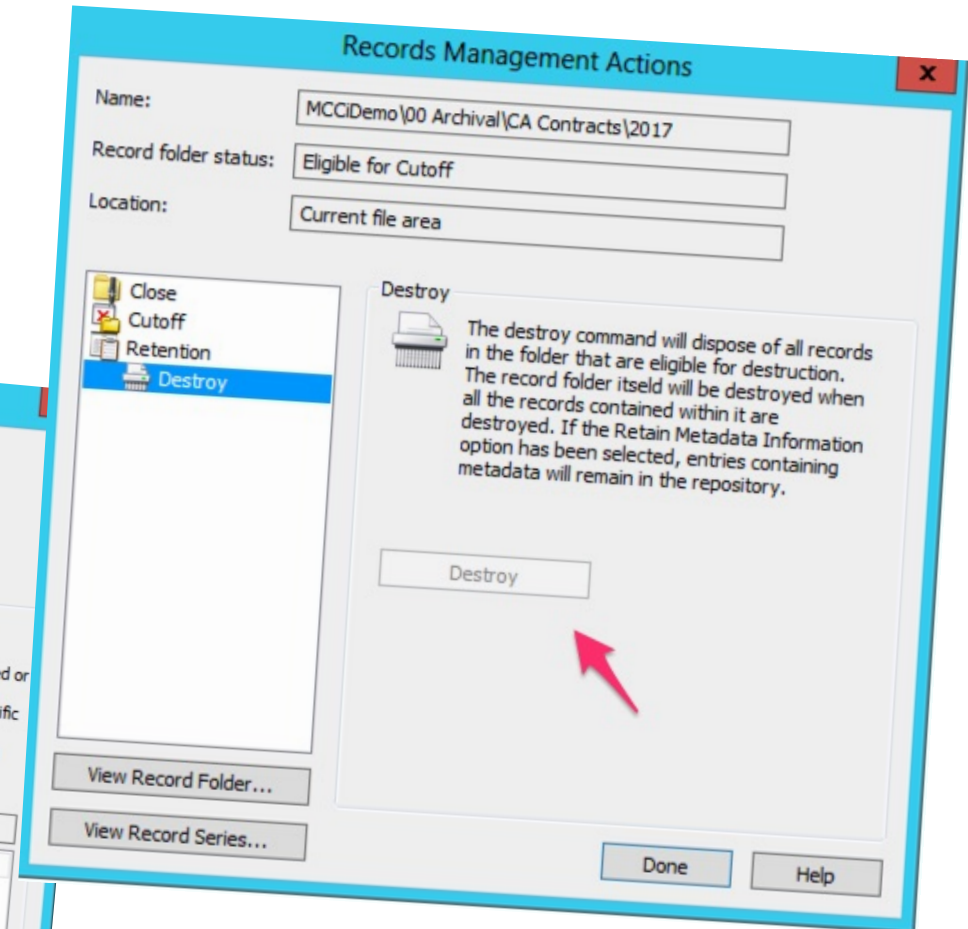
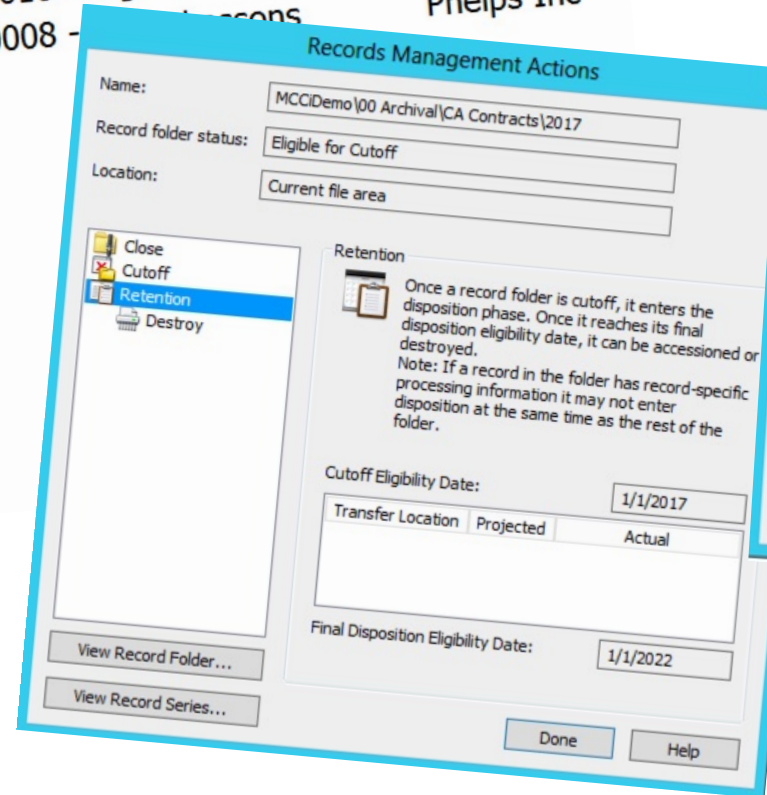
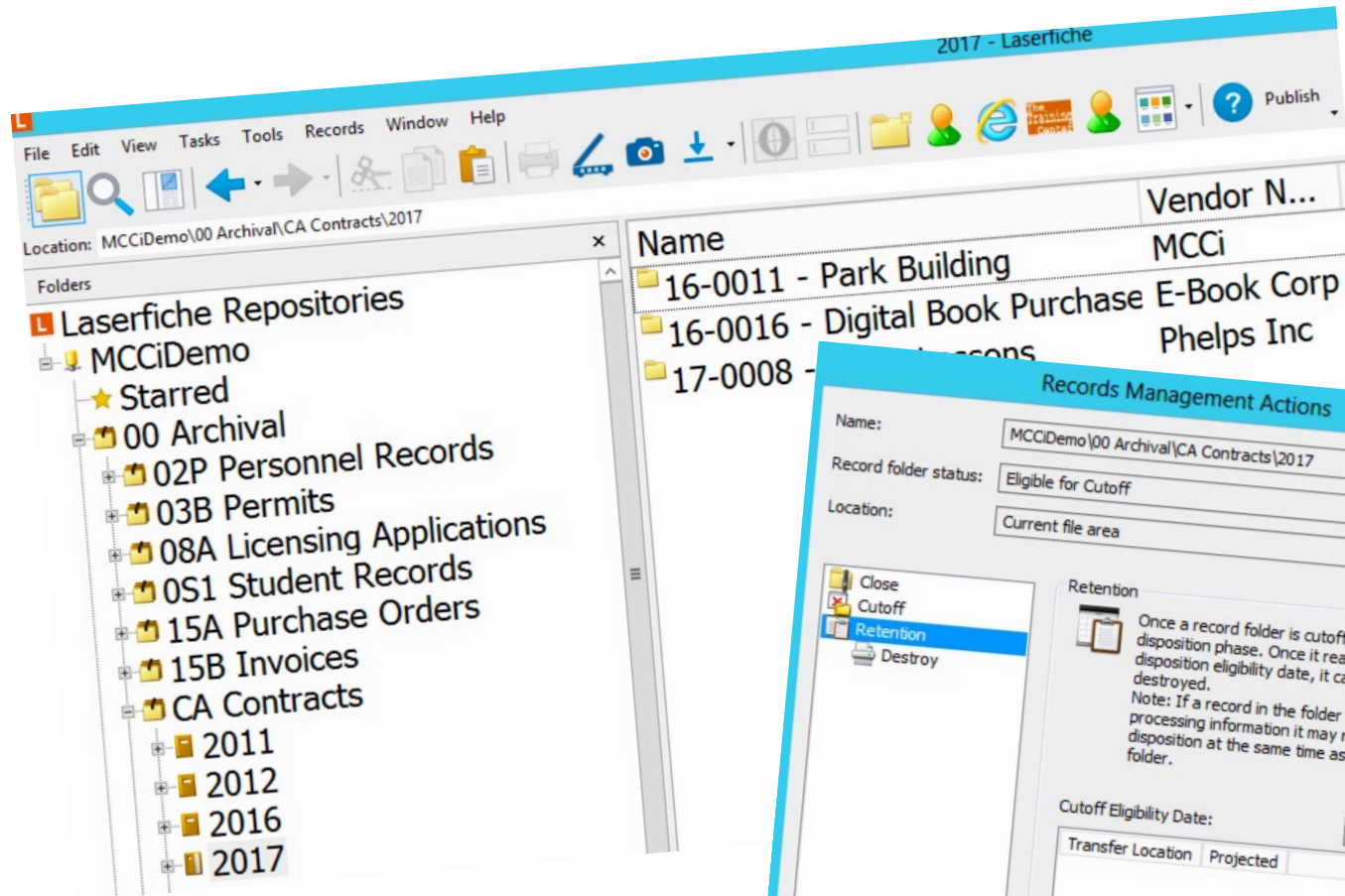
Destroy

Buttons: Close, Cutoff, Retention, Destroy, View Record Folder..., View Record Series..., Done, Help

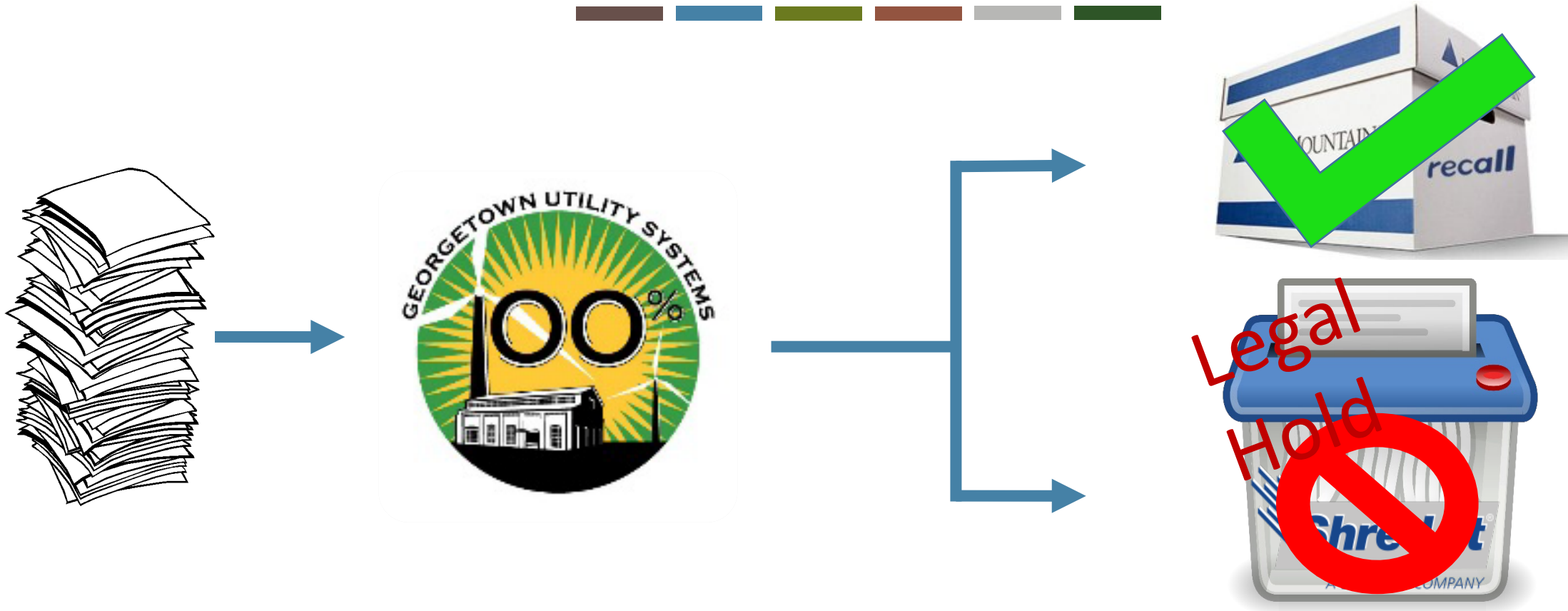
DIGITIZATION



DIGITIZATION



DESTRUCTION/ARCHIVE



Project Phases

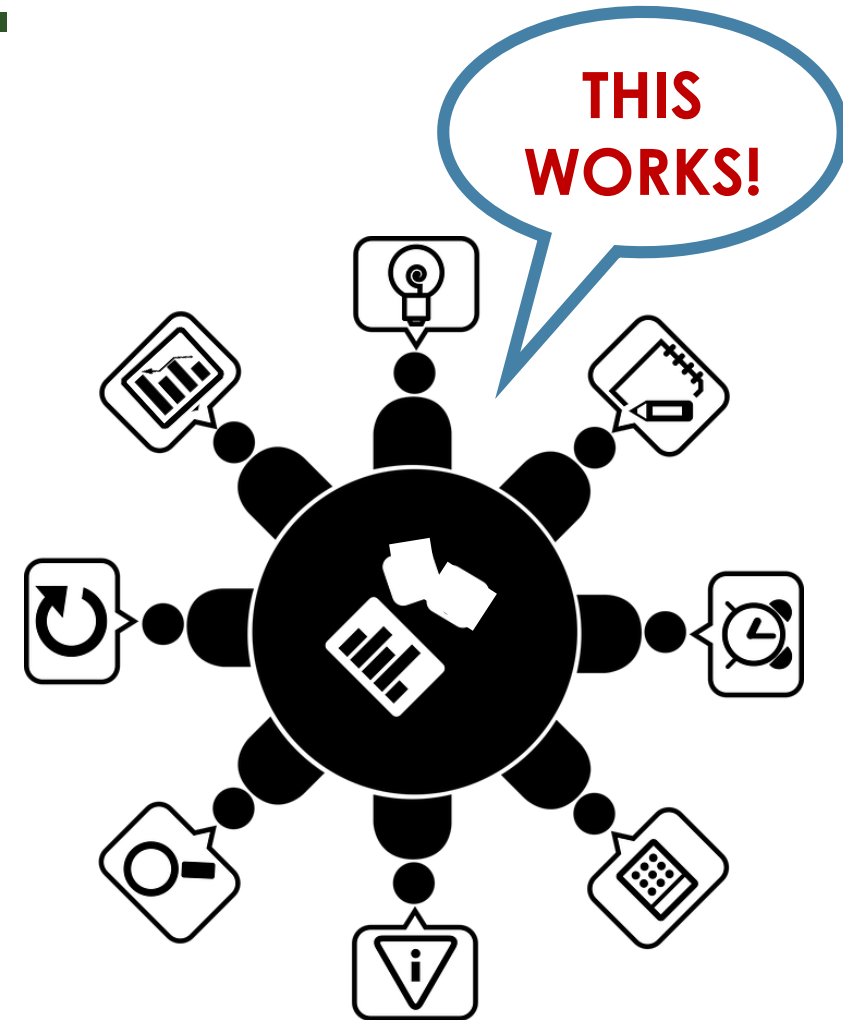
Inventory

Digitization

Destruction

RECAP

- A systematic control process of records that works for
 - Records Administrators
 - Staff
 - Citizens of Georgetown
- Enhances the ability to provide information to those who need it, when they need it, and in the most cost-effective manner



NEXT STEPS

- Continue to automate additional processes
 - Georgetown Utility Systems, Irrigation Rebate Form process
 - Georgetown Animal Shelter, Volunteer Form process
 - Georgetown Historic Survey and Archival Form process
 - Once complete, these processes will
 - facilitate increased user adoption
 - improve solutions based on user feedback
- Lastly, we plan to roll out this process across the city—perhaps the world!**



CONTACTS



Robyn Densmore, City of Georgetown, Assistant City Security
Robyn.Densmore@georgetown.org

Russell Haddock, MCCi, Territory Leader
rhaddock@mccinnovations.com

Cynthia Conomos, City of Georgetown, Records Program Manager
Cynthia.Conomos@georgetown.org

Matt Kunkle - City of Georgetown, Records Coordinator
Matthew.Kunkle@georgeotwn.org

Daniel Sumrall, City of Georgetown, Information Technology Senior Systems Analyst
Daniel.Sumrall@georgeotwn.org

Tracie Anders, City of Georgetown, Information Technology, Systems Analyst
Tracie.Anders@georgeotwn.org



Questions?

Georgetown Utilities Records Management Project