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Document Management Cuts Paper and Saves Money at Top Ranked City

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by **Robert Gast**

While the virtues associated with living in an environmentally conscientious way are as abundant as wavy shafts of tan prairie grass in mid-summer, one motive that exerts considerable gravity in the heated conservation debate is that of money. Naperville, Illinois, a city with muscular environmental policies, is setting an example for other cities by further paring back the inefficient use of resources and lessening its impact on the environment while making better use of funds.

Naperville, a city of approximately 145,000 people located about 28 miles west of Chicago, has been consistently ranked as one of the nation's top five best small cities to live in, according to Money Magazine. Naperville city government recognized the far-reaching benefits of conservation early on with programs for all of its operating departments including public safety, public works, parks and fire protection, as well as for businesses and residents of the community. Their eco-friendly practices are particularly important since seventy-five percent of the world's energy consumption occurs in cities, according to data gathered by Energe-Cites.

Replacing Inefficient Reporting Processes

Naperville once budgeted nearly \$22,000 for green-bar to satisfy the need for daily utility billing update reports, payroll update reports, routing reports, weekly, month-end and year-end reports and so on. A half box of green-bar (about 35 pounds-worth) would disappear on a few routine print jobs. Once printed, a messenger would deliver them to department offices scattered throughout the city. If an ad hoc report was needed, someone in IT would print it and have it delivered--a process that could take up to three hours. These reports were the product of an ERP system called [SunGard Public Sector](#) residing on an [IBM eServer i5](#), model 8203-E4A.

Once the ink had dried on the decision to dramatically reduce the number of printed documents, the challenge for their IT department became how to produce and distribute them in an electronic format without adding to their formidable workload. Another hurdle involved making them available online to city employees on an as-needed basis.

Saying 'Yes' to Modern Document Processing

According to LiLin Lo, Naperville's business systems team leader, "There were numerous jobs that produced a large number of reports that ran daily, weekly and monthly, and we used an enormous amount of paper. When I began to consider different technologies to replace printed reports with electronic documents and make them available to the city's intranet users, several electronic document management vendors told me that we would need to first convert the report files to ASCII and drop them in a shared directory so their EDM systems could handle it. I said, 'No way.'"

EDM systems are not all the same, and the definition changes depending on who you ask. In Naperville's case, one system adopted by the city--[Hyland Software's OnBase](#)--manages the administrative tasks common to government and uses a COLD peripheral for archiving. To make documents accessible to employees authorized to access Naperville's intranet, they also implemented [Microsoft's SharePoint Portal](#) and Web-publishing solution.

Automated, Electronic Distribution with Catapult

In her search for a way to bridge spool file reports to the SQL-based EDM systems, Lo uncovered



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Catapult from [Business Computer Design Int'l](#). On its own Catapult facilitates the automatic and secure selection, transformation and distribution of IBM i spool files to email, printers, fax-capable devices and to OnBase and SharePoint. "Catapult bridged the gap between our IBM machine and our EDM systems and, compared to other solutions with similar functionality, it was inexpensive. All-in-all, it was an easy decision to make," says Lo.

With the implementation of Catapult, all of Naperville city government's SunGard Public Sector reports are now delivered electronically through email. While several reports are delivered in their entirety, some are first split at the point where the recipient's email address appears in the report. "It depends on what the requirement is. Catapult is very flexible in this regard," says Lo.

They are then formatted as PDFs and RTFs and distributed to inboxes across city departments at given intervals. These reports are also written as .txt files to the COLD (computer output to laser disk) storage device which can be accessed ad hoc through OnBase, "We save tons of paper this way," says Lo. "The only time paper is used is when someone prints a report on their own--something we politely discourage. The entire system is centralized and the problems that normally occur when you have several autonomous departments are eliminated. Also, the level of transparency and visibility from an enterprise perspective is very good."

Eliminating Printing to Save Paper and Money

One example of how Naperville city government saves paper and money involves how utility payments are handled. Currently, the IT department receives various payments in lump sums from financial institutions. Once payments are applied to customer accounts Catapult grabs the segment of the cash report that displays the number of transactions and the dollar amount, and distributes it to people in the finance department where it can be quickly reviewed and corrected. Previously, the IT department printed a report for these transactions and carried it to the mailroom that would in turn deliver several copies of the report to the finance department.

In another instance, a scheduled job of daily activity sheets for building inspectors are generated by the SunGard building permit application, then emailed every morning to the inboxes of inspectors and supervisors. Prior to the use of Catapult, inspectors and supervisors had to log in to the ERP application and run a report called "Inspector Activity Report."

The government offices at Naperville also use Catapult to take spool files that contain output from Kronos time attendance application, split and format the resulting time sheets, and automatically email them to department managers and employees so they can review the number of weekly hours worked. Prior to Catapult this report would exceed 500 printed pages.

Push Reports to SharePoint for Browser Access

While OnBase handles industry specific tasks related to report distribution and access, Microsoft SharePoint functions as a generalized web-publishing mechanism for their intranet. As an example of how SharePoint is used, they have a scheduled job that generates a daily budget report showing how much money the city spends on different departments. Catapult automatically converts the spool file to a Word document and hands it off to a SharePoint directory where it's published for intranet user access. Every morning when managers want to review budget status, they can access this report through a browser. It displays exactly the same information present in the IBM i report. "It's much easier for people to access reports this way," says Lo. "If a group of people want to access a specific report that is not yet published, we can just run it in a scheduled job and publish it."

Compliance with the Freedom of Information Act (FOIA)--while an absolute necessity in a transparent democracy--has strained resources at all levels of government since enacted by the Johnson administration in 1966. Prior to the implementation of Catapult, FOIA requests were processed manually by the city's FOIA compliance officer who spent most of her work day accessing and printing documents, and then copying and mailing them. She would then maintain reports that documented the city's compliance with these requests. Now, Catapult formats the report as a .RTF or .PDF and sends it to the compliance officer's inbox. Once it's reviewed for accuracy, it's converted to a PDF and emailed to the person who made the request.

Says Lo, "In the public sector it's important to manage your resources wisely and responsibly. Our paper budget has been cut to around \$2,000 annually and with a highly automated reporting process, labor inputs have also been dramatically scaled back. We have made a great deal of progress already and have a lengthy wish-list of other processes to automate. I highly recommend Catapult and have discussed it with IT managers at other municipalities--and now they use it too."

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