

## Issue Brief

# Bringing Paperwork Under Control

How water and sewer districts can improve document access and work processes with enterprise content management

## Small Districts, Big Paperwork Challenges

When a water main breaks, repair workers may need an installation drawing that was made 40 years ago and is now buried deep in a file cabinet somewhere in the district office. Can it be found quickly? Will the paper copy still be legible and intact? Will other needed documents be in the same place?

Sewer and water districts may be small, but their challenges for accessing mission-critical information and documents can be mighty. Two factors drive these challenges: First is the scope and longevity of the capital projects and infrastructure managed by a district. Second is the complexity of delivering and managing routine services and operations when many employees work in the field or at satellite offices.

Another challenge is that sewer and water districts must manage and store a wide variety of document types, including:

- Geographical information system (GIS) applications and maps
- Construction plans, photos and installation schematics
- Vendor, contract and purchasing documents
- Maintenance, service, and testing schedules and reports
- Asset and inventory records
- Customer account forms and documents
- Agendas, minutes, discussion packets, public comments and other meeting records
- Historic papers, video and audio recordings

Many of these documents and files must be retained for decades, such as plans for buildings and utility infrastructure. And although some documents may already be digitized, they are often stored in multiple, non-integrated systems.

No matter the type of services delivered by a utility district, the challenges of accessing and managing large volumes of documents and electronic media will continue to grow.

## Information Everywhere, Except Where It's Needed

In any sewer and water district, the level of activity necessary to find, store, access and process paper documents is a serious impediment to work efficiency. Continued reliance on paper leaves a district unable to support:

- Employees who need simultaneous access to documents and files

## Functions That Can Be Improved with ECM

- ✓ Capital project management
- ✓ Ongoing infrastructure management
- ✓ Field inspections and testing
- ✓ Facilities and asset management
- ✓ Board and committee meeting materials and records
- ✓ Compliance reviews of project and service records
- ✓ Employee certification updates
- ✓ Customer account history
- ✓ Multimedia archives management



- Adequate security for documents that should have controlled access in order to comply with privacy laws and other regulatory requirements
- External users who may need access to selected documents
- Automated document processing through defined workflows that will improve the overall efficiency and customer service of district operations

The drawbacks of paper-only documents are particularly evident for field employees who must go to an office to receive work assignments and project documents, then return to file reports after their tasks are completed. Having the right information in hand, at the moment when it's needed, is essential for field employees to work effectively. The advent of economical and easily portable laptops, tablets and smartphones offers an

outstanding opportunity to transform the work of field employees by supporting mobile access to documents, reports and images.

For sewer and water districts, the dual challenges of more information and more work that depends on efficient access to it mean that paper storage or ad hoc technology solutions are no longer adequate. It's time to look at document access and workflows from the enterprise perspective, and to choose an enterprise content management (ECM) system that will integrate and improve information across all district operations.

## Streamlining Paper and Work with ECM

An ECM solution is a single system that stores documents and other content electronically. It manages the complete lifecycle of a document or file from the time it was created or captured to active processing and user access to scheduled archiving and deletion. An ECM system can integrate a central document repository with existing databases and systems such as GIS, enterprise resource planning (ERP), asset management, work orders and incident reports.

The system can manage data from online forms or scanned paper documents as well as uploaded images and media files, or reports generated by applications. An ECM system can also automate workflows to make paperwork processing and routine work tasks simpler, faster and more secure. The right ECM system delivers multiple benefits for sewer and water districts.

### **Reduced costs and burden for paper management.**

Electronic forms and data storage reduce costs for paper and cabinet space as well as the workload on staff for printing, copying, distributing and filing paper documents.

**Increased productivity and reduced backlogs.** Automated document processing and workflows help employees complete routine tasks efficiently and promote timely reviews, approvals, responses and other required actions.

**Easier access to essential information.** Employees can easily access needed information without learning multiple systems or trying to share paper files. Authorized users from contractors, vendors and other agencies can be granted secure access to the selected documents and files that are appropriate for their work.

**Better customer service.** Faster document processing and easier access to current and archived records help employees give more timely and accurate responses to customer inquiries and requests.

**Higher data security.** Sensitive information can be better controlled with electronic storage and configurable privileges for user access.

**Mobility support.** Off-site and field employees, and other mobile users, can work more effectively with document access and information uploads from mobile devices.

**Improved compliance.** Automatic retention management can be configured to meet public records laws and other regulatory requirements.

**Reduced risk of document loss.** Electronic archives eliminate the potential for loss of vital documents due to accidental disposal, fire or natural disaster, or physical aging of paper.

## Evaluation Factors for Choosing an ECM System

To meet their unique needs for document management, sewer and water districts will want to consider four primary evaluation factors when selecting an ECM system:

- A single document management system that integrates with other data and business systems
- A common repository for all documents and media types, including maps, drawings and photos, scans of handwritten notes, and video and audio recordings
- Support for mobile access by a variety of user devices, including specialized handsets, smartphones and tablets
- Flexibility for automating document handling, workflows and notifications

## An Achievable Vision

From paper documents that can be used only in an office to a complete electronic file that can fit on a device in an employee's pocket. From slow and cumbersome manual steps for paperwork handling to automated processes that accelerate efficiency through prompt routing, reviews and reminders. From information barriers to information flexibility. These visions are achievable when water and sewer districts implement new technology for managing content at the enterprise level.

## Resources

### **The Case for Enterprise Content Management (ECM) in Government, Center for Digital Government:**

[www.govtech.com/library/papers/Making-an-Impact-on-the-Enterprise-The-Case-for-Enterprise-Content-Management-ECM-in-Government.html](http://www.govtech.com/library/papers/Making-an-Impact-on-the-Enterprise-The-Case-for-Enterprise-Content-Management-ECM-in-Government.html)



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