

San Francisco Department of Public Health

Driving Efficiency by Migration to a Web-Based Approval Process

Benefits

- Significant reduction in paperwork
- Improved control of contract tracking
- Robust role-based security to manage approval process
- Increased time savings due to streamlined contract approval workflow

“Documentum has accelerated and streamlined the contract approval process, eliminating the pain of a slow, manual, paper-based system. Documentum content management capabilities and strong integrated workflow enabled us to achieve efficiencies and standardization that were never possible before.”

Donna Childers, IS Manager,
San Francisco Department of
Public Health

Business Overview

The mission of the San Francisco Department of Public Health (SFDPH) is to protect and promote the health of all San Franciscans. To fulfill that mission, the SFDPH assesses and researches the health of the community, develops and enforces public health policies, and establishes programs to prevent disease and injury. In addition, the organization also educates the public, trains health care providers, and promotes equal access to health care by all citizens.

Challenges

Hundreds of contracts go through the SFDPH every day, including federal government grants, contracts with suppliers, and more. Expediting these contracts has proven to be slow and difficult, in part because of an extremely labor-intensive, resource-heavy contract approval process.

The SFDPH recognized the value of migrating to a paperless system to alleviate the enormous paper trails generated and to establish a clear, enforceable workflow process for contract approval. The primary objective was to find a powerful solution that could handle the entire contract process, from creation to approval and delivery.

Cumbersome Paper Trails

The SFDPH’s approval process was extremely paper intensive. “The previous contract system created mountains of paperwork,” said Donna Childers, IS Manager. This system was environmentally unfriendly and costly, and slowed approval processes because documents needed to be physically transported from office to office. The paper-based system also made conducting audits very difficult: with documents stored in different offices around the Department, locating every piece of paper associated with any given contract was nearly impossible.

Lack of Standards

Contract approvals took anywhere from six weeks to a year. Delays resulted in part because the various offices used different contract forms. The first step to speeding contract approvals was the standardization of numerous forms from the agencies around the city. Next, SFDPH personnel needed immediate access to view, edit, and approve contracts electronically. To meet both objectives, the SFDPH has created a central repository to store standardized contract information, as well as historical records, and make that information accessible electronically to all city and county departments.

Inefficient Processes

The lack of a clear, structured process for approving contracts also hampered SFDPH’s efficiency. “SFDPH needed to implement a set of standardized, defined steps that every contract will go through,” explained Childers. “In addition to defining a structured process, the SFDPH needed a solution to ensure that contract officers followed the correct process and

Business profile

Customer Name

San Francisco Department of Public Health

Industry

Government

Geographies

San Francisco, California headquarters

Business Focus

Intranet & Extranet

EMC Documentum Products

Documentum ECM Platform, Application Builder

Deployment Summary

Currently 45 users; full deployment will include various departments throughout the city and county of San Francisco

that everyone involved was empowered to execute the tasks associated with their roles.” SFDPH recognized that automation of its paper-based contract process could generate huge efficiencies and create more streamlined communications among contract offices, drastically speeding up contract approval time.

EMC Documentum Solution

To automate the contract approval process, the SFDPH selected the EMC Documentum® enterprise content management (ECM) platform, basing its decision on the superior scalability, workflow integration, and content management capabilities of the Documentum solution. With Documentum, SFDPH developed a complete system for managing contract content and approvals among its numerous offices.

With Documentum, the entire contract management process is now paperless. Documentum has helped the SFDPH achieve significant time savings, cut the labor involved with transferring contracts between offices, eliminate mailing and transportation costs, enforce standardization of contracts, and provide anytime access to contract information for all affected personnel.

Implementing an Electronic Audit Trail

Using the tracking, version control, and virtual document features of the Documentum solution, auditors can quickly access and view the entire history of a contract, including any related notes and changes. “For documents that pass through so many departments within the city, it is imperative that modifications and contract histories can be tracked,” added Childers. “With Documentum, we not only track the changes that were made and by whom, but we can provide auditors with the date and time those changes were made.” Having this information at their fingertips allows auditors to work much more quickly and efficiently, find and resolve problems faster, and help SFDPH eliminate costly errors.

Ensuring System-Wide Security

The Documentum solution enables role-based security for all personnel handling SFDPH contracts, ensuring that only the right personnel have access to appropriate content. All approvals can now be performed online with electronic signatures, a vital feature for maintaining data integrity. Different access levels can be granted to various constituents and the groups they belong to. This, along with process automation, enables the right people to view and act upon documents more quickly, driving faster contract approval. “Security has been built in every step of the way, a key requirement for us,” said Childers.

Time Savings via Workflow Integration

SFDPH leveraged Documentum’s workflow capabilities to streamline contract approvals. Added Childers, “We hope to realize significant time savings by implementing the electronic workflow process that manages the approval of contracts. This facilitates communications between the various departments in San Francisco, and ensures the appropriate steps are followed and expedited.” The process involves the following: creation of a contract, review by all appropriate parties, and final approval through electronic signing by delegated signatories.

Summary

With the Documentum ECM platform, SFDPH was able to implement an integrated contract management solution with superior content management capabilities. SFDPH realized immediate benefits through migration to a paperless system and implementation of content management and workflow process, including business process automation, scalability, and security. In addition, SFDPH plans to leverage Documentum to support an extranet through which contracts and related information can be accessed by partners and suppliers directly, further executing on the vision of a secure, fully automated contract management system.



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